THE PRIORITY IS DIGITAL AND SOCIAL – BUT PRACTITIONERS LACK SKILLS IN NEW TECHNIQUES

Insights from the second Asia-Pacific Communication Monitor.

BY **ANA ADI** AND **JIM MACNAMARA**

As in the previous Asia-Pacific Communication Monitor survey in 2015/16, communication practitioners in Asia Pacific see coping with the digital evolution and the social web as the most important strategic issue facing the sector over the next few years.

Coping with the digital evolution and the social web is a major concern to every second participant in the study and is consistent across companies, government, non-profit organisations and consultancies and agencies. Of these, practitioners in Malaysia, Hong Kong, India, the Philippines, Indonesia, Taiwan and Thailand are most concerned with these challenges, these being given less importance in Japan, Australia and Vietnam.

In addition, a number of other digitally related concerns have overtaken other strategic issues, including building and maintaining trust which comes only seventh in Asia-Pacific practitioner's priorities. Matching the need to address more audiences and channels with limited resources, using big data and/or algorithms for communication, and dealing with the speed and volume of information flow were all ranked within the top five most important issues for the field. Nearly one third of the participants support this view. Big data and algorithms are seen as particularly important in Taiwan, Thailand and Vietnam, but less focused in Australia, New Zealand and Malaysia.

> **"Coping with the digital evolution, the social web and other related concerns have overtaken other strategic issues, including building and maintaining trust."**

This is both good and bad news. On the one hand, the results show that practitioners in the region are more aware of the importance of digital media and the social web and ready to allocate more time to them. However, other findings show practitioners mainly use social media for distributing messages rather than interactive engagement. Also, practitioners lack technical skills in using important digital technologies.

Digital dominates – and is shifting to mobile

More than 90 per cent of the communication practitioners see social media and social networks as important channels for communication with stakeholders, gatekeepers and audiences. Their perceived importance has grown strongly since the previous survey in 2015/16, when 75 per cent rated social media as important and when those channels were rated second behind traditional press and media relations with print newspapers or magazines.

The shift to mobile communications is even stronger in Asia Pacific, with 83.8 per cent of practitioners rating mobile communication via phone or tablet applications and mobile websites as an important communication channel – an increase of 17.3 per cent since the
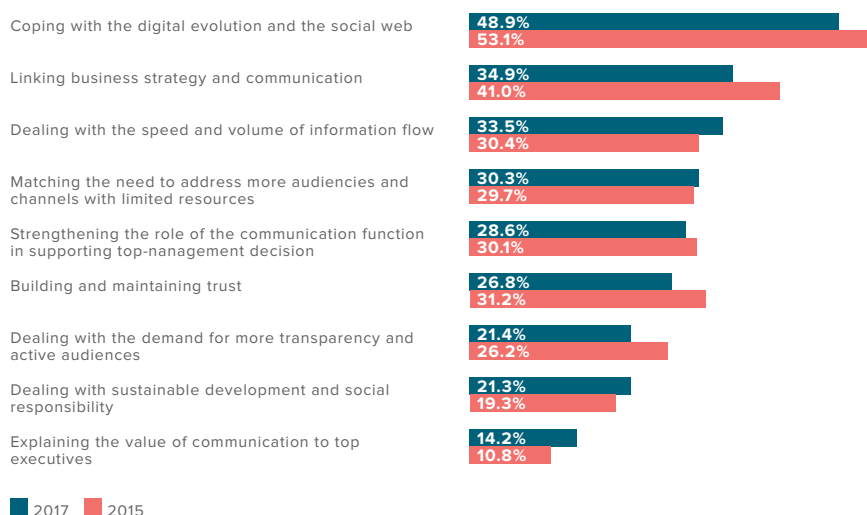
Coping with the digital evolution and the social web
48.9%
53.1%

Linking business strategy and communication
34.9%
41.0%

Dealing with the speed and volume of information flow
33.5%
30.4%

Matching the need to address more audiencies and channels with limited resources
30.3%
29.7%

Strengthening the role of the communication function in supporting top-nanagement decision
28.6%
30.1%

Building and maintaining trust
26.8%
31.2%

Dealing with the demand for more transparency and active audiences
21.4%
26.2%

Dealing with sustainable development and social responsibility
21.3%
19.3%

Explaining the value of communication to top executives
14.2%
10.8%

■ 2017 ■ 2015

Figure 1: Changing importance of strategic issues: more concerns about information overload, sustainable development and value creation

Social media and social networks (Blogs, Twitter, Weibo and the like)
90.4%
75.0% **+15.4**

Mobile communication (phone/tablet apps, mobile websites)
83.8%
66.5% **+17.3**

Press and media relations with online newspapers/magazines
83.3%
73.2% **+10.1**

Online communication via websites, e-mail, intranets
82.7%
73.6% **+9.1**

Face-to-face communication
74.9%
71.2% **+3.7**

Press and media relations with TV and radio stations
67.0%
66.8% **+0.2**

Events
63.3%
59.8% **+3.5**

Press and media relations with print newspapers/magazines
61.5%
76.5% **-15.0**

Corporate publishing/owned media (customer/employee magazines)
52.6%
39.1% **+13.6**

Non-verbal communication (appearance, architecture)
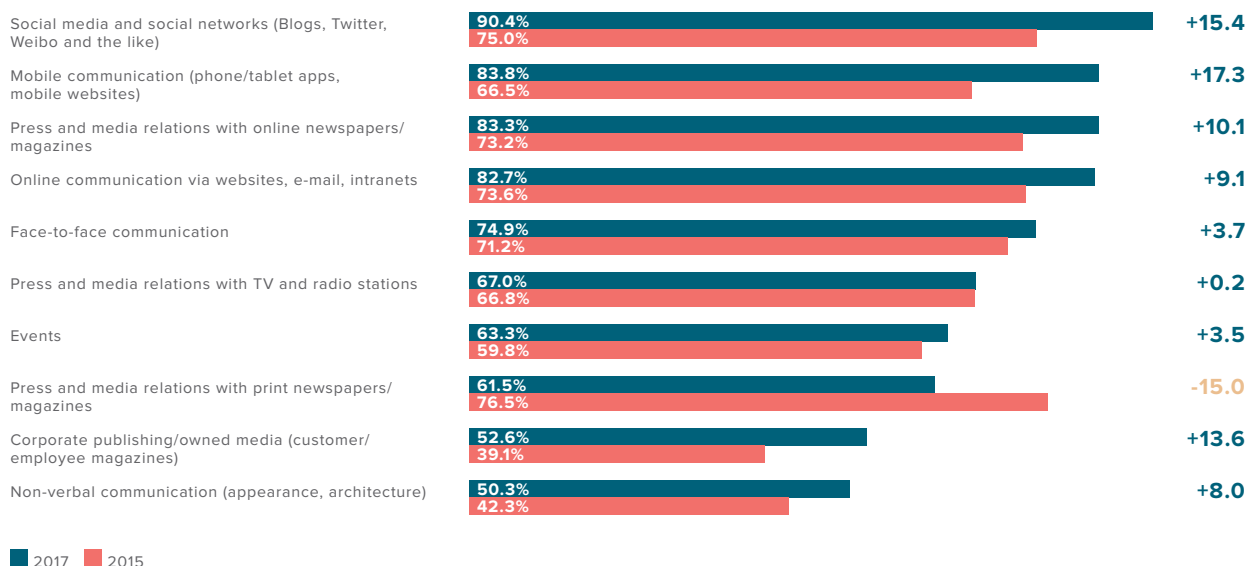**50.3%**
42.3% **+8.0**

■ 2017 ■ 2015

Figure 2: Development of communication channels since 2015: Mobile, social and owned media are clearly on the rise. Perceived importance for addressing stakeholders, gatekeepers and audiences in 2015 and 2017

previous Asia-Pacific Communication Monitor survey. China, Taiwan and the Philippines are leading the field here. The shift from the traditional PESO (paid, earned, shared, owned) model of media use to SOEP (shared, owned, earned, paid) which we noted in the 2015/2016 edition continues, with corporate publishing such as customer and employee magazines, now predominantly in digital form, having increased in priority (52.6 per cent of practitioners rating owned media as important in 2017/18 compared with 39.1 per cent in 2015/16).

As digital and social media are perceived as more important (Figure 1 on next page), it is not surprising that practitioners assign more importance to their associated channels and devices.

The rise of social media influencers

A new trend, evident in marketing communication in particular, is identification of the role and importance of social media influencers (SMIs) – people online who others follow and from whom they take a lead or advice in relation to buying products or services, identification of fashion trends, and even voting in elections.

More than 70 per cent of communication practitioners in Asia Pacific agree that social media influencers, defined as new types of independent third party endorsers who shape audience attitudes through blogs, tweets and the use of other social media, are important for their organisations' communication activities.

SMIs are important for our strategic communication activities **70.7%**

We use specific strategies to communicate with SMIs **49.6%**

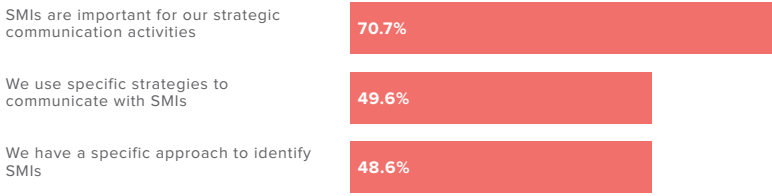We have a specific approach to identify SMIs **48.6%**

Figure 3: Social media influencers are important, but only every second organisation employs specific strategies for identifying and approaching them.
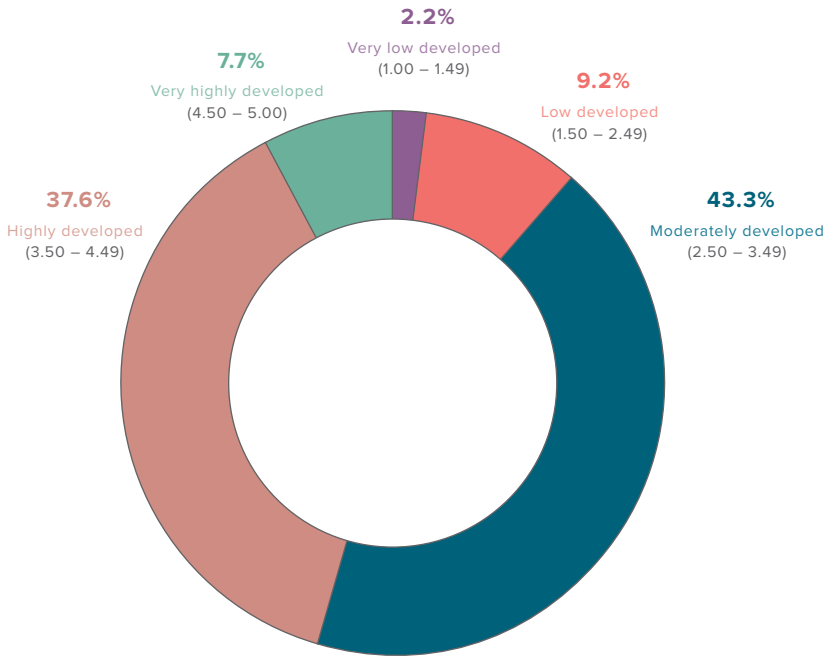
2.2%
Very low developed
(1.00 – 1.49)

7.7%
Very highly developed
(4.50 – 5.00)

9.2%
Low developed
(1.50 – 2.49)

37.6%
Highly developed
(3.50 – 4.49)

43.3%
Moderately developed
(2.50 – 3.49)

Figure 4: Social media capabilities of communication professionals in Asia Pacific: Only a minority has highly developed overall skills.

However, less than half of the organisations have an approach or strategies in place to engage with those influencers.

Engagement with SMIs is seen as most important in China, Taiwan, Thailand, Indonesia, Japan and India, while, surprisingly, this is not seen as having the same importance in Australia, New Zealand, Hong Kong and Singapore. Less than half of Australian practitioners see engagement with SMIs as important and less than 30 per cent have specific strategies for engaging SMIs, despite growing recognition of their influence.

Given the importance of social media influencers, identification of and engagement with SMIs appears to be a key area of communication strategy for future development in Asia Pacific. Many organisations have not fully utilised the potential of third-party endorsement and opinion leadership in social networks.

Moderate social media skills and knowledge

Despite the recognised importance of social media, only a small proportion of communication practitioners in Asia-Pacific (7.7 per

Plan activities	81.7%		4.14
Manage relationships	80.1%		4.10
Lead people and groups	79.6%		4.09
Strategic positioning	77.0%		4.05
Control	70.9%		3.87
Manage information	70.1%		3.84
Establish structures and processes	67.0%		3.82
Manage human resources	66.5%		3.80
Manage financial resources	61.5%		3.70

(1) Very low   (3) Medium   Very high (5)
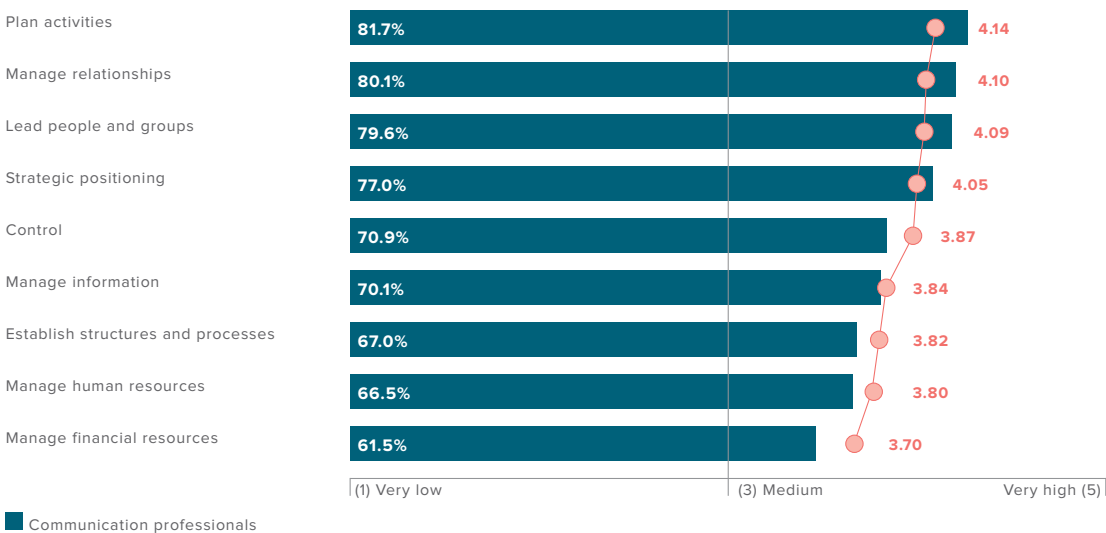
■ Communication professionals

Figure 5: Management capabilities: communicators are self-confident in planning, leading and fostering relationships, but less in handling human resources and finances

cent) have very highly developed skills in using these platforms. Based on ratings of 11 skill dimensions, the social media skills of another third (37.6 per cent) can be assessed as highly developed. However, 43.3 per cent have only moderate skills and 11.4 per cent have low or very low skills in using these important channels. The highest scores of overall skills in social media were reported from Indonesia, China, Taiwan, Thailand and Vietnam while, somewhat surprisingly, practitioners in Japan, Australia, and Hong Kong are lagging in social media proficiency.

These findings indicate that, while digital and social media skills are increasing, the use of interactive media for two-way communication – i.e., dialogue and listening as recommended by Taylor and Kent (2014), Gregory (2015), Macnamara (2016) and others – as well as digital analytics are areas for improvement. Professional associations as well as training providers and universities could support practice and take advantage of opportunities by offering specialised programs in these areas.

Management skills and development of capabilities need to be improved

Across the Asia-Pacific region communication professionals are confident of their competence in planning and managing relationships (81.7 respectively 80.1 per cent rate their competencies as high in these activities). However, in managing human resources and financial management, only two-thirds or less rate themselves highly.

Notwithstanding some high self-assessments, communicators at all levels believe that their knowledge and skills need to be improved. In particular, practitioners across the region identified technical knowledge and skills as a key area for development. Practitioners in China, Indonesia, Malaysia, the Philippines, Taiwan, Thailand and Vietnam identified a need to increase their business knowledge and skills, while practitioners in Australia, New Zealand, Singapore and Hong Kong feel more confident in these fields.

ABOUT THE ASIA-PACIFIC COMMUNICATION MONITOR

The Asia-Pacific Communication Monitor (APCM), launched in 2015/16 as a bi-annual survey, is part of the global Communication Monitor series, which provides valuable insight into the communication industry and its future, assessing the impact of digital technologies, social media, mobile communications, and the need for strategic focus to align communication outcomes to organizational goals. This year's edition of APCM is based on the answers of more than 1,300 communication professionals working in corporations, government, non-profit organisations, and communication agencies across 22 Asia-Pacific countries. This year's APCM examined five areas: (1) organisations (their structure and country or countries of operation); (2) communication professionals (their demographics, role, experience, etc.); (3) the situation in which they operate (practices, skills, job satisfaction, etc.); (4) the communication department (its role, influence and performance); and (5) perceptions of the future (importance of channels, value contribution, etc.).

The Asia-Pacific Communication Monitor 2017/18 is organised by the Asia-Pacific Association of Communication Directors (APACD) in collaboration with Quadriga University of Applied Sciences, Berlin and the European Public Relations Education and Research Association (EUPRERA), which also support the European and Latin America Communication Monitor. The study was also supported by PRIME Research (partner); Nanyang Technological University, Singapore (academic partner); RFI Daylight, Hong Kong (video partner), and Communication Director magazine (media partner).

The study is conducted by four leading professors: Professor Jim Macnamara from the University of Technology Sydney; Professor May O. Lwin from Nanyang Technological University, Singapore; Professor Ana Adi from Quadriga University of Applied Sciences, Berlin; and Professor Ansgar Zerfass from the University of Leipzig, who is lead researcher of the European Communication Monitor and the Communication Monitor series globally, supported by academics across the region.

Also female professionals have a significantly stronger desire to strengthen their business and management knowledge than males.

Communication tasks and practices continue to be media-centric and mostly operational

Current practices in Asia Pacific continue to be media-centric and mostly operational and tactical. In fact, one third (32.8 per cent) of all practices such as talking to journalists, writing media releases, producing communication materials and organising events. A further 28.3 per cent of the practitioner's work time is dedicated to management activities such as planning, organising, leading staff, budgeting, evaluating processes and strategies and justifying communication spending.

"Female professionals have a significantly stronger desire to strengthen their business and management knowledge than males."

"Just one fifth of the work of communicators is used for strategic and reflective activities."
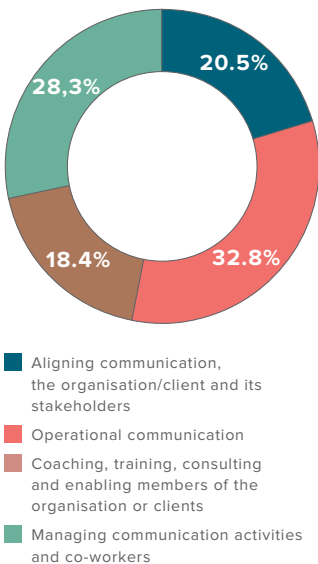
Just one fifth of the work of communication professionals (20.5 per cent) is used for strategic and reflective activities to align the organisation or client and its stakeholders and publics, such as studying business and social research reports, identifying organisational goals, monitoring public issues and stakeholder expectations, discussing strategies with senior management and other departments, developing scenarios and so on. A further 18.4 per cent of communication practitioners' time is used for coaching, training and enabling staff of the organisation or clients.

Characteristics of excellent communication departments

The study reveals that excellent communication departments put a higher priority on dealing with digital challenges and active audiences, using big data, enabling top management, and building trust for the organisation. They engage more intensively with social media influencers, employ practitioners with stronger social media and management capabilities, and invest significantly more in training their communication staff. Also, professionals working in excellent communication departments are significantly more satisfied with their jobs, reporting an average overall satisfaction rating of 4.09 on a five-point scale (versus 3.45 for other departments). Staff in excellent communication departments is also more confident that their departments contribute significantly to organisational success. ●

References:
Gregory, A. (2015). Practitioner-leaders' representation of roles: T*he Melbourne Mandate. Public Relations Review, 41*(5), 598–606.
Macnamara, J. (2016). *Organizational listening: The missing link in public communication.* New York, NY: Peter Lang.
Taylor, M., & Kent, M. (2014). Dialogic engagement: Clarifying foundational concepts. *Journal of Public Relations Research*, 26(5), 384–398.

Figure 6: How Asia-Pacific communicators spend their productive time at work

- Aligning communication, the organisation/client and its stakeholders
- Operational communication
- Coaching, training, consulting and enabling members of the organisation or clients
- Managing communication activities and co-workers

Overall job satisfaction	Excellent communication departments	Other communication departments	All communication departments
Practitioners with high overall job satisfaction (portion)	80.1%	50.0%	56.6%
Overall satisfaction (mean)	4.09	3.45	3.61

Figure 7: Practitioners working in excellent communication departments are generally more satisfied with their job

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