AI IN THE COMMUNICATIONS INDUSTRY 2023

OPPORTUNITIES AND RISKS

Sandpiper

Inform. Create. Shape.

ChatGPT has sparked considerable discussion across the communications industry globally. Countless opinion pieces, Tweets and blog posts illustrate both the enthusiasm and nervousness that communications professionals are experiencing around the sudden availability of generative AI tools, helping spark 100 million monthly active users of ChatGPT within two months of its launch.

Our research, carried out in March 2023, shines a light on the challenges the industry faces and finds that most people globally are positive about AI and are embracing these new tools and capabilities as an opportunity rather than a threat. However, as with many other industries, we are still only in the experimental phase of seeing how AI can support and enhance the craft and role of communicators.

One of the key findings from our study, which is based on a survey of 406 communicators residing across five continents, is that views are slightly polarised over whether the industry and its leaders are moving too fast or too slow. While over half believe that industry leaders need to move faster, over half also don't believe leaders are taking the potential risks seriously enough. Most respondents also feel their leaders do not know enough about these new technologies, nor understand how to capitalise on the opportunities or manage the growing risks. Many also do not have a plan how to integrate AI into their team's day to day operations. This feeds into a feeling that there has not been enough training or education.

Our study underlines a key challenge that is plaguing many – that the technologies are so new that in fact no one has yet figured out how to integrate them effectively into daily working practices. Despite this, the horse has clearly bolted: 61% of professionals are already using AI as part of their toolkit. Looking to the future, 89% expect the technology to become part of 'business as usual' within the next six months, and 65% of respondents forecast major transformation happening at an industry level within the next three years.

For most, AI-based tools are used and will be used in the future to remove some of the mechanical tasks such as research and data analysis. That said, many are already employing tools such as Midjourney and Jasper to generate creative ideas as well as deliver content for social media and write copy-heavy work at speed. In time, this should serve to provide communicators with better

and faster access to insights as well as more time and headspace to support a higher level of thinking around communications strategies and campaigns.

This has given many pause for thought. While some areas of this report show polarised views, there is strong agreement that ethical, governance and data ownership risks exist, and will need to be managed. Can AI ever replace human judgement in this area? Most it seems would say not.

With the technology in the hands of everyone, governance risks can be expected to increase dramatically. Already issues with deepfakes abound, today with just a handful of dollars and a few minutes you can create your own manipulated video. With the rapid advances in AI and speech synthesis, soon a single image or a few seconds of audio or video will suffice to generate life-like replicas of anything or anyone. We have entered an era where for the first time we have to be sceptical of not just what we read online, but also of what we see on video.

Despite these growing risks, our study finds that most still have not had any training in these areas.

Given the embryonic nature of AI in communications, there is uncertainty about how AI technologies will alter the dynamics of client-agency relationships. Many feel it offers an opportunity for agencies through efficiencies and by creating a more level playing between agencies of different sizes, capabilities, and geographical reach.

What is clear is that the start of 2023 has been a period of reflection for many, contemplating how AI technologies and tools may help – or hinder – the future of communications and how humans and machines will best work together. Whichever direction of travel the technology takes, many are already clear about where they see AI helping their day-to-day workload, as well as areas where they are less certain about the role it can play.

We hope our report can help spark useful conversations about how our industry is reacting to the opportunities and challenges presented by AI, and the choices that we face in the immediate future. Whether we like it or not, AI is here to stay, and we can choose to embrace and use it to take our industry's capabilities to the next level, or to do what many did when social media arrived; ignore it and hope it goes away.

Emma Smith
CEO

Positivity favours the old

In one of the few findings that has a sense of widespread agreement, the vast majority of communications professionals globally view AI as an opportunity rather than a risk. Nearly 86% see the upside of the technology with those between the ages of 35-44 years, most likely at the mid-point of their careers and in manager to senior manager roles, significantly more likely to see the opportunity compared to those in the younger or older age groups.

This is perhaps explained by the fact that those over 45 tend to be less comfortable around new technology, particularly one that has the ability to change the way things are done fundamentally. Those at the beginning of their careers may worry more about 'being replaced' by technology in the future as further advances in AI and other new technologies are likely to have a greater impact over the longer time span of their careers.

AI as an opportunity rather than a risk

Under 35 years
84%

35-44 years
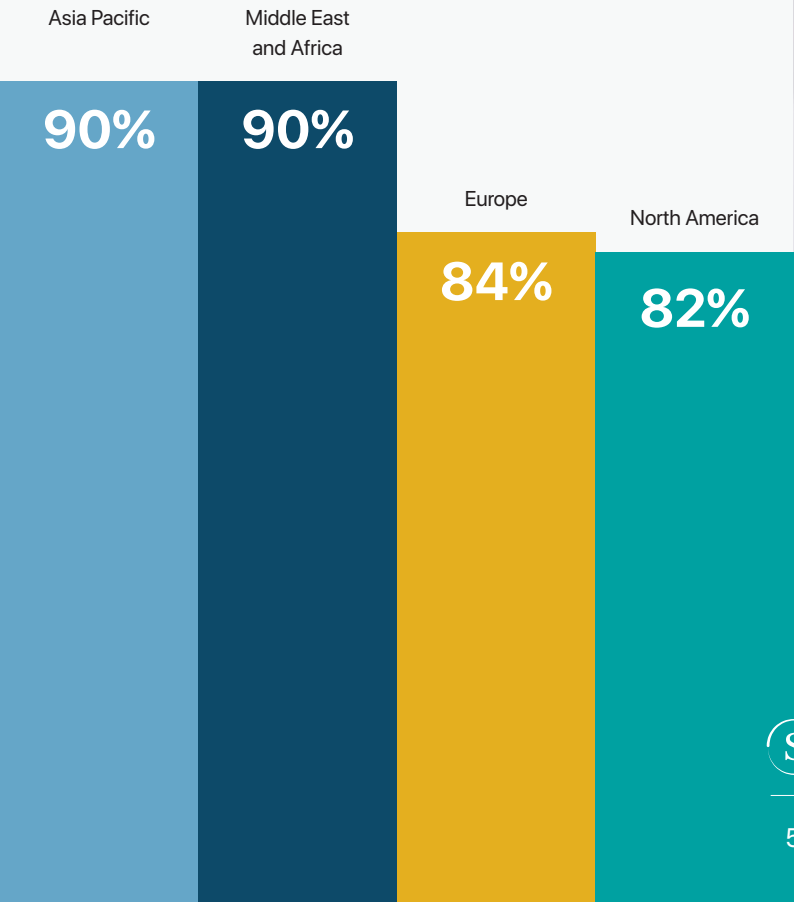**91%**

45 years and over
83%
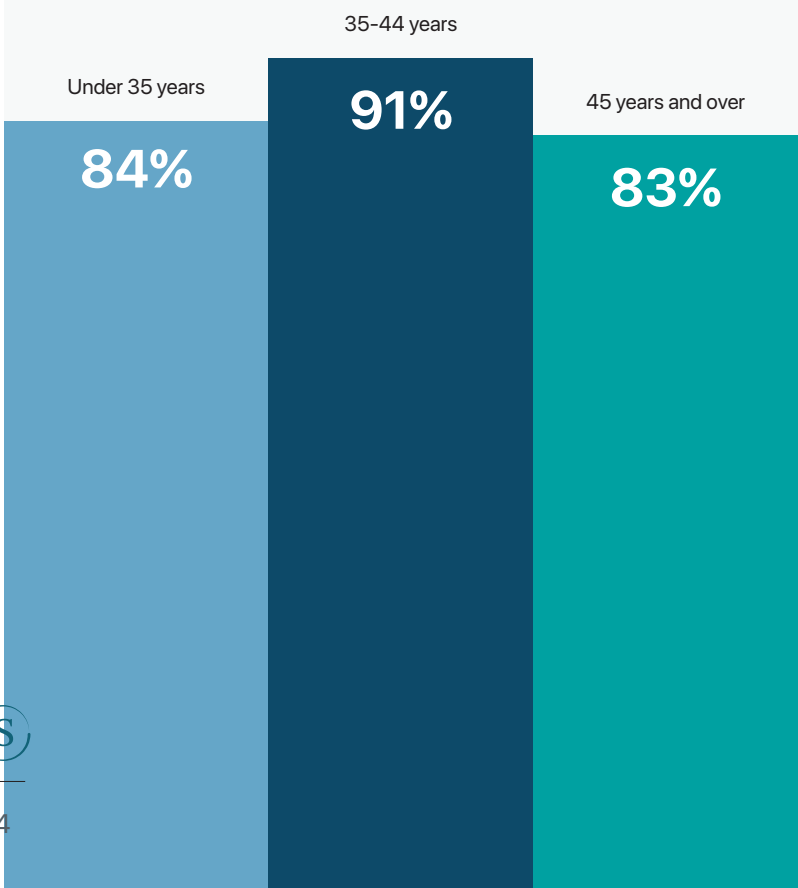
Almost half of our respondents (49%) believe that AI tools will have a positive impact on the quality of work produced across the communications industry in the future. However, less than one in three respondents (29%) are worried that advances in AI will replace or reduce their roles. Again, when looking at the breakdown by age group, considerable variations exist – almost double the number of younger people under 35 are worried about AI replacing their roles at 40% compared with just 21% of those over the age of 45.

The positivity towards AI is relatively uniform across the world but in what may be considered a slightly surprising result, North America is at the bottom despite many use cases for AI technologies originating from this region. This may be due to tighter regulatory controls and a slightly heightened sense of these concerns.

Worried that advances in AI will replace role in the future

Under 35 years
40%

35-44 years
34%

45 years and over
21%
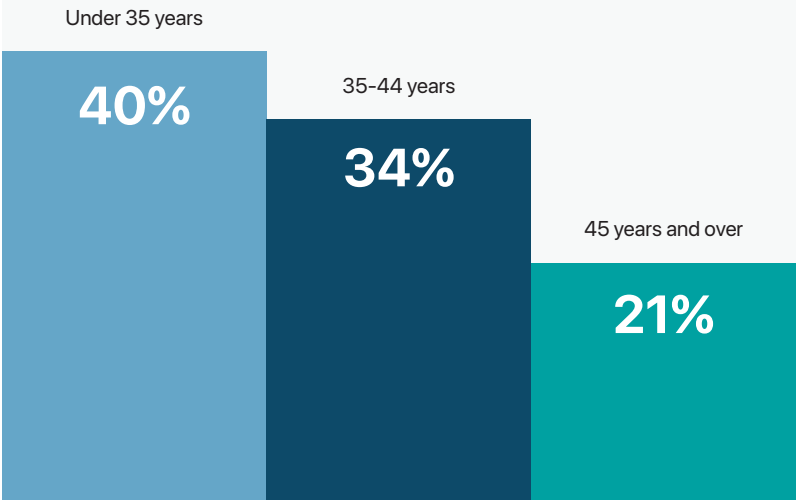
Positivity towards AI by region

Asia Pacific
90%

Middle East and Africa
90%

Europe
84%

North America
82%

Too fast or too slow?

Nearly two thirds (65%) of those we interviewed globally forecast major transformation happening at an industry level within the next three years due to advances in AI technologies.

Amid this change there are concerns that industry leaders – perhaps intimidated by the speed of change – are not acting quickly enough either to capitalise on the opportunities or to manage the risks posed by AI.

Close to six out of 10 (58%) globally believe industry leaders need to move faster to capitalise on the recently created opportunities presented by generative AI and a similar number (59%) believe they need to move faster to manage risks. Strong regional variations exist, with those outside of Europe and North America largely more eager to see faster action. Interestingly, in all regions expect for North America, being too slow to capture opportunities is seen as more of a risk factor.

On the flipside, a considerable contingent also are likely to feel change may be taking place without sufficient consideration – with 53% globally believing industry leaders aren't taking the risks seriously enough and 43% saying leaders are acting without thinking through the potential implications and consequences.

	Global	Middle East and Africa	Asia Pacific	Europe	North America
Industry leaders must move faster to capitalise on opportunities	58%	78%	70%	58%	47%
Industry leaders must move faster to manage risks	59%	65%	60%	56%	59%
Industry leaders are not taking the risks seriously enough	53%	65%	51%	51%	52%
Industry leaders are acting too quickly to integrate generative AI into their offerings and ways of working, without fully thinking through the potential implications and consequences	43%	50%	30%	43%	49%

The blind are leading the slightly less blind

Owing to the speed with which advances in AI has caught leaders in many industries by surprise, there are concerns that the leaders of our industry do not have a strong enough understanding of the technology. Only just over two in five (41%) think industry leaders have a strong understanding of AI, and the result is similar when looking specifically at the understanding of generative AI (39%). Considerable variances exist between regions, with leaders in Asia Pacific perceived to be the least prepared overall.

This is confirmed when looking at the general levels of understanding of AI among communications professionals across the industry. Globally, at best less than one third of communicators feel they have a strong understanding of AI terms and technologies. That falls to 13% or under for some of today's hottest technologies such as DALL-E (13%) and Stable Diffusion (9%).

Leaders' grasp of AI

	Industry Leaders Have a Strong Understanding of AI	Industry Leaders have a strong understanding of Generative AI
Global	41%	39%
Middle East and Africa	61%	50%
North America	47%	40%
Europe	41%	43%
Asia Pacific	25%	24%

Quite consistently across all AI terms and technologies, the more junior members of the industry are revealed to have greater levels of understanding of these, demonstrating the need for industry leaders to ensure they keep junior team members engaged and create opportunities for reverse mentorship where possible.

Understanding of AI by level

AI Technology	%	Management Level	Director Level	Manager Level	Executive Level
Artificial Intelligence (AI)	31%	31%	32%	27%	36%
Machine Learning	26%	20%	19%	27%	37%
Deep Learning	16%	11%	21%	14%	21%
Data Analytics	34%	33%	33%	21%	42%
Natural Language Processing	22%	20%	26%	21%	22%
Generative AI	23%	19%	33%	17%	28%
ChatGPT	25%	20%	35%	26%	26%
Bard	12%	11%	4%	13%	17%
Midjourney	13%	7%	16%	9%	22%
DALL·E 2	13%	11%	11%	8%	23%
Stable Diffusion	9%	6%	5%	9%	16%

Bridging knowledge gaps is critical

Given the knowledge gaps, investments in education and training will be critical for the communications industry to maximise the opportunities AI presents while managing the risks.

Nearly half of our respondents (49%) do not believe their company is doing enough to educate its employees about AI and how it will impact the industry. The same number also say their employer is not doing enough to educate them about the governance and ethical risks surrounding AI technologies.

To quantify this, more than seven in ten (71%) say they would like more training around AI technologies as they relate to communications while 61% think their employer should be investing more time and resources into integrating AI technologies into standard practices.

Training for the future

Before diving into execution, communications agencies and professionals are urged to focus on training to understand the landscape, its complexity and impact, as well as to learn to work differently alongside its future non-human peers. Recommended training topics include:

- **AI Basics:** A '101' to understand the long history of AI, its essential concepts and applications.

- **AI Use Cases:** Understand the role (generative) AI can play in day-to-day tasks such as content writing, creative concepting, media monitoring, and crisis management.

- **Tools & Prompting:** Learn to use the right tools for the right task (content, creative, ...), and how to get the best out of them through effective prompt engineering.

- **AI Ethics:** Understand what responsible AI usage means and its key principles and practices.

Training across the board is sparse

While over half (55%) have participated in some form of training related to AI technologies, training approaches have not been comprehensive with only 17% and 10% participating in training around managing fake news or information sources and identifying deep fake content respectively.

Respondents in North America (73%) are least likely to have participated in any form of AI training, a reflection of a trend reported earlier in this report where people in this region were noted to feel the least positively towards AI.

45%
I haven't participated in any training around AI technologies

29%
AI technology

24%
Generative AI tools

18%
Responsible use of generative AI tools

17%
Managing fake news or fake information sources

10%
Identifying deepfake content

The horse has bolted - AI is already changing how we work

Despite the lack of knowledge and training, and the concerns around managing risks, across the world, a sizeable majority (61%) of communicators are already using generative AI tools in their day-to-day work, with one in five (21%) using them frequently.

For those already using AI in their roles, globally nearly half (47%) of those using AI technology are using it to speed up and improve their approach to desktop research. Allied to this is a further 39% using the technology to help analyse data. However, generative AI is also already being used by many for the more creative aspects of communications with 42% using it to help generate creative ideas, 38% using it for social media content generation and just over a third (34%) applying the technology to writing articles.

Surprisingly, those at Management and Director level are currently nearly twice as likely as those at the most junior Executive levels to be using generative AI for desktop research. They are also more likely to use it for creative idea generation than junior staff. This is likely to be a function of senior employees taking a more prominent role in strategic advisory work. As an AI tool, data analysis and visualisation seem to be favoured by more junior staff, perhaps reflective of these employees spending more time analysing and processing raw data.

Overall, human connection still remains important for communications professionals as AI does not feature strongly when liaising with journalists and clients. However, notably more junior staff are taking advantage of AI technologies for these purposes than senior employees.

How AI is being used in communications today

|	Tasks currently using AI technologies for	Management Level	Director Level	Manager Level	Executive Level
Desktop research	47%	63%	75%	32%	37%
Creative idea generation	42%	43%	70%	35%	40%
Data analysis	39%	44%	25%	35%	44%
Social media content creation	38%	54%	40%	22%	39%
Writing articles	34%	43%	50%	22%	32%
Transcriptions	29%	40%	45%	14%	26%
Data visualisation	27%	29%	15%	17%	40%
Key messaging	25%	22%	35%	19%	30%
Media monitoring	24%	29%	10%	24%	23%
Writing press releases	23%	27%	35%	21%	18%
Graphic design	23%	21%	30%	25%	21%

Looking to the future, adoption is set to climb rapidly. In six months nearly nine out of ten (89%) predict that AI tools will be used weekly, with more than a quarter (27%) expecting to use these daily. Looking two years ahead, almost everyone (92%) thinks AI technologies will be a regular part of their toolkit while 43.1% believe they will be using these daily.

There are some clear areas where communications professionals would like to apply AI. This tends to focus on what might be considered some of the more data and research focused tasks such as data analysis, data visualisation, desktop research and transcriptions. Preparing PowerPoint presentations and media monitoring also ranks highly, followed by creative skill sets.

Interestingly, despite creative idea generation, writing articles and social media creation ranking highly for current use, these do not rate as highly as areas where help is wanted.

Usage projections

Within six months	Within one year	Within two years
89% Weekly use	**90%** Weekly use	**92%** Weekly use
27% Daily use	**32%** Daily use	**43%** Daily use

Tasks would like to see AI technologies improve

Data analysis	56%
Data visualisation	47%
Desktop research	45%
Transcriptions	45%
Preparing PowerPoint presentations	41%
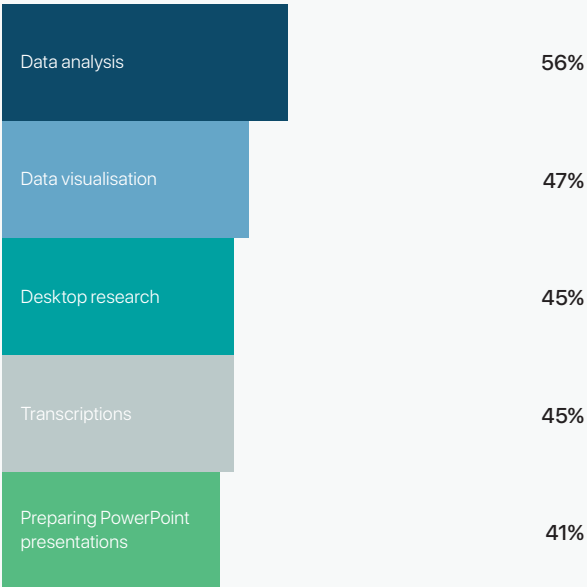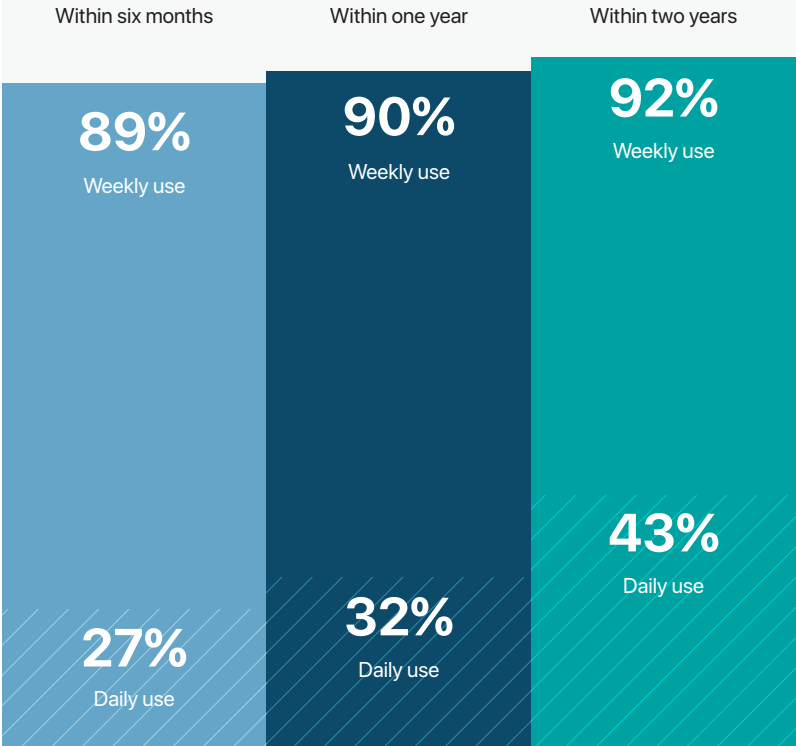
# *Communications leaders of the future will be defined by how soft they are*

With the forecast changes to day-to-day tasks, insight and people-based skills will become even more important. 84% of practitioners think team management and leadership will be more important in the future than they are today. This reflects the importance of 'soft skills' such as emotional understanding and empathy which only humans can truly deliver.

There is also a belief that strategic advisory and creative thinking (both at 83%) will be more important in the future, underlining the scepticism many still see in the capacity of AI to deal effectively with higher value tasks.

These findings also underscore the point that AI will not replace people nor jobs, but tasks. The critical thinking – as well as the soft skills – required in many parts of our roles cannot yet be replaced by technology. Instead, we are likely to see time-consuming tasks undertaken by AI, leaving humans with more time to spend on added-value work. It also highlights just how valuable those that can leverage AI will become in the communications job landscape.

AI usage in the future

	More important than today	Less important than today
Team management / leadership	84%	16%
Strategic advisory	84%	16%
Creative thinking	83%	17%
Relationship building / networking	82%	18%
Verbal communication	78%	22%
Design capability	66%	34%
Written communication	65%	35%
Prompt writing	63%	37%
Data analysis	62%	38%
Technical skills, e.g. Coding	60%	40%
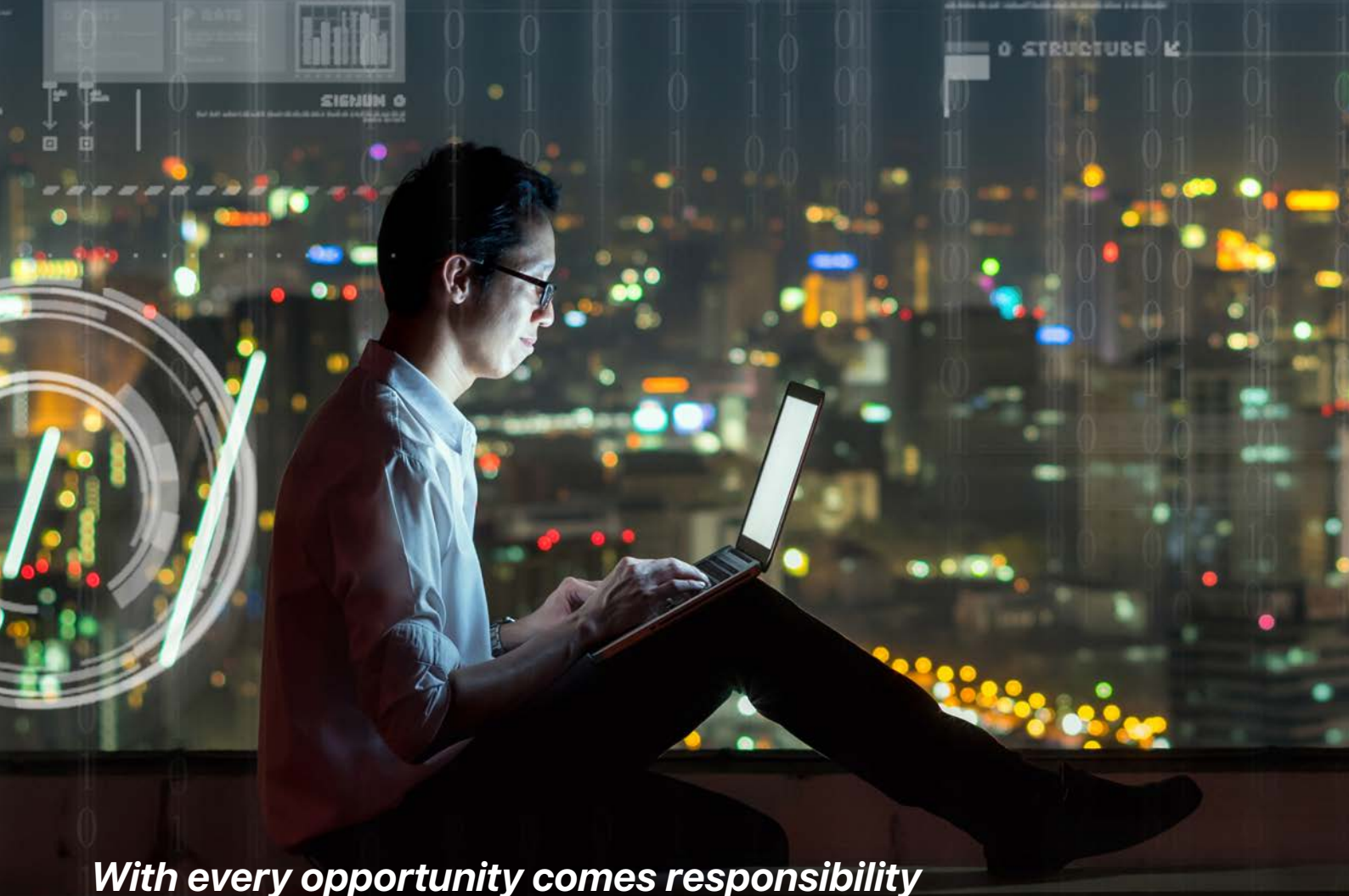
With every opportunity comes responsibility

While positivity abounds across the findings of this study, our research also highlights genuine concerns about the potential legal and ethical risks AI and generative AI specifically pose. The key risk most see is around legal and ethical issues thrown up by the use of generative AI technologies. This is a concern for nearly nine in ten (85%) respondents.

Nearly two-thirds (63%) see AI representing a governance risk with those in Asia Pacific most concerned at 65%, but only just over two in five respondents from the Middle East consider this a risk.

Much of the ethical and legal challenge is around the accuracy, transparency, accountability, and privacy of the content generated by AI. Think of the risks around Intellectual Property (IP), mis/disinformation, discrimination, defamation, bias, data privacy, or cybersecurity. In the coming months and years, with

deception becoming far cheaper and more prevalent, we can imagine the ramifications when anyone can effortlessly create falsified content. Reputational sabotage is nevertheless just the tip of the iceberg.

Our legal and regulatory frameworks are still largely catching up with the fast-developing technology, although progress is being made. For example, the European Union (EU) is attempting to include generative AI in its upcoming AI law, the AI Act. For businesses, much of the legal perspective comes down to transparency: being transparent in the providers or tools they work with, how the platforms they leverage make decisions and use or interpret data, and where the input data comes from.

Despite these governance concerns, currently only 11% have policies or guidelines in place for using generative AI tools, and a further 35% have plans to do so within the next 12 months.

Laying the foundations:
A robust internal policy

A robust internal policy for generative AI is essential for communications agencies and clients to use the technology responsibly while upholding ethics and efficiency. Doing so will provide a solid foundation for agency-client partnerships moving forward. A good policy should:

- Offer guidance for employees to safely use (generative) AI within established limits.
- Clarify data usage and ownership, and safeguard company, personal, and client data.
- Set clear procedures to avoid publishing incorrect or harmful content.
- Ensure generative AI implementation includes human oversight.
- Define roles and consequences for noncompliance or unethical AI use.
- Be regularly assessed and refined based on technological advances and societal changes.
- Be leadership-led and part of the board's agenda to showcase solid, long-term commitment.

Do you have policies in place to manage AI use?

	Global	Asia Pacific	Europe	North America	Middle East and Africa
Yes – We have this already	**11%**	1%	12%	14%	5%
Yes – This is being developed and will launch in the next 6 months	**18%**	8%	19%	19%	17%
Yes – This is being developed and will launch in the next 12 months	**17%**	11%	19%	19%	33%
I'm unsure	**18%**	41%	13%	11%	17%
No – There are no plans currently in place	**36%**	39%	37%	37%	28%

With every responsibility comes the need for transparency

With increased governance risks looming there is a strong feeling that pressure will start to come from procurement around agency use of AI on behalf of clients.

Nearly three quarters (73%) believe procurement processes will start to include questions around this area and there is an interesting diversity of opinion about whether agencies should declare their use of AI.

The strongest contingent (31%) believe that the use of AI should be declared every time it is used with a further one in five going a step further to say it should be part of the legal agreement between client and agency. Overall, a combined 79% agree that some disclosure requirements area appropriate.

Should agencies be transparent about AI usage

|	
I do not think it is relevant. Agencies should be expected and trusted to manage risks	**19%**
Yes, I think this should be declared for all pieces of work	**31%**
Yes, I think this should be declared, but only where the work relies on the sourcing of third-party data or creative idea generation or execution	**10%**
Yes, I think this should be declared, but only where the work relies on the sourcing of third-party data	**17%**
Yes, I think this should be part of the legal agreement between client and agency	**21%**

The big question:
Who owns the data?

Views are deeply split. While the biggest contingent (36%) believe that the user should retain ownership, a further quarter (23%) think ownership is to be jointly shared between the users and the tool provider. Resolving the intellectual property rights question could have significant long-term ramifications for our industry.

Only **36%** believe that the user should retain outright ownership.

Absent of human creative effort, a work should not be entitled to copyright protection	**13%**
Ownership of this should be jointly shared between the user and the tool provider	**23%**
The author of the original source of content the AI tool derived information from should own this	**14%**
The provider of the tool should own this (e.g. OpenAI)	**14%**
The user should own this	**36%**

Data ownership views by region

Asia Pacific
79%

North America
62%

Europe
62%

Middle East and Africa
61%
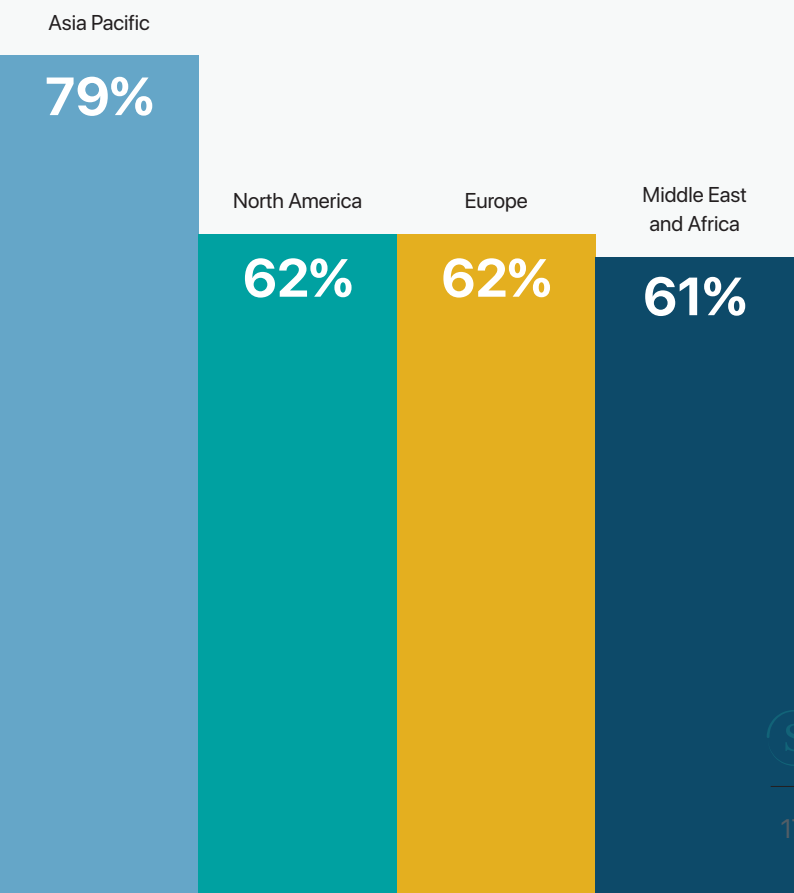
There are similar concerns around the issue of data ownership. Two-thirds (66%) expressed their alarm at the risks AI could pose, with those in Asia Pacific most worried (79%) and respondents in Middle East and Africa least worried (61%). These concerns are reflected in a relatively widespread set of views on who retains ownership rights of content produced using AI tools.

AI can offer new opportunities for agency-client relationships

For most, there is no doubt that AI technologies can positively enhance client-agency relationships. Over half believe that to be the case although – again reflecting the embryonic nature of AI in the communications industry – over a quarter are on the fence for the time being.

Half also think that AI will create a greater need for agency support as businesses deal with the challenges it poses. Again, there are a good number (34%) who are undecided about whether inhouse clients will need more or less support.

Fees are an interesting area for many in considering how AI will impact the client-agency relationship. More than half (53%) of our respondents believe agency fees may rise to fund investment in technology. A not dissimilar number (56%) believe that if AI can enable agencies to be more efficient, then those cost savings should be passed onto clients in the form of fee reductions.

55% believe AI technologies can positively enhance client-agency relationships.

53% believe agency fees may rise to fund investment in technology.

56% believe that if AI can enable agencies to be more efficient, then those cost savings should be passed onto clients.

There is also general agreement that AI can level the playing field between agency partners.

Approaching two-thirds of respondents (61%) feel that AI has the potential to allow even the smallest agencies to compete more effectively with their behemoth cousins. Whether that is through a broader set of service options facilitated by AI or using the technology to be nimbler is still to be seen.

Well over half (57%) also feel that AI has the potential to allow agencies to compete more effortlessly in markets where they do not currently have operations. This is largely inspired by the natural language capability AI possesses, but there are clear red flags here for agencies prepared to entrust translation to AI without layering human oversight.

There are similar concerns for the three in five respondents (61%) who feel AI has the potential to reduce the barriers for non-native speakers of an official in-market language. Trusting AI to deliver nuanced copy is likely a step too far at the moment, while remaining a real possibility for the future.

Levelling the playing field for agencies?

The efficiencies created by AI technologies have the potential to level the playing field between agencies of different sizes	**61%**
AI technologies have the potential to level the playing field in our industry between native and non-native speakers of the official language in a market	**61%**
AI technologies have the potential to level the playing field between different kinds of agencies – e.g. enabling communications agencies to produce better creative	**61%**
AI technologies have the potential to level the playing field between agencies based in different markets	**57%**
AI technologies can level the playing field can level the playing field between consultants of different levels, backgrounds, skills and experience	**48%**

Three out of five respondents also believe that AI has the ability to level the playing field between agencies focused on different communications or marketing skills, for example public relations agencies competing more effectively with advertising agencies using the idea and content generation capabilities of AI, and vice versa.

There is, however, a note of warning that AI could create marked discrepancies between different jurisdictions. China, for example, does not allow access to ChatGPT potentially putting teams at a disadvantage to those able to use AI tools. That said, similar technology from major Chinese technology firms such as Baidu may offer local solutions.

Investments now may unlock value later

Investing in AI presents a number of opportunities for communicators. Employers that deliver on employee engagement around AI stand to take a competitive advantage. Nearly six in ten (59%) communications professionals think that a company that is actively incorporating AI technologies appeals as a place to work.

However, at the moment, 70% say their employer is either not planning to use AI technologies in the way it operates, or they are unsure if they are.

Aligned with this, 61% believe their company should be investing more time and resources into integrating AI technologies into how we work. For most they also see that this presents as a business opportunity, with well over half (59%) believing that clients will soon be asking for help to manage their AI-generated reputation.

Reputation Management in the age of AI

We now live in an age where the proliferation of misinformation and disinformation seems endless. (Generative) AI provides even more effective tools for bad actors to create and disseminate non-factual or entirely false content. Yet, by enhancing the mechanisms to plan and execute an effective crisis plan, companies, and their partners, can remain ahead of the curve.

These steps include:
- Defining and implementing a clear strategy and process to fight disinformation and taking a proactive stance toward digital reputation management and reputation capital building.
- Employ AI tools and human judgment to quickly identify, analyse, and monitor threats.
- Building and maintaining strong connections with reliable media sources and influencers to help counter harmful content.
- Establish swift response protocols that establish credibility and trust.
- Actively leveraging owned brand properties (website, social media, etc.) for content distribution and real-time communications.

ChatGPT's view on our future

We asked GPT-4 to write a 5-sentence paragraph on how it sees the future of the communications industry and the role humans will play in a world where AI has 'human-level' skills. What it told us was:

"In the future, AI and human corporate communications professionals will collaborate closely, with AI handling data-driven tasks and humans providing creativity and empathy. Working together, they'll create personalised and targeted content that aligns with company values. AI will offer real-time insights, helping humans make informed decisions and adjust strategies. During crises, AI will identify potential issues, while humans craft appropriate responses. Human professionals will ensure AI-generated content remains ethical and empathetic."

Regional spotlights

From the results, we have identified key trends in the three regions with the greatest spend on communications: Asia Pacific; Europe; and North America.

Asia Pacific

More positive about opportunities: Our respondents in Asia Pacific are more positive about the opportunities generative AI offers. Nine in ten (90%) are optimistic, compared to the global average of 86%. They are particularly positive about the technology's ability to create efficiencies so that more time can be devoted to strategic thinking (61% compared to 43% and 47% in Europe and North America respectively).

Low understanding of the implications of AI: At one in four (25%), Asia Pacific has the lowest proportion of communicators who have a strong understanding of the implications of machine learning and AI technologies. This compares to the global average of 41% and a regional high of 67%. A comparative number (24%) have a similarly low understanding of the implications of generative AI.

There are particular concerns about data ownership: While our Asia Pacific respondents have concerns about the regulatory, ethical, and legal issues resulting from the use of AI technologies, at 79% APAC has the highest percentage of those who worry about the risks connected to data ownership. This is nearly 13% higher than the global average.

Implications for client-agency relationships: Over half (52%) of those who practice their trade in APAC expect AI will enhance the relationship between agencies and clients while half (50%) also expect to see downward pressure on fees.

Europe

AI is in widespread use already: More than seven in ten people (71%) are using AI technologies at least once a week, with less than two percent (2%) saying they never use it. Looking ahead, over 92% think they will use AI once a week or even more frequently.

Split between whether leaders are acting at the right pace: While communications professionals across Europe show a similar level of understanding of the implications of AI as their colleagues around the world, there is a clear split on whether leaders are moving at the right pace. 56% believe they are moving too quickly.

Low incidence of policies and guidelines: Like most regions and professionals globally, European communications professionals are concerned about potential legal and ethical issues stemming from generative AI technologies. Despite this, only half (50%) of companies has or expects to have introduced policies and guidelines for using generative AI tools.

North America

Lowest rates of optimism about AI: While most respondents in North America see AI as an opportunity rather than a threat, they were the least optimistic about the technology at 82%, some way below the most optimistic region, the Middle East and Africa. This may be connected with the much higher usage of AI than other regions, with well over nine in ten (94%) using it weekly and almost three in ten using the technology daily.

Low levels of understanding of the implications of AI: Despite having the highest percentage of regular users, less than half of North American professionals believed they have a strong understanding of the implications of machine learning and AI technologies (46%) for the industry and even less (40%) for generative AI.

AI output belongs to the user: North American communications professionals are most likely to view the user as the owner of content developed using generative AI, with two out of five (41%) viewing it as such. Other regions are much more split (32% in Asia Pacific and 30% in Europe, and overall global average of 36%).

Recommendations

Senior leaders need to get to grips with the technology
A clear message from our research is that most believe the leaders of our industry do not understand AI well enough. Leaders need to buckle down and spend time understanding how the technology works, how it could be used in the communications industry and get to grips with the risks it poses.

Corporate comms teams and agencies need to put in place SOPs to manage risks
Very few organisations have policies in place to manage the risks AI, and in particular generative AI pose. This needs to change immediately if we are to avoid a storm of legal and ethical trouble in the next 18-24 months.

Inhouse and agency teams need training STAT!
Our research contains a clear cry for help from communications teams across the world for training. Few have had training about using AI tools and many are making things up as they go. Even fewer have had training on the legal, ethical and governance issues thrown up by the use of AI. The lack of training is clearly a result of leaders not getting to grips with the technology but that needs to change in the next three to six months.

HR teams need to plan ahead to ensure teams have the right skills
As with all major inflection points to our industry, there are significant implications for the skill sets communications professionals of the future will need. HR teams need to be both proactive and creative in ensuring they can find the right people in the future.

Agencies and inhouse teams must work together
The arrival of AI into our industry needs agencies and inhouse teams to unite to understand how the technology can transform the work being done. Both sides of the relationship should be involved in discussions about learning and education, managing governance and data ownership risks and how the technology may affect the future of the relationship. Siloed thinking will likely lead to problems down the line.

Experiment! Explore a wide range of generative AI tools
While there is clearly a significant cohort of people already using generative AI, we would encourage everyone to experiment with the tools available. Take time to identify ways AI can help generate copy, video, and audio, understand its strengths and weaknesses, and how they could play a role in the future.

Demystify some of the hype around the topic and tools, as an individual and as a team
Given the nature of our industry, it is perhaps not surprising that AI has created a storm of interest, and hype. It is critical, though, that we all take time to understand what AI is really about and pass on that knowledge – without the hyperbole – to our colleagues. That will help us avoid rushing over a cliff of risks while embracing a technology we know is here to stay.

Conclusion

The arrival of any transformative technology can be challenging. In recent decades we have seen how PC technology, the arrival of the Internet, and the rise of the mobile handheld device, transformed virtually every business in every sector globally, despite misgivings at the outset. In the early 2000s social media changed the way we communicate with the arrival of smartphones and social on the go that brought an entirely new dimension to our lives.

The arrival and democratisation of generative AI brings with it both a sense of optimism about what it can deliver but also an unease that reflects our concerns about the role 'machines' will play in the future.

Our research underscores the point that most think AI will be beneficial to our industry, and that few have concerns about being replaced by technology. They are instead hopeful that AI can take on the more boring and mundane tasks such as data analysis and research.

These are ideally suited to the technology and it can deliver results that are the equal of many executives. It is worth remembering, though, that new generations of tools are able to create copywriting and design work that moves generative AI away from just being a tool to help with the mundane into genuinely valuable contributions to the wider delivery of communications.

While many are already using generative AI in their day-to-day roles to take on these types of tasks, there is also recognition that AI should not be used in many areas of the communications function. These primarily revolve around the soft skills needed in managing teams and engaging with clients.

While views on how AI could be best used on a day-to-day level are relatively cohesive, there are worries about whether senior industry leaders know enough about the technology to create action plans to make that happen. There are concerns, too, that leaders do not really understand the wider ethical, governance and data ownership risks presented by the use of AI.

The glacial pace of senior leaders is a key reason why many do not feel there is adequate AI training, either on using the technologies themselves or coping with the risks it throws up.

There are worries too that AI will fundamentally alter the relationship between clients and agencies. Some feel it offers an opportunity to move outside of their traditional 'swim lanes' and be able to deliver work in different disciplines or geographies. Others think that there will be significant pressure on agency fees when procurement departments fully understand the time-savings possible using AI technology.
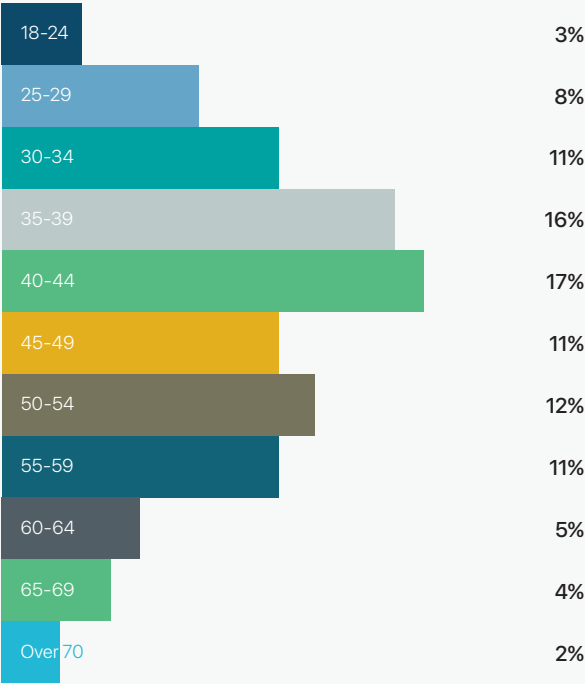
2023 will be a seminal year for many industries as they integrate AI into their normal business practices; the communications industry will be no different. For those willing to embrace this brave new world, there will be major opportunities; those that continue to drag their feet may face a nightmare in years to come as they try to make up for lost time.
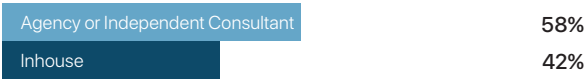
Methodology

The findings are based on a global survey carried out in March 2023. 406 communications professionals, covering every corner of the globe and representing every size of business, responded.

Age

18-24	3%
25-29	8%
30-34	11%
35-39	16%
40-44	17%
45-49	11%
50-54	12%
55-59	11%
60-64	5%
65-69	4%
Over 70	2%

Agency vs inhouse

Agency or Independent Consultant	58%
Inhouse	42%

Market

Asia Pacific	23%
Europe	26%
Middle East and Africa	5%
North America	42%
Other Markets	4%

Job title

Management level	30%
Director level	14%
Manager level	32%
Executive level	24%

Glossary

Artificial intelligence (AI): A field of computer science that involves developing algorithms and models that can perform tasks typically requiring human intelligence, such as learning, problem-solving, and decision-making.

Machine learning (ML): A subset of AI that involves training machines to learn from data and make predictions or decisions, without being explicitly programmed to do so.

Deep learning (DL): A specialised type of machine learning that mimics the behaviour of the human brain and enables machines to train themselves to perform tasks.

Natural Language Processing (NLP): The ability of computers to analyse, understand, and generate human language.

Generative AI: The use of AI techniques to generate new content, such as images, text, or audio, which did not exist before. It involves training models on a large dataset and then using them to generate new content that is similar to the original data.

Synthetic media (or generative media): Visual, auditory, or multimodal content that has been created or modified, commonly using AI techniques.

Deepfake: A technique that uses deep learning to create fake images or videos that look real, by replacing a person's face, voice or body with someone else's. It poses major ethical concerns due to its potential misuse.

AI Ethics: The ethical considerations and implications of developing and deploying AI systems, involving issues such as bias, transparency, privacy, and the impact of AI on society.

ChatGPT: A generative AI large language model (LLM) developed by OpenAI that is trained on a massive dataset of text and can generate responses to a wide range of prompts, making it useful for chatbot applications and other natural language processing tasks.

Midjourney: A text-to-image AI program that can be accessed via Discord. It generates images via 'prompts', similar to popular tools such as DALL-E and Stable Diffusion.

About Sandpiper

Sandpiper is an award-winning strategic communications and public affairs consultancy based in Asia Pacific and operating globally.

We use our shared experience to make sense of the challenges our clients face in times of change.

We draw on rich, data-driven insights and research to inform our advice and deliver measurable value.

We work as a single, global team, with one P&L. This allows us to serve our clients flexibly wherever they are in the world.

Our team are trusted advisors to industry leaders and market disruptors. We combine strong regional market understanding with global perspectives. Our deep specialist knowledge in the **technology**, **finance**, **health**, **professional services**, **consumer brands** and **energy and environment** sectors ensure we understand the challenges our clients face, can think creatively about their issues, and shape communications to achieve their business goals.

In 2022 Sandpiper was awarded Internal Communications, Non-profit, Education and Public Health Campaigns by PR Awards, Financial Communications & Thought Leadership by The Gold Standard Awards, Best Insights-driven PR & Best Employee Engagement/Internal Communications by PR Awards. In 2023, Sandpiper was awarded Large Agency of the Year for Asia Pacific by the Public Relations & Communications Association (PRCA).

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