

#NORA

THE NORDIC ALLIANCE FOR
COMMUNICATION & MANAGEMENT

THE NORDIC COMMUNICATIONS REPORT 2021

Current and future trends
in Norway, Denmark, Finland and Sweden

September 2021



THE NORDIC COMMUNICATIONS REPORT 2021
Current and future trends in Norway, Denmark, Finland and Sweden

**Alexander Buhmann, Jeanne Link, Finn Frandsen,
Vilma Luoma-aho, Jesper Falkheimer, Ansgar Zerfass**

A study conducted by
the Nordic Alliance for Communication and Management (#NORA)
in collaboration with the national communication associations of
Norway (Kommunikasjonsforeningen),
Denmark (K1 Kommunikationsforening),
Finland (ProCom),
Sweden (Sveriges Kommunikatörer),
as well as with
the European Communication Monitor.

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Foreword



The Nordic countries, with their strong welfare states as well as their particularly high degree of transparency, generalized trust, social equality and press freedom warrant particular attention across all strategic communication domains (cf. Frandsen & Johansen, 2016; Maier et al., 2019; Melgin et al., 2018; Pamment, 2016; Skogerbø et al., 2021). For this report, the Nordic Alliance for Communication and Management (#NORA) has collaborated with national communication associations in Norway, Denmark, Finland and Sweden as well as with the European Communication Monitor series to publish the first ever pan-Nordic study of the communication field. The respondents of the survey work in communication agencies and in communication departments in joint stock companies, private companies, government-owned organisations, public sector organisations, political organisations, as well as non-profit organisations and associations. The insights presented in

this report shed light on current and future trends in the communication field in the region. The study explores important themes, such as trends in the digitalisation of communications, the changing professional roles of communication practitioners, the emerging notion of “CommTech”, the various uses of video-conferencing, and the salary structures among professionals in the Nordics. All results are compared across the Nordic countries and they are benchmarked against the rest of Europe.

This report has been prepared and written together with my co-authors Jeanne Link, Finn Frandsen, Vilma Luoma-aho, Jesper Falkheimer, and Ansgar Zerfass and supported by Kristin Mc Adam and Elise Marthinsen, who took care of editing and the design respectively. On behalf of the team, I would like to thank all professionals who participated in the survey. I would also like to thank the corporate partners of the Nordic Alliance for Communication & Management (#NORA) who support our research, bridging academia and practice at the intersection of communication and management disciplines, namely: Ulrike Haugen (DNV), Håkon Mageli (Orkla), Cathrine Torp, (The Research Council of Norway), and Yngve Kveine (BI Norwegian Business School). I am also grateful for the support we received from professional associations for this study, namely the national communication associations of Norway (Kommunikasjonsforeningen) Denmark (K1), Finland (ProCom) and Sweden (Sveriges Kommunikatörer) as well as from the European Communication Monitor. For the latter, I would like to thank Ralph Trench, Dejan Verčič and Ángeles Moreno, and Jens Hagelstein for their great work. Finally, I would like to express my gratitude to all academic partners of #NORA who supported the process of data collection in an effort to build this unique pan-Nordic sample.

Associate Prof. Dr. Alexander Buhmann
Director, The Nordic Alliance for Communication
& Management (#NORA)

Research Design, Methodology and Demographics

The Nordic Communications Report is an academic study, exploring the practices and professional development of the communications field in Norway, Denmark, Finland and Sweden. For this study the Nordic Alliance for Communication and Management (#NORA) is collaborating with national communication associations of the four Nordic countries and the European Communication Monitor (ECM) series.

The present study addresses various topics. First, it covers key challenges linked to the current trends in the digitalisation of strategic communication (Falkheimer & Heide, 2018; Nothhaft et al., 2019) and public relations (Tench & Waddington, 2021; Valentini, 2021). Second, the study explores the changing roles for practitioners working in the field. Furthermore, the emerging popular notion of "CommTech" as well as the use of video-conferencing are discussed in this report – both issues that have clearly gained in relevance due to the Covid-19 pandemic. And finally, the data used here allows us to compare the salary structures among Nordic communication professionals to the European average.

The results of this report are based on 457 responses from communication professionals working in communication departments and agencies across Norway (n = 104), Denmark (n = 77), Finland (n = 105) and Sweden (n = 171). The majority are communication leaders with a solid qualification base and evidenced longevity of tenure in the field. 28.9 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 22.3 per cent are unit leaders or in charge of a single communication discipline in an organisation. 79.2 per cent of the professionals interviewed have more than ten years experience in communications. The average age is 47.8 years. Four out of five respondents work in communication departments in organisations (joint stock

companies, 10.3 per cent; private companies, 15.1 per cent; government-owned, public sector, political organisations, 45.5 per cent; non-profit organisations, associations, 14.9 per cent), while 14.2 per cent are communication consultants working freelance or for agencies. The findings of this study are based on data gathered within the framework of the ECM 2021 (see page 27 for more details). Therefore, the collected data was subject to secondary analysis and examined with regard to the four Nordic countries.

Data was collected with the help of an online questionnaire that consisted of 37 questions in English language. More than 15,000 professionals throughout Europe were invited with personal e-mails based on a database built by the ECM research team over a decade. Additional invitations were sent via national research collaborators and professional associations. In the Nordic countries, data collection was supported through email and newsletters from by the collaboration national communication associations. The sample has been strictly selected and qualified. Only fully completed questionnaires from participants who were clearly identified as part of the population were used. All others were deleted from the dataset.

Regression analyses were applied to develop and test linear models predicting selected variables and effects. Results have been tested for statistical significance with, depending on the variable, Chi², ANOVA / Scheffé Post-hoc-Test, independent samples T-Test, Pearson correlation or Kendall rank correlation. The applied methods are reported in the text below including comments on the significance of results. Comparative insights were calculated between the four Nordic countries (Norway, Denmark, Finland and Sweden) as well as between the four Nordic counties as a cluster versus Europe as a whole (i.e., the data from 46 European countries).

The Nordic Sample: Professional and personal background of the respondents

Position

Head of communication, Agency CEO	28.9%
Unit leader, Team leader	22.3%
Team member, Consultant	41.1%

Job experience

More than 10 years	79.2%
6 to 10 years	11.6%
Up to 5 years	9.0%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	2.2%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	56.7%
Bachelor (B.A., B.Sc.)	35.9%
No academic degree	5.3%

Organisation

Joint stock company	10.3%
Private company	15.1%
Government-owned, public sector, political organisation	45.5%
Non-profit organisation, association	14.9%
Communication consultancy, PR agency, freelance consultant	14.2%

Gender / Age

Female	71.3%
Male	27.6%
Age (on average)	47.8 yrs

Figure 1. n ≥ 452 (for the full European sample see: Zerfass, Buhmann, Tench, Verčič, & Moreno, 2021).

1 Strategic issues in communication management

1.1 The most important strategic issues for the profession

Very much like their peers across the rest of Europe, communication professionals in the Nordic region consider building and maintaining trust as the number one strategic issue for the next three years. This means that trust is expected to dominate the agenda of the profession at least until 2024. Economic turbulences related to the pandemic will likely perpetuate this trend. Currently, 39.8 per cent of respondents named building and maintaining trust when asked about the most important issues for communication management in this period. Nordic communicators also highlight linking business strategy and communication as a major challenge for the coming years (37.4%). Here differences with the rest of Europe

(30.5%) are more pronounced. Across Europe, on the other hand, communicators put the more operational issue of exploring new ways for creating and distributing content as the second important strategic issue (32.4%), which is much less central in the Nordics (24.9%). Another prevalent topic that is particularly relevant in the Nordics is advising and coaching executives or co-workers in communicative issues, as more than one third of the Nordic communicators underpin the relevance of this subject. This result goes hand in hand with the rising importance of the »Coach and Advisor« role that communication professionals can take within their work (see section 2 for more details on professional roles).



«These are interesting results which suggest that Communication Directors need to have a "seat at the table" and work as trusted advisers for the top management. At DNV the top priority for me and my team is to develop and implement a communication strategy that helps the organization to deliver on our ambitious strategic goals and to achieve our vision of "being a trusted voice to tackle global transformations". Digitalising communication processes and content distribution score lower – this probably shows that these have become more operational tasks. I believe Communication teams in the Nordics have been ahead of their European colleagues for several years when it comes to digital communication strategies».

Ulrike Haugen
Executive Vice President
Chief Communications Officer

Most important strategic issues for communication management until 2024 (Nordics versus Europe)

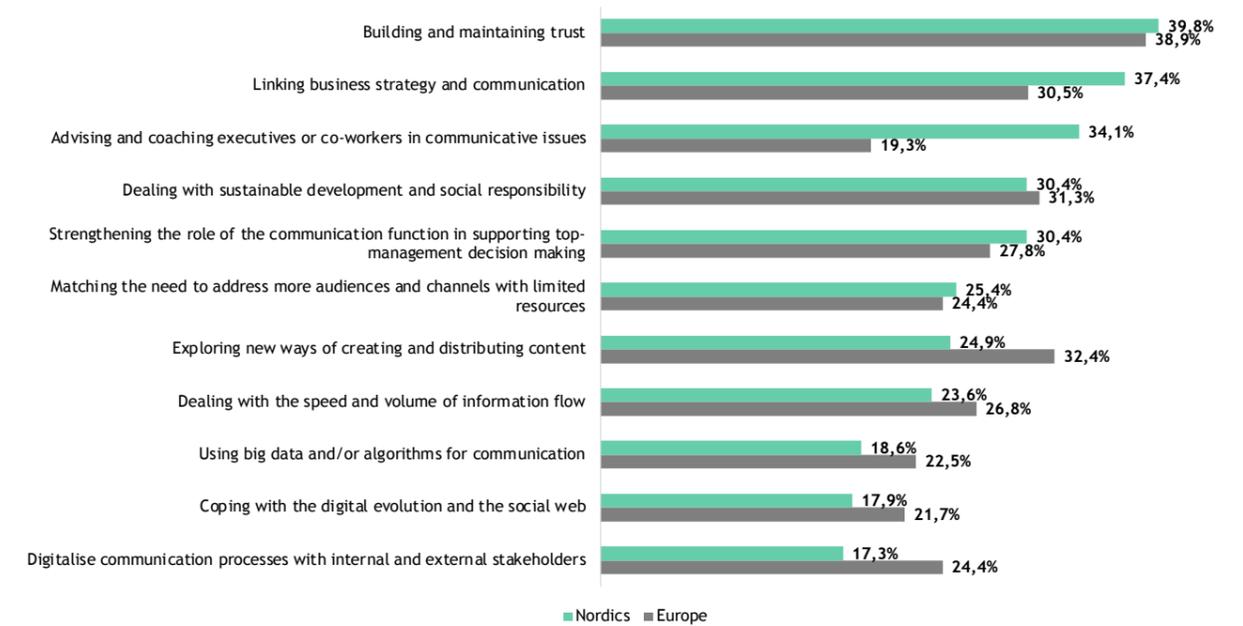


Figure 2. n = 457 (Nordics) / n = 2,664 (Europe). Question: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issues.

Interestingly, «advising and coaching» is ranked last by the European average as only 19.3 per cent of the European communication professionals see it as a top issue. Instead, European communicators put dealing with sustainable development and social responsibility in third place (31.3%), which ranks only slightly lower in the Nordic region (30.4%).

Regarding issues that deal with digital communication practices such as digitalising communication processes with stakeholders, it is notable that Nordic practitioners rate the importance clearly lower than the European average.

1.2 Exploring the top 3 strategic issues in the profession

Taking a closer look at the Top 3 issues defined by Nordic communicators, quite remarkable differences between the four countries are evident. In comparison to the European average, Finnish communication professionals emphasise the importance of building and maintaining trust (44.8%), while only 33.7 per cent of the Norwegian communicators see it as a major challenge. Communication practitioners in Sweden (40.9%) and Denmark (39.0%), however, rank this issue similar to the European average. Linking business strategy and communication seems to be critical for Danish communicators as 46.8 per cent define it as important

strategic issue for the next years, whereas their colleagues in Norway (36.5%), Finland (35.2%) and Sweden (35.1%) are less interested in this topic. Advising and coaching executives or co-workers in communicative issues, however, seems to be close to the heart of Swedish communication professionals as 41.5 per cent think it will be important in the next three years. In comparison to Sweden, communicators from Denmark (33.8%), Finland (30.5%) and Norway (26.0%) rate the importance of advising and coaching lower.



«Advising organizational members outside the communication function as well as linking and aligning communication with organizational strategy score high in the Nordics compared to Europe. This suggests a high demand for organizational-level strategic insight and management acumen among communication professionals in our region. It also suggests that at the executive level, it is less about the tools and more about strategic thinking. Future leaders in the communication field need education in both»

Peggy S. Brønn,
Prof. emer., BI Norwegian Business School

Top 3 Strategic issues in the Nordics

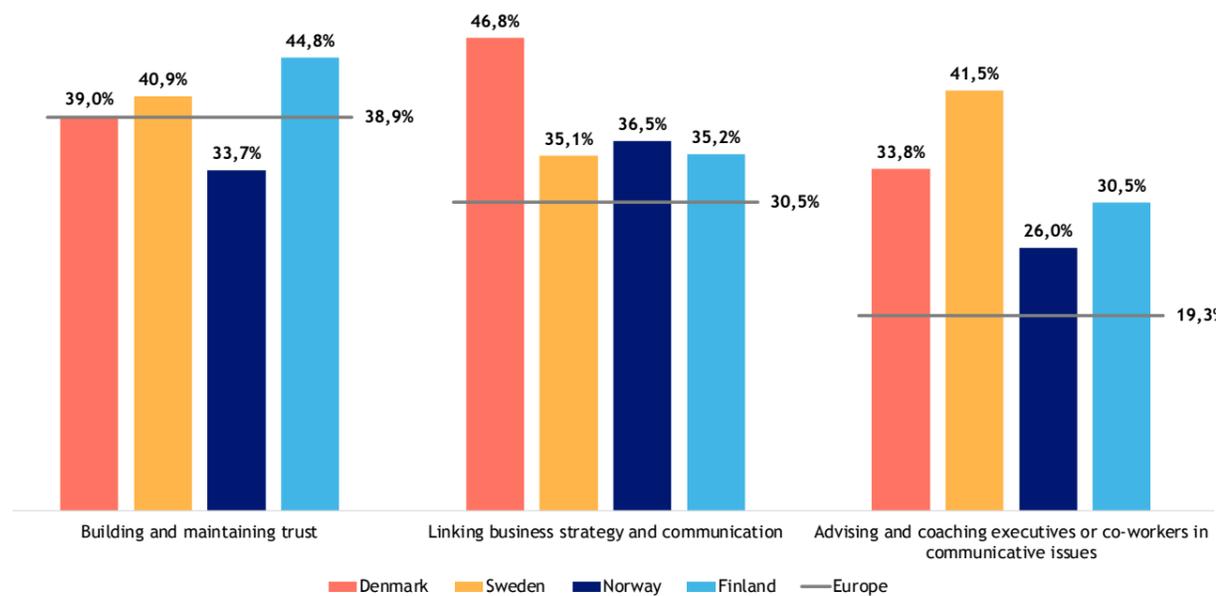


Figure 3. n = 457 (Nordics) / n = 2,664 (Europe). Question: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issues.

2 Future roles of communication practitioners

2.1 Professional roles in communication management

Exploring professional roles of communicators has been a popular research topic for decades (Broom & Smith, 1979; Dozier & Broom, 1995; Fieseler et al., 2015). Due to the increase in range of tasks performed by practitioners, different facets of role assumption and related aspects such as competence development are being researched in the body of knowledge in recent years (Falkheimer et al., 2017; Gregory & Willis, 2013; Mellum, 2021; Sveriges Kommunikatörer, 2019; Tench & Moreno, 2015; Verhoeven et al., 2011; Zerfass & Franke, 2013). In the Nordic countries, we rely heavily on truth and transparency. This emphasizes the need for transparent communication and the importance of everyone having equal access to knowledge. This has enabled highly educated work forces, but as disinformation spreads, communication professionals have new duties: maintain trust, develop corporate character, verify information sources, and continue to monitor issues and arenas. It is communication professionals' job to maintain the social capital – the trusted networks – of their organizations, in good times and bad.

According to a newer systematisation of different roles of practitioners five roles that practitioners may perform

to varying degrees can be distinguished: Communicator, Ambassador, Manager, Coach and Advisor. The Communicator and Ambassador roles are traditional 'outbound' roles focusing on communicating with stakeholders, while the Coach and Advisor roles are 'inbound' roles focusing on supporting executives, middle managers or other members of the organisation. The Manager role includes tasks relevant for operating the communication department or agency itself. The data reveal substantial differences in the performance of different roles between European communication managers on the one hand and Nordic practitioners on the other hand. While 42.8 per cent of European practitioners on average devote all or a substantial share of their worktime to the Communicator role, only 27.8 per cent of the Nordic practitioners perform this role extensively. Quite important for communicators in the Nordics seems to be the Coach role, which is enacted regularly by 22.2 per cent. In the general European sample 27.7 per cent devote a great part of their time to this role. The Manager role (15.7%), the Advisor role (15.5%) and the Ambassador role (11.8%) are not enacted that intensively by Nordic communicators, while European practitioners perform those roles more more widely.



«It's interesting to see that the Nordic countries spend less time on management and are less confident in their leadership competencies. I believe we need to strengthen these to ensure our profession is seen as relevant at an executive level. Communication needs to be able to position their organizations in an increasingly complex landscape and this requires leadership, brand/marketing and strategic capabilities beyond traditional communications disciplines».

Cathrine Torp
Executive Director – Communications and user experience, The Research Council of Norway

2.2 Role enactment in the Nordic countries

Besides the differences illustrated above, it is noticeable that also practitioners from the Nordics perform those roles to a varying degree. The Communicator role (38.1%) and the Manager role (21.9%) for example are of high relevance in Finland, whereas practitioners from the other

Nordic countries carry out these roles less often. Swedish practitioners instead, emphasise the Advisor role (19.9%) as well as the Ambassador role (16.4%), whereas communicators from Norway see themselves as coaches (24.0%) to a higher degree than the others.

Role enactment of Nordic practitioners

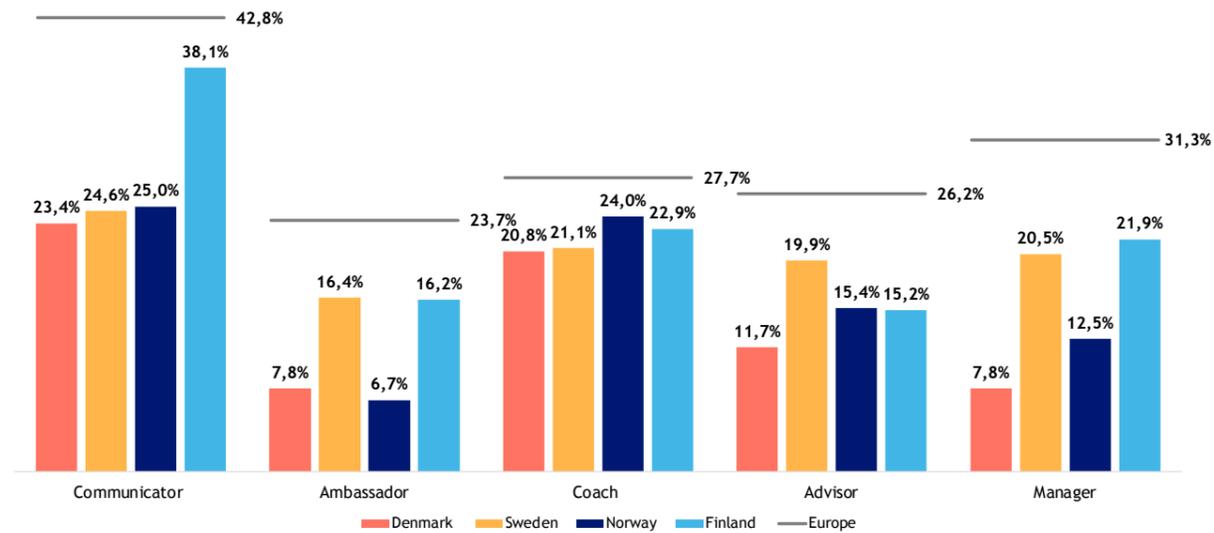


Figure 4. n = 457 (Nordics) / n = 2,664 (Europe). Question: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week.

2.3 Competencies of communication practitioners

When it comes to the competencies and personal attributes relevant to the various roles, it is not surprising that a majority consider themselves well equipped to communicate on behalf of their organisations. While 77.1 per cent of the European sample rates their communicator competencies high, 80.9 percent of the Nordic communication professionals attribute these competencies to themselves. In contrast, only 36.4 per cent of the Nordic practitioners consider their management competencies to be high, while almost one in two communicators within the Euro-

pean sample (49.8%) is confident about these proficiencies. Not surprisingly, team members estimate their managerial skills comparatively lower than practitioners at upper levels. Regarding the competence field of coaching, it is notable that Nordic communicators rate their coaching competencies higher (60.6%) than the European average (53.7%). Furthermore, the advising competencies are also rated quite high by both Nordic (59.7%) and European communicators (57.6%).

Competencies of communication practitioners in the Nordics versus Europe

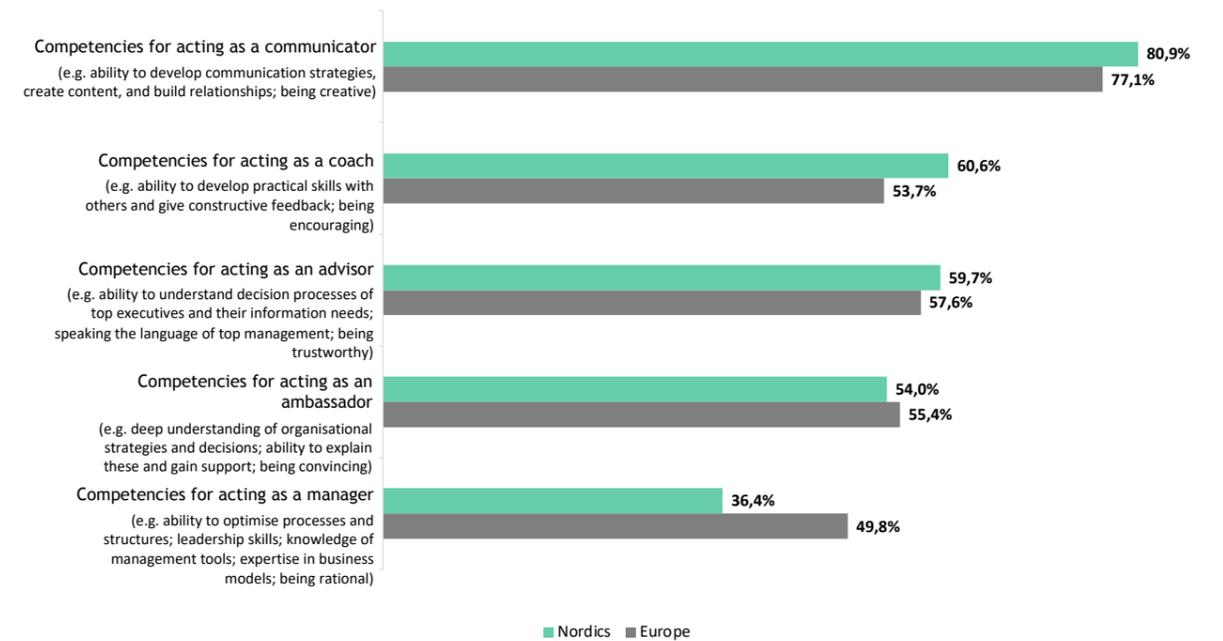


Figure 5. n = 457 (Nordics) / n = 2,664 (Europe). Question: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequency based on scale points 6-7.

Perceived competencies also differ among communicators in the Nordics (see Table 1): Danish professionals emphasise their Communicator (88.3%) and Advisor competencies (71.4%). While Swedish communication practitioners, rate their Coach competencies (64.9%) higher than

other Nordic practitioners. Regarding competencies for acting as a manager, almost half of the surveyed communication managers from Finland (43.8%) notably consider themselves able to fulfill this role.



«Developing stronger management knowledge and skills in the communication profession will be key. This role will not only bring opportunities for individual careers, but on the level of the profession management competencies will further enable professionals to advance communication issues and challenges on the agenda of their organization».

Yngve Kveine
Executive Vice President Communication,
Corporate Communications and Public Affairs,
BI Norwegian Business School

Competencies for different roles

	Denmark	Sweden	Norway	Finland	Europe
Competencies for acting as a communicator	88.3%	75.4%	79.8%	80.0%	77.1%
Competencies for acting as an ambassador	59.7%	55.0%	51.9%	49.5%	55.4%
Competencies for acting as a coach	59.7%	64.9%	54.8%	62.9%	53.7%
Competencies for acting as an advisor	71.4%	54.4%	59.6%	53.3%	57.6%
Competencies for acting as a manager	36.4%	37.4%	27.9%	43.8%	49.8%

Table 1. n = 457 (Nordics) / n= 2,664 (Europe). Question: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequency based on scale points 6-7.

2.4 The coach and advisor role

Coach and Advisor: Both roles are expected to rise strongly in importance in the near future

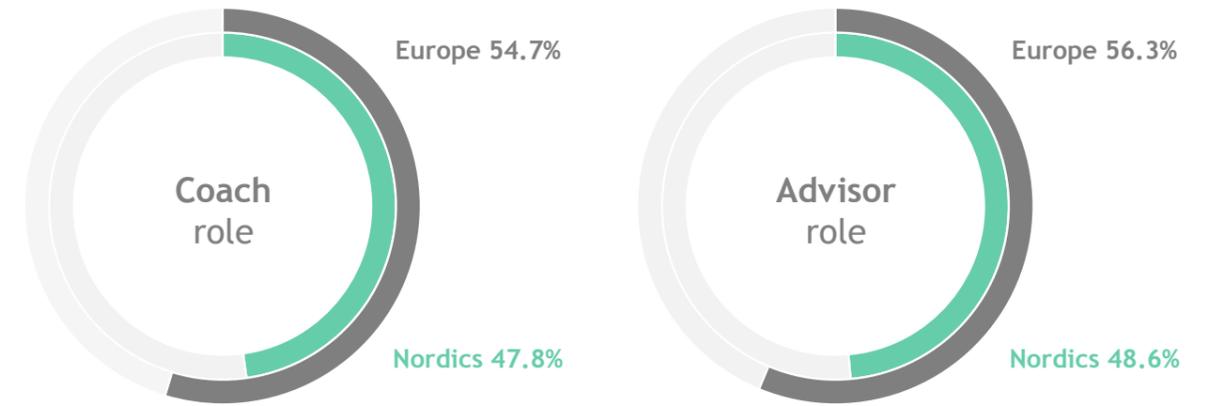


Figure 6. n = 457 (Nordics)/n= 2,664 (Europe). Question: We'd like to focus a bit more on the coaching and advising roles. How important will these roles become in the next three years for yourself or for somebody else working in your current position? Scale 1 (Far less important than today) – 7 (Much more important than today)

Advising and coaching activities are named as one of the Top 3 strategic issues by Nordic practitioners, which is reason to take a closer look at the related professional roles. European and Nordic communicators agree that these roles will become more important in the next three years. Nevertheless, European communicators expect the importance of the roles for the upcoming years to be even higher than their Nordic colleagues.

Communicators can provide guidance on different ways. They can coach executives, co-workers or clients based on professional expertise or enable them to improve themselves. Typically, communicators provide content for speeches or presentations, but they can also help others to communicate on their own for example when it comes to social media skills and knowledge. When it comes to coaching and advising practices on the job, Nordic communicators in general apply these practices less often than the European average. A closer look at the Nordic countries shows significant and visible differences.

In Finland, coaching and advising practices are used the most. This includes helping executives or clients under-

stand the communicative dimension of their business decisions or to communicate on their own. Furthermore, the guidance of communication activities is performed significantly more often by Finnish communicators than by their Nordic colleagues. Only the guidance of business decisions by executives or clients through communicative insights is performed significantly more often by Norwegian communicators, while Swedish and Danish communicators employ those practices less often.

Interestingly, the recipients of business-related advices also differ between the Nordics. While Norwegian communicators normally counsel top executives in their business decisions, Finnish communication professionals guide mostly heads of divisions, business units or other functional departments of the organisation or clients. Danish and Swedish communicators, on the other hand, are giving advice more often to middle managers responsible for specific processes or services as well as to 'heads of...', but less often to top executives.



«Communication and PR belong to everyone in the organization. Professional communicators' role is to be a coach to the implementation of the communication strategy. The role of the advisor requires complete professional expertise, leadership and change management skills. The role of the coach requires high morale. In the future, the communication professional will act as a guardian of the ethics of the organization. In such a role, communicators' work has a strong social impact».

Elina Melgin
Managing director of ProCom, the Finnish Association of Communications Professionals

Coaching and advising practices in the Nordics

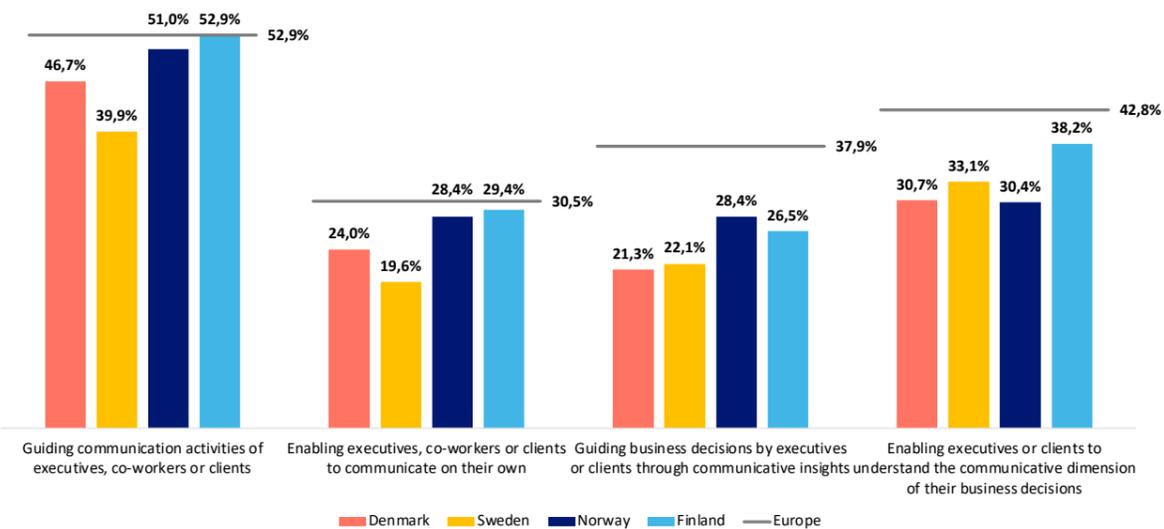


Figure 7. n = 442 (Nordics) / n = 2,526 (Europe). Question: When thinking about your roles as advisor or coach, how often do you perform the following activities? Scale 1 (Never) – 7 (Very often). Frequency based on scale points 6-7.

3 CommTech and digital infrastructure

3.1 Importance of digitalising stakeholder communications and building a digital infrastructure

Digitalization is both a key challenge and opportunity for the future of enabling «communicative organisations» (Heide et al. 2019). Specifically, digital tools and software are increasingly important for communications. Due to the Covid-19 pandemic the digital transformation of communication departments and agencies has taken a huge leap. The upcoming notion of CommTech (Communication Technology) widens the previous view on digital technologies as channels or instruments (e.g. social media, intranets, websites) by asking how digital technologies can

modify communication processes along the whole stakeholder journey (e.g. Arthur W. Page Society, 2021; Weiner, 2021).

Effectively managing the digitalisation of communications requires the use of digital tools and technology on different layers: (a) digitalising communication processes with internal and external stakeholders; and (b) digitalising infrastructure, i.e. supporting internal workflows within a communication department or agency.

Importance of digitalising stakeholder communications and building a digital infrastructure

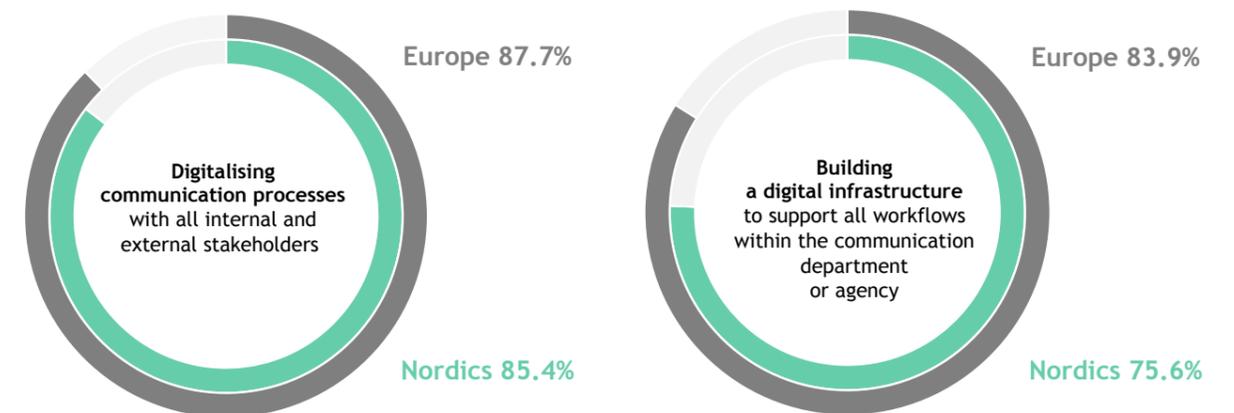


Figure 8. n = 457 (Nordics)/n= 2,664 (Europe). Question: Most communication departments and agencies use software applications and digital services to support stakeholder communications and internal workflow. The Covid-19 pandemic and trends towards more agility and virtual collaboration speed up this development. But it doesn't mean that such investments and changes are always necessary to meet goals and expectations. How important are the following aspects for the success of your communication department or agency? Scale 1 (Not important) – 5 (Very important).

The results of this study show that introducing Comm-Tech is a necessity and a huge challenge at the same time. A vast majority of European practitioners highlight the importance of digitalising stakeholder communications (87.7%) and building a digital infrastructure to support internal workflows (83.9%). Nordic practitioners underline the importance of digitalising communication processes

(85.4%), but report a lower necessity to build a digital infrastructure (75.6%). Especially Swedish communicators report a higher need to digitalise communication processes (90.1%) as well as to build a digital infrastructure (84.8%) than their Nordic colleagues. In Denmark for example only 62.3 per cent of the practitioners highlight the demand of building an appropriate digital infrastructure.



«Digitalization in society and companies is still a major change to come. But when the pandemic hit, most workplaces immediately converted to digital tools and implemented new processes. For many communicators that opened the somewhat new role as a trusted advisor, facilitator and leadership coach. The value of internal communications as a change agent became more evident».

Hanna Brogren
CEO and General Secretary of the Swedish Communication Association

3.2 Digital maturity

In general, the use of own platforms to communicate with stakeholders does not seem to be critical for Nordic communicators. Only Danish communication departments and agencies (54.5%) lag clearly behind their Nordic fellows as well as behind the European average (64.3%). However, almost two thirds of Nordic communication departments and agencies are quite experienced in using external digital platforms for stakeholder communications. Particular-

ly Finish (74.3%) and Norwegian (73.1%) communication departments and agencies seem to be familiar with using external platforms, while Swedish communication professionals (63.7%) report a lower maturity for this dimension. The provision of digital tools for team members is also not considered to be challenging for Nordic communicators at all.

Digital maturity in the Nordic countries

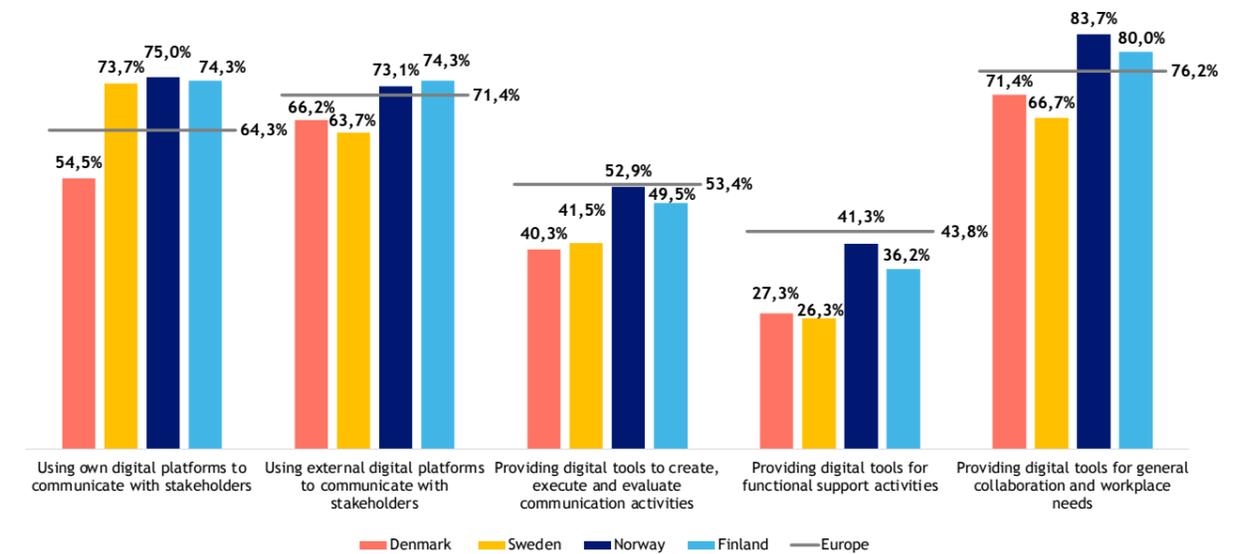


Figure 9. n = 457 (Nordics) / n = 2,664 (Europe). Question: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Frequency based on scale points 4-5.

However, when it comes to the provision of digital tools for support activities, the current level of digital maturity is not satisfying. Only a minority is believed to be mature in providing digital tools for communication-specific support activities like managing digital assets. This is particularly

true for Swedish (26.3%) and Danish (27.3%) communication units. As the data for the European sample reveal, digital maturity differs significantly across types of organisations: joint stock companies are clearly ahead and governmental organisations are lagging behind.



«Even before the pandemic, using digital platforms to communicate with stakeholders was a well-known method for most communication professionals in the Nordic countries. In addition, many companies and organisations were already using digital tools for collaboration. The Nordic countries are known for being digitally advanced, so I would have expected more similar results across the region. It will be interesting to follow the development in the years to come and gather more data for "intra Nordic" comparisons».

Therese Manus
Managing Director of the Norwegian Communication Association

3.3 Strategies and approaches for digitalising stakeholder communications and digital infrastructure

Strategies and concepts in the Nordics versus Europe

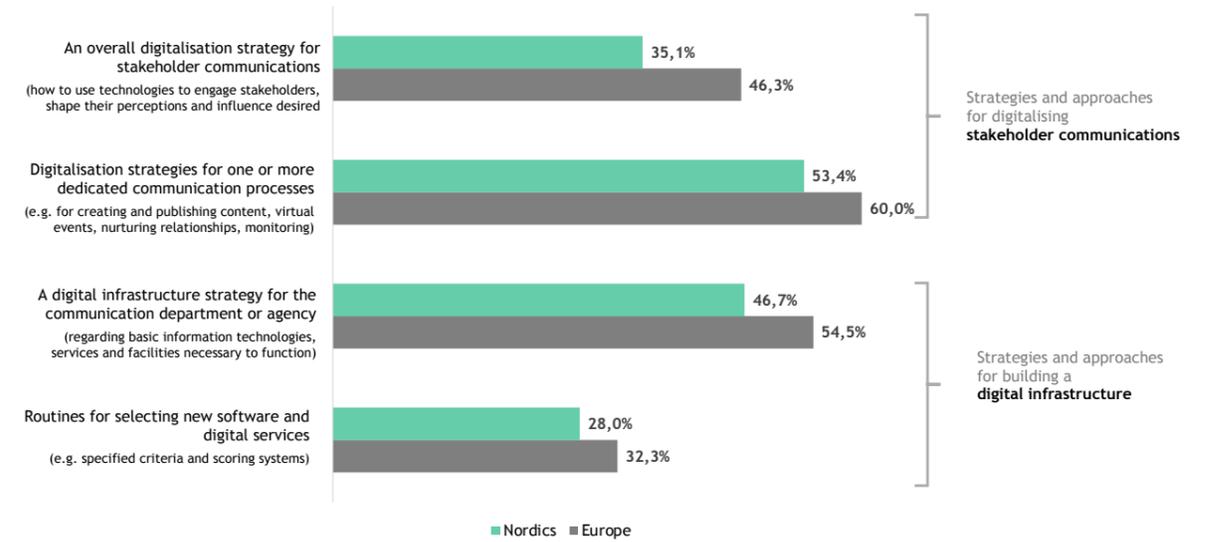


Figure 10. n ≥ 438 (Nordics) / n ≥ 2,462 (Europe). Question: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Frequency based on scale points 4-5.

Strategies for digital transformation are crucial for mastering the future of communications. Currently, well-developed approaches for digitalising one or more communication processes are reported by 53.4 per cent of the communication departments and agencies in the Nordic region, while only 28.0 per cent have routines for selecting software and services. These strategies seem to be less

prevalent in the Nordics when compared to the European average. The results of the study further show that two thirds of Nordic communication departments and agencies lack an overall digitalisation strategy for stakeholder communications and seem to struggle with how to use technologies to engage with stakeholders, shape their perceptions and influence desired behaviours.

Strategies and concepts in the Nordics

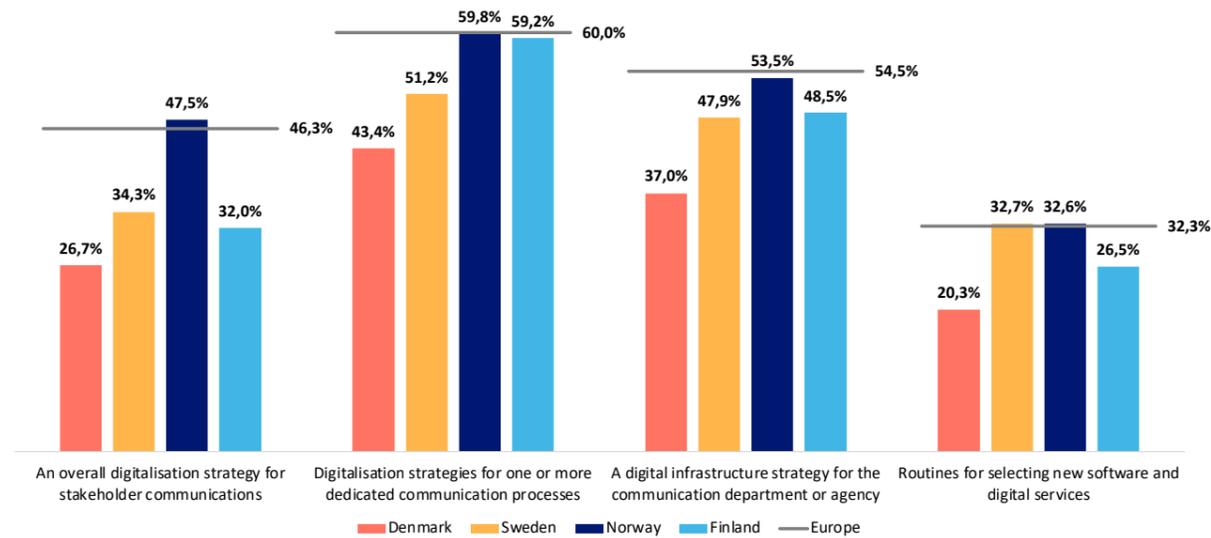


Figure 11. n ≥ 438 (Nordics)/ n ≥ 2,462 (Europe). Question: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Frequency based on scale points 4-5.

Strategies and approaches for the digitalisation of stakeholder communications and for building a digital infrastructure are developed differently in the four Nordic countries. Danish communication departments and agencies show room for improvement in all strategic areas. This becomes particularly clear in respect of an overall digitalisation strategy (26.7%) and routines for selecting new software and digital services (20.3%). Also, Swedish and Finnish communication units struggle with an overall strategy for digitalisation. With regard to the mentioned routines, however, Swedish communicators report a higher level of development than their Nordic colleagues. Norwegian communication units, on the other hand, seem to be as prepared for upcoming digital challenges as the

European average. Nevertheless, digitalisation affects not only technical systems – social systems are relevant as well. In the end, digitalisation is a change process for organisations (Nadkarni & Prügl, 2021). Hence, communication departments and agencies need to take a social-technical perspective (Bostrom & Heinen, 1977) and address several dimensions when going through a digital transformation. The findings of the study show: Strategies for transforming structure (33.7%) or people (33.8%) and especially for modifying tasks (28.2%) are less prevalent than approaches for using technology (40.8%). Again, the data reveal that Danish communication practitioners rate the development of their strategies in all dimensions significantly lower than their Nordic colleagues.

4 The emergence of video-conferencing in stakeholder communications

4.1 The use of video-conferencing

Frequency of video-conferencing in the last year in the Nordics

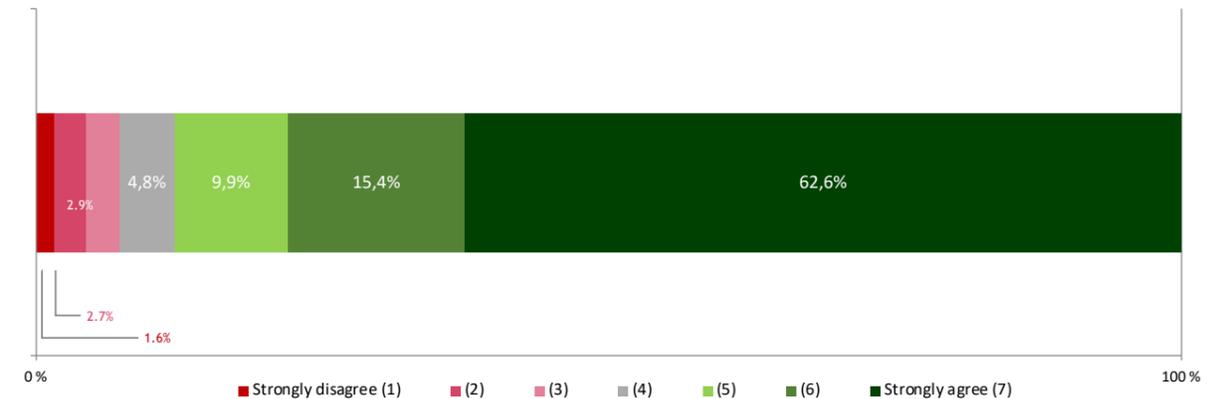


Figure 12. n = 457 (Nordics). Question: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Scale 1 (Strongly disagree) – 7 (Strongly agree).

The Covid-19 pandemic has fundamentally changed the way we are working, collaborating and communicating (Nagel, 2020). For most people, this has meant a significant upswing in remote interactivity and working from home (Bloom et al., 2021). These developments are supported by Zoom, MS Teams, Skype and other tools for video-conferencing (Serhan, 2020). In the communication field, video-conferencing has proliferated well beyond organisational boundaries towards mediating interactions with consumers, potential employees, or journalists. The present study provides indications about the perceived effectiveness of video-conferencing with regard to different aspects of internal and external communication work. The exciting question remains whether video-conferencing will have a long-term impact on the profession and to what extent it is here to stay – even after the pandemic. Our data show that video-conferencing has clearly taken over as a common practice for stakeholder communications during the pandemic, with 89.2 per cent European and 87.9 per cent Nordic communicators using these technologies frequently during the past year. As the study reveals,

however, consultancies and agencies use video-conferencing significantly less often than other organisations.

Of course, this trend ‘from physical to virtual’ has to be understood in relation to specific practical domains, e.g., in the context of consumer events, employee meetings or press conferences: a virtual press conference replaces a site visit or product launch with journalists; and webinars with ‘C-suite’ managers are staged instead of attending physical town hall meetings. 92.5 per cent of European communication departments use video-conferencing frequently for internal communications for informing and engaging employees. In the Nordic region, however, only 70.9 per cent use it for this purpose. Specifically, Danish communicators do not rely heavily on video-conferencing for internal communications (62.3%), whereas Norwegian practitioners report a higher use (78.5%). Interestingly, Nordic practitioners use video-conferencing very frequently for stakeholder dialogues with interest groups, politicians and communities.

Typical usage of video-conferencing in the Nordics

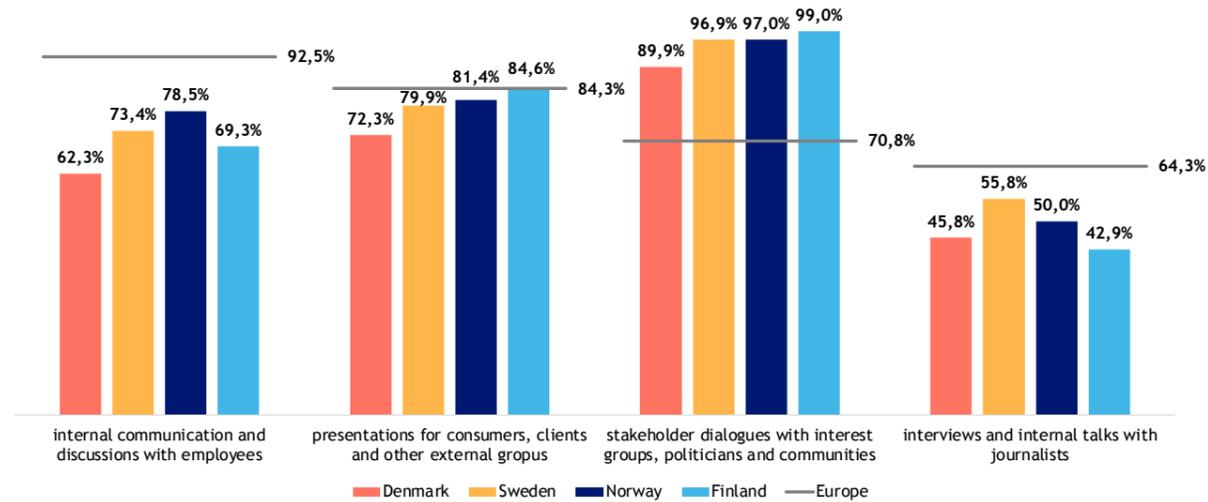


Figure 13. n = 334 (Nordics)/ n ≥ 2,198 (Europe). Question: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Frequencies based on scale points 5-7.

While 'only' 70.8 per cent of the European respondents on average communicate via video-conferencing with their stakeholders, almost 100 per cent of the Finnish communicators benefit from this opportunity. With regard to presentations for consumers, clients and other external groups, the data show that video-conferencing is being used quite similarly by European (84.3%) as well as by Nordic communicators (79.5%). However, there are differences in the application of video-conferencing for interviews and internal talks with journalists: While two thirds of the European communicators talk virtually with journalists, not

even half of the Nordic communicators (48.6%) do this frequently. When looking at the technology being used, we see that in terms of hardware bigger screens and more stationary conference-room and desktop setups (60.7%) are prioritised over smaller, more versatile equipment, such as laptops (36.0%) or smart-phones and tablets (2.0%). On the software side MS Teams is the most popular platform in Europe (49.9%) and even more in the Nordics (68.5%). The user number of Zoom has skyrocketed in the last year, so it is not surprising that this platform is in second place in Europe (28.9%) and in the Nordics (14.0%).

Preferred hardware for video-conferencing in the Nordics

Conference room equipped for virtual meetings	Computer or laptop/notebook with desktop monitor	Laptop/notebook with integrated monitor	Tablet	Smartphone
2.2%	58.5%	36.0%	1.1%	0.9%



Figure 14. n = 455 (Nordics). Question: Which hardware do you use most often for video-conferencing with stakeholders? Frequency based on selection.

4.2 The drivers of using video-conferencing

While the pandemic essentially forced many communicators in many instances to rely on video-conferencing, the pressing question remains about its application in a 'post-Covid' world. When looking at effectiveness, usefulness, and expectations to use video-conferencing, even outside of sheer necessity during the pandemic, a majority of Nordic practitioners see the technology continuously as an effective tool for their communications work (74.6%) and equally expect their stakeholders to share this opinion

(77.6%) – even more than other European practitioners. Interestingly, while most European practitioners also expect significant pressure within their organisations to continue the use of video-conferencing (73.5%), fewer can see their organisation actually offering continued support for such formats (62.0%). This discrepancy is even bigger in the Nordic region as 79.5 per cent report the expectation to use video-conferencing, but only 55.9 per cent hope for support.

Drivers of video-conferencing in the Nordics vs. in Europe

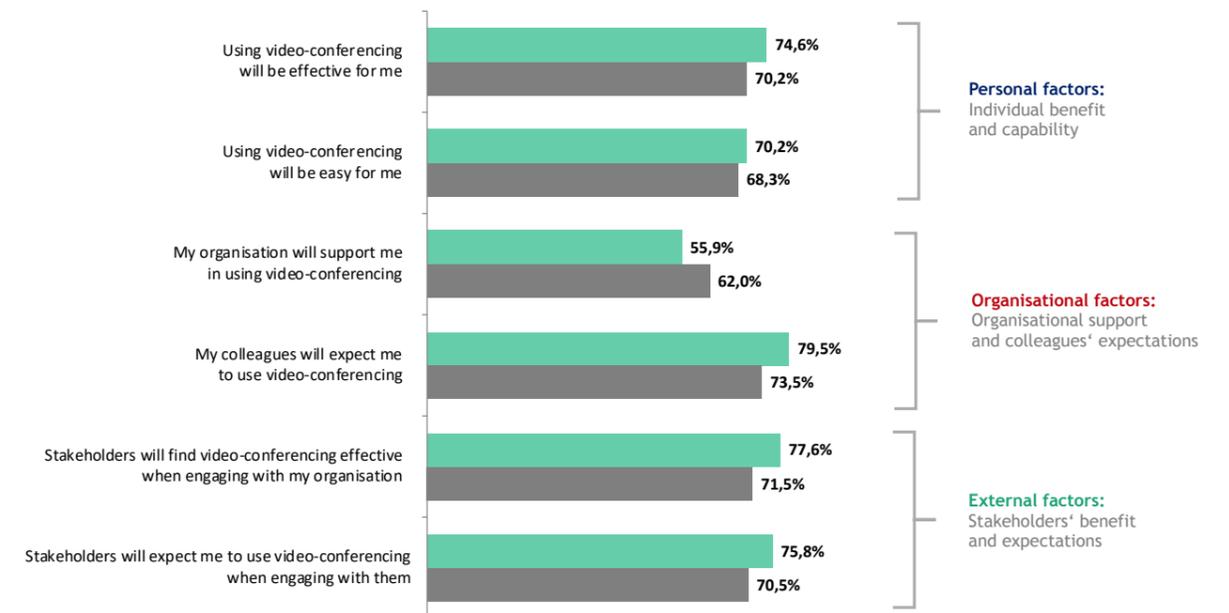


Figure 15. n = 361 (Nordics)/ n ≥ 2,152 (Europe). Question (exemplary items only, for full measures see Zerfass, Buhmann, Tench, Verčič, & Moreno, 2021): We are now interested in your opinions and expectations about the use of video-conferencing after the pandemic. Imagine that all restrictions are lifted and it is in no way mandatory to use video-conferencing: To what extent do you agree with the following statements?: a) I find video-conferencing to be useful for stakeholder communications; b) I receive sufficient support from my organisation for using video-conferencing; c) Key stakeholders (or clients) of my organisation expect me to use video-conferencing on a regular basis during the next year when engaging with them. For each construct, items were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree); an index was constructed based on mean results. Frequencies based on scale points 5-7 for indices.

A closer look at the Nordic countries reveals that particularly Swedish communication professionals find video-conferencing to be effective for them (82.0%) and for their stakeholders (81.2%), but only one in two expects support by their organisation (51.8%). Their Danish colleagues find it less effective for them (62.7%) and not as

easy (59.2%) as the other Nordic communicators. This signals some interesting future tensions between the necessity to consider extant stakeholder practices, preferences, and expectations when choosing communication channel and design (Welch, 2012) on the one hand, and organisational-level support and demands on the other.

Future of video-conferencing (Nordics vs. Europe)

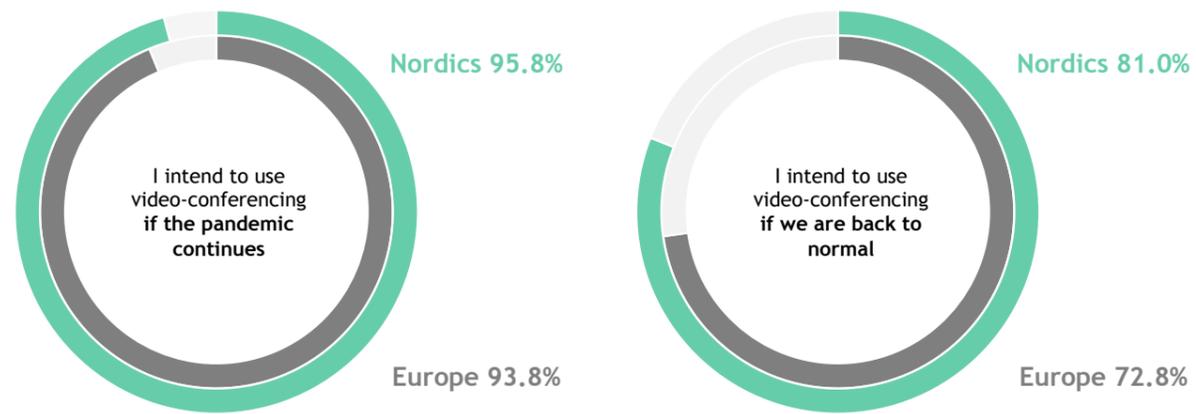


Figure 16. n = 440 (Nordics) / n ≥ 2,885 (Europe). Question: Generally speaking, to what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 7 (Strongly agree). Frequencies based on scale points 5-7.

All in all, this study suggests that video-conferencing is here to stay: 81 per cent of the Nordic practitioners intend to use it for stakeholder communications, even when the pandemic is over. Compared to the European average, the acceptance of video-conferencing is higher in the Nordic

region, but there are also significant differences between the Nordic countries. While Finland, Sweden and Norway definitely intend to use this technology even after the pandemic, Denmark has a significantly lower motivation to continue to use it.



«It is hardly a surprise to see that video-conferencing has been embraced across Europe during the pandemic, but it is interesting to consider that the shift from analogue to digital required a 'mobilizer' of this caliber. Online interaction with stakeholders has been a possibility for years, and digital tools have been promoted repeatedly – with varying success. This shows that change and reform is not to be taken lightly and the emergence of video-conferencing in stakeholder communications should stand as a poster child for every change communication team».

Katrine Grønne
Chairperson K1 Kommunikationsforening

5 Salaries

Every year this study collects data on salaries for communication professionals across Europe. Results show a consistent picture for different categories and regions across the continent. In 2021, nearly one in five respondents in Europe (17.9%) and in the Nordics (17.2%) earn more than 100.000€. On the other hand, nearly every second Nordic practitioner makes between 60.000€ and 100.000€ a year, while only 26.7 per cent of the European average earn that much. One third of the Nordic (33.5%) as well as the European communicators (30.7%) receive 30.000€ up to 60.000€ per year. A similar cohort (25.4%) of European practitioners has an annual income of up to 30.000€, while only 3.3 per cent of Nordic communicators have a similar

salary. Looking closer at the higher salary levels, it is notable that 26.7 per cent of those who earn 100.000€ up to 150.000€ work in private companies. The rest are spread roughly evenly across joint stock companies, governmental organisations and consultancies/agencies. For those communicators who receive between 60.000€ up to 100.000€ we see that almost one in two work in governmental organisations. Another interesting result lies in the variation of compensation according to gender: While 71.6 per cent within the salary band of 60.000€-100.000€ are female, in the upper segment of 100.000€-150.000€ half are female and half are male.

Salaries in the Nordics vs. Europe

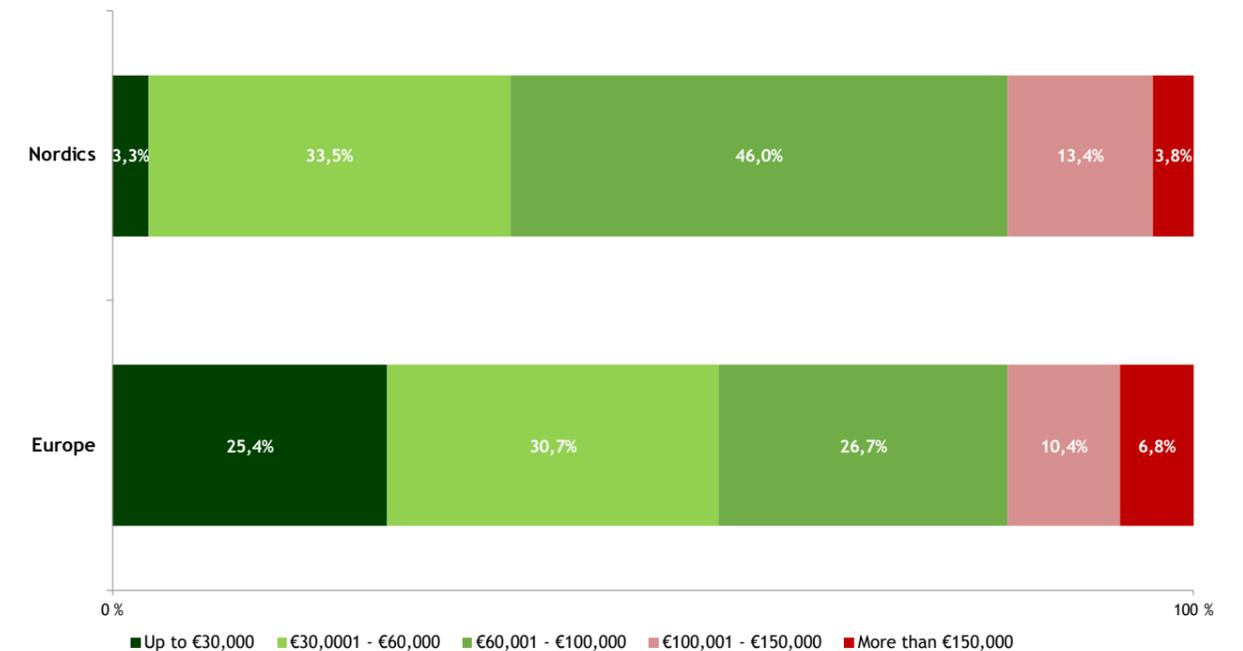


Figure 17. n = 401 (Nordics) / n = 1,970 (Europe). Question: In which of the following bands does your basic annual salary fall? Values not reported in the graphic are below 3 percent.

About The Nordic Alliance for Communication and Management (#NORA)



«Leveraging communication as a strategic driver of sustainable organisational performance and success in a changing world».

Organisations face increasing demands for contributing to solving societal and environmental problems. As a result, the way organisations communicate and engage with stakeholders is rapidly changing. Sustainable organisational performance and success is dependent not only on managers' ability to understand how they relate to their organisations but also on their understanding of the impact of their personal communication along with that of their organisation, both internally and externally. In this sense, management and communication are natural allies.

The Nordic Alliance for Communication & Management (#NORA) brings together leading communication executives with researchers in communication and management

fields from Norway, Denmark, Finland and Sweden to jointly identify emerging trends and topics, develop new research-based knowledge, and shape the debate in the Nordic countries. #NORA enables:

- evidence-based thought leadership at the intersection of communication and management fields.
- close and direct exchange between researchers and research-minded managers.
- immediate access to knowledge and debate as new themes and trends emerge.

Academic and Corporate Partners of The Nordic Alliance for Communication & Management are:

Peggy Simcic Brønn (BI Norwegian Business School), Alexander Buhmann (BI Norwegian Business School), Jesper Falkheimer (Lund University), Finn Frandsen (Aarhus University), Suzanne van Gils (BI Norwegian Business School), Gregor Halff (Copenhagen Business School), Ulrike Haugen (DNV), Winni Johansen (Aarhus University),

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Interested in becoming a partner? Please contact Alexander Buhmann at alexander.buhmann@bi.no

About the European Communication Monitor

This report was produced in collaboration between the Nordic Alliance for Communication & Management (#NORA), the European Communication Monitor (ECM) 2021 and national communication associations of Norway, Denmark, Finland and Sweden. The report has been prepared by Alexander Buhmann (director at #NORA, and researcher at the ECM, Oslo), Ansgar Zerfass (Head Researcher ECM, Oslo/Leipzig) and Jeanne Link (Research Assistant, Leipzig).

#NORA supports the ECM project as a long-standing partner together with other regional partners. This special report is published for the first time in this year and allows dedicated insights on current and future trends of communications in the Nordic region. The European Communication Monitor is known as the largest comparative research project in the field of communication management, corporate communications, public relations and strategic communication worldwide. As an academic study it explores practices and developments of professionally managed communications in companies, non-profits and other organisations including communication agencies across Europe. The study has been conducted annually since 2007.

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. Besides the Nordic Alliance for Communication & Management (#NORA) hosted by BI Norwegian Business School, Oslo, the Center for Strategic Communication (CECOMS) at IULM University, Milan, supports the project as regional partners. The study has been planned and conducted by a core research group of professors at renowned research universities across Europe: Ansgar Zerfass, Alexander Buhmann, Ralph Tench, Dejan Verčič and Ángeles Moreno. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field and different country contexts.

The study follows academic standards of social science research. Concepts, definitions and instruments have been derived from the international body of knowledge, building on theories from various disciplines and previous empirical insights. A research framework has been developed that combines several independent and dependent variables: characteristics of communication professionals (demographics, education, job status, experience); features of the organisation; attributes of communication departments; the current situation regarding the professionals and their organisations; as well as perceptions on developments in the field.

About the Collaborating National Associations

The Swedish Communication Association

is a membership organisation with the vision that communication is recognized as the necessary and strong force that drive change and move companies and society forward. We have some 7000 members working in all sectors throughout Sweden. Our mission is to strengthen the key role of communication in companies and society as a whole. We do this together with practitioners among professional communicators as well as consultants in agencies and with academia. We also offer students membership. We offer a weekly newsletter, competence development, surveys about the profession and need for competence, networking, legal advice and events both local and digital to give an update of the profession in Sweden as well as a globally. We co-operate with universities and support research within the field of communication. www.sverigeskommunikatorer.se/om-oss/in-english

www.kommunikasjon.no/om-oss/english-about-us

ProCom

– the Finnish Association of Communications Professionals – is an organisation for corporate communication, strategic communication, marketing communication and public relations practitioners in Finland. ProCom fosters the professional development of its 2 700 members and promotes the value communication provides to society. Our members range from industry thought leaders working in strategic leadership positions of major corporations to entry-level practitioners and entrepreneurs.

www.procom.fi/english/

K1 Kommunikationsforening

is a community of professional communicators in Denmark. Our mission is to raise the professionalism and reputation of the profession by bringing together communicators and facilitate professional knowledge sharing and dissemination for the benefit of industry and society in general. We do so through talks, events and workshops, as well as writing and publishing articles and whitepapers. The association has over 300 members who are employed at organisations such as Gyldendal, Resonans Kommunikation, Righospitalet, Roskilde University and CBS.

www.k1kommunikationsforening.dk

The Norwegian Communication Association

(Kommunikasjonsforeningen) is an interest organisation for communication professionals Norway. The approximately 4200 members work in both private and public sector, and some are students. The Norwegian Communication Association's main goals are to work for the advocacy for the profession, transparency in society, and to strengthen the members' qualifications. The association has ten local and three student branches, and organises a vast number of courses and events every year. In addition the association publish the magazine "Kommunikasjon" and the podcast "Kommunikasjonspodden".

www.kommunikasjon.no/

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