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2023 GLOBAL COMMS REPORT

A SEMINAL MOMENT

- The “seat at the table”
- Direct and consistent interaction with the CEO
- Opportunities to facilitate, lead and influence business decisions

Strategic communications professionals have been working toward all of these for years. This sixth annual PRWeek/Cision Global Comms Report highlights some of the clearest signs yet of a significantly heightened awareness of communications’ performance — one greatly brought about due to the discipline’s recent accomplishments under pressure and more resolute reliance and embrace of data and analytics.

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Strategic comms secures elusive seat

Communications' relationship prowess has long been the bedrock of its success. For a long time, though, that has not translated to the C-suite. This sixth annual PRWeek/Cision Global Comms Report proves that narrative is changing thanks to data, analytics, and an increasingly mutual understanding by both PR professionals and CEOs alike that the discipline can impact so much more of the business than it has been allowed to up to now.

Words **Chris Daniels**

Consumers. Employees. Journalists. Investors. Politicians. Regulators. Activists. Influencers. Whether working in-house or agency-side, these are some of the key stakeholder groups with whom strategic communicators must establish and maintain relationships. From the content they produce to the crises they overcome — or help avoid entirely — and everything in between, all of that work is in the service of helping their brands connect with the audiences that matter.

One relationship that is particularly sought after is with an entity that is the ultimate arbiter of the role.

We're talking, of course, about the direct line to the C-suite: the "seat at the table" communications leadership has craved for so long. The C-suite will grant — or deny — it, based largely on what communications professionals can help brands accomplish. Communications' ability to prove what it is doing is working is a key part of that calculation.

Based on feedback from the 440 industry professionals across 10 countries who completed the survey that informs the Global Comms Report, presented by Cision in partnership with PRWeek, strategic communicators have made more progress on this front than any of the previous years of this study — and any prior to that.

Almost half of global communications professionals (47%) now report to the CEO directly, with 30% reporting to the head of marketing. This is a notable contrast from the 2020 report, in which 57% of respondents reported that communications was part of the marketing function.

And in the 2019 Global Comms Report (the last one fielded prior to the COVID-19 pandemic), 67% of respondents reported that communications was part of the marketing function.

Air of confidence

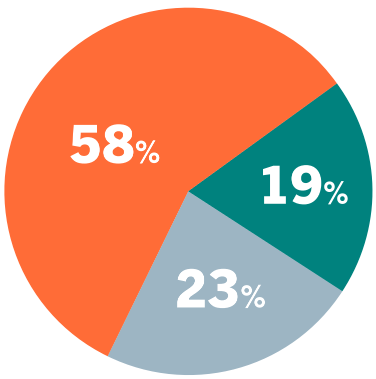
This year, though, it appears that difficult recent times have actually allowed the discipline to shine in a manner that has strengthened its position with the executive leadership in their organizations.

In last year's report, 87% of global respondents noted the C-suite had sought their counsel more than in previous years. At the close of 2022, several participants responded with personal observations that directly support the data:

- **"The turmoil in the world has put an emphasis on the importance of communications."**
- **"In times of turmoil, PR has an even bigger opportunity to help brands build or restore trust. The function will be fine."**
- **"Every year that goes by, the benefits of PR are gradually more known and embraced. It's been a slow but steady process. The past couple of years, though, it's truly moved forward."**

If there's one word that captures the prevailing sentiment of strategic communicators today, it's "optimism." Literally, as 58% describe themselves as "optimistic" about the position of communications

HOW DO YOU FEEL?

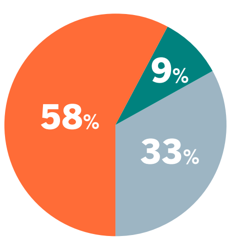


That is what our respondents reported globally when asked how they felt about their position in relation to the C-suite headed into 2023.

Below and on the next page, we break down respondents' sentiments by region, organization type and industry sector:

BY REGION

United States



Europe
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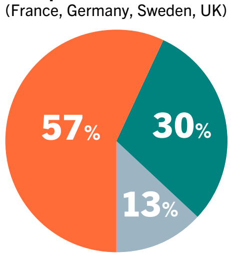
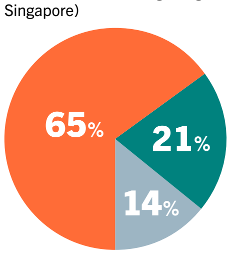


APAC
(Australia, China, Hong Kong, Singapore)



KEY

Optimistic

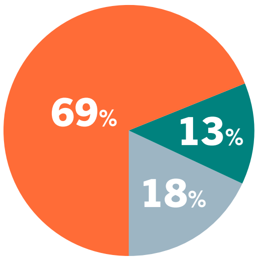
Pessimistic

Neutral

HOW DO YOU FEEL?

BY ORGANIZATION TYPE

In-House



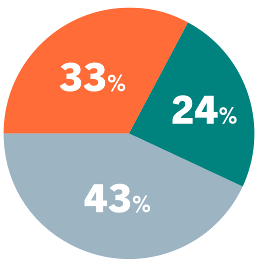
KEY

Optimistic

Pessimistic

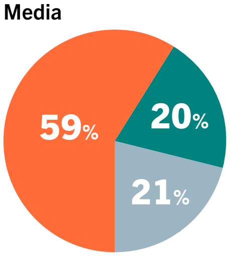
Neutral

Agency

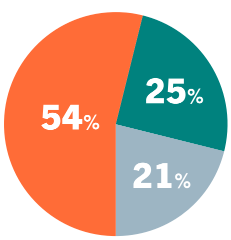


BY INDUSTRY SECTOR

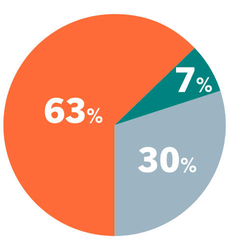
Arts/Entertainment/ Media



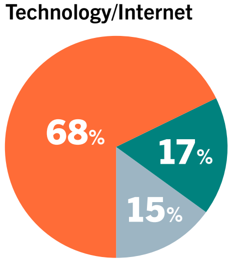
Financial Services



Healthcare/Pharma



Technology/Internet



Main Takeaway: In terms of optimism, there is a chasm between in-house and agency respondents, with the former being far more buillish. As for the industry verticals, all are majority optimistic about their position in relation to the C-suite headed into 2023. That said, it is clear the tech/internet sector is most positive, while the financial services industry is least so.

relation to the C-suite heading into 2023. Conversely, only 19% said they felt "pessimistic," with the remaining 23% being "neutral."

It's also noteworthy this survey was conducted in the fall of 2022, a time of great turbulence politically, societally and economically. During this time of global uncertainty, where anxiety and pessimism tend to take center stage, strategic communicators are telling a surprising story.

That empowered sentiment is, in part, grounded in concrete numbers. Budgets increased for close to half (44%) of in-house strategic communicators in 2022 versus 2021, with almost the exact same percentage (43%) anticipating budget increases for the coming year. (In both cases, those percentages just about double those who say it decreased/will decrease.)

The positive feeling makes its way to agency professionals, too, as 47% report client budgets had increased in 2022 as compared to the prior year, with the exact same percentage anticipating them to rise again in 2023.

Cision CMO Putney Cloos sees the optimism and budget increases as reflective of an industry "that is having a significant impact in organizations, from how they have been navigating pandemic communications to their employees to social issues."

"It also reflects," she continues, "that communications is having more strategic conversations with the C-suite."

Survey respondents back up Cloos' sentiments.

"Communications has a seat at the table and a strong influence over other C-suite executives," shares one leader who took the survey. "The C-suite has a significant amount of trust and reliance on the communications team," notes another.

And comments such as this truly underscore just how far communications has come: "As director of communications, I am a member of the C-suite six-person leadership team."

While still not widespread, the fact some strategic communications executives are company leaders themselves is a testament to progress.

Making a mark at the top

The numbers shared earlier in this report about the direct line to the CEO that nearly half of our respondents now have is as clear a sign as any of the new reporting structures that have emerged, with communications standing on its own and, in turn, participating in corporate decision-making as it never has before.

At Danone North America, Gemma Hart, VP of communications and community affairs, reports to the CEO — and she greatly appreciates what that enables her to accomplish.

"You need a strong level of CEO buy-in for our function to be an effective business partner," she emphasizes. "We're very fortunate to work so closely with our CEO. He is very explicit in his expectation that communications helps drive business strategy forward."

It is a responsibility being felt by more and more communicators — one that comes from the very top of the business.

Survey respondents were given 11 factors to choose from when asked what they believe is the CEO's (either their own or that of their clients) biggest priority as it relates to communications' impact on their business.

The only option that more than half of respondents placed in the top three (at 54%) was "building sustainable growth and value for the brand." After that, the next top answer was the "ability to respond to changing dynamics and opportunities in a timely manner" (46%).

It's also worth noting that direct bottom-line results such as "customer acquisition/engagement" (34%) and "driving sales/

revenue" (33%) scored about the same as "defining and distributing the brand story" (35%) and "crisis preparedness and/or response/execution" (34%).

It is becoming clearer that communications professionals are increasingly being seen as impactors of "hard" business numbers, just as much as they are of the more traditional metrics for which they have always been sought to affect.

The turning point

Though communications wasn't always considered by the C-suite to be a driver of growth and value, Hart cites the pandemic as a turning point when her function became a connective tissue within her organization, as the need for information became the way forward for companies, whether in protecting their employees from COVID-19 or repositioning their financial outlooks to investors.

"The fact is," she explains, "we have more information than ever before. The need for access to information is greater than before, so there is heightened transparency."

"With COVID, the Great Resignation, the racial justice movement, the war in Ukraine — and the convergence of these issues — communications has been propelled for its strategic value. That has notably strengthened our relationship with CEOs."

— JULIE BATLINER, CARMICHAEL LYNCH RELATE

Such greater visibility is also enjoyed by Cigna CCO Melissa Skottegaard, who takes great pride in her relationship with CEO David Cordani. "I am definitely meeting with him frequently, as well as all of the business leaders," she reports. "We have earned our seat and more."

When asked to reflect about how the discipline of communications has evolved, she explained, "The relationship I have with David has become very different over the past few years in that communications has become a trusted adviser," notes Skottegaard. "We're now sought out on all sorts of business matters, from board to employee issues, from COVID-19 and social justice to the media."

In the context of another key relationship — between communications and marketing — Skottegaard notes they are, "two sides of the same coin because we come at things very differently. That separation creates some healthy tension."

Agency leaders have noticed a change with their clients too.

"Communications is a strategic management function, but some CEOs in the past would only reach out to the CCO/communications team or PR agency when an issue or crisis was happening," points out Julie Batliner, president of Carmichael Lynch Relate. "With COVID, the Great Resignation, the racial justice movement, the war in Ukraine — and the convergence of these issues — communications has been propelled for its strategic value. That has notably strengthened our relationship with CEOs."

The balance of art and science

The work of strategic communicators has always been based on human relationships — the "R" in "PR" — and creativity. However, the discipline has long trailed other corporate functions in their embrace of and ability to best take advantage of data and analytics.

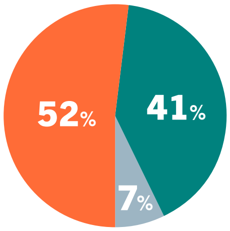
GAUGING THE CHALLENGE

A barometer of the state of the practice, we asked global survey respondents about the degree to which they feel their communications jobs are becoming increasingly challenging. This is what they had to say . . .

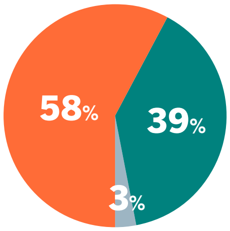
A lot | A little | Not at all

BY REGION

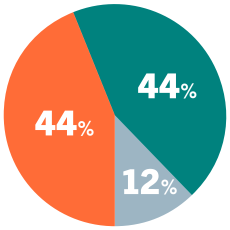
Global



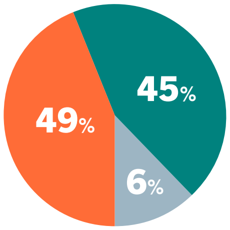
United States



Europe
(France, Germany, Sweden, UK)

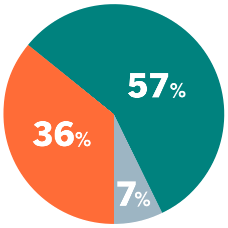


APAC
(Australia, China, Hong Kong, Singapore)

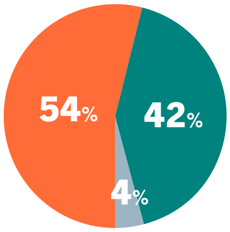


BY INDUSTRY SECTOR

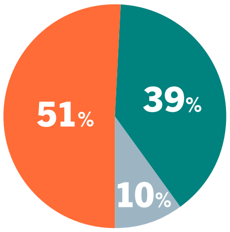
Arts/Entertainment/Media



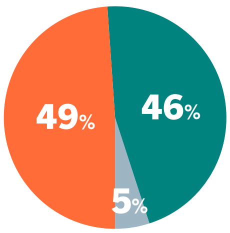
Financial Services



Healthcare/Pharma



Technology/Internet



This year's report shows definite signs that is changing. And, in doing so, it offers a logical explanation as to why communications' position with the C-suite is stronger than ever.

The data suggests that communications professionals are also embracing how science and technology can even further improve their performance on content development — the art side of the equation.

Respondents were given 11 functions over which communications has purview and often uses tech tools to assist, including news/media monitoring, press release distribution, reputation management and social listening.

It is noteworthy that the top scorer (25%) among them was "content ideation/strategy/creation (software, AI, keyword, research)." That was followed very closely by "data analysis/insights" (24%) and "impact/ROI of PR efforts" (21%). (No other option exceeded 8%.)

Communicators are relying on technology and data (read: science) as much in the creative process of producing content (read: art) as anything else.

"Data is what I live and breathe," says Skottegaard. For her, it's not limited to the company's ability to navigate a media issue. It has also helped with the production of Cigna's leadership platform, Loneliness in America, which it introduced back in 2019.

"We've been using data to continuously reinvent our platform," she reports, "maintaining our incredibly high readership of this content with information people are looking for about loneliness, such as what it looks like and how to handle it. It is a great example of how we use data proactively, as opposed to reactively."

Armando Azarloza, CEO of The Axis Agency, a multicultural communications and marketing agency, says his firm wouldn't produce creative that isn't rooted in data and research.

"You can be as creative as you can be, but your creative is only as good as your research," he advises. "Content is king in today's world, but data is what ultimately drives our creative process and cements the direction we take with the content."

And for those who worry a reliance on science will negate the artistic qualities and nuance that communications professionals bring to the table, fear not.

Yes, science brings an added element to the practice, but it will always need human intelligence and sensitivity in order to have any impact.

As Cloos notes, communicators often think with their heart — putting compassion and empathy to the fore — and that can't be lost, even as they embrace technologies such as AI and keyword research.

"Data needs to be looked at through a human lens," she explains. "We can't lose sight of the humanity communications brings to companies. All that data and AI can't be leveraged outside the context of a very human relationship."

Maintaining what has been earned

While the journey to reach a desired status within an organization may be difficult, even harder is the work to maintain that position. (In the world of sports, for example, you will often hear how it's even tougher to defend a championship than it is to win it the first time.)

Pride. Emboldened. Communicators should feel both very strongly right now, as evidenced by this report's findings. However, the more you achieve, the greater the pressure — and the obstacles — to keep progressing.

For example, over the past few years, brands have increasingly come to understand that they must ongoingly assert their voice and own their own stories in the public sphere, lest they lose control of their own narratives. The potential for individuals and influencers to be supportive or disruptive is significant.

With this unique ability to affect consumer opinions and behaviors, it's critical that communications teams understand how best to identify strategic communications partners and nurture those relationships.

"Data needs to be looked at through a human lens. We can't lose sight of the humanity communications brings to companies. All that data and AI can't be leveraged outside the context of a very human relationship."

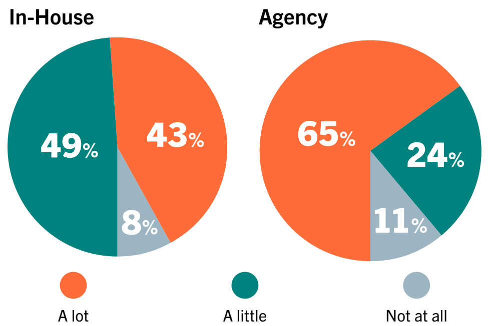
— PUTNEY CLOOS, CISION

As highlighted in the accompanying sidebar, "Obstacles to influence," there are many factors that continue to challenge communicators in this regard. In fact, only half (exactly 50%) of survey respondents give themselves a grade of "good" or "excellent" when it comes to identifying and collaborating with "the right" influencers.

The good news: Communicators are increasingly ready to put data to use to optimize performance of their campaigns — both related to influencers and more broadly. In fact, 79% of respondents answer affirmatively when asked

GAUGING THE CHALLENGE

BY ORGANIZATION TYPE



Main Takeaway: Once again, there is a notable difference between in-house and agency respondents. With the former, just about half say "a lot" when asked to what degree they feel their jobs have become increasingly challenging. With the latter, it's two-thirds who share that sentiment.

Regionally, U.S. respondents notably outpace their European and APAC counterparts in saying "a lot" to this. By industry, the gap is wide between the sector that feels this way the least (arts/entertainment/media) and the most (financial services).

if communications is relying on data and analytics more now than it was at this time last year.

More specifically, when asked to choose the three functions they would most value in an "ideal suite of tools," it's notable that "Identify and communicate with influencers" was in the top three, chosen at 38%, along with "measure impact of earned campaigns" (48%) and "Ideate and create compelling content" (43%).

That willingness to rely on data will be a crucial ingredient as communications seeks to maintain the "seat at the table" it has earned. That reality becomes crystal clear when considering that 61% of respondents still identify "inability to measure impact effectively" as their top challenge.

And this weakness is one that needs to be strengthened for the sake of communications'

Continued on Page 8

OBSTACLES TO INFLUENCE

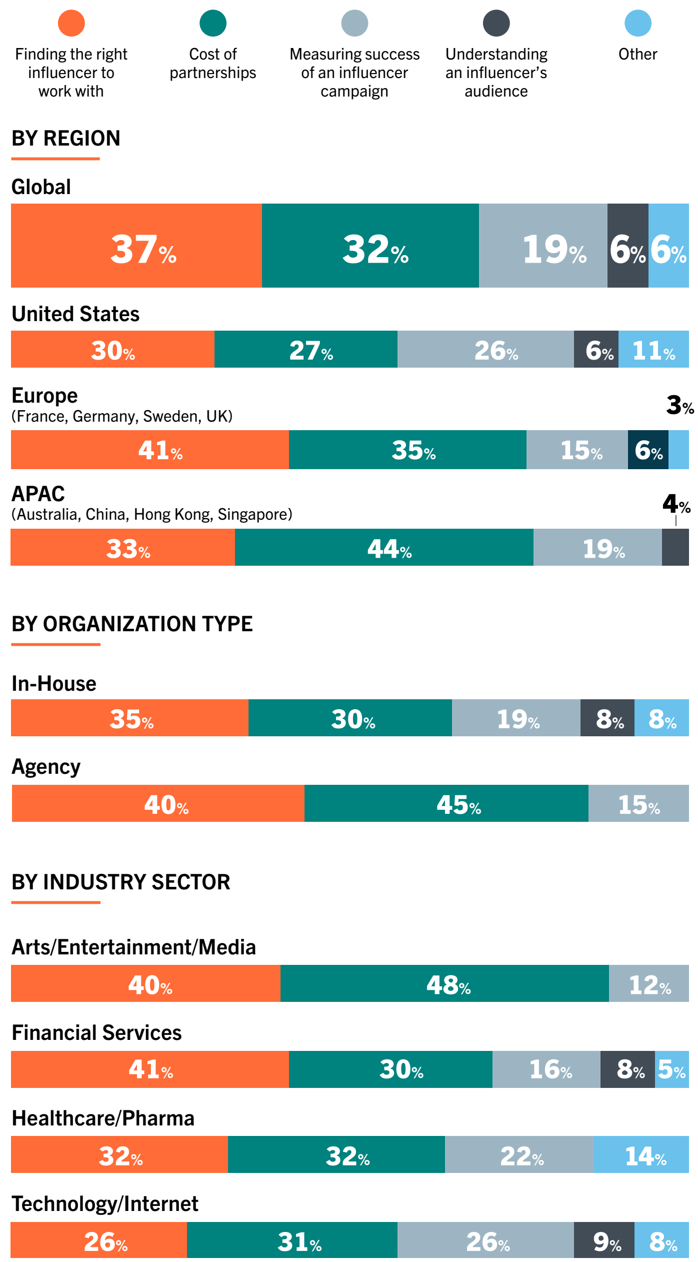
"The influencer space has become such a vast universe, that it really takes science and data to help identify the right one," says Danone's Gemma Hart.

"The U.S. market has become oversaturated with influencers who are celebrities outside social media and are not as effective because they comment on just about anything," observes Axis' Armando Azarloza.

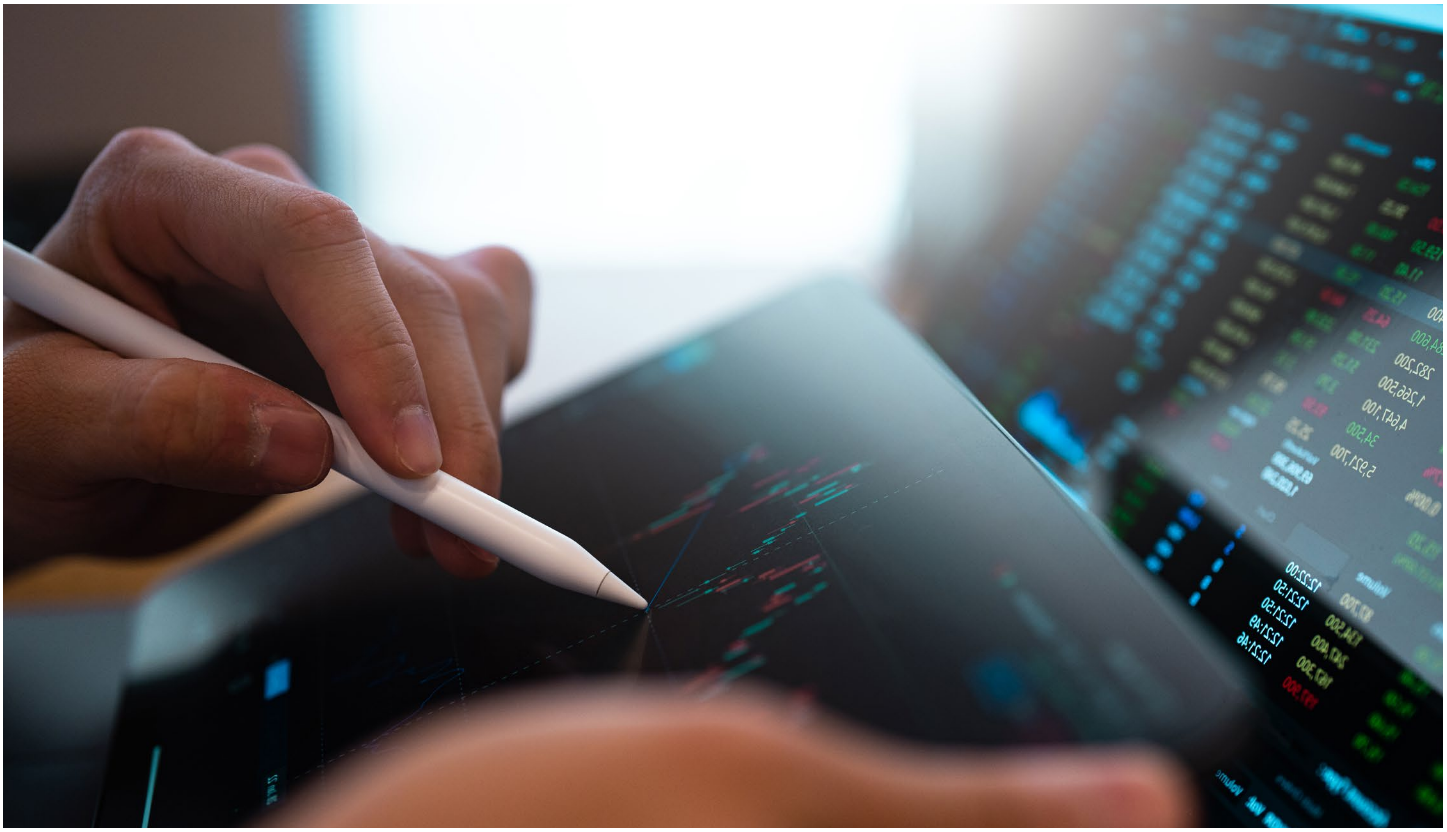
"We're really looking at who has true influence with a target audience, not just popularity," suggests Carmichael Lynch Relate's Julie Batliner**, "in getting them to notice, think or act on something, while adding a lot of credibility and authenticity to the message."**

OBSTACLES TO INFLUENCE

The sentiments on the lower left of this page, shared with us by industry leaders, reflect a clear understanding that identifying influencers with whom brands should partner can no longer be left to gut instinct. Data must play a key role in those decisions, too. However, seemingly endless are the possibilities when looking at who could potentially qualify as an influencer. And that only represents one of many challenges communicators face in this regard. What is their biggest challenge when working with influencers? We found out:



Main Takeaway: "Finding the right influencer to work with" and "cost of partnerships" are clearly the two biggest challenges across the board – regionally, by organization type and by industry sector.



continued ascent in the business world. It speaks to optimization. It speaks to the ability to deliver on goals. It speaks to efficiency and agility.

Yet again, communications teams are in the best position to tackle all these, especially when they lean in to data and analysis, and demonstrate their value at the highest levels of their organizations. Clearly, our respondents feel confident in this regard, as evidenced by the following sentiments some of them shared with us.

"We have received assurances that communications will be higher priority for budgeting in 2023."

"We just had a large town-hall event and were highly recognized by our CEO and other leaders. They are confident in us."

"We've seen amazing results this year with key pivots we've made in strategy — those wins have brought new business, so the C-suite is more vested."

"As our attribution tracking and ROI validation has improved, so has our 'street cred' with the C-suite."

Budgets are increasing. The expectation they move the needle on the bottom line and be involved in business decisions is more obvious. Both direct and indirect lines to the C-suite (and the CEO, in particular) have never been more evident.

In the six years of this Global Comms Report, never has it been more appropriate to say than it is in 2023 that communications has "arrived." However, having "arrived" is not the end game by any means. Much progress must still be made. In truth, the increased recognition and standing at the highest levels of business only amplifies that truth.

That mandate has existed for all six years of this report. It existed before that and will remain in the coming years. However, the opportunity to meet that objective, as well as the tools to help do so, are there for strategic communicators in ways and at levels they have never been before. •

About the global comms report: In 2017, inspired by the continuing evolution in how communications is both practiced and perceived, Cision and PRWeek joined forces on an initiative to clearly identify and more deeply understand communicators' use of and interaction with technology, data, measurement, content and influencers.

Now in its sixth year, this Global Comms Report from Cision and PRWeek highlights challenges and opportunities with all of the areas mentioned above and more. And with each passing year, communications' ability to rise to any occasion has become clearer, as has the respect the discipline receives from the C-suite, other internal departments, and various external stakeholders.

In fact, the past few tumultuous years — and the changes they have brought — seem to have made the discipline stronger and added to its purview.

With more opportunity and eyes watching, though, comes more responsibility. This year's report, as did the quintet that preceded it, is a powerful glimpse into how communications is doing globally — and what it can expect to do going forward.

Understanding the challenges

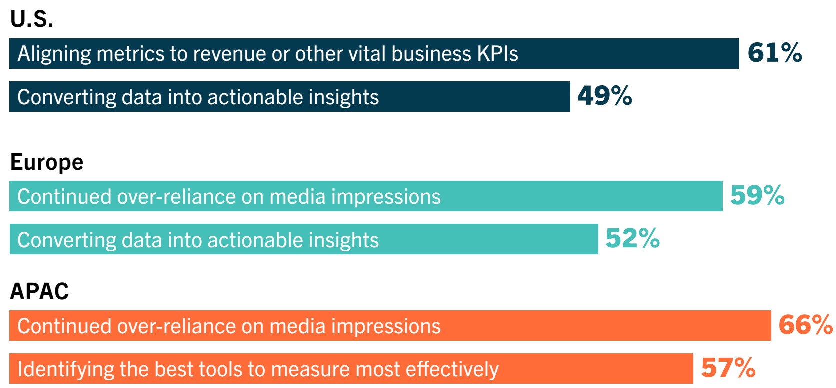
From measurement to content strategy, there are many key tasks with which communications professionals continue to struggle. On this page we spotlight many of the biggest ones.

MEASURING UP

With **61%** of global respondents placing it among their top four — and **22%** deeming it to be their top choice — **"inability to measure impact effectively"** is clearly the aspect of their jobs troubling strategic communicators the most. Below we delve deeper to ascertain what percentage of our global respondents are experiencing the following six specific challenges:

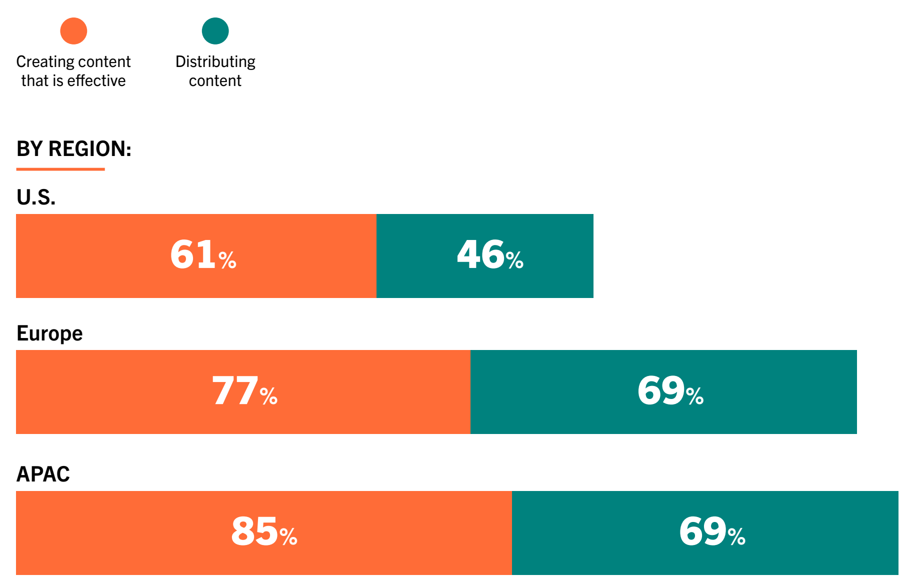
- **Aligning metrics to revenue or other vital business KPIs: 50%**
- **Converting data into actionable insights: 50%**
- **Continued over-reliance on media impressions: 49%**
- **Identifying the best tools to measure most effectively: 41%**
- **Lack of access to efficient measurement tools: 23%**
- **Proving/validating PR's impact to the C-suite: 21%**

BY REGION, THE TOP TWO REPLIES ARE:



CONTENT CONUNDRUM

These percentages indicate how many of our global respondents are struggling with the following two earned-media challenges:



(Note: In our study, ***Europe*** *includes France, Germany, Sweden and the U.K.* ***APAC*** *includes Australia, China, Hong Kong and Singapore.)*

Main Takeaway: Difficulties in proving business impact is noted as the most challenging issue among U.S. respondents far more than other regions. Meanwhile, European and APAC communicators still seem too reliant on media impressions to prove the impact of their work.

Who has the power to persuade?

*Main percentages on this page indicate how many respondents placed that influencer among the three most effective at impacting consumer behavior this year. (Percentages in parentheses indicate how many respondents selected that influencer type as their very top choice.)

Third-party endorsements can be worth their weight in gold because consumers increasingly look to them when deciding which brands to support with their hearts, minds and wallets. On this page, we list seven such influencer types and indicate the ones our respondents deem to be the most persuasive voices and, as such, strong partners with which brands should work.

BY REGION

*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore.)*

	GLOBAL	U.S.	EUROPE	APAC
Celebrities (actors, artists, athletes, social media stars)	41% (20%)	22% (8%)	51% (29%)	69% (35%)
Everyday consumers (which would include family, friends and strangers)	38% (9%)	27% (11%)	43% (6%)	55% (11%)
Corporate executives	31% (9%)	23% (11%)	36% (6%)	40% (11%)
Mainstream journalists	30% (6%)	35% (11%)	24% (1%)	31% (3%)
Bloggers	30% (16%)	23% (7%)	37% (26%)	37% (18%)
Employees	28% (8%)	23% (4%)	37% (11%)	25% (9%)
Micro-influencers	20% (6%)	34% (12%)	11% (1%)	6% (0%)

BY INDUSTRY

	Celebrities	Bloggers	Everyday consumers	Mainstream journalists	Corporate executives	Employees	Micro-influencers
ARTS/ENTERTAINMENT/MEDIA	61% (39%)	43% (23%)	36% (5%)	36% (5%)	34% (2%)	16% (5%)	11% (2%)
FINANCIAL SERVICES	50% (19%)	27% (23%)	46% (19%)	23% (2%)	46% (6%)	31% (8%)	8% (0%)
HEALTHCARE/PHARMA	37% (22%)	27% (10%)	34% (5%)	32% (2%)	32% (22%)	41% (10%)	24% (5%)
TECHNOLOGY/INTERNET	34% (17%)	22% (10%)	34% (7%)	56% (15%)	44% (17%)	34% (7%)	32% (12%)

Main Takeaway: Celebrities remain desirable influencers for our respondents broadly, though of all the groups presented above, the U.S. is a noteworthy outlier. The value U.S. communications professionals place on micro-influencers also exceeds all the other groups.

Platform preferences: By region

Decisions about which social media channel to prioritize with content are just as important for brands as the choices they make about the content itself. With that in mind, we asked respondents to choose the four platforms (out of 10) they deem most valuable to their broader content strategy. Below, we report on responses by region — and compare this year's responses to last year's.

*Main percentages on this page indicate how many respondents placed that social platform among the four most important to their broader content strategy this year

BY REGION, 2022

	GLOBAL	U.S.	EUROPE	APAC
Facebook	73%	77%	70%	74%
Instagram	68%	78%	65%	45%
LinkedIn	65%	79%	51%	62%
Twitter	50%	73%	32%	34%
YouTube	42%	60%	26%	15%
TikTok	33%	21%	42%	45%
Pinterest	23%	5%	37%	35%
Reddit	19%	6%	33%	28%
WhatsApp	15%	2%	27%	23%
WeChat	12%	2%	16%	40%

*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore. We only surveyed China and Hong Kong last year. Australia and Singapore are new countries in our survey this year. In addition, WeChat was not an option in last year's survey.)*

BY REGION, 2021

	GLOBAL	U.S.	EUROPE	APAC
Facebook	79%	85%	74%	68%
Instagram	67%	72%	65%	55%
LinkedIn	59%	71%	48%	43%
Twitter	54%	71%	37%	33%
YouTube	56%	69%	39%	33%
TikTok	23%	14%	31%	42%
Pinterest	18%	7%	27%	38%
Reddit	13%	4%	21%	20%
WhatsApp	15%	4%	22%	43%
WeChat	N/A	N/A	N/A	N/A

Platform preferences: By industry

There are notable differences in preferred content platforms from one industry sector to another. Below, we focus on four major verticals and report on those differences — and compare this year's responses to last year's as we do so.

*Main percentages on this page indicate how many respondents placed that social platform among the four most important to their broader content strategy this year

BY INDUSTRY, 2022

	ARTS/ENTER-TAINMENT/MEDIA	FINANCIAL SERVICES	HEALTHCARE/PHARMA	TECHNOLOGY/INTERNET
Facebook	73%	60%	76%	63%
Instagram	80%	65%	63%	51%
LinkedIn	64%	65%	76%	73%
Twitter	43%	46%	54%	73%
YouTube	25%	31%	61%	49%
TikTok	30%	31%	37%	34%
Pinterest	36%	35%	7%	15%
Reddit	23%	21%	12%	20%
WhatsApp	16%	21%	10%	10%
WeChat	11%	25%	5%	12%

*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore. We only surveyed China and Hong Kong last year. Australia and Singapore are new countries in our survey this year. In addition, WeChat was not an option in last year's survey.)*

BY INDUSTRY, 2021

	ARTS/ENTER-TAINMENT/MEDIA	FINANCIAL SERVICES	HEALTHCARE/PHARMA	TECHNOLOGY/INTERNET
Facebook	84%	69%	83%	71%
Instagram	74%	54%	68%	61%
LinkedIn	53%	58%	66%	80%
Twitter	53%	42%	57%	66%
YouTube	53%	51%	66%	57%
TikTok	26%	33%	23%	20%
Pinterest	16%	26%	11%	13%
Reddit	18%	29%	9%	9%
WhatsApp	5%	17%	15%	9%
WeChat	N/A	N/A	N/A	N/A

Main Takeaway: Facebook remains a powerful platform, but where it once was atop every list by a comfortable margin, that is no longer the case. In fact, Instagram and LinkedIn best it in a few cases.

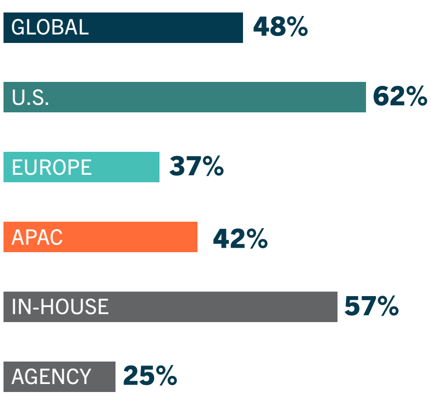
It's also worth noting how LinkedIn is becoming a more prominent content platform in every region we surveyed, while TikTok saw notable gains in all regions, as well.

Content considerations: Purviews and priorities

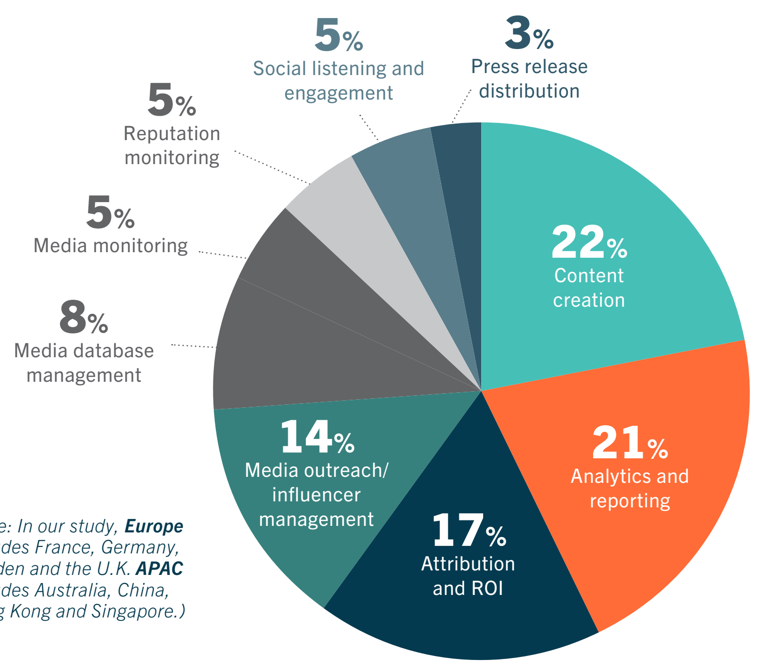
There are few factors more important to strategic communicators than content. And there is ample data from our respondents to underscore this. However, there is also ample data to highlight the reality that the matters over which PR has purview are more plentiful than ever, including some that might take up more time and focus than content.

THE BIGGEST PRIORITY?

We offered nine common communications activities and asked respondents to identify their top three. The percentages below reflect those who placed "content creation" — which was prominent with all groups — among their top three.



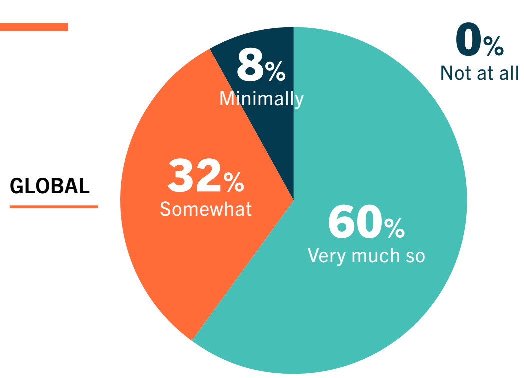
Below we share all nine factors presented to our respondents and reveal the percentage of them — globally — who chose that factor as their single-biggest priority:



(Note: In our study, ***Europe*** *includes France, Germany, Sweden and the U.K.* ***APAC*** *includes Australia, China, Hong Kong and Singapore.)*

TAKING SHAPE?

Does communications get ample opportunity to shape content strategy and execution (including social media activity)?



Below we share percentages of those who said "Very much so" by region and organization type:

U.S.: 71%
EUROPE: 45%
APAC: 61%
AGENCY: 49%
IN-HOUSE: 76%

25% of global respondents cited "content ideation/ strategy/creation" when asked to identify the single-most important function (from 11 options) when they consider using tech tools to boost their efforts.

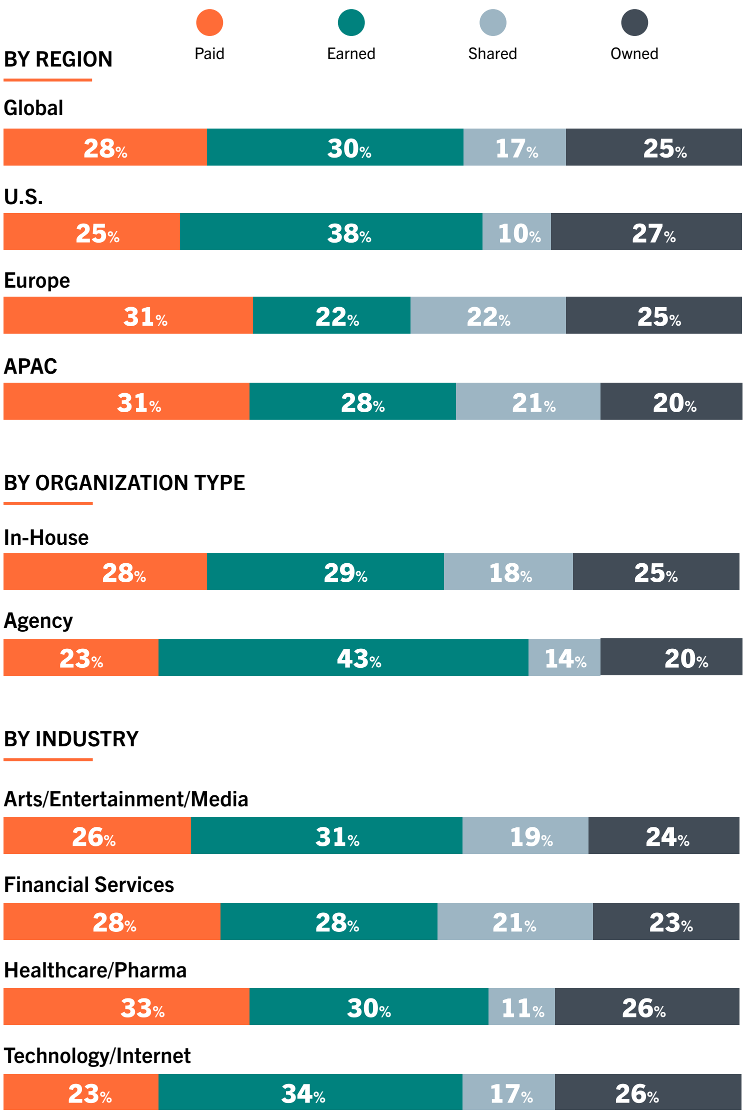
Main Takeaway: Broadly speaking, content remains the top priority for strategic communicators. However, that statement can be made much more strongly in the U.S. (when compared to other regions) and among in-house respondents (as opposed to those at agencies). Just as clear is the fact that activities heavily reliant on data (analytics and reporting, attribution and ROI) are prioritized nearly as much as content.

Content considerations: Tactical approach

A tactical look at content, including media-budget allocation and preferred platforms to most powerfully influence stakeholder behavior.

PESO PROFILES

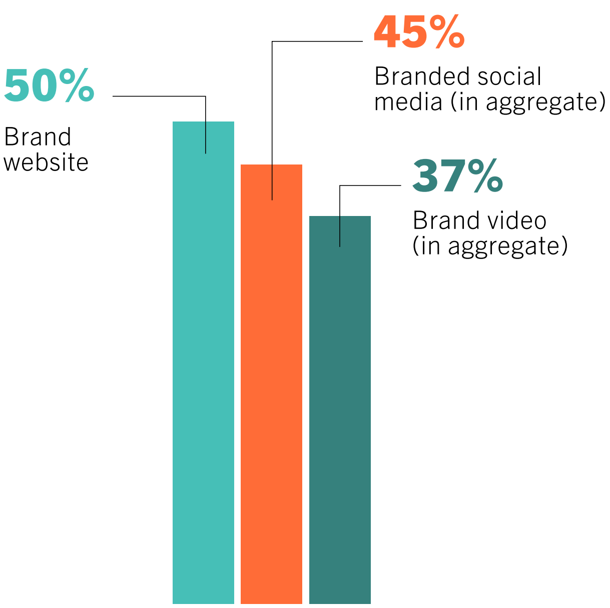
Please indicate in percentages how much of your media budget is allocated to each of the following:



*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore.)*

WHAT'S MOVING YOUR AUDIENCE?

We presented 14 different options and asked strategic communicators to choose the ones most effective at influencing stakeholder behavior. Globally, a trio clearly stood out. *(Percentages below indicate how many respondents placed that option among their top three.)*



*Note: The next closest options were **branded podcast/other audio content** and **digital advertising** (28% each).*

Noteworthy deviations from the above include …

- U.S.: **Events** scored third (35%); brand video (in aggregate) scored fifth (30%)
- Europe: **Branded podcast/other audio content** scored third (39%); branded social media (in aggregate) scored fifth (34%)
- APAC: **Branded podcast/other audio content** scored second (46%); brand video (in aggregate) scored fourth (38%)

Note: The top three among agency and in-house respondents mirrored the global findings.

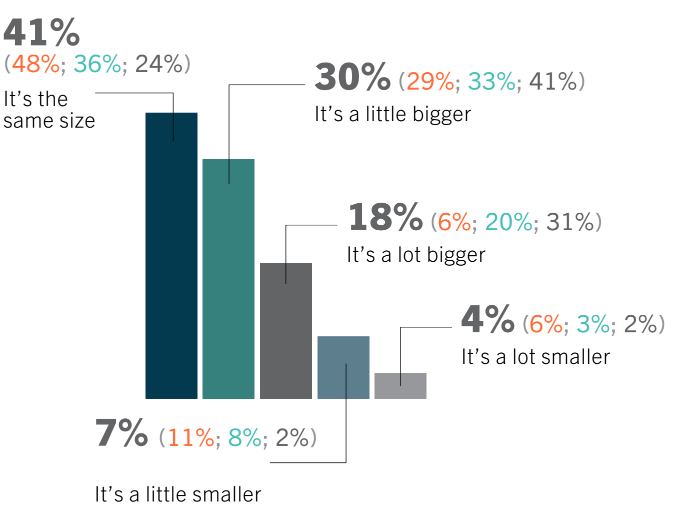
Main Takeaway: Globally, as well as in many of the individual groups above, more budget is being allocated to earned content than any other. It's not a clean sweep, though, as paid gets the most budget in Europe and APAC, as well as among those in the healthcare/pharma space.

The difference a year makes: Significant growth

No annual report is complete without highlighting some year-over-year comparisons. From team size to reliance on data/technology to the matters over which the communications team is involved, below we share some key global indicators that reveal how the day-to-day is evolving for its professionals.

*Note: The initial percentages represent global responses. (Those in parentheses indicate the responses from the **U.S.**, **Europe** and **APAC**, respectively)

How does the current size of your internal communications team compare to what it was at the same time last year?



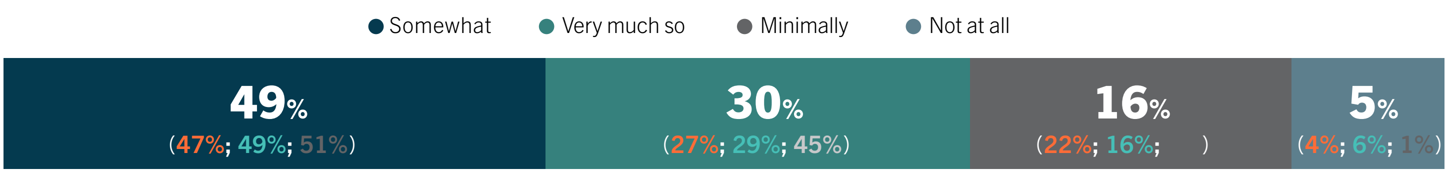
Percentages below indicate those who responded "YES, MORE THAN LAST YEAR" when asked about communications' involvement in INTERNAL messaging on the following matters?

DE&I (Diversity, Equity and Inclusion) **39%**
(33%; 42%; 51%)

ESG (Environmental, Social and Governance) **31%**
(20%; 39%; 51%)

Human Resources **31%**
(23%; 34%; 46%)

Is communications relying on data and analytics more now than it was at this time last year?



Percentages below indicate those who responded "YES, MORE THAN LAST YEAR" when asked about communications' involvement in EXTERNAL messaging on the following matters?

DE&I (Diversity, Equity and Inclusion)	ESG (Environmental, Social and Governance)	Human Resources
35% (28%; 39%; 52%)	**33%** (20%; 43%; 55%)	**27%** (20%; 37%; 28%)

*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore.)*

Main Takeaway: Globally, more than four times as many respondents say their teams are bigger year-on-year as opposed to having gotten smaller. And it's noteworthy that more respondents globally report their teams are bigger year-on-year as opposed to being the same size.

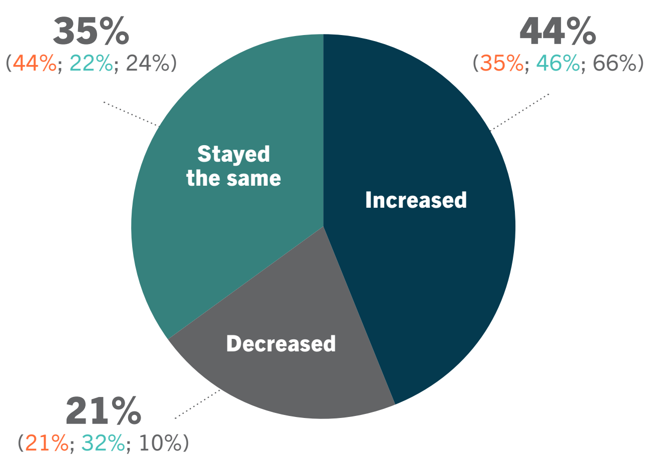
The difference a year makes: Money matters

Continuing with the comparison theme from the previous page, below we highlight global data specific to both progress and expectations pertaining to budgets.

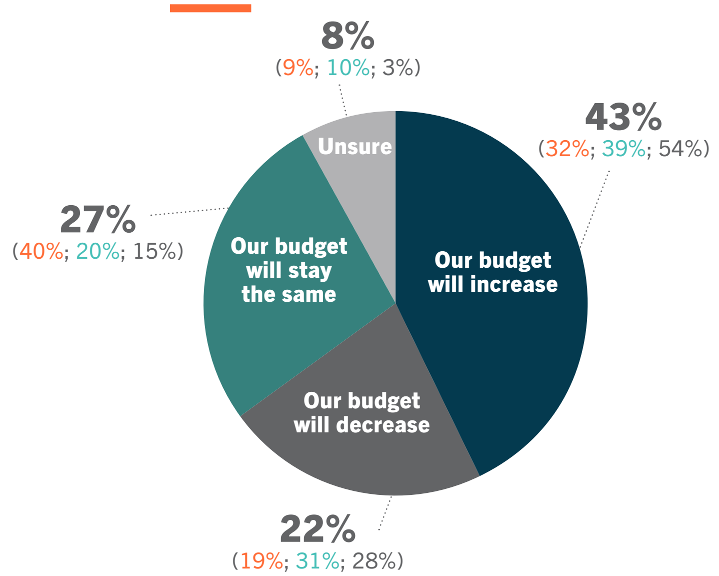
*Note: The initial percentages represent global responses. (Those in parentheses indicate the responses from the **U.S.**, **Europe** and **APAC**, respectively)

NON-PR AGENCY respondents only

As compared to this time last year, has your budget increased, decreased or stayed the same?

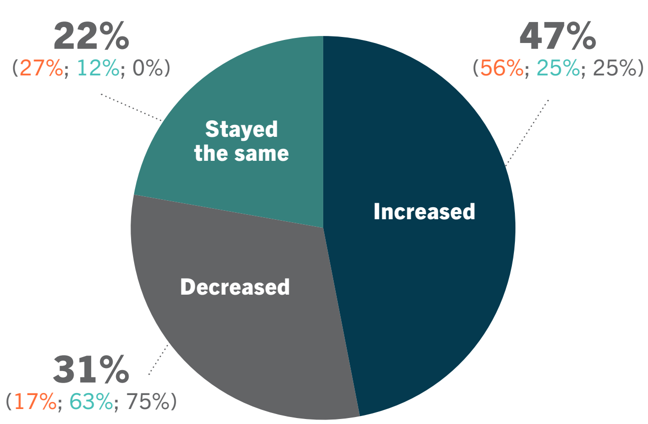


What are you anticipating for 2023?

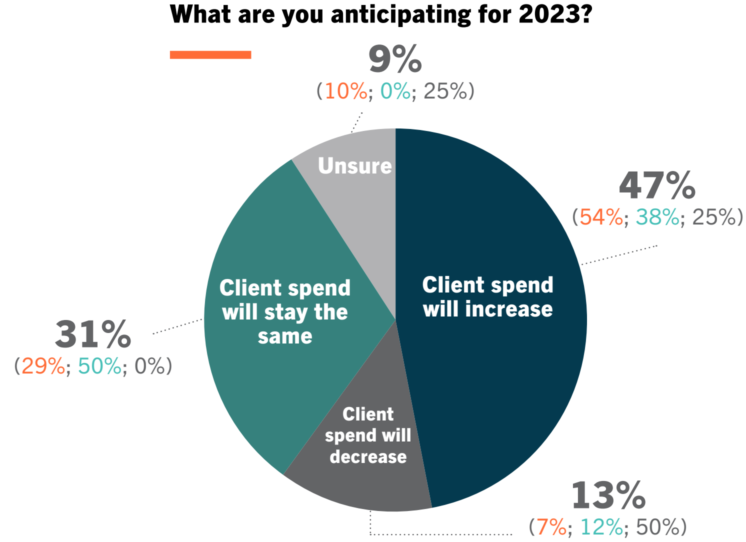


PR AGENCY respondents only

As compared to this time last year, has client spend with you increased, decreased or stayed the same?



What are you anticipating for 2023?



*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore.)*

Main Takeaway: Broadly speaking, both reflections and predictions on budgets are bullish, as more respondents report increases from last year AND expect increases next year than those who report decreases or staying flat. Interestingly, the U.S. is slightly less bullish than Europe and APAC among in-house respondents, but it is far more bullish among agency respondents than in the other two regions.

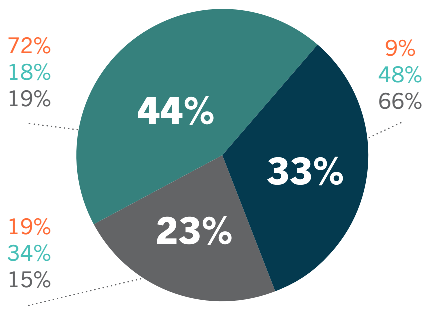
The difference a year makes: Tools of engagement

Here's trend data on eight specific **media/influencer engagement** tactics to find out how much communications professionals rely on each as compared to last year.

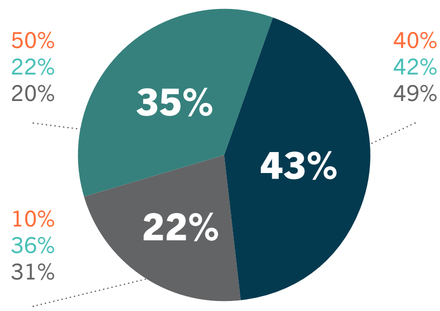
*Note: The percentages within the pies represent global responses. Those outside the pies represent responses from the **U.S.**, **Europe** and **APAC**, respectively.

More | Less | The same amount as last year

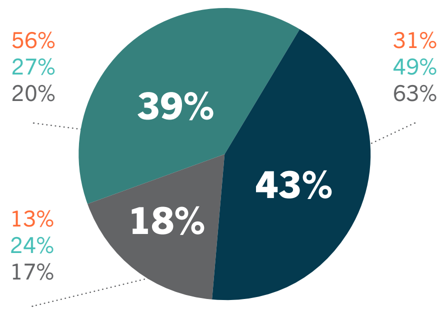
Content syndication (such as Contently)



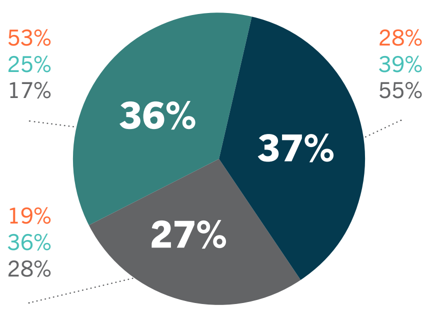
Earned media



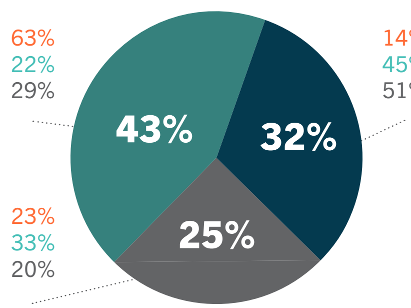
Influencers (bloggers, social media personalities, etc.)



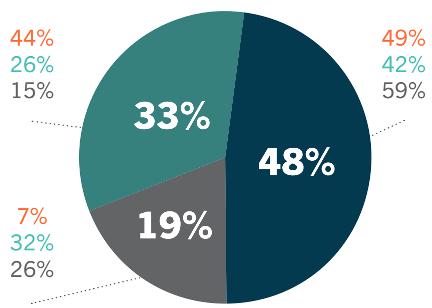
Press release distribution (direct to targeted recipients)



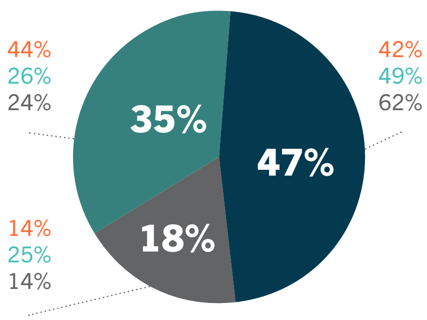
Press release syndication (direct to web platforms)



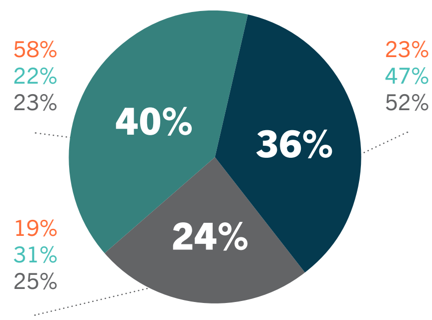
Social media (earned)



Social media (paid)



Sponsored content (advertorials, for example)



*(Note: In our study, **Europe** includes France, Germany, Sweden and the U.K. **APAC** includes Australia, China, Hong Kong and Singapore.)*

Main Takeaway: Social media — both earned and paid — is clearly the area upon which strategic communicators' reliance has increased the most year on year. Earned media and influencers are not far behind.

Also notable is the fact that with five of the eight options provided, the gap is at least 25% between U.S. and APAC respondents. As for European respondents, the percentages are much closer to those in APAC.

METHODOLOGY

PRWeek partnered with Cision on this survey, which was sent via email to both communications and marcomms professionals in the U.S., Canada, France, Germany, Sweden, U.K., Australia, China, Hong Kong and Singapore. Temra Ward Consulting assisted with survey collection in all markets outside the U.S.

A total of 440 senior-level professionals, from both agencies and in-house, completed the online survey, conducted by PRWeek, between September 15 and October 5, 2022. Results are not weighted and are statistically tested at confidence levels of 90% and 95%.

CISION

ABOUT CISION

Cision is a comprehensive communications platform enabling more than 100,000 public relations and marketing professionals around the world to understand, influence and amplify their stories. As the market leader, Cision enables the next generation of communications professionals to strategically operate in the modern media landscape where company success is directly impacted by public opinion. Cision has offices in 24 countries through the Americas, EMEA and APAC, and offers a suite of best-in-class solutions, including PR Newswire, MultiVu, Brandwatch, Cision Communications Cloud® and Cision Insights. To learn more, visit www.cision.com and follow @Cision on Twitter.

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