



# WELCOME TO BI'S CENTRE FOR CORPORATE COMMUNICATION

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HANDELSHØYSKOLEN







# INSIGHTS FROM THE 2018 EUROPEAN COMMUNICATION MONITOR

25.9.2018

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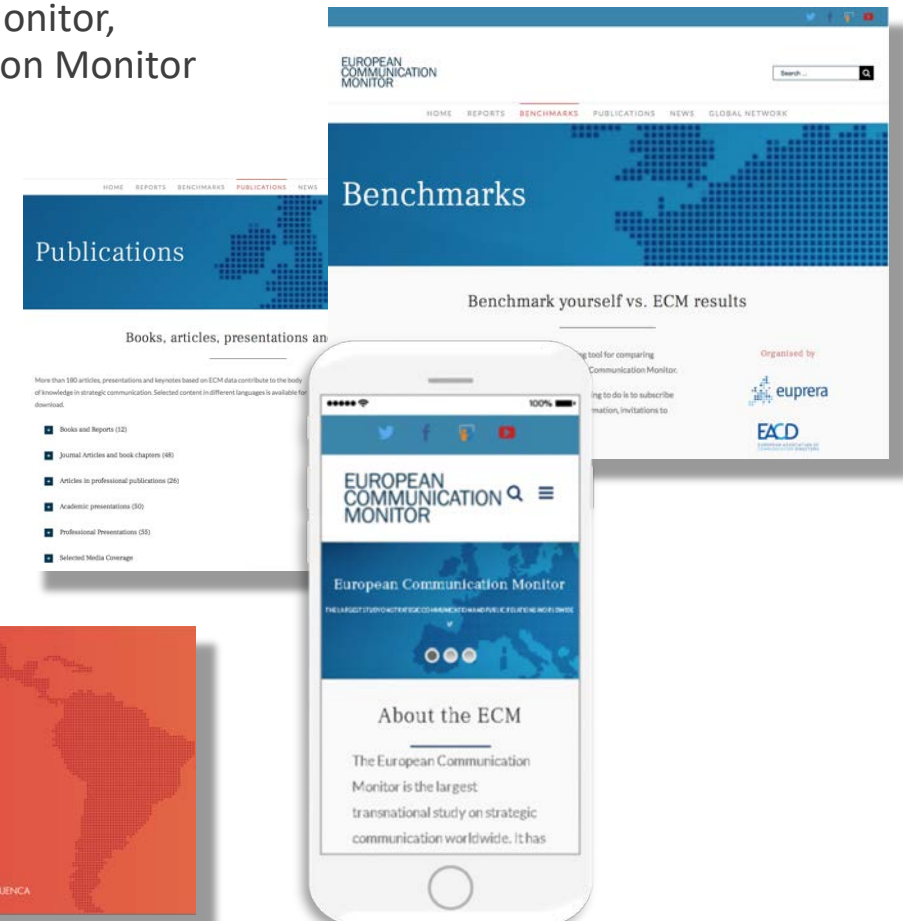
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EUROPEAN  
COMMUNICATION  
MONITOR  
2018

## Global Communication Monitor

- Largest study series worldwide exploring the status quo and trends in strategic communication and communication management across five continents and more than 80 countries; since 2007
- European Communication Monitor (annually), Asia-Pacific Communication Monitor, Latin American Communication Monitor; *new*: North American Communication Monitor
- Research team and national collaborators from renowned universities
- BICCC is national partner for Norway
- [www.communicationmonitor.eu](http://www.communicationmonitor.eu)

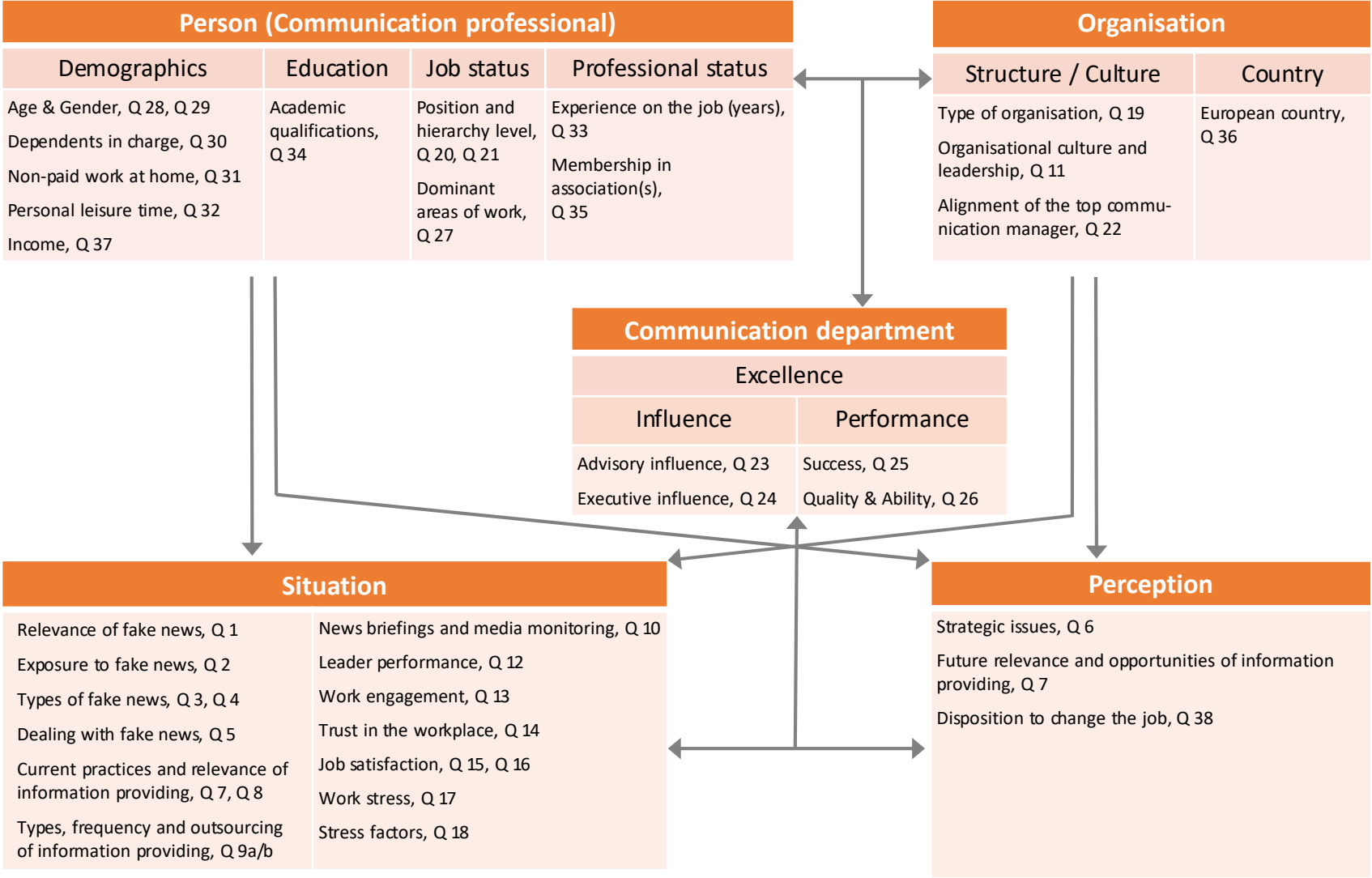





## Research Design and Method







Research framework and questions



Demographic background of participants: Europe and Norway

Position	EUR	
Head of Communication, Agency CEO	36.8%	33.7%
Responsible for single communication discipline, Unit leader	30.4%	23.9%
Team member, Consultant	27.7%	34.8%
Other	5.1%	7.6%

Job experience	EUR	
More than 10 years	65.3%	68.5%
6 to 10 years	17.0%	23.9%
Up to 5 years	17.7%	7.6%

Organisation	EUR	
Communication department in a		
▪ joint stock company	20.9%	13.0%
▪ private company	22.7%	19.6%
▪ government-owned, public sector, political organisation	19.0%	43.5%
▪ non-profit organisation, association	10.8%	7.6%
	73.4% EUR	
	83.7% 	
Communication consultancy, PR agency, freelance consultant	26.6%	EUR
	16.6%	

n = 3,096 communication professionals (n = 92 Norway)

Respondents are based in 48 European countries

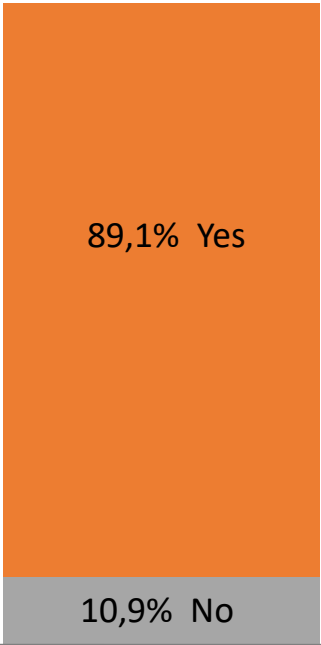


## Information provision for decision-makers

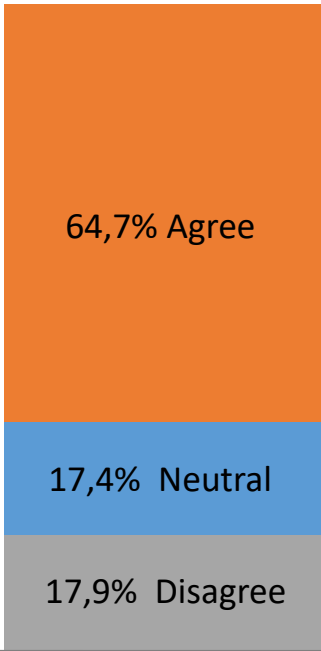


Providing information to decision-makers is a common practice in communication departments/agencies, but only two thirds consider it a core task

*Information is delivered to top management and/or (internal) clients*



*Information providing is a core task for the department/agency*

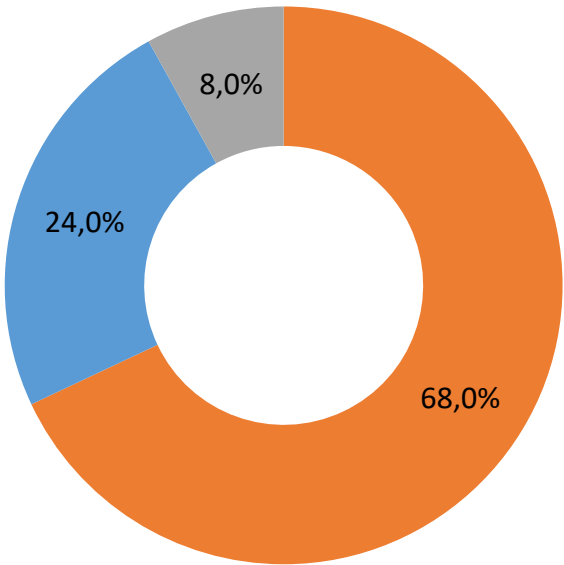




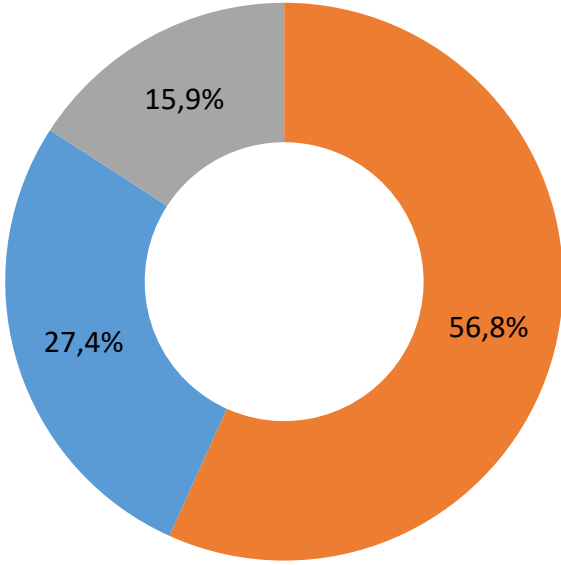
The majority of professionals agree that information providing helps to gain recognition and position communications – it will thus become more important

*Providing information for decision-makers ...*

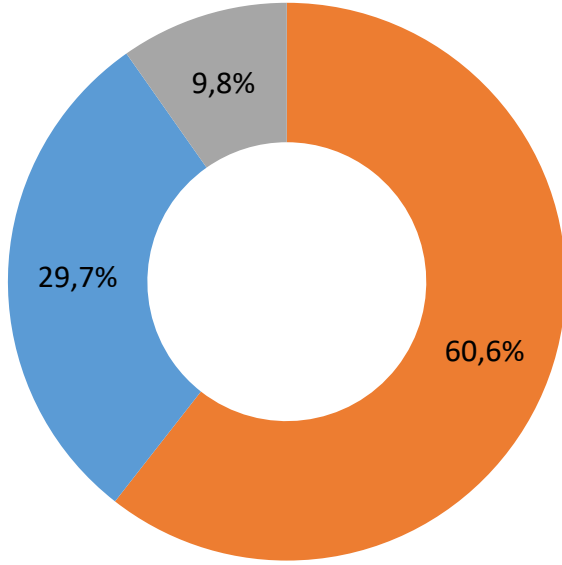
offers great opportunities to gain recognition from top management and (internal) clients



offers great opportunities to position ourselves against other departments/agencies



is gaining in relevance for our department/agency

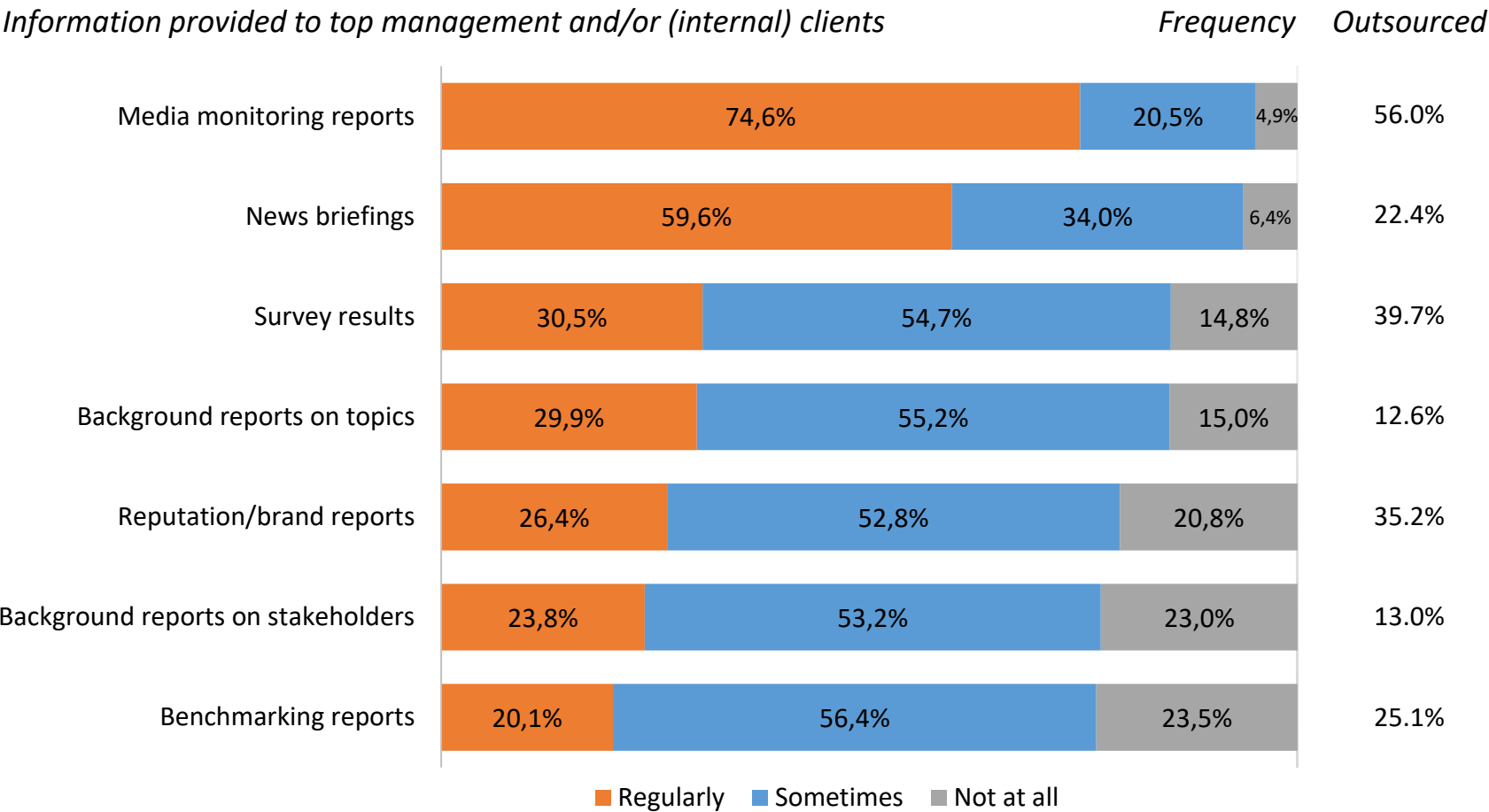


Agree


Neutral

Disagree

Various reports provided to decision-makers:  
Key ones are for monitoring social and mass media (and these are outsourced)



## Types of reports provided to top management: Nordics vs. European Averages

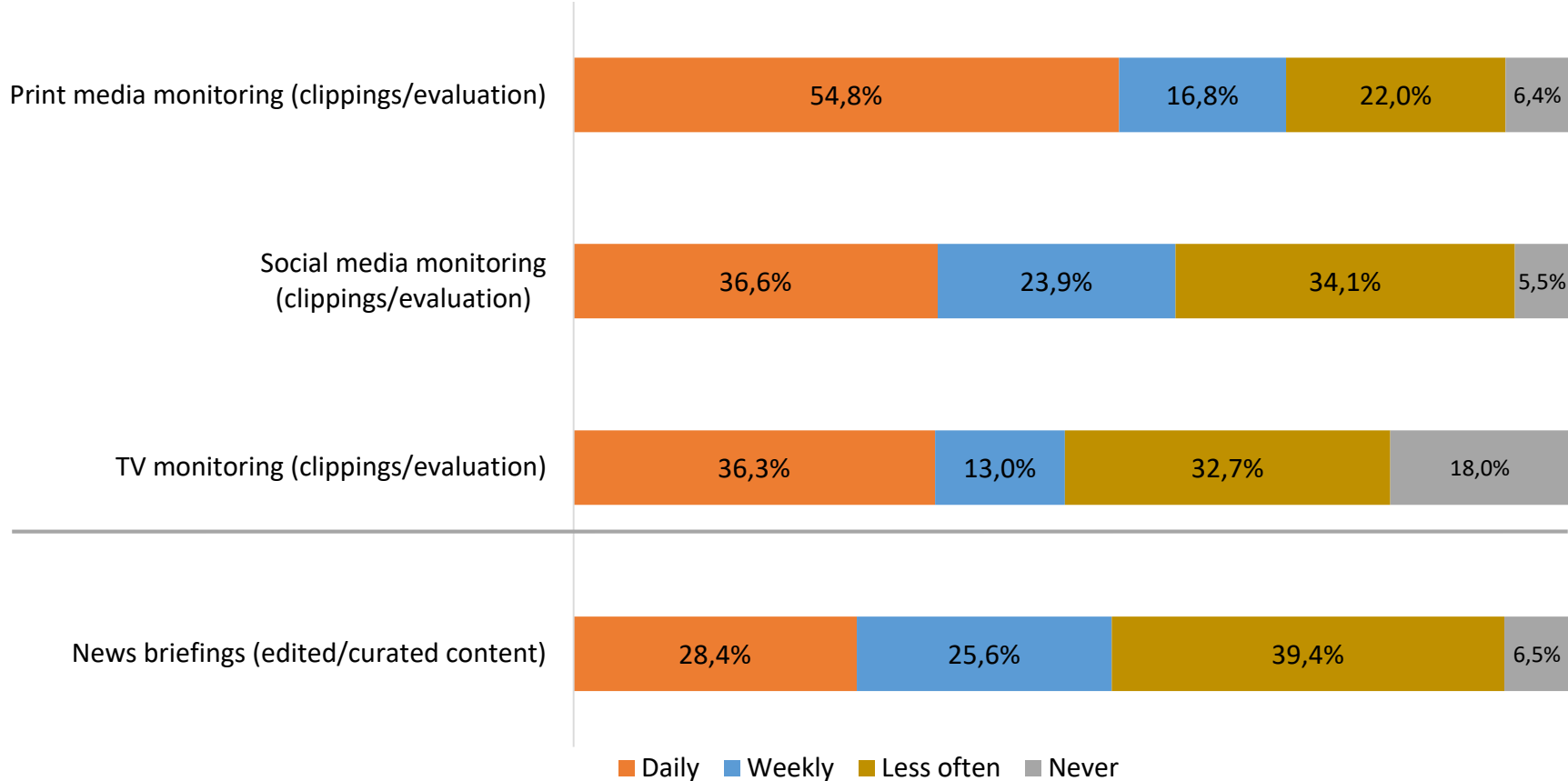
	Media monitoring reports		News briefings		Survey results		Background reports on topics		Reputation/brand reports		Background reports on stakeholders		Benchmarking reports	
	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced
Europe	74.6%	56.0%	56.0%	22.4%	30.5%	39.7%	29.9%	12.6%	26.4%	35.2%	23.8%	13.0%	20.1%	25.1%
Denmark	72.9%	61.0%	61.0%	15.3%	30.5%	37.3%	20.3%	10.2%	18.6%	49.2%	15.3%	13.6%	22.0%	37.3%
Sweden	75.7%	57.3%	64.1%	28.2%	34.0%	33.0%	14.6%	7.8%	26.2%	34.0%	13.6%	7.8%	17.5%	17.5%
Norway 	69.0%	51.7%	59.8%	27.6%	<u>23.0%</u>	<u>37.9%</u>	28.7%	8.0%	<u>16.1%</u>	<u>42.5%</u>	19.5%	9.2%	<u>11.5%</u>	<u>21.8%</u>
Finland	73.8%	72.8%	53.4%	21.4%	46.6%	46.6%	17.5%	18.4%	32.0%	62.1%	14.6%	15.5%	16.5%	21.4%

Norway: Comparatively lower levels of use of surveys, reputation/brand and benchmarking reports




Up-to-date information is mostly restricted to the discourse in print media; social media monitoring and curated news briefings are less common

*Frequency of monitoring reports and news briefings*



## Weekly or daily provision of media monitoring and news briefings: Nordics vs. European Averages

	Print media monitoring	Social media monitoring	TV monitoring	News briefings
Europe	87.3%	61.9%	69.8%	69.8%
Denmark	65.5%	60.0%	53.7%	50.0%
Sweden	68.0%	58.5%	<u>48.9%</u>	54.8%
Norway 	<u>84.1%</u>	54.9%	<u>48.1%</u>	55.6%
Finland	68.4%	<u>75.8%</u>	<u>40.6%</u>	42.7%

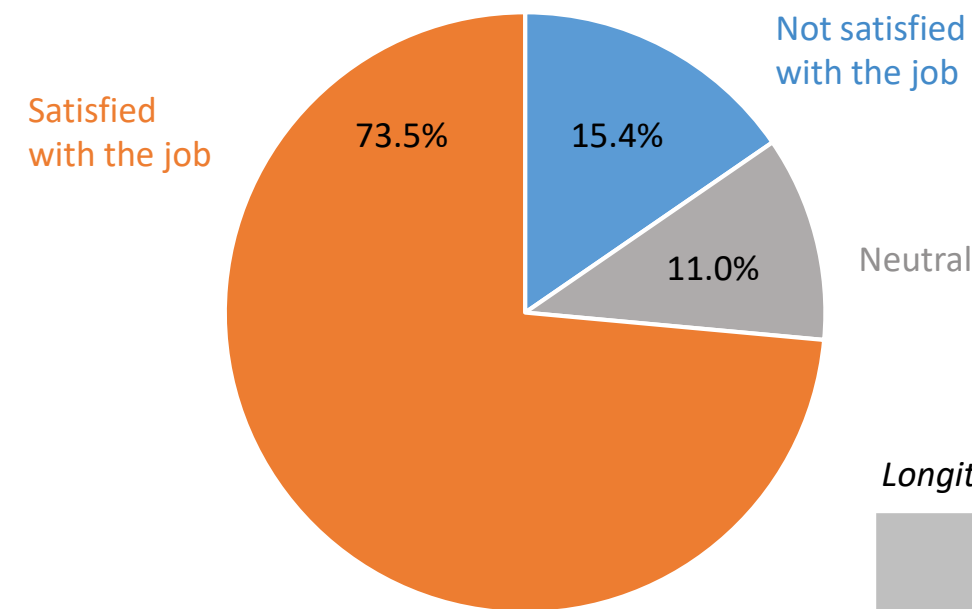
## Job satisfaction and willingness to change





Overall job satisfaction: Three quarters of the communication professionals in Europe are happy at work; however satisfaction is slowly declining over time

Job satisfaction in 2018

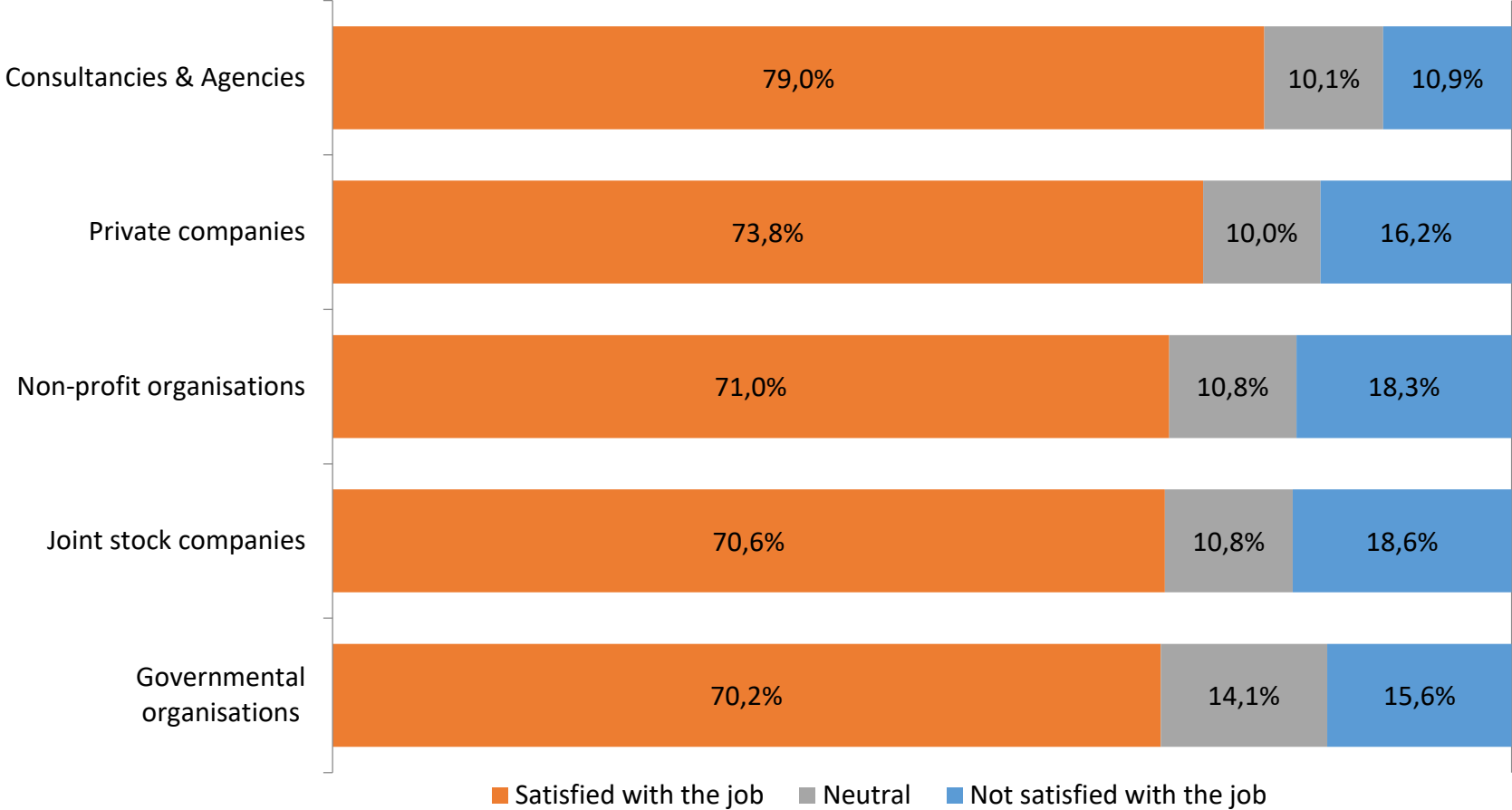


Longitudinal comparison

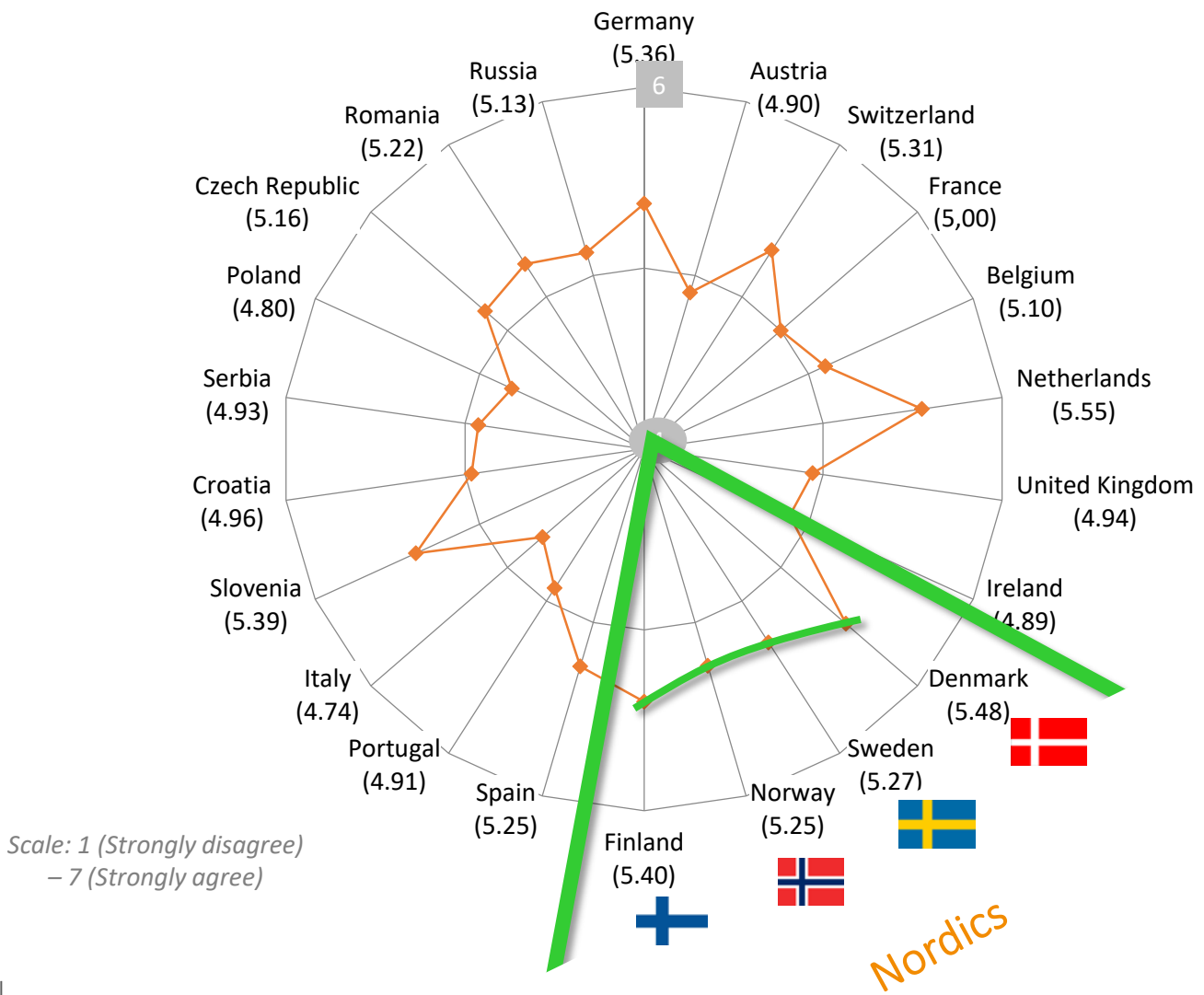
	2010	2014	2018
Job satisfaction	5.33	5.27	5.15

Scale: 1 (Strongly disagree) – 7 (Strongly agree). Mean values.

Practitioners working in consultancies are to a greater extent satisfied, while most unhappy colleagues can be found in non-profits and listed companies

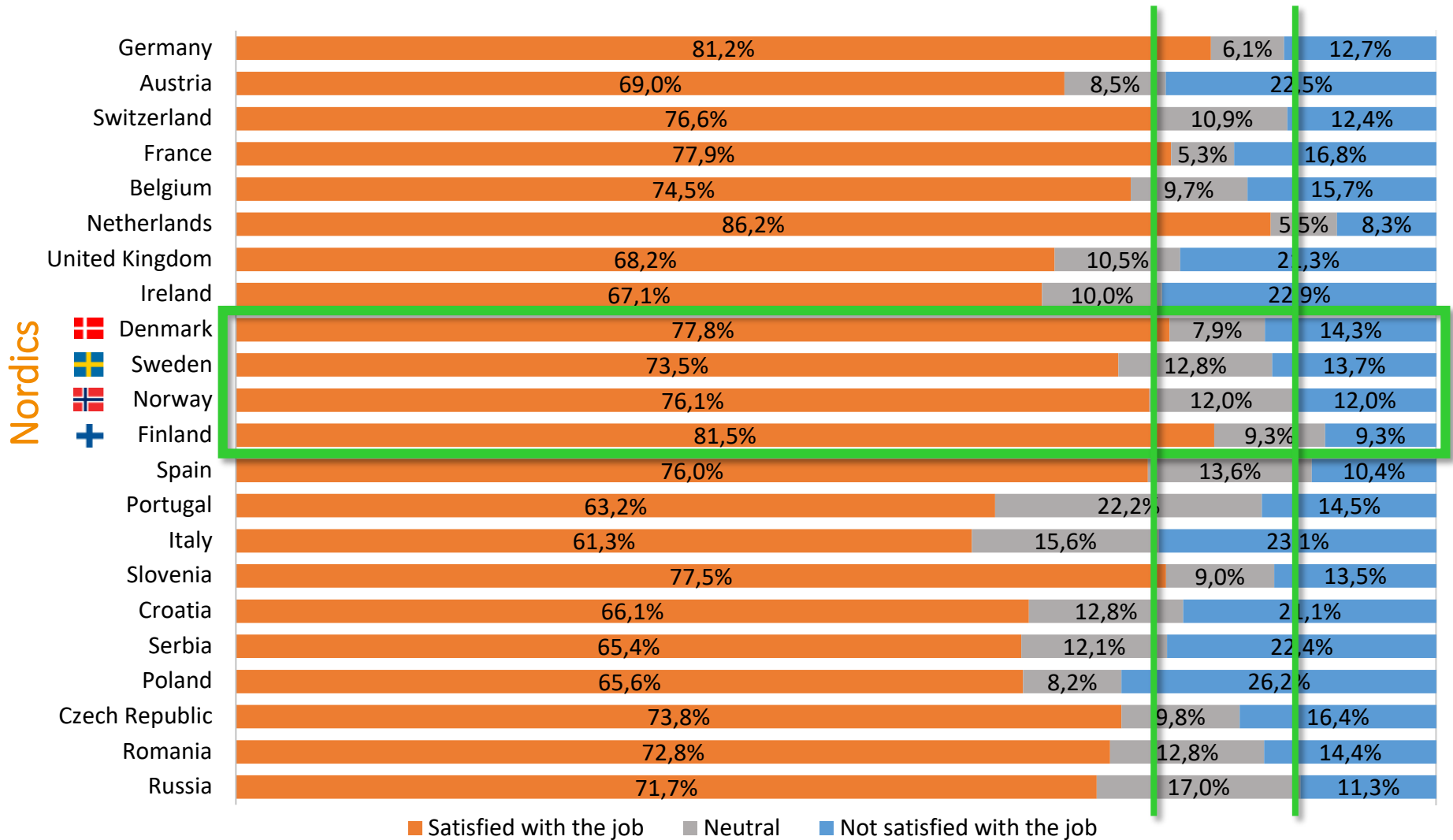


Job satisfaction of communication professionals across Europe: Nordics rank high

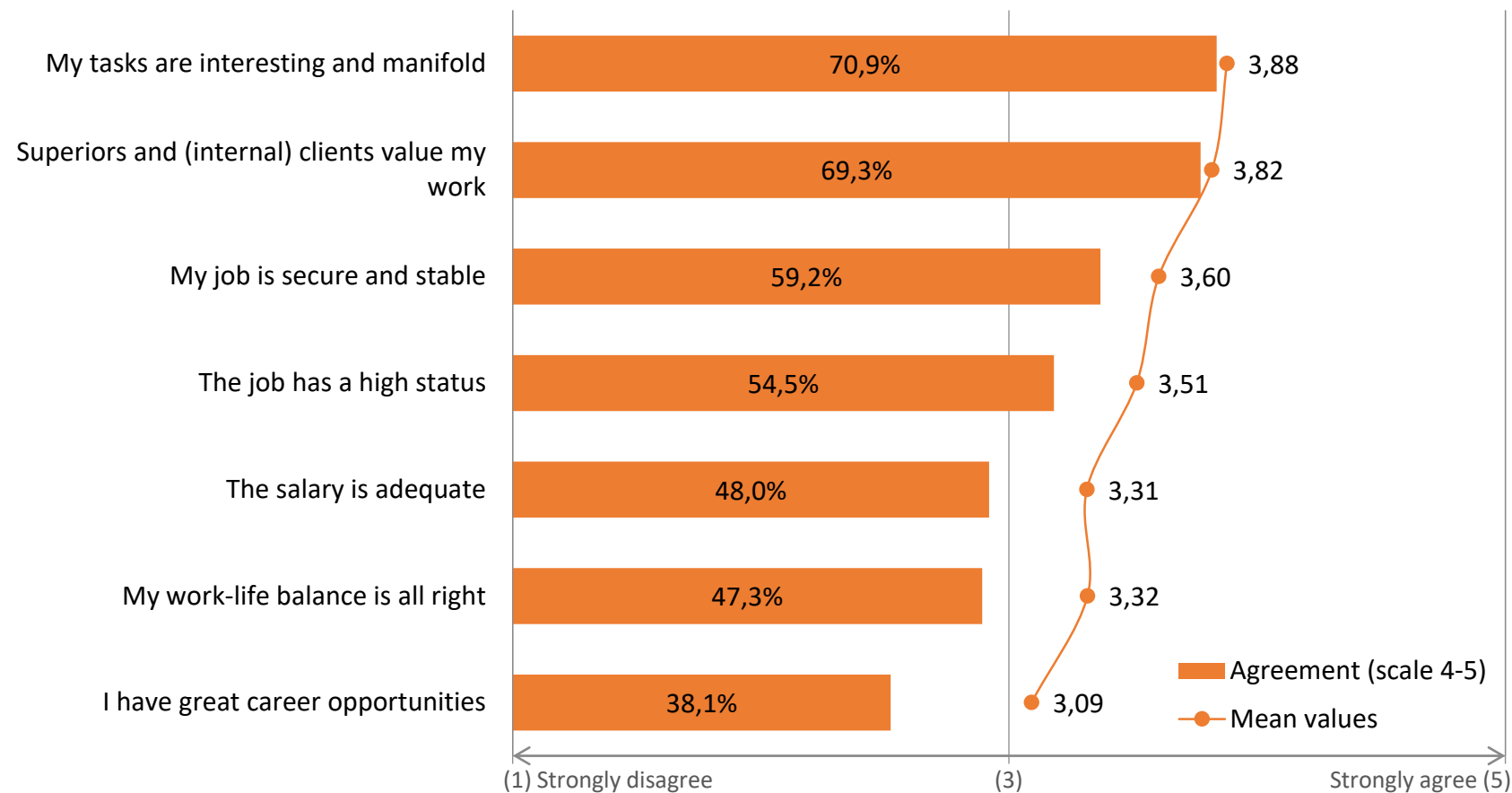




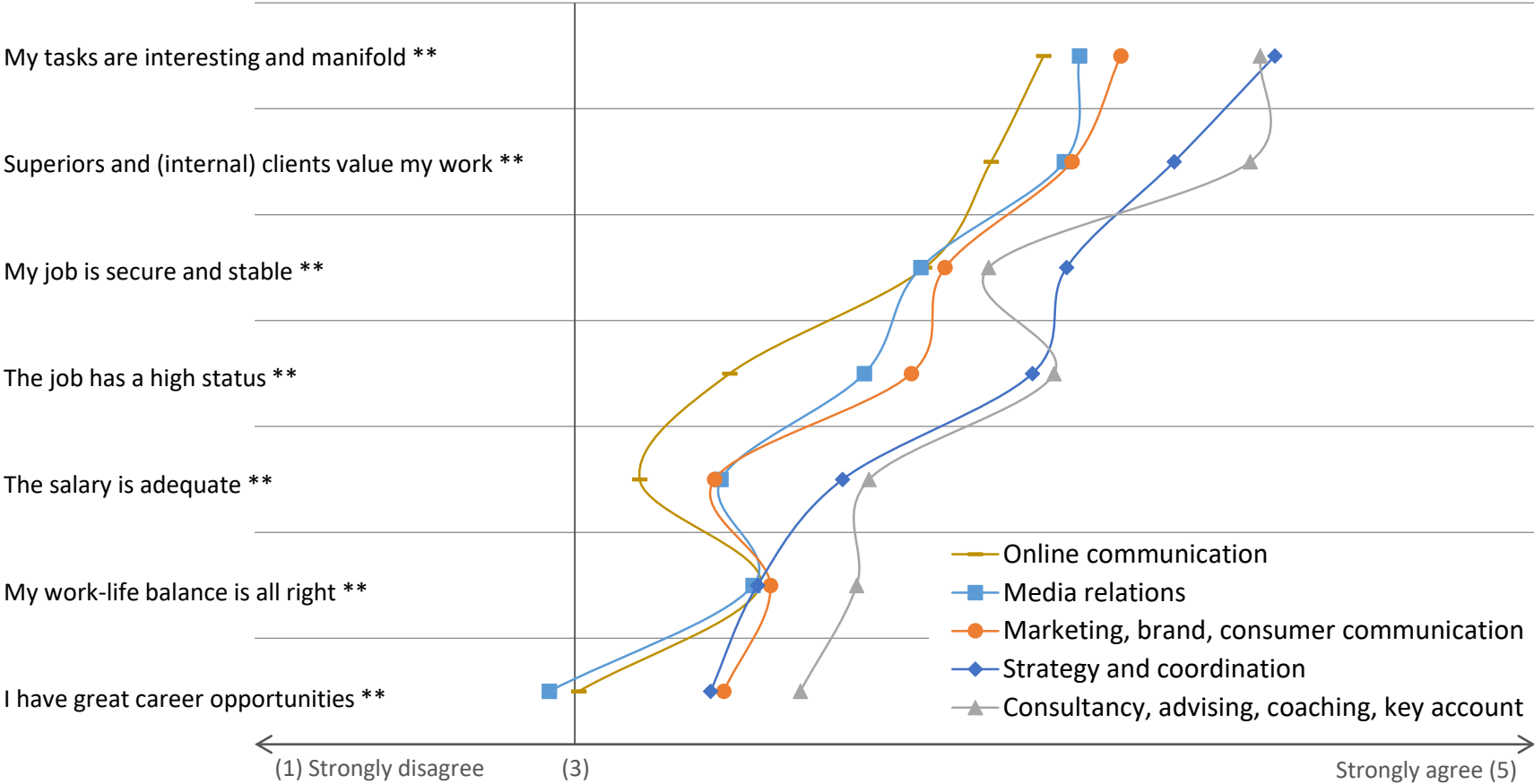
Overall job satisfaction of communication professionals: Norway has one of the largest “satisfied” and one of the smallest “not satisfied” cohorts in the job force



Dimensions of job satisfaction: Communication professionals enjoy an interesting job – but career opportunities and work-life-balance are often criticised



Professionals working in online, media relations and marketing communication are less satisfied than colleagues specialized in strategy and consulting





## Strong and weak drivers of job satisfaction for communication professionals



Strong correlation between job satisfaction and willingness to change



## Characteristics of excellent communication departments



## Benefits of benchmarking communications

*» As communicators, we compete for resources. We have to justify our contribution to the success of the company and defend budgets. Benchmarking helps above all to create greater transparency in costs and employee structures. This supports discussions with top management and management consultants, internal audits, and leading the communication department. «*



Dr. Christoph Zemelka  
Senior Vice President Corporate Communications,  
Brand Management and Sustainability  
Robert Bosch



## Benchmarking

... is “a systematic and continuous measurement process; a process of continuously measuring and comparing an organisation’s business process against business leaders anywhere in the world to gain information which will help the organisation to take action to improve its performance”

(Watson, 1993, p. 258; see also EFQM, 2015; Lema & Price, 1995).

Identifying excellent communication departments

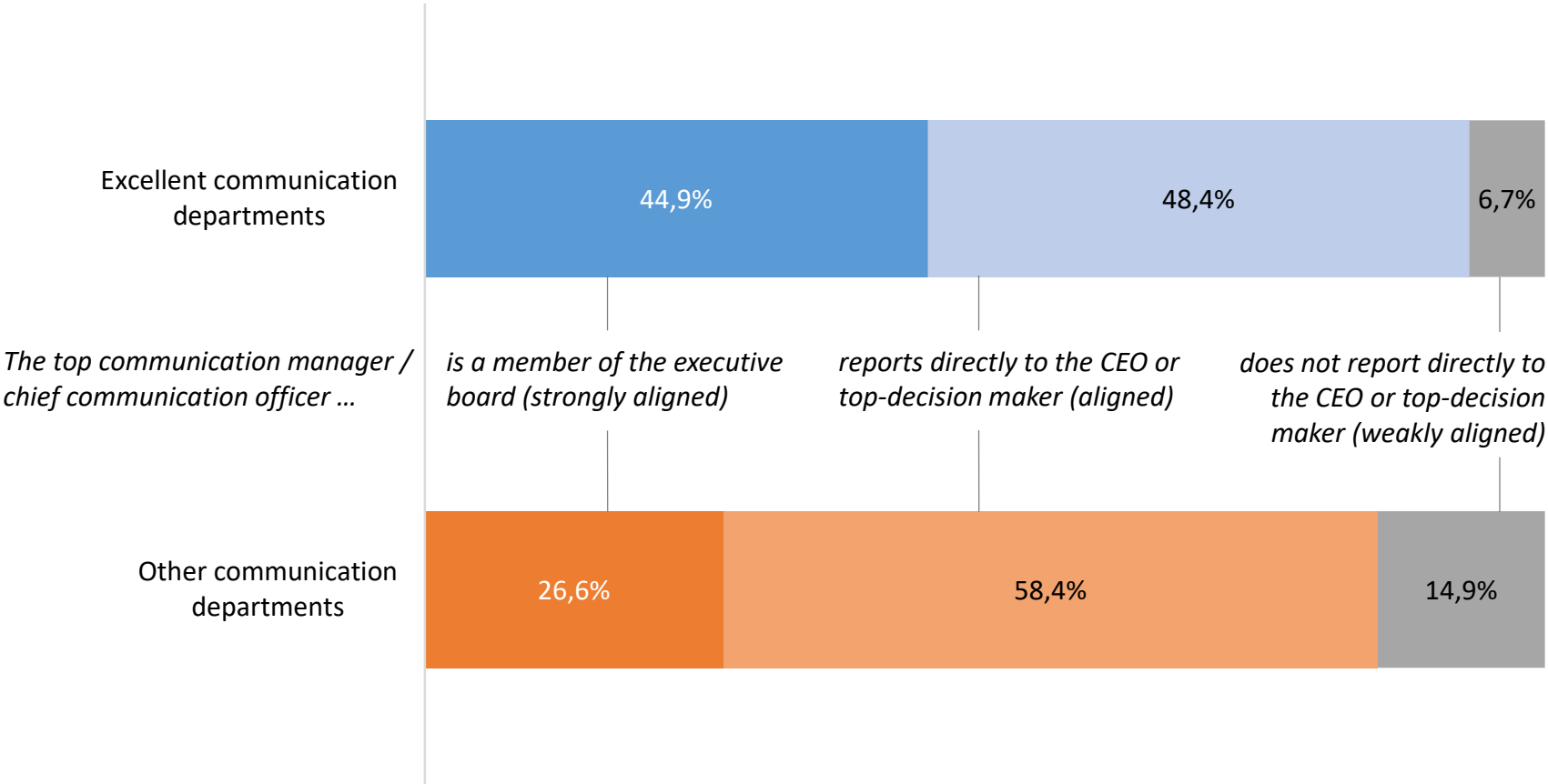
17.7% of comms departments  
in the study are qualified as  
“excellent”

 = 14.6%

*The Comparative Excellence Framework uses statistical analyses to identify outperforming organisations, based on benchmarking and self-assessments known from quality management*

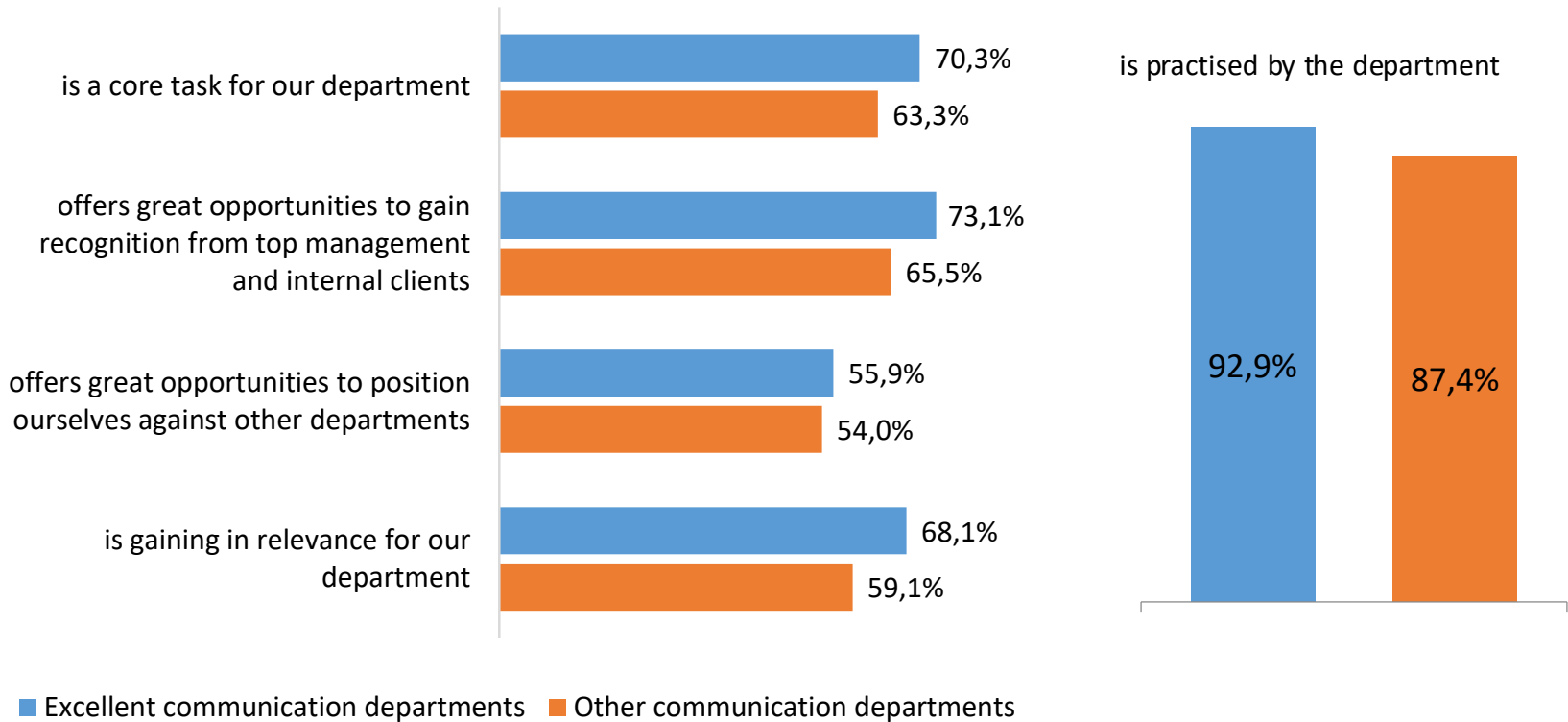


Alignment of communications to top management:  
Significant differences between excellent and other departments



Excellent communication departments are delivering value by providing information to top management

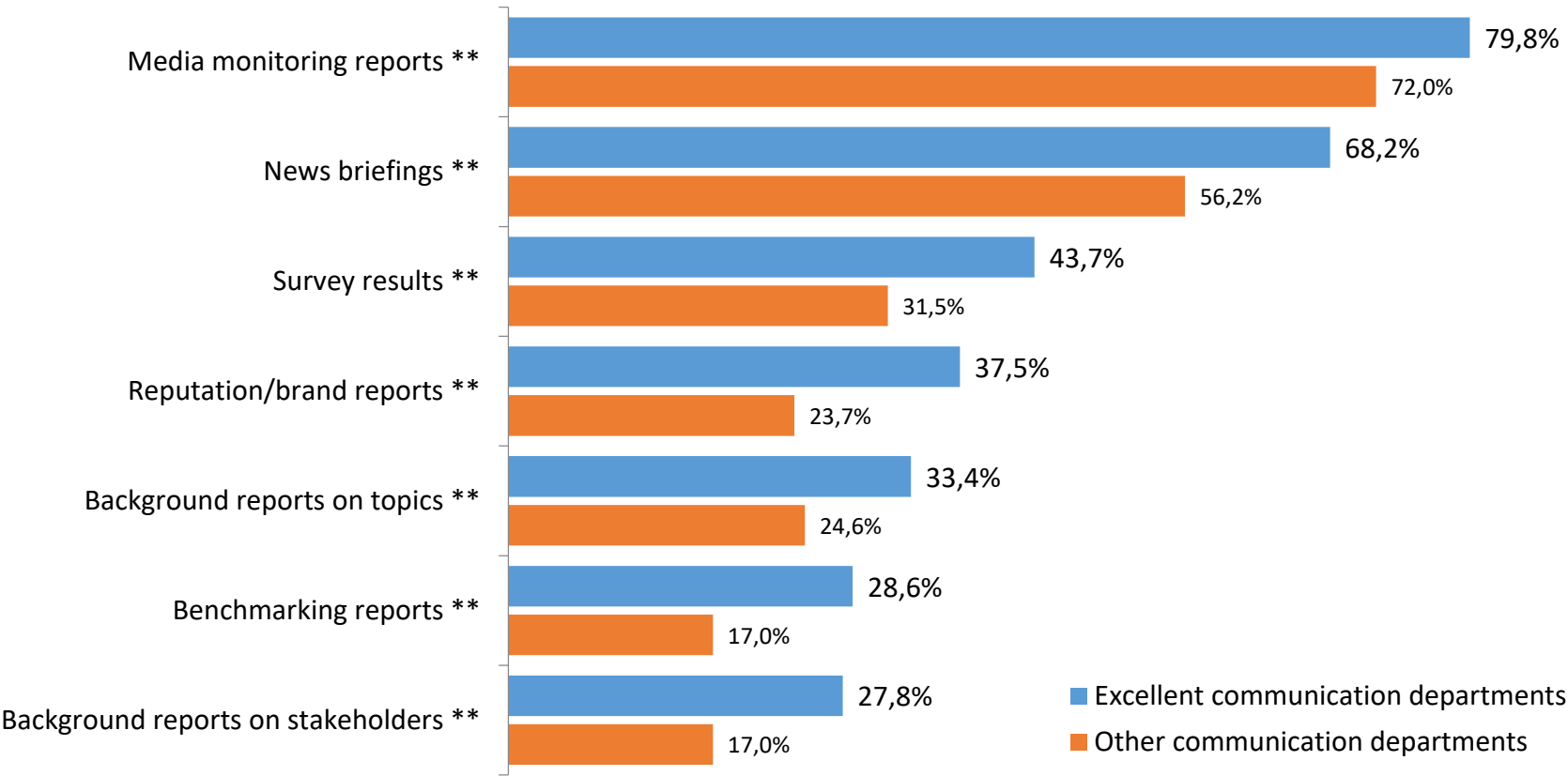
*Providing information for decision-makers ...*



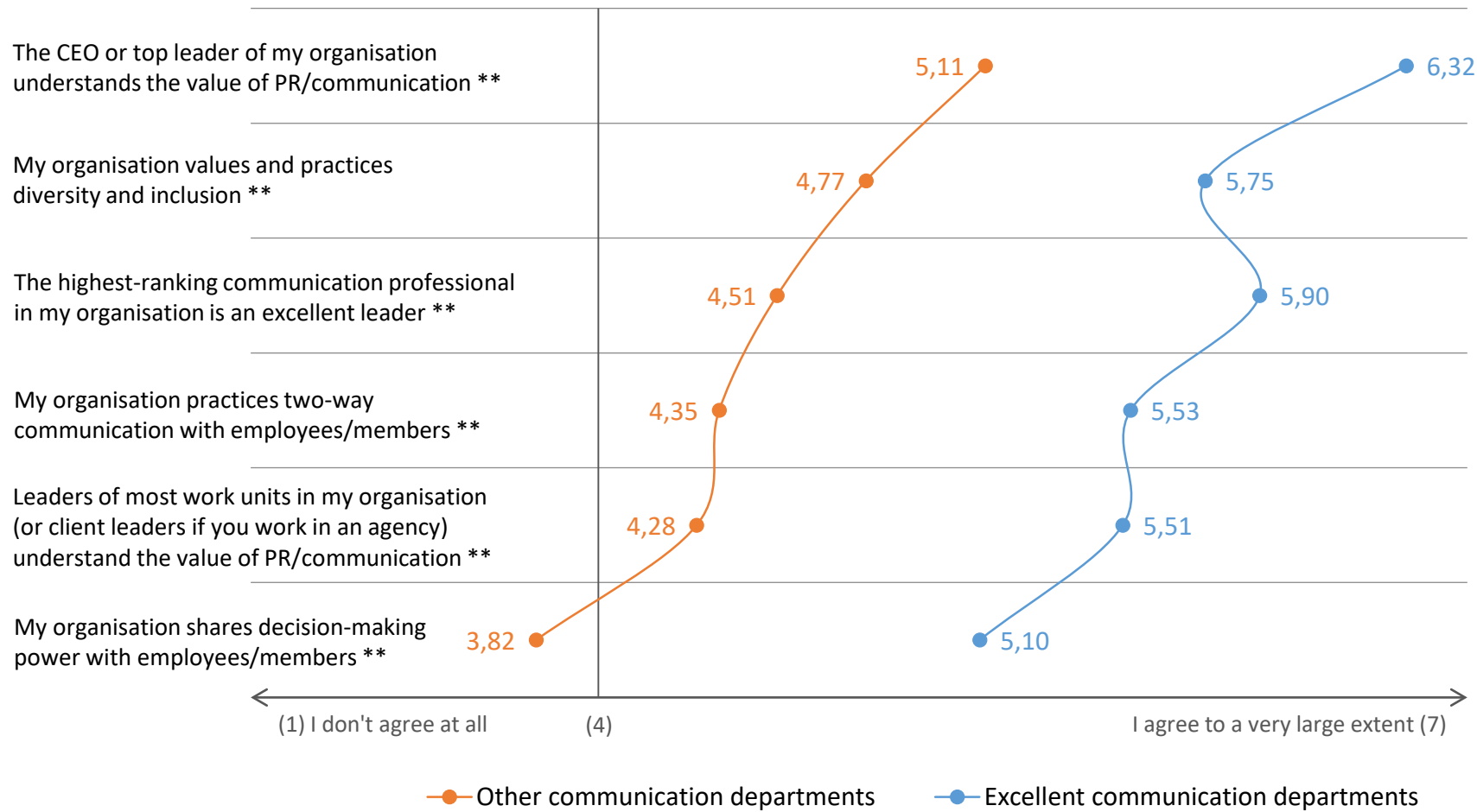


Excellent communication departments offer all kinds of management reports more frequently

Information frequently provided to top management and/or internal clients

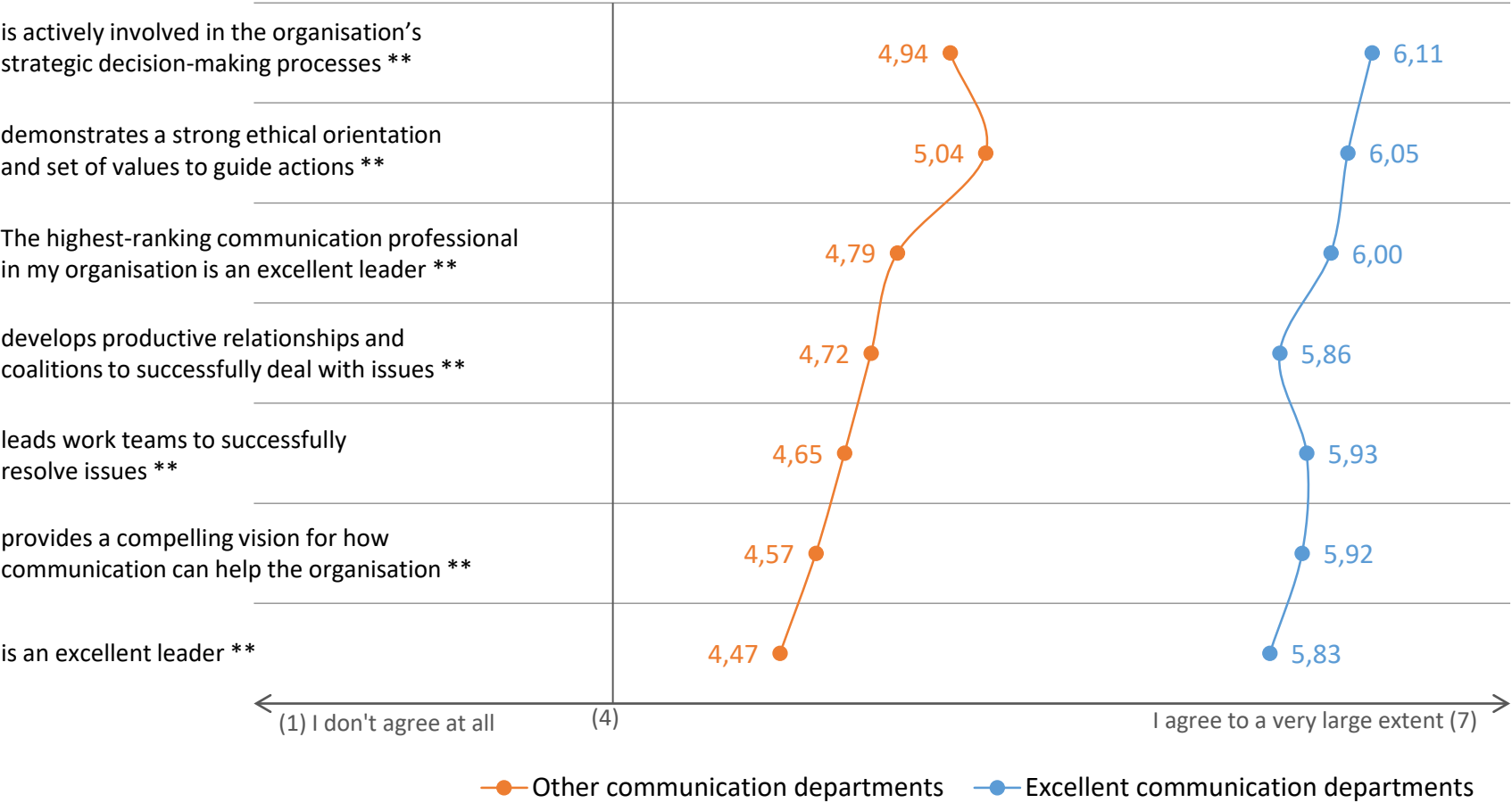


Excellent communication departments are embedded in organisations with great leadership and culture

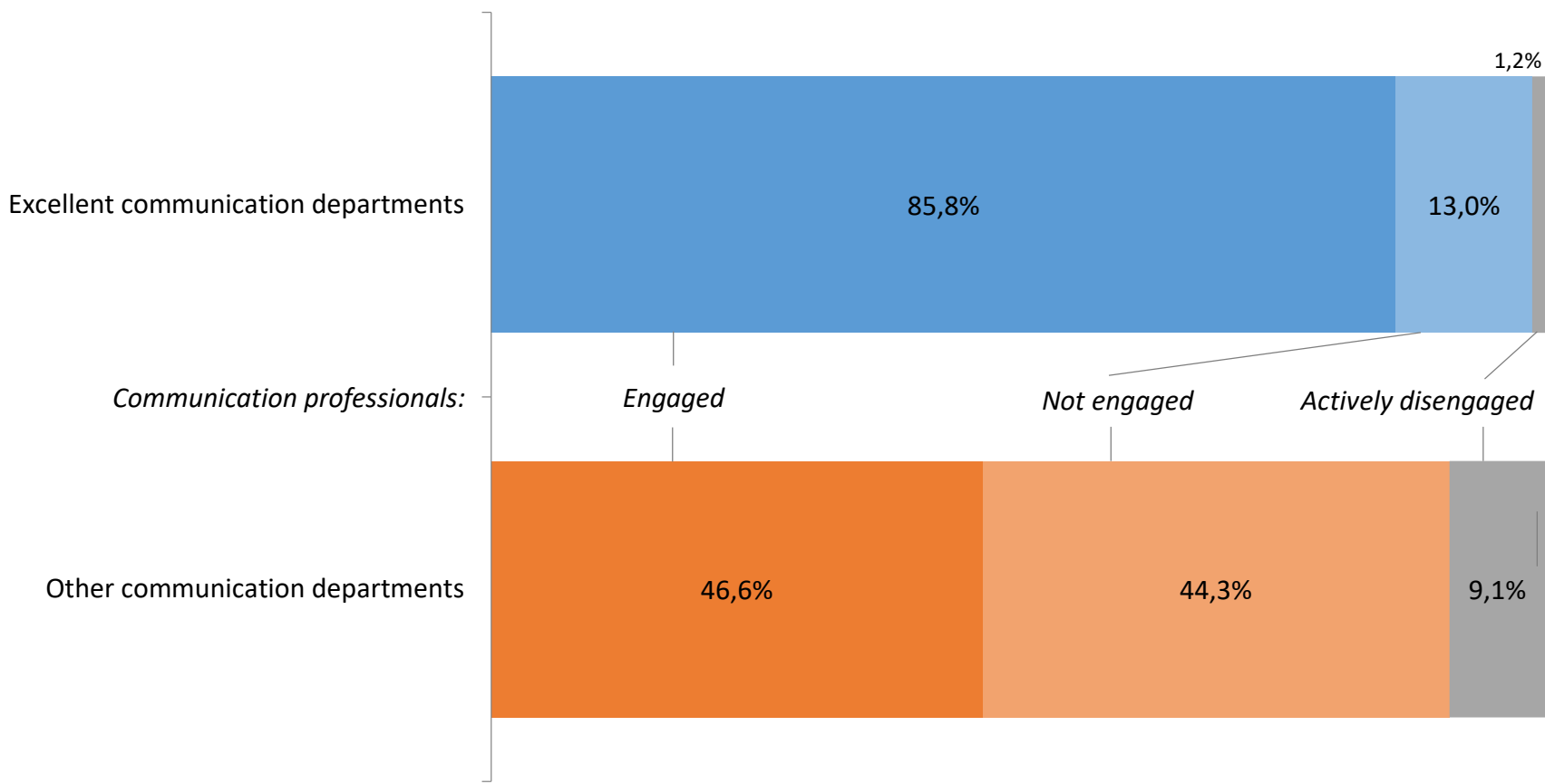


Leadership performance is better in excellent communication departments

*The highest ranking communication professional in the work group, unit or function ...*

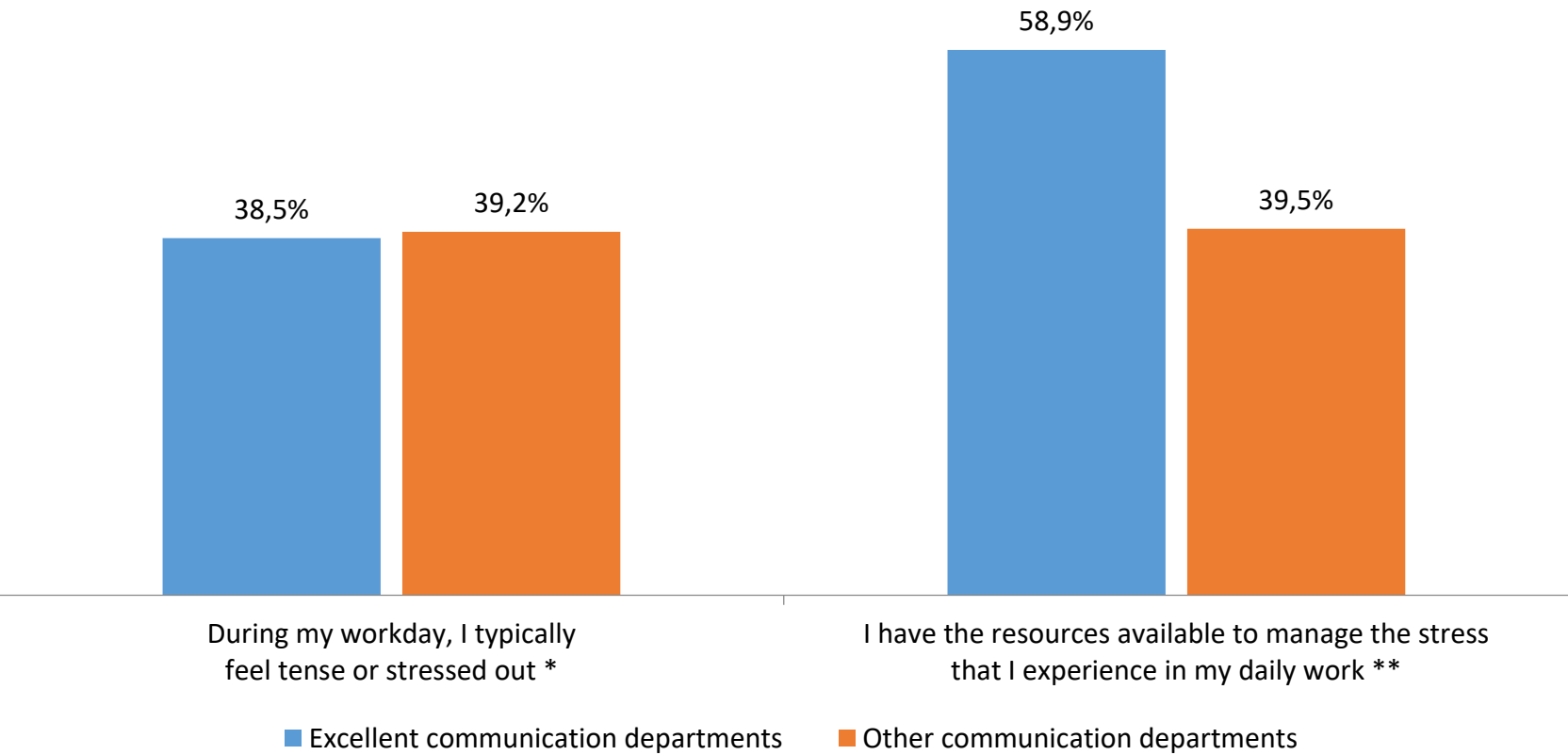


Professionals working in excellent communication departments are more deeply engaged than peers in other departments

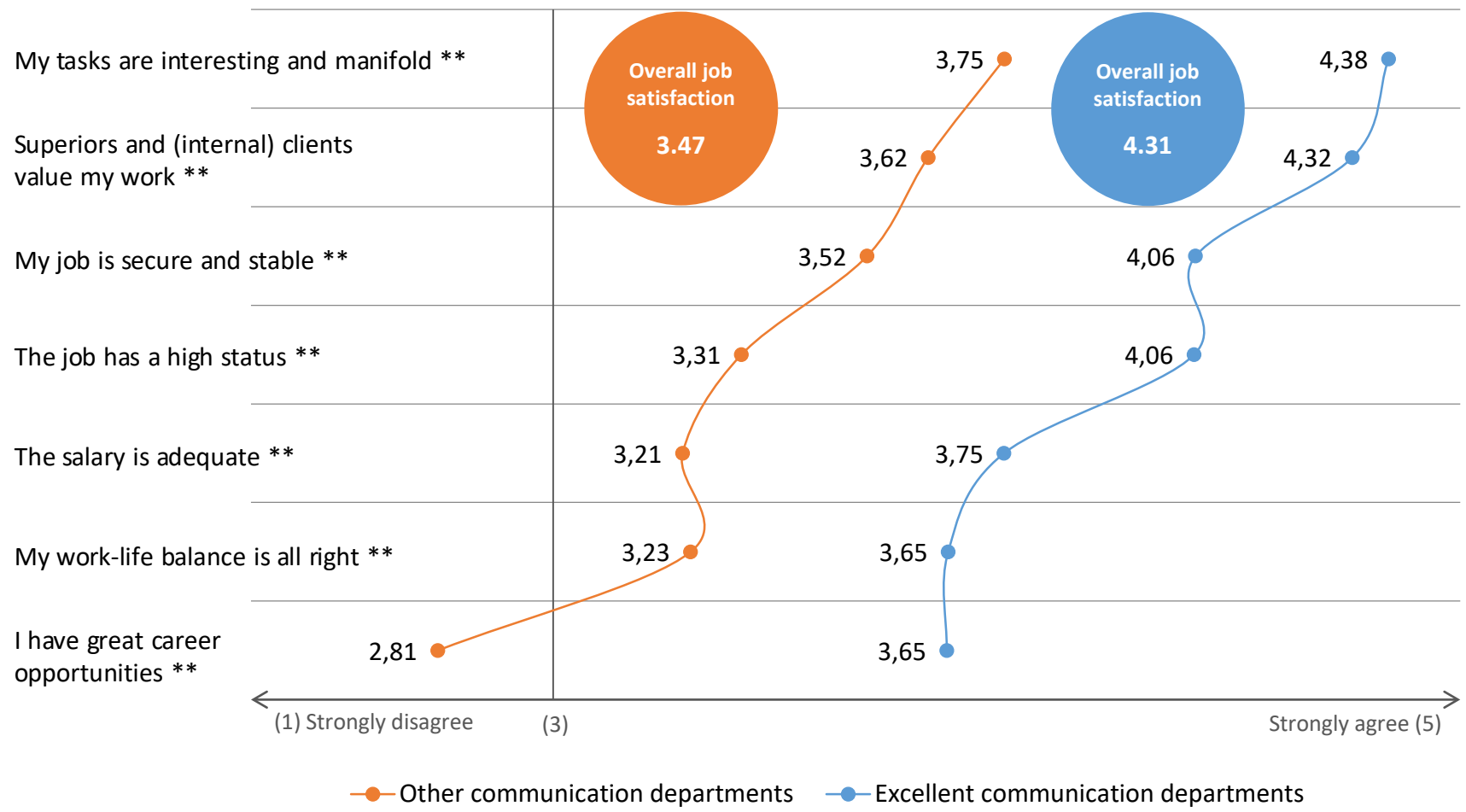




Excellent communication departments are better in enabling practitioners to manage their daily stress at work

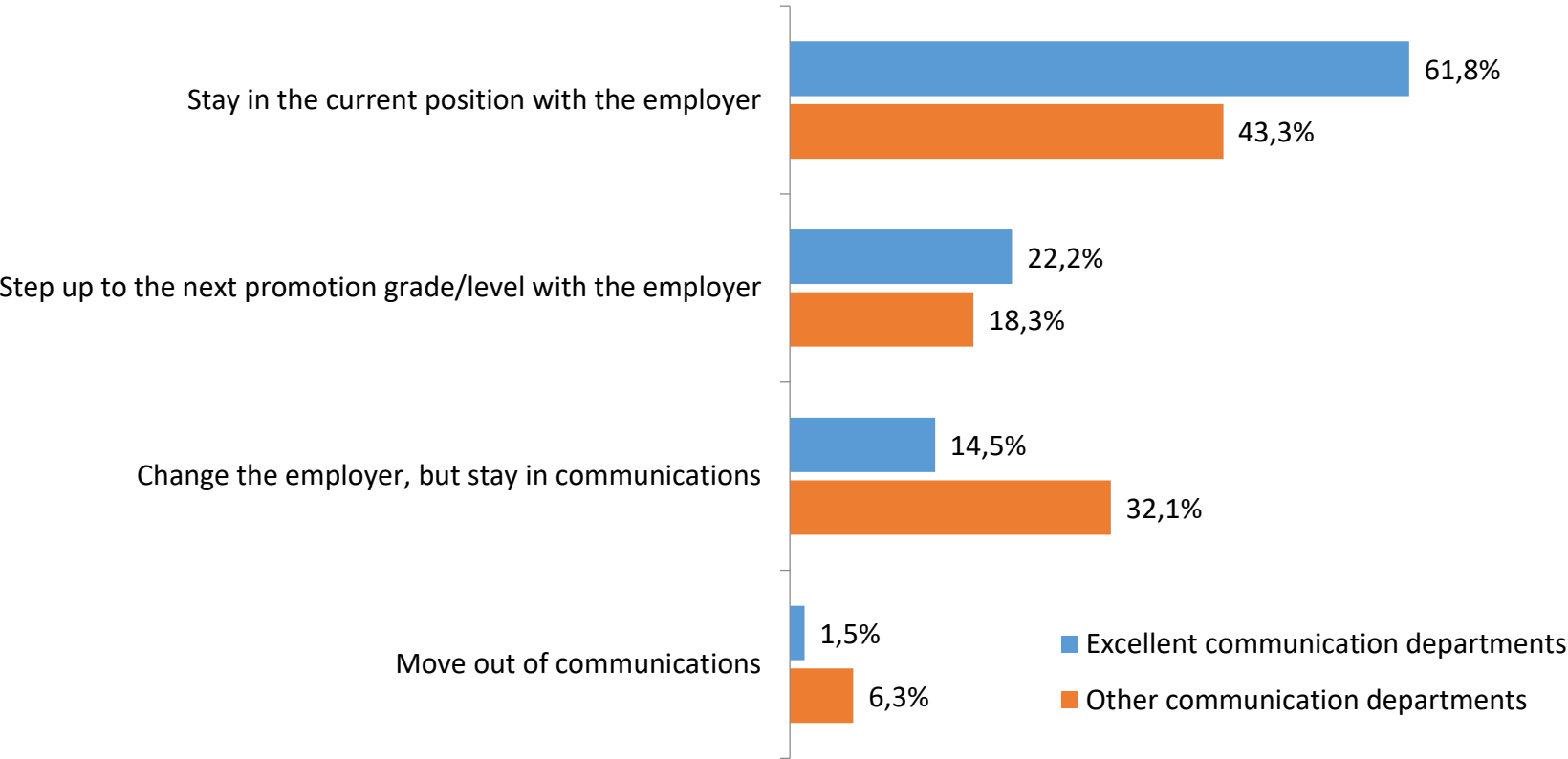


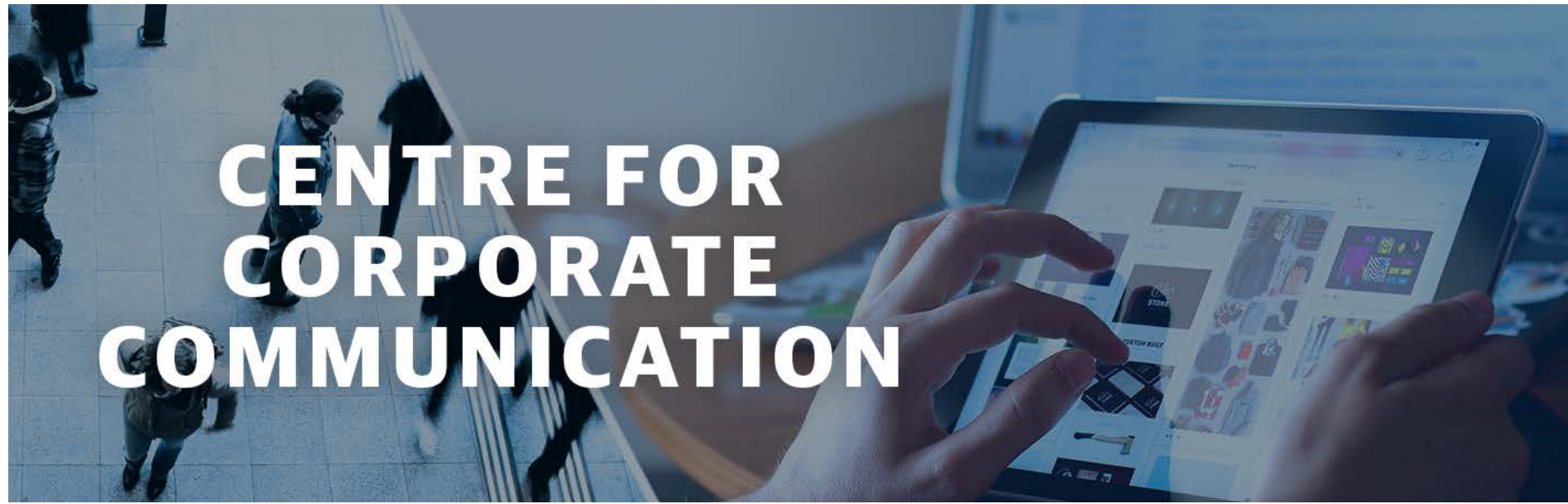
Job satisfaction in excellent communication departments is higher in all dimensions – especially with regard to perceived job status and career opportunities



Practitioners working in excellent communication departments are significantly more loyal to their employer

*Career development plans within the next 12 months*





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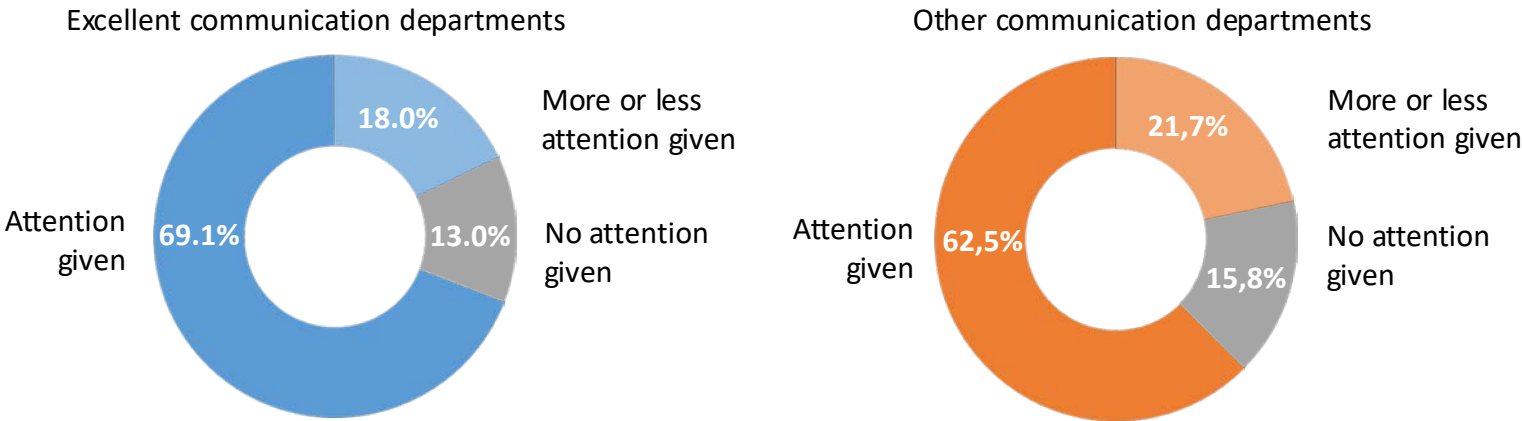
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Excellent departments are better prepared to deal with fake news

Attention given to the debate about fake news



Organisational approach to identify fake news

