

Public relations in Austria 2015 – An international benchmark



Key facts

Empirical study on the status and perspectives of public relations in Austria

- Country-specific insights based on the most comprehensive comparative study of public relations worldwide among communication professionals in 41 European countries
- Research project conducted by a group of professors from renowned universities, led by Prof. Dr. Ansgar Zerfass, University of Leipzig / BI Norwegian Business School Oslo
- Organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD); supported by Communication Director magazine and PRIME Research
- Supported by PRVA Public Relations Verband Austria
- Based on an international / national sample of 2.253 / 85 communication professionals
- Respondents in Austria: 60.0% work in PR for more than 10 years; average age 42 years; 65.9% work in communication departments; 34.1% in agencies; 58.8% PRVA members
- Full research report with cross-European data available at www.communicationmonitor.eu

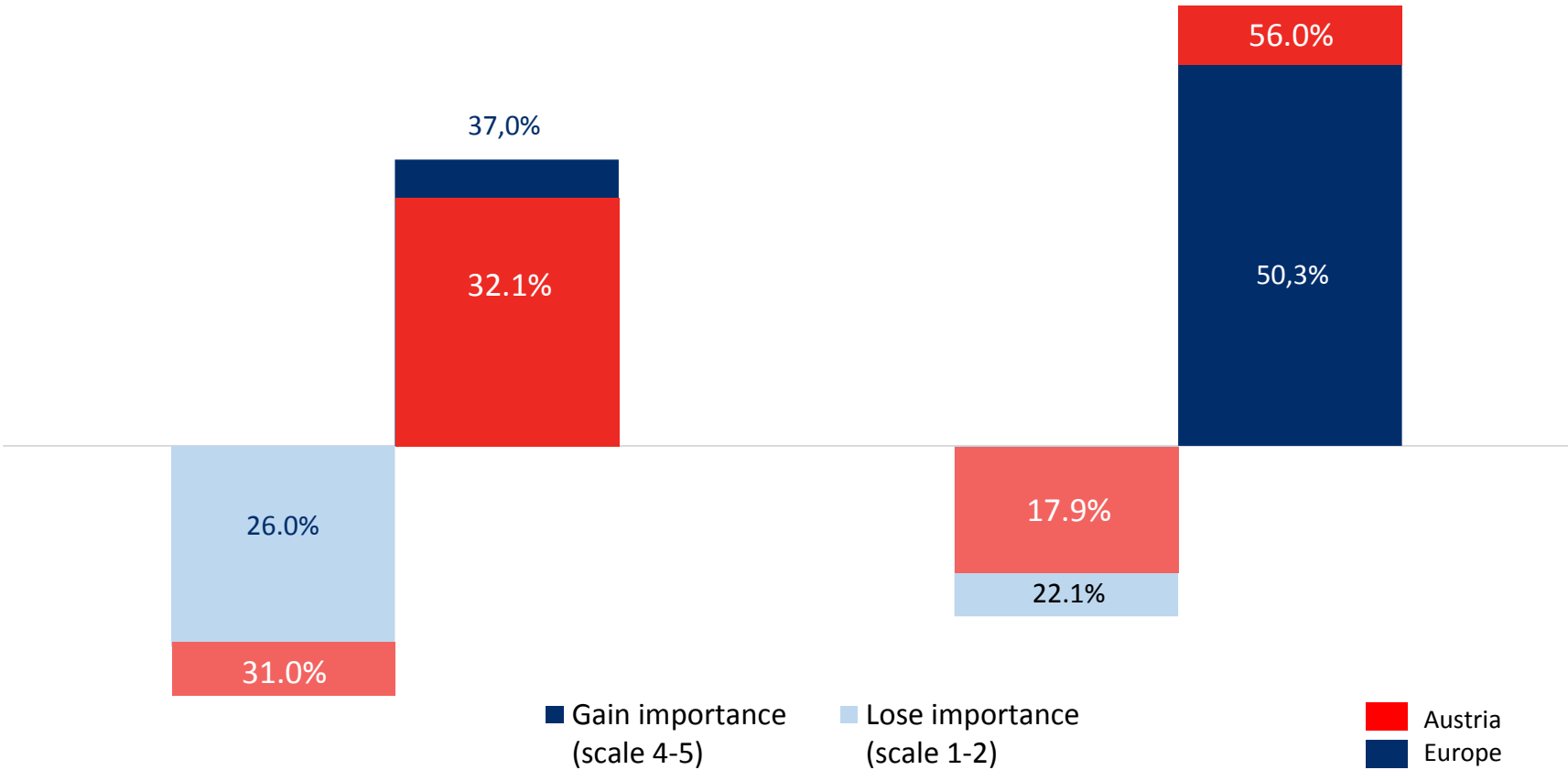
Future relevance of mass media



Future relevance of mass media: Austrian communication professionals are more sceptical than their peers across Europe

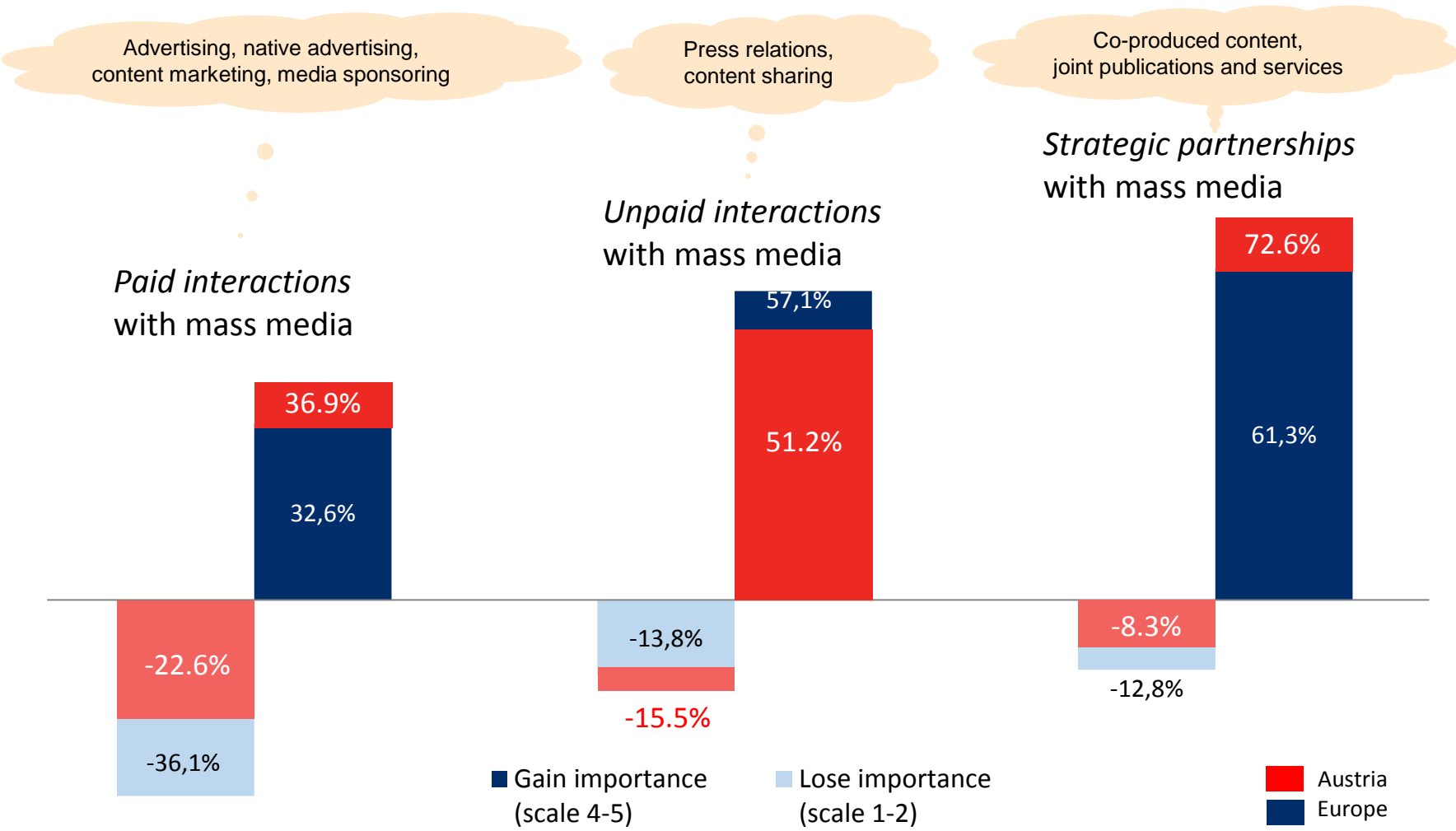
Using *mass media* for shaping public opinion

Using *owned media* for shaping public opinion



www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 2,232 European PR professionals; 84 Austrian PR professionals. Q 1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance).

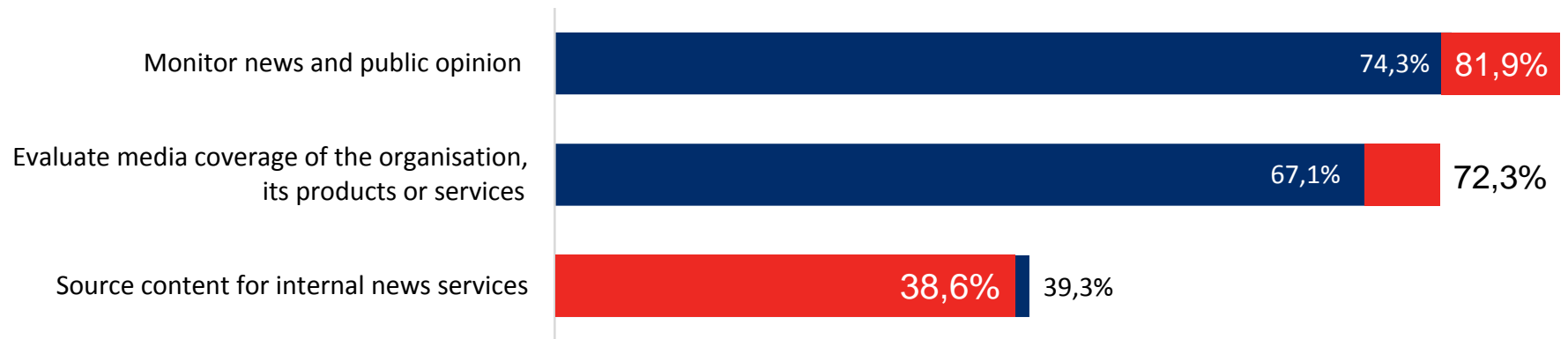
Collaboration between communication professionals and mass media: Strategic partnerships and unpaid interactions will be more important



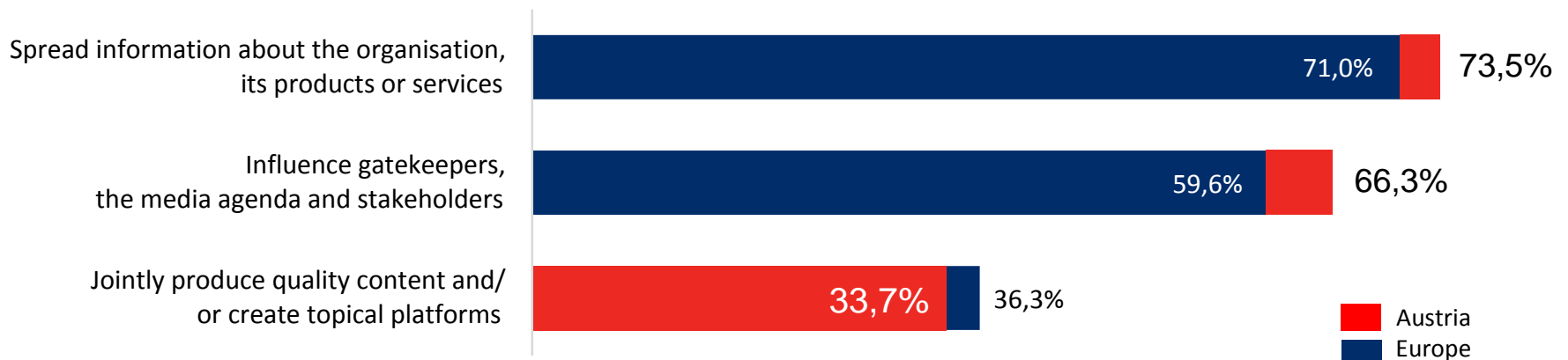
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 2,232 European PR professionals / n = 84 Austrian PR professionals. Q 1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance).

Rationales for working with the media today in organisational communication

Interaction with mass media for internal reasons

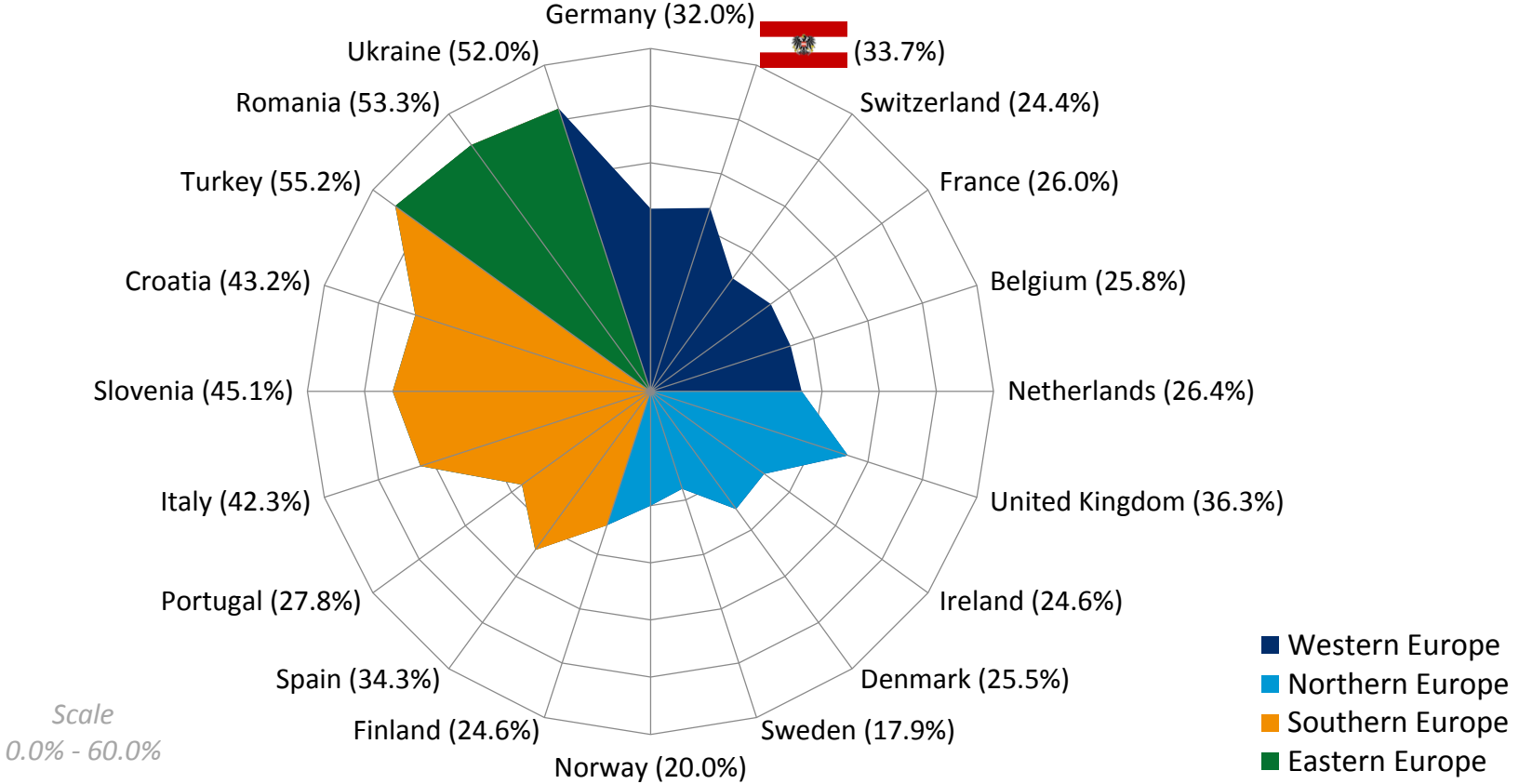


Interaction with mass media to reach the public sphere



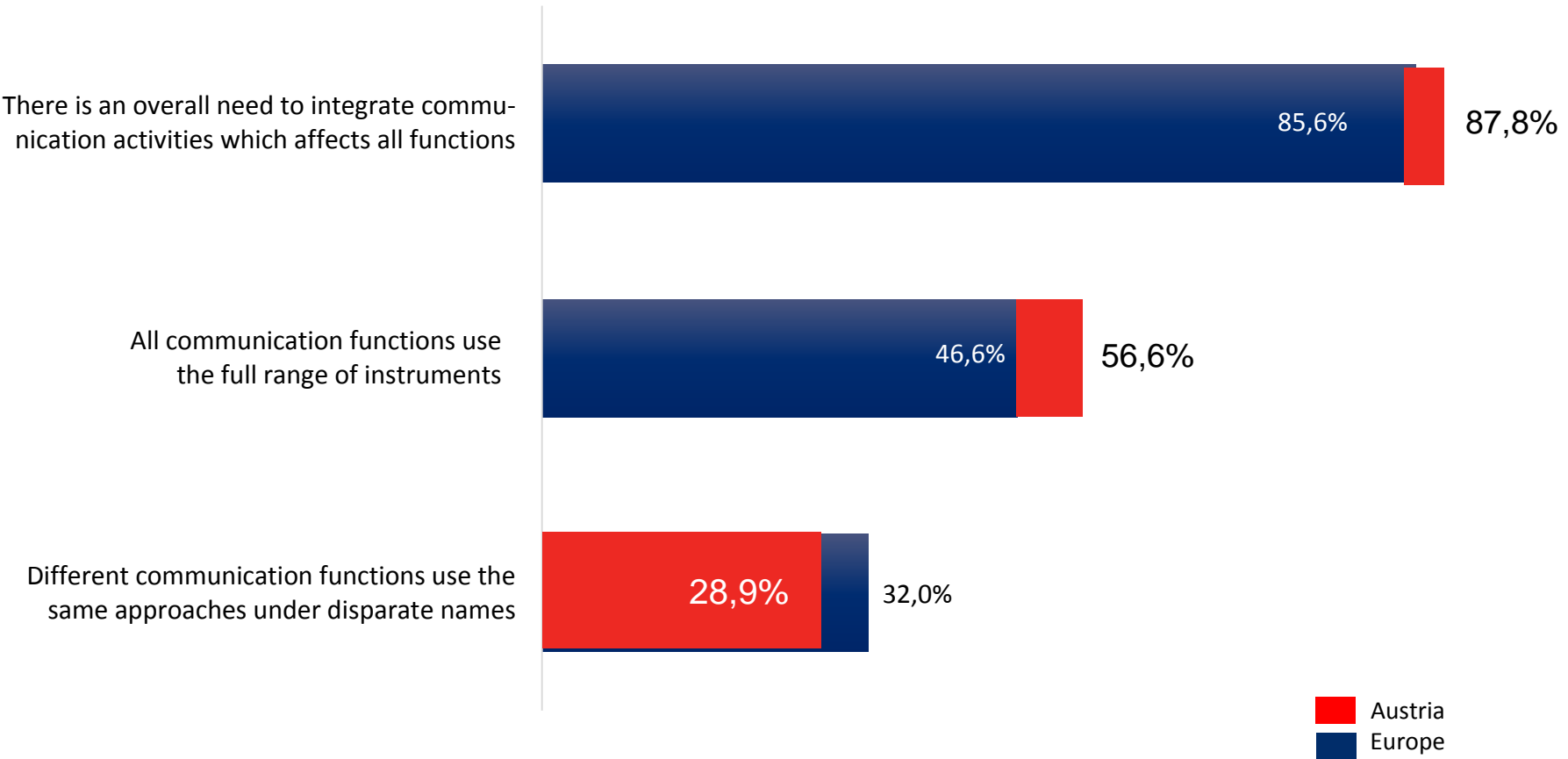
Co-producing content and platforms with mass media is more prevalent in Eastern and Southern Europe

Frequent jointly produce quality content and/or create topical platforms



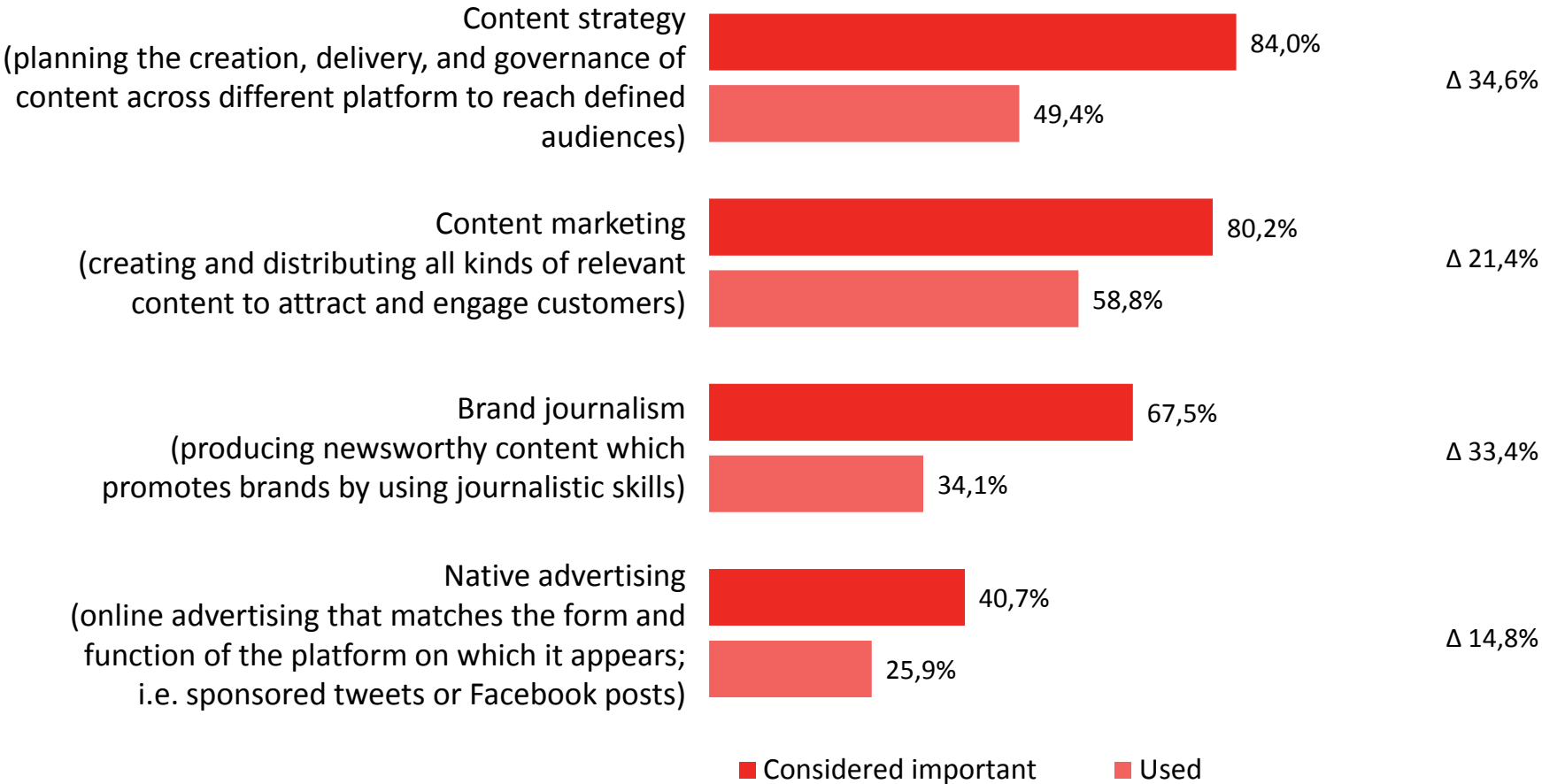
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,237 European PR professionals / n = 83 Austrian PR professionals. Q 2: Why does your organisation interact with the mass media? (Agencies/consultants: Think of your own organisation, not of your clients). My organisation (or our service providers) use mass media and their products to ... Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

Strong need to integrate communication activities as many instruments are used by different functions



www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 2,212 European PR professionals / n^{min} = 81 Austrian PR professionals. Q 3: New communication practices might affect the division of work and importance of different communication functions like corporate communications / public relations and marketing. Please state whether you see these trends happening in your organisation or at your clients: Scale 1 (Not at all) – 5 (Very strong). Percentages: Relevance based on scale points 4-5.

Practices of content management and delivery: large gaps between perceived importance and actual use

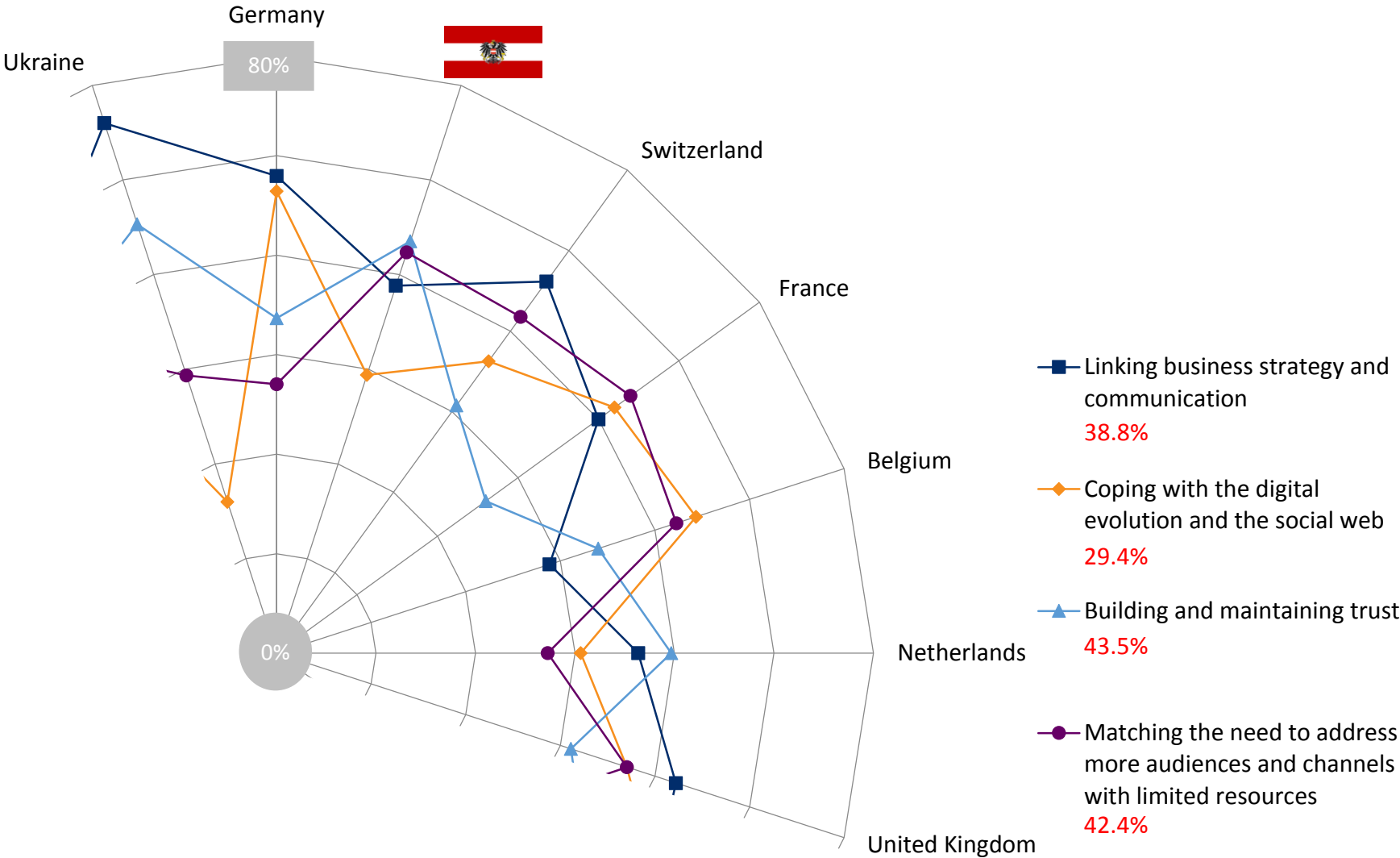


www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 89 Austrian PR professionals. Q 4: To what extent are the following concepts and practices important for the future of strategic communication in general? Scale 1 (Not at all important)– 5 (Extremely important). Percentages: Important based on scale points 4-5. And what is used or offered by your organisation? (Tick "Used by my organisation")

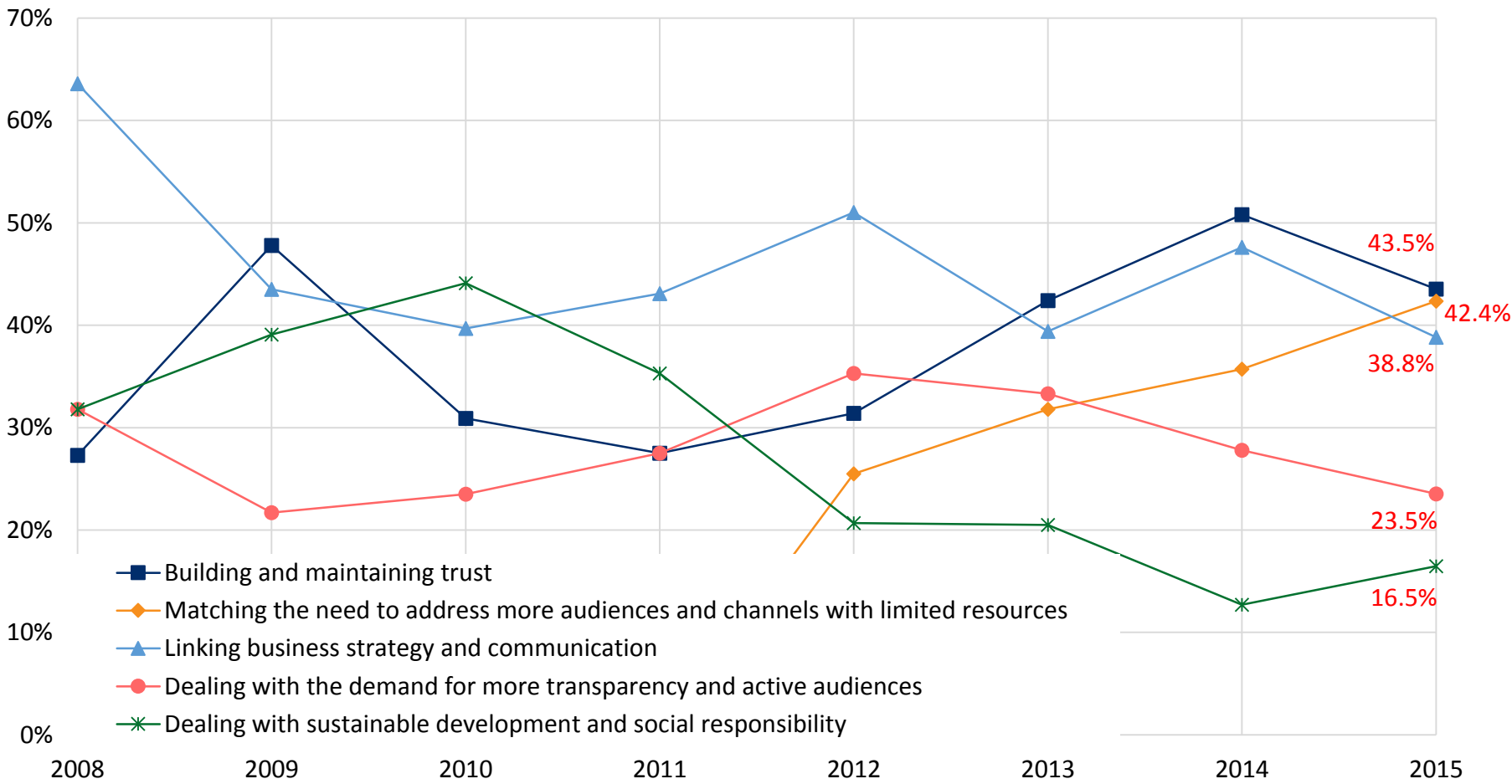
Strategic issues



“Building and maintaining trust” as well as “matching the need to address more audiences and channels with limited resources” are key issues in Austria



Top five issues for communication management in Austria since 2008

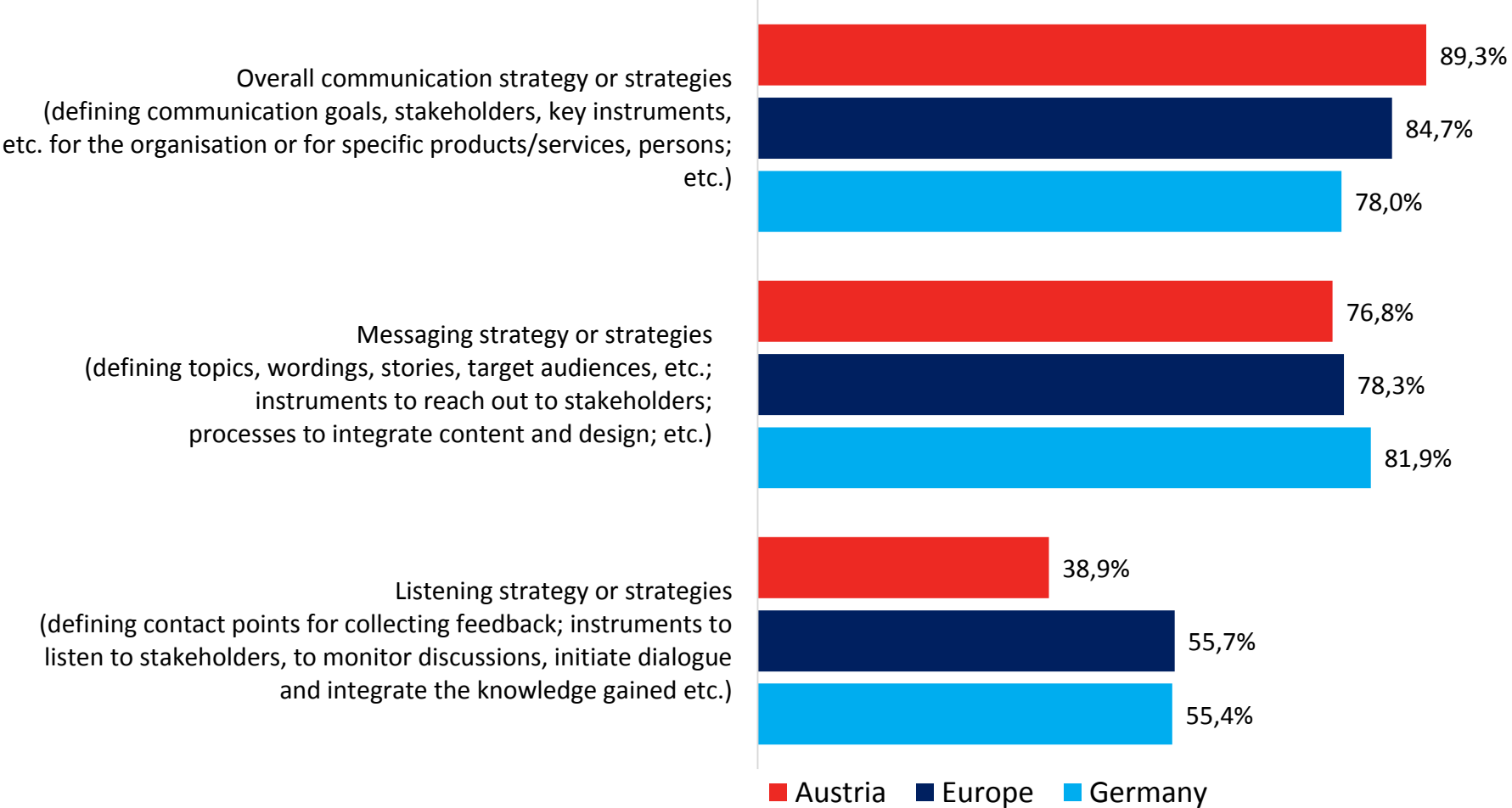


www.communicationmonitor.eu / Zerfass et al. 2015 / n = 85 Austrian PR professionals; Q16. Zerfass et al. 2014 / n = 126; Q6. Zerfass et al. 2013 / n = 132; Q9. Zerfass et al. 2012 / n = 51; Q12. Zerfass et al. 2011 / n = 51; Q7. Zerfass et al. 2010 / n = 68; Q 12. Zerfass et al. 2009 / n = 69; Q6. Zerfass et al. 2008 / n = 22. Q 5: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Communication strategies and organisational listening

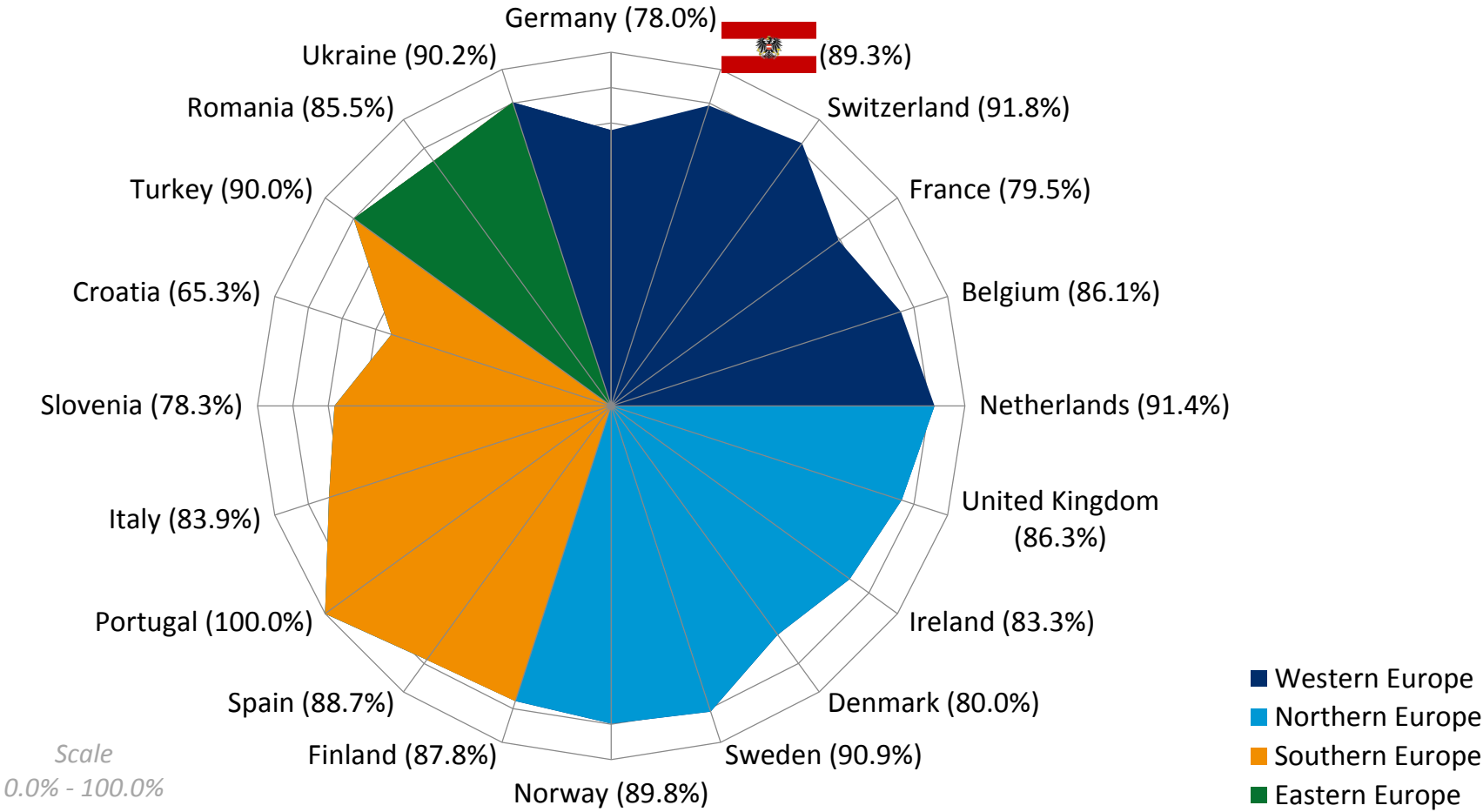


Communication strategies implemented by communication departments: Plans and messaging are prevalent, listening is very often neglected



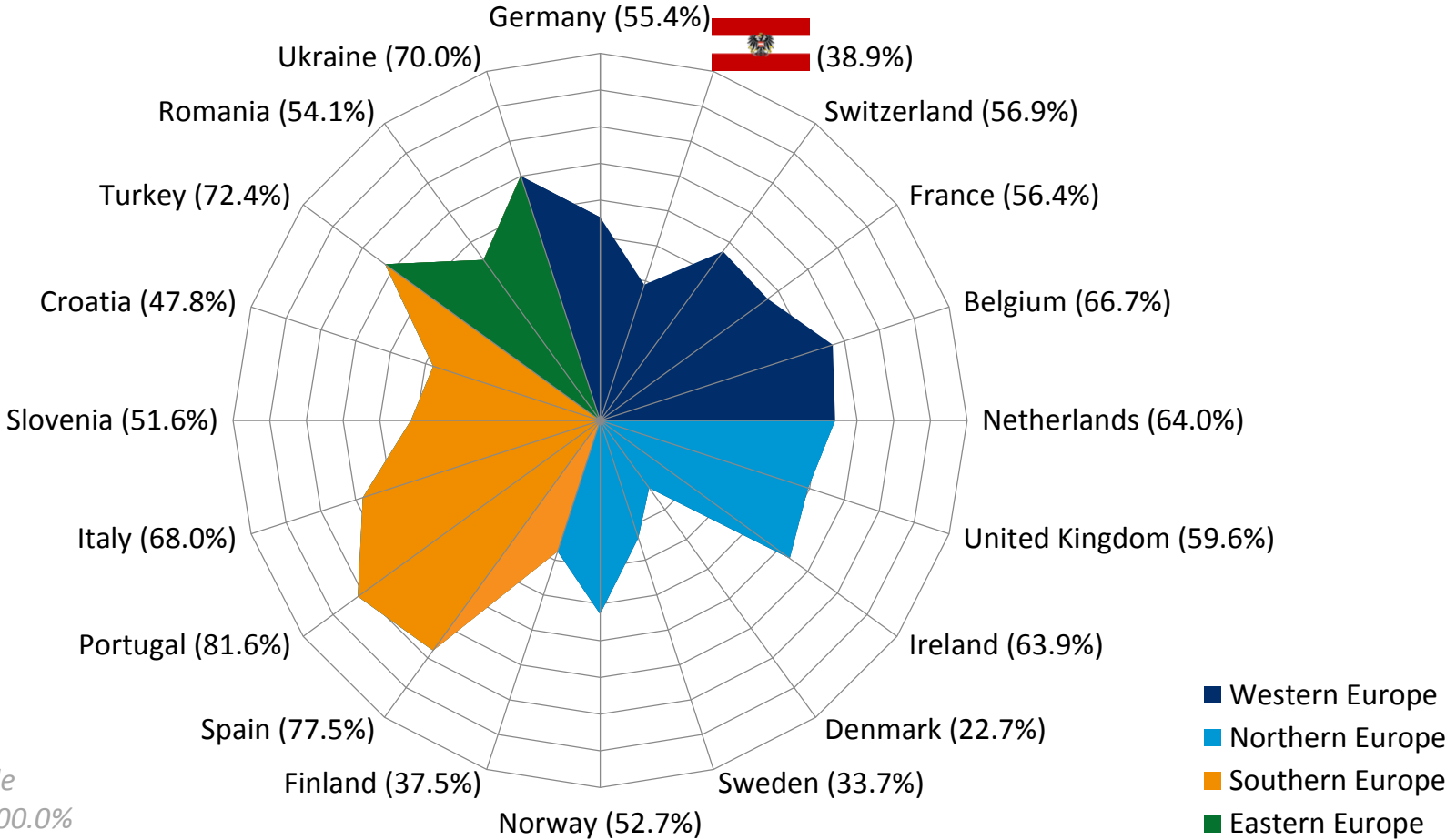
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,487 European / 54 Austrian / 121 German PR professionals in communication departments.
Q 8: Does your organisation have one or more of the following strategies? Scale 1 (Yes) – 2 (No) – 3 (Don't know). Percentages: Based on agreement to items.

Country-to-country analysis: Austrian organisations are good in implementing overall communication strategies



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,330 PR professionals from 20 countries in communication departments. Q 8: Does your organisation have one or more of the following strategies? Item: Overall communication strategy or strategies (defining communication goals, stakeholders, key instruments, etc. for the organisation or for specific products/services, persons; etc.). Percentages: Based on agreement.

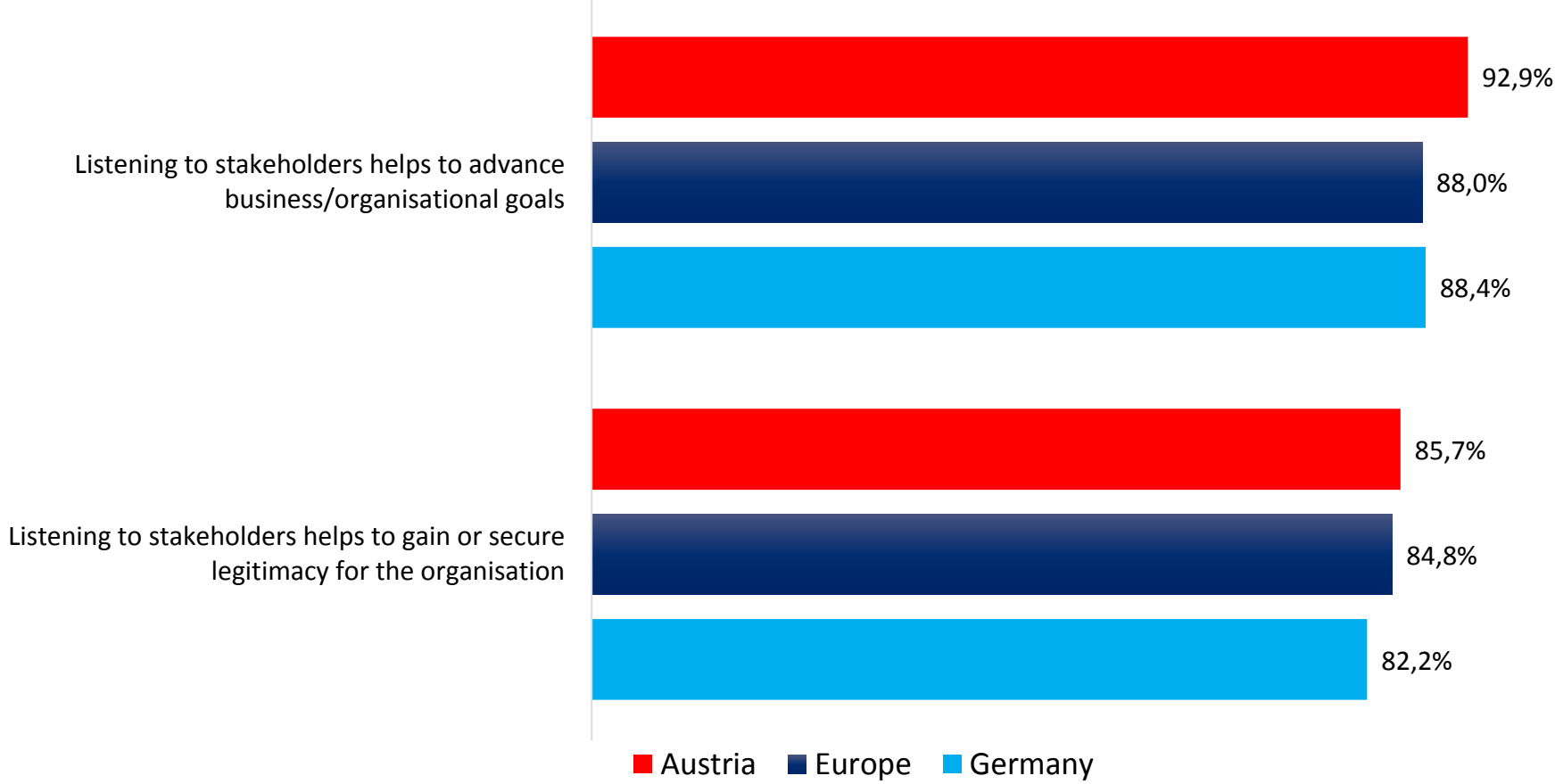
Country-to-country analysis: Austrian organisations are lagging behind in the field of listening strategies



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,276 PR professionals from 20 countries working communication departments. Q 8: Does your organisation have one or more of the following strategies? Item: Listening strategy or strategies (defining contact points for collecting feedback; instruments to listen to stakeholders, to monitor discussions, initiate dialogue and integrate the knowledge gained; etc.). Percentages: Based on agreement to each item. Highly significant differences (chi-square test, p ≤ 0.01).

Organisational listening: communication professionals see major benefits both for advancing business goals and securing legitimacy

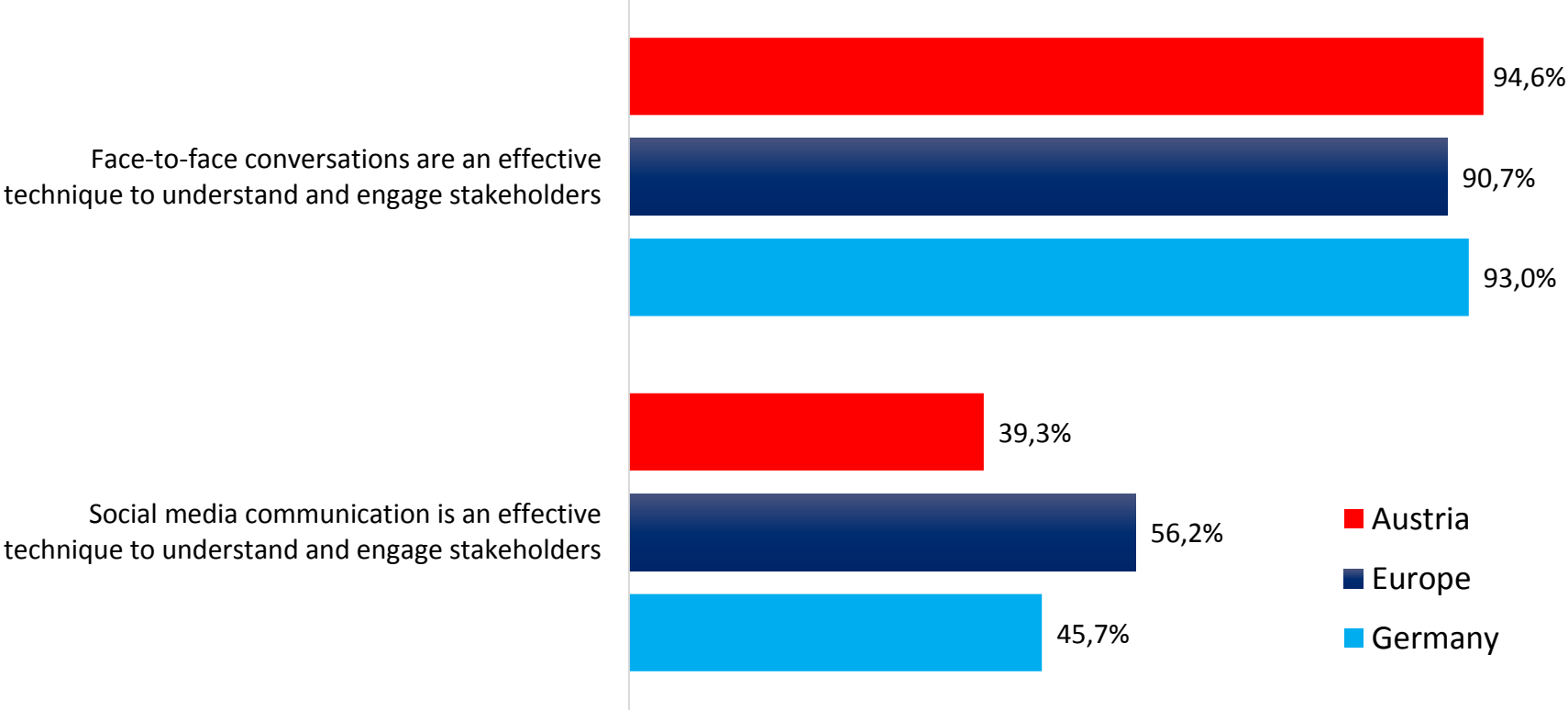
Objectives of organisational listening



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 European / 56 Austrian / 129 German PR professionals in communication departments.
Q 11: Please state whether you agree or disagree with these statements. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Agreement based on scale points 4-5.

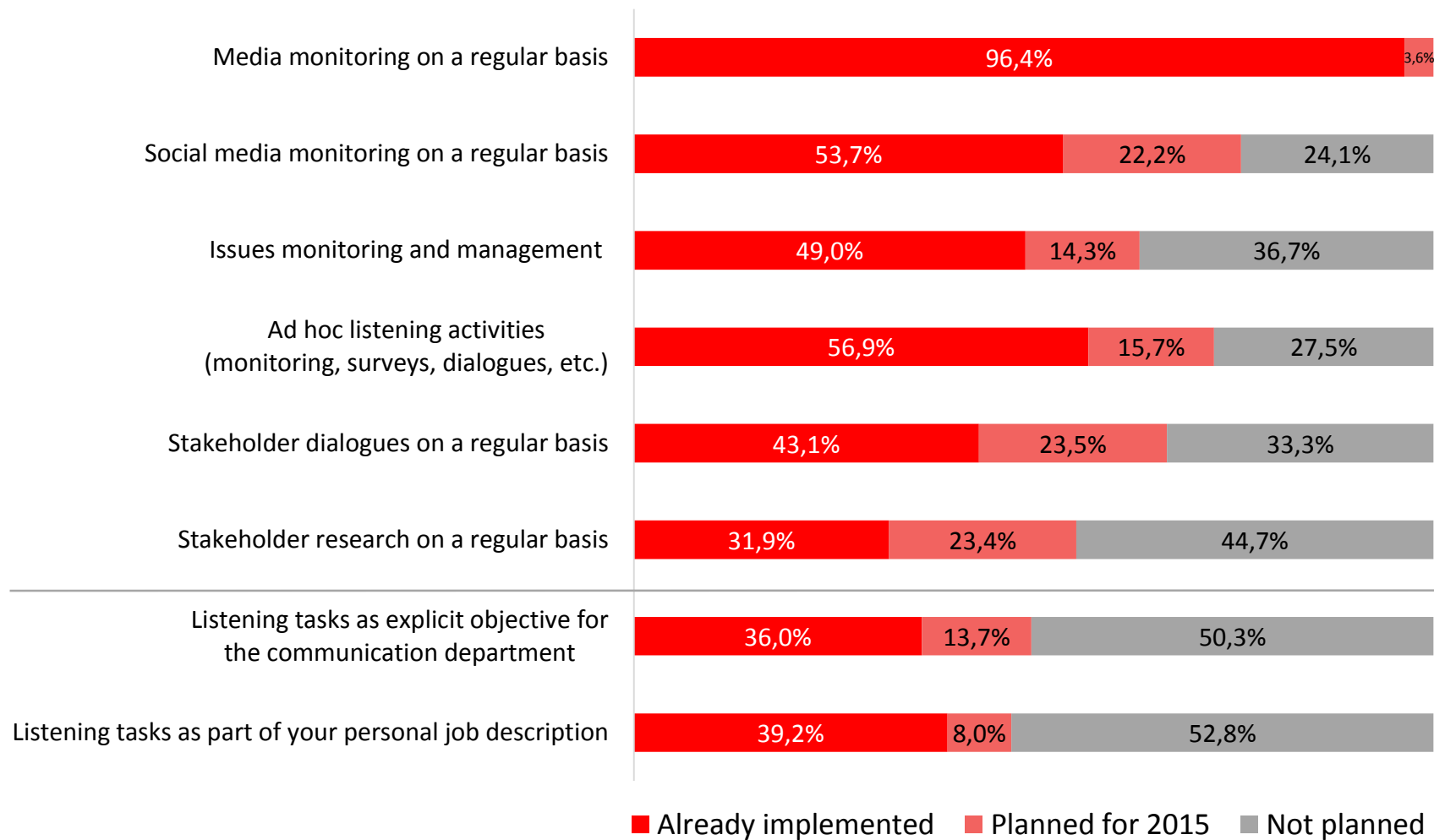
Engaging stakeholders through organisational listening: face-to-face communication is favoured; social media is rated less effective

Means of organisational listening

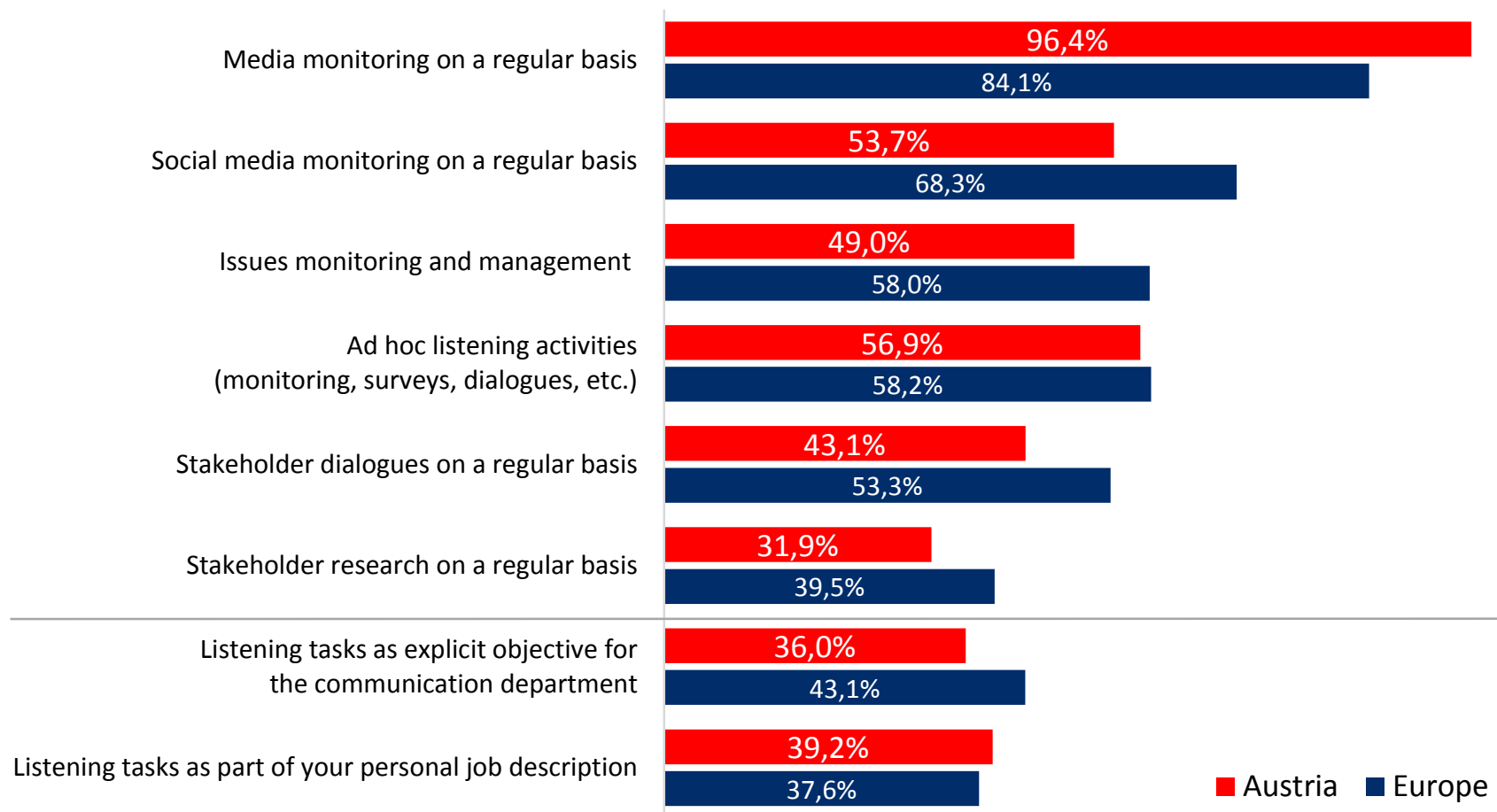


www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 European / 56 Austrian / 129 German PR professionals in communication departments.
Q 11: Please state whether you agree or disagree with these statements. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Agreement based on scale points 4-5.

Structures and techniques for organisational listening in Austria: Traditional instruments are prevailing, responsibilities are not always assigned



Structures and techniques for organisational listening already implemented: Traditional instruments are prevailing, responsibilities are not always assigned



Country-to-country analysis: structures and techniques for organisational listening implemented in communication departments

	Listening tasks as part of your personal job description	Listening tasks as explicit objective for the communication department **	Media monitoring on a regular basis	Social media monitoring on a regular basis	Stakeholder research on a regular basis **	Stakeholder dialogues on a regular basis **	Issues monitoring and management	Ad hoc listening activities *
Germany	32.5%	39.2%	90.6%	72.2%	37.5%	49.1%	64.1%	62.2%
Austria	39.2%	36.0%	96.4%	53.7%	31.9%	43.1%	49.0%	56.9%
Switzerland	38.8%	46.3%	89.3%	56.9%	31.9%	58.0%	66.2%	68.7%
France	38.2%	30.3%	80.6%	61.5%	28.1%	44.1%	61.8%	55.6%
Belgium	53.4%	44.1%	80.6%	76.7%	38.8%	59.7%	53.7%	57.1%
Netherlands	45.9%	34.8%	88.0%	80.4%	54.0%	55.1%	65.2%	72.2%
United Kingdom	47.2%	40.2%	90.7%	82.5%	48.9%	62.6%	64.8%	60.2%
Ireland	34.3%	26.5%	77.8%	66.7%	33.3%	62.9%	71.4%	41.7%
Denmark	15.9%	14.6%	80.0%	57.8%	22.0%	56.1%	43.9%	56.8%
Sweden	33.0%	23.0%	85.0%	71.1%	42.9%	58.1%	50.0%	57.4%

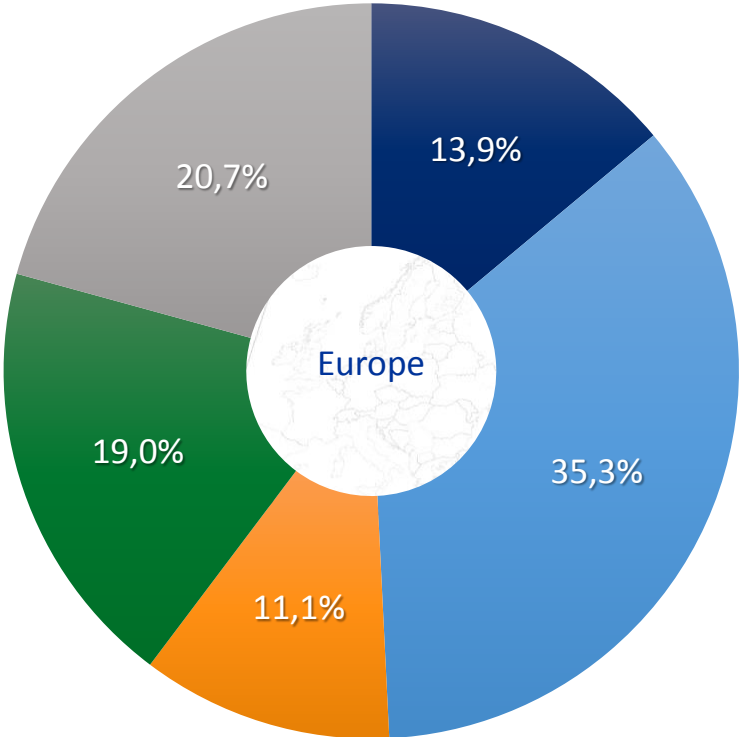
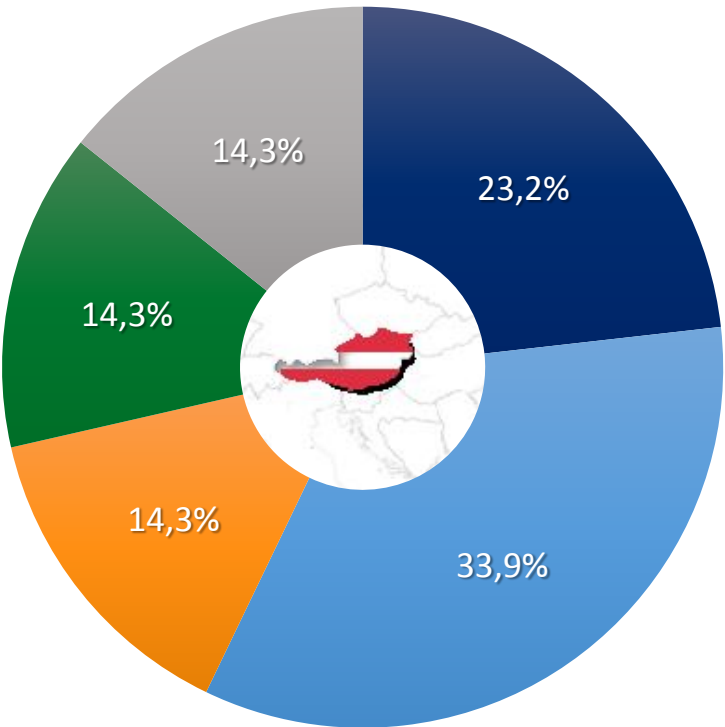
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,203 PR professionals from 20 countries working in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item.

** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Relationship between agencies and clients



Austrian communication departments work more often with a single "agency of record", compared to their European colleagues

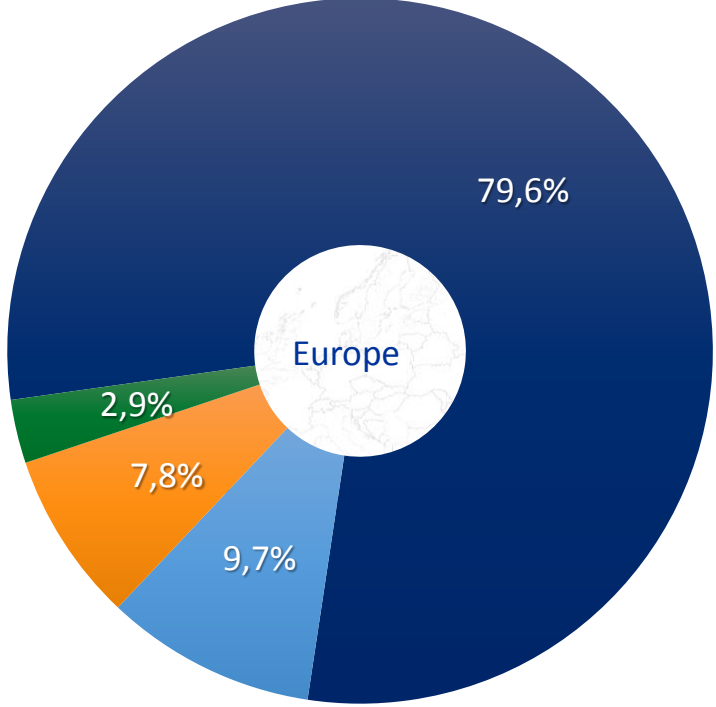
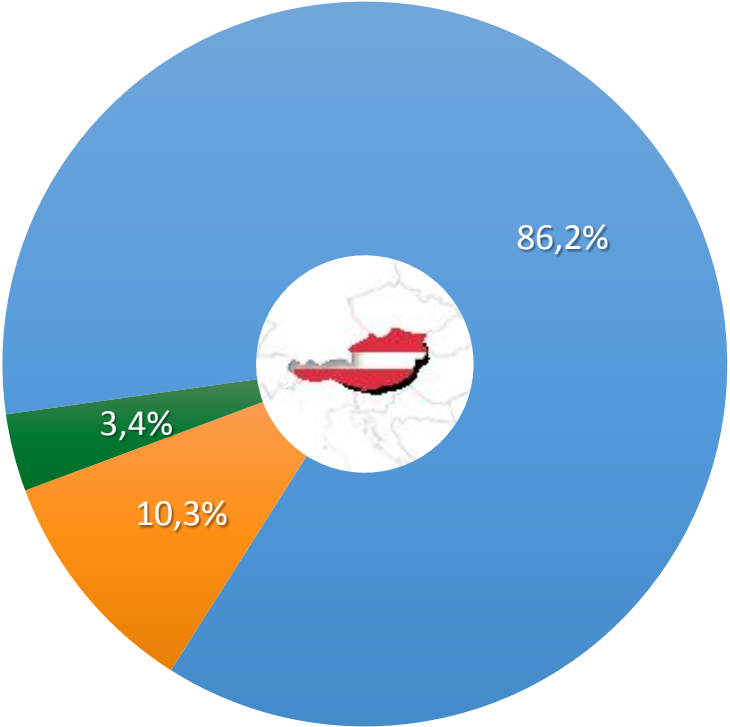


- We work on an ongoing basis with a single "agency of record"
- We work on an ongoing basis with multiple agencies
- We assign projects to a pre-approved list of firms
- We assign projects to agencies on an ad hoc basis
- We do not work with outside agencies

Nature of agency relationships in different European countries

	We work on an ongoing basis with a single "agency of record"	We work on an ongoing basis with multiple agencies	We assign projects to a pre-approved list of firms	We assign projects to agencies on an ad hoc basis	We do not work with outside agencies
Germany	8.5%	57.4%	12.4%	13.2%	8.5%
Austria	23.2%	33.9%	14.3%	14.3%	14.3%
Switzerland	9.3%	53.3%	6.7%	25.3%	5.3%
France	7.5%	45.0%	7.5%	20.0%	20.0%
Belgium	9.6%	26.0%	12.3%	24.7%	27.4%
Netherlands	9.6%	40.4%	18.1%	24.5%	7.4%
United Kingdom	5.1%	30.3%	16.2%	29.3%	19.2%
Ireland	13.5%	40.5%	13.5%	16.2%	16.2%
Denmark	8.7%	34.8%	2.2%	39.1%	15.2%
Sweden	10.9%	38.6%	26.7%	8.9%	14.9%

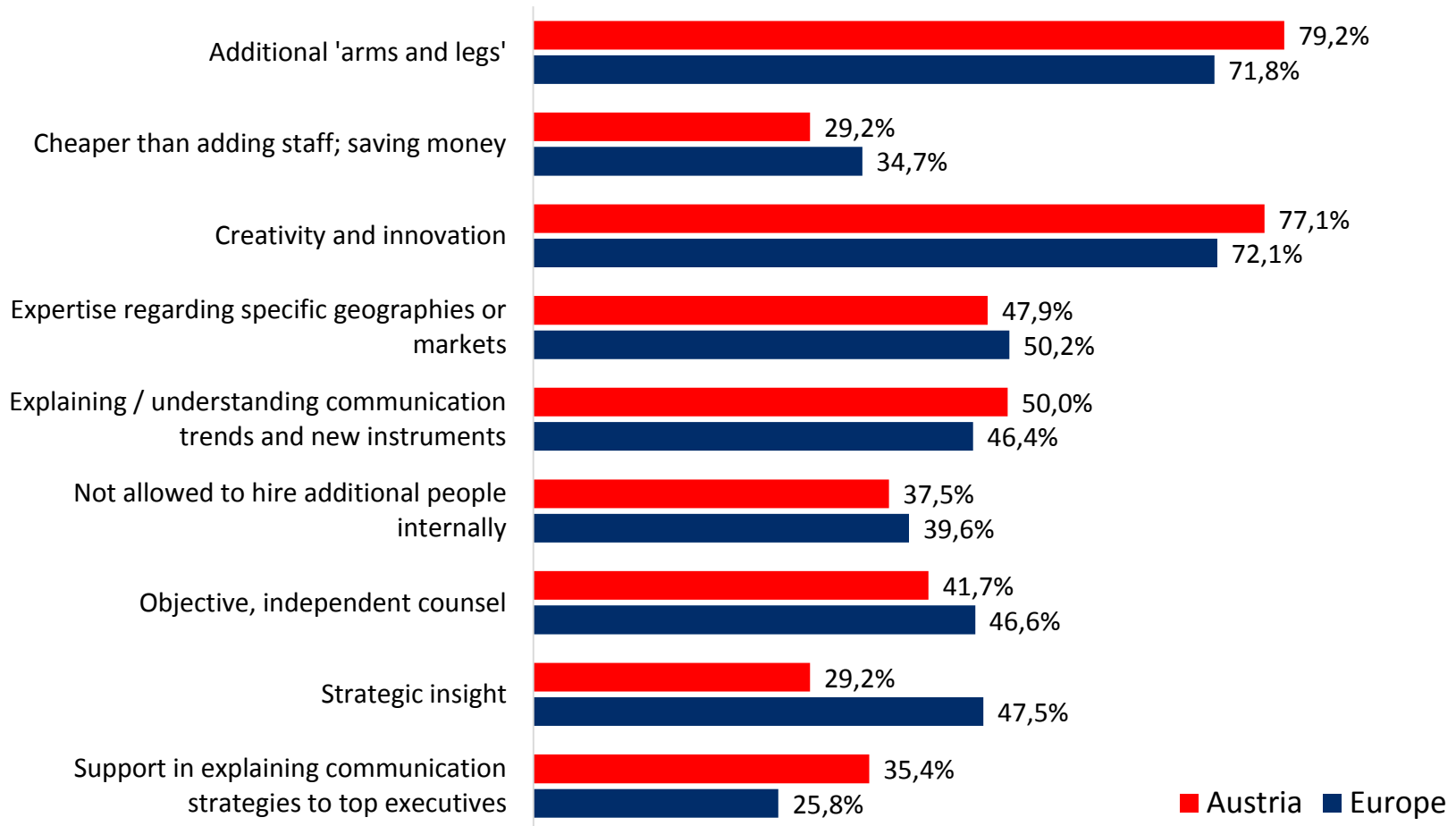
Client relationships from the perspective of communication agencies:
a clear majority works continuously for several organisations



- We work on an ongoing basis with multiple clients
- We carry out projects with clients on an ad hoc basis
- We are pre-approved supplier for agency services to one or more organisations
- We work on an ongoing basis with a single client

Why communication departments work with agencies

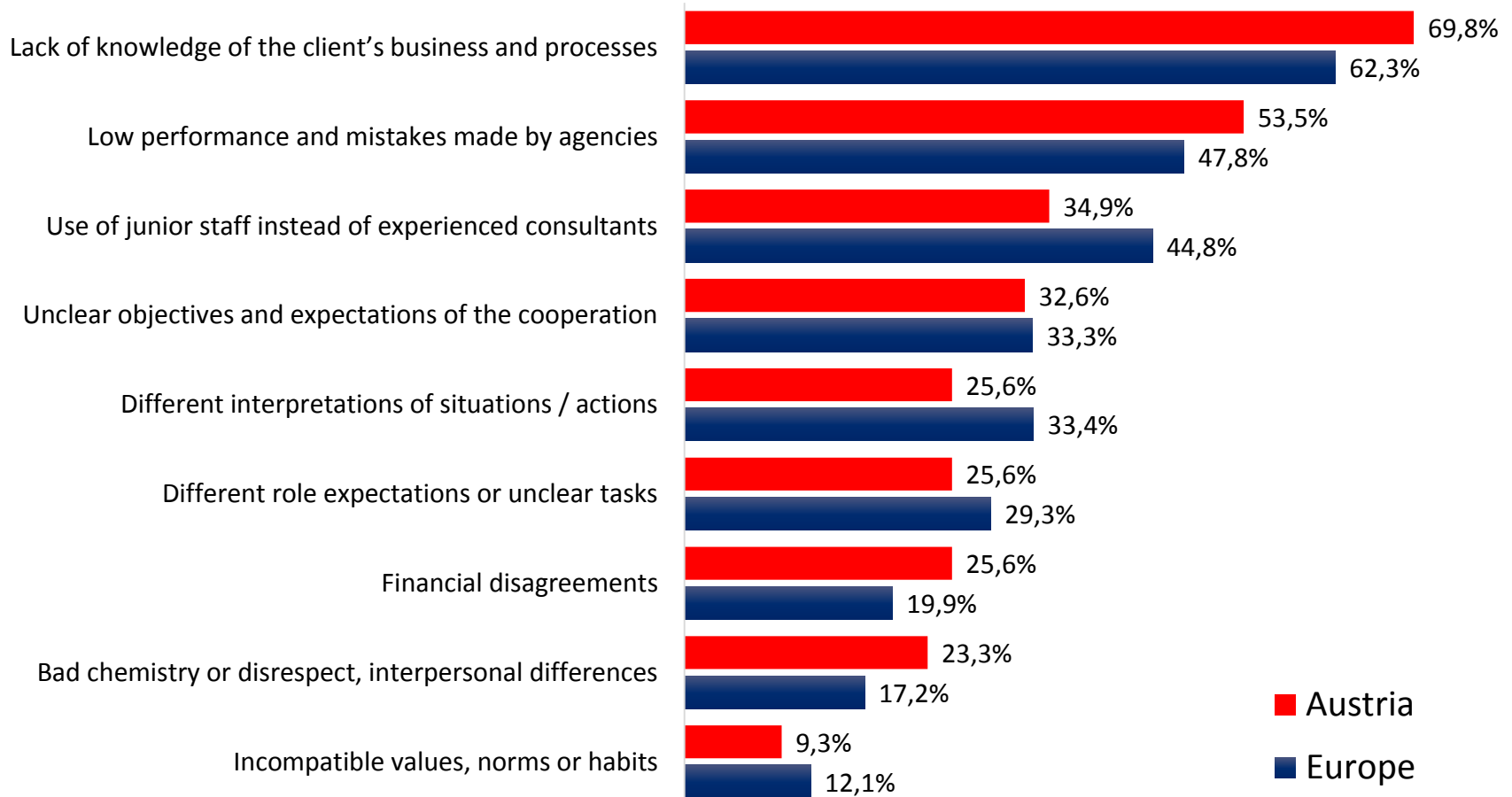
Relative importance why organisations work with agencies, freelancers and consultants



Country-to-country analysis: Why communication departments work with agencies

	Strategic insight	Creativity and innovation	Objective, independent counsel	Cheaper than adding staff; saving money	Not allowed to hire additional people internally	Additional 'arms and legs'	Expertise regarding specific geographies or markets	Support in explaining communication strategies to top executives	Explaining / understanding communication trends and new instruments
Germany	39.5%	78.2%	46.2%	38.7%	39.5%	79.8%	44.5%	18.5%	42.0%
Austria	29.2%	77.1%	41.7%	29.2%	37.5%	79.2%	47.9%	35.4%	50.0%
Switzerland	46.5%	67.6%	53.5%	42.3%	39.4%	71.8%	64.8%	25.4%	38.0%
France	46.9%	46.9%	40.6%	37.5%	50.0%	78.1%	46.9%	18.8%	43.8%
Belgium	38.9%	74.1%	33.3%	31.5%	59.3%	77.8%	33.3%	13.0%	35.2%
Netherlands	41.4%	81.6%	49.4%	32.2%	39.1%	81.6%	47.1%	19.5%	42.5%
United Kingdom	52.5%	71.3%	53.8%	26.3%	28.8%	76.3%	67.5%	17.5%	35.0%
Ireland	59.4%	40.6%	53.1%	18.8%	34.4%	53.1%	56.3%	31.3%	43.8%
Denmark	46.2%	76.9%	25.6%	38.5%	25.6%	59.0%	38.5%	28.2%	25.6%
Sweden	41.9%	73.3%	38.4%	33.7%	46.5%	74.4%	31.4%	22.1%	39.5%

Source of conflict in client-agency relationships from the client's view:
Different perceptions between European and Austrian PR professionals



Country-to-country analysis: Main reasons for conflict in client-agency relationships from the perspective of communication departments

	Unclear objectives and expectations of the cooperation	Different role expectations or unclear tasks	Financial disagreements	Different interpretations of situations / actions	Bad chemistry or disrespect, interpersonal differences	Lack of knowledge of the client's business and processes	Incompatible values, norms or habits	Use of junior staff instead of experienced consultants	Low performance and mistakes made by agencies
Germany	37.1%	30.5%	19.0%	38.1%	13.3%	61.9%	14.3%	39.0%	46.7%
Austria	32.6%	25.6%	25.6%	25.6%	23.3%	69.8%	9.3%	34.9%	53.5%
Switzerland	26.2%	36.1%	14.8%	34.4%	14.8%	63.9%	6.6%	42.6%	60.7%
France	28.6%	21.4%	25.0%	25.0%	7.1%	60.7%	17.9%	60.7%	53.6%
Belgium	38.8%	18.4%	22.4%	38.8%	6.1%	65.3%	14.3%	44.9%	51.0%
Netherlands	27.0%	43.2%	21.6%	31.1%	27.0%	48.6%	9.5%	37.8%	54.1%
United Kingdom	47.1%	17.1%	8.6%	26.3%	24.3%	61.4%	7.1%	61.4%	45.7%
Ireland	25.0%	21.4%	25.0%	35.7%	14.3%	53.6%	10.7%	60.7%	53.6%
Denmark	47.1%	41.2%	11.8%	44.1%	14.7%	67.6%	11.8%	23.5%	38.2%
Sweden	44.4%	35.8%	21.0%	29.6%	16.0%	65.4%	14.8%	34.6%	38.3%

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National supporter

PRVA Public Relations Verband Austria

Der Public Relations Verband Austria (PRVA) ist der größte unabhängige Kommunikationsverband Österreichs. Mitglieder sind rund 750 PR-Fachleute aus Agenturen, Unternehmen, Organisationen, Institutionen, Gebietskörperschaften und der Politik, davon 74 PR-Agenturen und 100 Newcomer (prNa). Ziel des PRVA ist neben der Interessenvertretung seiner Mitglieder die fachlich fundierte Aus- und Weiterbildung sowie die laufende qualitative Weiterentwicklung der Branche. Die Mitglieder sind zur Einhaltung des PRVA-Ehrenkodex und des Athener Codex verpflichtet.

www.prva.at



Partners



European Public Relations Education and Research Association (EUPRERA)

The European Public Relations Education and Research Association is an autonomous organisation with members from more than 30 countries that aims at stimulating and promoting the knowledge and practice of communication management in Europe. Academic scholars and experienced practitioners work together to advance fundamental and applied research.

www.euprera.org



European Association of Communication Directors (EACD)

The EACD is the leading network for communication professionals across Europe with more than 2,000 members. It brings in-house communication experts together to exchange ideas and discuss the latest trends in international PR. Through Working Groups on specific communications topics and diverse publications, the EACD fosters ongoing professional qualification and promotes the reputation of the profession.

www.eacd-online.eu



Communication Director

Communication Director is a quarterly magazine for Corporate Communications and Public Relations in Europe. It documents opinions on strategic questions in communication, highlights transnational developments and discusses them from a European perspective. The magazine is published by Helios Media, a specialist publishing house based in Berlin and Brussels.

www.communication-director.eu

IMPRINT

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Special evaluation of the European Communication Monitor
2015 survey for Austria

By Ansgar Zerfass & Markus Wiesenberg

Vienna, Leipzig: PRVA / University of Leipzig 2015

www.communicationmonitor.eu

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