

#NORA

THE NORDIC ALLIANCE FOR
COMMUNICATION & MANAGEMENT

THE NORDIC COMMUNICATIONS REPORT 2022

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

September 2022



THE NORDIC COMMUNICATIONS REPORT 2022
Current and future trends in Norway, Denmark, Finland and Sweden

**Winni Johansen, Sabrina Doberts, Finn Frandsen, Alexander Buhmann,
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
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Foreword



Welcome to this second Nordic Communications Report!

The Nordic countries are characterised by strong welfare states providing a high degree of social security, economic systems as well as an organised work-life setting leading to a high level of trust and social equality - often referred to as the Nordic or Scandinavian model (Bjørnskov, 2021; Ihlen et al., 2022). Furthermore, the Nordic countries are according to the World Happiness Report all among the happiest countries in the world (Helliwell et al., 2022), having a high level of social trust, tolerance, freedom of life, and "a resilient lively culture of democracy" (Bjørnskov, 2021, p. 99). The COVID-19 pandemic has led to new studies of this Nordic model and strategic communication in the Nordic countries, as well as to interesting comparisons among the four countries (Bjørnskov, 2021; Buhmann et al. 2021; Falkheimer & Raknes, 2022; Frandsen & Johansen, 2022; Ihlen et al., 2022; Laage-Thomsen & Frandsen, 2022; Seth & Banerjee, 2021; Valentini & Badham, 2022).

For this report, the Nordic Alliance for Communication and Management (#NORA) has collaborated with national communication associations in Denmark, Finland, Norway and Sweden as well as with the European Communication Monitor Series to publish the second pan-Nordic study of the communication field.

The respondents of the survey work in communication agencies and departments in joint stock companies, private companies, government-owned companies, public sector organisations, political organisations, as well as non-profit organisations and associations. The insights presented in the report shed light on current and future trends in the communication field in the Nordic region. The study explores important themes such as diversity, equality and inclusions; empathic leadership in communication teams and dimensions such as organisational commitment, work engagement and mental health;

CommTech and the digital transformation of communications; external consulting in communications including complexity, quality and the need for quality standards. And it also covers a look to the future by exploring strategic issues and work practices in the profession in the years to come. All results are compared across the Nordic countries and they are benchmarked against the rest of Europe.

This report has been prepared by Winni Johansen, Sabrina Doberts, Finn Frandsen, Alexander Buhmann, Vilma Luoma-aho, Jesper Falkheimer and Ansgar Zeffass and supported by Elise Marthinsen, who took care of editing and the design respectively. On behalf of the team, we would like to thank all professionals who participated in the survey. We 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), Kia Haring (Tietoevry), and Yngve Kveine (BI Norwegian Business School). We also appreciate 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, we would like to thank Ralph Tench, Dejan Verčič and Ángeles Moreno, and Jens Hagelstein for their great work. Finally, we would like to express our gratitude to all academic partners of #NORA who supported the process of data collection to build this unique pan-Nordic sample.

Professor Dr. Winni Johansen
Academic Partner, The Nordic Alliance for Communication & Management (#NORA)

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 current 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 provides insights into various topics. First, it presents strategic issues for the future of the communication profession. Second, the study provides insights into the impact of debates on diversity, equality, and inclusion on the profession. Third, it explores the trend towards a more empathic leadership style evident during the COVID-19 pandemic and closely examines practitioners' organisational commitment, work engagement, mental health, and turnover intentions. It also discusses CommTech and the challenges of digital transformation of communication, followed by the dynamics of external communication consultancy, quality dimensions, and the need for quality standards. Finally, working practices of communicators in the post-pandemic world are presented.

The results in this report are based on 253 responses from communication professionals working in communication departments and agencies across Norway (n = 70), Denmark (n = 42), Finland (n = 67) and Sweden (n = 74). The ECM series has experienced a drop in participation between the 2021 and 2022 studies that also shows in this Nordic report. This may be explained by survey 'fatigue' due to an increased number of surveys during COVID-19. But most importantly participation will also have been affected by the dramatic events during February and March this year, with the survey being fielded during the time when Russia started its war against Ukraine. The response rate, as it is, should lead to some caution to not take single results as representative. Nevertheless, the insights presented in this report can give important indications of trends in the field and can fuel and inform debates around key topics for the communication profession. It is also possible to compare the ECM results with other national surveys in the Nordic countries.

A closer look at the sample shows that the majority of respondents are communication leaders with a solid

qualification background and evidenced longevity of tenure in the field: 96.4% have an academic degree and three out of four professionals (78.3%) have more than 10 years of experience in communications. 28.9% hold a top hierarchical position as a head of communication or as a CEO of a communication consultancy; 22.3% are unit leaders or in charge of a single communication discipline in an organisation. The average age is 47.7 years. Four out of five professionals work in communication departments in organisations (joint stock companies, 13.8%; private companies, 19.4%; government-owned, public sector, political organisations, 39.9%; non-profit organisations, associations, 11.1%), while 14.8% are communication consultants working freelance or for agencies. The findings of this study are based on data gathered within the framework of the ECM 2022 (see page X for more details). Therefore, the collected data was subject to secondary analysis and examined with regard to the four Nordic countries.

The study used an online questionnaire that consisted of 36 questions in the English language. Between February and March 2022 more than 15,000 professionals throughout Europe were invited with personal emails 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, social media, and newsletters by the collaboration of 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.

Using the Statistical Package of the Social Sciences (SPSS) for data analysis, the 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 the results. Comparative insights were calculated between the four Nordic countries (Denmark, Finland, Norway, and Sweden) as well as between the four Nordic countries as a cluster versus Europe as a whole (i.e., the data from 43 European countries).

The Nordic sample: Professional and personal background of the respondents

Position (236)

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

Job experience (253)

More than 10 years	78.3%
6 to 10 years	12.3%
Up to 5 years	9.5%

Highest academic educational qualification (253)

Doctorate (Ph.D., Dr.)	2.0%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	62.5%
Bachelor (B.A., B.Sc.)	32.0%
No academic degree	3.6%

Organisation (253)

Joint stock company	13.8%
Private company	19.4%
Government-owned, public sector, political organisation	39.9%
Non-profit organisation, association	11.1%
Communication consultancy, PR agency, freelance consultant	15.8%

Gender/Age (252)

Female	67.9%
Male	32.1%
Age (on average)	47.7 yrs

Figure 1 $n \geq 253$ (for information on the full European sample see: Zerfass et al., 2022a).

1. Strategic issues in communication management

Since 2007 the ECM has been annually tracking key issues for the future of the communications profession. Asking communicators for their most important issues allows for

new tendencies and issues to appear over time. The study has asked for eleven strategic issues that will impact communication management until 2025 (see Figure 2).

1.1 Most important strategic issues for the profession

Most important strategic issues for communication management until 2025 for Nordic versus European communicators

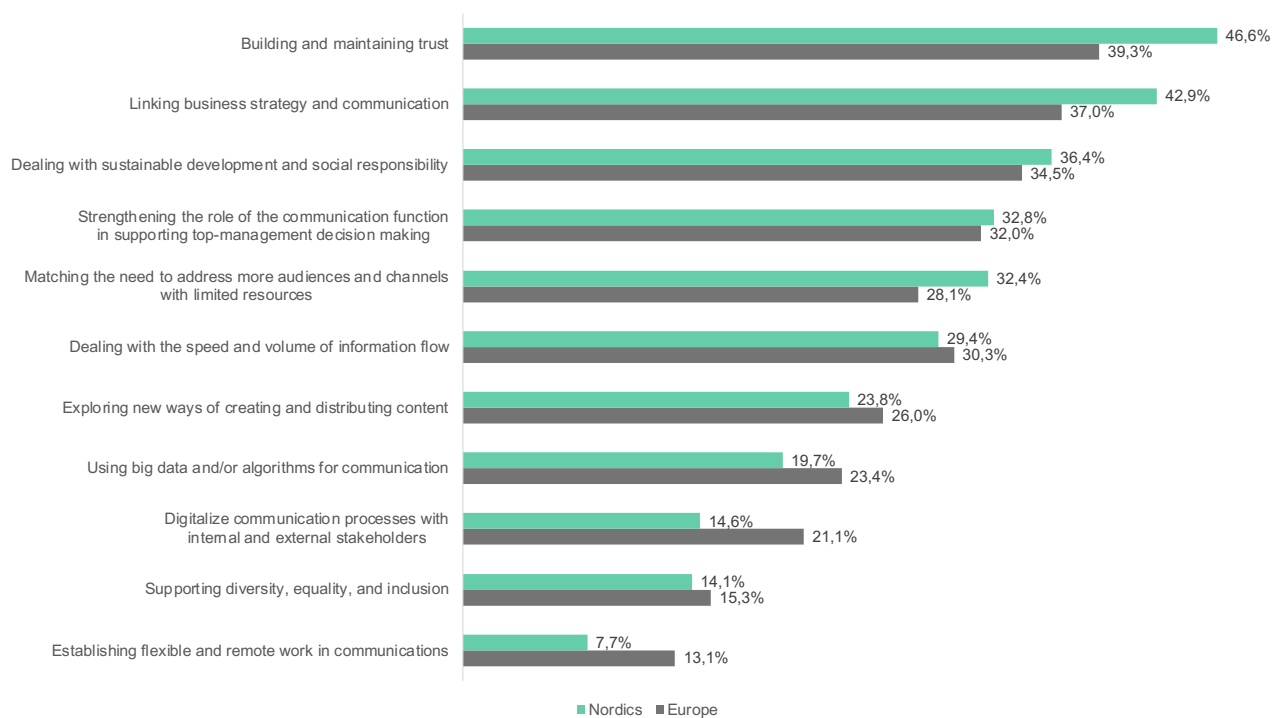


Figure 2 $n = 253$ (Nordics) / $n = 1,672$ (Europe). Q 19: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

In contrast to last year, the rating of the topics of the Nordic professionals versus the European counterparts has become much more aligned, showing that communication professionals across all of Europe are facing similar challenges. In 2022, building and maintaining trust is still the most important strategic issue for communication professionals in the Nordic region as well as across the rest of Europe. 46.6% of the Nordic respondents and 39.9% of their peers in Europe consider it the top issue. Compared to the previous year, the importance among Nordic communicators has increased by almost seven points – the steepest incline among all strategic issues between 2021 and 2022. Hence, we can expect trust to keep dominating the professional agenda at least until 2025.

Further, the data suggests that the second biggest challenge in the coming years is the link between corporate strategy and communications (42.9%). As forecasted in last

year's ECM report (Zerfass et al., 2021), the economic turbulences related to the pandemic have indeed seemingly perpetuated this trend: both in the Nordic countries and among the other European professionals, a clear increase compared to the previous year can be seen.

In addition, developments around the topics of sustainability and social responsibility will shape the communications agenda in the future. With an increase of six points compared to last year, the topic is rated as slightly more important by Nordic professionals (36.4%) than by the European sample (34.5%). Regarding issues that deal with digitalisation such as digitalising communication processes with stakeholders or establishing flexible and remote work in communications, it is notable that Nordic practitioners rate the importance clearly lower than the European average.



”



«Corporate Communications is more important than ever to build, develop and manage a company's reputation brand, and trust. To manage this, you need data-driven insight and competent employees who can operate and handle complex disciplines. It is all about making visible and humanizing the company's vision and strategy.»

Yngve Kveine

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

1.2 Exploring the Top-3 strategic issues in the Nordic countries

Top-3 strategic issues in the Nordics

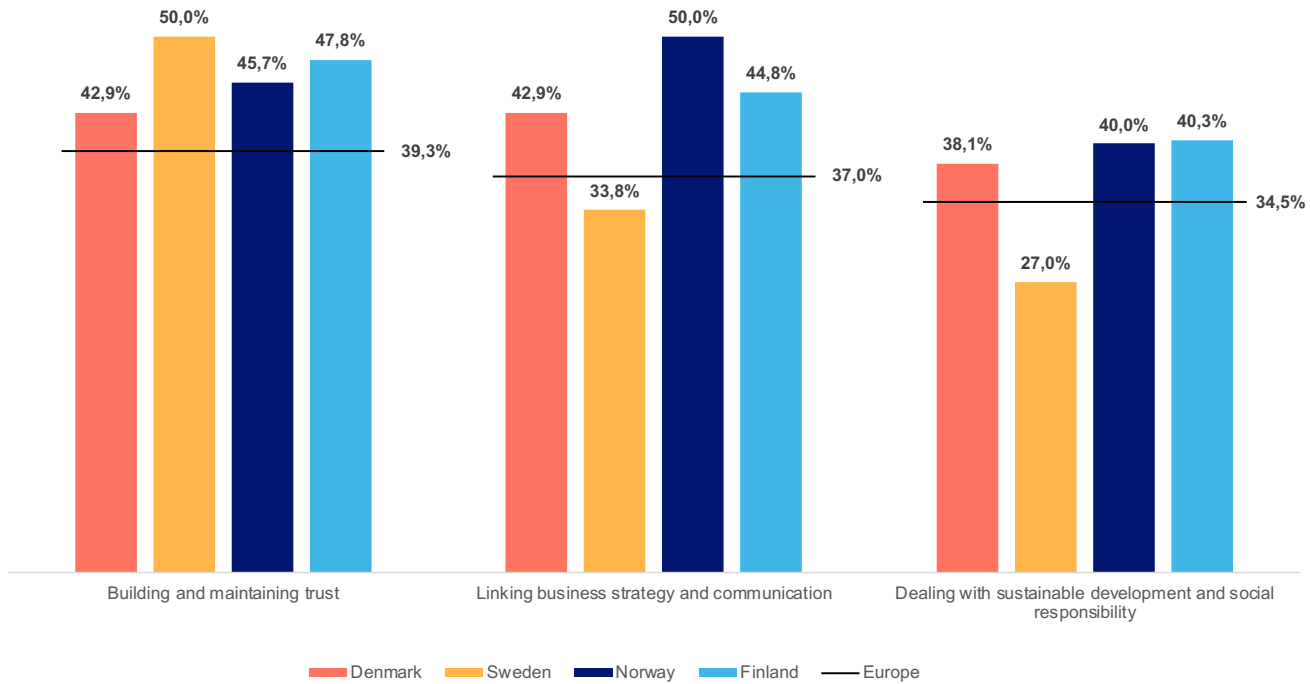


Figure 3 n = 253 (Nordics) / n = 1,672 (Europe). Q 19: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

Taking a closer look at the Top-3 issues defined by Nordic communicators, quite remarkable differences between the four countries are indicated by the data. Building and maintaining trust seems the most important strategic issue for Finnish and especially for Swedish professionals. Half of the communicators name it as the number one topic until 2025. This represents an increase of almost 10 percentage points among Swedish professionals, and Norwegian communicators also rank the issue as significantly more important (45.7%) than last year (33.7%).

Linking business strategy and communications seems to be critical for Norwegian communicators as one in two define it as the dominant challenge for the next three

years. Compared to the previous year, this is an increase in the importance of almost 15 per cent. Danish professionals consider this task to be as relevant as building and maintaining trust (42.9% each). In contrast, communication experts in Sweden assign much less importance (33.8%) than their Nordic colleagues and the European average (37.0%).

Dealing with sustainable development and social responsibility is an important topic for many communications professionals in Denmark (38.1%), Norway (40.0%) and Finland (40.3%). In contrast, only a quarter of Swedish professionals (27.0%) classify the topic as a driver for the communication profession.

”



«The rising critical issue for Norwegian communicators – linking business strategy and communications – forces the comms industry to enhance its approach. By understanding and delivering to the business strategy, most of the other issues may be solved implicitly – such as strengthening the role of the communication function in supporting top management decision-making, dealing with the speed and volume of information flow, using data and algorithms, the value of communications, and trust. Hence, learn to decode the business strategy and make a direct link to the communications strategy. Then you have a framework for prioritization and direction.»

Svein Inge Leirgulen

Chairman of the board at the Norwegian Communication Association;
Kommunikasjonsforeningen

2. Diversity, equality, and inclusion as a challenge for the profession?

Diversity, equality, and inclusion (DEI) are concepts influencing organisational policies and communications worldwide. The debate has been expanded from diversity to a broader conception including fair treatment of everybody (equality) and building a culture of being seen, heard, and valued (inclusion) (Bendl et al., 2014; Mor Barak, 2022; Vertovec, 2015). There is also an increasing discussion about the role DEI should play in communications and vice versa (Mundy, 2016). However, does this resonate in the daily practice of communication management?

The results show that only every second communication professional in Europe has followed global debates about diversity, equality and inclusion (DEI) and confirms their national relevance. However, communication professionals in the Nordics pay less attention to the global debate (46.7%), while assigning more importance to the national debate (59.9%). Still, only 14.1% of the Nordic professionals believe that supporting diversity, equality, and inclusion is one of the most important strategic issues of the profession within the next three years.

Debate about DEI in the Nordics versus Europe

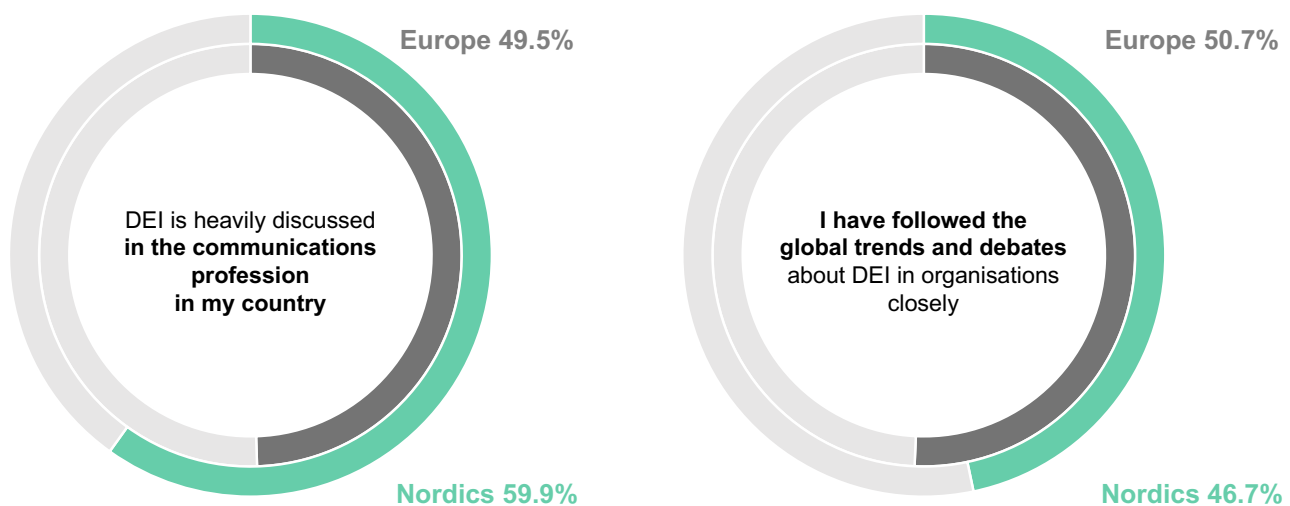


Figure 4 n = 240 (Nordics) / n = 1,609 (Europe). Q 10: To what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

2.1 Impact of DEI on communication profession

Strategic communication about DEI, especially as part of formal communication, is said to be key to increase the perception of inclusion and thus develop a highly inclusive workplace (Wolfgruber et al., 2021). Most Nordic communicators fear the risks of losing trust from external (85.1%) and internal stakeholders (74.9%) by communicating too positively (promoting) about DEI initiatives. Among European respondents, this fear is clearly lower

(74.6% and 70.7% respectively). However, both groups are equally careful to consider DEI factors in content production (69.2%). Nevertheless only one-third of the Nordic respondents believe in an actual change towards diversity in the communication workforce in the near future (35.6%). In addition, communicators are rarely the primary leaders of DEI initiatives in organisations.

Impact of DEI on communicators in the Nordics versus Europe



Figure 5 n = 240 (Nordics) / n = 1,609 (Europe). Q 11: The debate on diversity, equality, and inclusion in organisations and society might influence communications in different ways. When thinking of your own organisation, how much would you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

”



«Diversity, equality, and inclusion are among the key drivers for creating a modern corporate culture that attracts talent and supports business growth. Communication and leadership are the vehicles for building a winning culture – hence important for communicators to consider the various aspects of diversity and focus on inclusive communications. Words matter – and they need to be aligned with concrete actions!»

Kia Haring
Head of Communications, Sustainability, Brand & Marketing;
TietoEVRY

2.2 Responsibilities of communications for DEI initiatives

Responsibilities of communicators for DEI initiatives in the Nordics versus Europe

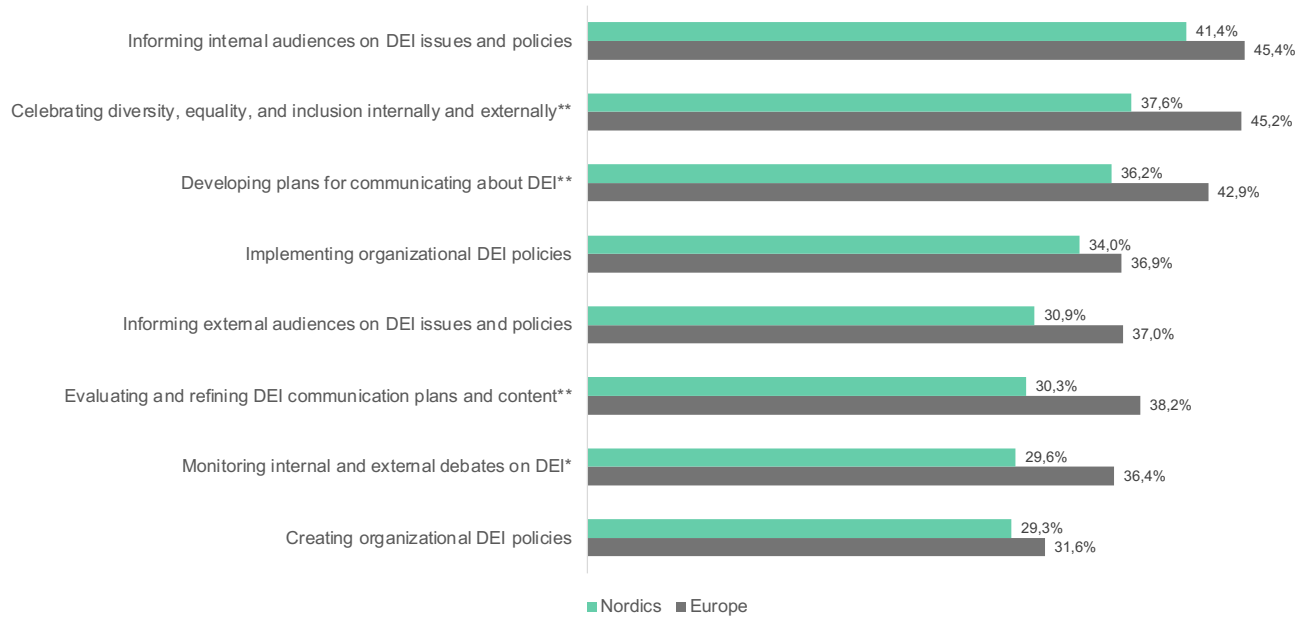


Figure 6 $n = 240$ (Nordics) / $n = 1,609$ (Europe). Q 13: To what extent does your department or agency actively engage in establishing or communicating diversity, equality, and inclusion (DEI) policies for your organisation or clients in the following ways? Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Overall, Nordic communications professionals are far less involved in and responsible for DEI initiatives than their counterparts in the rest of Europe. They are primarily involved in informing internal audiences about DEI issues and policies (41.4%) and acknowledging DEI internally and externally (37.6%). But not even a third (29.3%) is responsi-

ble for creating DEI policies. Surprisingly also only 36.2% is included in the strategic task of developing plans for communicating about DEI, which is significantly less than the European average (42.9%). Consequently, Nordic communicators are also significantly less involved in the evaluation and refining of DEI communication content.

”



«When it comes to DEI communication it is important that communications and people functions work closely together. We have developed a communications strategy for both internal and external communication. However, the challenge for international corporations is that not one size fits all. DEI communication needs to be very tailored to geographies and cultures to feel authentic. We have established DEI committees in various regions to ensure that we involve our employees and understand their needs and expectations.»

Ulrike Haugen
EVP Communications, Public Affairs & Sustainability,
Chief Communications Officer;
DNV

2.3 Diversity dimensions

Consideration of different diversity dimensions in the Nordics versus Europe

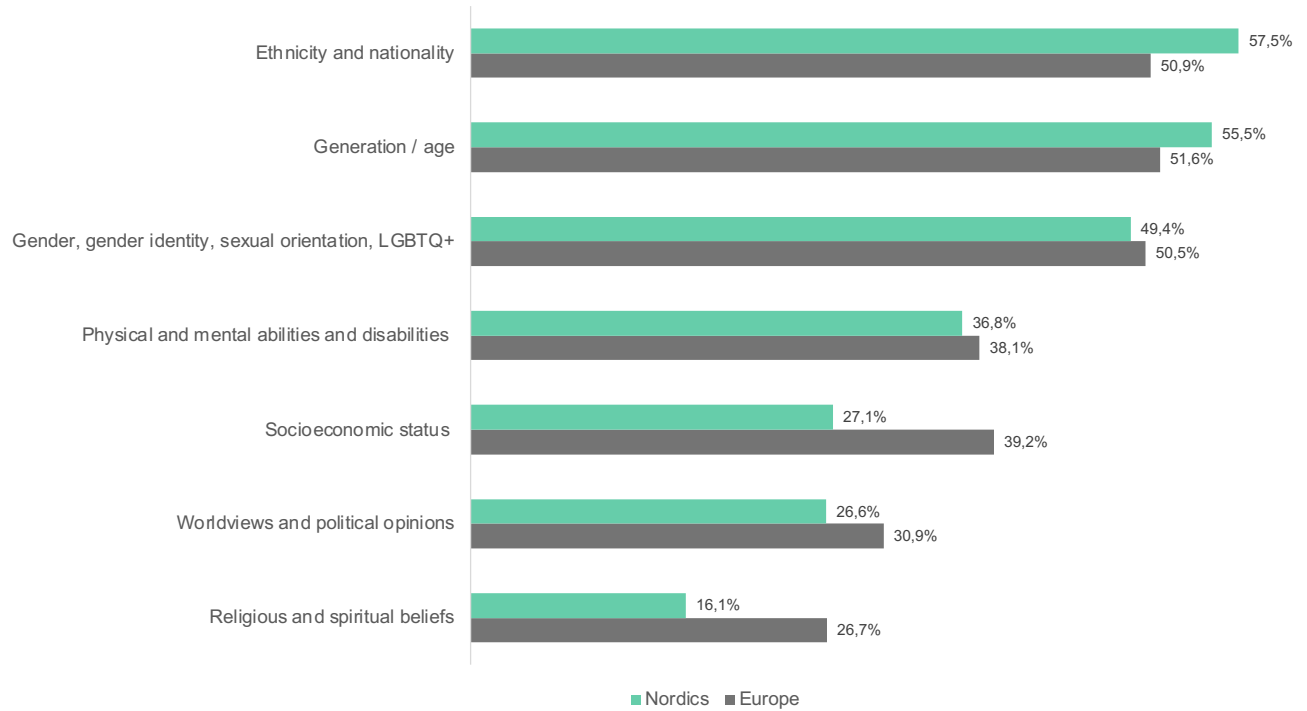


Figure 7 $n = 240$ (Nordics) / $n = 1,609$ (Europe). Q 12: To what extent are the following dimensions of diversity considered in the communication initiatives of your organisation? Scale 1 (Not at all) – 5 (To a great extent). Frequencies based on scale points 4-5.

Looking at typical dimensions of diversity (Charta der Vielfalt, 2021), ethnicity and nationality as well as generation/age are more important to Nordic professionals compared to their European counterparts. More than half of Nordic communicators consider ethnicity and nationality (57.5%) as well as generation/age (55.5%) and almost half consider gender issues (49.4%) when planning and executing communication initiatives. Disabilities, sociocultural status, worldviews and political opinions, and spiritual beliefs are however taken into account less often. A clear difference can also be seen in the consideration of socioeconomic status: While only one out of four Nordic professionals takes that dimension into account while planning and executing communication initiatives, the European sample

is considering it more carefully (39.2%). This can perhaps be explained by the Nordic welfare system (Christiansen, 2006; Ihlen et al., 2022; Kildal & Kuhnle, 2007). Finally, religious and spiritual beliefs are rarely taken into account by Nordic communicators (16.1%), while at least one-fourth of the European practitioners considers this dimension in their communication initiatives. This finding is in line with the results of the World Values Survey, which shows that our societies and especially those in Northern Europe are becoming more and more secularised (Haerpfer et al., 2022), and the results of the World Happiness Reports and European Social Survey that show that “the Nordic region happens to be the least religious” (Bjørnskov, 2021, p. 84).

Top 3 diversity dimensions in the Nordic countries

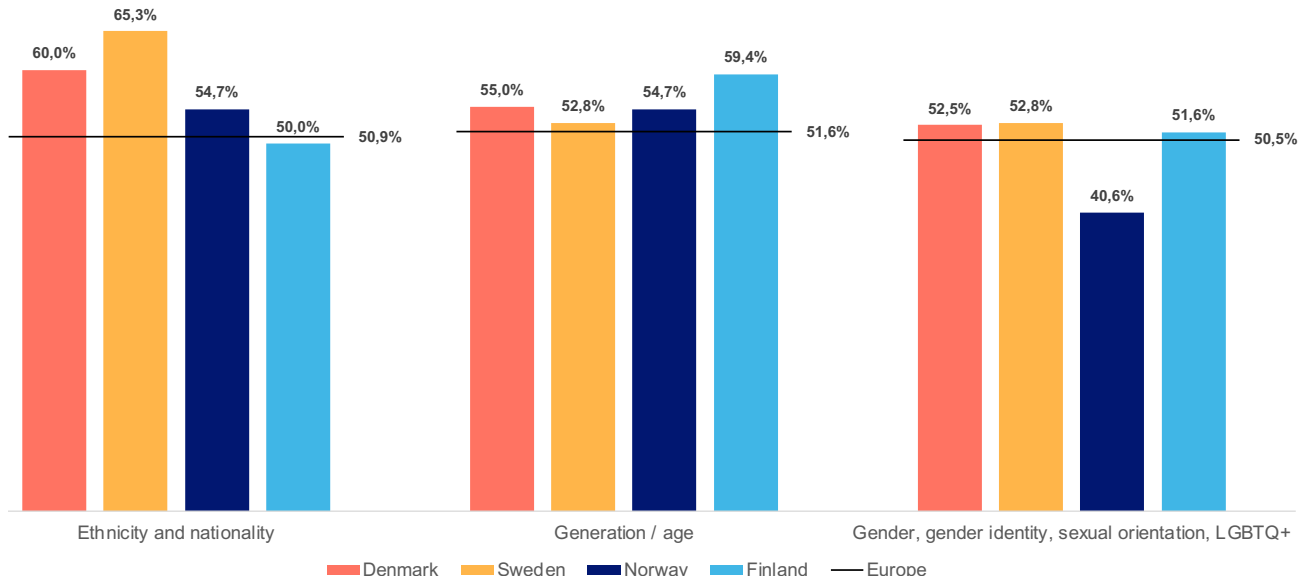


Figure 8 n = 240 (Nordics) / n = 1,609 (Europe). Q 12: To what extent are the following dimensions of diversity considered in the communication initiatives of your organisation? Scale 1 (Not at all) – 5 (To a great extent). Frequencies based on scale points 4-5.

Examining the results for the individual countries, it is notable that the dimensions are taken into account to varying degrees. Two-thirds of Swedish organisations (65.3%) and 60.0% of Danish organisations most carefully consider ethnicity and nationality whereas for Finnish professionals generation/age is the most important diversity dimension (59.4%). Communication professionals from Norway generally seem to have less focus on the DEI dimensions when

creating content compared to their Nordic counterparts. This is especially true for the gender and sexual orientation dimension: While more than half of the communicators from Sweden (52.8%), Denmark (52.5%), and Finland (51.6%) consider this dimension important and slightly more often than the European average (50.5%), only four out of ten Norwegian professionals take it into account to a great extent.

3. Empathic leadership in communication teams

During times of crisis, such as the COVID-19 pandemic, there is a call for organisational leaders to communicate with more empathy. Empathy refers to the ability to understand the world from another person's point of view. It enables leaders to show individual consideration for their employees (e.g., Avolio & Bass, 1995), recognize emotions in others (Rubin et al., 2005), and be aware of both themselves and the context (Walumbwa et al., 2008).

Very much like their peers across the rest of Europe, three out of four communication professionals in the Nordic region (73.6%) experience their direct communication leader as empathic. Not surprisingly, the level of empathy has clearly increased in the last year during the pandemic, however, more for the European (56.7%) than for the Nordic region (45.6%).

3.1 How empathy is expressed

Empathy can be expressed in different ways. To care about the personal well-being of their team members and show sensitivity and understanding is the most important way to show empathy for three out of four respondents (77.7%) in the Nordic countries. This is followed by paying attention and listening well (64.0%) and identifying other team mem-

bers' strengths and limitations (63.8%). Although Nordic practitioners rate the importance of asking questions, reading other team members' moods, feelings, or nonverbal cues, and assessing the underlying causes of a person's problem relatively high, the numbers are clearly lower than the European average.

Showing empathy in the Nordics versus Europe

Direct communication leader....

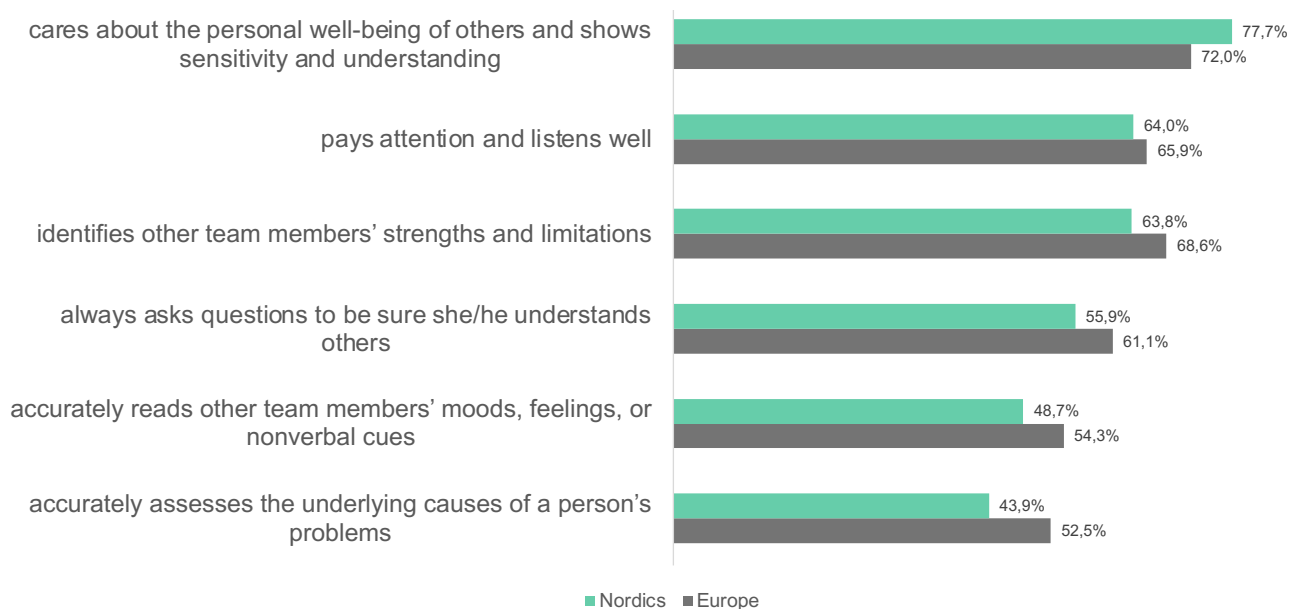


Figure 9 n = 243 (Nordics) / n = 1,623 (Europe). Q 15: And to what extent do you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

”



«Authentic leadership is about building trust – and an effective way to build trust is through empathy. Employees who feel you are empathic and understanding of their situation, problems and challenges will engage in the business and do their best to deliver what you agreed upon.»

Caroline Thunved
CEO and Secretary General;
Sveriges Kommunikatörer

3.2 Organisational commitment, work engagement and mental health

As the ECM results reveal, empathic leadership can strengthen the commitment of team members towards the organisation significantly and influence the work engagement as well as the mental health of employees (Zerfass et al., 2022a).

Organisational commitment refers to having a great deal of personal meaning to work in an organisation, a strong sense of belonging, and a personal attachment to the organisation (Meyer & Allen, 1997). Work engagement is measured by the three dimensions of vigour, dedication and absorption (Schaufeli & Bakker, 2004). Finally, mental

health is examined in the professional context by looking at the ability to solve problems at work, the attitude towards one's work, and the level of exhaustion after a workday (van Dierendonk et al., 2001).

If we start by taking a closer look at the four Nordic countries, some differences are suggested by the data. Across all three categories, Denmark followed by Sweden in particular stands out with ratings well above the European average whereas Norway and in particular Finland show ratings below the European average.

Commitment, work engagement and mental health of Nordic Professionals

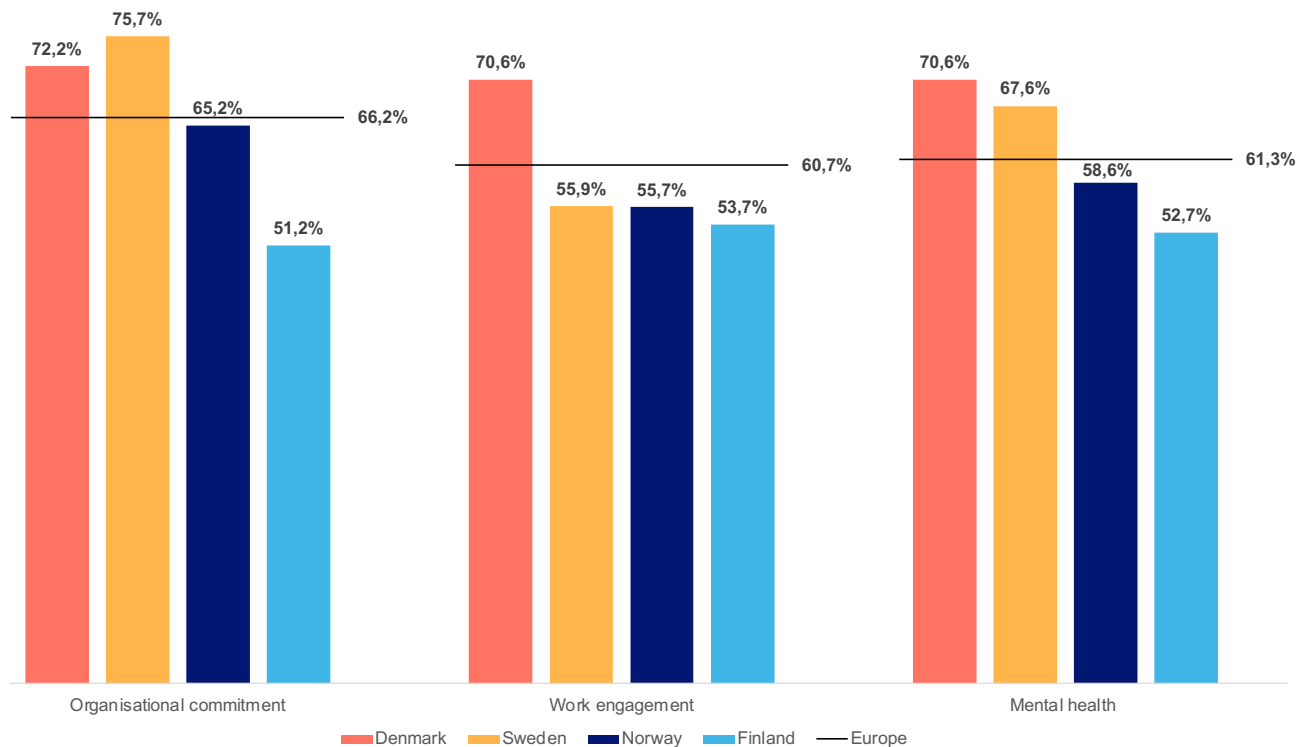


Figure 10 n = 253 (Nordics) / n = 1,672 (Europe). Q16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree).

Nordic communication professionals demonstrate a strong bond to the organisation they currently work for. However, Denmark and Sweden clearly stand out compared to the European average (66.2%). Almost three out of four Danish and Swedish professionals feel strong commitment, for Norwegian professionals it's two out of three, whereas half of the Finnish professionals feel strong commitment. It is almost the same picture for mental health. Almost seven out of ten Danish (70.6%) and Swedish

communicators (67.7%) feel very well when it comes to their mental health. In contrast, professionals from Norway and Finland (58.6% and 52.7% respectively) find themselves below the European average (61.3%). Work engagement is especially high among Danish professionals (70.6%). Also more than half of the professionals in Sweden (55.9%), Norway (55.7%) and Finland (53.7%) feel engaged at work - this is, however, below the European average.

”



«In today's world of constant change and complex cultural encounters, insight in empathic leadership and DEI are important for respectful navigation and social sustainability. Feeling appreciated and highly valued contributes to energy and commitment for a workplace. But it is worrying that more than 50% to 75% of Nordic communicators feel used up at the end of a workday. This points to the importance of many themes, e.g., work-life balance, participation, influence on one's own work, and, yes, DEI aspects.»

Katrine Ninn-Grønne

Chairperson of the Danish Communication Association;
K1 Kommunikationsforening

Subdimensions of organisational commitment, work engagement and mental health for the Nordic countries

	Items	Denmark	Sweden	Norway	Finland	Nordics	Europe
Organisational commitment	Working at my organization has a great deal of personal meaning to me.	83.3%	82.4%	71.4%	52.2%	72.4%	68.1%
	I have a strong sense of belonging to my organization.	71.4%	71.6%	61.4%	53.7%	64.6%	65.5%
	I feel personally attached to my organization.	61.9%	73.0%	62.9%	47.8%	61.4%	65.2%
Work engagement	I am enthusiastic about my job.	85.7%	79.7%	77.1%	70.1%	78.2%	74.5%
	I am immersed in my work.	59.5%	40.5%	50.0%	55.2%	51.3%	62.1%
	At my work, I feel bursting with energy.	66.7%	47.3%	40.0%	35.8%	47.4%	45.5%
Mental health	I can effectively solve the problems that arise in my work.	88.1%	79.7%	78.6%	65.7%	78.0%	80.3%
	I do not doubt the significance of my work.	76.2%	85.1%	70.0%	67.2%	74.6%	65.9%
	I do not feel used up at the end of a work day.	47.6%	37.8%	27.1%	25.4%	34.5%	37.9%

Figure 11 $n = 253$ (Nordics) / $n = 1,672$ (Europe). Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

By taking a closer look at the subdimensions related to commitment, engagement and mental health, other important differences appear.

The organisational commitment is highest among Danish and Swedish professionals (seven or even eight out of ten), with the Swedes having the highest score for personal attachment (73.0%) followed by Norwegian professionals (two-thirds), whereas only half of the Finnish colleagues feel that their work means a great deal to them personally, that they have a sense of belonging or that feel personally attached to the organisation they work for.

Although the work engagement of the Nordic communicators on average is also remarkably high, the three dimensions of dedication, absorption and vigour used to measure it (Schaufeli & Bakker, 2004) are rated differently: Eight out of ten communicators are enthusiastic about their job, but only half feel full of energy at work. If we look at each of the four countries: Danish professionals

are the most enthusiastic (85.7%), immersed in their work (59.5%) and bursting with energy (66.7%). Compared to their Danish colleagues, Swedish and Norwegian professionals are also very enthusiastic about their work, but less immersed in their work (40.5% and 50.0%, respectively) and their level of energy is lower (47.3% and 40.0%, respectively). Concerning the Finnish communicators, they are also enthusiastic about their work (70.1%), and more immersed in their work (55.2%) compared to Swedish and Norwegian colleagues, but only one-third of them feel bursting with energy (35.8%) at work.

During the pandemic, there was a lot of debate about the additional stress caused by overtime and the home office situation as well as the resulting consequences on mental health (Wolfschlag et al., 2021). To gain insights into the work-related mental health of the respondents and the risk of burnout, the three items of job efficiency, depersonalisation (evaluation of the importance of work), and exhaustion by van Dierendonk et al. (2001) were used.

The Danish professionals show good mental health and find themselves above average compared to the European professionals. They can effectively solve problems (88.1%), and are in no doubt about the significance of their work (76.2%). However, only half of them do not feel exhausted by the end of the day. Also Swedish professionals have a high score on the significance of work (85.1%) versus the Norwegians (70.0%) and the Finnish professionals (67.2%). But when it comes to not feeling exhausted at work, only every third of the Swedish professionals and one out of four of the Norwegian and Finnish professionals do not feel exhausted, which is below the European average (37.9%).

As Finland along with the other Nordic countries is considered the happiest place to live in the world (WHR, 2022), the results on mental health are surprising. Finnish professionals appear to be less committed and engaged compared to their Nordic colleagues. Although they are also enthusiastic about their work to a very high extent (70.1%),

only a little more than 50% feel committed and engaged, and when it comes to energy only one-third feel full of it. Except for the significance of their work, Finnish professionals have a lower score on all mental health sub-dimensions compared to their Nordic colleagues as well as to their European counterparts, for instance, only two-thirds (65.7%) compared to 80.3% of the European average feel able to solve problems that arise in their work.

However, not feeling used up at the end of the day seems to constitute a big problem for all Nordic as well as European professionals. Research on the period of COVID-19 shows that this has been an extremely busy period for the communication profession, and it may partially explain the mental health results. Communicators knew how to deal with their tasks, and they felt that they had important work to do to make the impact of COVID-19 less harmful, but at the end of the day many of them (from more than 50% up to 75%) felt used up by the high workload (Frandsen & Johansen, 2022a).

3.3 Turnover intention

Turnover intention Nordics versus Europe

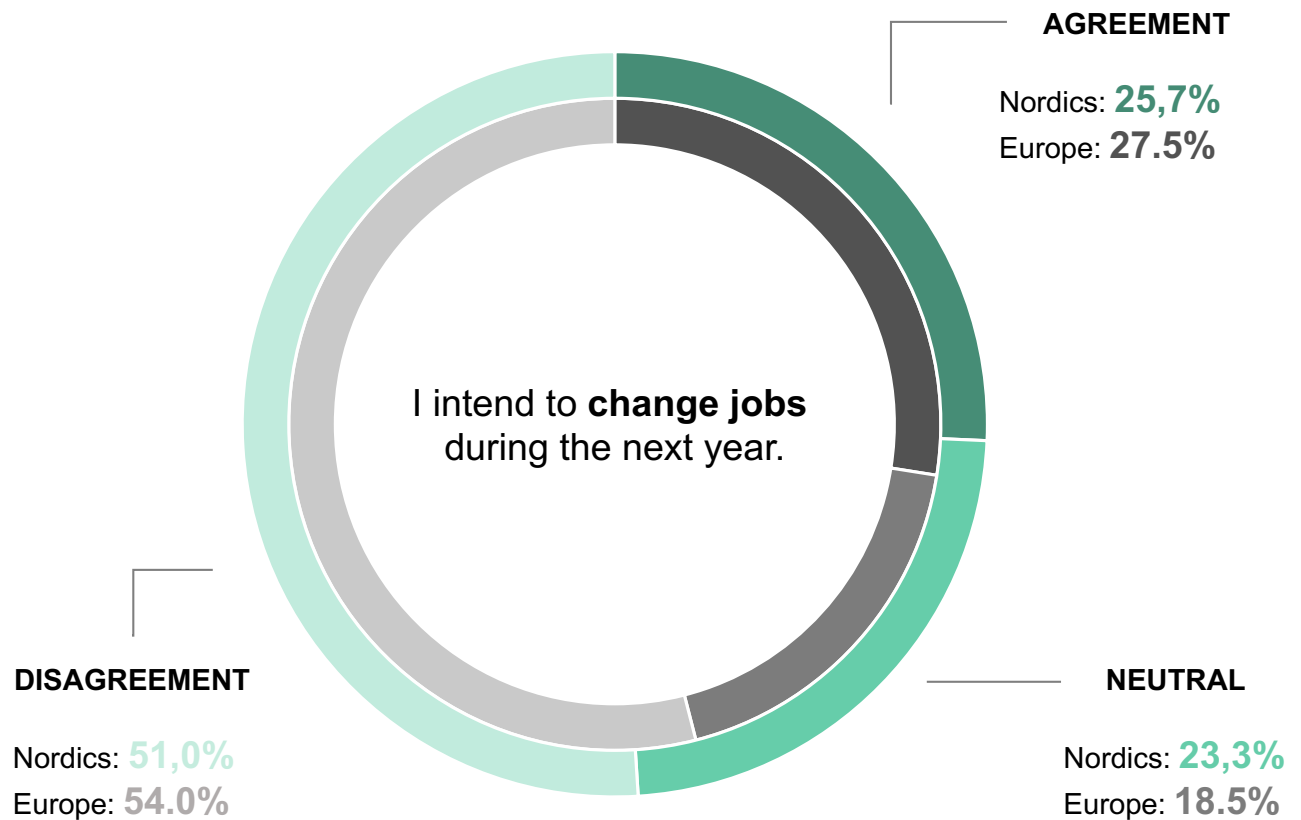


Figure 12 n = 253 (Nordics) / n = 1,672 (Europe). Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree).

When it comes to turnover intention, the Nordic professionals are very much like their European colleagues. More than half of communication professionals are satisfied with their current position. Yet, the satisfaction score is slightly higher in the European group with three points difference. One out of four Nordic professionals plans to apply

for a different job. However in Finland, even one in three professionals (32.8%) is planning on changing jobs, and this higher turnover intention may be related to the lower level of commitment, engagement and mental health among Finnish professionals.

4. CommTech and the digital transformation of communications

The digital transformation of communication departments and agencies seems to be a hot topic today, being discussed in practice (Arthur W. Page Society, 2021; Weiner, 2021) and research (Zerfass et al., 2021) – often discussed under the label “CommTech”. CommTech “are digital technologies provided or used by communications functions or departments to manage and perform primary activities, particularly stakeholder communications and internal advising, or functional support activities such as managing

internal workflows for monitoring, content planning, or evaluation” (Brockhaus et al., 2022, p. 4). Empirical studies show, however, that the communications industry is not yet fully mature in using these digital technologies (Brockhaus et al., 2022; Zerfass et al., 2021). The following section examines the reasons for this situation among the Nordic countries and highlights the current status of digitalisation in the communications units as well as the current implementation challenges.



4.1 Public debate and relevance of CommTech

Public debate on CommTech in the Nordics compared to Europe

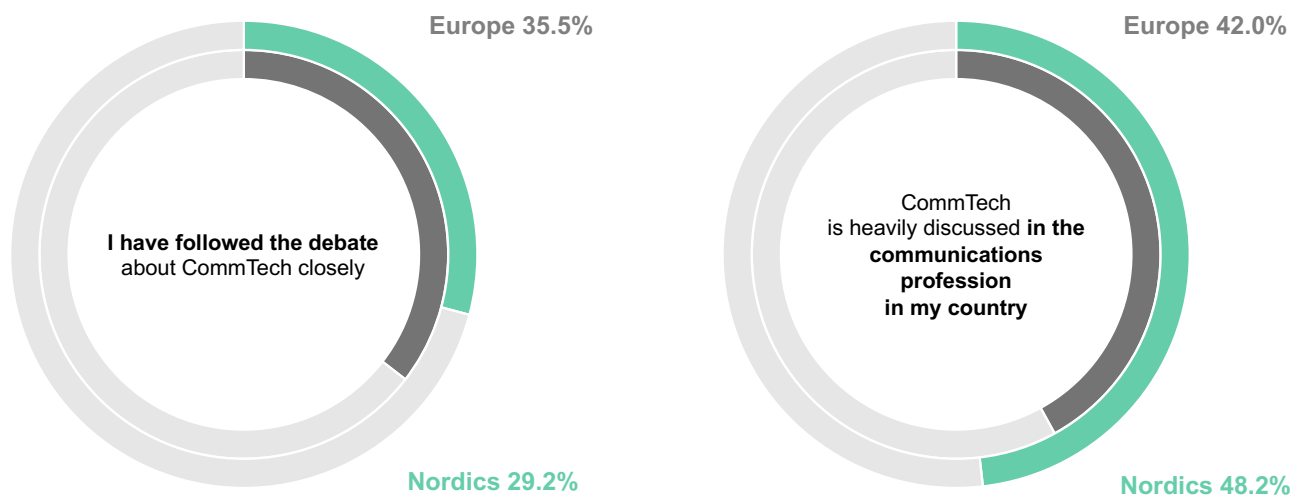


Figure 13 $n = 217$ (Nordics) / $n = 1,412$ (Europe). Q 1: Generally speaking, what is your impression on CommTech? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

Despite the rapid change towards a more digitalised society, making the use of CommTech increasingly relevant, the majority of communicators in the Nordic countries pay little attention to the debate about CommTech. Not even one-third of the Nordic professionals (29.2%) have followed the debate closely, and only one in two (48.2%) report that the topic is being discussed heavily within their national communications profession. However, there are

country-specific differences: Six out of ten communicators in Sweden and Norway who report a debate about CommTech in the national profession contrast with not even four out of ten professionals in Denmark and Finland (39.5% and 35.1%, respectively). Despite differences in the perceived intensity of the debate, Nordic professionals are overall less personally engaged in it than the European sample.

Relevance of CommTech in the Nordics versus Europe

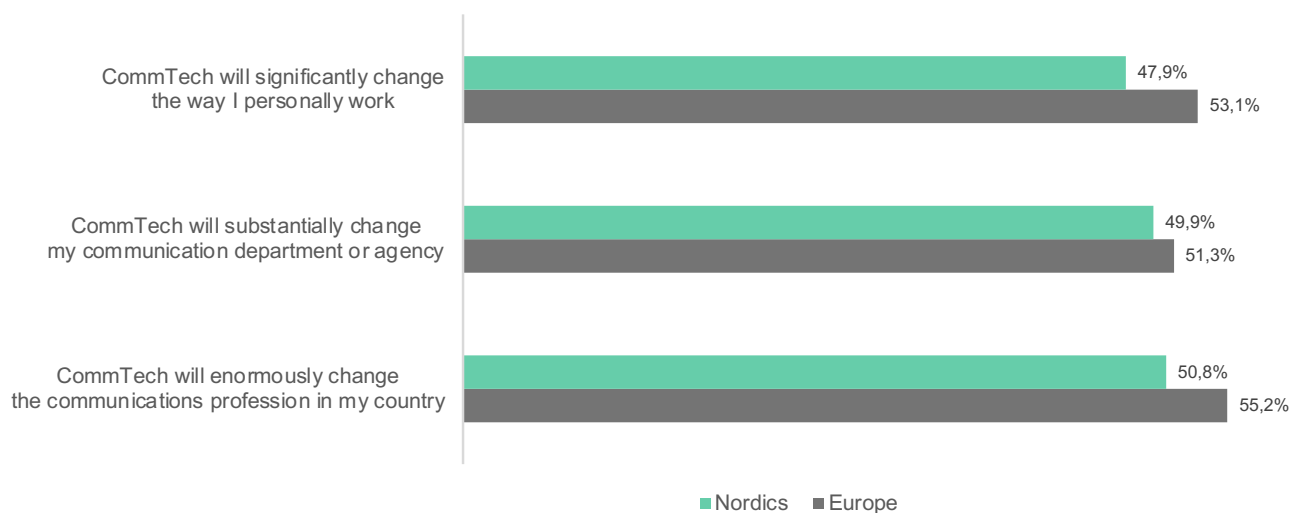


Figure 14 $n = 217$ (Nordics) / $n = 1,412$ (Europe). Q 1: Generally speaking, what is your impression on CommTech? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

The rather low level of interest in CommTech is also reflected in the results on the relevance that the experts attribute to the topic. Here, the Nordic experts rate the impact even lower than the European average. Only every second respondent in the Nordic sample believes that CommTech will significantly change the communications

profession (50.8%), the department or agency (49.9%), or their personal way of working (47.9%). Unlike their European counterparts, the Nordic experts see the impact of CommTech slightly more at the organisational than at the personal level.

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«My personal experience is that digitalisation offers the opportunity to work in a much more fact-driven way. With access to real-time performance data, all communication and marketing activities become much more effective. Decisions are easier to make and internal budget discussions also become much smoother with verifiable facts. I think we need to move beyond effective email and social media marketing to more personalised communication and use the full potential of digital tools. Therefore, artificial intelligence should be used to a greater extent to identify emerging trends and important changes in society as well as in the preferences of target groups.»

Cathrine Torp
Communication and Strategy Director;
The Norwegian Institute of Public Accountants

4.2 Status of digitalisation in communication departments and agencies

Level of digitalisation in communications departments and agencies in the Nordics vs. Europe

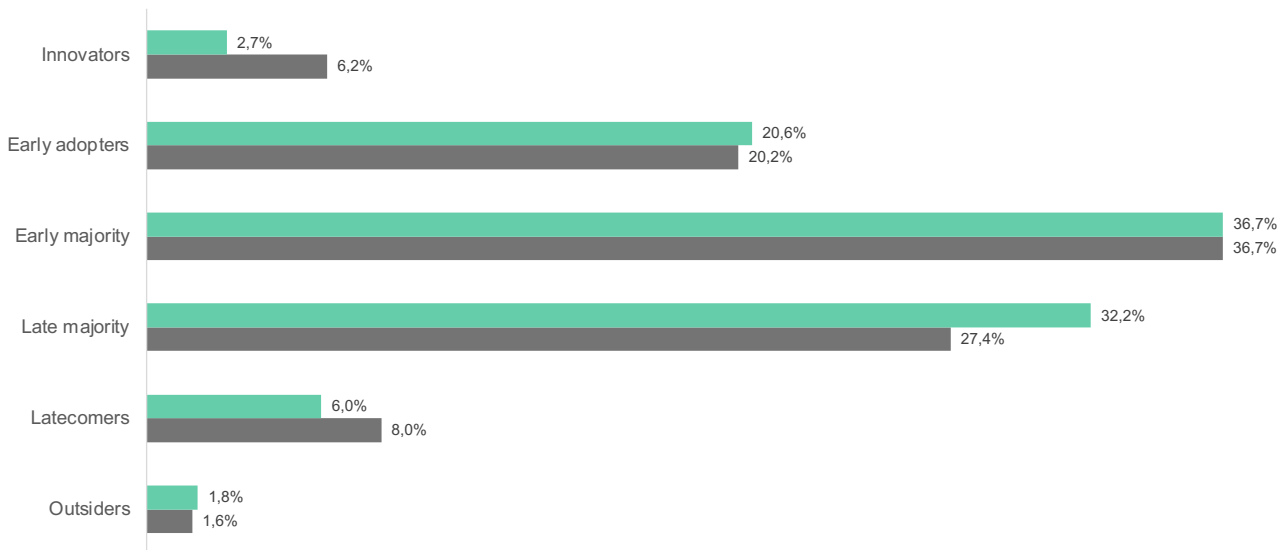


Figure 15 *n* = 217 (Nordics) / *n* = 1,412 (Europe). Q 3: How would you describe your department or agency in terms of digitalization and the use of CommTech; to which group does it belong? Please award 0 to 5 stars.

Looking at the current status of digitalisation and CommTech use, the Nordic countries are surprisingly behind their European peers. While the share of departments that have digitalised all their core activities and introduced a very advanced use of CommTech (innovators) is already only 6.2% in Europe, the percentage in the Nordics is even lower with only 2.7%. Most of the respondents classified their unit or agency either as early adopters (20.6%) or early

majority (36.7%) having an advanced or above average CommTech use. However, a total of 40.0% are lagging behind in practice, considering themselves as late majority, latecomers or outsiders. This means that they have some, a few or no digitalised core activities within their communication unit. Compared to the rest of Europe, the proportion of departments belonging to the late majority is higher in the Nordics than in the rest of Europe.

4.3 Challenges in introducing CommTech

Challenges in introducing CommTech for Nordic organisations

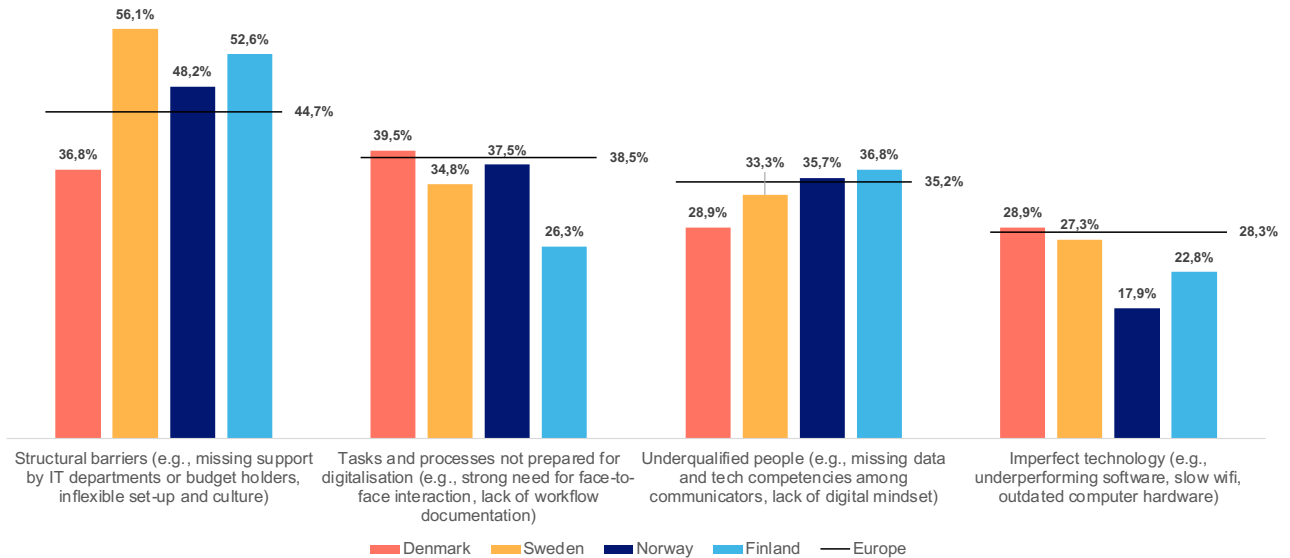


Figure 16 n = 217 (Nordics) / n = 1,412 (Europe). Q 4: What are the challenges in introducing CommTech in your organisation? Scale 1 (Not at all) – 5 (To a great extent). Frequencies based on scale points 4-5.

In general, organisational structures and processes pose a greater challenge to the adoption of CommTech in the Nordic countries than technological aspects. In Sweden and Finland in particular, but also in Norway, structural barriers such as inflexible structures and cultures or lack of support from IT departments are the biggest challenges to CommTech implementation, being ranked higher than the European average (44.7%). Only Danish communications departments and agencies appear to have fewer problems with structural obstacles (36.8%) Instead, they are struggling with the digitalisation of communication tasks and processes that are not prepared to be moved online e. g. due to a strong need for face-to-face interaction or a lack of workflow documentation. Finnish professionals are in a much better position here: only a quarter (26.3%) is confronted with this problem.

Similar to the European average (35.2%), communications professionals from Sweden (33.3%), Norway (35.7%), and Finland (36.8%) also see challenges in human factors, such as a lack of digital skills among communicators. Here, once again, the assessment of the Danish respondents differs from the other Nordic countries and the European average. Most Danish professionals already seem to have the necessary skills and mindset to deal with the technologies.

Finally, technological problems (e.g., inadequate software or slow Wi-Fi) may hinder the adoption of CommTech. Three out of ten professionals in Denmark and Sweden currently still see this as a challenge. However, organisations in Norway appear to already have the necessary technological infrastructure in place.

5. External consulting in communications: Complexity, quality and trends

Organisations are constantly introducing new communication activities to meet the demands of stakeholders and the changing media landscape. Many are also optimising their structures and processes for communications to improve effectiveness. These challenges are manifold and can require external support from consultants. While communication consulting is growing fast, it is rarely thor-

oughly studied (Frandsen et al, 2013; Hoffjann et al., 2021; Johansen, 2020; Verčič et al., 2018; von Platen, 2015). This year's study explored current developments in the growing area of external communication consulting. Especially on this topic, differences between the Nordic professionals and the European sample become clear.



5.1 Current situation of external consulting in communication

Current situation of external consulting in communication in the Nordics versus Europe



Figure 17 n = 235 (Nordics) / n = 1,558 (Europe). Q 6: How do you assess the current situation of external consulting in communications? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5. **highly significant differences between the countries considering the means (ANOVA/Scheffe post-hoc test, $p \leq 0.01$)

The majority of communications professionals in Europe believe that the need for external consulting (1) on stakeholder communications and (2) on structures and processes for communications in organisations is increasing (59.1% and 56.5%, respectively). Nordic professionals are slightly more cautious about the topic. Here, not even four in ten

(38.7% and 37.1% respectively) see an increase in demand. In Finland, for example, only 29.1% agree or strongly agree with it. However, the majority of the Nordic sample (53.0%) recognize that the industry is becoming increasingly diversified and complex and that ensuring quality in external consulting is becoming more challenging (54.9%).

5.2 Conflicts in communication consulting

The increasing complexity and insecurity are driving initiatives for quality improvements in the profession like the CMS III standard propagated by agency associations (ICCO, 2022). The consulting process can be modelled as an underlying client-consultant relationship upon which advice is generated in several steps (Zerfass et al., 2022b): the input phase covers prerequisites like available structures and people; the throughput phase includes the

realisation of consulting; while the output and outcome phase materialises (or not) in direct and long-term results (Donabedian, 1980; McLeod & Schapper, 2020). Clients as well as consultants need specific competencies to be able to productively work together and produce quality results (Ennsfellner et al., 2014). However, conflicts and dissatisfaction can derive on both sides (Zerfass et al., 2015).

Experiences of conflicts in consulting processes in the Nordics versus Europe

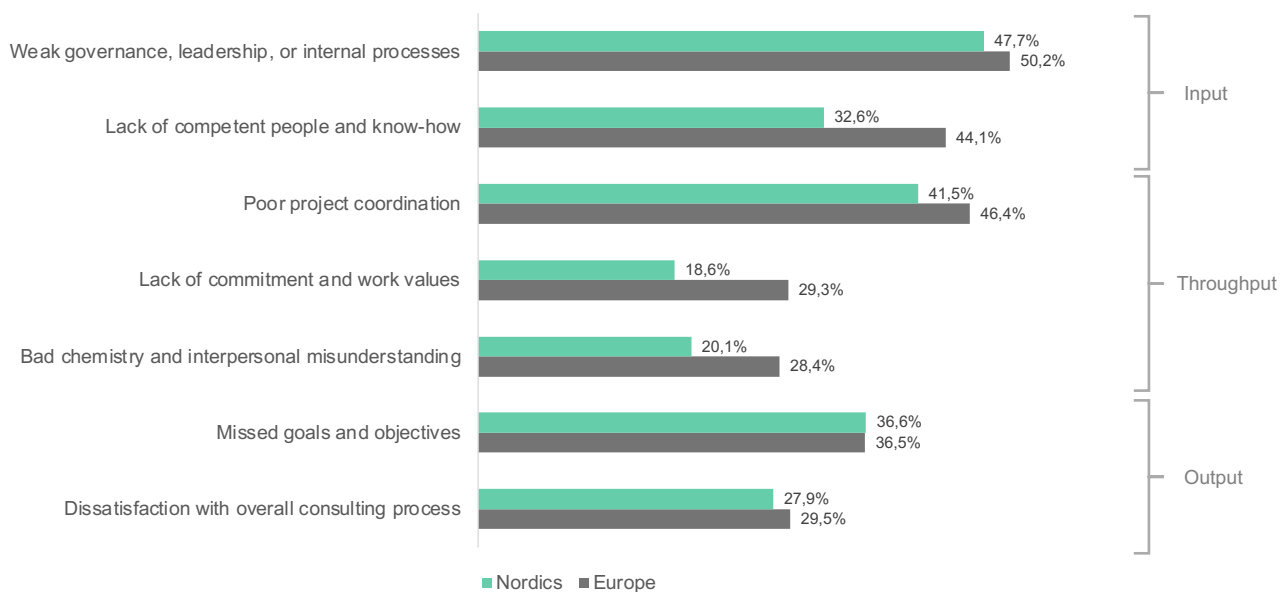


Figure 18 $n = 226$ (Nordics) / $n = 1,558$ (Europe). Q 8: Consulting does not always run smoothly – conflicts between consultants and clients may arise at different stages and decrease the overall quality of consulting. Based on your own professional experience as a client or consultant: How often have you been confronted with the following sources of conflict? Scale 1 (Never) – 5 (Very often).

Overall, communicators in the Nordic countries are less likely to face conflicts in the consulting process than their counterparts in Europe. However, as with professionals in Europe, nearly half of consultants or clients in the Nordics (47.7%) often face conflicts due to weak governance, leadership, or internal processes in the input phase. Poor project coordination ranks second (41.5%), and another third (36.6%) frequently struggles with missed goals and objectives. The top three causes of conflict for Nordic professionals are thus distributed across the three phases of the consulting process.

While for the average in Europe, the lack of competent staff and expertise ranks third and is perceived as a main source of conflict by 44.1%, Nordic communicators seem to be better positioned here, as only one-third see it as a frequent source of conflict. Interpersonal conflicts between consultants and clients are also less frequent in the Nordic countries. Interestingly, lack of commitment and work values ranks last among Nordic professionals, with only 18.6% experiencing this as a common source of conflict. In contrast, 3 in 10 professionals in Europe (29.3%) struggle with it regularly.

5.3 Securing the quality of consulting processes

Quality is created throughout the entire consulting process and can be determined on a functional level by various factors even before the actual consulting process (pre-requisites), during the consulting process (realisation), and

based on the results of the process. Moreover, the relationship between the client and the consultant can influence the quality of the whole consulting process (Zerfass et al., 2022b).

Importance of various factors to secure the quality of consulting processes in the Nordics versus Europe

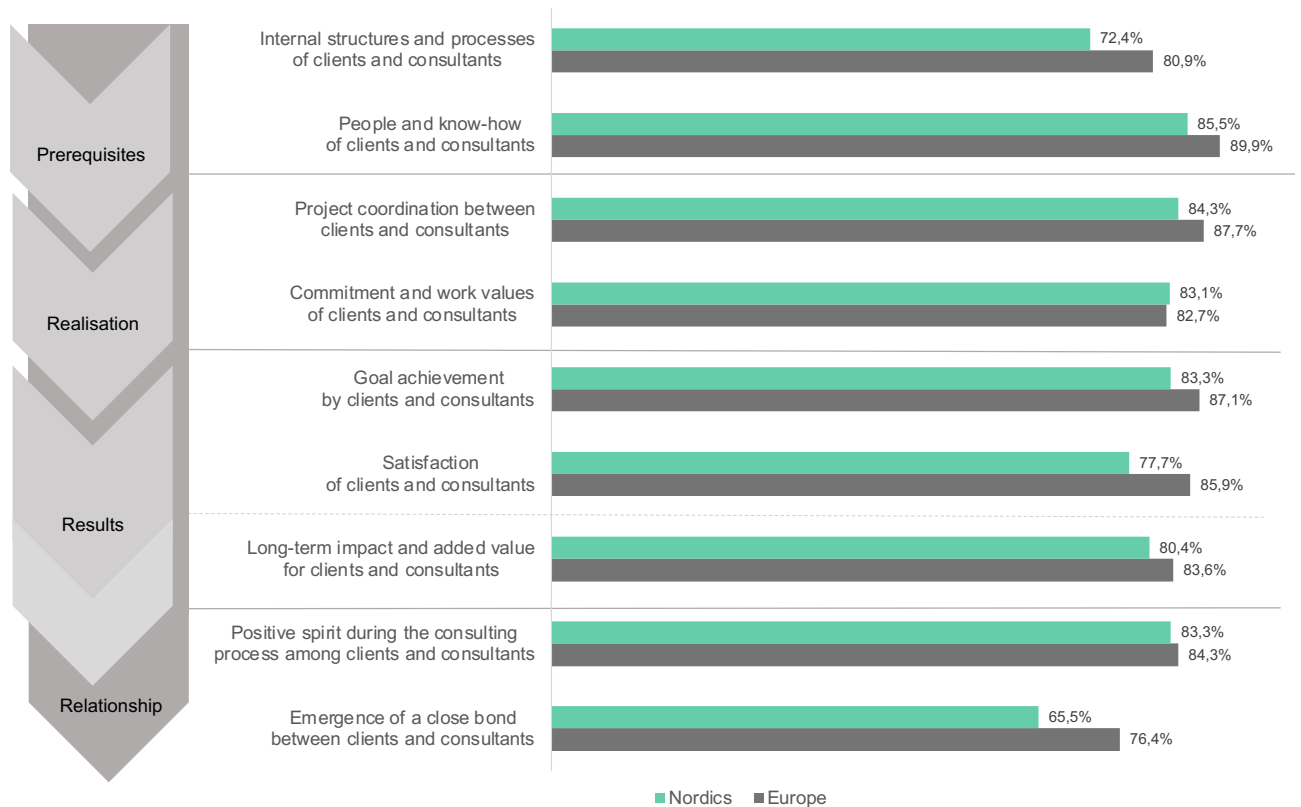


Figure 19 $n = 235$ (Nordics) / $n = 1,558$ (Europe). Q 7: What is, in your opinion, important to secure the quality of such consulting processes? Scale 1 (Not important) – 5 (Very important). Frequencies based on scale points 4-5.

When it comes to evaluating the quality dimensions, the Nordic communicators are again somewhat more reserved, always assigning them slightly less importance overall than the European average. People and know-how of clients and consultants as well as smooth project coordination can be identified as major determinants for consulting quality (85.5% and 84.3% respectively rate this as important or very important). Internal structures and processes of clients and consultants are also highlighted as an important prerequisite (72.4%), but more decisive for quality assurance are the commitment and work values of clients and consultants during the consulting process (83.1%). With regard to the results at the end of the consulting process, it is clearly more important for

communication professionals from the Nordics to achieve the set goals than to satisfy the consultant and client with the process. The European communicators, on the other hand, rate both factors as almost equally important.

A significant difference can be seen at the relationship level: While the positive team spirit during the counselling process is very important for both groups, the emergence of a close bond between consultant and client to secure quality is an important factor for only two-thirds of the Nordic professionals compared to three-fourths of the other professionals. Personal fit and connections therefore seem to be more important in the rest of Europe.



”



«It is valuable that this year's report also examined the use of external consultants. The channels and means of communication have become more diverse, and organisations may not have sufficient expertise in-house. With the increasing use of consultants, it is essential that there is trust between clients and consultants, clear goals, and mutually shared rules of the game. An interesting result is that Nordic communication professionals do not see the need for common quality standards in the industry to the same extent as other European professionals.»

Jarno Forssell

CEO of the Finnish Association of Communication Professionals;
ProCom

5.4 Quality standards for communication consulting

Quality standards for communication consulting Nordics versus Europe

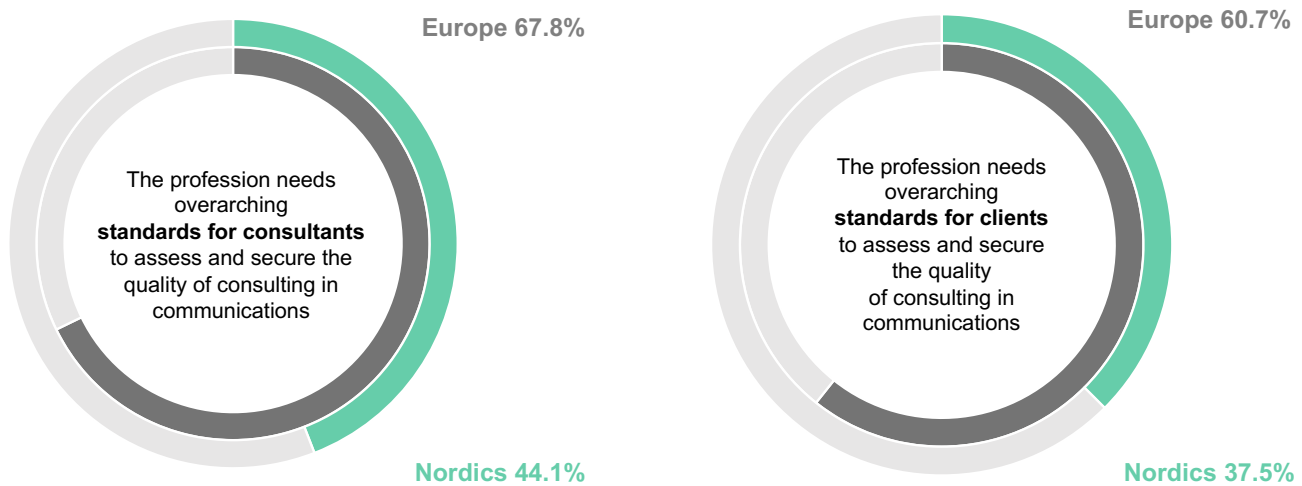


Figure 20 $n = 235$ (Nordics) / $n = 1,404$ (Europe). Q 9: What is your opinion on quality standards in the communications profession? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

The idea of introducing quality standards to assess and secure the quality of communications consulting resonates significantly less with Nordic professionals than with their other European counterparts: While 67.8% of European communicators agree with the statement that the pro-

fession needs overarching standards for consultants, and 60.7% believe that the profession also needs standards for clients, the percentages for Nordic professionals are only 44.1% and 37.5%, respectively.

Quality standards for communication consulting in the Nordics

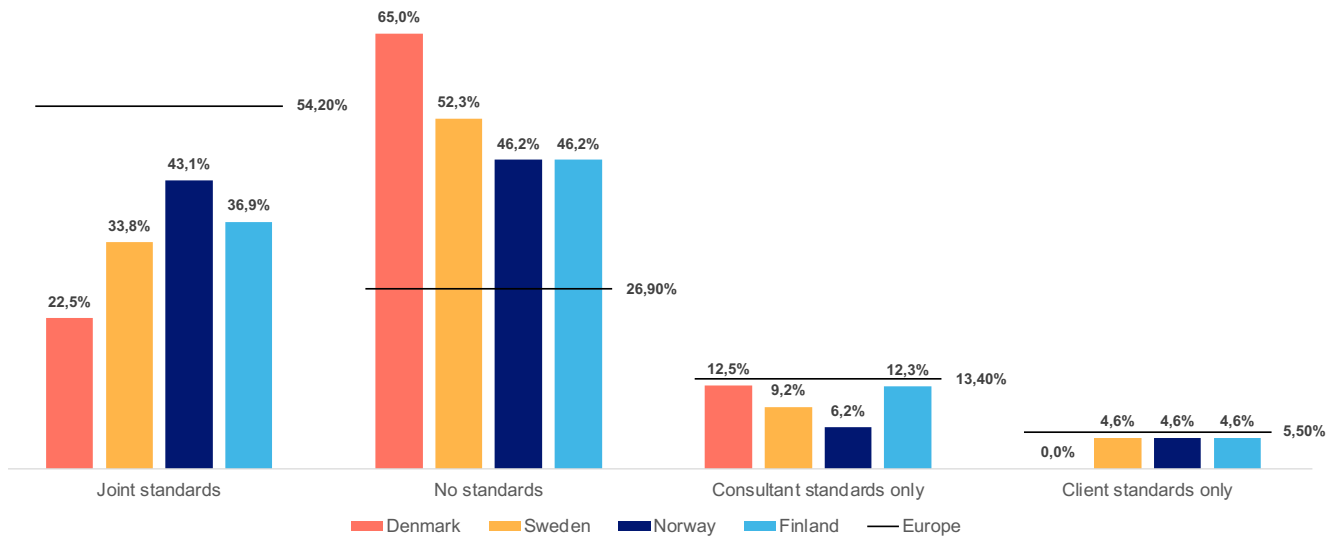


Figure 21 n = 235 (Nordics) / n = 1,404 (Europe). Q9: What is your opinion on quality standards in the communications profession? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

A closer look at the Nordic countries shows significant and visible differences. The majority of Nordic communications professionals (52.4%) are clearly opposed to quality standards, while one in two European professionals (54.2%) are in favour of common standards. In Finland and Sweden, the majority of respondents oppose quality standards (46.3% and 52.3%, respectively). An extreme case is Denmark, where two out of three communications professionals reject them. This is interesting because at the same time 62.5% of Danish professionals agree with the statement that it is becoming increasingly difficult to ensure the

quality of external advice. In Norway, there seems to be no clear opinion on the subject of quality standards: Almost as many professionals support common standards (43.1%) as opposed to them (46.2%).

However, a similar assessment of both groups is evident in the case of client standards only. The professionals consider these to be of little use. The same applies to the introduction of standards for consultants only. While Denmark and Finland come close to the European average of 13.4 %, the approval rate in Norway is clearly lower at 6.2 %.

6. Work practices in the communication profession

The COVID-19 pandemic has not only changed the working environment and practices of communications professionals but also raised new tasks and strategic issues that need to be addressed by the profession (Zerfass et al., 2022a). Remote work and flexible working conditions, as well as quick adaptation to new (online) communication technologies are some of the consequences and learn-

ings from COVID-19 (Bennett & McWhorter, 2021; Nagel, 2022). In the following, we will take a closer look at the personal work situation of communication practitioners in communication departments and agencies.

Personal work situation of communication practitioners in the Nordics versus Europe

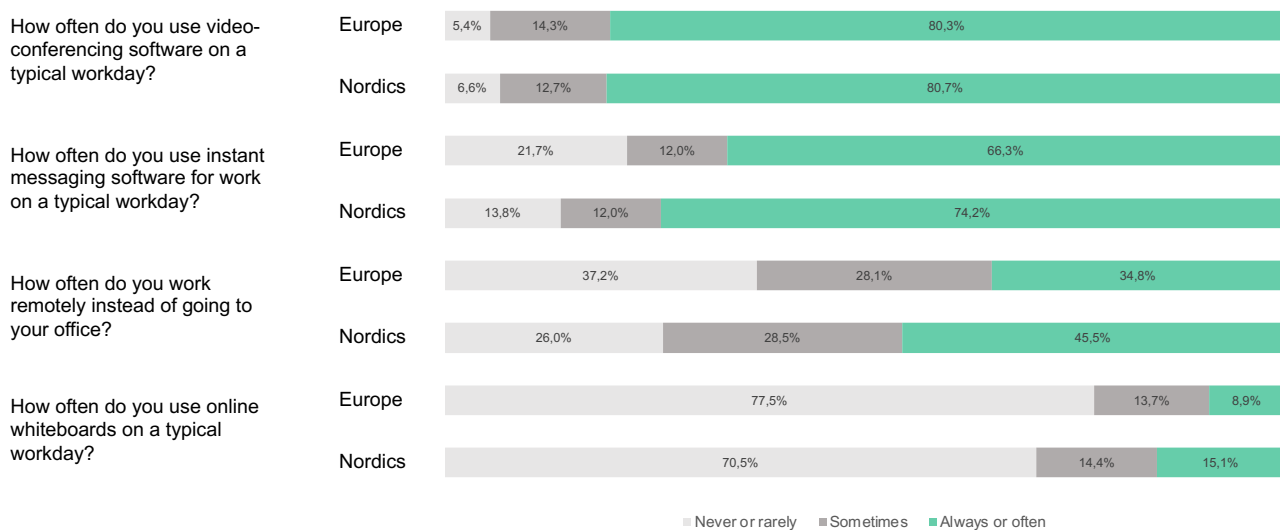


Figure 22 n = 251 (Nordics) / n = 1,649 (Europe). Q 18: Please tell us about your personal work situation when offices are open (i.e., if there are no closures due to a pandemic, extreme weather etc.). Scale 1 (Never) – 5 (Always).

Catharised by the pandemic, flexible and remote work as well as real-time collaboration are now well established in the profession. This has increased the use of digital tools like video-conferencing during the typical work days of practitioners (see also Zerfass et al., 2021) – now used always or often by a strong majority of communicators in the Nordics (80.3%) as well as in the rest of Europe (80.7%).

Instant messaging software such as iMessage, Slack or company-specific solutions, on the other hand, is used by only two-thirds of Nordic professionals during a typical working day. One-fifth never or rarely use them. The European average attributes much more importance to these tools, with 74.2% of the professionals using them daily or almost daily.

The use of online whiteboards such as Invision, Miro or MS Whiteboard has not been established among European professionals and even less among Nordic communicators. Only 8.9% of communicators in the Nordic countries use these tools often or always in a typical working day.

Taking a look at the professionals' work environment, the percentage of professionals in the Nordic countries who prefer to work remotely (34.8%) is almost as high as the percentage of professionals who prefer to work in the office (37.2%). The majority of European professionals, on the other hand, clearly prefer to work remotely (45.5%).

About the Nordic Alliance for Communication & Management (#NORA)

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 Denmark, Finland, Norway 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:

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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) 2022 and national communication associations of Norway, Denmark, Finland and Sweden. The report has been prepared by Winni Johansen (Professor of corporate communication, Aarhus and Oslo; and ECM national research collaborator), Finn Frandsen (Professor of corporate communication, Aarhus and Oslo; and ECM national research collaborator), Alexander Buhmann (Associate Professor of corporate communication, BI Norwegian Business School, director at #NORA, and member of the ECM core research team) and Sabrina Doberts (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 second time 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

(Sveriges Kommunikatörer) is a membership organisation with the vision that communication is recognized as the necessary and strong force that drives change and moves 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 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 globally. We cooperate with universities and support research within the field of communication.

www.sverigeskommunikatorer.se/om-oss/in-english

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 facilitating 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 by 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 in Norway. The approximately 4200 members work in both the 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 publishes the magazine "Kommunikasjon" and the podcast "Kommunikasjonspodden".

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



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