

Swiss Corporate Communication and Public Relations Practice Monitor 2013 Report

An initiative by BPRA, HarbourClub,
SPRI, pr suisse and USI

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About the Swiss Corporate Communication and Public Relations Observatory

The Swiss Corporate Communication and Public Relations Observatory – an initiative of BPRA, HarbourClub, pr suisse, SPRI, and USI – generates knowledge about the state and evolution of the communication profession in Switzerland with the aim of supporting its development. The knowledge created and disseminated by the Observatory contributes to raising standards throughout the profession, honing educational and training curricula, identifying research needs, and promoting the industry as a whole.

Association of PR Agencies in Switzerland (BPRA)

The Association of Swiss PR Agencies (BPRA) unites the leading PR agencies in Switzerland – namely, those who have a proven track record in terms of size, experience, and quality. All BPRA agencies commit themselves to CMS II quality certification. BPRA also aims to achieve a high level of professional advisory skills and market transparency among its members. www.bpra.ch

[Association of PR Agencies in Switzerland \(BPRA\)](http://www.bpra.ch)

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HarbourClub

HarbourClub offers its members – namely, chief communications officers of Swiss organizations – an exclusive networking platform through which these leading communications professionals can exchange personal experiences, address new and future challenges in corporate communications, and promote informal contacts among professional colleagues. An additional goal is to professionalize and distinguish the corporate communications function. www.harbourclub.ch

[HarbourClub](http://www.harbourclub.ch)

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Swiss Public Relations Institute (SPRI)

SPRI has been providing undergraduate, postgraduate and continuing education for communication professionals since 1969. SPRI takes a holistic approach, offering an education that is both academic and based on current public relations practice. Together with HWZ, KV Bildungsgruppe Schweiz, SEC Lausanne and HEG Fribourg, which conduct the SPRI courses, SPRI advocates first-class PR education and training. www.spri.ch

[Swiss Public Relations Institute \(SPRI\)](http://www.spri.ch)

www.spri.ch

pr suisse

pr suisse (Swiss Public Relations Association) is Switzerland's national professional association of PR and communications specialists with about 1,600 members. As the only PR trade association in Switzerland that includes representatives from a diverse range of agencies, corporations, organizations and administrative entities, pr suisse serves as the main interest group representing the Swiss public relations industry. Its mission is to safeguard and advance the high standing of the PR profession, the general acceptance and appreciation of PR activities, as well as the sound quality of education and continuing professional development programs. www.prsuisse.ch

[pr suisse, the Swiss Public Relations Association \(SPRV\)](http://www.prsuisse.ch)

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Università della Svizzera italiana (USI)

The Università della Svizzera italiana (USI), founded in 1996, comprises four faculties: Economics, Communication sciences, and Informatics in Lugano as well as Architecture in Mendrisio. USI has a total student population of more than 2,800 from 35 countries and a teaching staff of 650 professors, lecturers, and assistants. Benefiting from its unique geographic and cultural location, USI is a distinguished multilingual and multicultural university with a broad international outlook. www.usi.ch

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TheBrandTicker is an online platform for real-time brand analytics. TheBrandTicker links data from social, online and print media with financial market data and delivers quantitative Information about the image, issues and the economic value of brands. The tool provides a unique insight into the relationship between reputation and its impact on the financial success of companies

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About this report

The following five main aims guided the 2013 Swiss Corporate communication and Public Relations Practice Monitor.

- To investigate the profession's practices and their evolution
- To explore the different communication organizational structures and their relationship with the practice of the profession
- To evaluate the integration of the communication practice within the management practice
- To identify trends influencing communication practice
- To detect the needs for educational and personal development

Survey Methods

The survey was administrated online from December 7, 2013 to January 7, 2014. Questions were available in four languages: German, French, Italian, and English.

Compared to the 2011 edition, roughly $\frac{1}{3}$ of the questions were changed to investigate new aspects; the remaining questions remained the same in order to investigate the evolution of the practices over time. Overall, the survey included 37 questions structured in 5 main parts: (1) Domain, (2) Structure, (3) Management, (4) Professional development, (5) Demographics. The number of questions (excluding routing and demographics questions) respondents had to answer varied according to their profile. Organization's CCOs: 27; Organization professionals with budget: 27; Organization professionals without budget: 13. Agency's CEOs: 22; Agency professionals with budget: 22; Agency professionals without budget: 11. Professionals from public administration, non-profit organizations, and/or non-governmental organizations were asked to answer questions formulated under the organization category. The formulation of each question was differentiated in order to take into consideration the 6 different respondent profiles. Respondents required approximately 10 to 20 minutes completing the questionnaire, depending on their profile.

Sample

Approximately 3,500 professionals were invited to complete the questionnaire. Invitations were sent directly by the Observatory partners (SPRI, SPRV, BPRA, HarbourClub and USI) using their databases.

The survey was also publicized on partners' websites as well as through the main Swiss trade online portals.

Ultimately, 392 valid replies (approximately a 11 % response rate) were analyzed.

Analysis

Descriptive statistics were used to analyze the data. The 29 questions of the main part of the questionnaire were also cross-analyzed with most of the demographic data that emerged from the remaining 15 questions. Some of the 29 questions were cross-analyzed with non-demographic data as well (e.g., data signaling the level of strategic focus in the communication practice). Where appropriate (e.g., crosstabs, difference in means, etc.) statistically significant results (e.g., Pearson's chi-square, Cramer's V, Kendall's rank correlation, independent sample t-tests, etc.) are reported in the text using the following convention: (*) where $p \leq 0.1$; (**) where $p \leq 0.05$; (***) where $p \leq 0.01$. In addition, some totals may not equal 100% due to rounding.

Authors

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- Corina Atzli, Head Corporate Communications, Bühler Management AG & President Harbourclub (both until March 2014)
- Peter Eberhard, PEPR Peter Eberhard Public Relations & President pr suisse/ SPRI
- Roman Geiser, CEO & Managing Partner Farner Consulting Ltd. & President BPRA (until end 2013)
- Martin Zahner, Chairman YJOO Communications AG

Quotation

Lurati, F., & Mariconda, S. (2014), Swiss Corporate Communication and Public Relations Practice Monitor: 2013 Report. Zürich and Lugano: Swiss Corporate Communication and Public Relations Observatory

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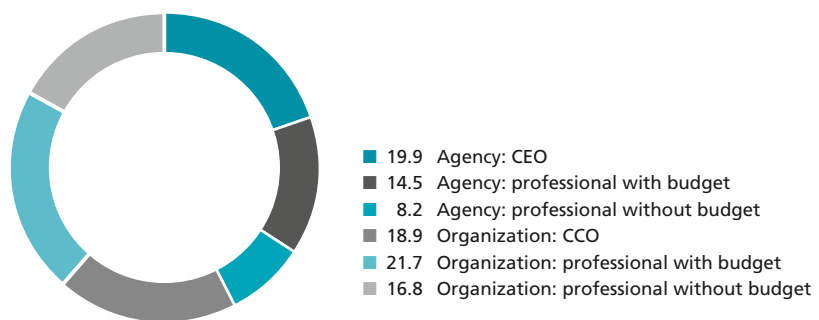
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1. Respondents' general profile

A total of 392 communication professionals took part in the third Swiss Observatory Practice Monitor; 225 (57.4%) of these respondents work in organizations while the remaining 167 (42.6%) work in PR and communication consultancies. The survey reached all linguistic regions of Switzerland in similar proportions as in 2011 (i.e., 79.6% German, 17.6% French, 2.6% Italian and 0.3% Rumantsch-speaking part of Switzerland) [1].

Similar to the two previous editions of the Practice Monitor, the survey attracted high participation by organizations' CCOs and agencies' CEOs (18.9% and 19.9%, respectively). Also consistent with the last editions, the majority of respondents are professionals with budget who work in organizations (21.7%) [2].

Respondents' position in the organization (%)



Taking a closer look at the respondents working in organizations, most (77.3%) work at the corporate level, while roughly one fourth (22.7%) work at the divisional/unit level [3]. When it comes to the type of organization in which respondents work, 31.6% work in joint stock companies, 25.8% in government-owned organizations or political institutions, 21.3% in non-profit organizations or associations, 15.6% in private companies, and 5.8% in other types of organizations. Compared to the 2011 edition of the report, non-profit organizations or associations make up a slightly higher proportion (in 2011: 17%) and private companies make up a lower proportion (in 2011: 21.3%) [4].

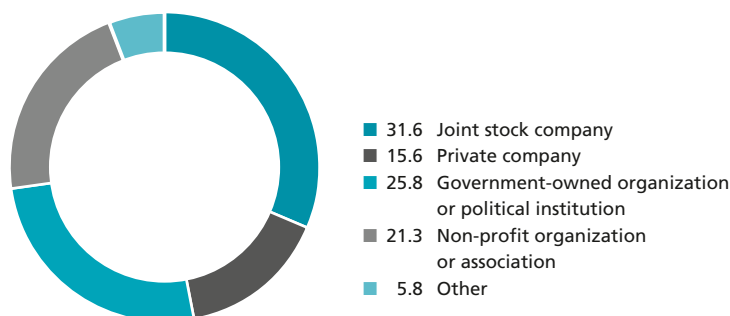
[1] Q36 (asked to all): In which part of Switzerland are you normally based? Response options: German-speaking part, French-speaking part, Italian-speaking part, Rumantsch-speaking part.

[2] In order to make the survey more effective, it was designed for six different professional profiles: (1) Agency: CEO; (2) Agency: Professional with budget; (3) Agency: Professional without budget; (4) Organization: CCO; (5) Organization: Professional with budget; and (6) Organization: Professional without budget. In the current report, footnotes will indicate (where applicable) which questions were asked to which profiles (numbered 1 to 6). If no specific reference to different profiles is made, "asked to all" will signal that all six profiles were asked to answer.

[3] Qf (asked to 4, 5, and 6): Do you work at the corporate OR divisional/unit level? Response options: Corporate level, Divisional/unit level.

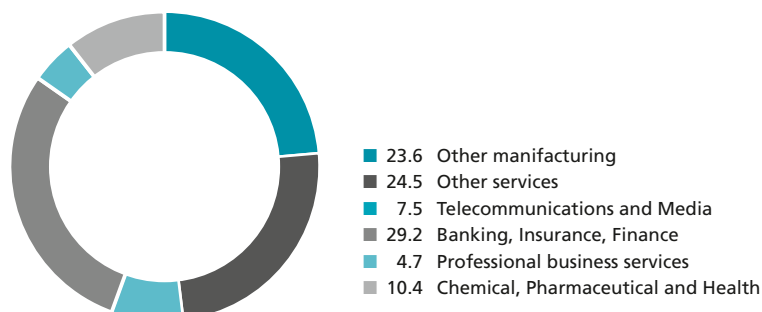
[4] Qc (asked to 4, 5, and 6): In which type of organization do you work? Joint stock company (multiple owners, quoted on the stock market), Private company (small number of owners, not on the stock market), Government-owned organization or Political institution, Non-profit organization or association, Other.

Respondents by type of organization (%)



As revealed by further analysis, among respondents working in joint stock or private companies; 29.2% work in the Banking, Insurance and Finance sector – the most represented sector in the sample this year – followed by 24.5% in other services (e.g., energy and water supply, transportation, tourism, education) and 23.6% in other manufacturing sectors (e.g., agriculture, food, textile, electronics) [5].

Respondents by sector (%)

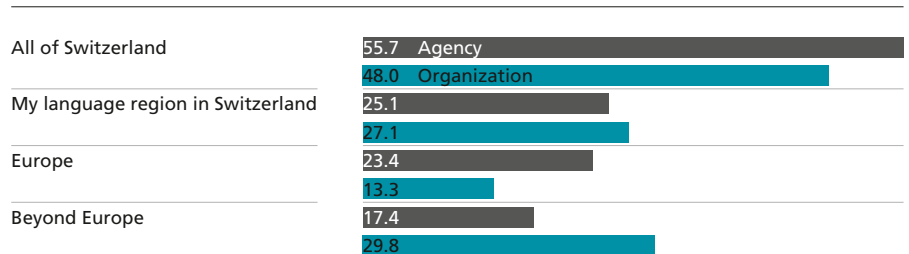


Also similar to the previous editions, organizations today are operating at a more international level than agencies and consultancies. According to the data, more organizations than agencies work at the worldwide level (29.8% vs. 17.4%, **). On the other hand, agencies more often work at the European level (23.4% vs. 13.3%, *) and Swiss (55.7% vs. 48%) levels. According to the data, organizations and agencies work at the regional level in similar proportions (27.1% and 25.1%, respectively) [6].

[5] Qd (asked to 4, 5, and 6 working in joint stock or private companies): In which sector do you work? Response items: Telecommunication and Media; Bank, Insurance, Financial Sector; Professional Business Services; Chemical, Pharmaceutical, and Health; Other services (consists of: Energy and water supply, Construction, Wholesale, Retail, Transportation, Tourism, Education, Arts, Entertainment and recreation, and Other service activities); and Other manufacturing (including Agriculture, Food, Textile, Electronics, Luxury goods, Machinery, and Other manufacturing).

[6] Q37 (asked to all): What is the reach of your professional activity? (Multiple answers allowed) Response items: My language region in Switzerland, All of Switzerland, Europe, Beyond Europe.

Reach of business activities (%)



Looking at the age of respondents [7], the majority are between 46 and 50 years old (19.1%), followed by respondents aged between 36 and 40 (16.6%) and between 41 and 45 (16.3%). Compared to the 2011 sample, the age groups are much more evenly spread among agencies and organizations. In 2011, the sample showed that younger professionals were much more present in organizations than in agencies; this is no longer the case in this year's sample. When it comes to older professionals, there is still a higher percentage of professionals between 56 and 60 (9.6% vs. 4.9%) as well as professionals older than 60 (6% vs. 1.8%) in agencies. These results (*) confirm the fact that older professionals are more present in agencies than in organizations.

Age of respondents in organizations and agencies (%)

	Average	Organization	Agency
Up to 30	11	8.9	13.8
31–35	15.3	16	14.4
36–40	16.6	17.8	15
41–45	16.3	19.1	12.6
46–50	19.1	20	18
51–55	11.2	11.6	10.8
56–60	6.9	4.9	9.6
Over 60	3.6	1.8	6

The age of respondents in organizations and agencies is related to the number of years of experience that professionals have [8]. Organizations and agencies have a similar proportion of workers with fewer than five years of experience (16.4% vs. 18.6%, **). Organizations have a higher proportion of workers with between six and ten years of experience (26.7% vs. 16.2%, **), whereas agencies have more workers with more than ten years of experience (65.3% vs. 56.9%, **).

[7] Q30 (asked to all): How old are you?

[8] Q32 (asked to all): How many years of experience do you have in communication management/public relations?
Response items: Fewer than 5 years, 6 to 10 years, More than 10 years.

Years of experience in organizations and agencies (%)

	Average	Organization	Agency
Less than 5 years	17.3	16.4	18.6
6 to 10 years	22.2	26.7	16.2
More than 10 years	60.5	56.9	65.3

When it comes to respondents' educational qualifications, the data show that 61.1% of Swiss professionals have an academic degree [9]. Compared to the 2013 European Communication Monitor (ECM) [10] results, it is evident that the proportion of European professionals with an academic degree is much higher (92.8%). Further comparing the results with the 2013 ECM survey, it appears that 26.5% of European professionals have a bachelor's degree whereas only 8.2% of Swiss professionals have one. The same can be said for professionals holding a master's degree: 59.9% of Europeans versus 50.3% of Swiss. When it comes to doctorate degrees, the percentages are similar (ECM: 6.4% vs. 5.6%). Overall, these comparisons reflect the differences found in 2011.

The percentages relating to educational qualifications do not differ greatly across agencies and organizations. Results (**) show that more professionals working in organizations have a CAS certificate (12.9% vs. 1.8%), but a greater proportion of professionals working in agencies have a master's (55.7% vs. 46.2) or doctorate (6.6% vs. 4.9%) degree.

Educational qualification (%)

Doctorate	5.6
Master's, Diploma	50.3
Bachelor's (B.A.)	8.2
CAS	8.2
Federal Certificate	10.5
Federal Diploma (eidg. Diplom)	12.5
No qualification	4.8

Respondents were also asked to specify their communication qualifications [11]. More than one third of the respondents claimed to have an academic degree in communication (38.3%). Compared to the 2013 ECM survey results, it appears that the percentage of Swiss professionals with an academic degree in communication is lower (ECM: 48.4%). Yet compared to the GAP VII results [12], it appears that the percentage of Swiss professionals with an academic degree in communication is slightly higher than in the U.S. (GAP VII: 31.9%). Finally, 18.8% of Swiss professionals claim to have no communication qualification.

[9] Q33 (asked to all): Please state the highest qualification you hold. Response items: No qualification, Federal Certificate (eidg. Fachausweis, Brevet fédéral, attestato professionale federale), Federal Diploma (Eidg. Diplom), CAS (Certificate of Advanced Studies), Bachelor (B.A.), Master (M.A., M.Sc., Mag., M.B.A.), Diploma (Lizenziat), or Doctorate (Ph.D., Dr.).

[10] Zerfass, A., Moreno, A., Tench, R., Vercic, D., & Verhoeven, P. (2013). European Communication Monitor 2013. A Changing Landscape – Managing Crises, Digital Communication and CEO Positioning in Europe. Results of a Survey in 43 Countries. Brussels: EACD, EUPRERA, Helios Media.

[11] Q34 (asked to all): Please state the communication qualifications you hold. Response items: PR-F, PR-B, CAS (Certificate of Advanced Studies) in communication, Professional certificate in other communication discipline, Academic degree in communication (Bachelor/Master/Doctorate).

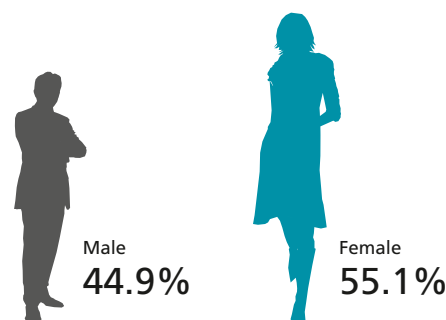
[12] Swerling, J., Thorson, K., Tenderich, B. (2012). Seventh Annual Public Relations Generally Accepted Practices (G.A.P) study, GAP VII. Los Angeles: University of Southern California.

When comparing the differences between agencies and organizations in relation to the communication qualification, the data show that a higher proportion of professionals working in organizations hold a CAS degree in communication (26.8% vs. 8.1%, ***). Respondents working in agencies are more likely to have no communication degree (28.8% vs. 11.3%, ***).

Communication qualification (%)

Academic degree in communication	38.3
PR-F	15.0
PR-B	16.9
CAS in communication	18.8
Prof. cert. in other com. discipline	12.3
No communication qualification	18.8

The majority of communication professionals in the sample are women (55.1%) [13]. Compared to the 2010 (58.7%) and 2011 (60.2%) results, in 2013, the proportion of women and men in the sample is more balanced.



The percentage of women is significantly higher in organizations than in agencies (63.6% vs. 43.7%, ***).

Looking at the different types of organizations, the percentage of women is higher in government-owned organizations or political institutions (69%) as well as non-profit organizations or associations (68.8%). In joint stock companies, 56.3% of professionals are women.

[13] Q31 (asked to all): What is your gender?

The proportion of women among younger professionals is much higher; for instance, 70.9% of professionals up to 30 years old are women (vs. 20.9% of men, ***). The proportion of professional women is higher in all younger age groups – up until the age group between 46 and 50 (56% vs. 44%, ***). After this age group, men become the majority. In fact, the percentage of men between 56 and 60 is much higher (74.1% vs. 25.9%, ***). The same is true with professionals above 61, as this group includes a much higher proportion of men (78.6% vs 21.4%, ***).

52.7% of organizations' CCOs are women (average number of women in organizations: 63.6%) and 32.1% of agencies' CEOs are women (***) (average number of women in agencies: 43.7%).

A significant number of respondents (65.8%) belong to a professional association [14]. Similar to past years, the majority of respondents are affiliated with pr suisse (48.7%), followed by BPRA (12.8%), and other national associations (10.7%).

Professional affiliation (%)

pr suisse	48.7
BPRA	12.8
HarbourClub	5.1
SVIK/ASCI	4.3
SPAG/SSPA	4.1
Other national com. assoc.	10.7
Other international com. assoc.	5.6

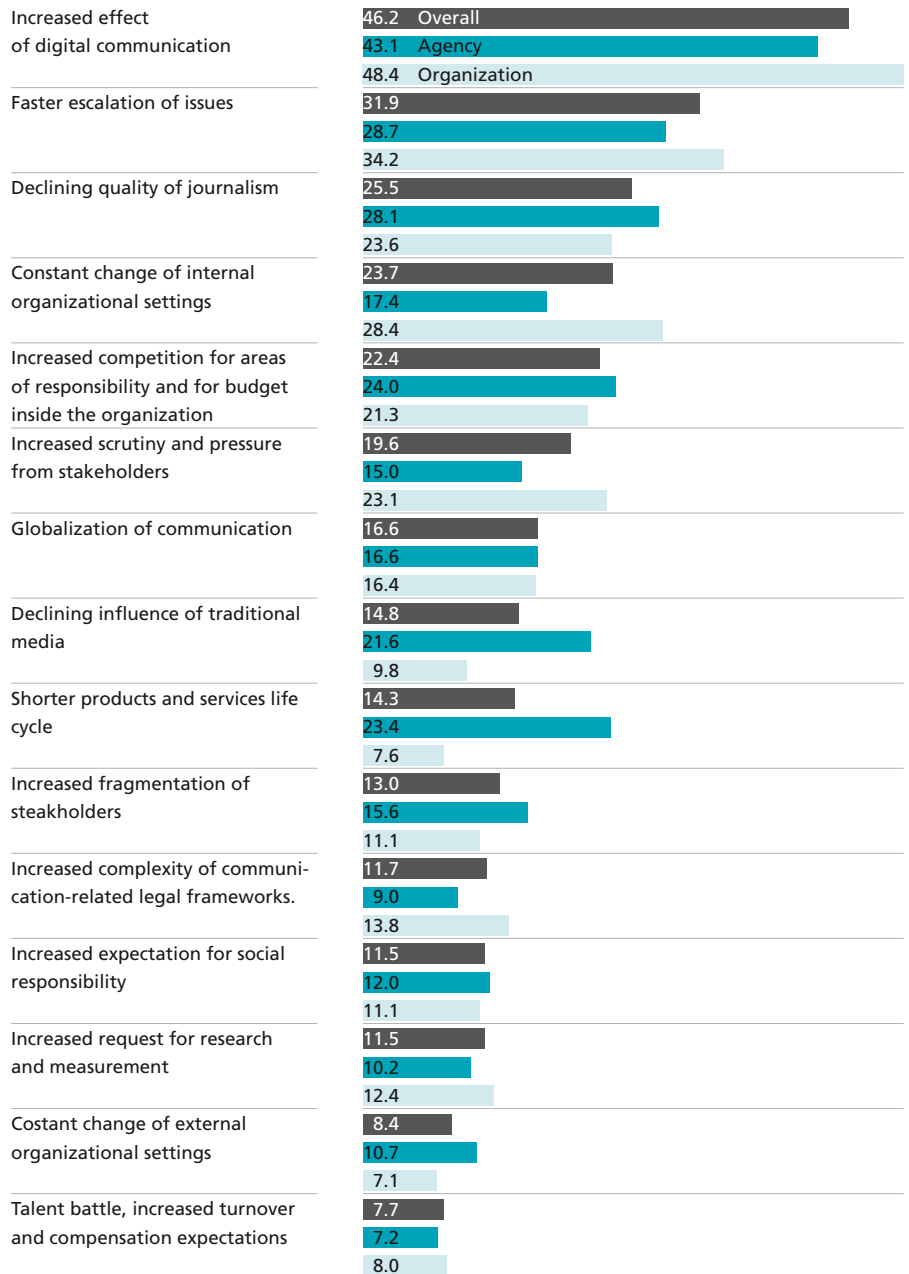
[14] Q35 (asked to all): Are you a member of a professional organization? For the possible response options, see the chart "Membership in professional organizations."

2. Perceptions from the industry

Respondents were asked a series of questions in order to understand their perceptions regarding some specific aspects of their profession. Assessing perceptions is helpful for understanding how professionals make sense of their environment (trends affecting the profession) as well as their role within the organization and the impact of their activity (consideration of CC/PR recommendations). In order to indirectly assess the perceived level of satisfaction with their profession, we also asked respondents whether they would recommend working in corporate communication/public relations to their children.

2.1 While losing some importance, digital communication remains the main trend affecting corporate communication and public relations activities

Industry trends (%)



When considering trends, it is interesting to look at how they change over time. Overall, the trends perceived to be the most important by all respondents have remained stable since 2011 [15]. “Increased effect of digital communication” remains the trend most acknowledged by communication professionals as being the most important (46.2%) despite the fact that the proportion of professionals acknowledging it decreased from 54.4% in 2011 to 46.2% this year. The second most important trend for all respondents is “faster escalation of issues” (31.9%), which has remained stable since 2011 (30.3%). The third most important trend, introduced for the first time in the present edition of the survey, is the “declining quality of journalism” (25.5%). All three of these trends can be related to the faster pace of information flows and the related role of digital and social media, which – among other factors – might also have an effect on the (perceived) quality of journalism.

Other trends that have changed since 2011 are the “increased scrutiny and pressure from stakeholders,” which decreased from 26.8% in 2011 to 19.6% this year, and the “increased competition for areas of responsibility and budget inside the organization”, which instead grew from 16.6% in 2011 to 22.4% this year.

Although a certain level of agreement exists on the most important trends as well as on many other trends and their relative importance, some interesting differences emerge between organizations and agencies. As in 2011, respondents working in organizations more often mentioned the “constant change of internal organizational settings” (28.4% vs. 17.4%, **) as well as the “increased scrutiny and pressure from stakeholders” (23.1% vs. 15%, **). Respondents working in agencies instead mentioned the “shorter products and services life cycle” (23.4% vs. 7.6%, ***) and the “declining influence of traditional media” (21.6% vs. 9.8%, ***) more often.

When looking at the different types of organizations, respondents working in non-profit organizations attribute a greater importance to “increased fragmentation of stakeholders” (22.9%, **). However, respondents working in joint stock companies see the “constant change of internal organizational settings” as being highly important (47.9%, ***). Respondents working in private companies attribute a greater importance to the “increased effect of digital communication” (57.1%) and to the “increased complexity of communication-related legal frameworks” (22.9%).

Looking at the different sectors, it appears that – as in 2011 – companies in the Banking, Insurance and Finance sector perceive the “increased scrutiny and pressure from stakeholders” to be a highly relevant trend (38.7%, *). Also similar to 2011, companies in the Telecommunications and Media sector attach a great importance to the “increased effect of digital communication” (75%). Respondents working in other manufacturing sectors (e.g., agriculture, food, electronics, machinery) see the “globalization of communication” (36%, **), and the “constant change of internal organizational settings” (60%, *) as important trends.

[15] Q22 (asked to all): Which of the following trends are affecting your activity the most? (Pick 3) For the possible response options, see the chart “Industry Trends.” The ten trends were defined based on ECM 2009 (Q6), PRSA 2006 (p. 5) and Balmer, J.M.T. and Gray, R.G. (1999) Corporate Identity and Corporate Communications: Creating a Competitive Advantage. *Corporate Communications: An International Journal*, 4 (4): 171–176.

2.2 One third of communication professionals believe they are taken seriously by senior management

In line with the results from 2011, only about one third (35.1 %) of communication professionals believe that senior management takes their recommendations seriously [16]. Looking at the different professional profiles, 40.5 % (**) of the CCOs in the sample believe that their recommendations are taken seriously.

Consideration of CC/PR recommendations by senior management (%)

Overall	35.5
CCO	40.5
Professional with budget	30.5
Professional without budget	34.5

The perceived consideration of CC/PR recommendations by senior management varies according to the organizational configuration between the Corporate communication and Marketing departments (*). For example, 53.7 % of the professionals working in organizations in which Corporate communication drives Marketing believe their recommendations are taken very seriously; in organizations in which Marketing and corporate communication departments are the same department, 40 % of professionals claim their recommendations are taken very seriously. In all other configurations, the percentage is lower than the average (i.e., 35.1 %).

2.3 A great majority of professionals would recommend working in CC/PR to their children

When asked whether they would recommend working in corporate communication/public relations to their children, 82.7 % of the respondents answered that they would [17]. This percentage does not change in significant ways across organizations and agencies, types of organizations, or sectors. In addition, the proportion of professionals who would recommend their profession to their children remains relatively stable across age, gender, and years of experience. Some slight variations can be observed in relation to respondents' educational qualifications (**): 89.5 % of those without any educational qualifications, and 90.2 % of those with a professional certificate would make the recommendation, whereas only 54.5 % of those with a PhD would.

Rather, this proportion varies in relation to the degree to which respondents believe that CC/PR recommendations are taken seriously by top management, becoming 91.5 % (**) among those who believe that recommendations are “taken very seriously.”

[16] Q21 (asked to 4, 5, and 6): In your organization, how seriously are corporate communication/PR recommendations taken by senior management (chairperson/CEO/executive board members)? (1 = not taken seriously at all; 5 = taken very seriously; I don't know.) Scale points considered 4–5 (average of the two). Adapted from GAP VI (2009)(Q7) and ECM 2011 (Q6).

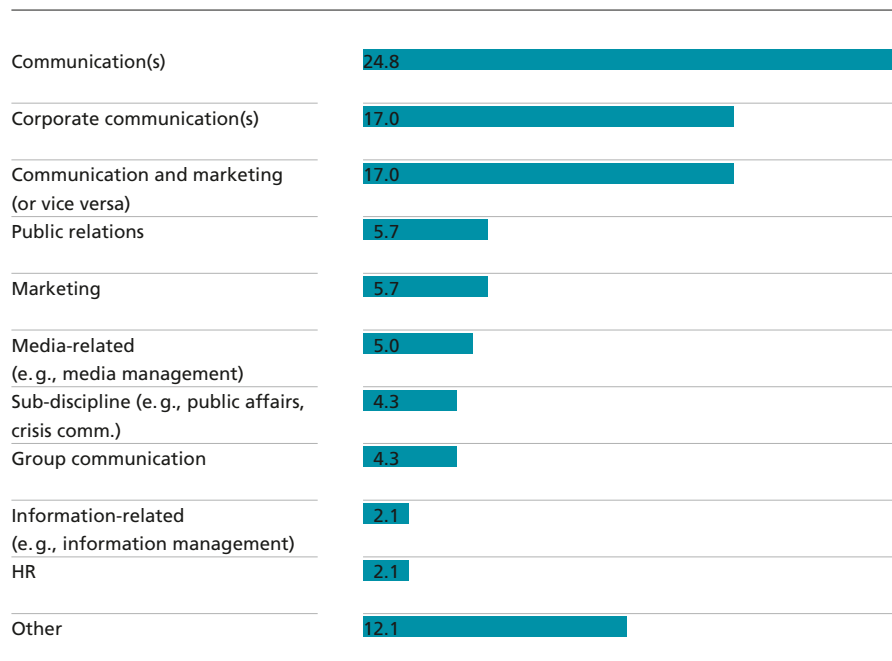
[17] Q29 (asked to all): Would you recommend to your daughter/son to work in corporate communication/public relations? (Yes / No)

3. Structure

3.1 Department's name: Communication is in, public relations is out

The name of the department [18] in which professionals work is most often called communication(s) (24.8%), corporate communication(s) (17%), or communication and marketing (or vice versa) (17%). Yet communication professionals also often work in departments that have names not related to communication or in other departments (12.1%), such as, among many possible examples, internal service or cultural service.

Departments' names (%)



3.2 Presence of CCOs on the executive board driven by private companies and NPOs, while still an exception in joint stock companies

In line with results from 2011, most CCOs claim to be members of either the executive board (28.4%) or the extended executive board (23%) [19]. When not part of the executive board, the majority of CCOs report directly to the CEO (37.8%). Some differences in the proportion of CCOs sitting on the executive board are evident across the various types of organizations. For instance, in joint stock companies, only 9.1% of CCOs are members of the executive board; almost half (45.5%) of the CCOs in joint stock companies report instead to the CEO. The proportion of CCOs who are members of the executive board is much higher in private companies (43.8%) and non-profit organizations or associations (47.4%)

[18] Q13 (asked to 4 and 5): What is the name of your department? (open answer).

[19] Q15 (asked to 4): What is your hierarchical status? Response Items: I'm a member of the executive board; I'm a member of the extended executive board; None of the above, but I report directly to the CEO; I report to another executive board member. To whom? (open answer); None of the above. I report to (open answer). Adapted from ECM 2011 (Q15).

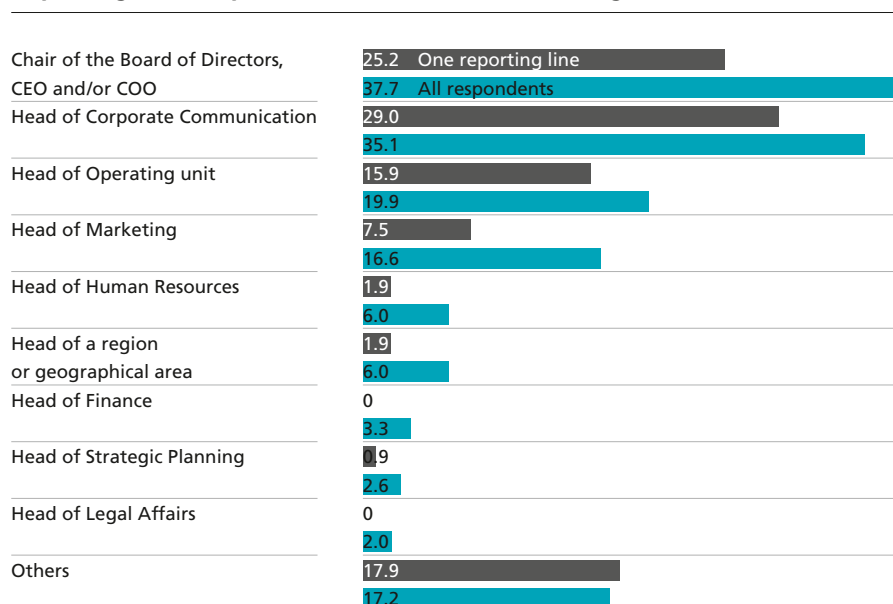
CCO's hierarchical status in different types of organization

	I'm a member of the executive board	I'm a member of the extended executive board	None of the above, but I report directly to the CEO	None of the above, but I report to another board member	Other
Average	28.4	23	37.8	8.1	8.1
Joint stock companies	9.1	27.3	45.5	9.1	9.1
Private companies	43.8	18.8	25	12.5	12.5
Government-owned organizations or political institutions	14.3	28.6	42.9	14.3	14.3
Non-profit organizations or associations	47.4	15.8	36.8	0	0

3.3 Professionals (not CCOs) often report to the C-Suite or the Head of CC

When looking at the reporting lines of professionals with and without budget [20] (n = 151), also in line with 2011, a large percentage report to the Chair of the Board of Directors, CEO, and/or COO (37.7%), followed by the Head of Corporate Communication (35.1%), Head of Operating unit (19.9%), Head of Marketing (16.6%), and others (17.2%).

Reporting lines of professionals with/without budget (%)



[20] Q17 (asked to 5 and 6): To whom do you report? Response Items (more options possible): Chair of the Board of Directors, CEO, and/or COO; Head of Corporate Communication, Head of a region or geography, Head of Operating Unit, Head of Finance, Head of Human Resources, Head of Legal Affairs, Head of Marketing, Head of Strategic Planning, Other. Adapted from GAP VI (2009).

When looking at professionals that have selected only one option (i.e., have only one reporting line), in line with the results obtained last year a relatively big proportion of them reports directly to the Chair of the Board of Directors, CEO, and/or COO (25.2%), the Head of Corporate Communication (29%), the Head of the Operating Unit (15.9%), or the Head of Marketing (7.5%).

Always considering professionals with only one reporting line, the proportion of them reporting to the Chair of the Board of Directors, CEO, and/or COO changes in relation to the type of company: it increases significantly (**) for non-profit organizations or associations (52.6%) and is instead lower in joint stock companies (16.7%) and government-owned organizations or political institutions (15.2%). In NPOs, a proper CCO position might not exist, which could explain why such a high proportion of communication professionals report directly to the C-level.

3.4 Communication inter-functional collaboration still mostly limited to the CEO and Marketing department

As in the last two editions of the report, the current results confirm a high level of collaboration with the CEO and the Marketing department [21]. In fact, 74.4% of CCOs and 44.7% of professionals with a budget claim to work closely with the CEO. Likewise, 63.5% of CCOs and 50.6% of professionals with budget state that they work closely with the Marketing department. Also similar to the last editions of the report, it seems that CC/PR departments have a relatively low degree of collaboration with HR departments.

Similar differences between CCOs and professionals with budget exist when it comes to collaboration with other functions as well. These differences suggest that CCOs are the ones who drive the relationship with other functions.

Inter-functional collaboration (%)

	Com	Other	CEO		Marketing		HR		Finance		Legal		Board of Directors	
			CCO	PWB	CCO	PWB	CCO	PWB	CCO	PWB	CCO	PWB	CCO	PWB
1			1.4	5.9	5.4	7.1	10.8	22.4	14.9	17.6	23	22.4	20.3	31.8
2			1.4	17.6	4.1	10.6	16.2	22.4	17.6	25.9	24.3	18.8	17.6	32.9
3			23	31.8	27	31.8	40.5	40	35.1	38.8	27	38.8	35.1	25.9
4			59.5	37.6	18.9	29.4	24.3	11.8	25.7	15.3	21.6	16.5	20.3	8.2
5			14.9	7.1	44.6	21.2	8.1	3.5	6.8	2.4	4.1	3.5	6.8	1.2
			74.4	44.7	63.5	50.6	32.4	15.3	32.5	17.7	25.7	20	27.1	9.4

CCO: Chief Communication Officer; PWB: Professionals with budget

[21] Q18 (asked to 4 and 5): How closely do you work with the CEO/Marketing department (including brand and sales managers)/HR department/Finance department/Legal department/Board of Directors? Scale: a graphical representation of the scale was used for this question (see the table "Inter-functional Collaboration"). All levels of closeness were considered.

The degree of inter-departmental collaboration varies considerably across the different types of organizations. The patterns in the results, with some exceptions, confirm the findings of the last Observatory. For instance, non-profit organizations or associations seem to enjoy a higher level of collaboration with the CEO (89.5%) and the Marketing department (84.2%). Joint stock companies have a higher-than-average collaboration with the CEO (86.4%), the HR department (40.9%,**) and the Finance (50%,**) and Legal (31.8%,**) departments. Professionals in government-owned organizations or political institutions instead seem to collaborate less with other departments, with the exception of the Board of Directors (35.7%).

Inter-functional collaboration across types of organization (CCOs) (%)

	CEO	Marketing	HR	Finance	Legal	Board of Directors
Average	74.4	63.5	32.4	32.5	25.7	27.1
Joint stock companies	86.4	45.5	40.9	50	31.8	27.3
Private companies	56.3	68.8	25	12.5	18.8	18.8
Government-owned organizations or political institutions	50	57.1	21.4	21.4	21.4	35.7
Non-profit organizations or associations	89.5	84.2	26.4	26.4	26.4	21.1

3.5 Corporate communication and public relations control most of the communication disciplines, with the exception of public affairs and investor relations

Communication disciplines, in 66% of the cases, are all under the CC/PR department [22]. The communication disciplines that most often fall outside CC/PR departments are public affairs and investor relations, followed by internal communication and marketing communication.

Across different types of organizations, the proportion of cases in which all communication disciplines are under the CC/PR is lower in joint stock companies (54.2%,*) and higher instead in private companies (87.5%,*).

The proportion of communication disciplines under the CC/PR department is higher in cases in which the CCO is sitting on the executive board (85.7%,*) [23]; the proportion is also higher when the CCOs are members of the extended executive board (76.5,*). This result was not found in 2011.

The percentage of CC/PR with all communication disciplines under their control does not seem to be related to the CCO's proximity to the CEO [24].

[22] Q16 (asked to 4): In your organization, are all the communication disciplines (e.g., internal communication, investor relations, public affairs) under the corporate communication/PR function? Response Items: Yes, No. Respondents who answered "No" were then asked: If no, which one(s) is (are) not under the corporate communication/PR function?

[23] See data Q15, Chapter 3.2: (asked to 4): What is your hierarchical status? Response Items: I'm a member of the executive board; I'm a member of the extended executive board; None of the above, but I report directly to the CEO; I report to another executive board member. To whom? (open answer); None of the above. I report to (open answer). Adapted from ECM 2011 (Q15).

[24] See data Q18, Chapter 3.4: (asked to 4 and 5): How closely do you work with the CEO/Marketing department (including brand and sales managers)/HR department/Finance department/Legal department/Board of Directors? Scale: a graphical representation of the scale was used for this question (see the table "Inter-functional Collaboration"). All levels of closeness were considered.

3.6 Independence between corporate communication and marketing matters



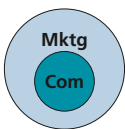
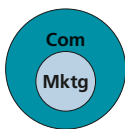

The relationship between the corporate communication/PR function and the marketing function can follow five different organizational models. The two functions can be completely independent or independent but coordinated, marketing can lead corporate communication, corporate communication can lead marketing, or the two functions can be merged in one undifferentiated department.

As in the previous two editions of the Swiss Observatory, the dominant model (see the following table, Model 2) is the one in which communication and marketing are two independent, yet coordinated functions (39%) [25]. However, compared to 2011, Model 2 has become less dominant (45% in 2011). In addition, marketing-driven configurations (see Model 3) decreased from 12.2% in 2011 to 4.4% in 2013. Furthermore, the proportion of organizations with a communication-driven model grew from 14.4% in 2011 to 25.8% this year. This increase can be explained with the higher proportion in the sample of government-owned organizations or political institutions and non-profit organizations and associations. In 2011, these two types of organizations seemed to privilege the coordinated but independent configuration (Model 2); this year, they moved more toward communication-driven models (Model 4), thereby influencing the overall average.

Some other differences emerge when looking at the different types of organizations (**). For instance, Model 2 is more dominant in joint stock companies (58.3%) and only somewhat present in government-owned organizations or political institutions (22.5%) and non-profit organizations or associations (18.2%). Government-owned organizations or political institutions and non-profit organizations or associations seem to privilege instead a communication-driven model (see Model 4).

[25] Q14 (asked to 4 and 5): Which of the following diagrams most clearly corresponds to the circumstances of your company? (pick 1). For the possible response options, see the diagram "Marketing and Communication Interrelation."

Marketing and communication interrelation (%)

Organizational model	1	2	3	4	5	6
						Does not apply
Average	10.7	39	4.4	25.8	12.6	7.5
Joint stock companies	18.8	58.3	6.3	2.1	8.3	6.3
Private companies	0	41.7	0	29.2	25.0	4.2
Government-owned organizations or political institutions	15	22.5	5.0	35.0	7.5	15.0
Non-profit organizations or associations	2.6	28.2	5.1	43.6	17.9	2.6

Model 2 is present in a higher proportion in the Banking, Insurance and Finance sector (71.4%) and in the Telecommunications and Media sector (66.7%).

It is interesting to note how the organizational configuration between communication and marketing is related to the proportion of time that professionals spend on marketing versus communication topics as well as the degree to which all communication disciplines are under the CC/PR department.

First, the organizational relationship between communication and marketing is related to the ratio of marketing and corporate topics covered by the Corporate Communication Department [26]. On average, 66.3% of CC/PR communication activity relates to corporate topics and 33.7% of such activity relates to covering marketing topics. However, when communication leads marketing (Model 4), 71% of the communication activity is devoted to corporate topics. On the other hand, when marketing leads communication (Model 3), the proportion of corporate topics drops to 48.6%. The same is true for the equivalent question regarding the social media activity related to corporate marketing topics, as reported in Chapter 5, Section 3.

Second, the organizational relationship between communication and marketing is related to the proportion of cases in which all communication disciplines are organized under the CC/PR department [27]. On average, in 66% of the cases, all communication disciplines are under the CC/PR department. In companies where communication leads marketing (Model 4), the proportion is much higher (78%), whereas when marketing leads communication (Model 3), the proportion falls to 42.9%.

[26] Q2 (asked to all): (Organization) How much of your communication activity goes into covering corporate-related and marketing-related topics? (Agency) In your consulting practice, how much of your communication activity goes into covering corporate-related and marketing-related topics for your clients? (Divide 100 % points among the two topics.) Response items: Corporate-related topics, Marketing-related topics.

[27] See data Q16, Chapter 3.5: (asked to 4): In your organization, are all the communication disciplines (e.g., internal communication, investor relations, public affairs) under the corporate communication/PR function? Response Items: Yes, No. Respondents who answered "No" were then asked: If no, which one(s) is (are) not under the corporate communication/PR function?

3.7 Increased competition across departments for the responsibility of corporate communication and public relations

The data indicate that 43.2% of communication professionals believe that, in the last three years, competition has increased across departments for the responsibility of corporate communication/public relations areas [28]. Some differences of perceptions can be reported between respondents.

More individuals from government-owned organizations or political institutions believe that there has been an increase in competition across departments (57.5%). An above-average increase in competition across departments is also indicated in the Bank, Insurance and Finance sector (57.1%) and in the Telecommunications and Media sector (50%).

The increase in competition is also perceived more by those professionals working at the divisional/unit level (54.8%) rather than at the corporate level (43.8%). When it comes to the different professional profiles, agency CEOs and organizations' CCOs have a much lower perception of this issue (34.6% and 36.5%,**) than professionals with budget in agencies and organizations (47.4% and 54.1%,**). Professionals with budget working at the divisional/unit level seem to be those most likely to perceive an increase in competition (60%).

When looking at the perceived growth in competition across departments in relation to the hierarchical position of the CCO [29], some further differences arise. It seems that the higher the hierarchical status of the CCO, the higher the perceived increase in the competition across departments (**). CCOs who are members of the executive board perceive more such competition (42.9%), followed by CCOs who are part of the extended executive board (29.4%) and who are reporting directly to the CEO (25%).

The perceived level of competition across departments also varies according to the organizational configuration of the communication and marketing functions [30]. The perceived competition is lower in organizations adopting a communication-driven model (39%, see Model 4 on page 24) and in organizations in which communication and marketing are the same entity (35%, see Model 5 above); on the other hand, the perceived growth in competition across departments is higher in organizations with a marketing-driven approach (71.4%).

[28] Q19 (asked to 1, 2, 4, and 5): (Company) Do you have the impression that in the last three years, there has been an increase in the competition across departments for the responsibility of corporate communication/public relations areas? (Agency) Thinking about the companies you work with, do you have the impression that in the last three years, there has been an increase in the competition across departments for the responsibility of corporate communication/public relations areas? Response options: Yes; No.

[29] See data Q15, Chapter 3.2: (asked to 4): What is your hierarchical status? Response Items: I'm a member of the executive board; I'm a member of the extended executive board; None of the above, but I report directly to the CEO; I report to another executive board member. To whom? (open answer); None of the above. I report to (open answer). Adapted from ECM 2011 (Q15).

[30] See data Q14, Chapter 3.6: Q14 (asked to 4 and 5): Which of the following diagrams most clearly corresponds to the circumstances of your company? (pick 1). For the possible response options see the diagram "Marketing and Communication Interrelation."

3.8 A tendency toward the centralization of the CC/PR function

When it comes to the perceived tendency toward (de)centralization of the corporate communication/public relations function, 76.9% of the respondents think that there has been a tendency toward centralization [31]. This tendency is felt slightly more in organizations than in agencies (80.5% vs. 72.6%). Across types of organizations, it is mostly experienced in non-profit associations or organizations (84%) and slightly less in joint stock companies (75%). Looking at the different sectors, 100% of the respondents working in firms in the Chemical, Pharmaceutical and Health, and in the Professional Business Services sectors perceive the tendency toward centralization.

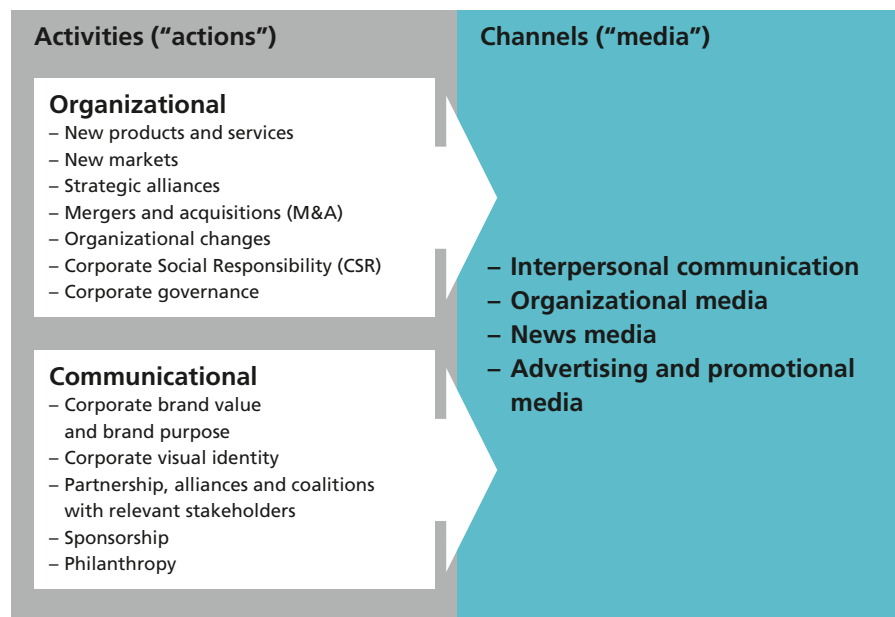
[31] Q20 (asked to 1, 2, 4, and 5): (Company): Do you have the impression that in the last 3 years there has been a tendency toward centralization or de-centralization of the corporate communication/public relations function? (Agency): Thinking about the companies you work with, do you have the impression that in the last 3 years there has been a tendency toward centralization or de-centralization of the corporate communication/public relations function? Response options: Centralization; Decentralization.

4. The practice of corporate communication

Disciplines

- Institutional communication
- Issues communication
- Internal communication
- Financial comm. & investor relations

- Public affairs
- Community relations
- Crisis communication



Conceptual note: Corporate communication and public relations include several disciplines that span from institutional communication to crisis communication. Communication professionals enact the different disciplines by implementing organizational actions that can go from contributing to the design of new products or services to influencing corporate governance. Of course, they can also act by implementing communicational activities (for instance by defining corporate brand values and brand purposes or by managing philanthropic activities). Their actions are formally communicated through four main categories of channels: interpersonal, organizational media, news media, and advertising and promotional channels. The following sections will present data referring to this conceptual framework.

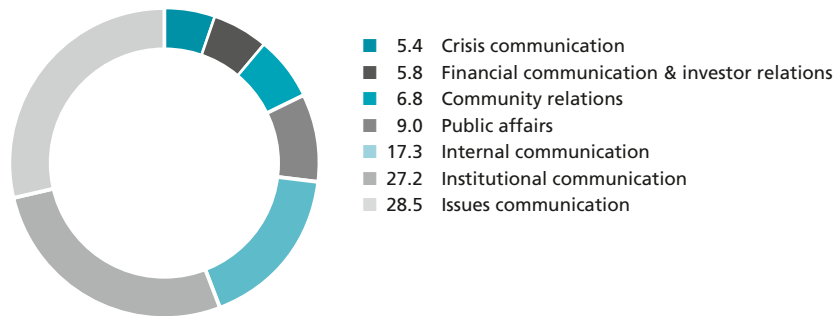
4.1 Communication disciplines: A strong focus on external communication

In line with the results from the 2010 and 2011 Swiss Practice Monitors, “issues communication” (28.5%) and “institutional communication” (27.2%) are the communication disciplines that professionals spend most time managing or consulting on [32]. Also in line with the results obtained in these previous years, “crisis communication” (5.4%) and “financial communication and investor relations” (5.8%) are the two disciplines on which professionals spend less time (the order was inverted, but the difference between the two is very small).

Although “institutional communication” might also be partially addressed internally, the weak weight of internal communication (17.3%) to a certain extent clashes with the fact that communication professionals claim to be highly involved in organizational changes (see Section 4.2.). However, the external focus might be related to the pressure of external information flows and faster issues escalation (see Section 2.1 on trends).

[32] Q3 (asked to all): (Organization) The corporate communication/public relations function includes several disciplines. What percentage of your time do you spend managing them? (Agency) The corporate communication/public relations function includes several disciplines. What percentage of your time do you spend consulting on them? (Please divide 100 % points among the seven disciplines). For possible responses, see the “Communication disciplines” chart. NOTE: The question was asked in a different way compared to the two previous editions of the report.

Communication disciplines (%)



Organizations and agencies spend a relatively similar amount of time on the various disciplines, except “internal communication”, which is a discipline on which agencies spend significantly more time compared to organizations (21.4% vs. 11.6%, ***).

In addition, when looking at the different types of organizations, the proportion of time spent on the different disciplines remains relatively stable, with some exceptions. For instance, non-profit associations or organizations spend more time on “issues communication” (35.9%). Joint stock companies spend more time on “internal communication” (25.7%) and “financial communication and investor relations” (9.4%).

When looking at the different sectors, companies in the Chemical, Pharmaceutical, and Health sector spend more time on “institutional communication” (32.3%) and “internal communication” (37.7%), but much less on “issues communication” (10.5%). “Internal communication” is a discipline on which companies in the Telecommunications and Media (24.4%) and Bank, Insurance and Financial (21.8%) sectors also spend more time than the average.

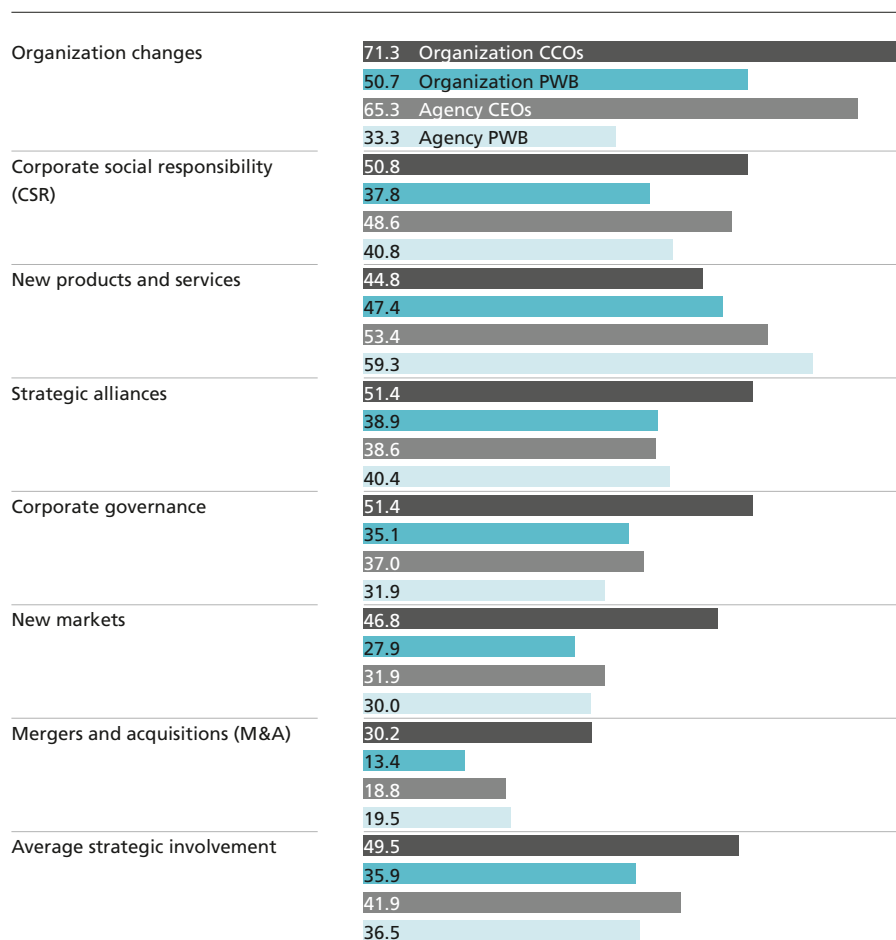
Finally, organizations with a marketing-driven communication function seem to spend more time on “issues communication” (41.4%) compared to organizations with other communication configurations.

4.2 Strong increase in the involvement of corporate communication in managing organizational changes

Like any other management function, corporate communication fulfills its strategic role when it influences business decisions. If it doesn't, it is confined to a tactical part, limiting itself – in the best case scenario – to supporting strategic objectives defined by other managers.

In line with the results from the last years, 49.5% of CCOs feel they are highly involved in business decisions [33], remaining the professional group with the highest perceived involvement in business decisions. The relative difference with the involvement of agencies' CEOs is relatively small (41.9%) and has decreased compared to 2011. The differences between professionals with budget in organizations and in agencies are very small (35.9% and 36.5%, respectively) as in 2011.

Involvement in business decisions (%)



CEO: Chief Executive Officer; CCO: Chief Communication Officer; PWB: Professionals with budget

[33] Q1 (asked to 1, 2, 4, and 5): (Organization) How much do you feel involved in the decisions concerning the following business aspects? (Agency) In your consulting activity, how much do you feel your clients involve you in decision making concerning the following business aspects? (1 = not at all; 5 = very much; does not apply.) Scale points considered 4–5. For the possible response options, see the chart "Involvement in business aspects."

Some interesting differences arise when considering the changes that have taken place since 2011. For instance, CCOs feel they are strongly involved in “organizational changes” (71.3%), more so than in any other domain. This was not the case in 2011; in fact, the level of CCOs’ perceived involvement in organizational changes was much lower (47.7%). In addition, agencies’ CEOs have a much higher perceived level of involvement from their clients in “organizational changes” (65.3%) compared to 2011 (45.4%). In terms of “new products and services,” the perceived level of involvement of CCOs and agencies’ CEOs has grown considerably: CCOs changed from 35% in 2011 to 44.8% in 2013 and CEOs changed from 39.5% in 2011 to 53.4% in 2013.

Compared to 2011, CCOs’ perceived level of involvement in “new markets” has grown considerably (46.8% vs. 35.1% in 2011), yet their level of perceived involvement in “corporate social responsibility” has declined considerably from 79.3% to 50.8% this year.

In order to better understand the relationships between the perceived strategic involvement in business aspects and other variables, a single synthetic indicator of strategic involvement was computed by averaging the answers of each respondent on all items [34]. The average level of strategic involvement is 3.3 (minimum: 0; maximum: 6; st. dev.: 1.258).

The average level of strategic involvement seems to be related to two factors: the age and professional experience of the respondents and the hierarchical status of the CCOs [35]. First, the degree of perceived strategic involvement grows linearly, with some exceptions, with the age and years of experience of the respondent. On the other hand, the average level of strategic involvement does not change in any significant way on the basis of other individual variables, such as gender, education qualification, and/or communication qualification.

Second, looking at CCOs, their average level of perceived strategic involvement changes based on whether they sit, rather than not, on the executive board [36]: The average level for those CCOs who sit on the executive board is 4.37, and the average level for those who sit on the extended executive board is 3.82. Such a level of involvement falls further for those CCOs who are not members of the executive board, but do report to the CEO (3.01).

[34] Compared to using the single items, this indicator has more flexibility; in fact, it allows for easy comparisons and makes crossing it with other data much easier. Moreover, it also makes the understanding of results more intuitive than mentioning the single items each time.

[35] The level of strategic involvement, consistent with the last edition of the Observatory, does not change in any significant way across types of organization or sector or based on the geographical reach of the organization’s activity. In addition, structural factors such as the type of relationship between communication and the marketing function, or whether all disciplines are under the CC/PR function have no significant effect on the average level of strategic involvement, partially contradicting 2011 results.

[36] See data Q15, Chapter 3.2: Q15 (asked to 4): What is your hierarchical status? Response Items: I’m a member of the executive board; I’m a member of the extended executive board; None of the above, but I report directly to the CEO; I report to another executive board member. To whom? (open answer); None of the above. I report to (open answer). Adapted from ECM 2011 (Q15).

Furthermore, the level of perceived strategic involvement of CCOs varies according to the degree to which CCOs feel they are close to the CEO [37]: Considering the three closest options, the degree of involvement changes from 2.97 to 3.83 and reaches 4.04 for the closest possibility. Therefore, CCOs with a higher strategic involvement are those who sit on the executive board and work closely with the CEO.

Finally, the average level of strategic involvement is also associated with how seriously CCOs believe that their recommendations are taken by top management, reaching an average of 4.05 for those who believe CC/PR recommendations are taken very seriously [38].

4.3 Corporate branding is led by CCOs in two thirds of the time

Corporate branding is a process of soul searching, leading to the identification and formulation of the reason for being in an organization as well as its guiding values. As such, it can be considered the most strategic communication activity and one of the bridges between communication and corporate strategy.

Corporate branding in organizations: CCOs' responsibility, especially if the CCO is a member of the Board of Directors

Confirming the results of the last edition of the Observatory, it is apparent that CCOs play in two thirds of the cases a leading role in the development of their organizations' corporate brand (62.5%), while an even higher proportion play a leading role in the development of the corporate visual identity system (69.4%) [39]. In addition, in line with past results, as one descends the corporate ladder, the proportion of professionals with a leading role declines strongly, as shown in the following table.

Organizations' communication professionals' leading role in corporate branding activities (%)

	Org. CCOs	Org. PWB	Org. PWoB
Definition of corporate brand values and brand purpose	62.5	19.8	8.5
Development of the corporate visual identity systems	69.4	32.1	10.0

CCO: Chief Communication Officer; PWB: Professionals with budget; PWoB: Professionals without budget

[37] See data Q18, Chapter 3.4: Q18 (asked to 4 and 5): How closely do you work with the CEO/Marketing department (including brand and sales managers)/HR department/Finance department/Legal department/Board of Directors? Scale: a graphical representation of the scale was used for this question (see the table "Inter-functional Collaboration"). All levels of closeness were considered.

[38] See data Q21, Chapter 2.2: Q21 (asked to 4, 5, and 6): In your organization, how seriously are corporate communication/PR recommendations taken by senior management (chairperson/CEO/executive board members)? (1 = not taken seriously at all; 5 = taken very seriously; I don't know.) Scale points considered 4-5 (average of the two). Adapted from GAP VI (2009)(Q7) and ECM 2011 (Q6).

[39] Q4 (asked to all): (Organization) To which extent are you involved in the following corporate brand activities? (Agency) In your consulting activity, to which extent are you involved in helping your clients with the following corporate brand activities? Response Items: Definition of corporate brand values and brand purpose (an organization's "fundamental reason for being"), Development of the corporate visual identity systems (logos, colors, typographies, images, etc.). Scale points for Companies: Not involved, Supporting role, Leading role, Does not apply.

The proportion of CCOs in charge of corporate brand activities becomes even higher when they are members of the executive board, rising to 75% for the development of the corporate brand values and purpose and to 84.2% for the development of the corporate visual identity system. The proportion of CCOs with a leading role in the definition of their organizations' brand values and purpose also grows together with their proximity to the Marketing department, reaching a maximum of 81.8% (***) in the case of the definition of brand values and purpose and 87.9% (***) in the case of the development of the corporate visual identity system.

When CCOs are not in charge of the corporate branding activities [40], the departments or functions most often in charge of the definition of corporate brand values and brand purpose are the CEO (40.7%), the Marketing department (37%), and the Board of Directors (11%). Instead, the departments or functions most often in charge of the development of the corporate visual identity systems when CCOs are not in charge are the Marketing department (63.6%) and less often the CEO (9.1%) or Board of Directors (4.5%).

Agencies and corporate branding: One third of agencies' CEOs play a leading role in corporate branding activities

Agencies less often play a leading role when it comes to helping their clients develop their corporate brands; however, compared to the 2011 results, they seem to play a leading role much more often. Indeed, 33.8% of agencies' CEOs play a leading role in the definition of the corporate brand values and purpose (8.8% in 2011) and the same exact proportion plays a leading role in the development of corporate brand visual identity systems (18.7% in 2011). As with organizations, as one descends the agency's hierarchical ladder, the degree of involvement decreases further, as shown in the following table.

Agencies' communication professionals with a leading role in corporate branding activities (%)

	Agency CEOs	Agency's PWB	Agency's PWoB
Definition of corporate brand values and brand purpose	33.8	16.7	6.3
Development of the corporate visual identity systems	33.8	21.8	6.7

CEO: Chief Executive Officer; PWB: Professionals with budget; PWoB: Professionals without budget

[40] Q4b (asked to 4): You have selected that you do not have a leading role in the "definition of corporate brand values and brand purpose"/"development of the corporate visual identity system". Which department/function is in charge of this task? (chose one). Response options: Marketing, Human Resources, Finance, Legal, CEO, Board of Directors, Other.

4.4 A welcomed increase in the leadership of communication professionals in stakeholders' management, sponsorship, and philanthropy

In addition to those just discussed, communicational activities comprise three other activities: partnerships, alliances, and coalitions with relevant stakeholders; sponsorship activities; and philanthropy activities.

As shown in the following table, there has been an increase from 2011 to 2013 in the proportion of CCOs with a leading role in managing all activities related to stakeholders' management, sponsorship, and philanthropy. Despite such an increase, the proportion still remains relatively low.

Traditionally, these activities have always been in the hands of the CEO and the Board of Directors. In fact, when CCOs do not play a leading role in the management of these communication activities, it seems that they are managed mostly by organizations' CEOs [41]. For instance, in 67.4% of the cases, CEOs are the ones managing partnerships, alliances, and coalitions with relevant stakeholders. In addition, in 26.3% of cases, CEOs play a leading role in managing philanthropy activities, followed by the Board of Directors (15.8%) [42]. However, one would expect modern communication departments to take full leadership in managing such activities.

Looking at the differences between CCOs and agencies' CEOs, it appears that – contrary to the last edition of the Observatory – they have a similar level of involvement in the management of “partnerships, alliances, and coalitions with relevant stakeholders” (36.1% and 36.8%). On the other hand, as in the 2011 Observatory, the level of involvement in other communication activities differs significantly among CCOs and agency CEOs. CCOs have a much higher level of involvement in “sponsorship” activities compared to agency CEOs (56.3% vs. 16.4%, ***). CCOs also more often play a leading role in managing “philanthropy” activities compared to agency CEOs (45.3% vs. 4.6%, ***) [43].

[41] Q5b (asked to 4): You have selected that you do not have a leading role in “Partnership, alliances and coalitions with relevant stakeholders”/“Sponsorship”/“Philanthropy.” Which department/function is in charge of this task? (choose one). Response options: Marketing, Human Resources, Finance, Legal, CEO, Board of Directors, Other.

[42] Valid data regarding sponsorship activities were not available.

[43] Q5 (asked to all): (Organization) To which extent are you involved in helping your clients with the following activities? (Agency) In your consulting activity, to which extent are you involved in helping your clients with the following activities? Response items: “Partnerships, alliances and coalitions with relevant stakeholders”, “Sponsorship”, “Philanthropy”. Scale points: Not involved, Supporting role, Leading role (does not apply).

CCOs and agency CEOs with a leading role in communication activities (%)

	2011 Org. CCO	2013 Org. CCO	2011 Agency CEOs	2013 Agency CEOs
Partnerships, alliances and coalitions with relevant stakeholders	27.7	36.1	11.0	36.8
Sponsorship	48.2	56.3	8.8	16.4
Philanthropy	33.7	45.3	9.9	4.6

As shown in the next table, agencies' CEOs play mainly a supportive role in the management of the three communication activities. These data support the interpretation that organizations have developed fairly advanced competencies internally and are able to lead these processes themselves, asking agencies to support and complement their skills.

CCOs and agency CEOs with a supporting role in communication activities (%)

	CCOs	Agency CEOs
Partnerships, alliances, and coalitions with relevant stakeholders	58.3	50.0
Sponsorship	34.4	46.6
Philanthropy	35.8	9.9

4.5 Reputation management and social media in the CCOs' hands – CSR not

Other communication activities central to the role of the profession include reputation management, corporate social responsibility, and social media. These activities can also vary greatly in the degree of sophistication to which they are performed, the extent to which they are done in a more or less strategic way, and the degree to which communication is in charge of them.

The data indicate that CCOs are often in charge of such activities. For instance, 76.7% of organizations' CCOs claim to play a leading role in "reputation management" and 79.7% a leading role in managing "social media" [44]. Conversely, only 36.9% of organizations' CCOs claim to play a leading role in the management of "corporate social responsibility." On the agency side, 39.5% of agency CEOs claim to play a leading role in helping their clients in "social media" matters, 37.5% of them claim the same role in "reputation management," and 13.5% in "corporate social responsibility" [45].

[44] Q5 (asked to all): (Organization) To which extent are you involved in the following activities? (Agency) In your consulting activity, to which extent are you involved in helping your clients with the following activities? Response items: "Reputation management", "Corporate Social Responsibility", "Social media". Scale points: Not involved, Supporting role, Leading role, (does not apply).

[45] Q1 also enquired about the level of involvement of communication professionals in corporate social responsibility (i.e., 1 = not at all; 5 = very much; does not apply). However, in Q5 respondents were asked to indicate their level of leadership (i.e., Scale points: Not involved, Supporting role, Leading role, (does not apply)). It is therefore not surprising that the results obtained from Q5 are lower than those obtained from Q1.

CCOs and agency CEOs with a leading role in reputation management, CSR, and social media (%)

	CCOs	Agency CEOs
Reputation management	76.7	37.5
Corporate social responsibility	36.9	13.5
Social media	79.7	39.5

CCOs who are not in charge of such activities answered that “reputation management” is managed by CEOs (52.9%) or the Board of Directors (35.3%) [46]. “CSR” is also often managed directly by the CEO (36.6%) and/or the Board of Directors (14.6%) or other entities (34.1%) [47]. When it comes to “social media,” the Marketing department is instead most often in charge (57.1%).

4.6 Communication channels: Interpersonal communication up, advertising down

The relative importance of the different types of communication channels has remained similar since 2011; however, “interpersonal communication” seems to have gained some importance (+ 2.6 percentage points) and “advertising and promotional media” to have lost some (–3.5 percentage points) [48]. The most used channel remains “organizational media” (30.7%), followed by “news media” (27.2%), “interpersonal communication” (26.5%), and finally “advertising and promotional media” (15.6%).

Importance of communication channels (%)

Organizational media	30.5 2011	30.7 2013
News media	26.4	27.2
Interpersonal communication	23.9	26.5
Advertising and promotional media	19.1	15.6

Looking at the differences between organizations and agencies, it appears that organizations spend more time on “interpersonal communication” (28.1% vs. 24.5%), whereas agencies spend more time using “news media” (30.5% vs. 24.5%).

[46] Q5b (asked to 4): You have selected that you do not have a leading role in “Reputation management”/“Corporate Social Responsibility”/“Social media.” Which department/function is in charge of this task? (choose one). Response options: Marketing, Human Resources, Finance, Legal, CEO, Board of Directors, Other.

[47] These include separate CSR departments, public affairs, etc.

[48] Q6 (asked to all): (Organization) Corporate communication/public relations functions communicate through four channel categories. What is the relative importance of these channels in your organization today? (Agency) Corporate communication/public relations functions communicate through four channel categories. Regarding the work done for your clients, what is the relative importance of these channels today? Response items: Interpersonal communication, Organizational media, News media, Advertising and promotional media.

If one looks at the different types of organizations, it appears that “interpersonal communication” is favored by joint stock companies (29.4%), which also use more “organizational media” (33.7%). “Organizational media” are also used more by non-profit organizations or associations (33.9%). “News media” are instead highly used by government-owned organizations or political institutions.

Finally, it is interesting to note that organizations’ CCOs (30.5%) spend more time on “interpersonal communication” than professionals with budget (26%); likewise, in agencies, a similar difference exists between CEOs (27.4%, **) and professionals with budget (20.6%, **). Professionals in organizations who claim to work very close with the CEO [49] also spend even more time on “interpersonal communication” (36.8%).

[49] See data Q18, Chapter 3.4: Q18 (asked to 4 and 5): How closely do you work with the CEO/Marketing department (including brand and sales managers)/HR department/Finance department/Legal department/Board of Directors? Scale: a graphical representation of the scale was used for this question (see the table “Inter-functional Collaboration”). All levels of closeness were considered.

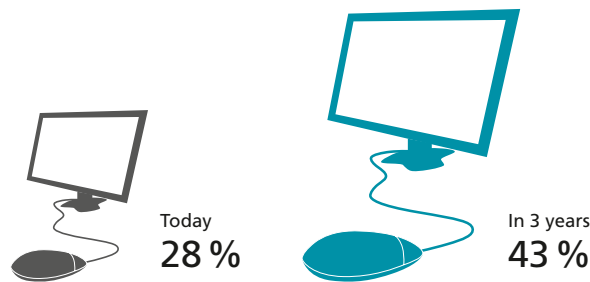
5. Digital communication

5.1 Companies' use of mobile applications expected to grow while social networks continue to decrease

Communication professionals claim to spend, on average, 28% of their time producing digital media [50]. This percentage is slightly higher than the same figure in 2011, which was 24%. The same can be said for the time professionals expect to spend in three years, which – according to this year's data – is 43%. Some differences can be observed across sectors: The time currently spent producing digital media is much higher among companies in the Telecommunications and Media sector (43%) and only slightly higher in the Bank, Insurance and Finance sector (34%). As in 2011, CCOs spend a lower average time producing digital media (23.7%) than professionals with (33.3%) and without budget (32.1%).

When looking at the different types of digital media, “social networks” are the most popular (49.2%), followed by “online videos” (30.9%) and “mobile applications” (27.8%) [51].

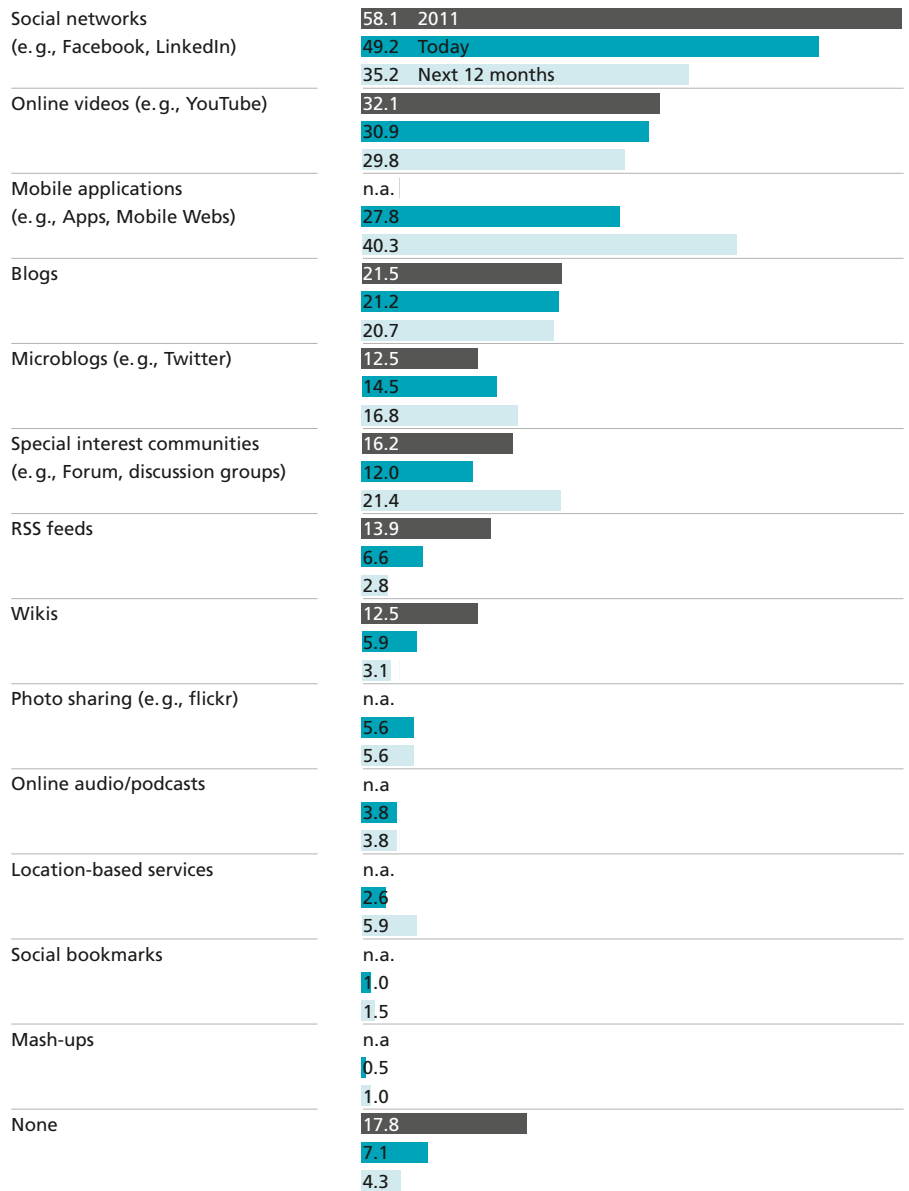
Interestingly, the use of “social networks” has decreased since 2011 (–8.9 percentage points) and is expected to decrease further in the next 12 months (–14 percentage points). The types of digital media expected to grow most are mobile applications (+12.5 percentage points) and special interest communities (+9.4 percentage points). The proportion of professionals not using any type of digital media has decreased from 17.8% in 2011 to 7.1% in 2013 and is expected to further decrease to 4.3% in 12 months.



[50] Q7 (asked to all): (Organization) Think about the relevance of digital communication (both: internal and external) in your activity. Please provide a rough estimate of the relative time you spend in producing this type of communication today (don't include the time spent in day-to-day e-mailing). How much do you think this will be in 3 years? (Agency) Think about the relevance of digital communication in your activity. Please provide a rough estimate of the relative time you spend today in producing this type of communication for your clients (don't include the time spent day-to-day e-mailing). How much do you think this will be in 3 years? (Percentage of time).

[51] Q8 (asked to all): (Organization) Apart from websites and e-mails, what are the main digital media used in your company today? (Pick up to 3) (Agency) Apart from websites and e-mails, what are the main digital media you develop for you clients today? (Pick up to 3) (Organization) Apart from websites and e-mails, what are the digital media that will grow the most in your company in the next 12 months? Please pick the ones with the most expected growth, regardless of their current relevance. (Pick up to 3) (Agency) Apart from websites and e-mails, what are the digital media you will develop for your clients that will grow the most in the next 12 months? Please pick the ones with the most expected growth, regardless of their current relevance. (Pick up to 3) Response items: see chart "Usage of digital media."

Usage of digital media (%)



Looking at the different types of organization, in line with the 2011 data, “social networks” are mostly used by non-profit organizations or associations (64.6%,**), whereas joint stock companies use them to a lesser extent (33.8%,**). Non-profit organizations and associations as well as government-owned organizations or political institutions use “mobile applications” to a greater extent if compared to the average (43.8% and 37.9%, respectively).

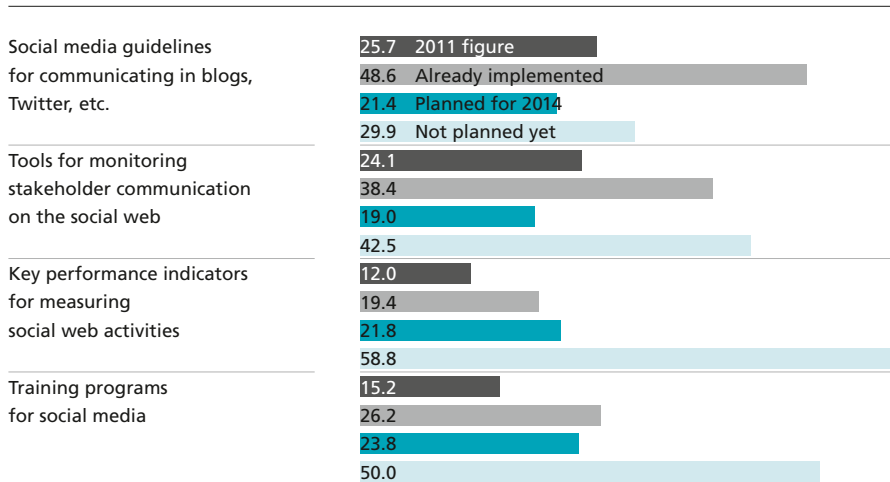
When looking at the different sectors, “social networks” are much less used in the Bank, Insurance and Finance sector (38.7%) and the Chemical, Pharmaceutical and Health sector (27.3%). These two sectors also use much fewer online videos (22.6% and 18.2%, respectively). The Bank, Insurance and Fi-

nance sector and the Professional Business Services sector seem to use “mobile applications” more (38.7% and 40%, respectively).

5.2 Social media governance continues to gain traction

The implementation of guidelines for the governance and proper use of social media has grown significantly since 2011 [52]. For instance, in 2011, only 25.7% had in place “social media guidelines”; today, almost half of the respondents claim to have such guidelines in place (48.6%) and 21.4% are planning to implement such guidelines in 2014. In addition, all other governance measures for social media have grown since 2011: 38.4% of respondents claim to have already implemented “tools for monitoring stakeholder communication”, 19.4% have “key performance indicators for measuring social web activities” and 26.2% have “training programs for social media.” In these last two categories, the growth since 2011 has been smaller.

Social media governance measures (%)



Across the various types of organizations, as in 2011, joint stock companies are the most advanced when it comes to the implementation of social media governance measures while non-profit organizations and associations have lower levels of implementation. Indeed, 66.7% of joint stock companies have already implemented “social media guidelines,” whereas only 30.8% of non-profit organizations have (**). Similarly, 56.3% of joint stock companies have implemented “tools for monitoring stakeholder communication,” whereas only 25.6% of non-profit organizations have (*). The same applies for “key performance indicators” (27.1% vs. 12.8%) and “training programs for social media” (33.3% vs. 23.1%).

[52] Q9 (asked to 1, 2, 4, and 5): (Organization) Has your organization already implemented one of the following social media governance measures? (Agency) According to your experience, on which stage is the majority of your clients in the implementation of the following social media governance measures? Social media guidelines for communicating in blogs, Twitter, etc.; Tools for monitoring stakeholder communication on the social web; Key performance indicators for measuring social web activities; Training programs for social media. Response options: Already implemented, Planned for 2014, Not planned yet. Adapted from ECM 2011 (Q15).

Implementation of social media governance measures across different organization types (%)

	Social media guidelines for communicating in blogs, Twitter, etc.	Tools for monitoring stakeholder communication on the social web	Key performance indicators for measuring social web activities	Training programs for social media
Joint stock companies	66.7	56.3	27.1	33.3
Private companies	45.8	50.0	20.8	25.0
Government-owned org. or Political Institutions	60.0	50.0	22.5	27.5
Non-profit organizations	30.8	25.6	12.8	23.1

5.3 Corporate communication social media not always focused on corporate topics

The data indicate that 62.7% of social media activity focuses on covering corporate topics while 37.3% is dedicated to marketing-related topics [53]. These proportions change with the models of corporate communication and marketing configuration. In organizations in which marketing controls communication [54], most social media activity covers marketing topics (72.9%); when communication controls marketing, social media activity mostly covers corporate topics (68.1%).

The percentage of social media activity dedicated to covering corporate topics is lower in joint stock companies (51.8%) and slightly higher in non-profit organizations or associations (65.6%) and government-owned organizations or political institutions. When looking at the different sectors, the proportion of social media activity dedicated to corporate topics is higher in the Chemical, Pharmaceutical and Health sector (73.3%), and Professional Business Service sector (76.7%), but lower in the Bank, Insurance and Finance sector (53.1%) and the Telecommunications and media sector (44.2%).

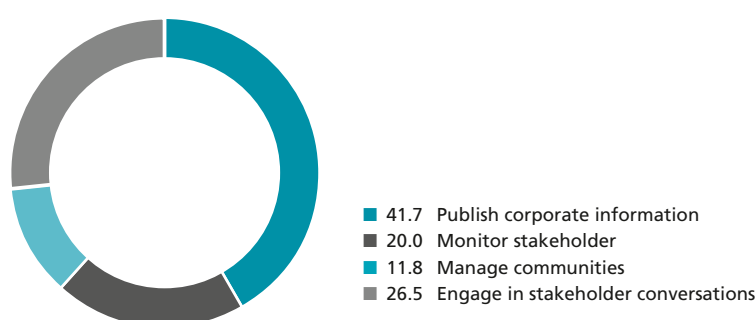
[53] Q10 (asked to 1, 2, 4, and 5): (Corporate) How much of your social media activity goes into covering corporate-related and marketing-related topics? (Agency) How much of your consulting activity on social media goes into covering corporate-related and marketing-related topics? (Please divide 100 % points among the two topics). Corporate topics; Marketing topics.

[54] See data Q14 (asked to 4 and 5): Which of the following diagrams most clearly corresponds to the circumstances of your company? (pick 1). For the possible response options see the diagram "Marketing and Communication Interrelation."

5.4 Use of social media for corporate-related activities

Respondents were then asked to specify the type of corporate-related activity for which their company uses social media [55]. Most such activity is devoted to publishing corporate information (41.7 %) and to engaging in stakeholder conversations (26.5 %).

Use of social media for corporate-related activities (%)



When looking at the different types of organizations, there are some differences regarding the use of social media for corporate-related activities. For instance, government-owned organizations or political institutions use social media to publish corporate information 58.8% of the time, whereas joint stock companies only 37.8%. Government-owned organizations and non-profit associations use social media for the monitoring of stakeholders less often than average (13.5% and 15.1%, respectively). The use of social media to engage in stakeholder conversations are more important for joint stock (30.4%) and non-profit organizations or associations (34.2%).

Use of social media for corporate-related activities, across different organization types (%)

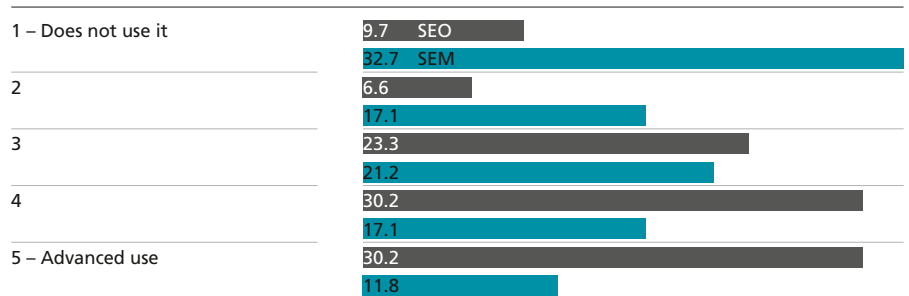
	Publish corporate information	Monitor stakeholder	Manage communities	Engage in stakeholder conversations
Joint stock companies	37.8	23.8	8.0	30.4
Private companies	52.9	18.1	11.7	17.3
Government-owned org. or Political Institutions	58.8	13.5	8.4	19.4
Non-profit organizations	40.3	15.1	10.4	34.2

[55] Q11 (asked to asked to 1, 2, 4, and 5). (Corporate) What are the main corporate-related activities for which your company uses social media? (Agency) What are the main corporate-related activities for which your clients ask you for help with social media? (please divide 100 % points among the four activities). Response options: Publish corporate information, Monitor stakeholders, Manage communities, Engage in stakeholder conversations.

5.5 Search engine optimization widely used by corporate communication

As shown in the following chart, respondents answered that their companies widely use Search Engine Optimization (SEO) to manage corporate visibility online. In fact, 30.2% of respondents indicated that their companies make advanced use of SEO in order to manage their visibility online (only 9.7% claimed that their company does not use it all [56]).

SEO and SEM use (%)



Conversely, professionals claim that their companies use Search Engine Marketing (SEM) much less. Only 11.8% claimed that their company makes advanced use of SEM to promote corporate visibility online (32.7% claimed that their company does not use it all).

Joint stock companies and private companies make advanced use of SEO more than the average (50% and 55%, respectively,**), whereas the proportion of respondents claiming that their companies use SEO at an advanced level is lower in non-profit organizations or associations (16.7%,**).

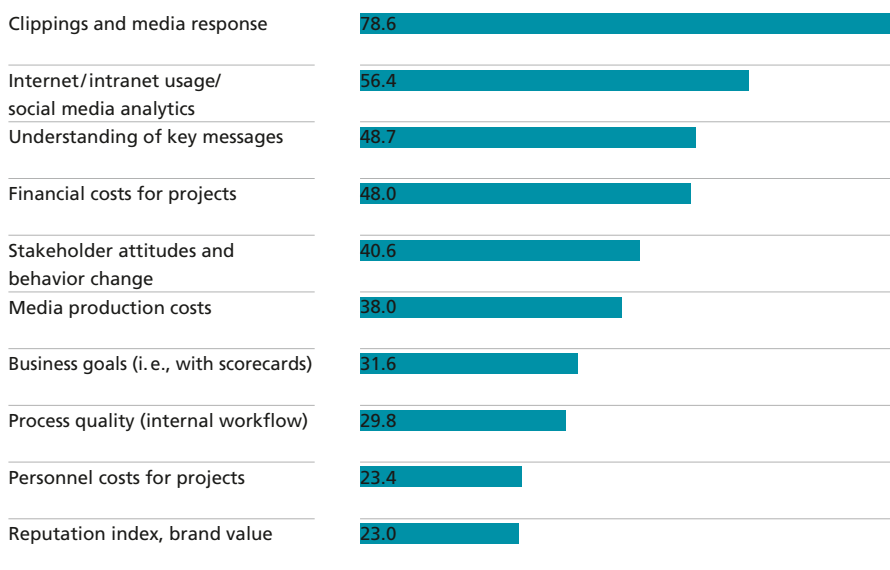
Private companies, compared to the average, make advanced use of SEM to a greater extent (25%,*), whereas, non-profit organizations or associations almost never make advanced use of SEM (2.8%).

[56] Q12 (asked to 1, 2, 4 and 5). (Company) To what extent does your company use the following techniques to manage its visibility online? (Agency) In your experience, to what extent do your clients use the following techniques to manage their visibility online? Response options: Search Engine Optimization (organic search results)/Search Engine Marketing (paid search results) (1 = "does not use it"; 5 = "advanced use", + "I don't know"). Scale points considered 4–5.

6. Measurement of communication effectiveness

As in the past two editions of the Observatory, the current results indicate that the majority of communication professionals (78.6%) measure the effectiveness of communication through “clippings and media-response” [57]. Also consistent with the past two editions, the second and third most mentioned items are “internet/intranet/social media analytics” (56.4%) and the “understanding of key messages” (48.7%).

Measurement of communication effectiveness (%)

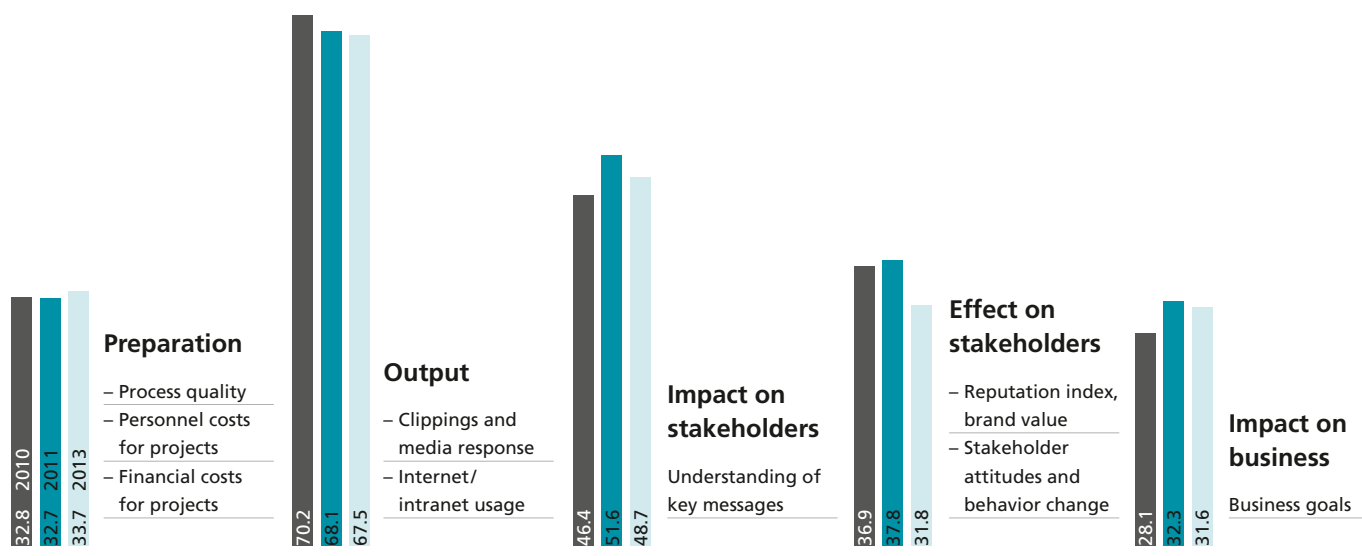


All the items can be grouped into five stages (levels) of evaluation that reflect the path from the preparation stage until the measurement of the actual impact of communication on business goals: “preparation,” “output,” “impact on stakeholders,” “effect on stakeholders,” and “impact on business.” Comparing the results with those from the last two editions of the Observatory, the current results generally confirm that most companies continue to use output measures of effectiveness (67.5% in 2013). It is worth stressing that the measurement of the “effect on stakeholders” significantly decreased compared to 2010 and 2011 (36.9% in 2010, 37.8% in 2011, and 31.8% in 2013).

Looking separately at the results for agencies and organizations, it appears that organizations give more importance than agencies to the “impact on business goals” (37.3% vs. 24%,*). This higher proportion of organizations stressing the “impact on business goals” is driven by joint stock companies (43.7%), private companies (37.1%), and – somewhat surprisingly – government-owned organizations or political institutions (39.7%).

[57] Q23 (asked to all): Which items do you monitor or measure to assess the effectiveness of public relations/communication management? (1 = not at all; 5 = very much). Scale points considered: 4–5. For the possible response options, see the chart “Measurement of communication effectiveness.” Taken from ECM 2009 (Q9).

Stages of evaluation (%)



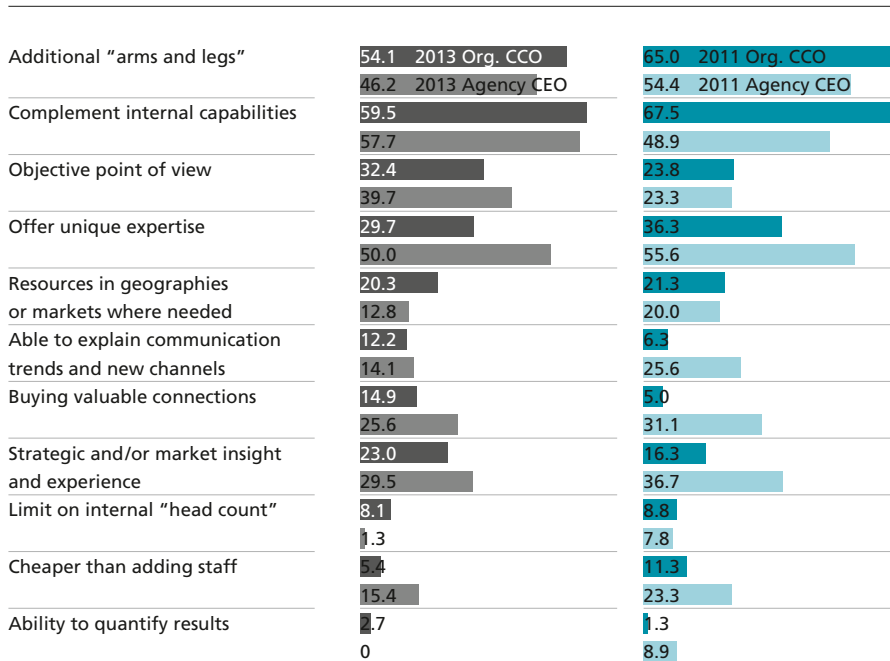
7. Agency–organization relationship

7.1 Working with communication firms: Operational reasons still prevail, although strategic ones gain in importance

As in previous years, organizations still claim that they seek communication firms' services for "operational reasons" (i.e., "additional arms and legs," "complementing internal capabilities") rather than for "strategic reasons" (i.e., "offer unique expertise," "strategic and/or market insight and experience," "buying valuable connections", and "able to explain communication trend and new channels") [58]. However, this year's results show that the relevance of "operational reasons" has decreased (–14.3 percentage points) [59], while "strategic reasons" have gained in importance (+19.9 percentage points) [60].

It is interesting to note that, because of this change [61], the gap between what organizations claim to be the reason they work with agencies and agencies' perceived reasons why organizations work with them also narrowed between 2011 and 2013.

Reasons for working with agencies and consultants (%)



[58] Q24 (asked to 1, 2, 4, and 5): (Organization) What are your main reasons for working with public relations agencies and communication consultants? (Agency) Why do you think companies decide to work with public relations agencies and communication consultants? (Pick 3) For the list of answer options (reasons), see the diagram "Reasons for working with agencies and consultants." Same scale as GAP VI (2009) and ECM 2008.

[59] Operational reasons include: "additional arms and legs", and "complement internal capabilities". Relative percentage difference for CCOs regarding "operational reasons" from 2011 to 2013 was obtained using the following procedure: First, we summed the proportion of organizations' CCOs who mentioned the two reasons for both 2011 and 2013 (2011: "additional arms and legs" [65] + "complement internal capabilities": [67.5] = 132.5; 2013: "additional arms and legs": [54.1] + "complement internal capabilities": [59.5] = 113.6). Second, the percentage difference was computed using the following calculation: $100 - ((113.6 \times 100) / 132.5) = 14.3$.

[60] Relative percentage difference for agencies' CCOs regarding "strategic reasons" from 2011 to 2013 was obtained using a procedure similar to the one mentioned in the previous footnote.

[61] This change is also related to the fact that agencies' CEOs are more conservative (–20%) in their claim about "strategic reasons", explaining why organizations work with them. Relative percentage difference for agencies' CEOs regarding "strategic reasons" from 2011 to 2013 was obtained using a procedure similar to the one mentioned in the previous footnote.

The gap between organizations' and agencies' perceptions in relation to "operational reasons" has almost closed, decreasing from 22.4% in 2011 to 8.5% in 2013 [62]. This gap has also decreased for the items falling under "strategic reasons": The gap between organizations' and agencies' perceptions has decreased from 57.1% in 2011 to 33.1% in 2013 [63].

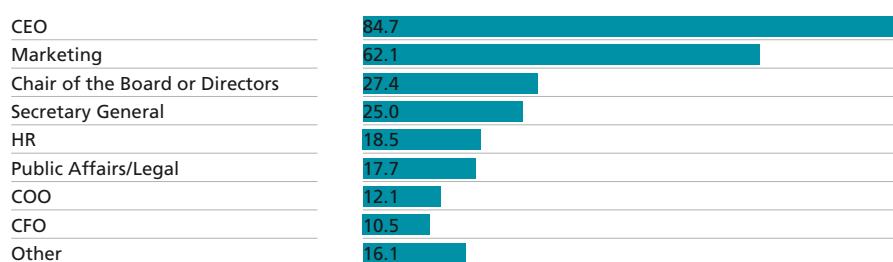
Across the different types of organizations, private companies mention most often "additional arms and legs" as a reason to work with agencies (75%), followed by joint stock companies (59.1%). Non-profit organizations mention this reason less often (36.8%).

Non-profit organizations very often mention that agencies are able to offer unique expertise (52.6%,*), a reason that is less often mentioned by joint stock companies (13.6%,*) and government-owned organizations or political institutions (21.4%,*). Joint stock and private companies most often mention that agencies provide them with "resources in geographies and/or markets where needed" (27.3% vs. 31.3%).

7.2 CEOs are the main clients of communication firms after the CC/PR departments

In line with the results obtained in the last Observatory, approximately half of the assignments that agencies and consultants receive come from CC/PR departments (2011: 50.0%; 2013: 51.5%) [64]. Commissions outside CC/PR departments most often come from CEOs (84.7%) and Marketing departments (62.1%).

Agency assignments that do not come from CC/PR (%)



[62] Gaps between organizations' and agencies' perceptions in relation to "operational reasons" were obtained as follows: For 2013, first we summed the proportion of organizations' CCOs and agencies' CEOs mentioning the two reasons (i.e., CCOs: "additional arms and legs" [54.1] + "complement internal capabilities" [59.5] = 113.6; CEOs: "additional arms and legs": [46.2] + "complement internal capabilities" [57.7] = 103.9). Second, the percentage difference was computed using the following calculation: $100 - ((103.9 * 100) / 113.6) = 8.54$. The same applies to 2011 (22.04%).

[63] Strategic reasons include: "offer unique expertise", "strategic and/or market insight and experience", "buying valuable connections", and "able to explain communication trend and new channels". Gaps between organizations' and agencies' perception in relation to "strategic reasons" were obtained using a procedure similar to the one mentioned in the previous footnote.

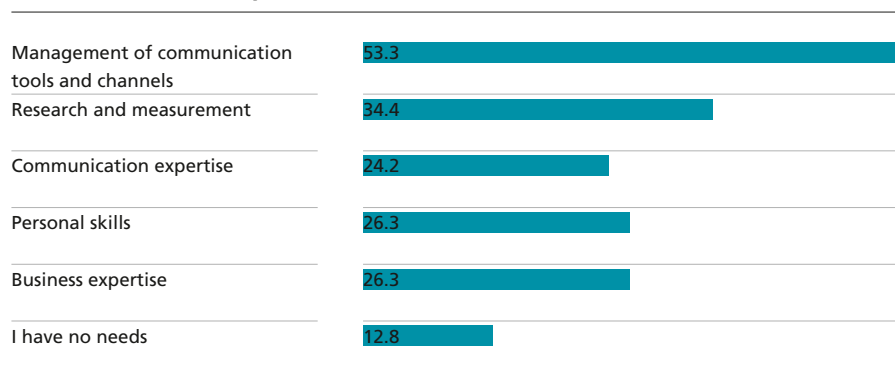
[64] Q25 (asked to 1 and 2): What percentage of your consulting assignments come from the corporate communication/PR department? Respondents who selected a percentage inferior to 100% were then asked: As you don't work only with the corporate communication/PR department, with which other departments or functions do you work (Pick all that apply). For response options, see the chart "Agencies assignments not coming from CC/PR."

8. Career development

8.1 Social media: The most needed expertise among communication professionals

Data on the areas in which professionals feel the need for development are similar to the last editions of the report [65]. The majority of professionals claim to have either one (33.9%) or two (35.7%) areas in which they need further development. Only a small proportion claims to have four (1%) or five needs (2.6%), and 12.8% indicated that they have no needs at all.

Needs in areas of expertise (%)



The specific priorities of communication professionals in terms of areas of expertise in which they feel they need development have not changed since 2011. “Management of communication tools and channels” (53.3%) and “research and measurement” (34.4%) remained the two areas in which professionals feel they need more development.

Organizations and agencies have very similar needs, with the exception of “business expertise” – a need more common among professionals working in agencies (30.5% vs. 23.1%*,).

Looking instead at the different types of organizations, private organizations are more likely to manifest a need for “communication expertise” (37.1%) and “research and measurement” (45.7%). Non-profit organizations or associations instead have a higher need for development in the “management of communication tools and channels” (60.4%). Joint stock companies most need “personal skills” (35.2%).

Some differences also exist across the different sectors, as shown in the next table. For instance, only 25% of the professionals in the Banking, Insurance and Finance sector feel a need for more “personal skills”; the proportion is higher in the Chemical, Pharmaceutical and Health sector as well as in the Telecommunications and Media sector (36.4% and 37.5%, respectively).

[65] Q26 (asked to all): In which areas do you personally need more expertise today? Please, if possible, specify the topics that come to mind in the areas of expertise you have selected. (Pick all that apply.) For the possible response options (reasons), see the chart “Needs in areas of expertise.”

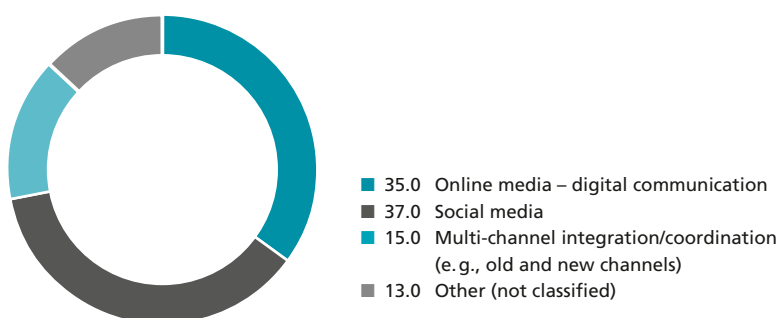
Professional development needs across sectors (%)

	Comm. tools & channels	Research & measurement	Comm. expertise	Personal skills	Business expertise	No needs
Average	53.3	34.4	24.2	26.3	26.3	12.8
Telecomm. & Media	62.5	25.0	37.5	37.5	25.0	12.5
Banking, Insurance and Finance	48.4	38.7	29.0	25.8	25.8	12.9
Chemical, Pharmaceutical and Health	36.4	40.0	18.2	36.4	36.4	18.2

Respondents were asked to specify their needs within each of the selected areas of expertise [66].

In the “management of communication tools and channels,” the areas most often mentioned by respondents were “social media” (37%), “online media–digital communication” (35%), and “multi-channel integration/coordination” (15%). These needs reflect those mentioned in 2011, although “social media” became the most often mentioned need.

Needs in management of communication tools and channels (%)



When it comes to the specific needs in “research and measurement,” as in 2011, most respondents specified needs in “evaluation and measurement (methods and tools, including social media evaluation tools)” [67] (63%). Respondents also mentioned the need for more knowledge about “controlling” [68] (14%) and “new trends and developments” (12%) [69].

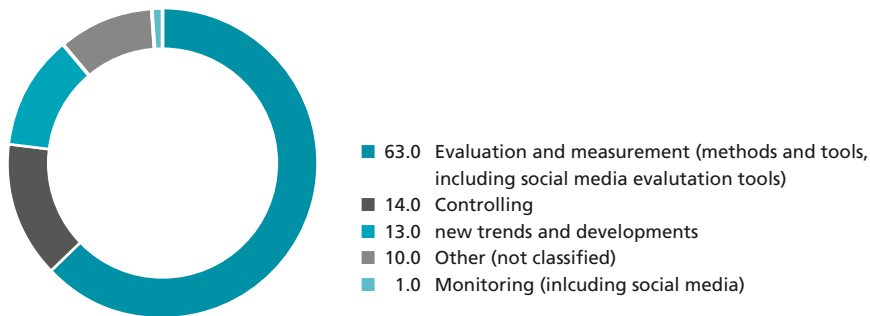
[66] Communication expertise (Management of communication tools and channels/General management/Research, measurement/Personal skills) was chosen as an area where you currently need more expertise. Please, if possible, specify the topics that come to mind in this area you have selected. These indications have been provided in an unprompted way, increasing their intrinsic value.

[67] Examples of items include: “evaluation methods”, “KPIs for social media”, and “simple and state-of-the-art measuring methods”.

[68] Examples of items include: “communication controlling”, “controlling for social media platforms”, and “online instruments for measuring returns”.

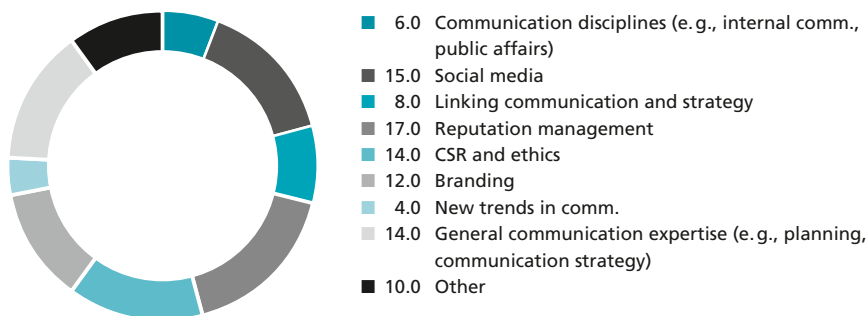
[69] Examples of items include: “new possibilities with the internet”, “new trends”, and “knowing about new possibilities”.

Needs in research and measurement (%)



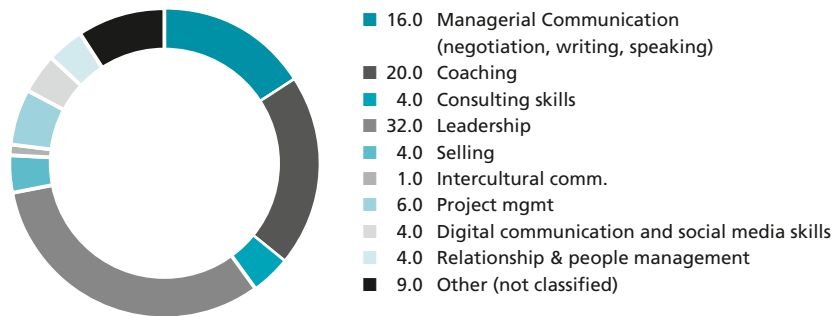
In “communication expertise,” respondents mentioned many specific needs, mostly in the area of “reputation management” (17%), “social media” (15%), “CSR and ethics” (14%), and “general communication expertise (e.g., planning, communication strategy)” (14%). Social media often came up in this category (beyond communication tools and channels), signaling the pervasiveness of this topic across categories. As in 2011, “reputation management” and “CSR and ethics” remained among the areas where professionals feel the most need for professional development.

Needs in communication expertise (%)



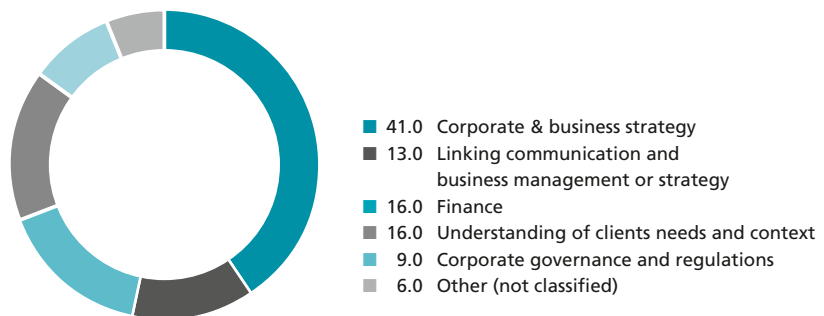
When it comes to “personal skills,” respondents’ answers are mostly in the areas of “leadership” (31%), “coaching” (20%), and “managerial communication (negotiating, writing, speaking)” (16%). These areas reflect those mentioned in 2011.

Needs in personal skills (%)



Last, the in area of “business expertise,” most respondents’ needs fall in the area of “corporate and business strategy” (41%), followed by “finance” (16%) and the “understanding of clients’ needs and context” (16%).

Needs in business expertise (%)

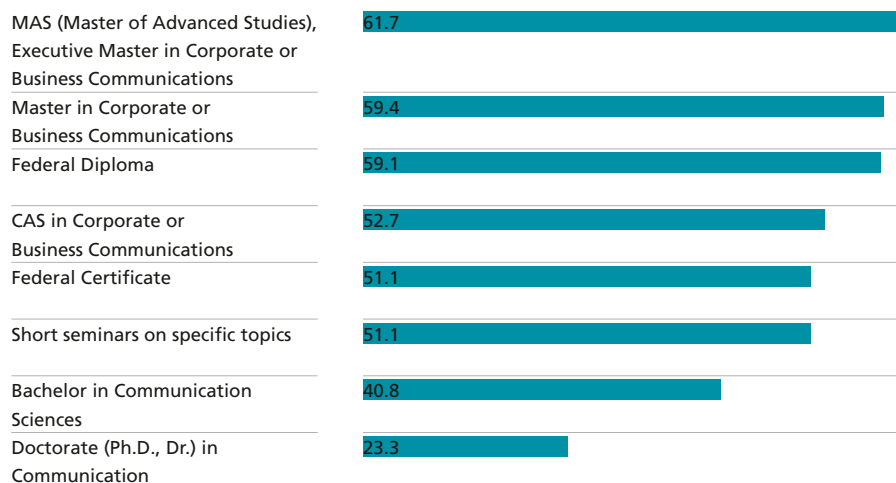


8.2 Joint stock and private companies consider Master of Advanced Studies and Executive Master programs to be the most relevant for the profession

When asked about the relevance of different educational programs for the profession [70], most respondents indicated that the “MAS (Master of Advanced Studies) Executive Master in Corporate or Business Communications” as highly relevant programs (61.7%), followed closely by “Master in Corporate or Business Communication” (59.2%) and “Federal Diploma” (59.1%).

[70] Q27 (asked to all): In your experience, how relevant are the following types of educational programs for the profession? (1 = not at all relevant; 5 = very relevant; + I don't know). Scale points considered: 4–5. For the possible response options, see the “Perceived relevance of educational programs for the profession” chart.

Perceived relevance of education programs for the profession (%)



The perceived relevance of these three educational programs remains relatively similar across agencies and organizations as well as different types of organizations, sectors and professional profiles, with some exceptions. For instance “MAS (Master of Advanced Studies), Executive Master in Corporate or Business Communications” are perceived to be more relevant by respondents working in private companies (76.7%) and joint stock companies (67.2%), but relatively less relevant by respondents in non-profit organizations or associations (51.4%).

8.3 Almost two thirds of CC/PR professionals have also worked in fields other than corporate communication and public relations

According to the data, 63.3% of professionals claim to have worked in fields other than corporate communication/public relations, whereas 36.7% have always worked in CC/PR [71]. The percentage of professionals who have always worked in CC/PR is slightly higher in joint stock companies (42.3%) and private companies (40%), but lower in government-owned organizations or political institutions (32.8%).

Some differences exist across demographic profiles. For instance, 41.2% of women have always worked in CC/PR whereas only 31.3% of men have (**). Also a higher proportion of professionals (**) with more than ten years of experience have always worked in CC/PR (42.2%) than professionals with between six and ten years of experience (26.4%) or fewer than five years of experience (30.9%).

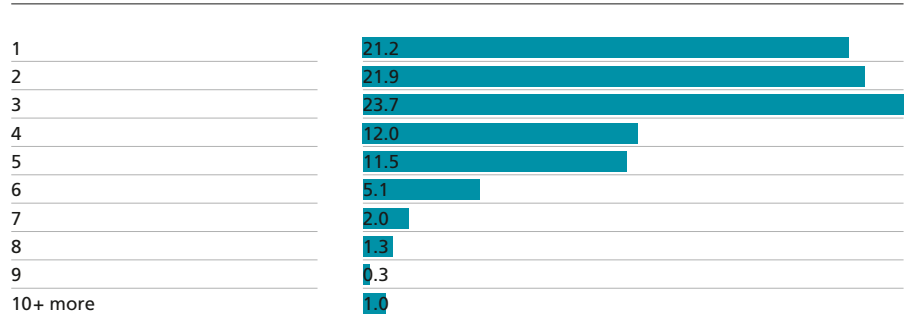
Looking at the number of positions held in CC/PR (Average: 3.1) [72], the majority has worked with three employers in total (23.7%), followed by those

[71] Q28 (asked to all): Have you always worked in a corporate communication/public relations function? Response options: Yes; No.

[72] Q27 (asked to all): In your experience, how relevant are the following types of educational programs for the profession? (1 = not at all relevant; 5 = very relevant; + I don't know). Scale points considered: 4–5. For the possible response options, see the “Perceived relevance of educational programs for the profession” chart.

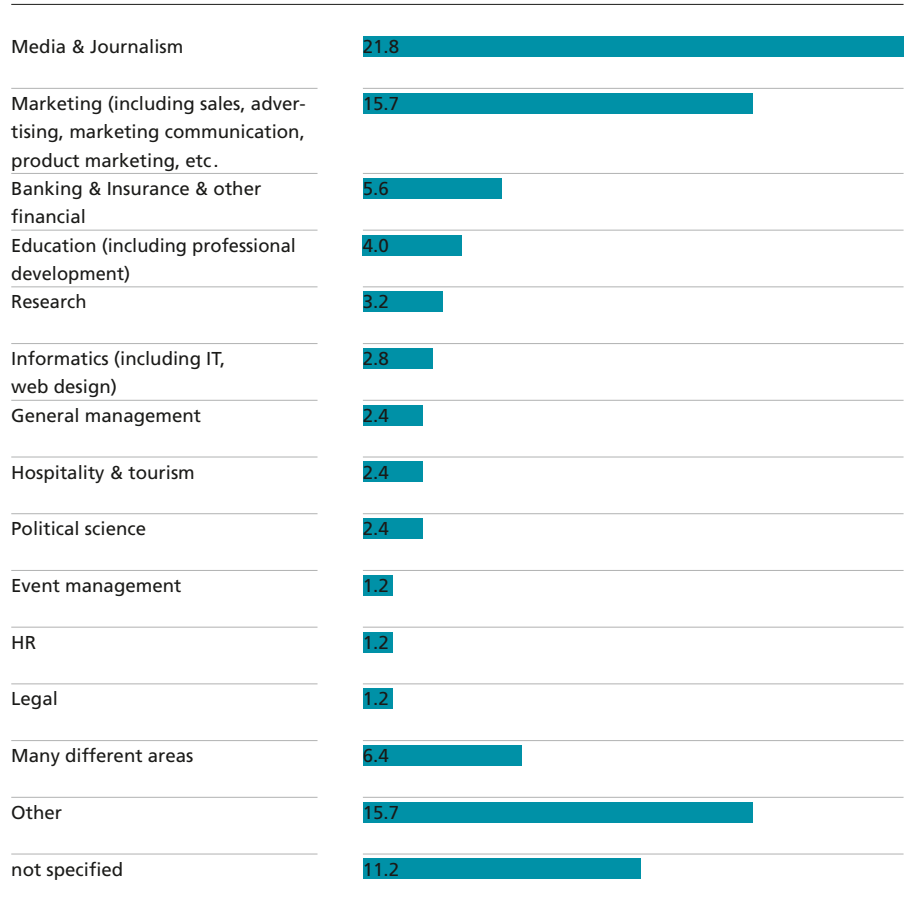
who had two employers (21.9%) and those who only had one (21.2%). 12% of CC/PR professionals has worked for four employers and 11.5% for five.

Number of employers in CC/PR (%)



When looking at the areas in which CC/PR practitioners were working before their CC/PR career [73], most come from journalism (21.8%) and marketing (including sales, advertising, marketing communication, product marketing, etc.).

Previous professions of CC/PR professionals (%)



[73] 28a (open answer), for professionals answering that they had worked in fields other than CC/PR: In which field?

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