



FLEISHMAN
HILLARD

Understanding the hopes,
fears and ambitions of
communications and
marketing decision-makers

Created by FleishmanHillard UK

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Will gen AI change the game?



Understanding a new era

Few people had heard of generative AI this time last year, but since OpenAI's ChatGPT launched in November 2022 it has generated an incredible amount of attention. In our world, this has raised question after question about what this new technology means for the future of PR, marketing and communications.

At FleishmanHillard, we've spent much of the past year trying to understand just that. We've looked to meet this new technology head-on and get to grips with it so we can begin to build an approach and set of policies for how generative AI can support our work, especially when it comes to how we can provide the best consultancy to our clients, as well as where the guardrails should be.

Generative AI and other next-generation technologies like business process automation's (BPA) recent depiction in the media hasn't always been conducive to a clear appraisal of their impact on communications – or any other industry for that matter. If you believe much of the press coverage, smart machines not only threaten to do many of our daily tasks faster or smarter than we can, but they can generate content and even be creative, placing a target on jobs that currently demand a wide range of specialist skills.

Debunking this narrative is in our hands – it's up to us all to understand these technologies as best we can. That means using them, within organisational guidelines of course, figuring out how they work and experimenting safely so we can see what they are – and what they aren't – for ourselves. It also means keeping on top of developments in this fast-moving space and finding credible sources of information to help us separate hype and fearmongering from reality.

Generative AI's ability to create images, audio and video at scale – with the quality of this output improving literally every day – means that individuals, groups and even states will choose to use it to create damaging disinformation. And we are already seeing high-profile copyright cases focusing both on who owns the output from tools like ChatGPT and whether these large language models (LLMs) have been trained on illegally acquired data sets.

The emergence of generative AI, therefore, adds a whole new dimension to managing brand reputation and widens the threat landscape. As communications professionals, we cannot risk being outpaced by the technology and confronted with a reputational situation we simply don't understand.

After all, it is now almost a year since generative AI hit the mainstream and the technology cycle is starting to mature. In addition to the legal cases mentioned above, we have seen the emergence of ChatGPT rivals, including Google's Bard and Facebook's RoBERTa. Organisations in diverse sectors are starting to find ways to put it to work, including hospital operator HCA Healthcare's proof-of-concept "handoff" app, which pulls conversations, handwritten notes and electronic medical record data at the end of a shift into one digestible summary for the incoming nursing team.

The transformation promised by these technologies is starting to happen. With that in mind, we believe it's the perfect time to gain a better understanding of how marcoms professionals think and feel about generative AI and BPA – as well as whether their organisations are beginning to use these technologies, and adjusting their policies, hiring and training plans accordingly.

To put together this report, FleishmanHillard surveyed marcoms professionals at leading UK companies in the automotive, energy, financial services, FMCG, healthcare, manufacturing and technology industries, as well as conducting similar surveys in France and Italy.

The findings are, overall, heartening. They show a marcoms world that is generally choosing optimism over fear, approaching this change with an open mind rather than burying their heads in the sand. There are some watchouts and we clearly still have a long way to go, but communications is certainly working to meet the challenges and opportunities these technologies present.



James de Mellow








Director, Technology,
FleishmanHillard UK



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The results of this report are based on a 21-question survey fielded among n=200 senior decision-makers working in communications, PR, or marketing roles within large companies* in the UK. The research was run by TRUE Global Intelligence in partnership with Vitreous World, and fieldwork ran from 27 June - 11 July 2023.

Quotas were put in place to ensure a representative sample of decision-makers from each of the following industries:

-  **Automotive**
-  **Energy**
-  **Financial services**
-  **FMCG**
-  **Healthcare**
-  **Manufacturing**
-  **Technology**

Respondents were also tracked for age, company size and time spent in current role.

N.B.: throughout this report all comparisons made between audience groups (e.g. age groups, industries) are statistically significant. Due to rounding not all figures shown may add up to 100%.

**Large companies are defined as those with 200 or more employees.*

TRUE Global Intelligence also conducted similar surveys with a near-identical methodology in France and Italy during the same time frame.

Disclaimer:

This communication is offered as general background and insight as of the date of publication, but is not intended to be and should not be taken as legal advice. Each organisation should confer with its own legal counsel and its own business and strategic advisors for guidance that is specific to and considers the organisation's status, structure, needs and strategies.



Executive summary

Our research reveals that marcoms decision-makers in the UK are open-minded about generative AI. They have started using it, they are more inclined than not to see the positive changes these technologies could bring, and they are beginning to coalesce around some key areas and issues to focus their attention on.

Generative AI is here – but we need to bridge the regulation gap

70% of marcoms decision-makers are already using generative AI or BPA at work – but 67% say their business has no training materials for the use of these technologies in place and 65% say their business has no policies or guidelines for generative AI or BPA.

Early adopters are looking to find efficiencies

Gathering intelligence and streamlining workflows are the most popular use cases for generative AI and BPA – both selected by 44% of respondents. We should still be concerned, however, that **16% have used these technologies for asset creation** (either image, video or audio), and **12% have created a press release or other written content** – particularly when most businesses do not have training or guidelines in place.

The impact on jobs is still unclear

Just 23% of respondents plan to reduce headcount because of these technologies, but **75% believe that the impact of generative AI and BPA will eventually lead to some kind of job displacement**.

Marcoms professionals are trying to stay positive

When asked how they feel about generative AI and BPA's impact on the delivery of marketing, PR or communications, **93% responded with NET positive sentiment**, compared to 75% responding NET negatively.

There is an awareness of a new corporate reputation paradigm

Four out of 10 respondents believe that their organisations could likely face various reputational threats over the next two years because of these new technologies, with **concern highest for the impact on company culture (43%), and wider industry disruption (43%)**.

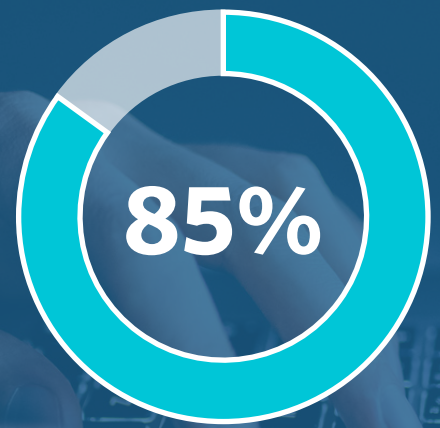
The age of generative AI

Our research is clear about one thing - generative AI and BPA have well and truly arrived, and marcoms professionals are using them for a range of tasks and as part of their regular suite of tools.

In fact, **85% of respondents said that these technologies are already used on a daily or weekly basis in their departments** - a figure that is the same in Italy but a little lower at 73% in France.

As individuals, **70% of marcoms decision-makers in the UK use generative AI and/or BPA at work**, with 86% saying that they know "a lot" or "something" about the technologies. These early adopters are also beginning to see some advantage from their efforts, with respondents with "a lot" of knowledge likelier than those with "some" or "not a lot" to say that generative AI and/or BPA have made their roles easier.

However, while this sense of engagement and enthusiasm is heartening, **66% of marcoms decision-makers say their company has no training materials in place on the use of generative AI and BPA**, while **64% have no policies or guidelines in place**. While the situation is moving - 51% and 50% say guidelines and training materials respectively are currently being drafted - this is an urgent area for future focus. The direction of travel, though, is clear. With all UK respondents (as well as all those in France and Italy) whose businesses currently don't use these technologies saying they plan to incorporate them in the next 12 months, we will soon be living in a world where generative AI and BPA are just another part of a marcoms professional's toolkit.



of respondents said that these technologies are already used on a daily or weekly basis in their departments



Kate Russell,

technology journalist, educator and author

"This research shows there are still a lot of unanswered questions about AI & BPA. Marcoms decision-makers are wise to be cautious about relinquishing too much creative control to generative AI models, while still experimenting with the possibilities. The future is yet to be written, so now is the time to think carefully about how we integrate these exciting new technologies into the workflow."

The generative AI use cases

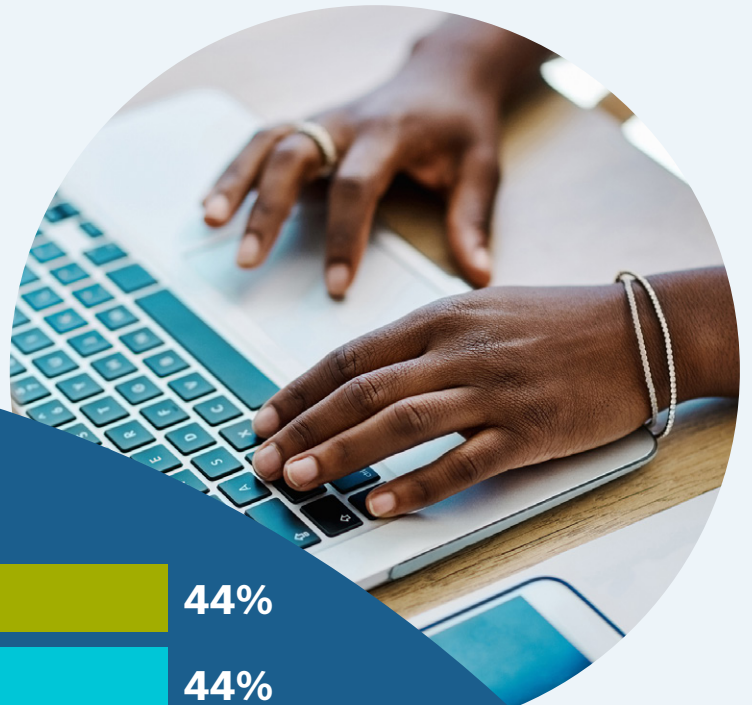
Of course, not all generative AI or BPA functions are equal – applications and use cases have different levels of effectiveness, integration and, crucially, risk profiles.

In these early months, research- and efficiency-based tasks dominate, **with gathering market intelligence (44%) and streamlining workflows (44%)** the most popular current use cases for marcoms decision-makers – these were also the two most popular responses from our research in both France and Italy. **Content ideation (39%), predicting customer behaviour (37%) and optimising programmatic advertising (35%)** are other popular early functions – potentially speeding up or adding another layer of confirmation to existing processes.

These early patterns align with **81% of respondents believing that these generative AI and/or BPA will lead to more streamlined workflows** – providing them as marcoms leaders with more time to focus on management and relationship-building. Such is the level of expectation that **79% also believe it will lead to increased productivity** and more time to identify new opportunities. Clearly, marcoms decision-makers are setting the bar high.

Far fewer respondents are using generative AI and BPA for creative and content – but the fact that **16% have used these technologies for asset creation** (either image, video or audio), and **12% have created a press release or other written content**, should raise alarm bells. This is even more serious in France, however, where the asset-creation figure rises to 23%.

Without company training or policies in place, organisations leave themselves far more open to the reputational and legal risks that come from generative AI-created content potentially entering the public domain under their name. And marcoms professionals should think very carefully about the risk profile before creating brand content using these tools – and always abide by their organisation’s generative AI policy if one exists.



Generative AI or BPA is currently used for:



The jobs question

We have discussed marcoms decision-makers' positivity about these technologies' potential to free up their time for more meaningful tasks, but what about the regular media prediction that generative AI and BPA will upend the world of work and put tens of thousands of us out of our jobs?

The early signs are positive, with just **23% of respondents planning to reduce headcount** because of these technologies. On the other hand, **75% believe these technology trends will eventually lead to some kind of job displacement**, with 45% stating this is "highly likely". By comparison, these views are shared by 76% and 45% in France, and 77% and 45% in Italy.

However, there is also a consensus that generative AI and BPA will change the kinds of roles marcoms teams require, with **63% planning to hire AI- or data-specific roles** to their departments and **79% anticipating a significant shift in their own job role**. Plans to hire AI- or data-specific roles are broadly similar in France (59%) and Italy (61%).



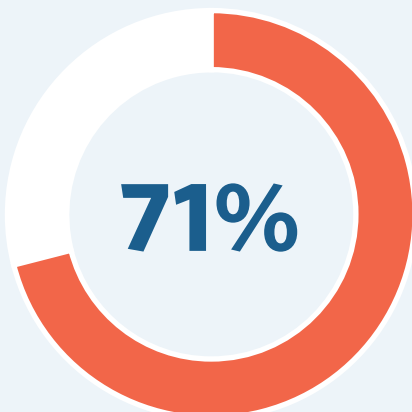
63%



plan to hire AI- or data-specific roles to support their departments



Charles Proctor,
Managing Consultant, Credera UK



believe wider adoption of AI/ BPA technologies will likely lead to their department's budget being cut

"Marketers are expressing an interest, but their creative use of generative AI is limited, mainly automating internal processes and marketing intelligence, with some initial attempts at ideation.

The marcoms opportunities lie in creativity, contact management, real-time data insights, and personalisation.

Generative AI should be considered a tool, with careful selection of use cases, trials, and A/B testing. It can save time in copywriting, analytics, chatbots, and content personalisation and summarisation. However, if it is misused, either by accident or intentionally, it poses threats to reputation, privacy, and bias, necessitating strong governance and expertise."

Understanding the emotions of AI

The discussion around the impact of these technologies on jobs and the world of work cannot be removed from the emotions of the situation – how we instinctively think, feel and react to new tools like generative AI.

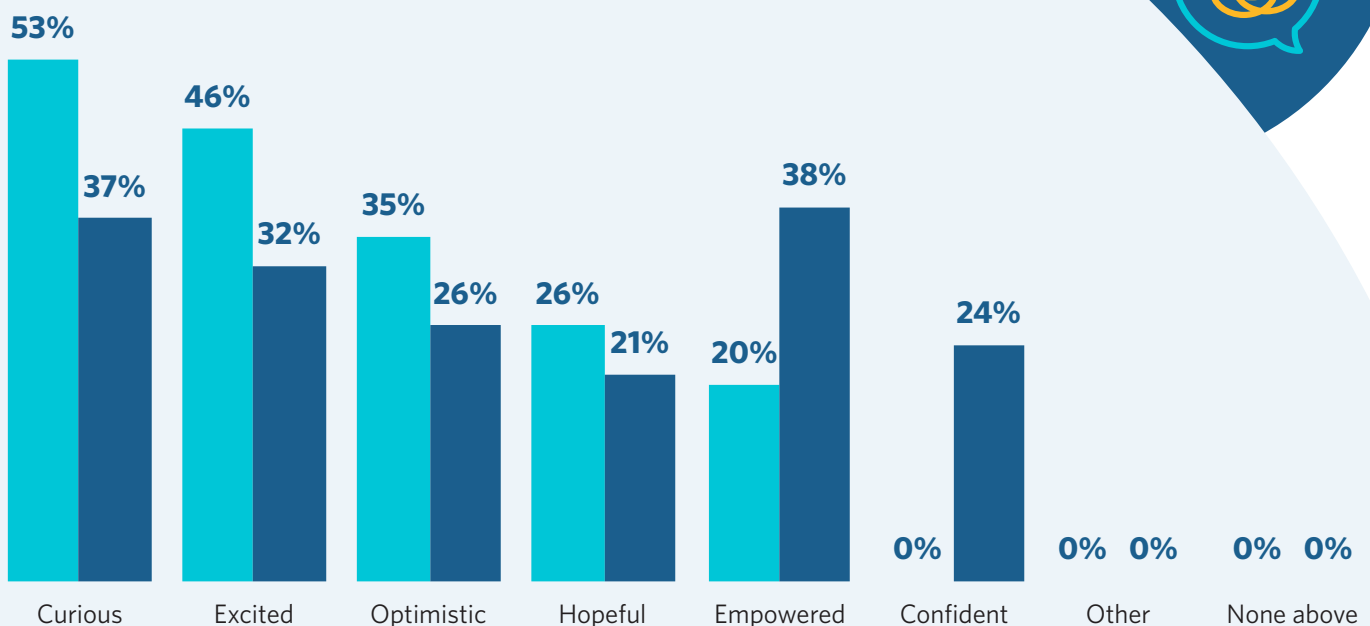
Many marcoms professionals are approaching these technologies with an open mind and looking to see the advantages of a new world, while also showing an awareness of the reputational concerns – **93% responded with NET positive sentiment** when asked how they feel about generative AI and BPA's impact on the delivery of marketing, PR or communications, **compared to 75% responding NET negatively**. This positivity was generally shared by respondents in France (96%) and Italy (89%).

More than half (**53%**) of UK respondents are **curious** about these technologies' use in the delivery of marketing, PR and communications, with **46% excited**, **35% optimistic** and **26% hopeful**. And while no one responded that they felt confident about what these new tools would mean, neither did anyone say they make them unsettled, scared, nervous or fearful.

Sentiment skews more negatively when it comes to generative AI and BPA's effect on the industries our respondents work in – 92% expressing NET negative emotions, compared to 88% for NET positive. **Confusion (41%), concern (39%) and feeling uninformed (39%)** were the most common responses, with more than half of marcoms professionals working in technology (54%), manufacturing (53%) and healthcare (53%) feeling concerned.

Which emotions describe how decision-makers feel about the use of generative AI:

- In the delivery of marketing, PR, or communications
- In the respondent's industry



Sentiment skews more negatively when it comes to generative AI and BPA's effect on the industries our respondents work in

Brand reputation's new frontier



Gregor Schermuly,

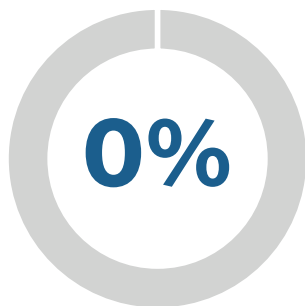
General Manager and Head of Product, OSK Berlin

The concerns discussed on the previous page suggest that marcoms professionals have developed an early understanding of generative AI and BPA's potential impact on the risk landscape.

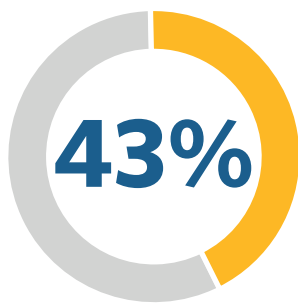
This is particularly true when it comes to brand reputation, which this report suggests is currently more of a barrier to the widespread use of generative AI and BPA than a lack of understanding or marcoms professionals being unwilling to learn something new.

While none of our marcoms professionals has experienced reputational issues from these kinds of technologies yet, **87% of respondents overall believe that the use of generative AI or BPA in marketing, PR or communications has the potential to impact their organisation's reputation.**

Concern is highest for the impact on company culture (43%), and wider industry disruption (43%). Breaking copyright laws or data privacy regulation, debates over the ethics of using generative AI or business process automation, the flood of synthetic content targeted at organisations (such as fake news or fake reviews), and cybersecurity threats were all selected as a point of concern by 42% of respondents.



have experienced reputational issues associated with AI or BPA



believe wider adoption of AI/BPA technologies will likely impact company culture

While the level of AI adoption – measured in daily and weekly use – and understanding within companies seems quite robust, and concerns about potential data and reputational risks are widespread, actual implementation of safeguards remains limited. There are three ways marcoms professionals should be thinking about this:

People before technology:

Prioritise training employees and keep them informed in a timely manner. When defining service specifications, human considerations should take precedence.

Integrated business models and AI transparency:

As AI technologies become increasingly integrated into services, marcoms professionals must leverage AI for efficiency gains that can free up human talent to focus on the high-value, creative, and strategic tasks that AI cannot yet accomplish. With increased capacity, agency teams can then become more a part of their clients' strategic decisions and creative processes.

Transparency across the tasks that are and are not automated will be key to maintaining client trust. AI use will become explicit in contracts and, by combining AI capabilities with the unique contributions of human staff in a transparent manner, agencies will be better placed to consult clients as they navigate the complex landscape of AI-powered marketing and communications.

Legal adaptability:

When GDPR emerged it compelled businesses to invest significantly in compliance measures. Keeping pace with fast-changing regulations, including forthcoming AI legislation in the EU, UK and US, will be crucial.

Grasping the possible

With every new technology, there's an adoption curve. First come the early adopters, then the explosion of users, before some fall away and you get to a new normal. ChatGPT has lost some of its vast numbers of daily users, but millions are still on the platform every day.

But generative AI is about so much more than ChatGPT. We're now into the adapt-and-adopt phase, where every major business is looking at how it can take the predictive automation elements of the generative model and slide them into their business processes. Some will be working with niche startups to solve bespoke challenges, while others are creating new solutions where they don't already exist.

For marcoms professionals, this means understanding the possible and layering that over the everyday to see where any overnight time savings can be made. Beyond content creation, this could include joined-up audience analysis, personalisation, quality checks, vast scale output, and endless optimisation.

But so long as flaws in the system still exist, expert oversight is crucial. Not just to tell you whether what you're producing will achieve your objectives, whether it is safe and compliant, but also to guide you and your company through the reputational risks of a growing minefield of disinformation. Fortunately, this report shows that the majority of marcoms professionals get this and are incorporating this careful approach into the way they work.

All signs point to a growing reliance on experience. On knowing what real looks like and knowing what good feels like. Automation is only as good as its directive input and the output is only as good as how it is perceived. Emotional intelligence won't be easily replaced.

When content scale ramps up, knowing what will work – and what won't, and why – is a currency that will only become more valuable.



Peter Wilson,
Head of Digital Reputation at
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Want to know more about how we can help?
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