swiss observatory

CORPORATE COMMUNICATION AND PUBLIC RELATIONS

Corporate Communication and Public Relations Practice Monitor

2010 Report

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

Sponsored by
YJOO Communications, Linkgroup
and Adecco, Adwired

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.

Association of PR Agencies in Switzerland (BPRA)
www.bpra.ch

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.

HarbourClub
www.harbourclub.ch

pr suisse, the Swiss Public Relations Association (SPRV)
pr suisse is a professional organization with more than 1,700 members in seven regional divisions. Founded in 1954 as the Swiss Public Relations Society (SPRG), with the scope of supporting the development of the profession as well as of specialized educational programs, the association today also administers the federal examination board for PR professionals (Prüfungskommission) as well as the professional register (Berufsregister).

pr suisse, the Swiss Public Relations Association (SPRV)
www.pr-suisse.ch

Swiss Public Relations Institute (SPRI)
SPRI, founded in 1969, provides undergraduate and continuing education opportunities for communications specialists, emphasizing direct and practical experience. SPRI takes a holistic approach to the training of communications practitioners, offering an education that is both academic and practical. With more than 8,000 graduates to date, SPRI conducts courses in Zurich, Berne, Lausanne and Geneva. Its 120 lecturers represent a wide cross section of Swiss PR practitioners, further strengthening SPRI's vital link to the communications community.

Swiss Public Relations Institute (SPRI)
www.spri.ch

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.

Università della Svizzera italiana (USI)
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About this report

The following four main aims formed the base for the 2010 Swiss Corporate Communication and Public Relations Practice Monitor:

- investigate the profession's practices and their evolution
- evaluate the integration of the communication practice within the management practice
- identify trends influencing communication practice
- detect the needs for educational and personal development

Survey methods

The survey was administrated online from February 10 to 28, 2010. Questions were available in four languages: German, French, Italian, and English.
The survey included 29 questions structured in 4 main parts: (1) domain, (2) management, (3) professional development and (4) demographics. Respondents required approximately 15 to 20 minutes to complete the questionnaire.
The formulation of each question was differentiated in order to take into consideration the six different respondent profiles (i.e. agency CEO, agency professional with budget, agency professional without budget, company CCO, company professional with budget, and company professional without budget). Professionals from public administration, non-profit organizations, and/or non-governmental organizations were asked to answer questions formulated under the company category.

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, 513 valid replies (approximately a 15 % response rate) were analyzed.

Analysis

Descriptive statistics were used to analyze the data. The 19 questions of the main part of the questionnaire were also cross-analyzed with most of the demographic data that emerged from the remaining 10 questions. Some of the 19 questions were cross-analyzed with non-demographic data as well (e.g. data signaling the level of strategic focus in the communication practice).
Finally, where possible and appropriate, some data were compared to the results of the European Communication Monitor (ECM) and the American Generally Accepted Practices (G.A.P.) study.
Only statistically significant results were considered (Cramer's V test, where $p \leq 0.05$). In addition, some totals may not equal 100 % due to rounding.

Authors

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- Markus Berger, Director SPRI & Board Member SPRV
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- Stephan Howeg, Global Head Group Communications, Adecco management and consulting S.A. & Board Member HarbourClub and SPRI
- Regula Ruetz, ruweba kommunikation ag & President pr suisse
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Quotation

Lurati, F., Aldyukhova, T., Dixius, U., and Reinhold, J. (2010), Swiss Corporate Communications and Public Relations Practice Monitor. Zurich and Lugano: Swiss Corporate Communications and Public Relations Observatory

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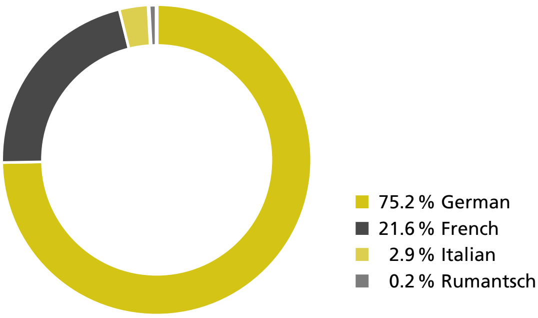
1. Demographics

1.1 Respondents' general profile

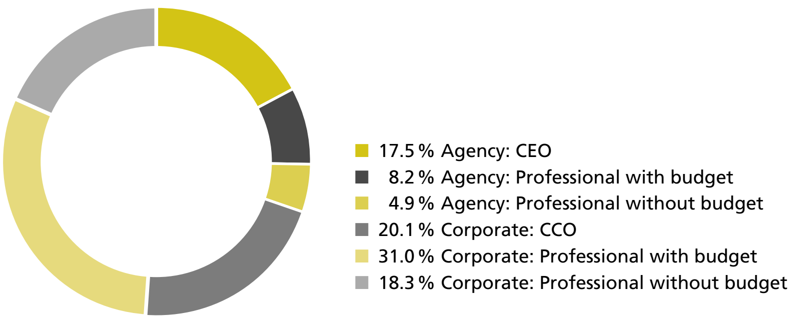
A total of 513 public relations and communication specialists participated in the first Swiss Observatory Practice survey. Of these respondents, 356 work in companies, while the remaining 157 come from public relations agencies and communication consultancies. The survey reached all linguistic regions of Switzerland, with 75.2 % of participants originating from the German-speaking part [1].

Language regions (%)



A large number of company CCOs along with agency CEOs participated in the survey. In fact, 17.5 % of all respondents are CEOs of a public relations agency or a communication consultancy and 20.1% are CCOs of companies. The majority of the respondents – 31.0 % – are company professionals with budget responsibility [2].

Respondents' position in the organization (%)

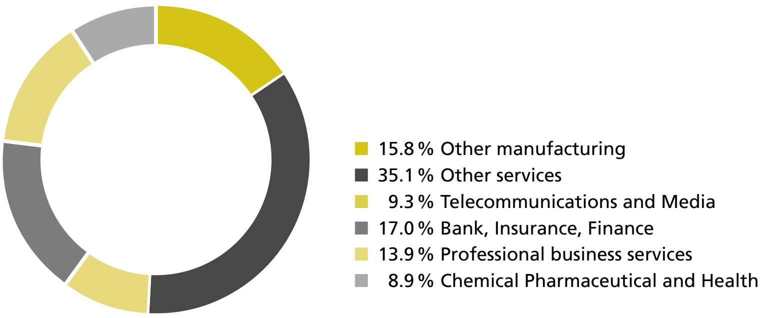


[1] Q 27 (asked to all): In which part of Switzerland are you normally based? Response items: German-speaking part, French-speaking part, Italian-speaking part, Rumantsch-speaking part.

[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) Company: CCO; (5) Company: Professional with budget; and (6) Company: Professional without budget. In the current report, footnotes in italics 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.

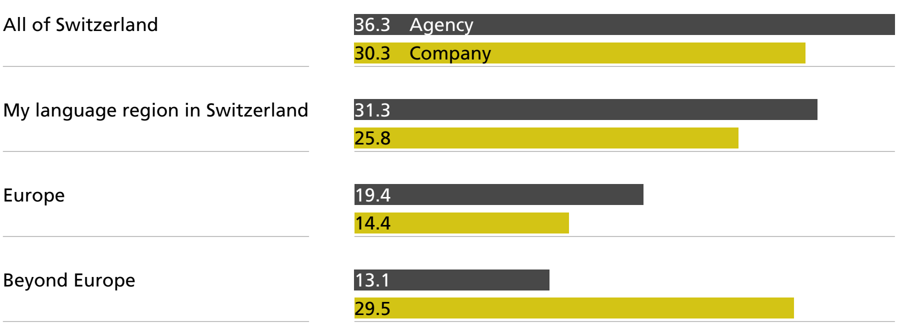
Taking a closer look at the respondents working in companies, most work in Joint stock companies (30.3 %), followed by Government-owned organizations or Political institutions (24.4 %) and Private companies (23.9 %) [3]. Meanwhile, 11.5 % work for Nonprofit organizations or associations and 8.4 % are employed in other types of companies. Further analysis shows that, of the respondents who chose Joint stock or Private company, 35.1% are working in Other services [4], such as energy and water supply, construction, retail, and tourism, while 17.0 % belong to the Bank, Insurance and Financial sector.

Respondents by sectors (%)



Companies across all sectors are operating on a more international level than agencies and consultancies. According to the data, the professional activity of 29.5 % of all company respondents reaches “Beyond Europe”, but only 13.1% of agency respondents fall into the same category [5]. For most respondents (32.2 %), the overall reach of their professional activity is Switzerland.

Reach of business activities (%)



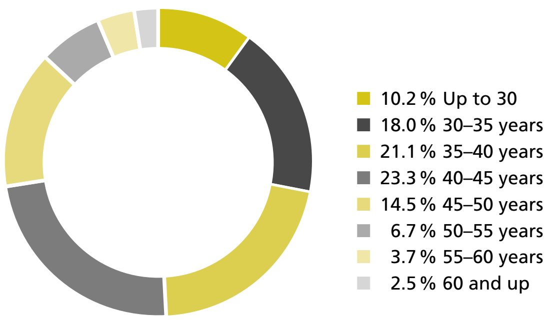
[3] Q 20a (asked to all): Where do you work? Response items: Joint stock company (multiple owners, quoted on the stock market), Private company (small number of owners, not on the stock market), Government-owned organization or Political institution, Nonprofit organization or association, Communication consultancy, Public relations agency, Freelance consultant, Other.

[4] Q 20b (asked to all): If you work in a Joint stock company or a Private company, please specify the sector. 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).

[5] Q 28 (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.

An obvious pattern stands out in the relationship among age, years of experience and position: seniority within the companies and agencies increases with age. Most respondents are between 35 and 45 years old (44.4 %) [6] and have more than 10 years of professional experience (56.1%) [7]. Meanwhile, 26.5 % of respondents have 6 to 10 years of professional experience whereas 17.3 % have less than 5 years of experience in the communication and public relations profession. A greater percentage of people with more than 10 years of experience work in agencies than in companies (70.6 % vs. 49.6 %).

Age of the respondents (%)



Approximately half of the respondents (49.3 %) hold a Master's (M.A., M.Sc., Mag., M.B.A.) or a Diploma (Lizenziat) degree [8]. Compared to European professionals (European Communication Monitor 2010 – ECM 2010 [9]), fewer public relations and communication professionals in Switzerland have an academic degree. According to the data, 59.3 % of ECM respondents hold a Master's or a Diploma degree whereas 49.3 % in Switzerland do. A similar situation exists with regard to Doctorate and Bachelor degrees (Doctorate: 7.3 % ECM vs. 4.9 %, Bachelor: 26.9% ECM vs. 9.6 %).

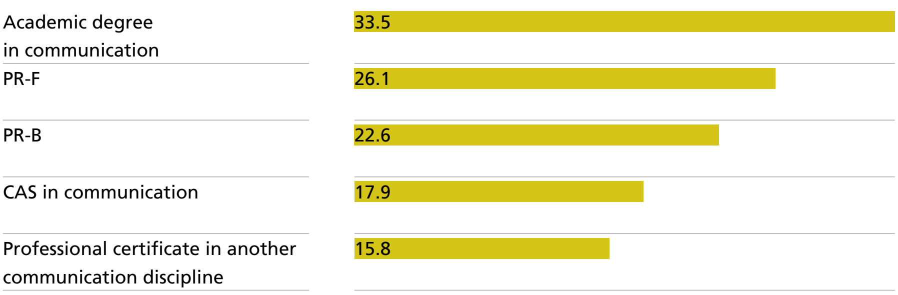
Educational qualification (%)

Doctorate	4.9
Master, Diploma	49.3
Bachelor (B.A.)	9.6
Federal Certificate	20.3
Eidg. Diploma	13.6
No qualification	2.3

[6] Q 21 (asked to all): How old are you?
[7] Q 23 (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.
[8] Q 24 (asked to all): Please state the highest educational qualification you hold. Response items: No qualification, Eidg. Dipl., Federal Certificate (eidg. Fachausweis, Brevet federal, attestato professionale federale), Bachelor (B.A.), Master (M.A., M.Sc., Mag., M.B.A.), Diploma (Lizenziat), or Doctorate (Ph.D., Dr.).
[9] Zerfass, A., Tench R., Verhoeven P., Verčič D., & Moreno A. (2010): European Communication Monitor 2010. Status Quo and Challenges for Communication Management in Europe – Results of an Empirical Survey in 46 countries. Brussels: EACD, EUPRERA.

Respondents were asked specifically about their communication qualifications. The results indicate that 33.5 % obtained their communication qualification in an academic communication program [10]. The proportion of respondents with a PR-F, PR-B or CAS in agencies and companies differs significantly. Whereas 29.5 % of company respondents hold a PR-F, 18.8 % in agencies do. A similar situation applies for CAS: 20.4 % for companies and 12.5 % for agencies. However, PR-B is more popular for agencies than companies (35 % and 17 %, respectively).

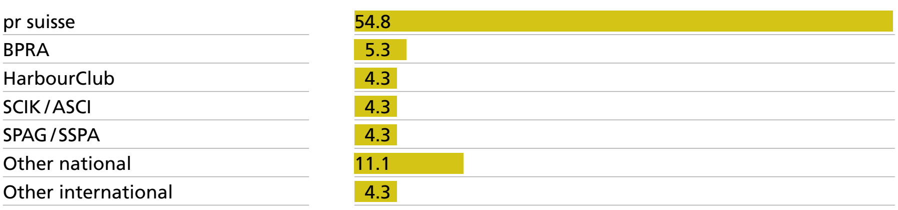
Communication qualification (%)



1.2 A highly networked profession

Almost 70 % of the Swiss public relations and communication professionals are members of a national or international professional organization. Most respondents have an affiliation with pr suisse (54.8 %) [11]. In general, more agency than company respondents are members of a professional organization (e.g., pr suisse: 66.3 % vs. 49.6 %).

Member of a professional organization (%)

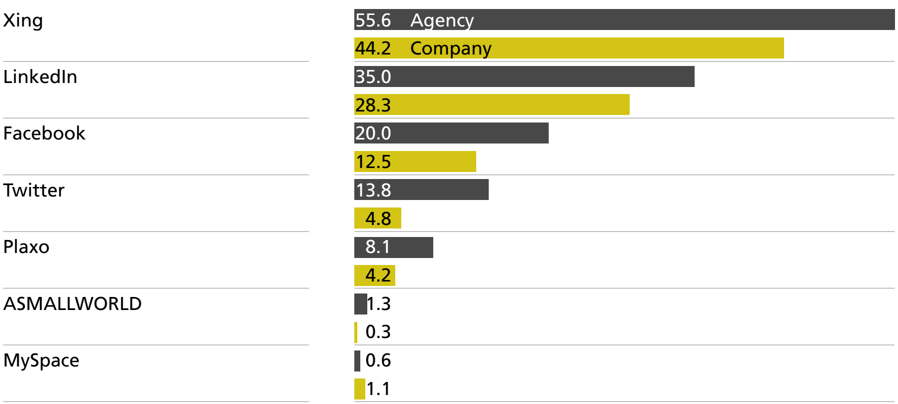


Markus Berger, eidg. dipl. PR-Berater BR / SPRV, Director SPRI "Networks are the key to making a professional difference. Over half of Switzerland's PR professionals are actively involved in social networks. However, the fact that 70 % of all PR professionals also belong to a professional organization shows that virtual networking platforms do not replace face-to-face interaction and that the interpersonal exchange of ideas is still highly valued. It is for precisely this reason that the Swiss Public Relations House came into being as a powerhouse and service center for the entire industry, enabling the industry organizations to serve their members better while further increasing PR professionalism in Switzerland."

[10] Q 25 (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 another communication discipline, Academic degree in communication (Bachelor / Master / Doctorate).
[11] Q 26 (asked to all): Are you a member of a professional organization? For the possible response options see the chart "Member of a professional organization".

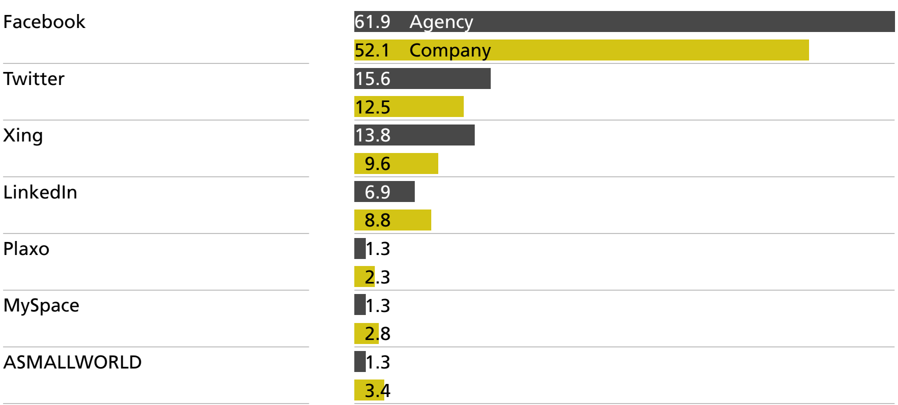
Furthermore, agency and communication consultants navigate social networks for their personal use more than professionals from companies (85.6 % vs. 80.2 %) [12]. Xing is the top-ranked social network used by most respondents (55.6 % in agencies and 44.2 % in companies) to communicate their professional profile, while LinkedIn ranks second, with 35.0 % for agencies and 28.3 % for companies. As expected, ASMALLWORLD and MySpace are at the bottom of the list, accounting for only 0.6 % and 1.1% of all respondents.

Social media usage with professional profile (%)



For personal use, most respondents give preference to Facebook: 61.9 % of agency respondents and 52.1% of company respondents. Twitter follows, with 15.6 % and 12.5 %, respectively, for agency and company respondents. ASMALLWORLD (total of 2.7 %), MySpace (total of 2.3 %), and Plaxo (total of 1.9 %) do not exceed 5 %.

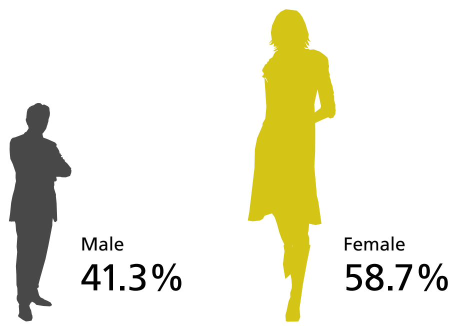
Social media usage with private profile (%)



[12] Q 29a (asked to all): Do you use social networks? Q 29b: If "yes", which of these social networks are you a member of? Categories: With my professional profile, with my private profile. For the possible response options, see the chart "Social media usage with professional profile".

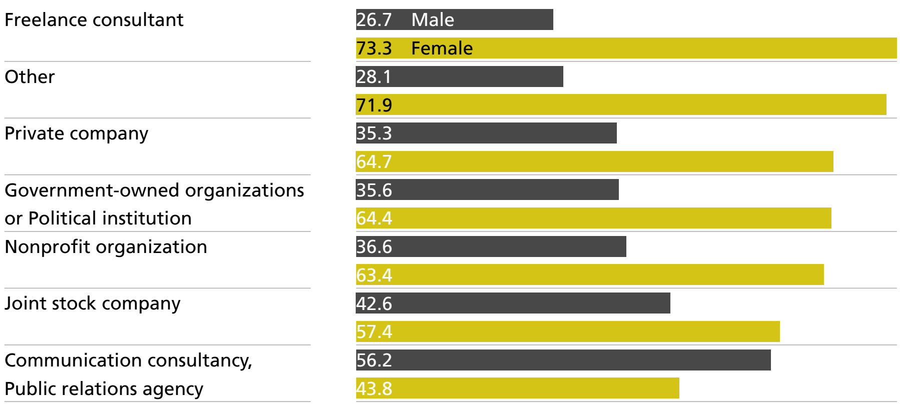
1.3 Gender: women outnumber men, but do not yet outpower them

The data indicate that 58.7 % of the respondents are women. This proportion is greater in companies, where women account for 64.2 % of respondents. The female-to-male ratio in agencies is almost 1:1, with 52.7 % men and 47.3 % women. The Swiss situation is very similar to the European one, where the overall proportion of women working in communication and public relations is 55.8 % (or 2.9 percentage points lower than in Switzerland). [13].



The number of women working in public relations and communication positions in the following types of company is almost double the number of men: Nonprofit (63.4 % female vs. 36.6 % male), Government-owned organizations or Political institutions (64.4 % female vs. 35.6 % male), and Private (64.7 % female vs. 35.3 % male) organizations, while men outnumber women only in communication consultancies and public relations agencies, where they account for 56.2 % of the workforce.

Gender in types of company (%)

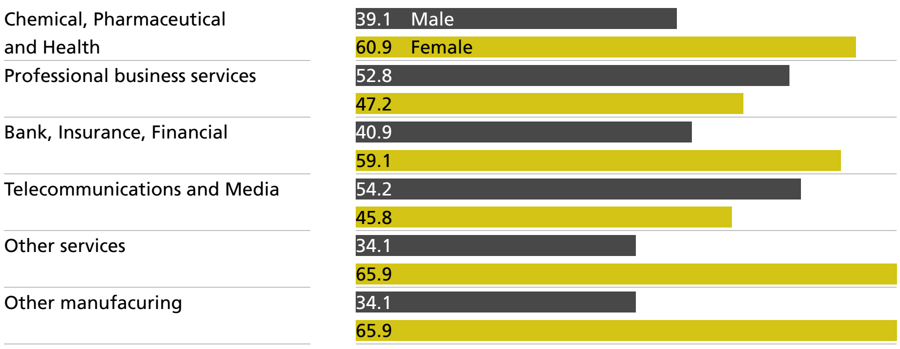


Suzanne Rouden-Schmidlin, Rouden & Partners and President of the Federal examination board for PR professionals, Prüfungskommission, pr suisse "The Swiss PR scene is clearly dominated by women in terms of sheer numbers. We have seen this trend quite clearly in the past several years among students working toward both the PR Consultant Diploma and PR Professional Certificate. However, leading positions in communication and PR – particularly in consultancies and agencies – are primarily occupied by men. Thus, a discrepancy exists between educated PR specialists and professional reality. As the examination body for pr suisse, we are particularly interested in this situation and are watching its further development with interest."

[13] Zerfass, A., et al. (2010), European Communication Monitor (ECM): Q 19: What is your gender?

When looking at the distributions of females and males by sector, in several sectors the number of women is almost double the number of men. The Chemical, Pharmaceutical and Health sector is made up of 60.9 % of women vs. 39.1% of men. The Other services sector employs 65.9 % of women and 34.1% of men, while the Other manufacturing sector also engages 65.9 % women and 34.1% men. The proportion changes in Telecommunications and Media, where men account for 54.2 % of employees and in Professional business services where 52.8 % of employees are men.

Gender in sectors (%)



When looking at the positions held by respondents across all companies, women do not yet outpower men in all areas. In fact, CEO positions in agencies and consultancies are still primarily occupied by men (62.2 % men vs. 37.8 % women). Furthermore, although 52.4 % of the company CCOs who responded are women, their strategic role remains limited. In fact, when it comes to strategic decision-making, more men claim to feel involved in a significant way. For instance, 50.6 % of men claim to be significantly involved in “Corporate governance” decisions, compared to only 33.2 % of women [14]. In addition, in corporate brand activities, male respondents claim to be more frequently “In charge” when it comes to the definition of “Corporate brand values and brand purpose” (31.6 % male vs. 21.3 % female) [15].

The number of women will increase in the future. In fact, the profession consists of more young women under 40 than men (69.8 % vs. 30.2 %). Thus, within the next several years, the distribution among genders based on the level of experience may change, reducing the advantage that men have (today 70.8 % of all male respondents have more than 10 years of experience while only 45.8 % of female respondents show the same length of experience), and raising the chance that women’s strategic role will increase.

[14] See Data Q 1, chapter 4.1: (Q 1 (asked to 1, 2, 4 and 5): (Company) How much do you feel involved in decisions concerning the following business aspects? (Agency) In your consulting activity, how much do you feel your clients involve you in the decision-making efforts 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”.

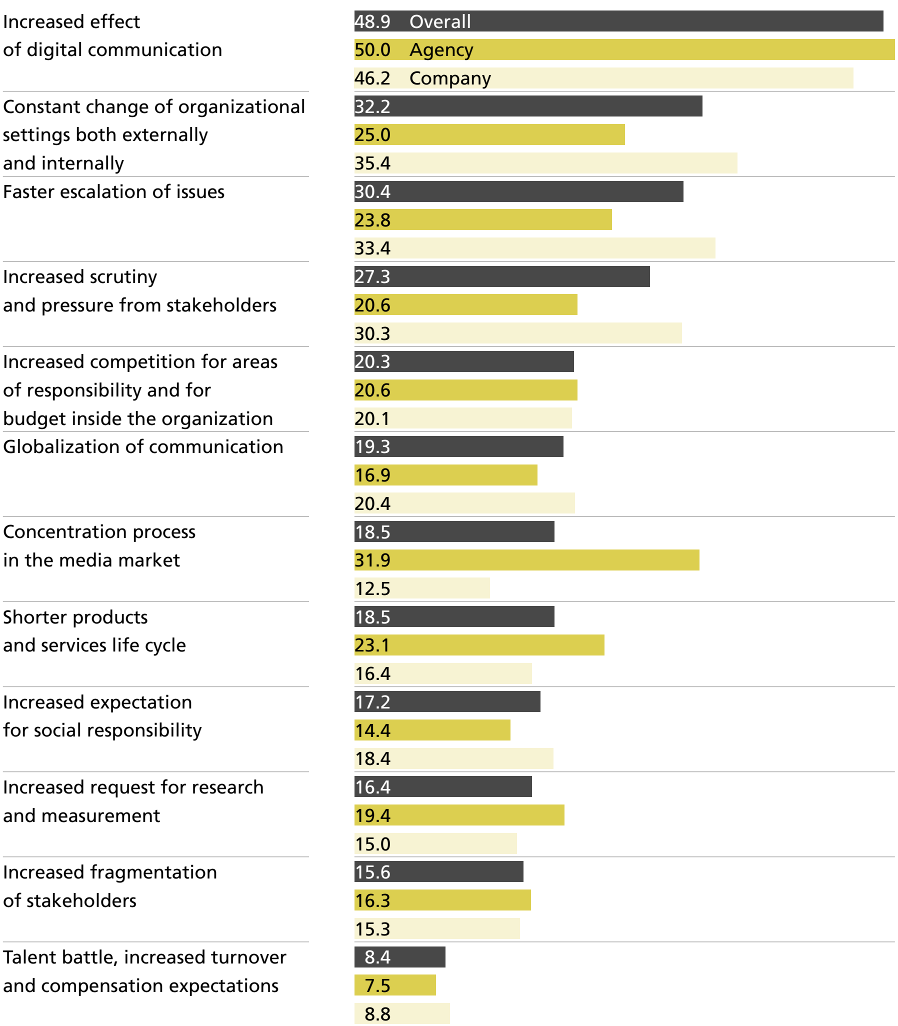
[15] See Data Q 4, chapter 4.2: (Q 4 (asked to all): (Company) To which extent are you involved in the following corporate brand activities? (Agency) In your consulting activity, are you involved in helping your clients with the following corporate brand activities? Response items: Definition of corporate brand values (organization’s guiding values and principles) and brand purpose (organization’s “fundamental reason for being”), Development of the corporate visual identity systems (i. e. logos, colors, typographies, images, etc.). Scale points for companies: Leading role, Supporting role, Not involved. Scale points for agencies: In charge, Involved, Not involved).

2. Industry trends

Digital communication: significantly outstripping all other trends

Four trends affecting communication activities are seen as the most important ones. The biggest trend, mentioned by almost half of the respondents (48.9 %), is the "Increased effect of digital communication". "Constant change of organizational settings both externally and internally" (32.2 %), "Faster escalation of issues" (30.4 %) and "Increased scrutiny and pressure from stakeholders" (27.3 %) are the remaining three most commonly picked trends influencing the profession [1].

Trends affecting the industry (%)



Matthias Graf, Chief Communications Officer, Ringier AG "Although a few years ago, digital communication was only a trend, today organizations who have failed to implement a certain level of digitization are falling behind, and the gap is growing ever wider. The phenomenon is ubiquitous: the top four industry trends shown by the Observatory Survey are all linked to the increasing speed of digitization. The Internet fosters innovation. New models of interaction are exploding onto the scene, increasing the complexity of organizational behavior. This intensifies the degree of direct communication and participation between companies and stakeholders, demanding a new level of stakeholder management. As practically no control exists over online discussions, there is a further need for companies to significantly step up their issues management to become very proactive. It is high time for communication professionals to get themselves and their organizations fit for the era of digital communication – in all aspects."

[1] Q 9 (asked to all): Which of the following trends are affecting your activity the most? (Pick 3) For the possible response options, see the chart "Trends affecting the industry".

"Effect of digital communication" is seen almost equally by agencies and companies as the main trend affecting their activity (50.0 % and 46.2 %, respectively). Meanwhile, company respondents more often cited the "Constant change of organizational settings both externally and internally" (35.4 % vs. 25.0 %), the "Faster escalation of issues" (33.4 % vs. 23.8 %), and "Increased scrutiny and pressure from stakeholders" (30.3 % vs. 20.6 %) as trends affecting their activity. On the other hand, agency representatives were more likely to consider the "Concentration process in the media market" as the second most important trend (31.9 % vs. 12.5 %).

Looking more closely, by type of company, respondents of Nonprofit organizations mention a higher importance of the "Increased fragmentation of stakeholders" (13.7 percentage points more) than all other companies. Joint stock and Government-owned organizations or Political institutions are more often affected by a "Faster escalation of issues" than the average (+10.3 and +11 percentage points, respectively).

The results show that the trends influence what the profession does and what future issues will be. Trends may also help us in providing explanations for the results that emerge in respondents' answers to the other survey questions. For instance, the highest ranked trend (i. e., "Increased effect of digital communication") is reflected in the increased usage of digital media for communication and public relations [2]. Another example is evident when comparing communication disciplines. The discipline "Community relations" is predicted to increase in the future [3], which fits with the high-ranked trend of "Increased scrutiny and pressure from stakeholders". A third example is the low-ranked item "Increased request for research and measurement" (16.4 %), which corresponds with the fact that the measurement of communication activities is still to a certain extent carried out in a traditional way (i. e., output measurement) [4].

[2] See Data Q 7, chapter 3.2: (Q 7 [asked to 1, 2, 4, and 5]: (Company) 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. How much do you think this will be in 3 years? (Agency) 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 for your clients. How much do you think this will be in 3 years? (Percentage of time).

[3] See Data Q 3, chapter 3.3: (Q 3 (asked to all): The public relations / corporate communication function includes several disciplines. How important are these disciplines in your organization / consulting activity (if you are an agency) today? How important will they be in 3 years? (1 = not at all; 5 = very much; "does not apply"). Scale points considered: 4–5. For the possible response options, see the chart "Communication disciplines").

[4] See Data Q13, chapter 6: (Q 13 [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").

3. The Practice of Corporate Communication

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.

Disciplines

- Institutional communication
- Issue communication
- Internal communication
- Financial comm. & investor relations
- Public affairs
- Community relations
- Crisis communication

Activities ("actions")

Organizational
- New products and services
- New markets
- Strategic alliances
- Mergers and acquisitions (M&A)
- Organizational changes
- Corporate Social Responsibility (CSR)
- Corporate governance

Communicational
- Corporate brand value and brand purpose
- Corporate visual identity
- Partnership, alliances and coalitions with relevant stakeholders
- Sponsorship
- Philanthropy

Channels ("media")

- **Interpersonal communication**
- **Organizational media**
- **News media**
- **Advertising and promotional media**

3.1 Communication channels are all equally important

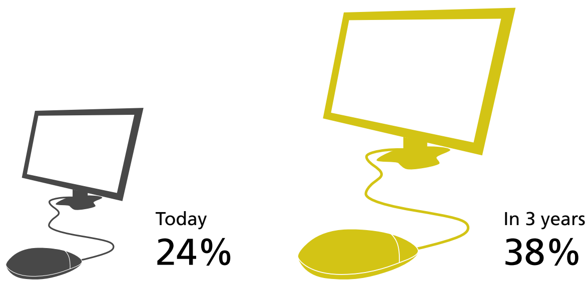
Communication professionals make almost an equal usage of the four main communication channels in their activities. The more marketing-related channel "Advertising and promotional media" is used by 18.2 %, making it less important than the remaining three categories: "Organizational media" (29.1%), "News media" (27.6 %) and "Interpersonal communication" (25.2 %). In addition, no significant changes are predicted for the future use of the four different channels, except for "Interpersonal communication", which – with a small 2.5 % increase – will become more relevant in the next three years [1].

Importance of communication channels (%)

Satoshi J. Sugimoto, Deputy Head Public Relations Switzerland, Novartis International AG and Board Member pr suisse
"Social media presents great opportunities for the healthcare industry. Patients and healthcare practitioners are increasingly making decisions based on healthcare information online, from blogs, and in online communities. Based on this trend, the healthcare industry needs to continue to use social media in a responsible way, better understanding and meeting the needs of patients and other key stakeholder groups."

3.2 Digital communication: from a "try-it-all" to a more focused approach?

Communication professionals spend approximately one quarter of their time producing and managing digital media (24 %). This usage will increase in the next three years (up to 38 %) [2].



[1] Q 6 (asked to all): (Company) Public relations/Corporate communication functions communicate through four channel categories. What is the relative importance of these channels in your organization today? What will the relative importance of these channels be in your organization in 3 years? (Agency) Public relations/Corporate communication functions communicate through four channel categories. Regarding the work done for your clients, what is the relative importance of these channels today? Regarding the work done for your clients, what will the relative importance of these channels be in 3 years? (Divide 100 % points among the four channel categories). Response items: Interpersonal communication, Organizational media, News media, Advertising and promotional media.

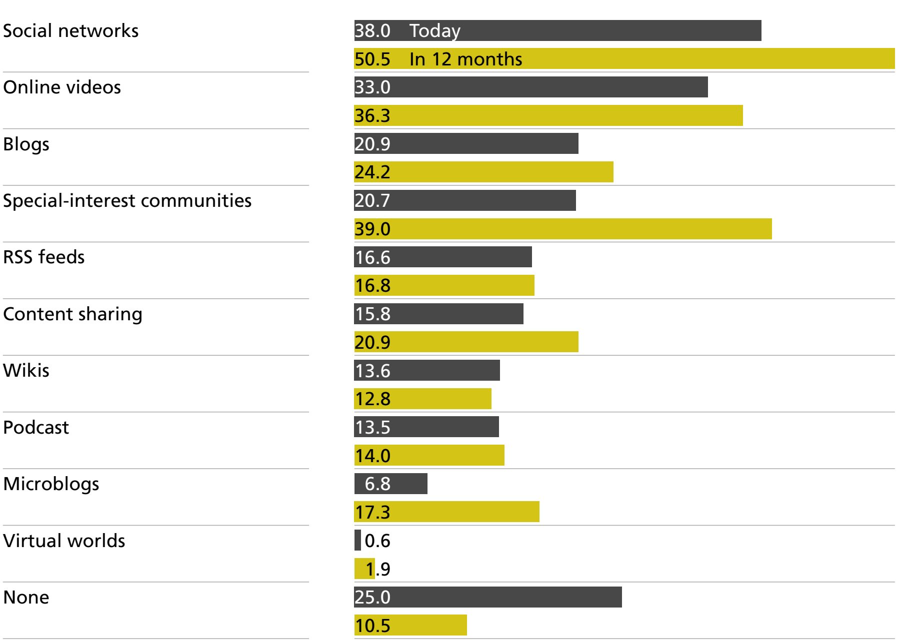
[2] Q 7 (asked to 1, 2, 4, and 5): (Company) Think about the relevance of digital communication (both: internal and external) in your activity. Please provide a rough estimate of the relative time you spend in producing this type of communication today. How much do you think this will be in 3 years? (Agency) 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 for your clients. How much do you think this will be in 3 years? (Percentage of time.)

Even today, companies operating worldwide view digital media as more relevant than companies working mainly in Switzerland. They spend 28 % of their time in producing and managing digital media (compared to companies working mainly in Switzerland, which spend only 22 % of their time).

When looking at the types of digital media, “Social networks” (38.0 %) are the most popular, followed by “Online videos” (33.0 %). Other digital communication tools are still in an initial try-out phase. However, the 12-month prediction shows that a more focused usage of digital media may emerge, particularly in regard to “Social networks”, “Online videos” and “Special interest communities” (an increase from 20.7 % to 39.0 %).

In addition, 25.0 % of the respondents claim that they are still not using digital media at all today; this proportion increases to 36.4 % for companies operating only in Switzerland.

Usage of digital media (%)



The usage of digital media changes with the type of company and geographical reach of the company’s activities.

“Social networks” are more often used by Private companies (41.2 %), Nonprofit organizations (41.5 %), and Consultancies (54.6 %) and less often used by Government-owned organizations or Political institutions (25.3 %) and Joint stock companies (27.8 %). Joint stock companies are heavy users of “Online videos” (46.3 % compared to the average of 33.0 %) whereas Government-owned organizations or Political institutions seem to prefer “Blogs” more so than others (26.4 % compared to the average of 20.9 %).

International companies with a worldwide or European-wide reach use more digital media than companies operating mainly in Switzerland or in their own region. However, locally focused companies are forecasting a greater increase in digital media usage in the next 12 months; for instance, regional companies foresee a 6.3 percentage point increase in “Blogs”, while European-wide companies predict only an increase of 0.9 percentage points.

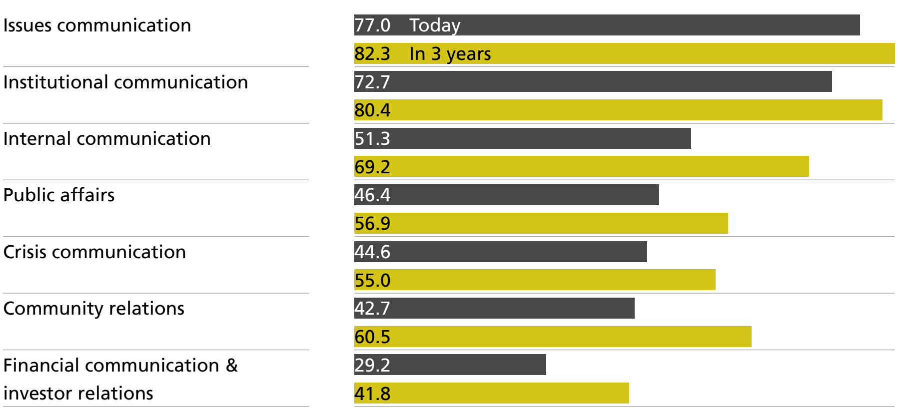
Gaby Tschofen, VP Corporate Communications & CSR, Barry Callebaut AG
“Unfortunately, the distrust many people have toward politicians and the state, as well as the business world and its leaders, has reached an all-time high. Great uncertainty exists as people are preoccupied by questions such as what will the future of the economy bring, what does the shift of geopolitical power mean, how safe is my job, how secure is my pension, etc. In a climate of such distrust and uncertainty, there is an increased need for explanations, for better orientation as well as a growing expectation for companies to engage in the communities in which they work – not least because of the ever-decreasing confidence in a highly indebted state. Careful attention to internal and community relations on the part of companies and institutions alike will undoubtedly become an increasingly important prerequisite for their success.”

3.3 Communication disciplines: the growing importance of community relations and internal communication

“Issues communication” and “Institutional communication” (77 % and 72.7 %, respectively) are seen as the most important communication disciplines by all respondents, and their importance seems expected to grow in the future. However, the highest future growth is expected in “Internal communication” (+17.9 percentage points) and “Community relations” (+17.8 percentage points) [3].

With the exception of Joint stock companies (58.3 %), on average companies consider “Financial communication and Investor relations” to be the least important discipline (29.2 %). However, this discipline is expected to increase in the next three years.

Communication disciplines (%)



The relevance of “Internal communication” is particularly expected to increase among Nonprofit and Government-owned organizations or Political institutions. In fact, 70.7 % of the Nonprofit organizations and 71.2 % of Government-owned organizations or Political institutions foresee a relevant increase in importance of this discipline (whereas currently only 30.0 % and 33.0 %, respectively, consider it important).

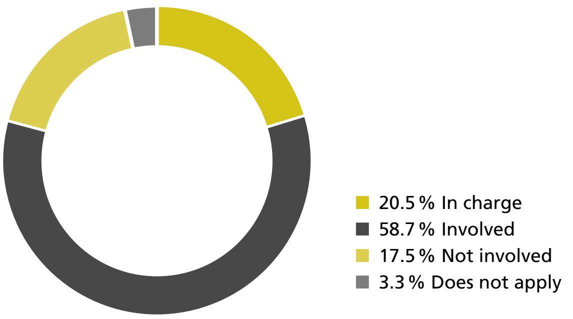
[3] Q 3 (asked to all): The public relations/corporate communication function includes several disciplines. How important are these disciplines in your organization/consulting activity (if you are an agency) today? How important will they be in 3 years? (1 = not at all; 5 = very much; “does not apply”). Scale points considered: 4–5. For the possible response options, see the chart “Communication disciplines”.

3.4 Communicators play a limited role in stakeholder partnerships, sponsorship and philanthropy

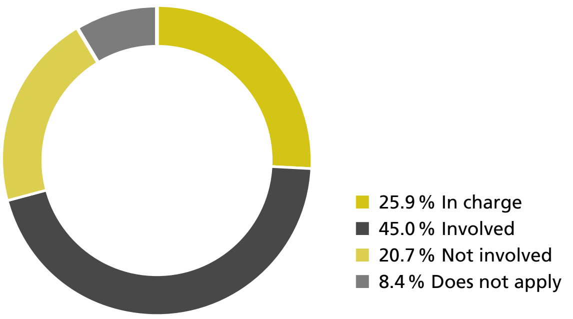
Less than one quarter of the respondents claim to be involved in the above communication areas with only 20.5 % stating that they are "In charge" or have a "Leading role" in "Partnerships, alliances and coalitions with relevant stakeholders". 25.9 % claim to have this level of involvement in "Sponsorship" while in "Philanthropy" the figure is just 15.4 % [4].

Across all three communication activities, the predominant response falls on the "Involved / supporting role" option. The involvement is greater for activities in the area of "Partnerships, alliances and coalitions with relevant stakeholders" than for "Sponsorship" and "Philanthropy".

Partnerships, alliances and coalitions with relevant stakeholders (%)

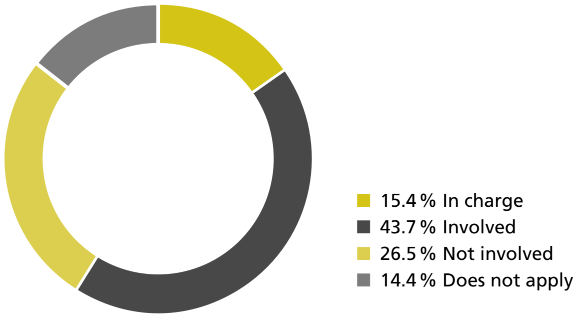


Sponsorship (%)



[4] Q 5 (asked to all): (Company) To which extent are you involved in the following activities? (Agency) In your consulting activity, are you involved in helping your clients with the following activities? Response items: "Partnerships, alliances and coalitions with relevant stakeholders", "Sponsorship", "Philanthropy". Scale points for companies: Leading role, Supporting role, Not involved. Scale points for agencies: In charge, Involved, Not involved.

Philanthropy (%)



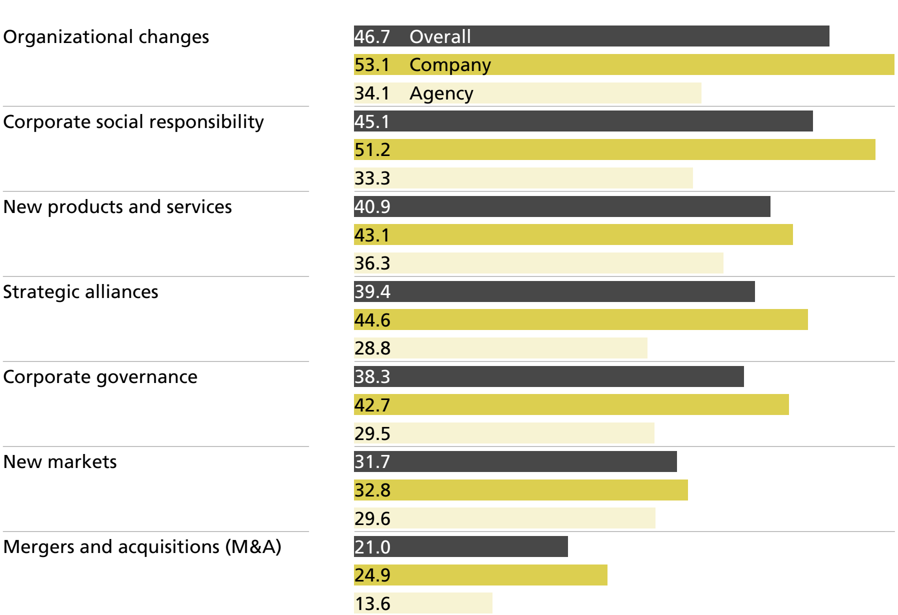
Looking at the data in more detail, more agency than company respondents are "In charge" when it comes to activities such as "Partnership, alliances, and coalitions with relevant stakeholders" (30.0 % vs. 16.1%). In regard to the other two activities – i.e. Sponsorship (29.5 % vs. 18.1%) and Philanthropy (19.5 % vs. 6.3 %) – company respondents show a higher level of being "In charge" than agency respondents.

4. Strategy

4.1 One third of all communication managers feel involved in business decisions

On average 37.6 % of respondents feel significantly involved in specific business decisions. “Organizational changes” refer to the business aspect in which more professionals (46.7 %) feel involved in the decision-making process. The business area in which the lowest number of respondents (21.0 %) feels involved is “Mergers and acquisitions” [1].

Involvement in business aspects (%)



Agency professionals (29.3 %) feel less involved in business decisions than company professionals (41.8 %), particularly for decisions concerning “Organizational changes” (34.1% vs. 53.1%), “Corporate social responsibility” (33.3 % vs. 51.2 %), “Strategic alliances” (28.8 % vs. 44.6 %), “Corporate governance” (29.5 % vs. 42.7 %) and “Mergers and acquisitions” (13.5 % vs. 24.9 %).

In companies, the strategic role is concentrated at the CCO level. In fact, the proportion of CCOs who feel that they play a role in most business decisions (with the exception of two items: “Strategic alliances” and “Organizational changes”) is clearly higher than the proportion of professionals with budget. On average, 50.2 % of the CCOs are involved in business decisions, whereas 36.3 % of professionals with budget are.

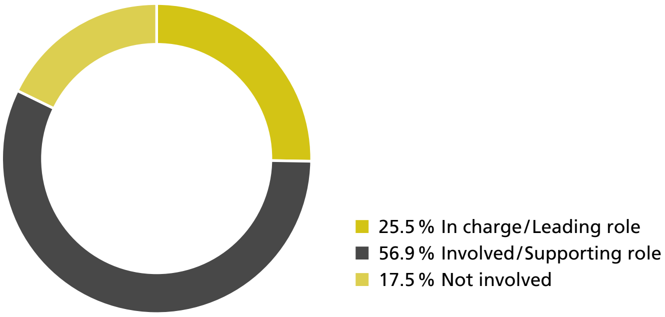
Francesco Lurati, Professor of Corporate Communication, Università della Svizzera italiana and Board Member SPRI “Helping design a company’s strategy is the real strategic contribution to which communication professionals should aspire. Helping implement the strategy – although an important part of the job – is not enough. It confines communication to the tactical level and constitutes a missed opportunity to maximize the strategy quality. Communication professionals should help companies make strategic decisions by considering their compatibility with the company’s culture and identity, its reputation, and the quality of its stakeholder relationships. Corporate branding should be the port of entry for such contributions. In this regard, Swiss communication professionals have room to improve their strategic impact.”

[1] Q 1 (asked to 1, 2, 4, and 5): (Company) How much do you feel involved in 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”.

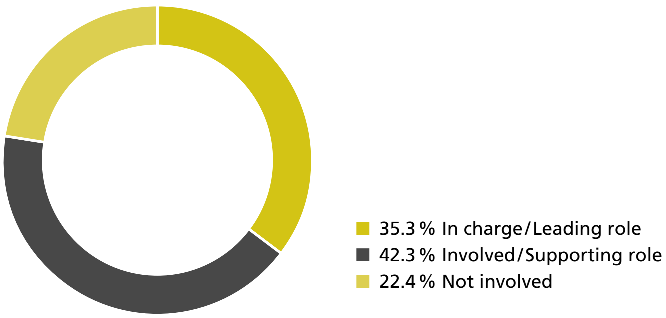
4.2 Communication professionals are partially in charge of corporate branding

In the definition of corporate brand values and brand purpose, only one quarter (25.5 %) of respondents declare themselves to be "In charge". For the development of the corporate visual identity systems, the percentage is higher 35.3 % [2].

Definition of corporate brand values and brand purpose (%)



Development of the corporate visual identity systems (%)



As expected, professionals in top positions are "In charge" more so than their colleagues who occupy lower echelons. The results indicate that 46.6 % of the CCOs claim to be "In charge" of the definition of corporate brand values and brand purpose, while only 20.1% of the Professionals with budget responsibilities and 7.4 % of the Professionals without budget responsibilities do. For development of the corporate visual identity systems, 64.1% of the CCOs claim to be "In charge", while 32.7 % of the Professionals with budget and 9.6 % of the Professionals without budget responsibilities do.

[2] Q 4 (asked to all): (Company) To which extent are you involved in the following corporate brand activities? (Agency) In your consulting activity, are you involved in helping your clients with the following corporate brand activities? Response Items: Definition of corporate brand values (organization's guiding values and principles) and brand purpose (organization's "fundamental reason for being"), Development of the corporate visual identity systems (i.e. logos, colors, typographies, images, etc.). Scale points for Companies: Leading role, Supporting role, Not involved. Scale points for Agencies: In charge, Involved, Not involved.

Furthermore, a distinct difference exists between agency CEOs and company CCOs, the latter being more involved in the definition of corporate brand values and purpose (46.6 % vs. 27.8 % for CEOs). The dissimilarity is even stronger when it comes to development of the corporate visual identity systems, with 64.1% of CCOs vs. 33.3 % of CEOs claiming to be “In charge”.

4.3 Interfunctional collaboration: surprising gap between Communication and HR

CCOs and corporate communication professionals with budget responsibilities declare that they have different levels of proximity than other corporate departments and functions [3].

The results indicate that 67.6 % claim to work closely with the “CEO”. Furthermore, 60.7 % signal that they work closely with the “Marketing department”; half declare that they collaborate very closely. However, the level of proximity with other functions is quite low; only approximately 20 % of respondents claim to have a close relationship with them. Such results are somewhat surprising when it comes to the relationship with the “HR” function (23.7 %), particularly if the increasing importance of internal communication is considered.

Interfunctional collaboration

	COM	Other	CEO	Marketing	HR	Finance	Legal	Board of Directors
1			2.7	6.5	13.4	13.7	24.0	28.2
2			3.8	3.1	18.7	22.5	19.5	22.5
3			26.0	29.8	44.3	42.0	36.3	29.8
4			56.9	31.3	17.6	17.6	17.2	15.6
5			10.7	29.4	6.1	4.2	3.1	3.8
4 + 5			67.6	60.7	23.7	21.8	20.3	19.4

[3] Q 12 (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 “Interfunctional collaboration”). All levels of closeness were considered.

Although statistically not significant [4], it is worth mentioning that the analysis by type of company finds that Joint stock companies indicate a below-average involvement with the "CEO" (56.6 %) and "Marketing" (48.2 %). Meanwhile, Private companies score above average on collaboration with the "CEO" (74.6 %), "Marketing" (65.1%), and especially "HR" (30.1%). As expected, Nonprofit organizations report an above-average involvement with the "Board of Directors" (37.6 %). Respondents working in Government-owned organizations or Political institutions are closer with the "Legal department" (31.1%) than respondents from other types of companies.

Close interfunctional collaboration by type of company

Type of company	CEO	Marketing	HR	Finance	Legal	Board of Directors
Joint stock	56.6	48.2	22.9	28.9	24.1	15.7
Private	74.6	65.1	30.1	19.1	11.1	14.2
Government-owned or Political institution	70.5	59	26.2	14.8	31.1	21.3
Nonprofit	81.3	81.3	12.6	18.8	9.4	37.6
Freelance consultant	50.0	50.0	0	0	0	0
Other	61.9	71.5	19.1	28.6	19.1	18.1

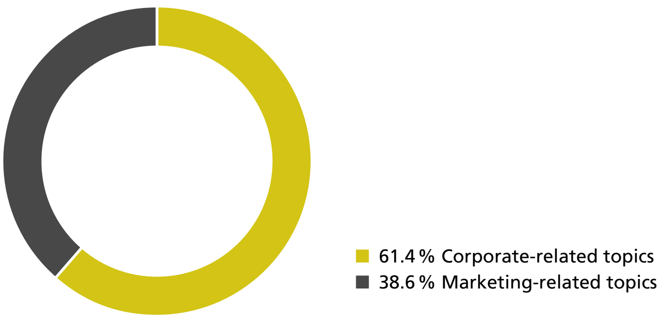
[4] T-tests: approximate significance for:
CEO: Cramer's V = .161, p-value = .130;
Marketing: Cramer's V = .186, p-value = .015;
HR: Cramer's V = .143, p-value = .380;
Finance: Cramer's V = .142, p-value = .385;
Legal: Cramer's V = .196, p-value = .004;
Board of Directors: Cramer's V = .145, p = .333

5. Relationship between Communication and Marketing Functions

5.1 Varying levels of integration between Corporate Communication and Marketing

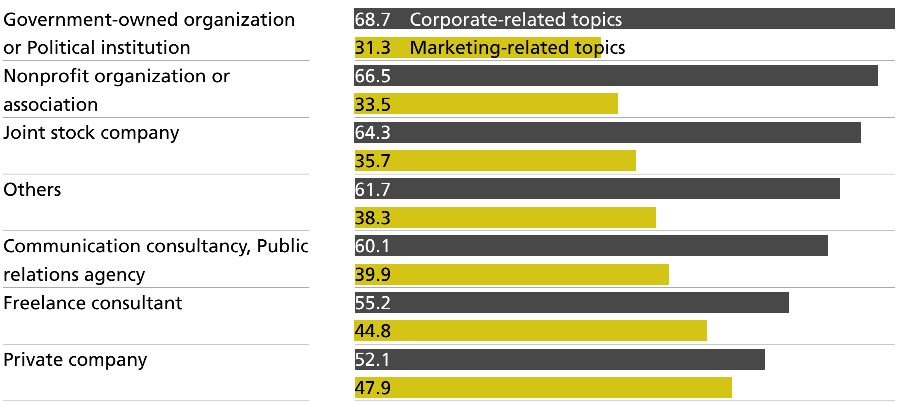
Corporate communication and public relations professionals engage in communication activities for both “Corporate-related topics” and “Marketing-related topics”. Three fifths of their efforts are spent on “Corporate-related topics”, while two fifths are focused on “Marketing-related topics” [1]. No significant difference exists between respondents working in agencies and those employed in companies.

Communication activity in Marketing-related and Corporate-related topics (%)



As expected, when looking at the data according to the type of company, more overlapping occurs in Private companies, where professionals cover “Corporate-related” and “Marketing-related” topics in almost the same proportion. Meanwhile, in Government-owned organizations or Political institutions, Nonprofit organizations and Joint stock companies, communication professionals are more specialized in corporate communication.

Communication and Marketing relationship by the type of company (%)



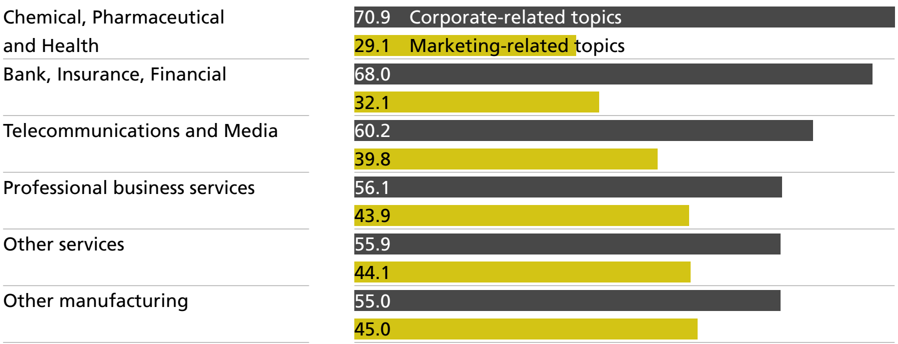
Dominique Morel, Partner, Head of Marketing & Communications, KPMG

“Volatile markets and increased competition demand early awareness of changes in the environment, more flexible business planning and quick responses to cultivate business opportunities. To achieve the right tempo, “corporate-related” and “marketing-related” topics must be given equal weight. The framework of a universal sales process guarantees that Marketing & Communications, together with other business units, can efficiently support sales both internally and externally. The major challenge in seamless collaboration is to unify the long-term cultivation of the firm’s image with the sales objectives. The brand as a mirror of the organization’s positioning that is also synonymous with its reputation is the point of reference for entrepreneurial and commercial decisions.”

[1] Q 2 (asked to all): (Company) 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.

Relevant differences are evident among the sectors. Chemical, Pharmaceutical, and Health as well as Banking, Insurance, and Financial sectors have the greatest communication effort focusing on "Corporate-related topics". The Telecommunications and Media sector is closer to the overall average, whereas other sectors more equally allocate between "Corporate-related" and "Marketing-related" topics.

Communication and Marketing relationship by sector (%)



5.2 Communication and Marketing, two independent but coordinated functions

The largest section of the respondents (41.6 %) perceive that the two functions are independent but coordinated (see next table for model 2). For these respondents, communication and marketing are integrated functions that – although overlapping – still maintain their autonomy. As model 3 indicates, 11.1% report a marketing-driven communication department, while 18.7 % (see model 4) signal that the communication department leads the marketing function. In addition, 10.7 % (see model 5) of the respondents declare that, in their case, equating the marketing department and communication department best corresponds to the circumstances of their company [2].

[2] Q 11 (asked to 4 and 5): Which of the following diagrams most clearly corresponds to the circumstances of your company? (Pick 1 diagram only) For the possible response options, see the chart "Marketing and Communication interrelation".

Marketing and Communication interrelation

Organizational model	1	2	3	4	5	6
	Com Mktg	Com Mktg	Mktg Com	Com Mktg	Com + Mktg	Does not apply
Average	**9.9 %**	**41.6 %**	**11.1 %**	**18.7 %**	**10.7 %**	**8.0 %**
Chemical, Pharmaceutical, Health	26.3 %	47.4 %	5.3 %	10.5 %	0.0 %	10.5 %
Bank, Insurance, Financial	36.0 %	52.0 %	4.0 %	4.0 %	4.0 %	0.0 %
Telecommunications and Media	12.5 %	31.3 %	37.5 %	0.0 %	18.7 %	0.0 %

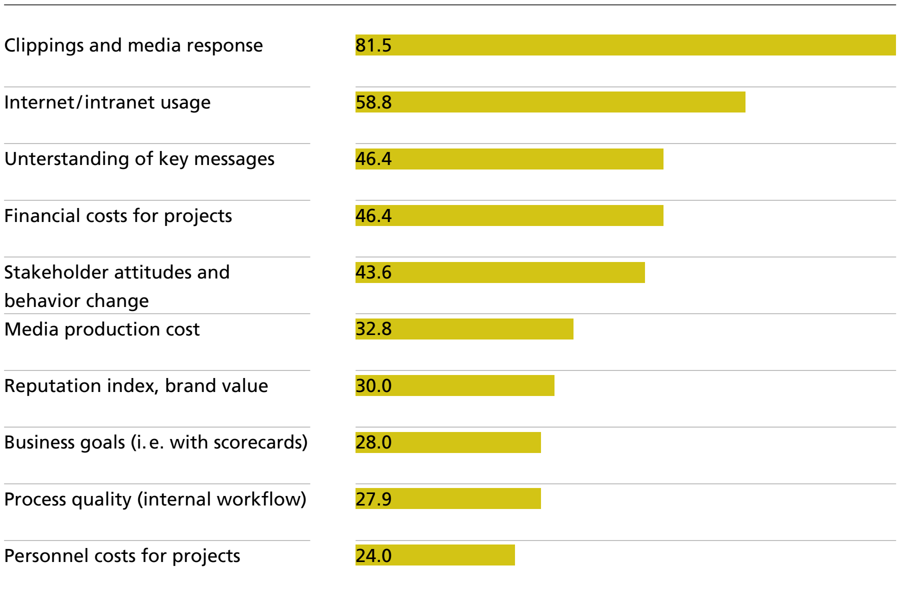
The prevailing organizational model (i.e. independent but coordinated communication and marketing functions) depicted in model 2 is even more dominant among Joint stock companies (54.2 %). Looking at the sectors, this model is more predominantly adopted by companies in the Chemical, Pharmaceutical, and Health sector (47.4 %) as well as in Banking, Insurance, and Financial (52.0 %) sectors. Furthermore, a relevant proportion of companies belonging to these two sectors seem to prefer an even stronger specialization between the two functions, favoring an organizational model with clear independence between marketing and communication. This is the case for 26.3 % of the respondents belonging to the Chemical, Pharmaceutical, and Health sector as well as for 36.0 % of the respondents belonging to the Banking, Insurance, and Financial sector. Interestingly, companies belonging to the Telecommunication and Media sector set themselves apart from the other Joint stock companies by favoring a marketing-driven model (see model 3). Finally, 43.8 % of companies belonging to the Non-profit organizations or associations point out that the communication function leads the marketing function (see model 4) [3].

[3] These results mostly confirm what has been predicted by theory. See Hutton, J.G. (1996), "Integrated Marketing Communications and the Evolution of Marketing Thought". Journal of Business Research, 37: 3, 155–162.

6. Measuring the effectiveness of communication: looking beyond output

The results indicate that 81.5 % of the respondents assess communication effectiveness through “Clippings and media response” [1]. This result is in line with that of the 2010 ECM survey [2], which also reported that this item is most often picked (82.3 %). The second highest measured activity is “Internet/intranet usage” (58.8 %). A relatively equal amount (46.4 %) of respondents monitors “Understanding of the key messages” and “Financial costs for projects”.

Measurement of communication effectiveness (%)



All these items can be grouped into five stages (levels) of evaluation: “Preparation”, “Output”, “Impact on stakeholders”, “Effect on stakeholders” and “Impact on business” [3]. Still, 70.2 % of the respondents focus on the “Output”. Less than half (46.4 %) consider their “Impact on stakeholders”, 36.9 % measure the “Effect on stakeholders” and only 28.1% focus on “Impact on business” when assessing their effectiveness of communication management.

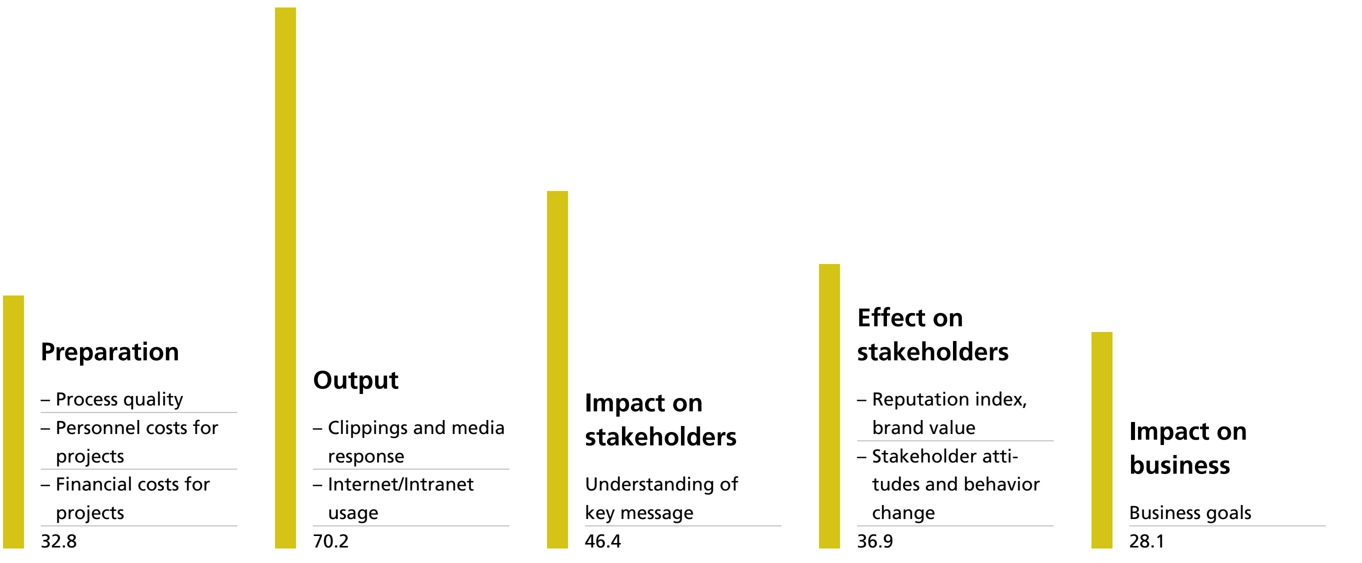
Patrick Schürmann, Managing Director, Adwired Communications AG “The Swiss Observatory clearly underscores the importance of clippings and media response as a measurement tool for PR. Yet, the survey also confirms our assumption that the Internet is increasingly gaining ground when it comes to measuring the effectiveness of communication, independent of sectors and companies. The gap between traditional media and Internet/Intranet usage is closing. We expect the focus of media monitoring to continue to shift significantly toward Internet and digital media in the years to come. The fact that communication impact is increasingly extending to the digital sphere allows PR professionals to go beyond simply measuring communication output to an ever-greater capacity to understand the opinions, attitudes and behaviors of their stakeholders.”

[1] Q 13 (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”.

[2] Zerfass, A., et al. (2010), European Communication Monitor (ECM): Q 10: Which items do you monitor or measure to assess the effectiveness of public relations/communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4–5.

[3] Cutlip, S.M., Center, A.H., Broom, G.M. (2000), Effective Public Relations. Upper Saddle River: Prentice Hall, pp. 436–452, and Lindenmann, W.K. (2001), Public Relations Research For Planning and Evaluation. University of Florida, Gainesville: The Institute for Public Relations.

Stages of evaluation (%)



Looking at the results according to type of company, Joint stock companies are more keen to measure “Effect on stakeholders” (45.8 %), whereas Private companies put less emphasis on it (29.4 %). In addition, Government-owned organizations and Political institutions look closer at the “Impact on business” (40.2 %).

By further dividing Joint stock and Private companies by sector type, it becomes evident that Telecommunications and Media (33.3 %), Banking, Insurance, and Financial (38.6 %), and Other (39.0 %) sectors are less keen to measure “Impact on stakeholders”. However, Telecommunications and Media (37.5 %) as well as Banking, Insurance, and Financial (36.4 %) sectors, along with Other services (38.5 %), are more inclined than other sectors to measure “Impact on business”.

7. Client–Agency relationship

7.1 Budget changes: relatively stable budget

More than half (52.5 %) of all respondents indicate that their external budget did not change over the last year. Also no significant budget changes are foreseen for the next three years [4].

Overall, this trend applies to companies of all types and sectors with three exceptions. Respondents from the Professional business services report an increased budget for 2009 that is 17.4 % percentage points above the average (38.5 % compared to 21.1%). In the future, 63.2 % of communication professionals in the Chemical, Pharmaceutical, and Health sector forecast an increase in budget much above the average of 39.9 %. Nonprofit organizations predict a greater decrease in budget than the majority (28.2 % vs. 18.6 %).

Regula Ruetz, ruweba kommunikation ag and President pr suisse "The survey clearly shows that companies outsource graphic and design work while keeping strategic and conceptual PR activities in house. Based on these results, it can be argued that the key task of companies' heads of communication – both today and in the future – is managing corporate positioning and image. This growing competence allows corporate communication officers to coordinate and effectively lead the contributions of external consultants and agencies called in to support them and their teams in their different capabilities. The picture is slightly different when it comes to the multimedia technology. Companies tend to have a more balanced mix between internal and external support. Internal IT specialists work together with external experts to develop technological solutions that tend to become increasingly complex."

7.2 Outsourcing: high demand for editorial, graphical, and design work

In addition to the budget trends, respondents gave information about Outsourcing and Insourcing activities [5]. Since the information was asked in the form of the means of open-ended questions, respondents could name more than one item. Overall, more Outsourcing than Insourcing items were mentioned.

In regard to Outsourcing, the most emerging topic by far is "Graphic design and Production (Print)", followed by "Corporate publishing / Editorial" work. On the other hand, companies insourced primarily "Campaigning / Public relations" activities as well as "Corporate publishing / Editorial" work and "Technical support for multimedia and Internet questions".

Outsourced activities (Counts)

Graphic design / Production (Print)	54
Corporate publishing / Editorial	50
Technical support (Web, Film)	25
Campaigning	19
Events / Fair planning	13
Translations	11
Media clippings	10
Consulting (Branding, Com.)	9
International public relations	8
Mailings	8
Fundraising	1

[4] Q 16a (asked to 4 and 5): How did your external budget change over the last year (i. e., 2009)? How do you think it will evolve in the next 3 years? Scale points: Increase(d), No change, Decrease(d).
[5] Q 16b (asked to 4 and 5): What communication activities have been allocated outside of your organization (outsourced)? What communication activities used to be performed outside that you returned in-house (insourcing)? (An open-ended question.)

Insourced activities (Counts)

Campaigning/Public relations	20
Corporate publishing/Editorial	19
Technical support (MM, Internet)	18
Graphic design	11
Consulting/Strategic conception	10
Events/Fair planning	7
Media clippings	6
Public affairs	2

7.3 Companies value fixed project fee

Most companies pay public relations firms with a "Fixed project fee" [6]. Almost 60 % prefer this method of payment. No significant changes are foreseen in the future.

Fee schemes (%)

Fixed project fee	58.3
Hourly fee	31.1
Flat rate	27.2
Retainer	10.7
Fee with performance clause	3.9

7.4 Reasons for working with communication consultancies: mismatched perceptions among agencies and companies

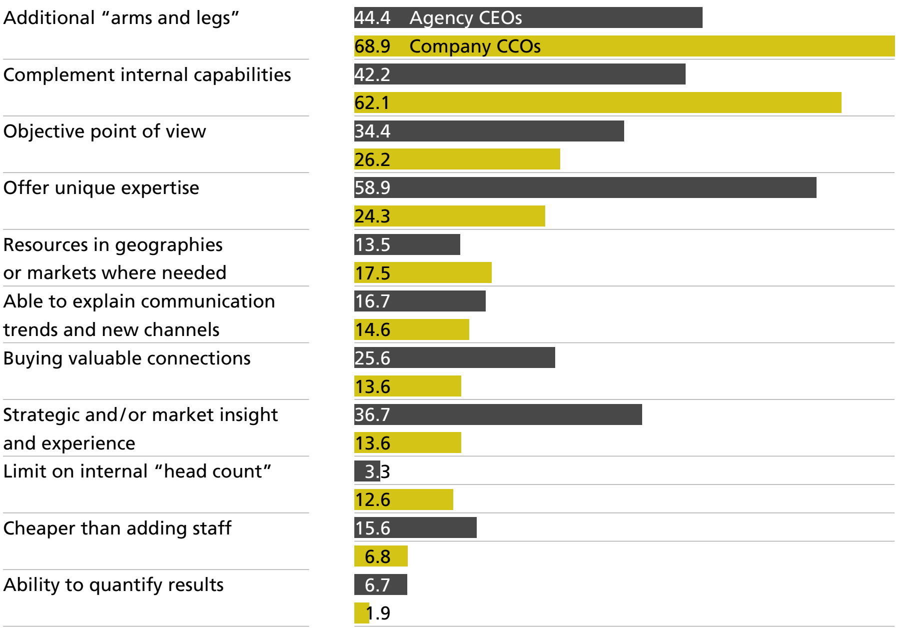
A remarkable difference exists between why CCOs work with agencies and why agencies believe companies contract them. In particular, agency CEOs rate their strategic contribution higher than what is perceived by company CCOs – ("Strategic and/or market insight and experience" (36.7 % vs. 13.6 %) and "Offer unique expertise" (58.9 % vs. 24.3 %)) – while company CCOs rate the operational contribution of agencies higher than what agency CEOs perceive ("Additional arms and legs" (68.9 % vs. 44.4 %) "Complement internal capabilities" (62.1 % vs. 42.2 %)) [7].

Roman Geiser, Chief Operating Officer EMEA and Chairman Switzerland, Burson-Marsteller and President BPRA "The survey provides valuable data regarding the relationship between companies and PR consultancies. It shows that companies are highly satisfied with the services agencies provide. In particular, clients perceive consulting firms as honest and fair, creative, and providers of high-quality services. One finding which should be put into perspective is Corporate Communication Officers believe that consultants do not contribute strategically. In fact, today strategic communication consulting is often delivered not only to CCOs, but also directly to the CEOs, the chairman offices, or other functions (e.g. public affairs, HR, or marketing and communication). Finally, the fact that CCOs value agencies' ability to provide additional "arms and legs", complement internal capabilities, and ensure objective points of view stands as proof of the effective cooperation between companies' communication professionals and consulting firms."

[6] Q 17a (asked to 4): Which fee schemes are you using to pay public relations firms today? Response items: Retainer, Flat rate, Hourly fee, Project fee, Fee with performance clause.
Q 17b (asked to 4): How are these fee schemes going to evolve in your practice in the next 3 years? Scale points: Decrease, Stay the same, Increase. For the possible response options (schemes), see the chart "Fee schemes".

[7] Q14 (asked to 1 and 4): (Company) 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".

Reasons for working with agencies and consultants (%)



At the European level (ECM 2008), companies seem to appreciate the strategic contribution of agencies more: 41.4 % (compared to 13.6 % in Switzerland) rank "Strategic and / or market insight and experience" as the second most common reason for working with agencies [8]. "Additional 'arms and legs'" (62.2 %) ranks first while "Complement our internal capabilities" (39.8 %) ranks third.

The findings of the current Swiss survey mirror to a certain extent 2009 US data [9]. In the US data, respondents ranked "Additional 'arms and legs'" as the single most popular reason for working with agencies. "Complement our internal capabilities" ranked second. However, "Strategic and / or market insight" and "Offer unique expertise" ranked third and fourth placing them in a higher position than in Switzerland.

When comparing respondents according to their base in Switzerland, Swiss French agencies see themselves as being more strategic than Swiss German ones do. In fact, agency CEOs from the Swiss French part mention "Strategic and / or market insights and experience" twice as often as respondents from the Swiss German part (69.6 % vs. 31.4 %). An opposite result occurs in operational capabilities items: "Additional 'arms and legs'" is mentioned by 48.6 % of the Swiss German agencies but only 26.1 % of the Swiss French agencies. The same pattern

[8] Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven P. (2008), European Communication Monitor (ECM): Q 4: Describe your reasons for working with outside agencies and communication consultants. Identify all factors that apply.

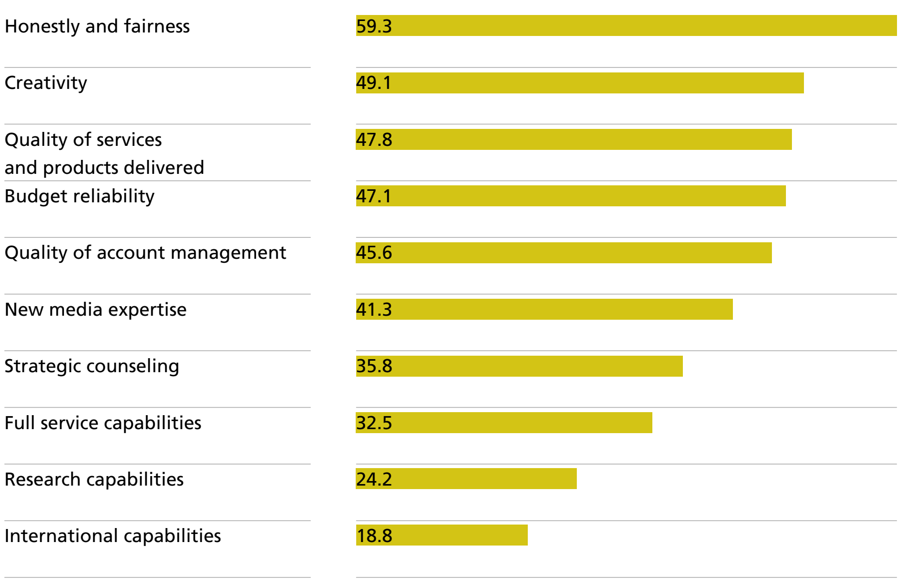
[9] Swerling, J., Sen, C., Bonefeste, A., Rezvan, A., Lee, D., & McHargue, A. (2010), Communications and Public Relations General Accepted Practices 2010 (G.A.P.): Q 27: Describe your reasons for working with agencies by checking all of the following factors that apply. Response items: They provide an objective point of view, They provide strategic and / or market insight and experience, They provide additional "arms and legs", They provide an ability to quantify results, They complement our internal capabilities, They are cheaper than adding staff, We have a limit on internal "head count", They offer unique expertise, They have resources in geographies or markets where I need them, They provide expertise in digital / social media that we lack internally.

occurs for “Complement companies’ internal capabilities”: this reason is mentioned by 43.8 % of the Swiss German agency CEOs but only 21.7 % of the Swiss French agency CEOs.

7.5 Honesty and fairness top the ranking of most appreciated agency qualities

Companies are highly satisfied with the “Honesty and fairness” of the agencies (59.3 %). Companies also appreciate agencies’ “Creativity” (49.1%), “Quality of services and products delivered” (47.8 %), “Budget reliability” (47.1%), and “Quality of account management” (45.6 %) [10].

Satisfaction with agencies and consultants (%)



“Research capabilities” ranks second to last (24.2 %), while agencies’ and consultants’ “International capabilities” received the lowest score for satisfaction (18.8 %). This particularly low result seems to vary according to the professionals’ reach of activity. Respondents from companies that operate worldwide appear to be more satisfied with this criterion (48.3 %) than their colleagues working primarily in Europe (17.2 %) [11].

[10] Q 15 (asked to 4 and 5): How satisfied are you with public relations agencies and communication consultants? (1 = not at all, 5 = very much; I don’t know) Scale points considered 4–5.

[11] Respondents working mainly locally and in Switzerland also show a low level of satisfaction concerning the international capability of agencies (13.8 % and 20.7 %, respectively). However, this result may be considered unreliable (although statistically significant) considering the probable low level of international experience of the respondents.

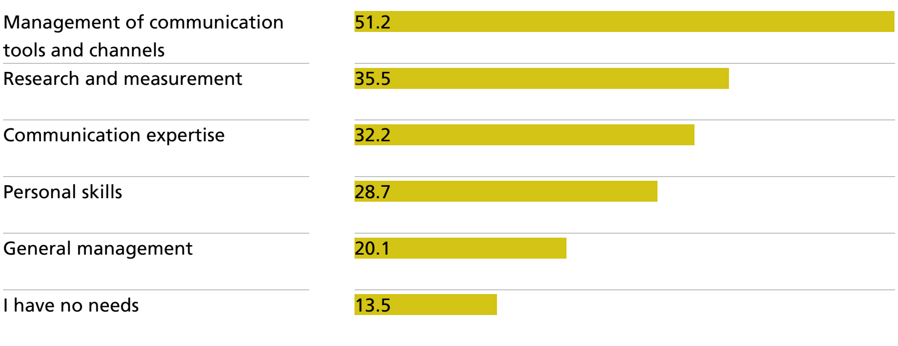
8. Professional development

Marion Starck, President SPRI "Despite the growing strategic challenges of communication and reputation management in an increasingly complex world, the Observatory results surprisingly show the greatest need for training in the management of communication instruments and channels. In addition to wanting to deepen their expertise in disciplines that have not yet become an exact science, such as CSR, PR professionals find their time dominated by the need to fill a constantly growing demand for information. For educational institutions, this represents a challenge to respond quickly to developing trends and find the right balance between theoretical knowledge and the transmission of practical know-how. Against the background of a rapidly changing landscape with the increasing use of social media and rising concerns about business ethics, communication skills must be further strengthened to equip companies to conduct honest, dynamic, and convincing dialogues with their stakeholders."

8.1 Communication professionals have clearly articulated expertise needs

In general, respondents seem to have quite specific expertise needs. Most select only one or two areas of needs, with "Management of communication tools and channels" being selected by 51.2 % of the respondents. 13.5 % of respondents signal that they do not have any needs [1].

Needs in areas of expertise (%)



A person's educational level generally seems not to influence expertise needs. The only exception emerges among respondents who have No educational qualification. This group indicates a higher-than-average need for "Communication expertise" (58.3 %) and "Management of communication tools and channels" (83.3 %). Furthermore, no significant differences occur among respondents according to the type of company or sector in which they operate.

Yet some differences emerge when looking at respondents' reach of professional activities. Although these differences are not big, they are significant and refer in particular to the differences between respondents operating at a Regional level and those working Worldwide. "Management of communication tools and channels" is a bigger topic for regionally active professionals than for those operating Worldwide (50.9 % vs. 44.8 %). On the contrary, respondents from companies with Worldwide reach want to gain more knowledge than their regional colleagues in areas such as "Research and measurement" (42.4 % vs. 32.9 %), "Communication expertise" (34.4 % vs. 29.5 %), and "General management" (24.8 % vs. 17.9 %).

[1] Q 18 (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".

When respondents specify their needs within the five expertise areas [2], they mention clearly defined needs. In Communication expertise, respondents seek "CSR", "Link between strategy and communication" and "Branding". In Management of communication tools and activities, most respondents named "Online media/digital communication". In General management, "Financial management and budgeting" is most common whereas for Research and measurement "Evaluation methods" rank first. Finally, in the area of Personal skills, "Leadership" and "Coaching" are the most mentioned needs.

Needs in Communication expertise (Counts)

CSR	43
Link between strategy and communication	42
Branding	41
Reputation management	28
Internal communication	7
Public affairs	5
Social media/Internet	5
Targeting	4
Crisis and issue management	4
CEO Positioning/Communication	4
Sponsoring	4

[2] 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.

Martin Zahner, Managing Partner, YJOO Communications AG and Board Member BPRA and SPRI "More enabling, less doing. The management of tools is one thing, but the ability of professionals to take on the role of a coach who enables people in their companies to cope with communication challenges will be much more important. The traditional internal and external communication linear planning will be replaced by a continuous dialog process, which has to be managed according to the situation. This requires a deep understanding of company values as well as a high level of social and professional expertise."

Needs in Management of communication tools and channels (Counts)

Online media/ Digital communication	146
Change and crisis communication	43
Internal/HR communication	29
Social media	25
Financial communication/ Investor relations	17
Cross-media	13
Stakeholder communication	6
Corporate publishing	6

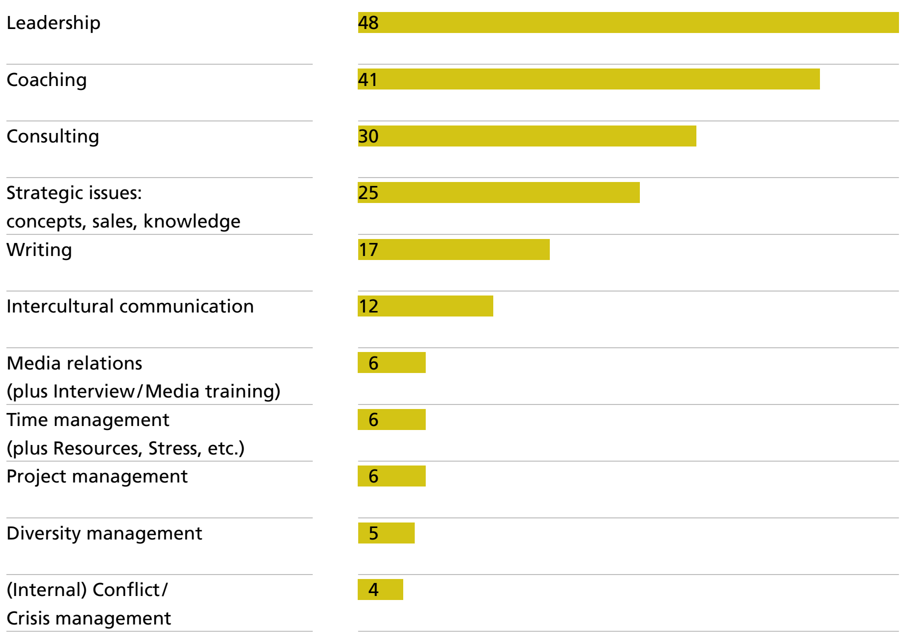
Needs in General management (Counts)

Financial management/Budgeting	28
Resource allocation	15
Client/Agency management	15
(Communication) Law	13
Management by objectives	11
Leadership	9
Project management	9
HR topics	6

Needs in Research and measurement (Counts)

Evaluation methods	90
Controlling	59
Efficiency in monitoring/ Measurement	31
Value creation for customers (price, quality, ROI, etc.)	9
Trends	6

Needs in Personal skills (Counts)



8.2 Respondents expect practical knowledge benefit from short courses and theoretical knowledge from long programs

For Workshops and seminars, “Practical knowledge” is the main benefit respondents consider (34.9 % ranked it first). [3] For Certificate courses, “Theoretical and conceptual knowledge” (30.2 %) and “Practical knowledge” (30.4 %) are equally ranked as the most considered. For Diploma courses, “Theoretical and conceptual knowledge” rank as the most important benefit (40.4 %).

Expected educational benefits (%)

	Theoretical and conceptual knowledge	Practical knowledge	Understanding trends influencing CC and PR (environmental factors)	Access to high-quality network of professionals
Workshops and seminars	#4 16.4	#1 34.9	#2 28.7	#3 20.1
Certificate courses	#1 30.2	#1 30.4	#3 25.0	#4 14.4
Diploma courses	#1 40.4	#2 27.9	#3 18.3	#4 13.5

No significant differences arise between respondents based on their educational profile except for those who have No educational qualification, who more often look to “Understand trends than others” (41.7 % vs. an average 18.3 %).

[3] Q 19 (asked to all): Think about your expectations regarding training programs. Please rank the following benefits you would be looking at when considering “Workshops and seminars” / ”Certificate courses” / ”Diploma courses” (1 = most considered; 4 = least considered). Response items: Theoretical and conceptual knowledge, Practical knowledge, Understanding trends influencing corporate communication and public relations (environmental factors), Access to high-quality network of professionals.

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