

# ASIA-PACIFIC COMMUNICATION MONITOR

## 2015/2016

THE STATE OF STRATEGIC COMMUNICATION AND  
PUBLIC RELATIONS IN A REGION OF RAPID GROWTH.  
SURVEY RESULTS FROM 23 COUNTRIES.

ORGANISED BY:



ASIA-PACIFIC ASSOCIATION OF  
COMMUNICATION DIRECTORS



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# ASIA-PACIFIC COMMUNICATION MONITOR 2015/16

THE STATE OF STRATEGIC COMMUNICATION AND PUBLIC RELATIONS  
IN A REGION OF RAPID GROWTH. SURVEY RESULTS FROM 23 COUNTRIES.

Jim Macnamara, May O. Lwin, Ana Adi and Ansgar Zerfass

A study organised by the Asia Pacific Association of Communication Directors (APACD), the European Public Relations Education and Research Association (EUPRERA) and Quadriga University of Applied Sciences, supported by partner PRIME Research International and media partner Communication Director magazine

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### **Contact:**

Please contact the lead researchers, national research team members in your country or the APACD coordinator if you are interested in presentations, workshops, interviews, or further analyses of the insights presented here. Contacts are listed on page 96.

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## Foreword



It's my pleasure to welcome you to the inaugural edition of the Asia-Pacific Communication Monitor, the first large-scale survey on the current status and the future of strategic communication in Asia Pacific. Aimed at communication professionals working in organisations and consultancies, this non-profit study has been written by professors from some of the most renowned universities in the region and is globally linked to similar studies in Europe and Latin America. This enables the comparison of the practices and challenges faced by Asia-Pacific communicators with those faced by their counterparts around the world.

Unsurprisingly, given the dynamism of the communications field on Asia-Pacific, an important element of the first Asia-Pacific Communication Monitor is looking at the future development of the profession: the predictions of our respondents is a vital picture of not only where the profession stands now but how it sees itself growing in the next few years. As the Monitor continues to be published in the future, it will paint a fascinating picture of the evolution of our shared understanding of our profession.

For example, among the Monitor's main areas of interest is the relationship between communications and the media. Looking to the future of the communications landscape, the Monitor reveals that earned and owned media are rising in importance in Asia-Pacific, and predicts closer collaborations with mass media resulting in co-produced content and joint publications. Another important focus is communication channels and instruments: mobile communication such as phone or tablet apps and mobile websites will see a big leap in importance by 2018 compared to today.

What makes these findings especially interesting is the breakdown of responses by country and region: I believe that, by explaining the difference in attitudes among communicators working across this diverse region, the Asia-Pacific Communication Monitor provides a unique service. I hope you find it of value, and look forward to sharing future editions with you in the years to come.

Pierre Goad

*President, Asia-Pacific Association of Communication Directors (APACD)*

## Introduction

Continuing rapid changes in the media landscape including new channels of communication and new forms of owned media and content are characteristics of the environment in which communication professionals in Asia-Pacific work. Along with the 'rise and rise' of social media, mobile communication technologies, and new approaches to collaborative content production through media partnerships and owned media, the ongoing challenge to demonstrate the value of communication to organisations and a number of other issues are explored in this first Asia-Pacific Communication Monitor.

The study explores the current status and future trends in strategic communication and public relations in the region. It is based on responses from 1,200 communication professionals in 23 countries. We thank everybody who contributed their valuable time. With this edition the Communication Monitor series has expanded to include one of the fastest growing regions in the world. The European Communication Monitor was launched in 2007, it expanded to Latin America in 2014 and now, approaching its 10th anniversary, it has become the most comprehensive study mapping the communication profession worldwide in more than 80 countries.

For initiating the Asia-Pacific Communication Monitor, thanks are due to the lead researcher of the European Communication Monitor, Professor Dr. Ansgar Zerfass from the University of Leipzig. He and Professor Dr. Ana Adi from Quadriga University of Applied Sciences in Berlin have brought considerable experience from Europe to the Asia-Pacific research team.

In addition, our sincere thanks go to the partner who supported the Asia-Pacific Communication Monitor, PRIME Research International, and the organisers in this region, the Asia-Pacific Association of Communication Directors (APACD), EUPRERA, Quadriga University; and the extended research team from renowned universities across the region as listed inside. They, and others working behind the scenes, have enabled us to deliver this first Asia-Pacific Communication Monitor.

Prof. Dr. Jim Macnamara, Assoc. Prof. Dr. May O. Lwin, Prof. Dr. Ana Adi, Prof. Dr. Ansgar Zerfass  
*Lead researchers, Asia-Pacific Communication Monitor*





**Research design**

## Research design

The Asia-Pacific Communication Monitor (APCM) is a unique transnational survey in strategic communication based on responses from 1,200 communication professionals from 23 countries working in corporations, non-profits, governmental organisations and communication agencies. The current study is the first in Asia-Pacific, following the example set by similar studies initiated in other continents (Europe, since 2007, and Latin America, since 2014). With more than 80 countries covered by comparable methodology and partially overlapping questions, the communication monitor studies are known as the most comprehensive research in the field worldwide.

A joint study by academia and practice, the APCM has been conducted by a core research team of four professors combining regional and international experiences: Jim Macnamara (University of Technology Sydney), May O. Lwin (Nanyang Technological University Singapore), Ana Adi (Quadriga University of Applied Sciences Berlin), and Ansgar Zerfass (University of Leipzig). An extended research team of professors and national research collaborators in key countries of the region ensures that the survey reflects the diversity of the field across Asia-Pacific, the full list of which is included on page 96 of this report. The project has been organised by the Asia-Pacific Association of Communication Directors (APACD), Quadriga University and the European Public Relations Education and Research Association (EUPRERA), supported by partner PRIME Research International, a global leader in communication research, and media partner Communication Director magazine.

The research framework for the survey is designed along five key areas similar to other international studies. It includes a large number of independent and dependent variables along the five factors: personal characteristics of communication professionals (demographics, education, job status, experience); features of the organisation (structure and country); attributes of the communication department; the current situation as well as perceptions on key developments relevant for the profession.

Two constructs are explored in the study. Firstly, recent developments in practice and academic theories are empirically tested by using a set of questionnaire instruments derived from literature. The conceptual background of the APCM 2015/16 includes debates on the future role of earned, owned and paid media for opinion building (Hallahan, 2014; Macnamara, 2014d; Verčič & Tkalac Verčič, 2015), the development of social media and traditional communication channels over time (Wright & Hinson, 2012), social media skills of communicators (Tench & Moreno, 2015), overall challenges and issues in the profession (Zerfass et al., 2015), alternative ways to explain the value of communication (Kiesenbauer & Zerfass, 2015), as well as measurement and evaluation (Watson & Noble, 2014). Secondly, this study applies statistical methods and a benchmarking methodology (Verčič & Zerfass, 2015) to identify outperforming communication departments and the factors which makes the difference.

The multitude of insights based on this research helps the profession to understand constraints and opportunities to make informed managerial decisions.



## Methodology and demographics

## Methodology and demographics

The questionnaire used for the Asia-Pacific Communication Monitor 2015 consisted of 26 questions arranged in 14 sections. The instruments used different scales. They were based on research questions and hypotheses derived from previous research and literature.

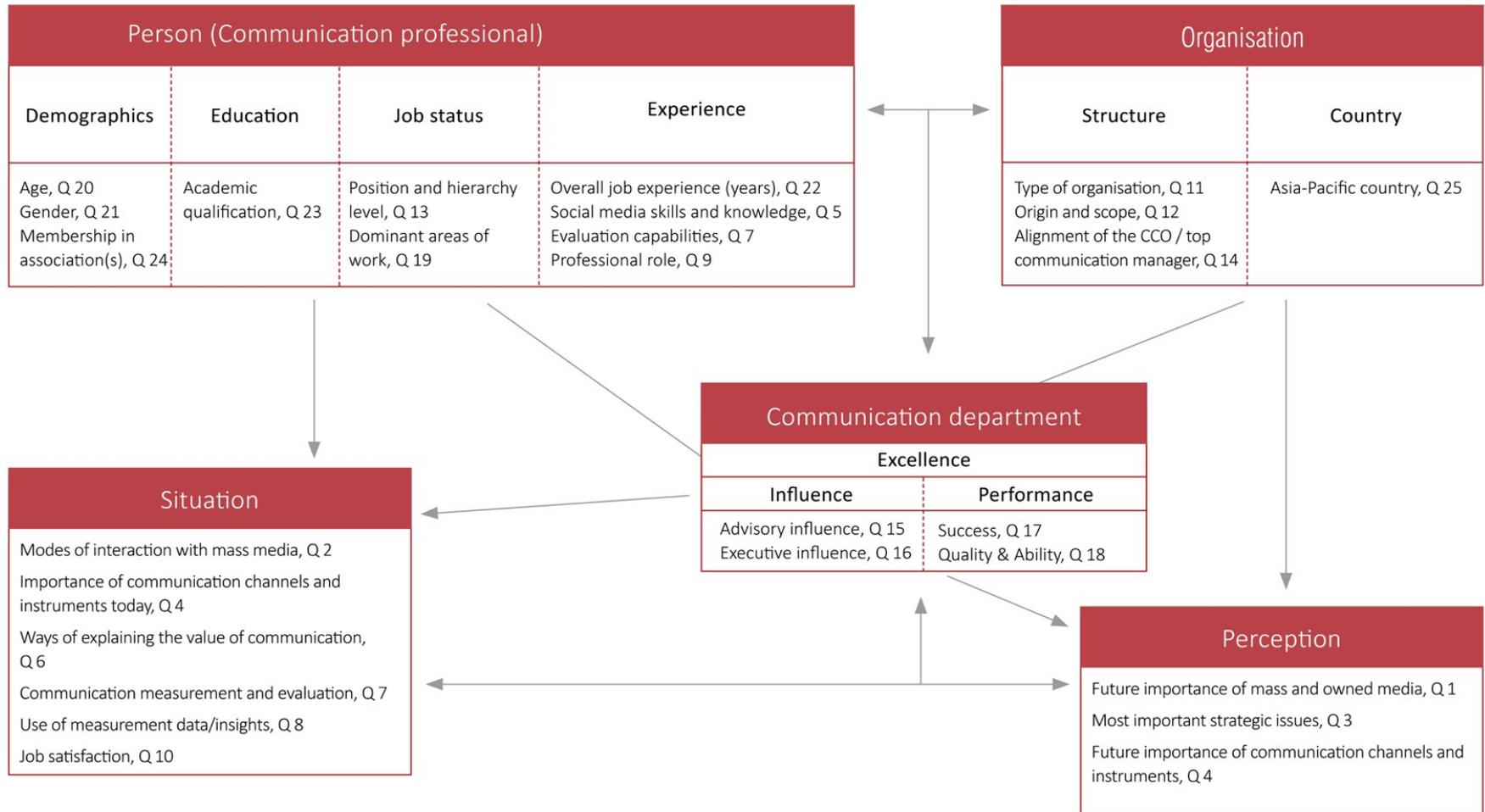
The online survey in English language was pre-tested in July 2015 with 68 communication professionals in 14 Asia-Pacific countries. Amendments were made where appropriate and the final questionnaire was activated for four weeks in August 2015. More than 21,000 professionals throughout Asia-Pacific were invited with personal e-mails based on a database provided by the Asia-Pacific Association of Communication Directors (APACD). Additional invitations were sent via national research collaborators and professional associations. 2,154 respondents started the survey. 1,200 of them fully completed it and were clearly identified as part of the population; all other responses were deleted from the dataset. This strict selection of respondents is a distinct feature of the APCM and the whole communication monitor series. It sets this study apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results have been tested statistically with, depending on the variable, Pearson's chi-square tests ( $\chi^2$ ), ANOVA/Scheffe post-hoc tests, Kendall rank correlation, and T-Tests. In this report, results are classified as significant ( $p \leq 0.05$ )\* or highly significant ( $p \leq 0.01$ )\*\* in the graphics and tables or marked in the footnotes.

Three out of four respondents are communication leaders: 43.8 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy and 33.2 per cent are unit leaders or in charge of a single communication discipline in an organisation. 62.7 per cent of the professionals interviewed have more than ten years of experience in communication management, 56.9 per cent of respondents are female and the average age is 41. A vast majority (96.9 per cent) in the sample has a diploma or degree, with 55.9 per cent holding at least one university degree. A quarter of the respondents (25.7 per cent) work in multinational organisations with roots in Asia-Pacific. Another 31.8 per cent represent multinational organisations headquartered in another continent, while 38.8 per cent work in organisations with a national or local scope. Almost three out of four respondents work in communication departments (in joint stock companies, 38.3 per cent; private companies, 17.1 per cent; governmental organisations, 11.9 per cent; non-profit organisations or associations, 7.8 per cent), while 24.9 per cent are communication consultants working freelance or for agencies.

Overall, 23 countries participated in the survey. The countries with the largest number of respondents were India, Australia, Singapore, Hong Kong and China, followed by Vietnam, Thailand and Malaysia. The dataset provided more detailed insights for 12 to 14 countries, depending on each question.

## Research framework and questions



## Demographic background of participants

### POSITION

Head of communication, agency CEO	43.8%
Responsible for single communication discipline, unit leader	33.2%
Team member, consultant	17.8%
Other	5.2%

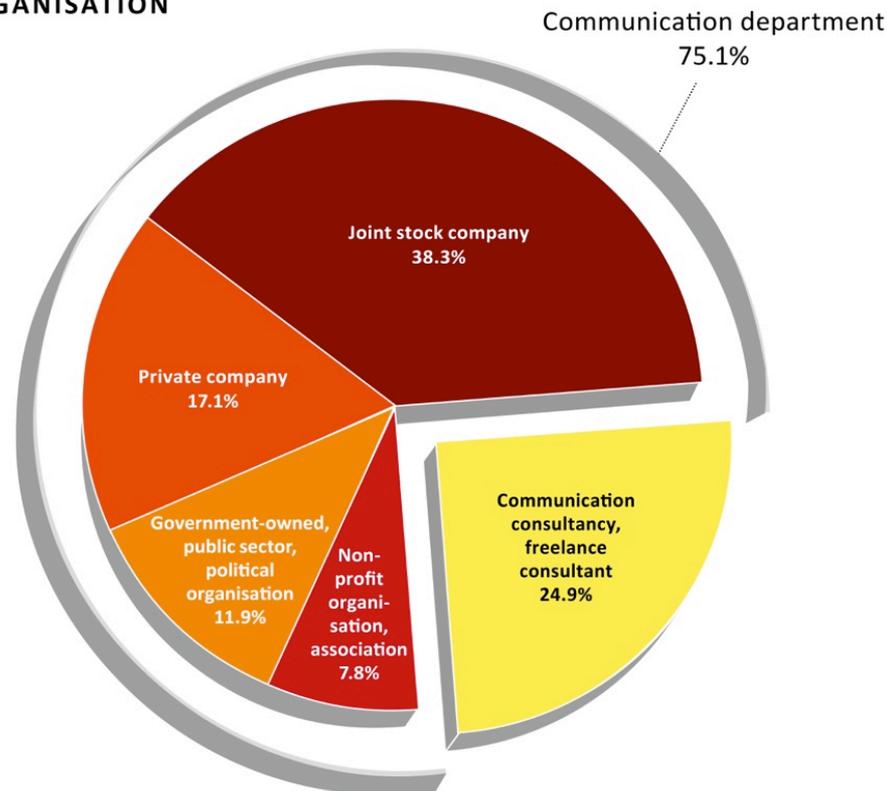
### JOB EXPERIENCE

More than 10 years	62.7%
6 to 10 years	20.2%
Less than 5 years	17.2%

### ORIGIN/SCOPE OF ORGANISATIONS

International organisation/company headquartered in Asia-Pacific	25.7%
International organisation/company headquartered on another continent	31.8%
National or local organisation/company	38.8%
Other	3.8%

### ORGANISATION



## Personal background of respondents

### *Gender / Age*

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
<b>FEMALE</b>	56.9%	54.6%	57.0%	62.4%
<b>MALE</b>	43.1%	45.4%	43.0%	37.6%
<b>AGE (ON AVERAGE)</b>	41.0 yrs	45.3 yrs	39.4 yrs	33.5 yrs

### *Membership in a professional association*

APACD	15.5%
OTHER INTERNATIONAL COMMUNICATION ASSOCIATION	18.2%
NATIONAL PR OR COMMUNICATION ASSOCIATION	38.6%

### *Highest academic education qualification\**

DOCTORATE (PH.D. OR OTHER)	2.5%
MASTER (M.A., M.SC., M.B.A., MAG., ETC.)	4.1%
BACHELOR (B.A., B.SC., ETC.)	49.3%
POLYTECHNIC/TECHNICAL DIPLOMA	41.0%

## Countries represented in the study

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### RESPONDENTS ARE BASED IN 23 COUNTRIES IN ASIA-PACIFIC

---

 Australia

 Fiji

 Japan

 Malaysia

 Pakistan

 Taiwan

 Bangladesh

 Hong Kong (SAR)

 Korea (Republic of)

 Myanmar

 Philippines

 Thailand

 Cambodia

 India

 Laos

 Nepal

 Singapore

 Vietnam

 China

 Indonesia

 Macau (SAR)

 New Zealand

 Sri Lanka



**Future relevance  
of mass media**

## Chapter overview

Unlike traditional media models in which content is broadly categorised as advertising or editorial, the PESO model (paid, earned, shared, and owned) continues to evolve (Hallahan, 2014; Verčič & Tkalac Verčič, 2015). There are clear signs that paid and earned media content – advertising and traditional media publicity – are in decline (McChesney, 2013, p. 172; Macnamara, 2014a; O'Donnell, McKnight, & Este, 2012) and that owned and shared media are on the rise.

Along with global data showing a turndown and near collapse of media business models based on traditional advertising (Macnamara, 2014a; Pew Research Center, 2012), communication professionals in Asia-Pacific foresee an increase in use of owned media (56.3 per cent). Owned media are expanding well beyond traditional corporate publishing to include an array of new content formats described as 'native advertising' (paid promotion that is presented to not look like advertising) and other euphemistic terms such as sponsored content, brand integration, and 'embedded marketing' (Macnamara, 2014b, 2015). While providing new opportunities for marketers and media proprietors, some of these new formats are raising questions about transparency and ethics, as they blur the boundaries between paid promotion and news. A recent analysis of the relationships between journalism and PR showed that "the PR, advertising, marketing, and media industries need to work together to develop consistent responsible codes of practice in relation to emerging practices of 'embedded' marketing communication in its various guises, such as 'native advertising', 'integrated content', and new forms of 'advertorial'" (Macnamara, 2014b, p. 231). The research has warned that "convergence" between journalism and PR is growing and needs to be addressed with clear "rules of engagement" (Macnamara, 2015a).

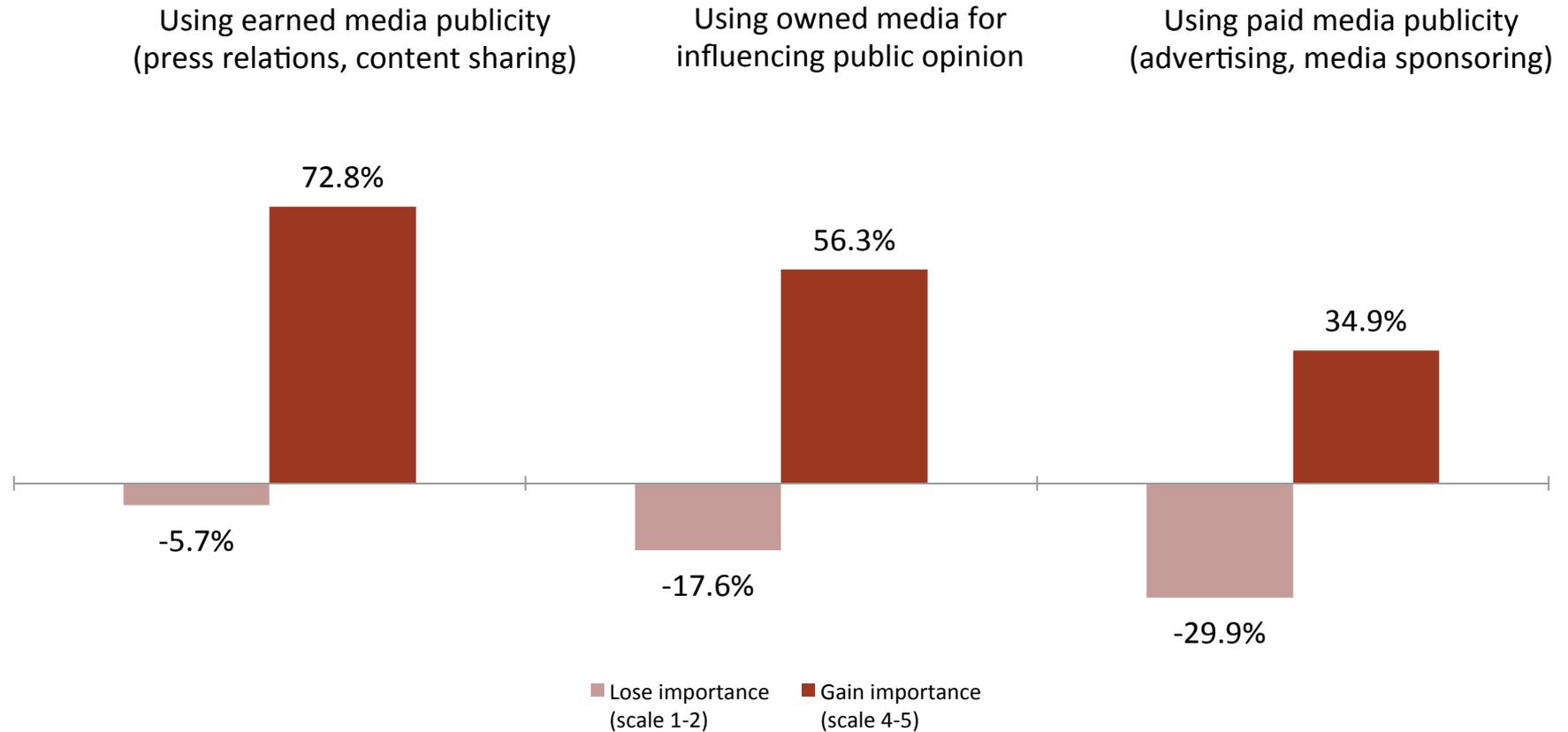
Strategic partnerships with media organisations are seen as most important in Malaysia, Indonesia, the Philippines, Taiwan, and India, while Hong Kong, Australia and New Zealand see commercial arrangements with media as less important – perhaps due to stricter media regulations and greater separation between editorial and advertising in these countries. Perceptions of the future of media relations are also dependent on the area of communication in which professionals work. Strategic partnerships leading to approaches such as sponsored content, 'brand journalism' and native advertising are preferred by specialists in marketing, brand and consumer communication and those working in online media.

Shared media include a growing array of social media in which government, corporations, and NGOs coproduce content with individual *prosumers* (Toffler, 1970, 1980) and *producers* (Bruns, 2008) – or what Rosen (2006, para. 1) calls "the people formerly known as the audience". These former 'consumers' and users are increasingly producers and distributors of news and information in shared media.

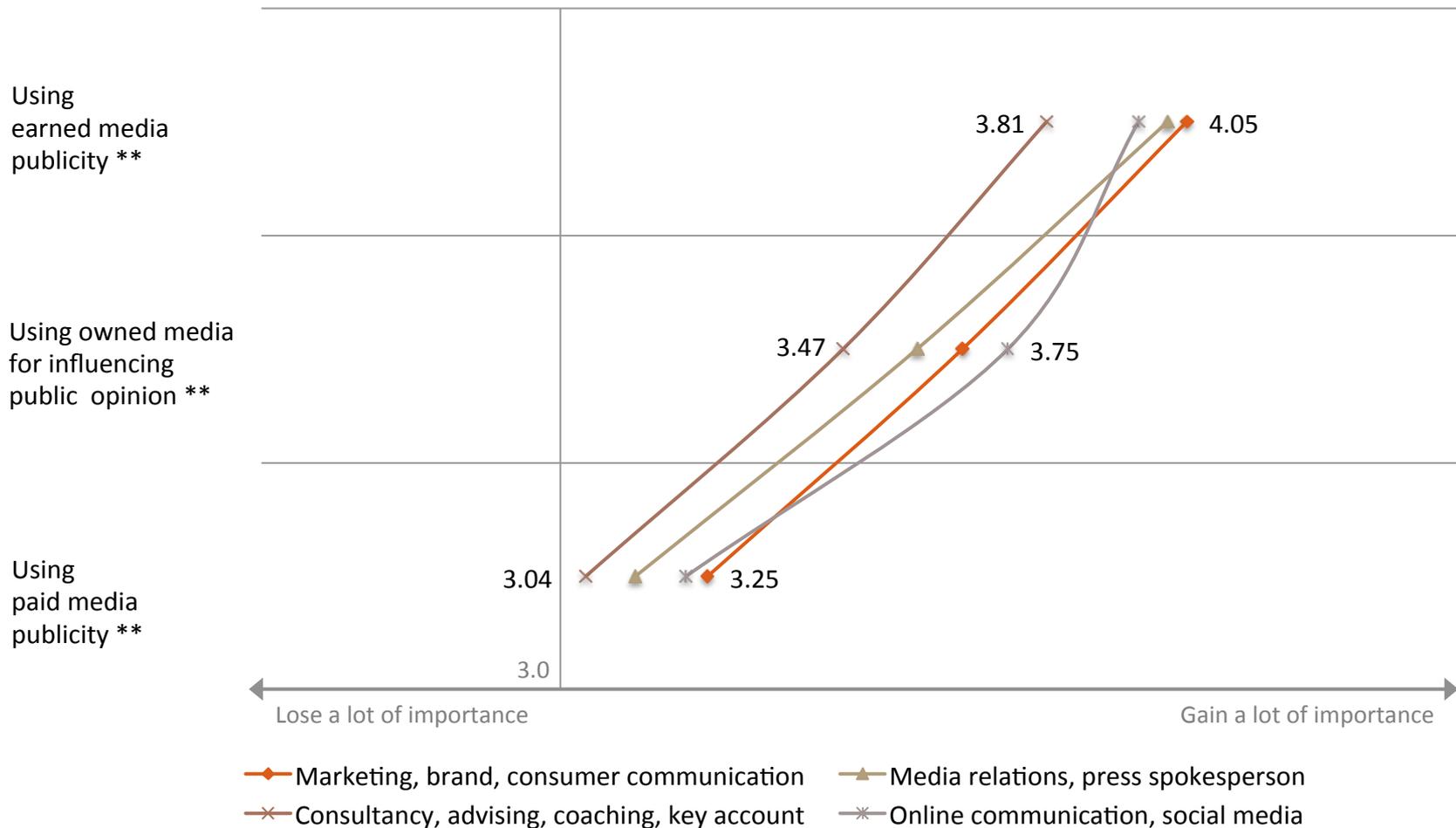
Despite the shift towards new formats, 72.8 per cent of communication professionals in Asia Pacific believe that earned media publicity will continue to be important. However, influencing media 'gatekeepers' and media agendas are less important than direct distribution of information and monitoring news and opinion.

Interestingly, communication professionals use mass media to monitor news and public opinion (76.3 per cent) as much as they do for distributing information about the organisation, its products, or services (76.1 per cent). This implies listening, but monitoring is done for mostly self-serving purposes as discussed later in this report.

## Future relevance of media for strategic communications: earned and owned media are rising in importance; inconsistent views on paid media

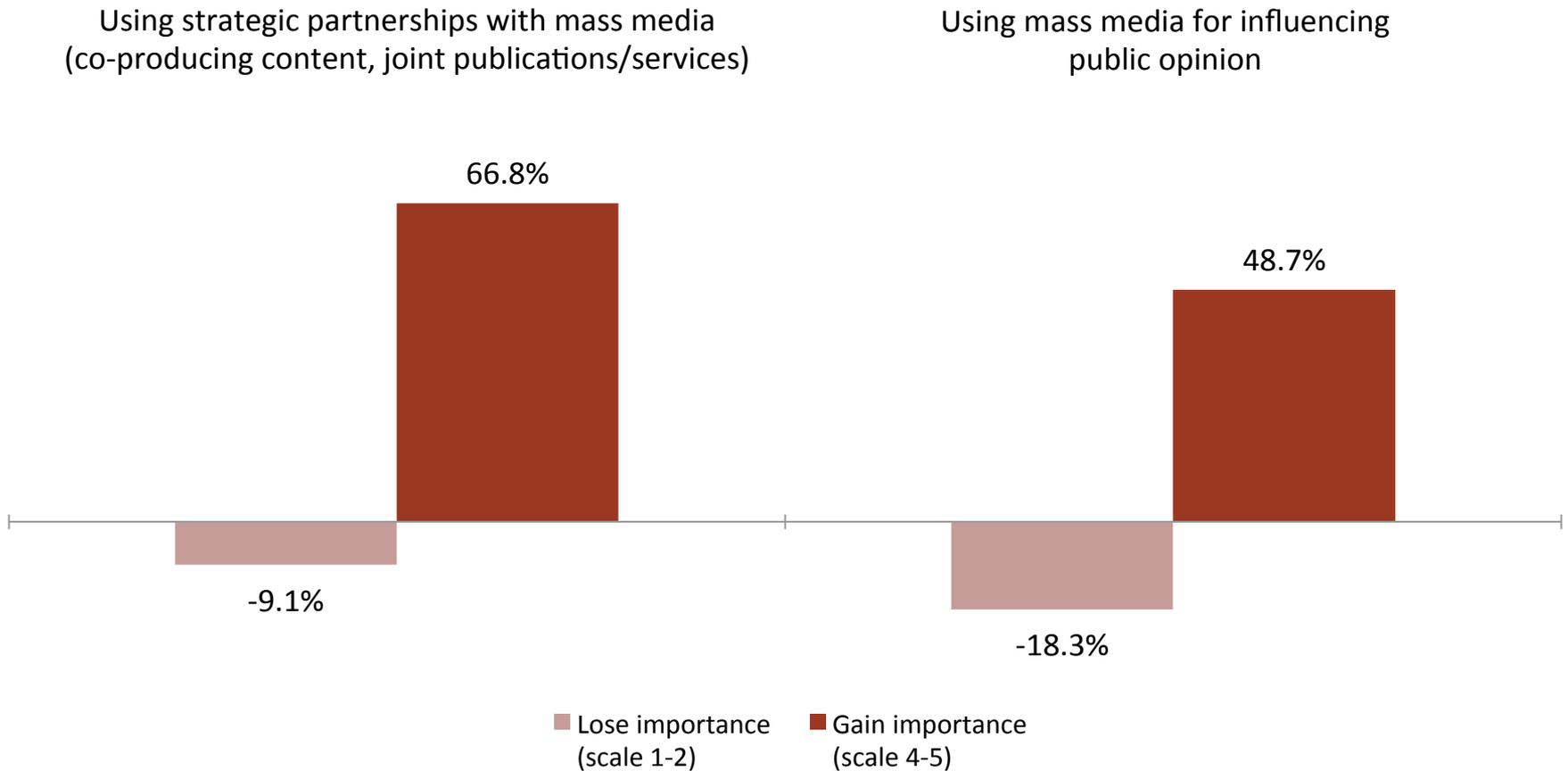


# Assessment of paid, owned and earned media is significantly correlated with the professional role and experience of communicators

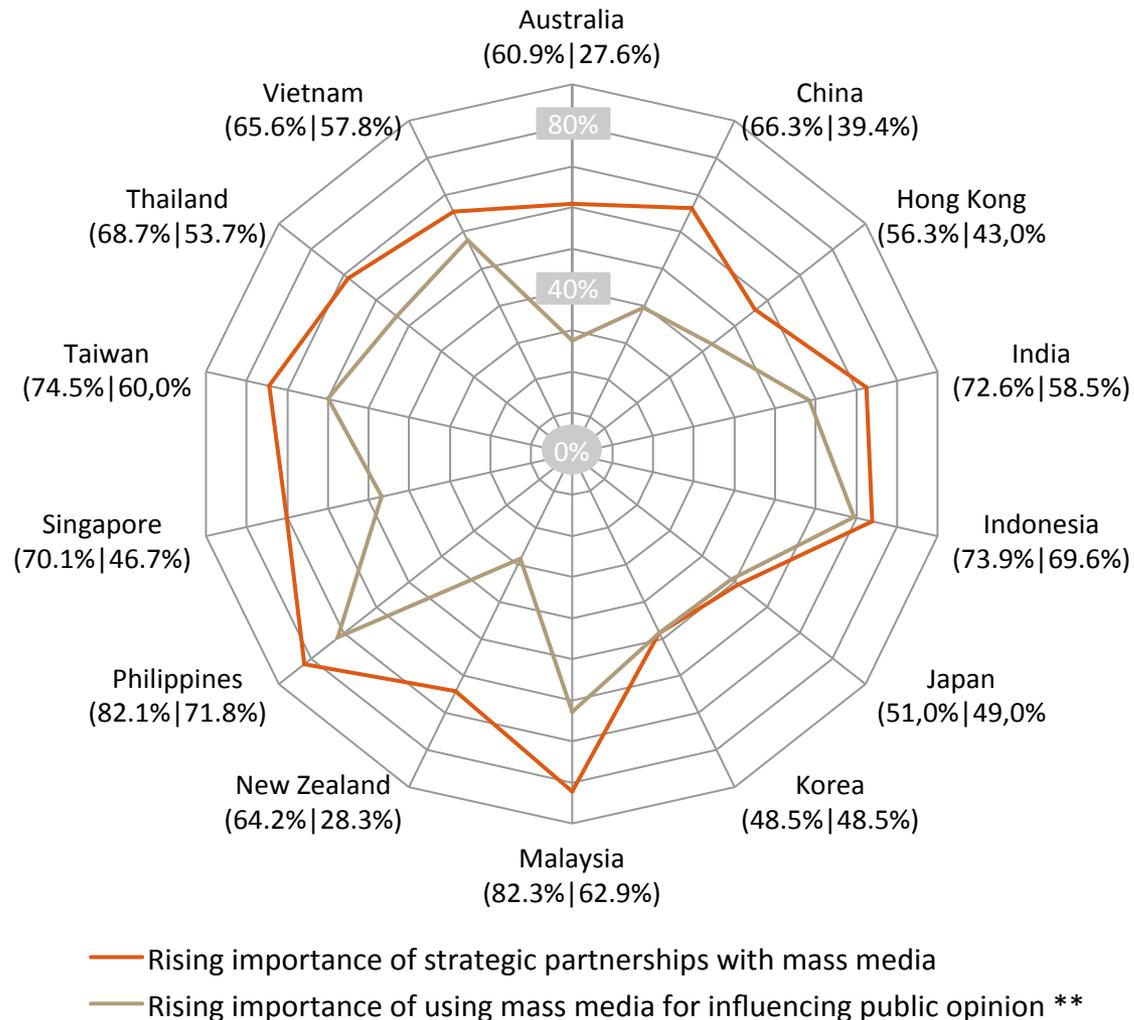


www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 119 PR Professionals. Q1: Please rate the relative importance of the following strategic communication activities within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance). \*\* Highly significant differences (independent sample T-test, p ≤ 0.01).

Two thirds of respondents believe in a rising importance of mass media as strategic collaborators; less see a growing relevance for opinion building



## Relevance of mass media for strategic communication in various countries

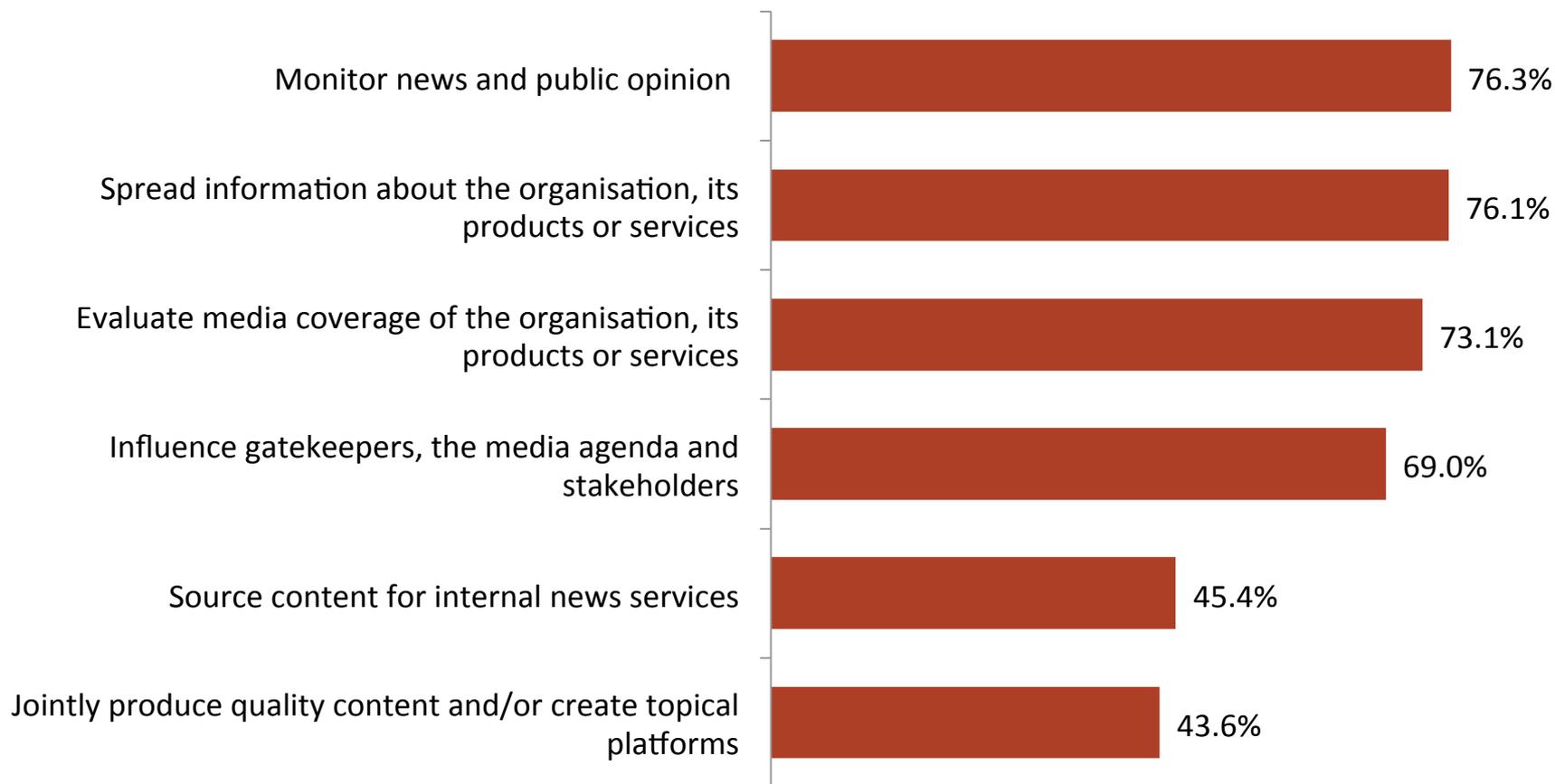


www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,185 PR Professionals from 14 countries. Q 1: Please rate the relative importance of the following strategic communication activities within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance). Percentages: Frequency based on scale points 4-5. \*\* Highly significant differences (ANOVA/Scheffe post-hoc test,  $p \leq 0.01$ ).

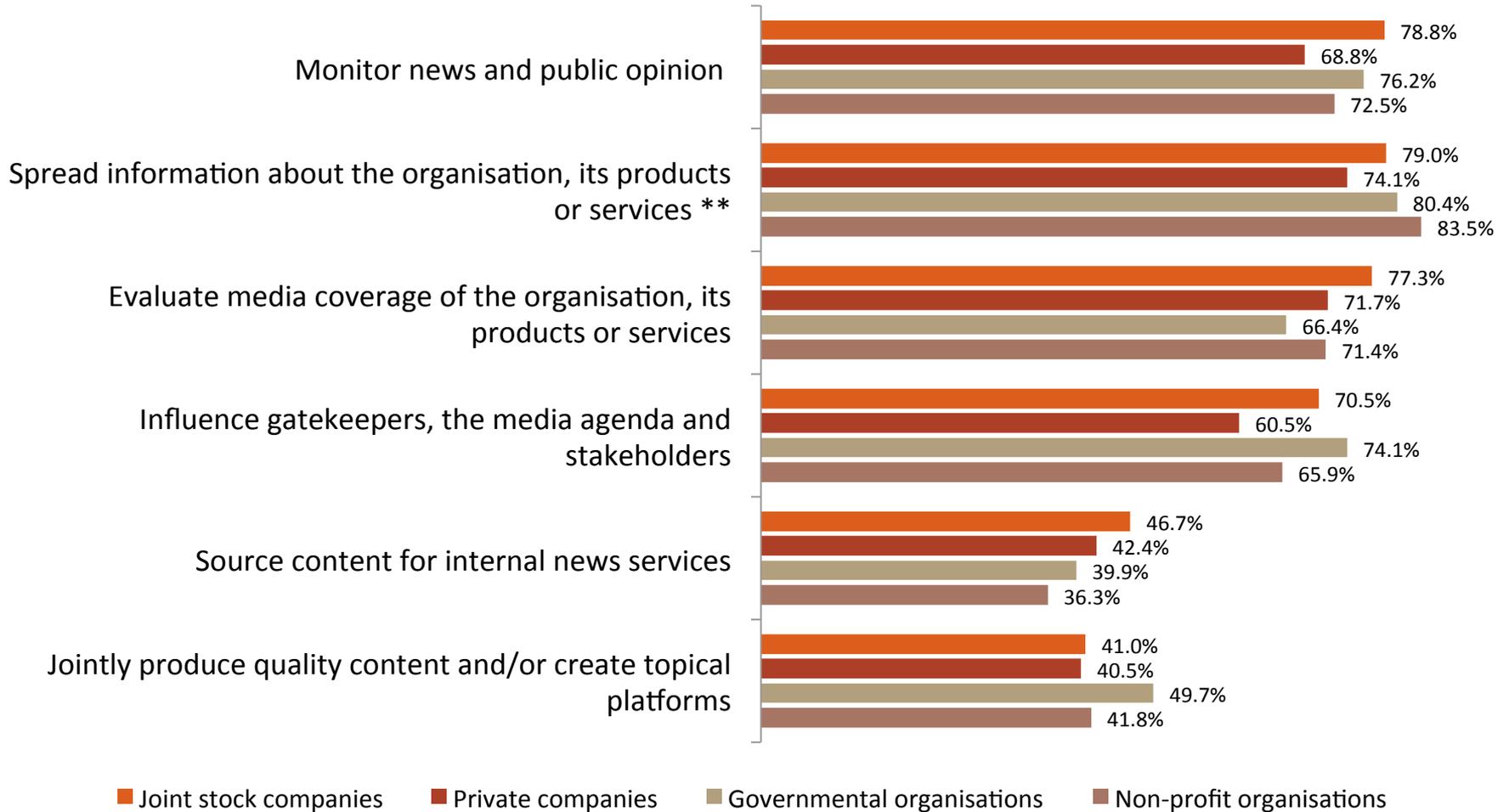
## No significant variances in the assessment of media in different types of organisations

Communication professionals working in ...	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Using earned media publicity	3.94	3.92	3.81	3.92
Using owned media for influencing public opinion	3.47	3.51	3.68	3.57
Using paid media publicity	2.99	3.09	3.23	3.08
Using strategic partnerships with mass media	3.73	3.86	3.76	3.76
Using mass media for influencing public opinion	3.52	3.60	3.49	3.49

## Why organisations in Asia-Pacific interact with the mass media

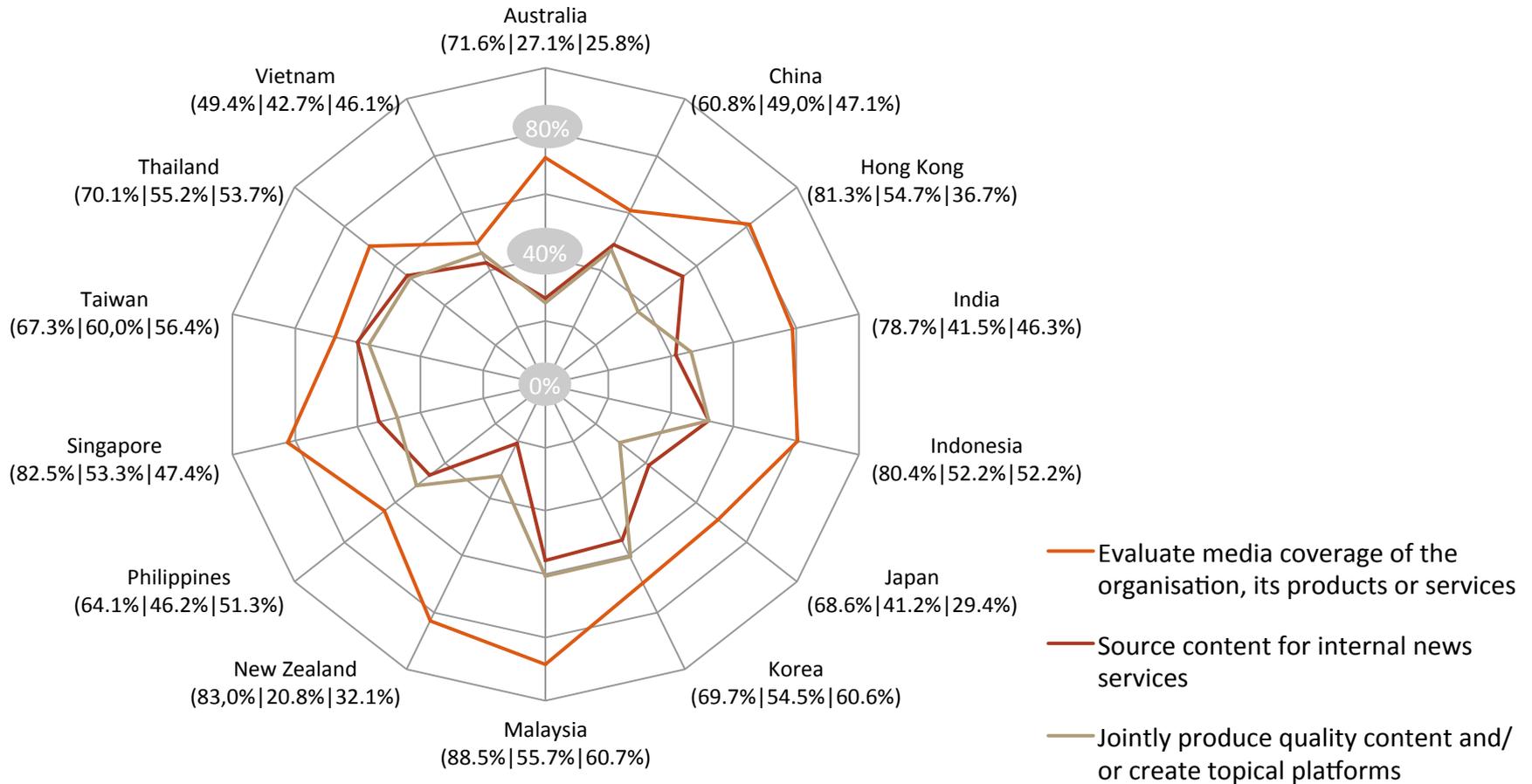


## Use of mass media in different types of organisations



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,195 PR professionals from 23 countries. Q 2: What are the main reasons that your organisation interacts with mass media? Agencies/consultants: Think of your own organisation, not of your clients. My organisation (or our service providers) use mass media and their products to ... Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. \*\* Highly significant difference for mean values (ANOVA/Scheffe post-hoc test, p ≤ 0.01)

# Significant differences for the use of media evaluation, content sourcing and joint content production across Asia-Pacific



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,180 PR professionals from 14 countries. Q 2: What are the main reasons that your organisation interacts with mass media? Agencies/consultants: Think of your own organisation, not of your clients. My organisation (or our service providers) use mass media and their products to ... Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Highly significant differences for all mean values (ANOVA/Scheffe post-hoc test, p ≤ 0.01)



## Communication channels and instruments

## Chapter overview

Social media are now almost level-pegging with traditional media in terms of perceived importance in Asia Pacific, with 75.0 per cent of communication professionals rating social media as important, compared with 76.5 per cent who see traditional media as important. Online communication via Web sites, intranets, and e-mail are also seen as slightly more important (73.6 per cent) than media relations with online newspapers or magazines (73.2 per cent).

When communication professionals look three years into the future to 2018, only 46.9 per cent see traditional media relations with print media and 53.7 per cent see media relations with radio and TV as important. In comparison, 92.2 per cent rate social media such as blogs, Twitter, Weibo, and so on, as important for strategic communication and 85.6 per cent favour websites, intranets and e-mail. This reflects the findings of academic and industry studies of media and public communication (e.g., Bartholomew, 2012; Bruns, 2005, 2008; Duhé, 2012; Macnamara, 2014a; Siapera, 2012).

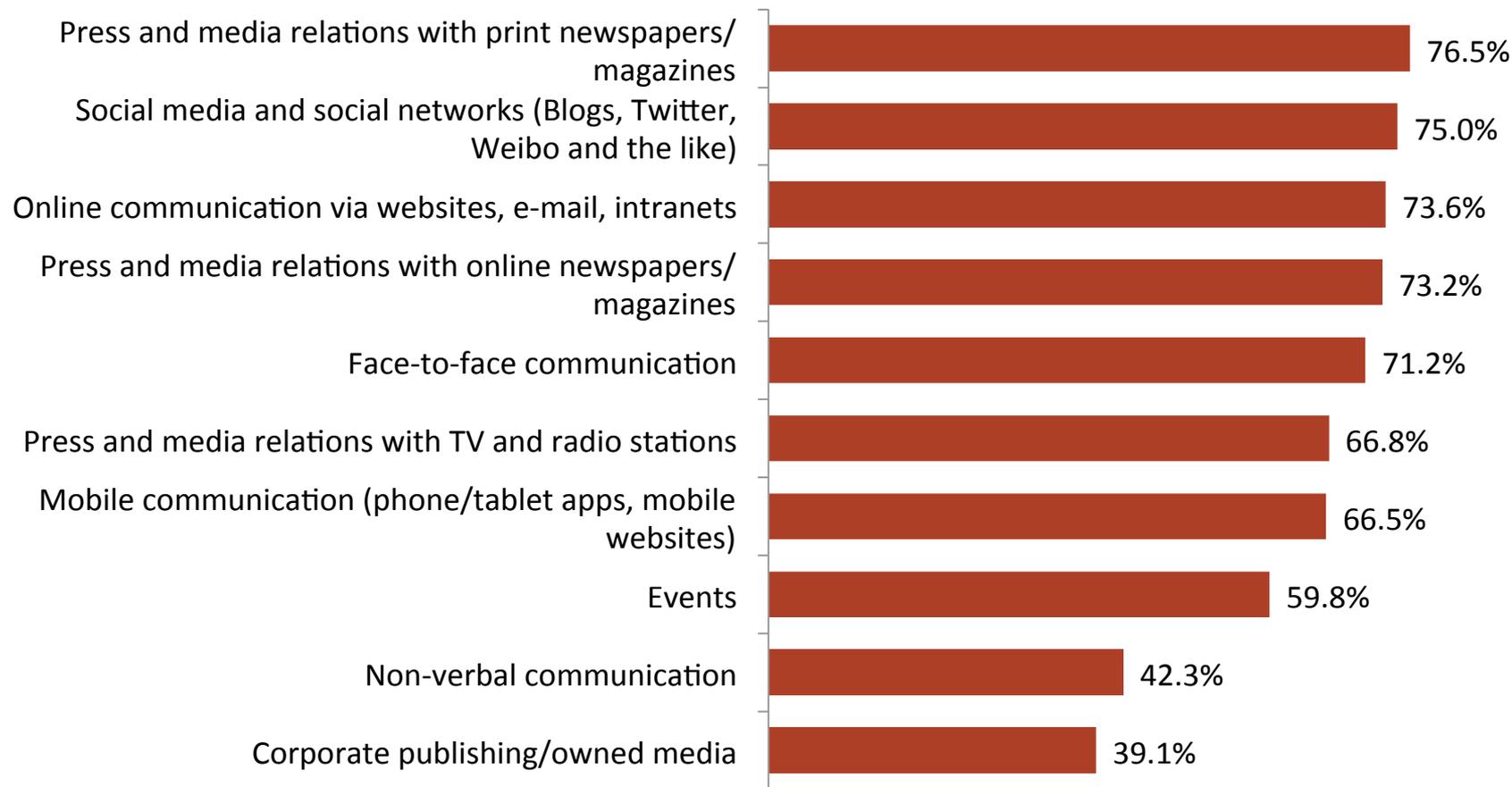
The big movers in Asia Pacific in future will be mobile (phone and tablet apps and mobile-enabled websites) and social media such as blogs, Twitter and Weibo, according to professionals in the region. Almost 94 per cent of Asia Pacific communication professionals see mobile communication as important by 2018, compared with two-thirds of practitioners who see it as important today. Mobile applications are seen as most important in Malaysia, the Philippines, Thailand, and Taiwan, while events also remain important in Malaysia and the Philippines. However, events are seen as declining in importance in most countries, particularly in Australia, New Zealand, and Singapore.

Social media are rated as most important channels in the Philippines, Taiwan, Thailand, Malaysia, Vietnam, and China. Traditional press/media relations remain important in most countries, but are particularly important in Japan, India, and Hong Kong, and Malaysia. In line with the finding reported in the previous section, the perceived importance of owned media will increase from less than 40 per cent of professionals rating them as important in 2015 to 50 per cent saying they will be important by 2018.

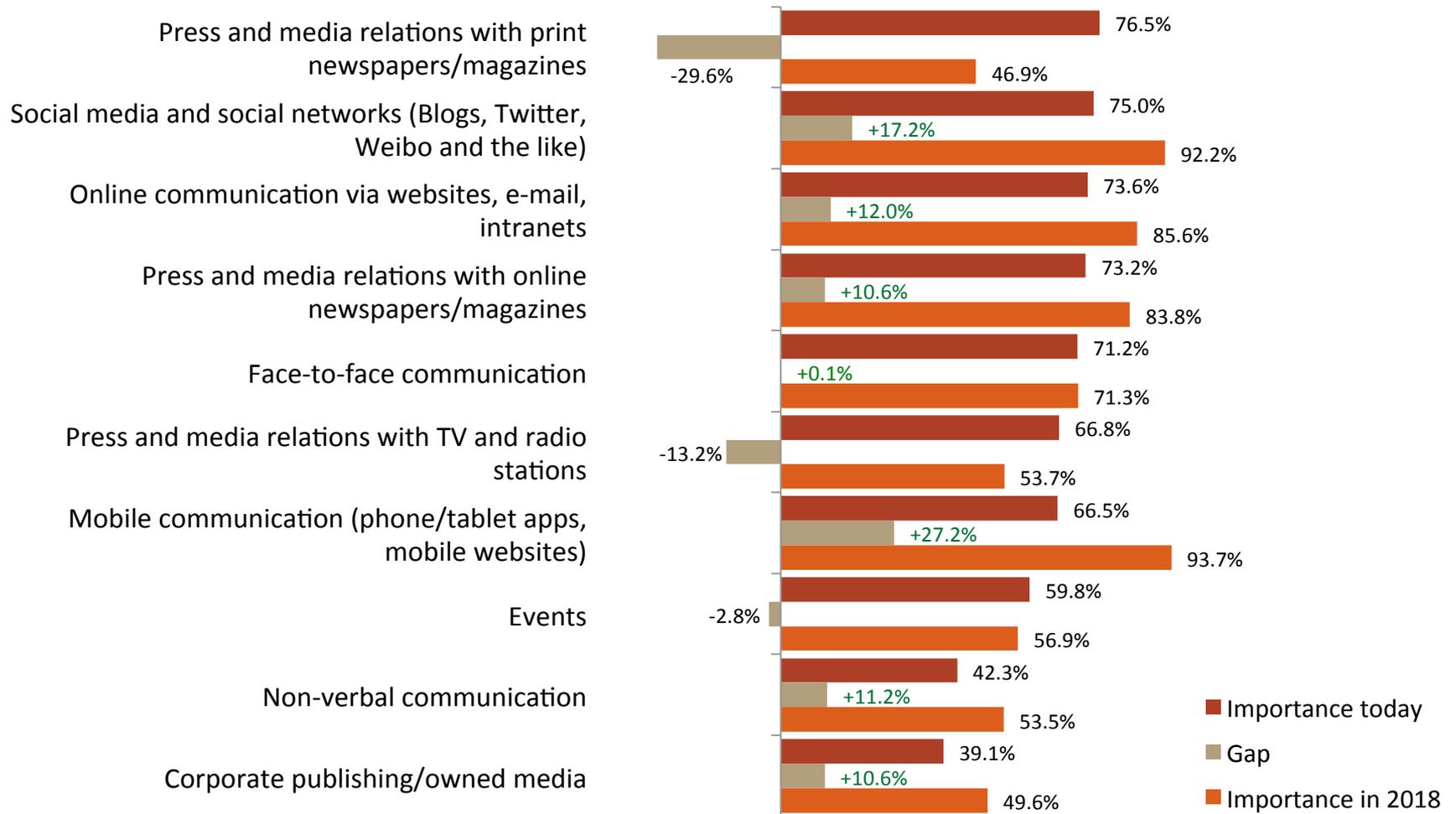
Increasing use of social media potentially expands opportunities for two-way communication and dialogue, which are seen as Best Practice in communication (L. Grunig, J. Grunig, & Dozier, 2002; Kent & Taylor, 2002; Taylor & Kent, 2014) – although the interactive affordances of social media are not always being used by professionals working in corporate and marketing communication, PR, and related fields (Kent, 2013; Wright & Hinson, 2012). As Kent concluded: “If we look at the use of social media by most large corporations, we see that the communication tools that were invented for ‘sociality’ are typically used in a one-way fashion to push messages out to publics” (2013, p. 342). Taylor and Kent also reported that social media use is a “one-way communication process” (2014, p. 386).

Somewhat intriguing is that face-to-face communication is seen as declining in importance in a number of Asian countries between now and 2018, most notably in the Philippines (from 86.8 to 73.7 per cent seeing it as important); Taiwan (from 58 to 48 per cent seeing it as important); Singapore (from 77.1 down to 71.1 per cent); and Malaysia (78.9 down to 72.1 per cent). However, face-to-face communication is seen as growing in importance in Japan, China, Hong Kong, Korea, Indonesia, and New Zealand, and stable in Australia where 80.3 per cent of communication professionals see it as important.

## Importance of various channels and instruments for strategic communication in Asia-Pacific today

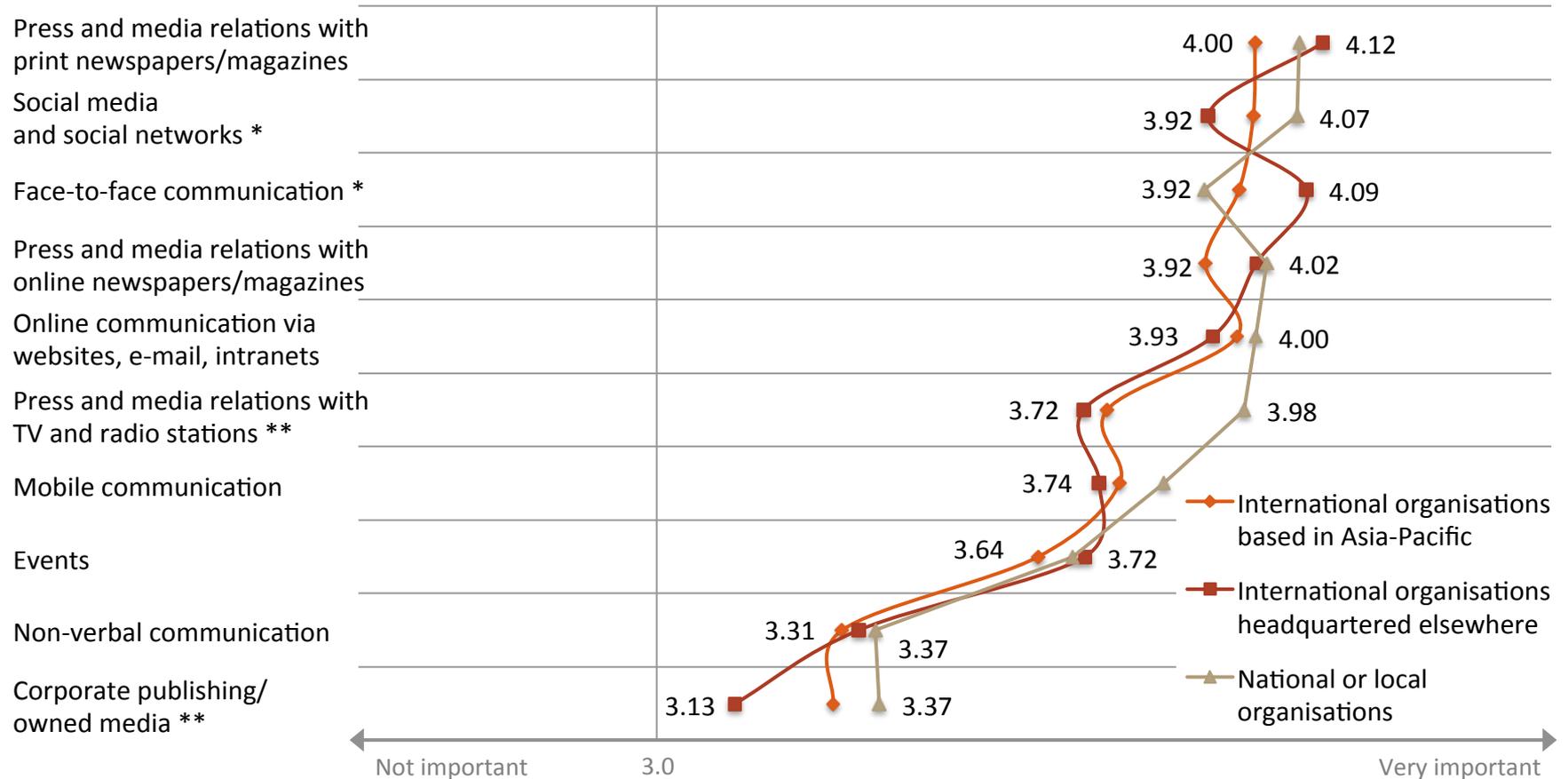


## Expected development of communication channels in Asia-Pacific until 2018



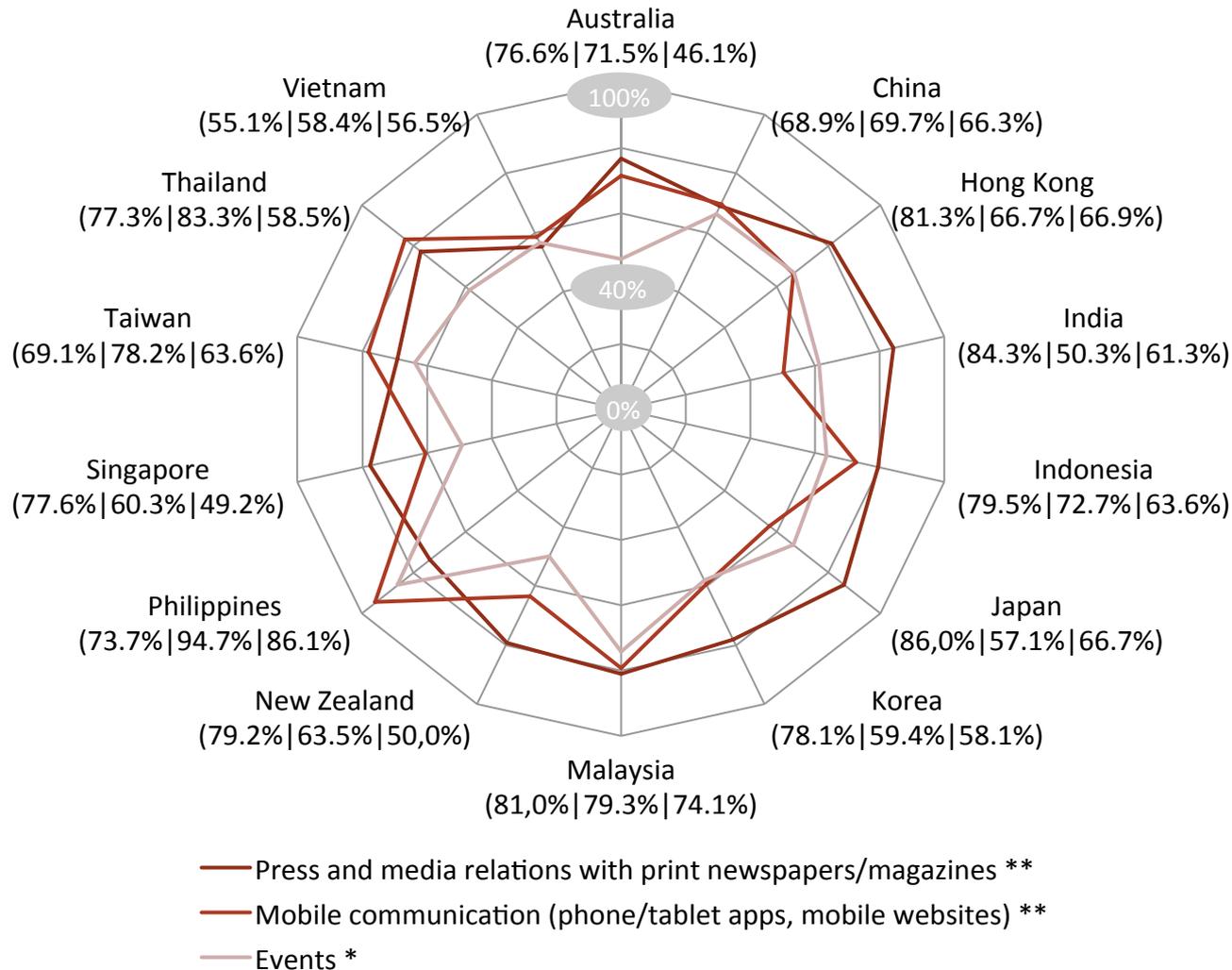
www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 1,148 PR Professionals. Q 4: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.

## Perceptions of channel importance are correlated with the regional background and scope of organisations



www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 1,108 PR professionals. Q4: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5. \*\* Highly significant differences (Kendall rank correlation, p ≤ 0.01). \*\* Significant differences (p ≤ 0.05).

## Different attribution of importance today for print media relations, mobile communication and events across Asia-Pacific



www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 1,134 PR Professionals from 14 countries. Q 4: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.

\*\* Highly significant differences for mean values (ANOVA/Scheffe post-hoc test, p ≤ 0.01) \* Significant differences for mean values (p ≤ 0.05).

## Country-by-country comparison of important communication channels and instruments today

Importance today	Press and media relations with print newspapers/magazines	Social media and social networks (Blogs, Twitter, Weibo and the like)	Online communication via websites, e-mail, intranets	Press and media relations with online newspapers/magazines	Face-to-face communication	Press and media relations with TV and radio stations
Australia	76.6%	73.9%	81.7%	73.0%	80.4%	63.0%
China	68.9%	82.0%	68.7%	74.3%	66.3%	67.3%
Hong Kong	81.3%	69.8%	80.2%	75.0%	70.1%	55.1%
India	84.3%	65.6%	66.7%	61.0%	67.7%	66.3%
Indonesia	79.5%	70.5%	65.9%	90.9%	59.1%	77.3%
Japan	86.0%	55.1%	68.8%	72.9%	77.6%	60.4%
Korea	78.1%	65.6%	62.5%	61.3%	50.0%	75.0%
Malaysia	81.0%	84.5%	86.0%	79.3%	78.9%	86.0%
New Zealand	79.2%	73.1%	80.4%	71.2%	80.8%	71.7%
Philippines	73.7%	89.5%	89.5%	81.6%	86.8%	81.6%
Singapore	77.6%	75.8%	68.9%	70.7%	77.1%	61.1%
Taiwan	69.1%	87.3%	78.2%	80.0%	58.2%	65.5%
Thailand	77.3%	86.4%	78.8%	71.2%	70.8%	69.7%
Vietnam	55.1%	82.0%	60.2%	80.9%	60.2%	70.8%

## Country-by-country comparison of important communication channels and instruments in 2018

Importance in 2018	Press and media relations with print newspapers/magazines	Social media and social networks (Blogs, Twitter, Weibo and the like)	Online communication via websites, e-mail, intranets	Press and media relations with online newspapers/magazines	Face-to-face communication	Press and media relations with TV and radio stations
Australia	38.6%	91.5%	88.2%	76.6%	80.3%	44.7%
China	40.8%	88.1%	71.7%	83.8%	75.0%	42.4%
Hong Kong	52.0%	93.6%	82.3%	89.7%	76.4%	42.4%
India	54.3%	96.3%	90.8%	90.0%	65.8%	64.2%
Indonesia	54.5%	93.3%	88.9%	86.7%	66.7%	62.2%
Japan	51.0%	85.7%	85.4%	87.8%	81.6%	49.0%
Korea	42.4%	84.8%	63.6%	84.4%	57.6%	62.5%
Malaysia	52.5%	96.7%	85.2%	86.7%	72.1%	71.7%
New Zealand	50.0%	94.2%	92.3%	76.5%	84.3%	53.8%
Philippines	55.3%	97.4%	92.1%	86.1%	73.7%	76.3%
Singapore	47.1%	92.5%	89.0%	81.6%	70.1%	46.3%
Taiwan	34.6%	90.6%	83.3%	77.8%	48.1%	46.2%
Thailand	54.8%	92.1%	90.5%	87.3%	66.1%	54.0%
Vietnam	30.7%	87.4%	84.1%	76.1%	64.4%	63.2%

www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 1,131 PR Professionals from 14 countries. Q 4: How important will the following methods in addressing stakeholders, gatekeepers and audiences today be in three years? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.



**Social media  
skills and knowledge**

## Chapter overview

A reason for a lack of use of social media for two-way, dialogic communication, as reported by Kent (2013), Macnamara (2014a), Taylor & Kent (2014), Wright & Hinson (2012) and others, may be to do with the level of skills and knowledge in relation to social media among communication professionals.

While more than 60 per cent of Asia-Pacific communication professionals say they know about social media trends and delivering messages through social media, less than half say they can set up a social media platform (46.5 per cent); evaluate social media activities (44.8 per cent); manage online communities (44.5 per cent); or interpret social media monitoring data (45.2 per cent). Only one-third (33.1 per cent) know the legal framework applying to social media and just 31.8 per cent of Asia Pacific communication professionals say they can initiate web-based dialogue with stakeholders.

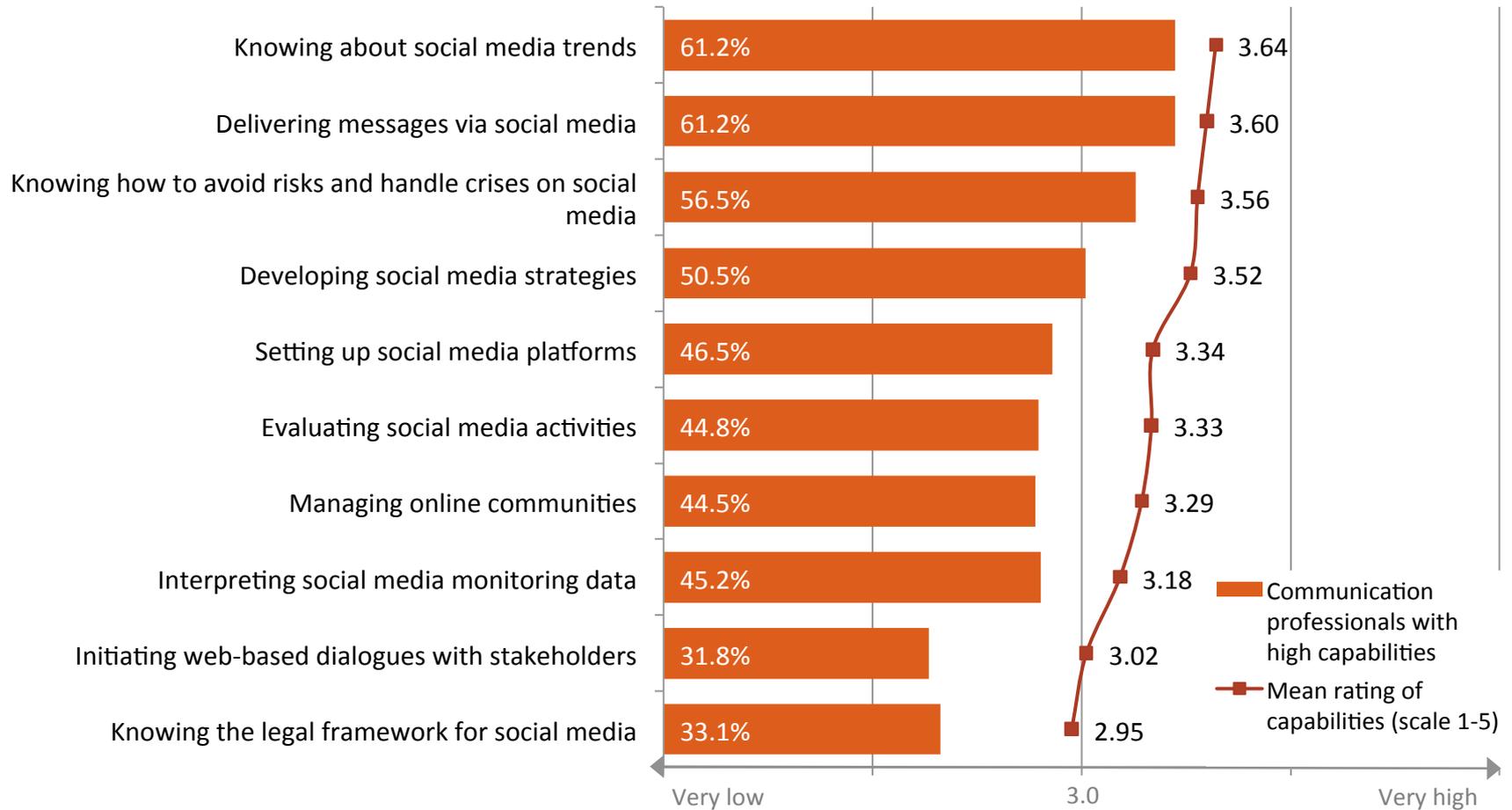
Corporations operating in Asia-Pacific face a particular challenge in social media, as communication professionals in companies report the lowest level of knowledge and skills in these important channels. Professional in agencies and non-profit organisations report the highest levels of social media skills and knowledge. Not surprisingly, specialist online communicators report higher levels of skills and knowledge than communication professionals generally. However, with the popularity and near ubiquitous use of social media, it can be argued that all communication professionals need to have high levels of skills and knowledge in these channel.

Skills and knowledge in relation to social media are relatively consistent across the region, although Taiwan, China, and Indonesia report slightly higher levels. Australia and New Zealand reportedly lag in social media skills and knowledge, which is a concerning finding for these highly developed markets. Some of the highest levels of social media skills and knowledge were reported in Taiwan, the Philippines, and Indonesia in relation to knowing about social media trends, developing social media strategies, and avoiding risks and managing crises in social media. Some of the lowest levels of skills were reported in Hong Kong, Australia, and New Zealand in relation to initiating dialogue with stakeholders online and interpreting social media monitoring data, as well as understanding of the legal framework applying to social media.

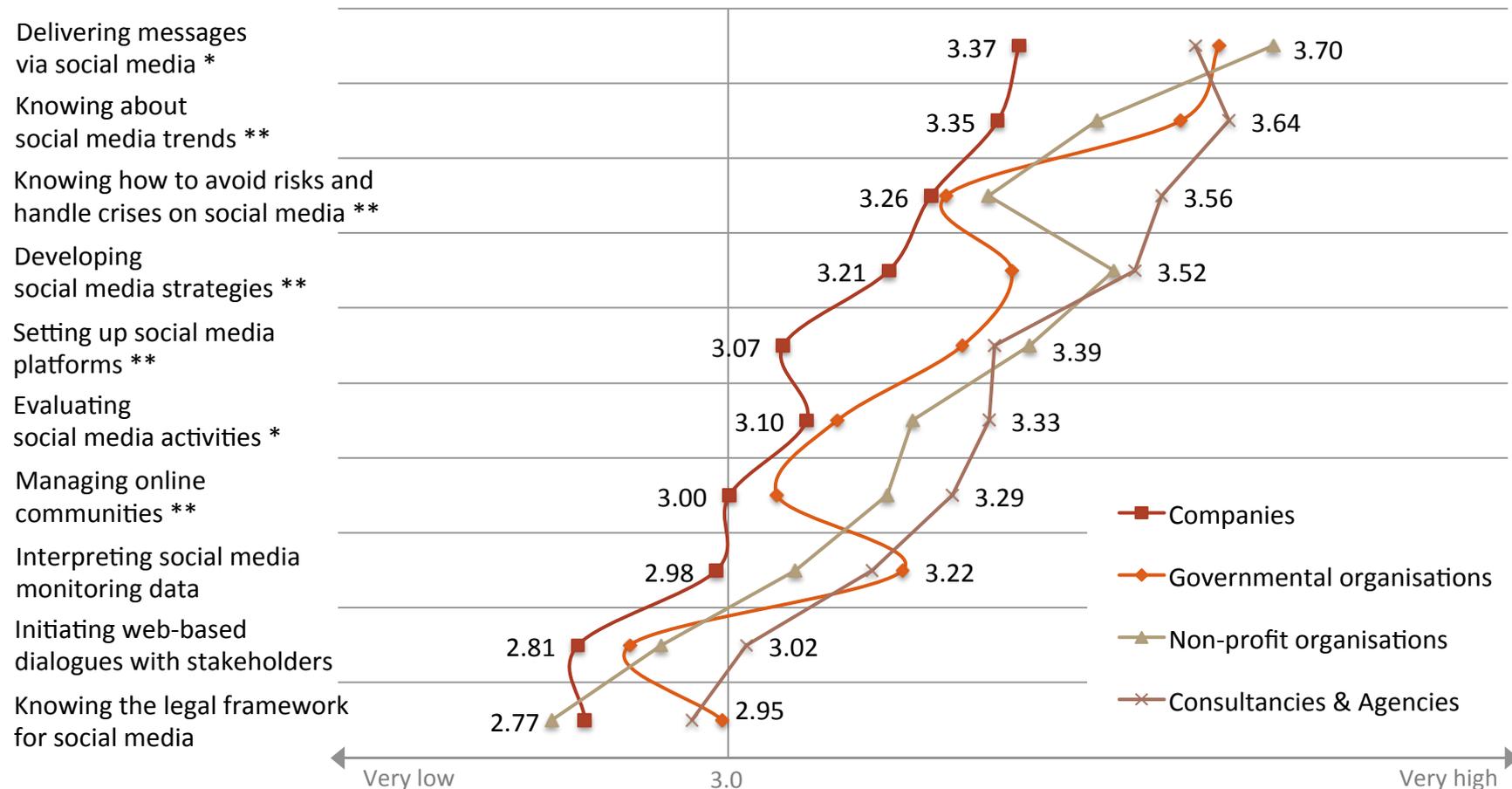
Overall, communication professionals report far more emphasis on delivering messages via social media than initiating dialogue with stakeholders. This illustrates Macnamara's recent research finding that most public communication is focussed on *speaking*, with a lack of attention to *two-way* communication including *listening* (Macnamara, 2013, 2014c, 2016).

What could be described as a disappointing level of skills and knowledge about social media overall explains at least in part why coping with the digital evolution and the social web is identified as the major issue facing professionals between now and 2018 in the next section of this report. Also, the relatively low level of skills and knowledge in relation to interpreting social media monitoring data shows that measurement and evaluation remains an ongoing challenge for communication professionals, as discussed later in this report. These findings reflect skills and knowledge levels reported in the European Communication Monitor studies (Zerfass et al., 2013, pp. 38-49) and suggest that increased professional development is required across the world.

## Social media skills and knowledge: Communication professionals in Asia-Pacific report moderate capabilities

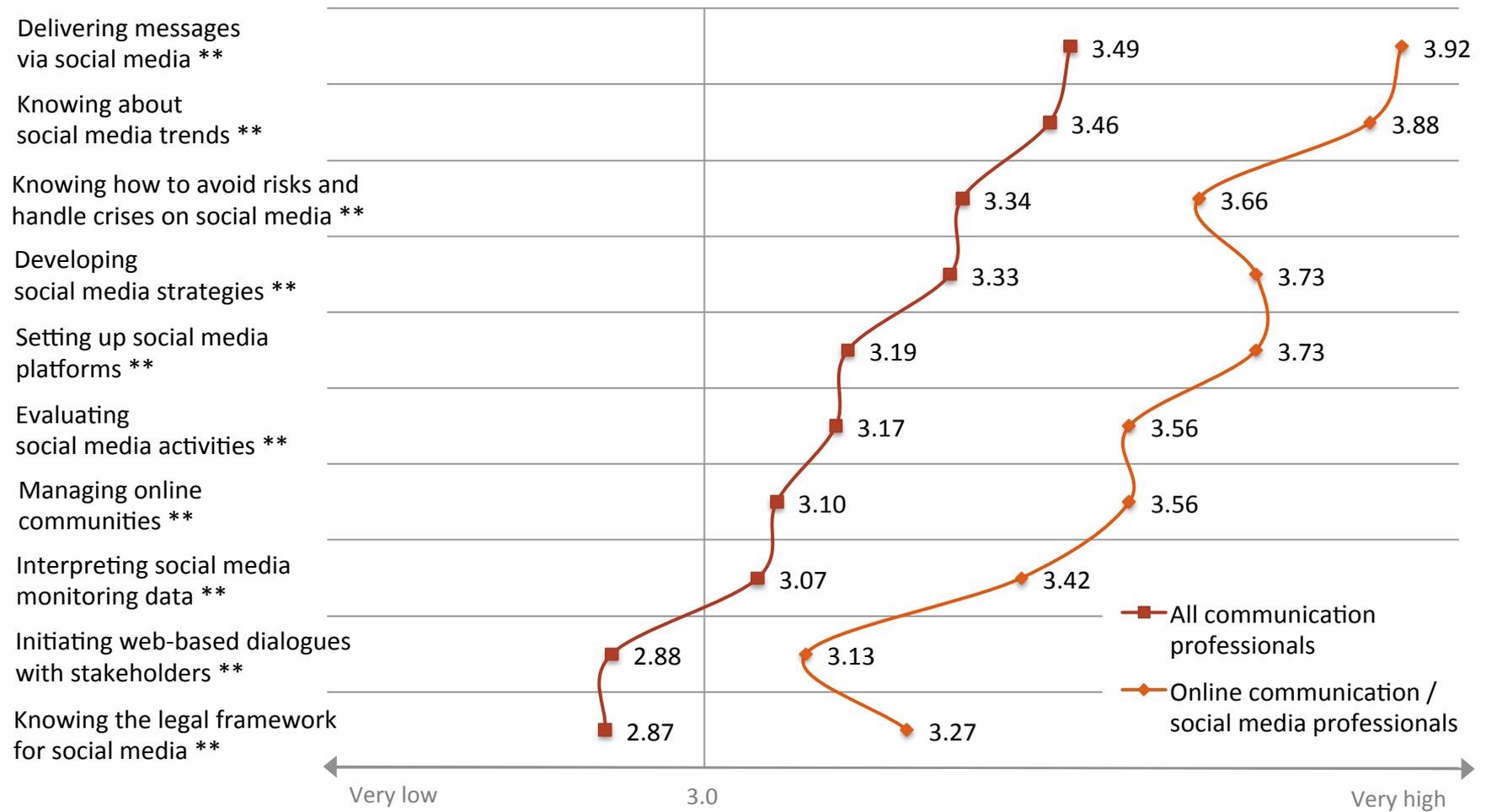


## Professionals working in agencies and non-profit organisations report the highest level of social media skills; companies are lagging behind



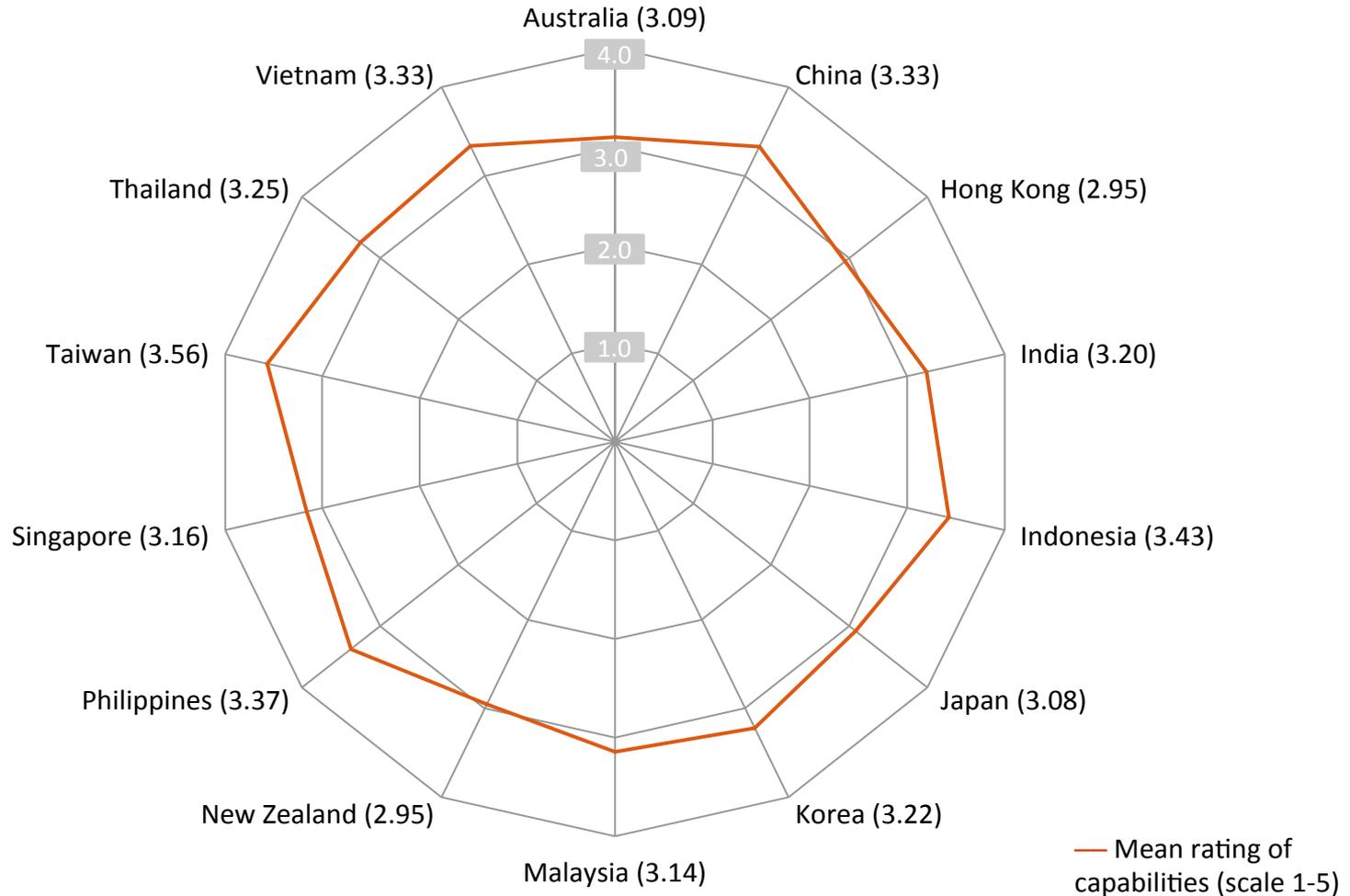
www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,200 PR professionals from 23 countries. Q 5: How would you rate your capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. \*\* Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01). \* Significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05).

## Online communication practitioners are ahead of peers working in other areas



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,200 PR professionals from 23 countries. Q 5: How would you rate your capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. \*\* Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01). \* Significant differences (ANOVA/Scheffe post hoc test, p ≤ 0.05).

## Country-by-country comparison: Social media capabilities reported by communication practitioners in Asia-Pacific



## Social media capabilities of communication practitioners in key countries

	Delivering messages via social media	Knowing about social media trends	Knowing how to avoid risks and handle crises on social media	Developing social media strategies	Setting up social media platforms
Australia	3.44	3.28	3.44	3.33	3.09
China	3.66	3.50	3.39	3.40	3.44
Hong Kong	3.23	3.27	3.08	3.07	2.98
India	3.49	3.52	3.23	3.40	3.32
Indonesia	3.41	3.65	3.65	3.78	3.33
Japan	3.24	3.29	3.47	3.10	2.90
Korea	3.52	3.64	3.58	3.39	3.00
Malaysia	3.50	3.39	3.10	3.23	2.98
New Zealand	3.34	3.23	3.23	2.98	2.85
Philippines	3.82	3.72	3.62	3.56	3.31
Singapore	3.46	3.44	3.39	3.28	3.27
Taiwan	3.78	3.89	3.58	3.53	3.53
Thailand	3.63	3.58	3.33	3.30	3.28
Vietnam	3.66	3.59	3.32	3.53	3.23

## Social media capabilities of communication practitioners in key countries (continued)

	Evaluating social media activities	Managing online communities	Interpreting social media monitoring data	Initiating web-based dialogues with stakeholders	Knowing the legal framework for social media
Australia	2.88	2.92	2.95	2.74	2.87
China	3.33	3.28	3.34	2.91	3.05
Hong Kong	2.99	2.79	2.88	2.63	2.58
India	3.31	3.10	2.96	2.97	2.71
Indonesia	3.54	3.15	3.46	3.02	3.28
Japan	3.06	3.02	2.96	2.86	2.88
Korea	3.15	2.88	3.27	2.67	3.12
Malaysia	3.31	3.24	3.06	2.87	2.76
New Zealand	2.81	2.68	2.79	2.75	2.89
Philippines	3.49	3.10	3.36	2.90	2.87
Singapore	3.12	3.07	2.99	2.84	2.75
Taiwan	3.55	3.65	3.36	3.56	3.20
Thailand	3.18	3.27	3.12	2.90	2.96
Vietnam	3.27	3.41	3.22	3.00	3.11



**Strategic issues and  
value contribution**

## Chapter overview

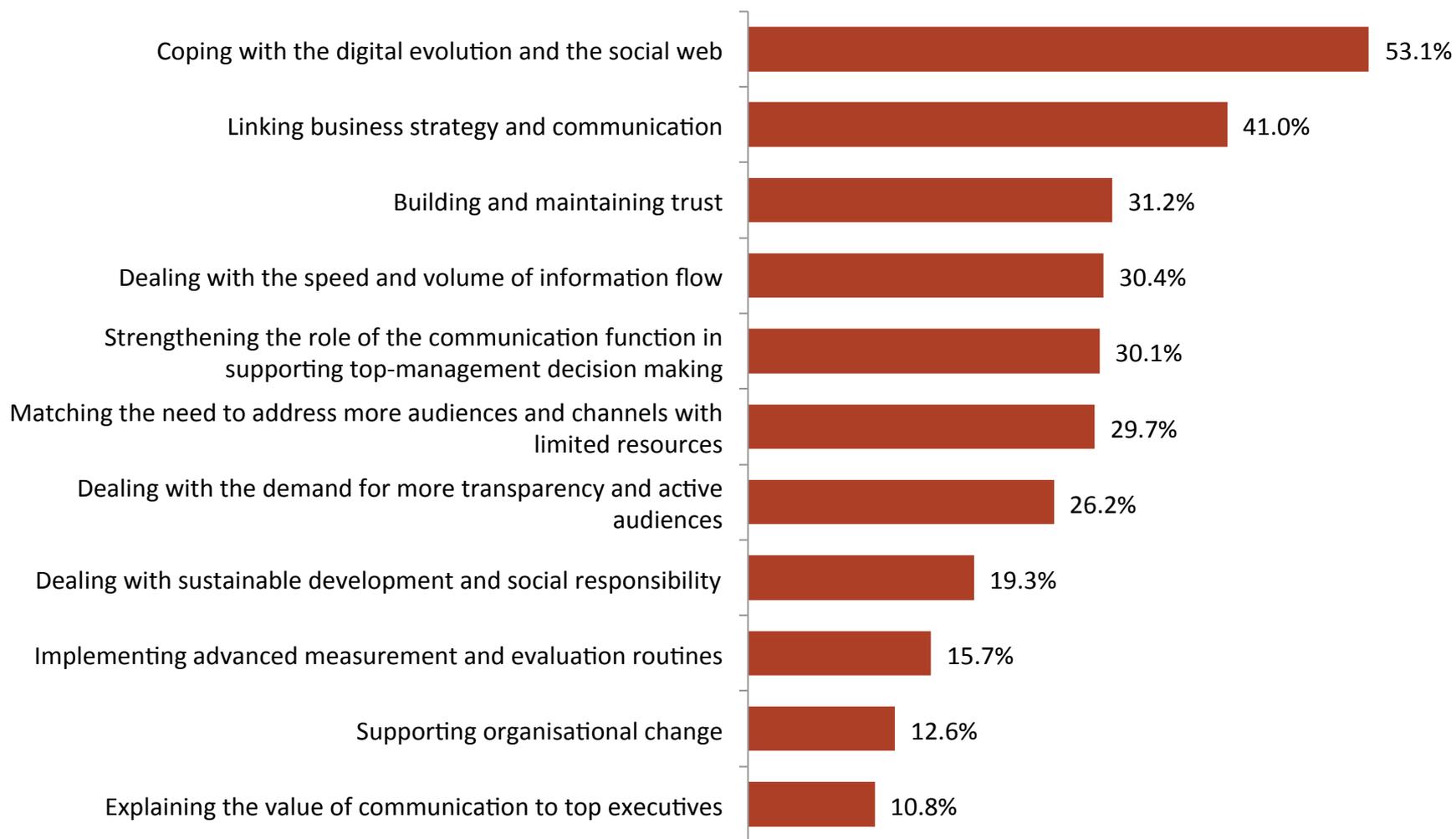
Given the finding that communication professionals in Asia-Pacific see social media and mobile communications as the most important developments in the field, and the modest levels of social media skills and knowledge reported, it is perhaps not surprising that coping with the digital evolution and social web is perceived as the most important issue for communication management in Asia-Pacific over the next three years (53.1 per cent). This contrasts with findings of the European Communication Monitor in 2014 and 2015 where linking business strategy and communication was seen as the most important issue for communication management (Zerfass et al., 2014, 2015). In Asia Pacific, linking communication to business strategy, including showing the contribution of communication to organisational outcomes, is seen as the second most important issue for communication management (41.0 per cent).

Consultancies, agencies and non-profit organisations are most concerned about coping with the digital evolution and social web, while companies are most concerned about linking business strategy and communication, along with consultancies and agencies which share this concern. Coping with the digital evolution and social web is seen as most important in the Philippines, India, and China, while linking business strategy and communication is seen as most important in Japan, Singapore, and Vietnam.

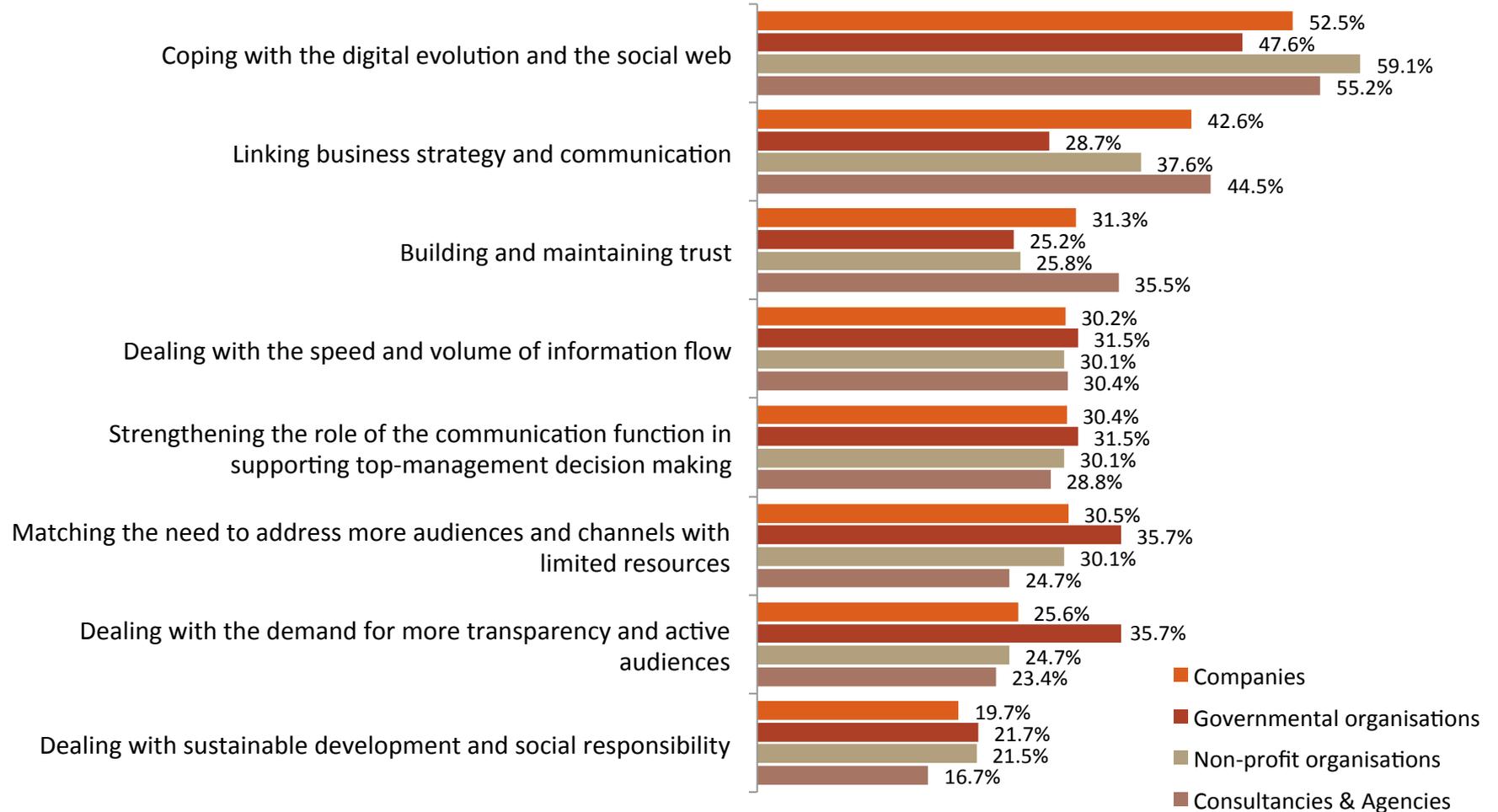
Communication professionals in Asia-Pacific are at one with their European colleagues in seeing building and maintaining trust as the third most important issues for communication management. Of concern, particularly in light of findings in relation to the types of measurement and evaluation undertaken as reported in the next section, is that implementing advanced measurement and evaluation is rated as the most important issue for management by only 15.7 per cent of communication professionals in the region – a near identical finding to that in the 2015 European survey (Zerfass et al., 2015, p. 40). When it comes to explaining the value of communication, most Asia-Pacific communication professionals do so in terms of positive effects on reputation, organisational culture and brands (79.8 per cent); the role of content on thought leadership for organisational goals (70.1 per cent); and illustrating the benefits of listening to stakeholders and identifying opportunities (67.7 per cent). The previous point appears to contradict the finding that communication professionals are focussed on delivering messages rather than initiating dialogue with stakeholders, as reported under ‘Social Media Skills and Knowledge’. However, listening is reported mainly in connection with “identifying opportunities” for the organisation – what Macnamara (2014c, p. 99; 2016, p. 236) calls an “instrumental” form of listening that is primarily undertaken to serve the organisation’s interests.

Reputation is a particularly high priority in the Philippines (92.3 per cent); New Zealand (86.8 per cent); Australia (86.5 per cent); Indonesia (82.6 per cent); Singapore (81.8 per cent); India (81.7 per cent); Malaysia (80.6 per cent); and Japan (80.4 per cent), followed closely by Hong Kong, Korea, and Taiwan. Economic impact is most important in the Philippines (84.6 per cent), while demonstrating thought leadership is important in Malaysia (83.9 per cent); the Philippines (76.9 per cent); Hong Kong (75.8 per cent); and India (75.6 per cent). Overall, only 60.8 per cent of Asia Pacific communication professionals attempt to demonstrate positive economic consequences such as effects on sales or employee motivation and productivity.

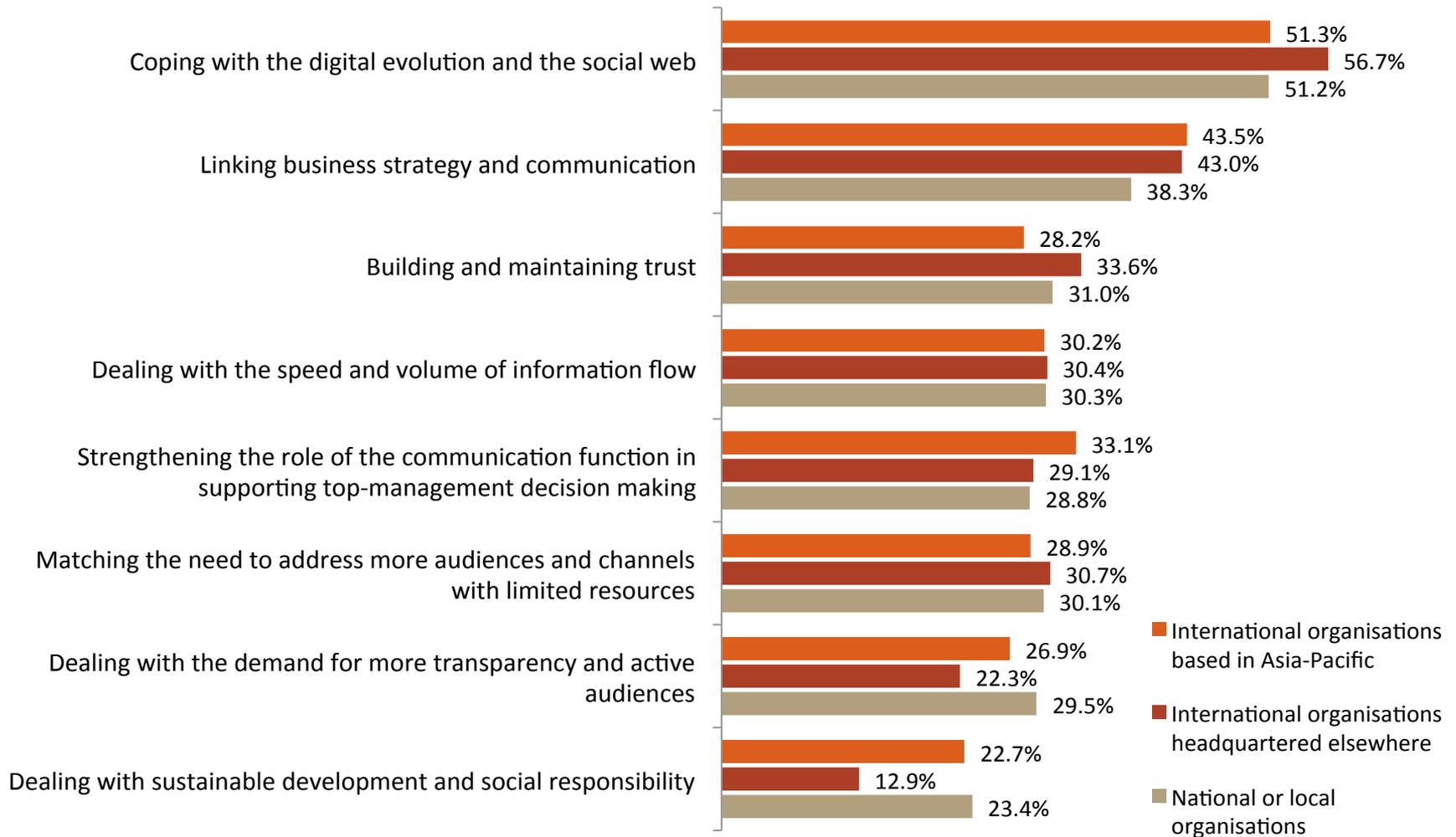
## Most important issues for communication management in Asia-Pacific until 2018



## Most important issues for communication management in different types of organisations



## Organisations with different regional background and scope rate important issues mostly similar – but CSR, transparency, and trust are valued differently



## Country-to-country relevance of key issues



## Country-to-country ranking of most important issues for communication management until 2018

	Australia	China	Hong Kong	India	Indonesia	Japan	Korea
Coping with the digital evolution and the social web	1. (44.9%)	1. (58.7%)	1. (57.0%)	1. (67.7%)	1. (52.2%)	3. (35.3%)	3. (39.4%)
Linking business strategy and communication	2. (39.7%)	2. (40.4%)	2. (39.1%)	2. (48.8%)	2. (43.5%)	1. (66.7%)	6. (27.3%)
Building and maintaining trust	7. (24.4%)	3. (36.5%)	4. (32.8%)	4. (29.9%)	4. (37.0%)	2. (43.1%)	1. (51.5%)
Dealing with the speed and volume of information flow	4. (35.9%)	7. (22.1%)	3. (35.9%)	5. (28.7%)	5. (23.9%)	8. (17.6%)	8. (15.2%)
Strengthening the role of the communication function in supporting top-management decision making	6. (27.6%)	6. (25.0%)	6. (29.7%)	3. (32.9%)	3. (43.5%)	4. (25.5%)	2. (42.4%)
Matching the need to address more audiences and channels with limited resources	3. (39.7%)	4. (29.8%)	5. (31.3%)	6. (25.6%)	10. (10.9%)	4. (25.5%)	7. (24.2%)
Dealing with the demand for more transparency and active audiences	5. (28.2%)	5. (26.9%)	7. (21.9%)	7. (18.9%)	6. (23.9%)	10. (13.7%)	4. (30.3%)
Dealing with sustainable development and social responsibility	10. (7.1%)	8. (21.2%)	9. (13.3%)	9. (15.2%)	7. (23.9%)	6. (23.5%)	4. (30.3%)
Implementing advanced measurement and evaluation routines	9. (21.8%)	10. (13.5%)	8. (15.6%)	8. (16.5%)	8. (21.7%)	11. (11.8%)	10. (12.1%)
Supporting organisational change	8. (23.7%)	11. (10.6%)	10. (12.5%)	11. (5.5%)	11. (4.3%)	7. (21.6%)	10. (12.1%)
Explaining the value of communication to top executives	11. (7.1%)	9. (15.4%)	11. (10.9%)	10. (10.4%)	9. (15.2%)	9. (15.7%)	9. (15.2%)

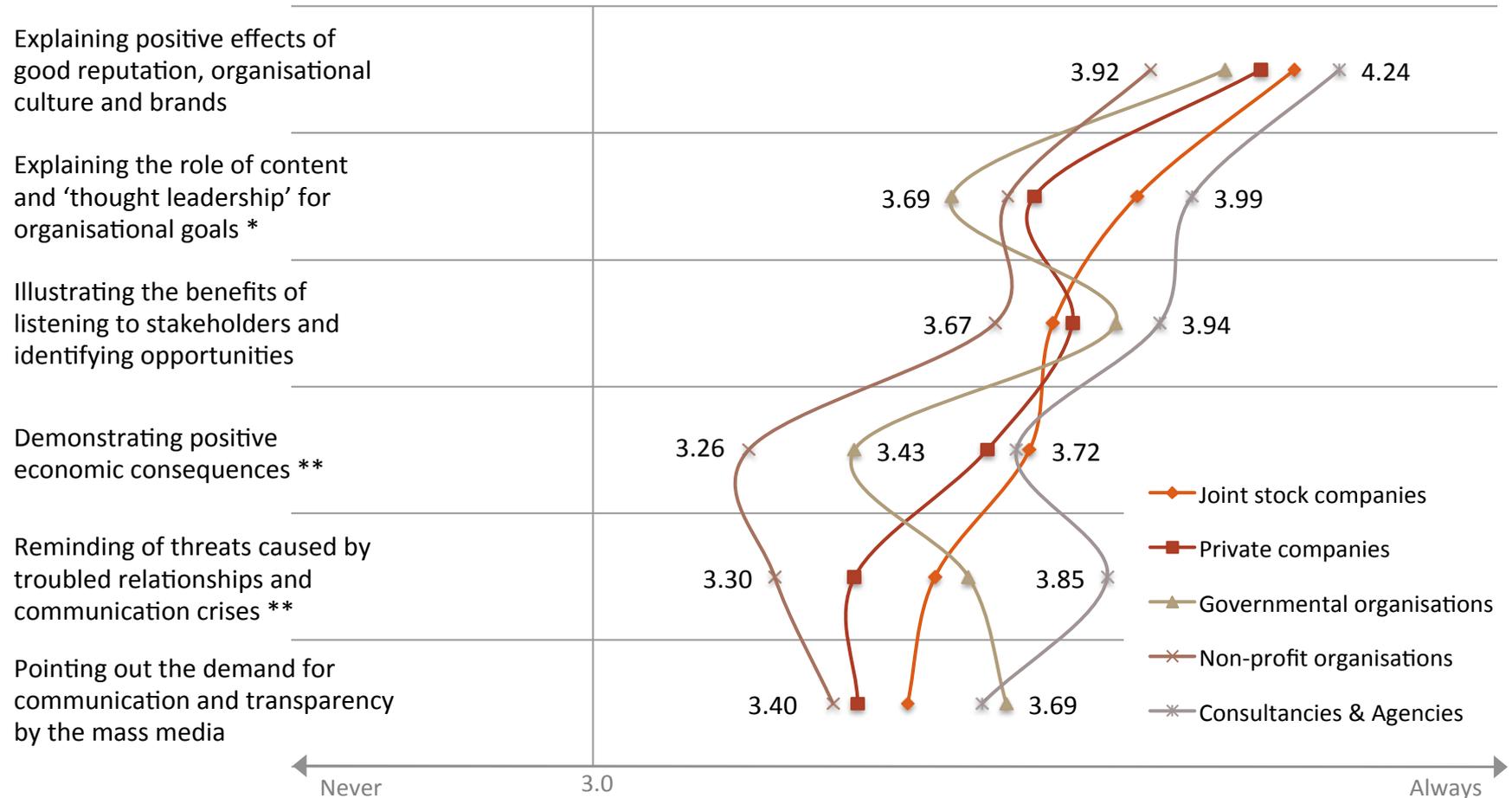
## Country-to-country ranking of most important issues for communication management until 2018 (continued)

	Malaysia	New Zealand	Philippines	Singapore	Taiwan	Thailand	Vietnam
Coping with the digital evolution and the social web	1. (54.8%)	1. (52.8%)	1. (69.2%)	1. (53.3%)	1. (49.1%)	1. (46.3%)	2. (42.2%)
Linking business strategy and communication	2. (35.5%)	7. (22.6%)	8. (17.9%)	2. (43.1%)	2. (38.2%)	2. (38.8%)	1. (45.6%)
Building and maintaining trust	7. (24.2%)	6. (24.5%)	4. (30.8%)	7. (24.1%)	8. (23.6%)	3. (32.8%)	3. (41.1%)
Dealing with the speed and volume of information flow	2. (35.5%)	2. (45.3%)	3. (35.9%)	5. (30.7%)	4. (34.5%)	3. (32.8%)	6. (24.4%)
Strengthening the role of the communication function in supporting top-management decision making	2. (35.5%)	5. (26.4%)	7. (23.1%)	3. (37.2%)	6. (27.3%)	7. (28.4%)	7. (21.1%)
Matching the need to address more audiences and channels with limited resources	5. (33.9%)	4. (37.7%)	6. (25.6%)	4. (32.8%)	5. (32.7%)	5. (31.3%)	8. (17.8%)
Dealing with the demand for more transparency and active audiences	6. (29.0%)	2. (47.2%)	5. (28.2%)	6. (28.5%)	7. (25.5%)	8. (23.9%)	5. (30.0%)
Dealing with sustainable development and social responsibility	8. (19.4%)	8. (15.1%)	2. (38.5%)	10. (10.2%)	2. (38.2%)	6. (29.9%)	4. (34.4%)
Implementing advanced measurement and evaluation routines	9. (12.9%)	9. (13.2%)	9. (15.4%)	8. (18.2%)	11. (7.3%)	10. (11.9%)	10. (14.4%)
Supporting organisational change	10. (9.7%)	10. (9.4%)	10. (10.3%)	10. (10.2%)	9. (14.5%)	11. (10.4%)	8. (17.8%)
Explaining the value of communication to top executives	10. (9.7%)	11. (5.7%)	11. (5.1%)	9. (11.7%)	10. (9.1%)	9. (13.4%)	11. (11.1%)

## Explaining communication value: How professionals in Asia-Pacific argue for the relevance of communication to top executives or (internal) clients



## Explaining the value of communication: significant differences between various types of organisations



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,200 PR professionals from 23 countries. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). \*\* Highly significant differences (ANOVA/ Scheffe post-hoc test, p ≤ 0.01). \* Significant differences (ANOVA/Scheffe post hoc test, p ≤ 0.05).

## Communication value explained by professionals in different countries

	Explaining positive effects of good reputation, organisational culture and brands	Explaining the role of content and 'thought leadership' for organisational goals	Illustrating the benefits of listening to stakeholders and identifying opportunities	Demonstrating positive economic consequences (e.g. effects on sales or employee motivation)	Reminding of threats caused by troubled relationships and communication crises	Pointing out the demand for communication and transparency by the mass media
Australia	82.2%	67.1%	82.2%	74.0%	52.1%	42.5%
China	74.2%	59.7%	64.5%	50.0%	56.5%	54.8%
Hong Kong	76.9%	73.6%	53.8%	59.3%	54.9%	48.4%
India	86.5%	77.9%	69.2%	65.4%	51.0%	64.4%
Japan	72.7%	57.6%	45.5%	48.5%	57.6%	45.5%
Malaysia	82.9%	88.6%	62.9%	68.6%	57.1%	60.0%

## Communication value explained by professionals in different countries (continued)

	Explaining positive effects of good reputation, organisational culture and brands	Explaining the role of content and 'thought leadership' for organisational goals	Illustrating the benefits of listening to stakeholders and identifying opportunities	Demonstrating positive economic consequences (e.g. effects on sales or employee motivation)	Reminding of threats caused by troubled relationships and communication crises	Pointing out the demand for communication and transparency by the mass media
New Zealand	72.7%	81.8%	72.7%	63.6%	54.5%	27.3%
Philippines	92.6%	77.8%	81.5%	92.6%	77.8%	85.2%
Singapore	79.7%	75.9%	73.4%	68.4%	46.8%	55.7%
Taiwan	76.2%	61.9%	81.0%	66.7%	57.1%	66.7%
Thailand	82.5%	75.0%	70.0%	60.0%	47.5%	62.5%
Vietnam	69.8%	62.8%	48.8%	58.1%	58.1%	53.5%



## Measurement and evaluation in communication departments

## Chapter overview

Measurement and evaluation has been a long-running debate and challenge in professional communication practice, as reported by Likely and Watson (2013), Macnamara (2015b), Watson (2012), Watson and Noble (2014), and others. Over the past five years the European Communication Monitor has reviewed measurement and evaluation based on four stages – inputs, outputs, outcomes, and outflows (DPRG & ICV, 2011; Zerfass, 2010; Watson & Noble, 2014). To allow global comparison, this framework was used in examining the views and practices of Asia-Pacific communication professionals in relation to measurement and evaluation – although it is noted that some researchers split outcomes into direct outcomes and organisational or business outcomes, the latter being the same as what others call outflows (GCS, 2015; PRIA, 2014). Some add outtakes to the model and define four or more stages of communication management including inputs, outputs, outtakes, outcomes, and outflows or impact (GCS, 2015; Macnamara, 2015b; PRIA, 2014).

Gregory and Watson (2008) noted a “stasis” in measurement and evaluation and, more recently, Michaelson and Stacks reported that “public relations practitioners have consistently failed to achieve consensus on what the basic evaluative measures are or how to conduct the underlying research for evaluating and measuring public relations performance” (2011, p. 1). Wright and Hinson (2012) found that that this lack of research has continued in the era of social media.

This is evident in Asia-Pacific as well. Media clippings and response remain the predominant method of measurement and evaluation, used by 85.6 per cent of communication professionals in Asia-Pacific. This exceeds the reliance on clippings and media response in Europe where 82.4 per cent of professionals rely on these methods (Zerfass et al., 2015, p. 72). Asia-Pacific communication professionals also rely heavily on other output measures including internet/intranet use (67.8 per cent) and internal client satisfaction (66.2 per cent).

The second most used metric is understanding of key messages (74.4 per cent), and 65.5 per cent measure stakeholders attitudes and behaviour change, which the ‘communication controlling’ model of evaluation describes as outcomes. Some other evaluation models describe these as outtakes or direct outcomes (as distinct from organisational outcomes or impact).

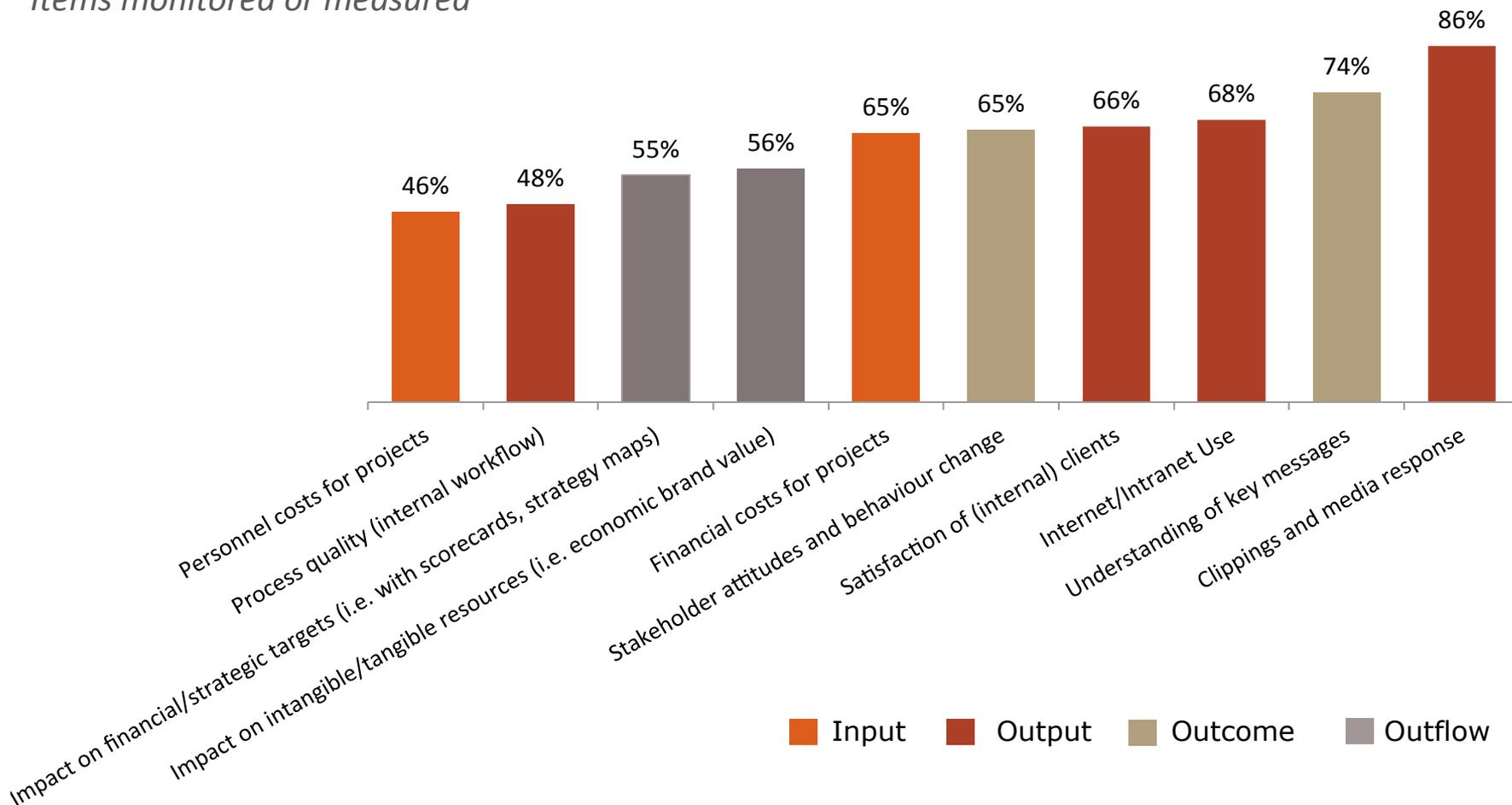
Overall, most focus in measurement and evaluation is on outputs such as production of content and media coverage (76.7 per cent), followed by direct outcomes such as utilisation of information, perceptions, and knowledge (74.7 per cent). Only slightly more than half of communication professionals in Asia-Pacific measure value at an outflow level such as impact on strategic and/or financial targets or tangible or intangible resources. Less than two-third of communication professionals in Asia-Pacific evaluate audience opinion, attitudes, or behavioural disposition (e.g., intentions).

An important factor is that most communication professionals conduct measurement and evaluation to report the success of communication activities, with only 68.5 per cent using this research to provide insights to inform planning. This “looking backwards” approach has been challenged by Macnamara (2015b) in his MAIE model of evaluation, which proposes much greater emphasis on using evaluation research to provide insights to inform organisation strategy.

While media monitoring to collect clippings and measure media response is often outsourced (27.8 per cent), most methods of measurement and evaluation are conducted in-house in Asia Pacific.

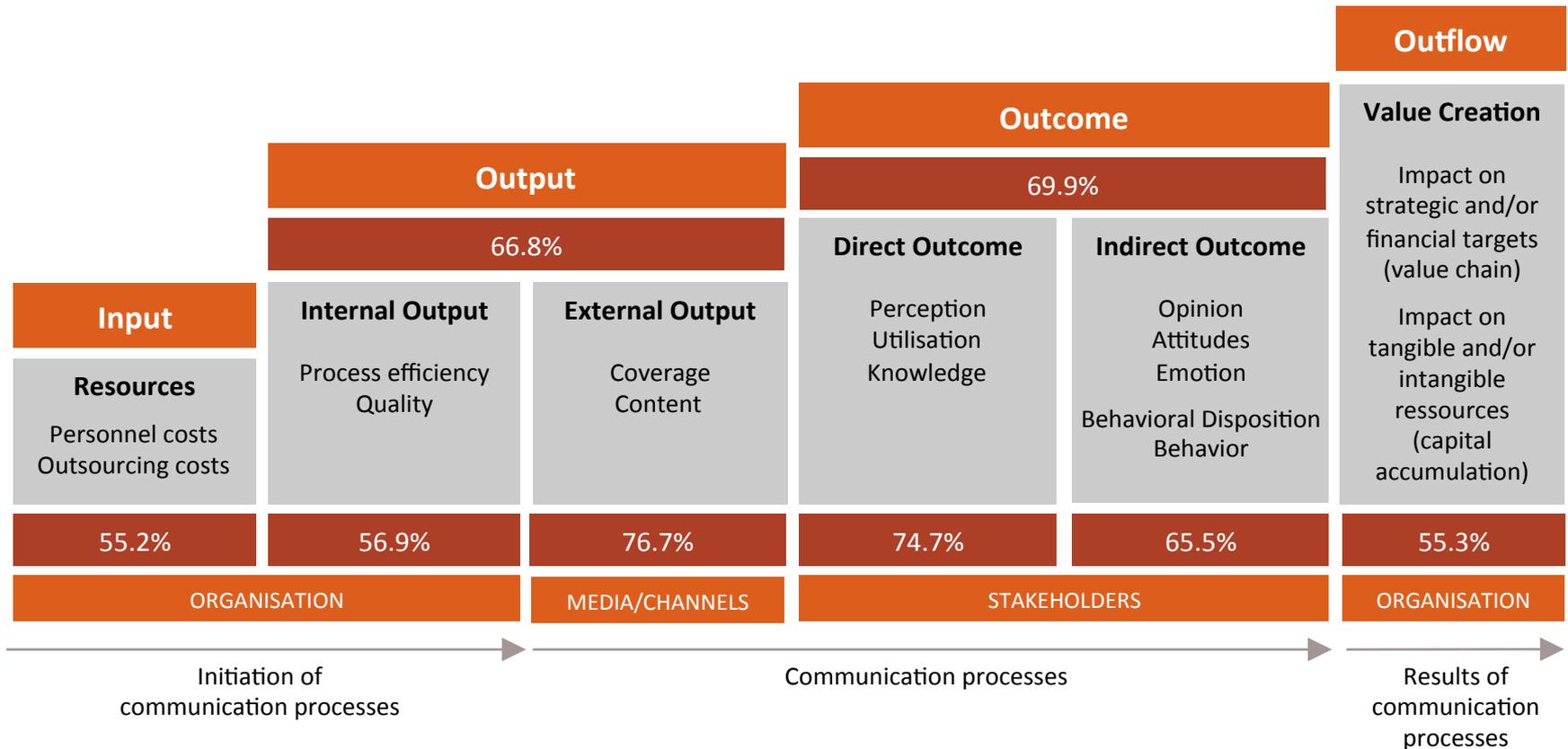
# Measurement and evaluation: How communication departments assess the effectiveness of their activities

*Items monitored or measured*

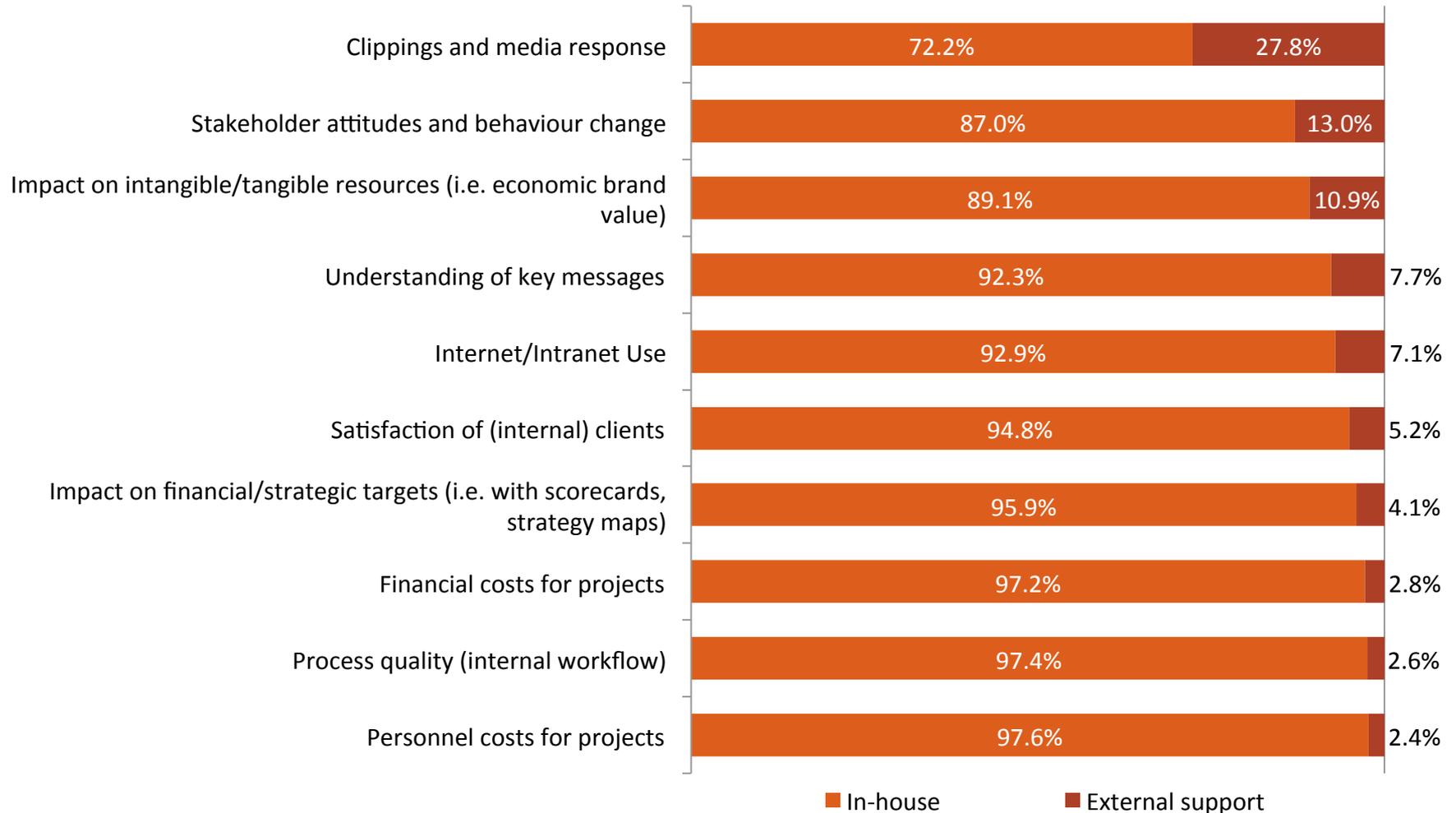


www.communicationmonitor.asia / Macnamara et al. 201 / n<sub>min</sub> = 847 PR professionals in communication departments. Q 7: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Do not use at all) – 5 (Use continuously). Percentages: Frequency based on scale points 4-5.

Many organisations in Asia-Pacific focus only on a small part of the overall process when measuring communication activities

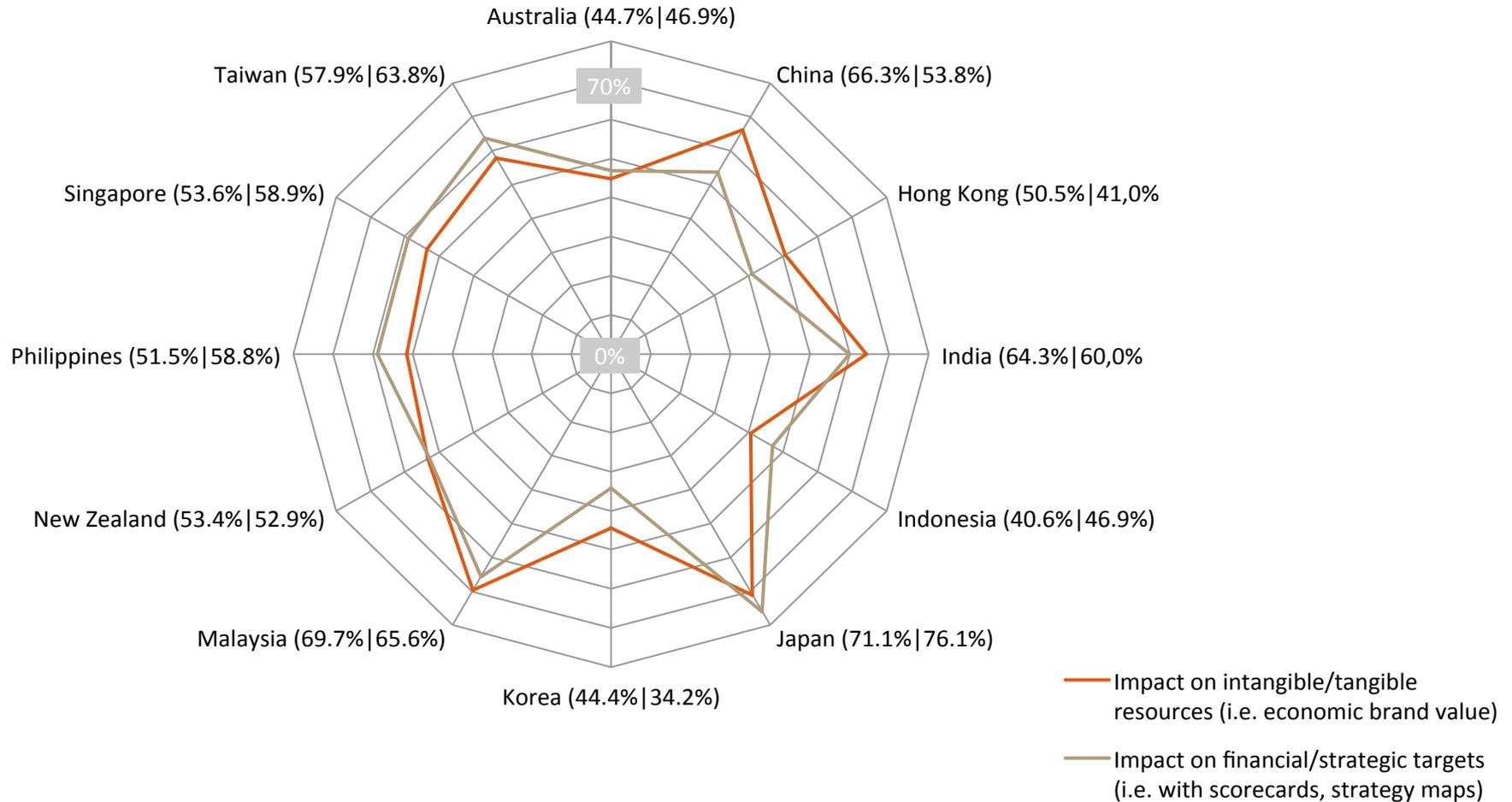


## Communication measurement activities undertaken in-house and supported externally



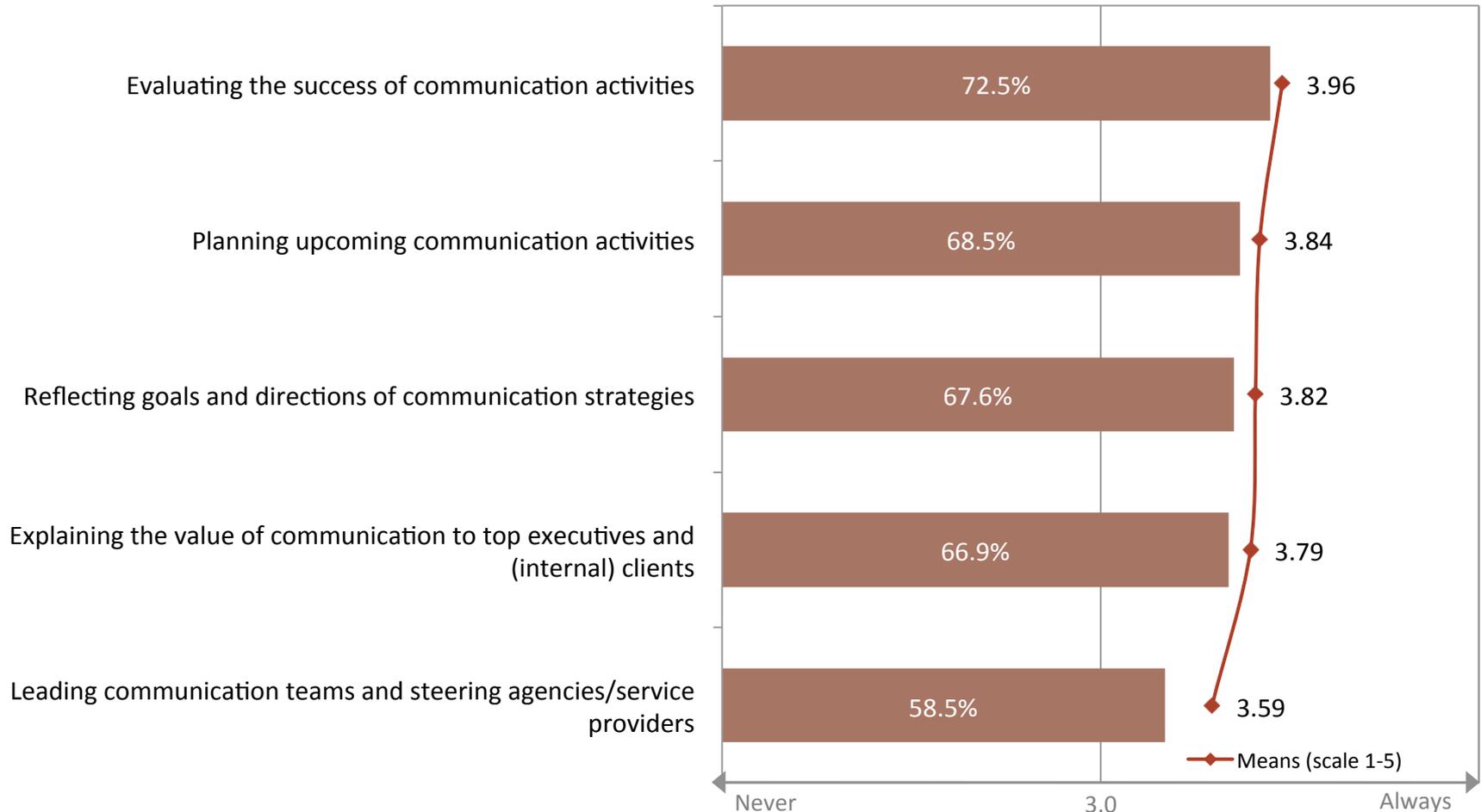
www.communicationmonitor.asia / Macnamara et al. 2015 / n<sub>min</sub> = 847 PR professionals in communication departments. Q7: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Please tick the box on the right if data collection and/or interpretation are supported by external service providers.

## Country-by-country comparison of outflow measurement in communications

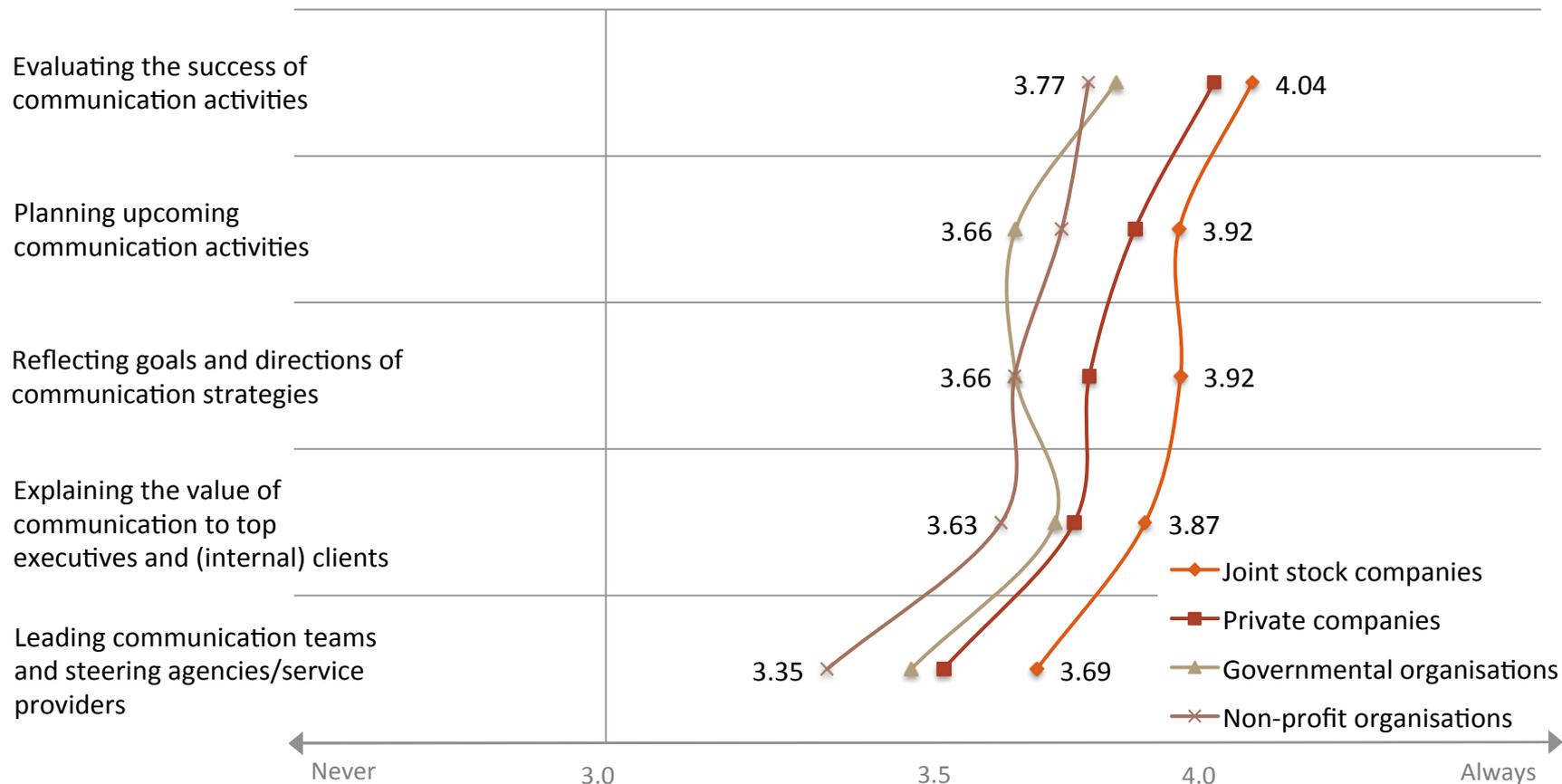


www.communicationmonitor.asia / Macnamara et al. 2015 / n = 803 PR professionals in communication departments in 12 countries. Q7: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Do not use at all) – 5 (Use continuously). Percentages: Frequency based on scale points 4-5.

## Measurement insights: only two thirds of the communication departments use evaluation data for managing future activities



## No significant differences for the use of measurement insights in various types of organisations





**Job satisfaction**

## Chapter overview

Satisfied employees are generally considered as an important driver for individual and organisational performance (Judge et al., 2001). In Asia-Pacific, overall job satisfaction among communication professionals is fairly high with the majority of respondents (65.4 per cent) reporting that they are satisfied with their jobs. Another 22.8 per cent are neutral and 11.7 per cent are dissatisfied with their current situation. This pattern is quite comparable across the countries. However the Philippines and Japan report slightly higher levels of satisfaction in comparative terms, with about three out of four saying they are satisfied with their jobs.

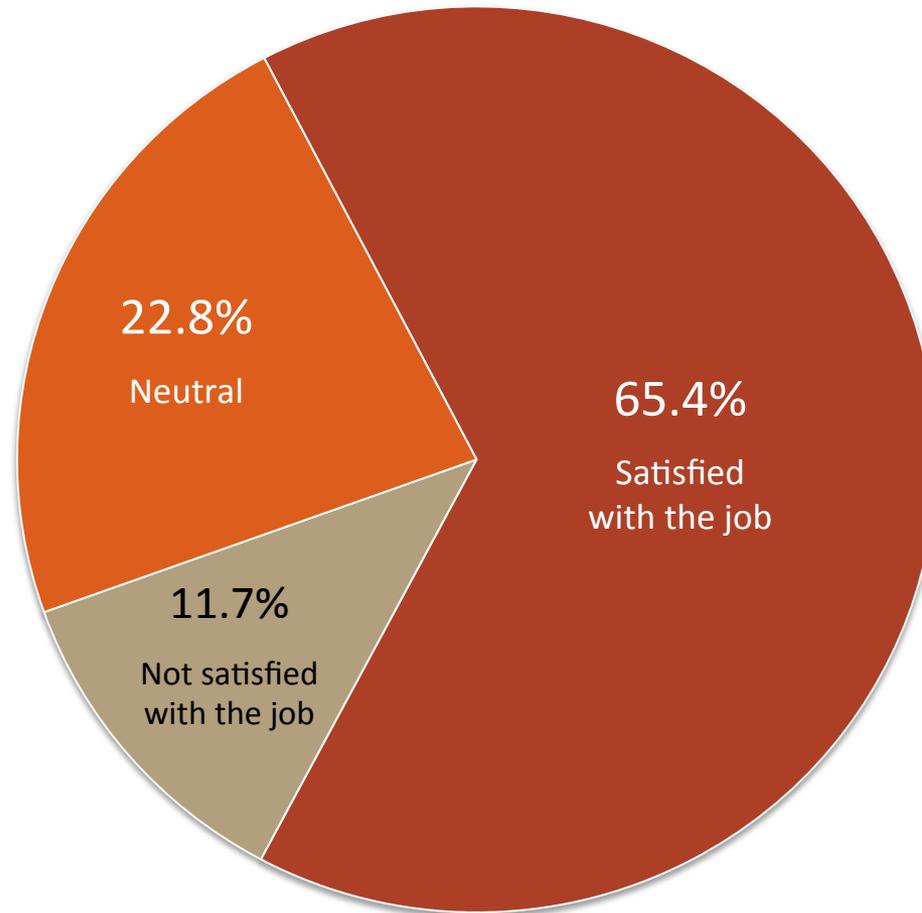
Looking into details, it is obvious that the majority of communicators do not view their own salary as being adequate. But this is balanced by the enjoyment of interesting tasks and recognition from superiors or clients. Task interestingness is rated especially high in Australia and the Philippines, while the perception of inadequate salaries and lack of job security is notably prevalent in South Korea.

A correlation analysis indicates that overall job satisfaction is driven more by interesting tasks, greater career opportunities, job status and recognition by superiors and clients than by salary levels, job security or work-life balance. Interestingly, the ranking of those drivers reflects exactly the situation in Europe (Zerfass et al., 2014, p. 38), though the exact strength of influence for each factor differs between the continents.

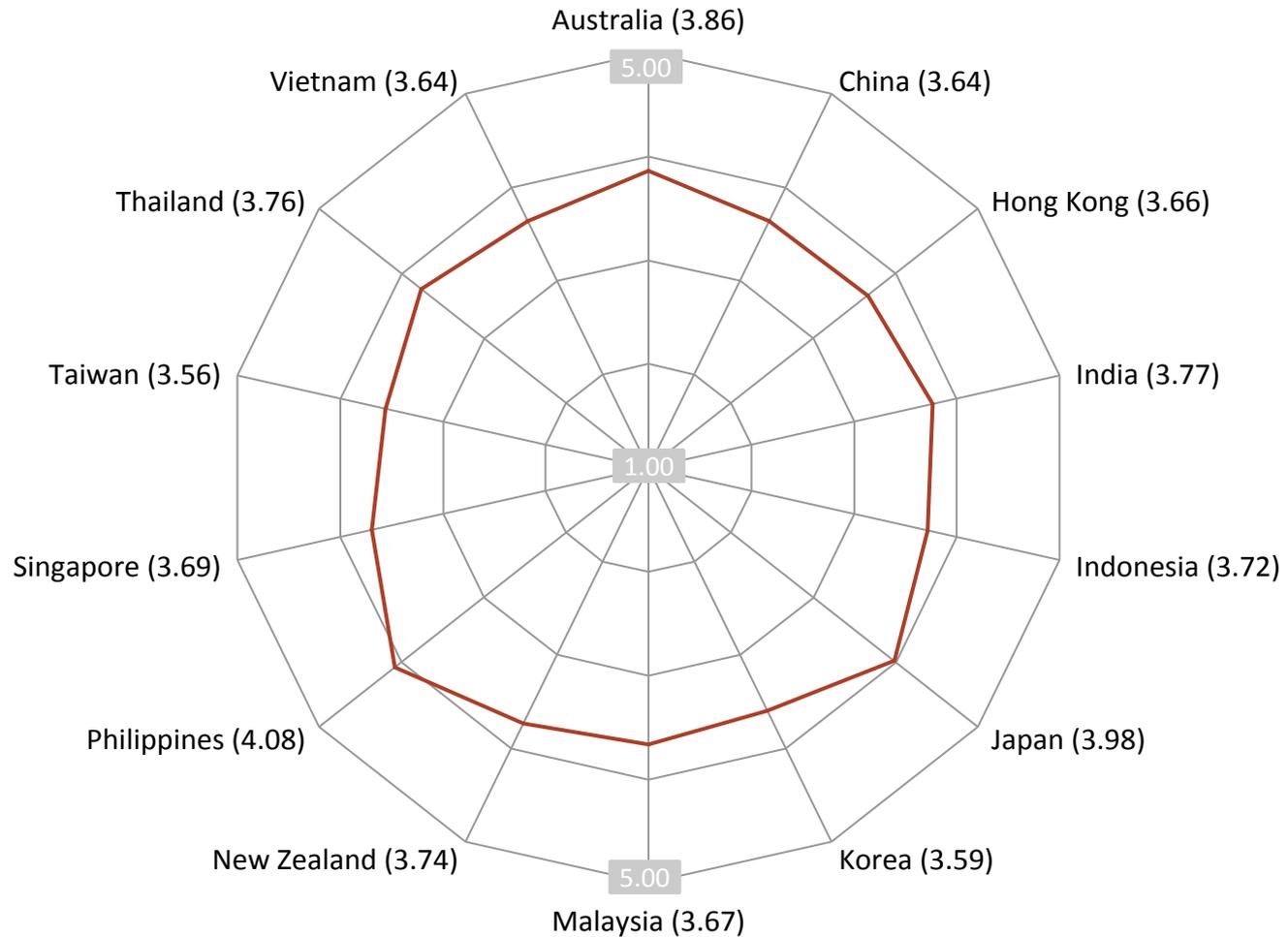
Amongst different types of organisations, respondents from non-profit organisations report most often about interesting and manifold tasks. Those professionals are also ahead regarding the appreciation by clients and superiors and their own work-life balance. Respondents from governmental organisations report most often about high job security and adequate salary. Professionals working in listed and private companies rate these same factors lowest amongst all types of organisations.

There are stark differences among rank and file in terms of facets of job satisfaction, with Heads of Communications and agency CEOs reporting higher levels of job satisfaction than unit leaders, who in turn are more positive than team members. For instance, with regards to the interestingness of tasks, the top level agreed strongly with a mean score of 4.24 on a scale ranging from 1 to 5, while unit leaders reported a lower 3.74 mean score and team members/consultants responded with a 3.68 score. Similar trends were observed amongst age groups with oldest respondents (above 60 years) providing high satisfaction ratings in all dimensions investigated and the youngest group (below 29) reporting lowest levels. Those below 29 years old are however optimistic about potential job opportunities with scores roughly matching their middle-aged counterparts. Middle-aged respondents between the age bands of 30 and 59 years generally fell in between the youngest and eldest cohorts in terms of job satisfaction levels.

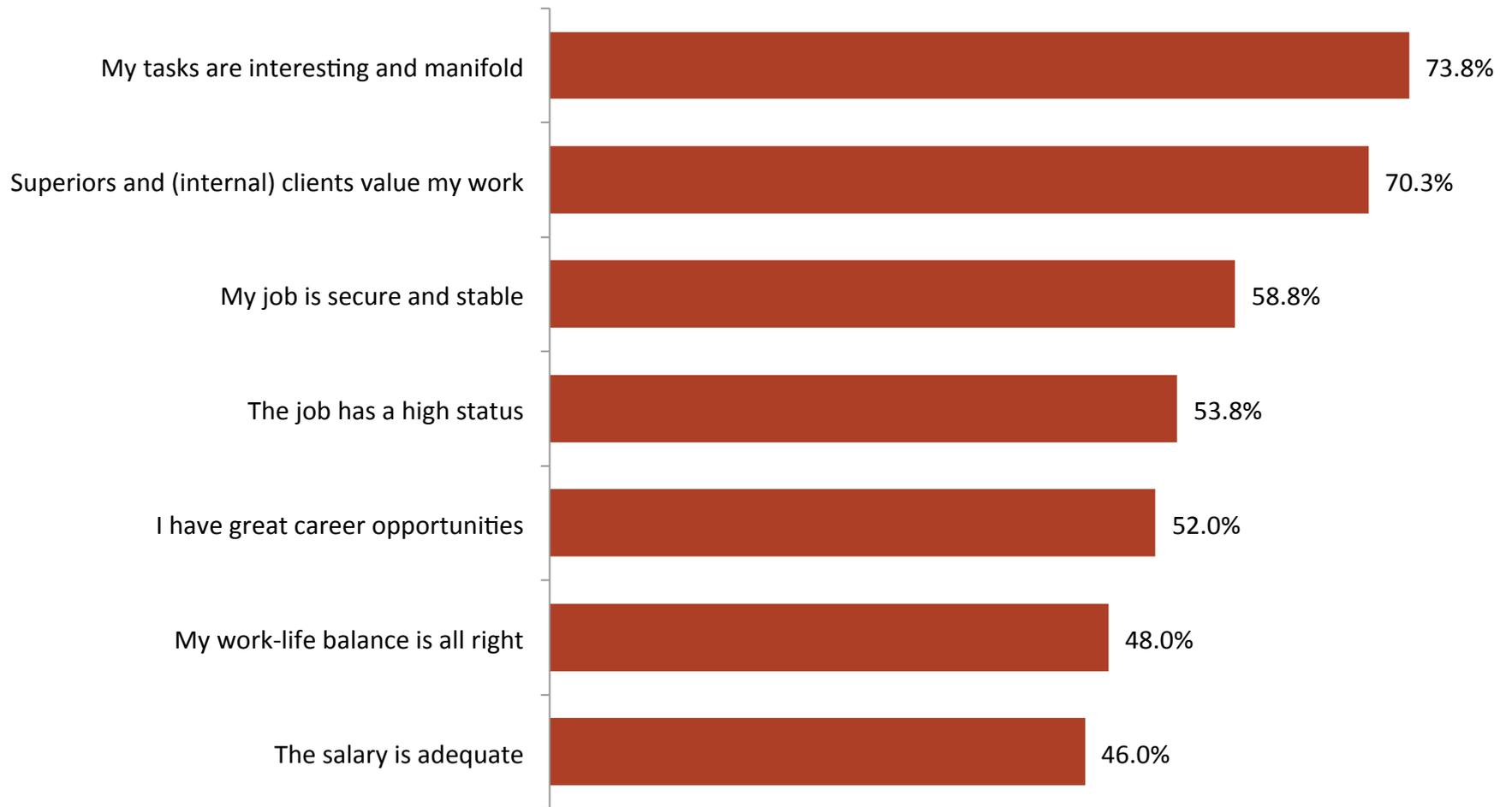
## Most communication practitioners in Asia-Pacific are satisfied with their job



## Overall job satisfaction among communication professionals in key countries



Less than a half of the communication practitioners find their salary adequate – but most respondents enjoy interesting tasks and social recognition



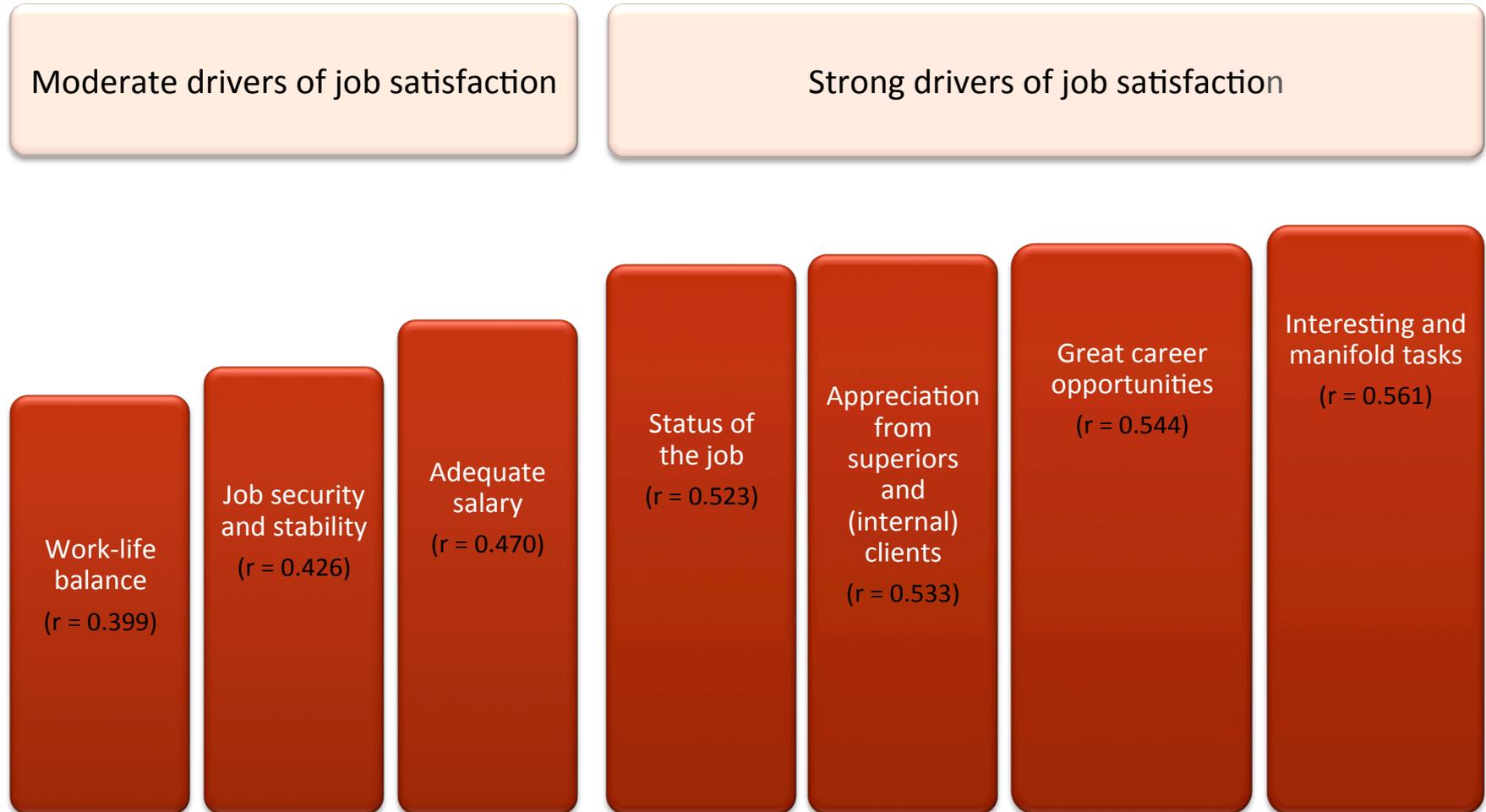
## Job situation of communication professionals in key countries

	Australia	China	Hong Kong	India	Indonesia	Japan	Korea
My tasks are interesting and manifold	4.12	3.78	3.84	3.98	4.04	3.84	3.66
Superiors and (internal) clients value my work	3.90	3.66	3.73	3.94	3.83	3.84	3.34
I have great career opportunities	3.30	3.45	3.21	3.59	3.74	3.45	3.56
My job is secure and stable	3.63	3.69	3.72	3.72	3.46	3.49	2.81
The job has a high status	3.53	3.40	3.41	3.74	3.72	3.47	3.16
The salary is adequate	3.59	3.15	3.34	3.01	3.50	3.24	2.81
My work-life balance is all right	3.23	3.26	3.24	3.37	3.63	3.18	3.00

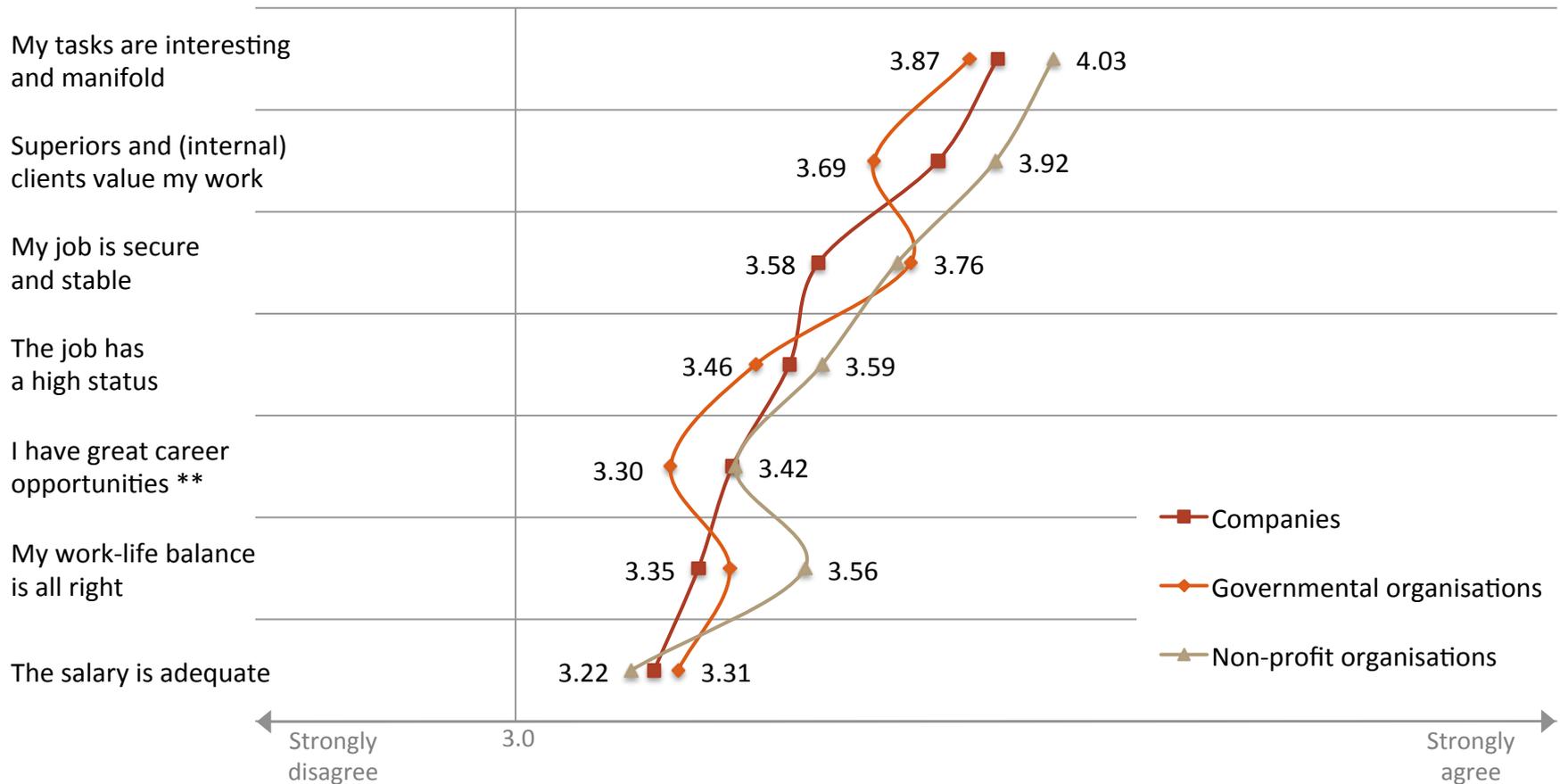
## Job situation of communication professionals in key countries (continued)

	Malaysia	New Zealand	Philippines	Singapore	Taiwan	Thailand	Vietnam
My tasks are interesting and manifold	3.88	3.92	4.36	3.95	3.96	3.91	3.91
Superiors and (internal) clients value my work	3.78	3.96	3.97	3.87	3.87	3.98	3.73
I have great career opportunities	3.38	3.40	3.82	3.33	3.44	3.79	3.73
My job is secure and stable	3.60	3.77	4.10	3.60	3.47	3.73	3.39
The job has a high status	3.40	3.43	4.05	3.46	3.56	3.62	3.54
The salary is adequate	3.28	3.51	3.64	3.33	3.24	3.21	3.28
My work-life balance is all right	3.28	3.57	3.97	3.29	3.25	3.50	3.35

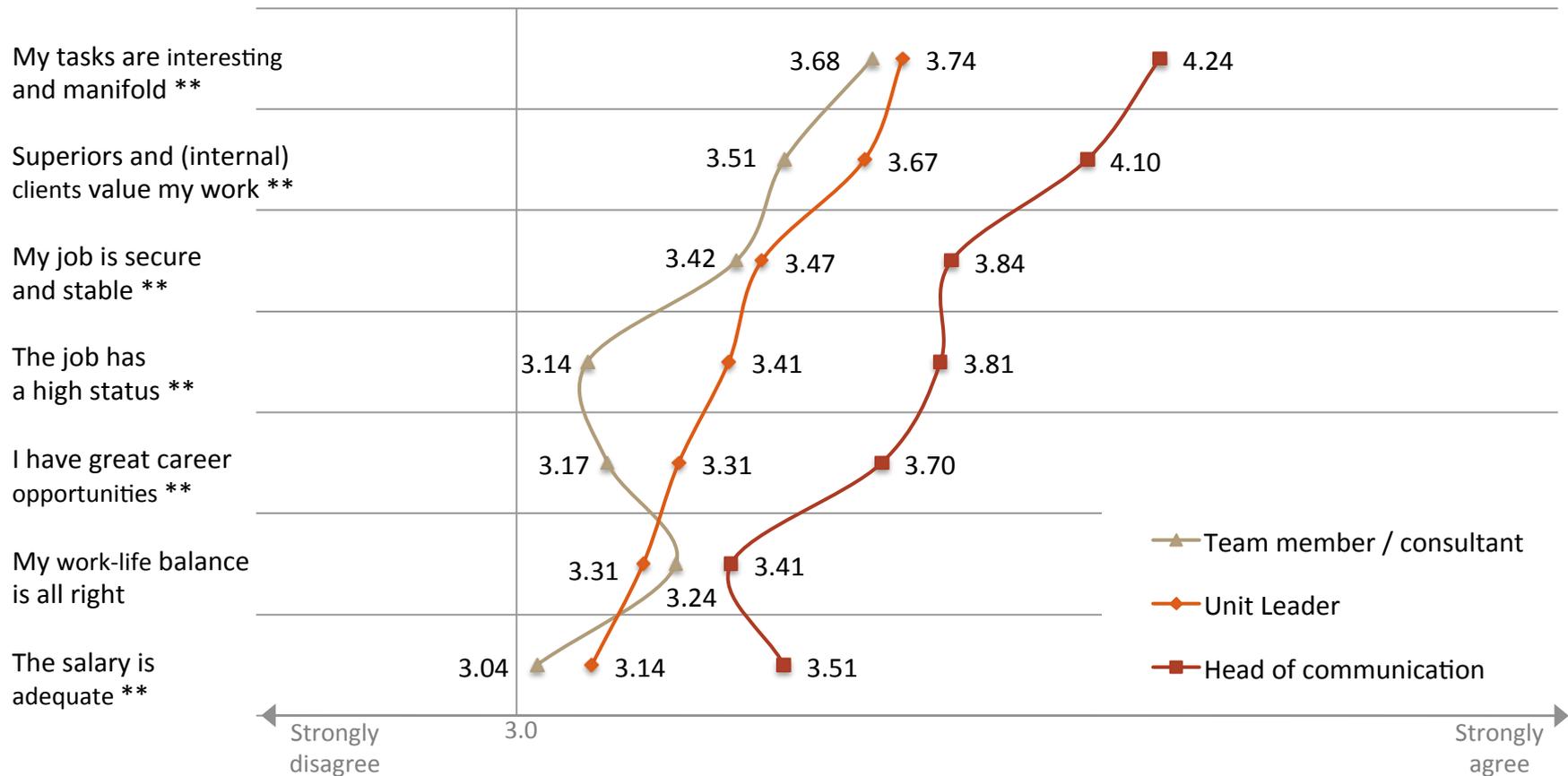
## Drivers of job satisfaction for communication professionals in Asia-Pacific



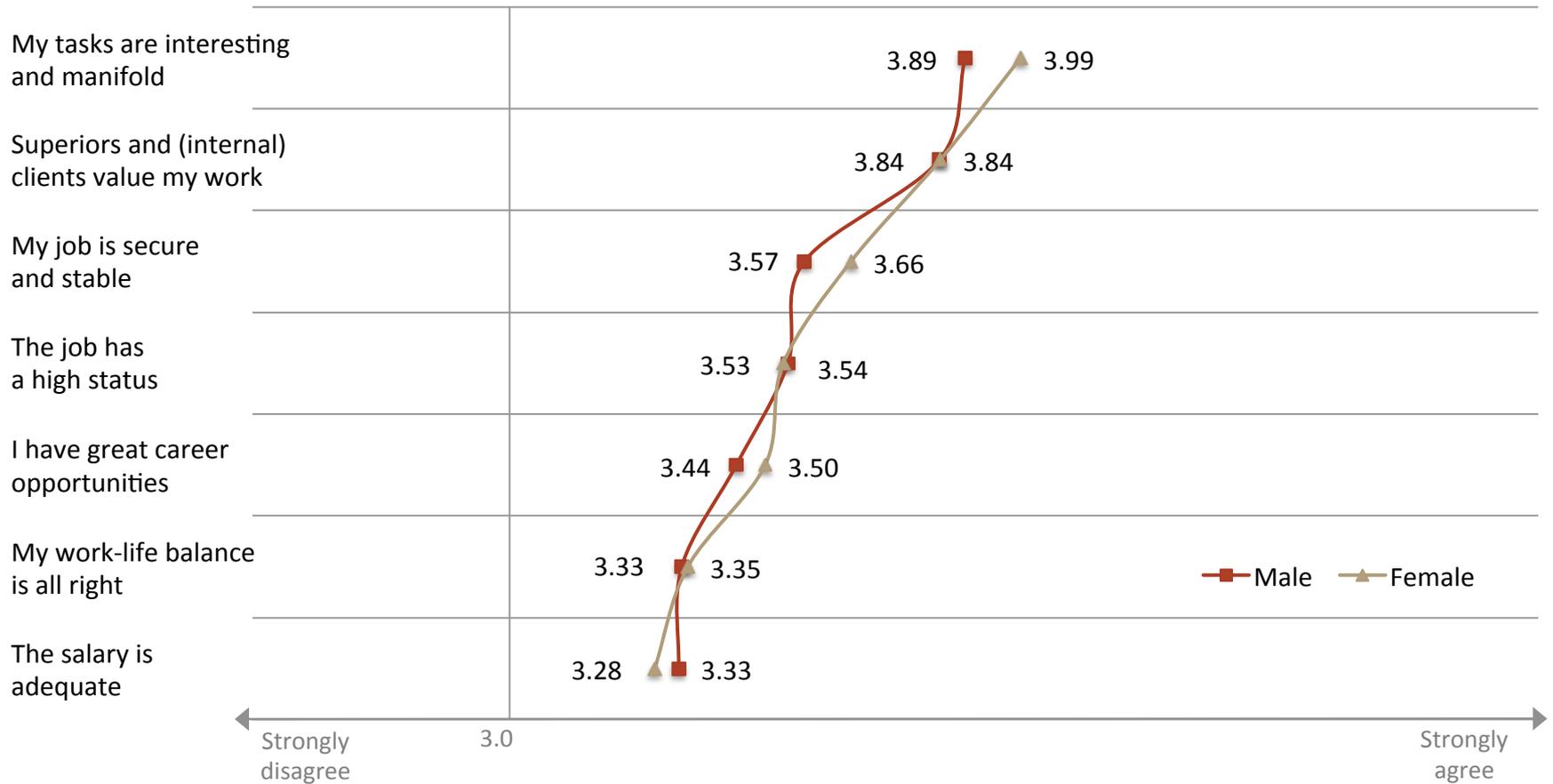
## Job satisfaction drivers in various types of organisations



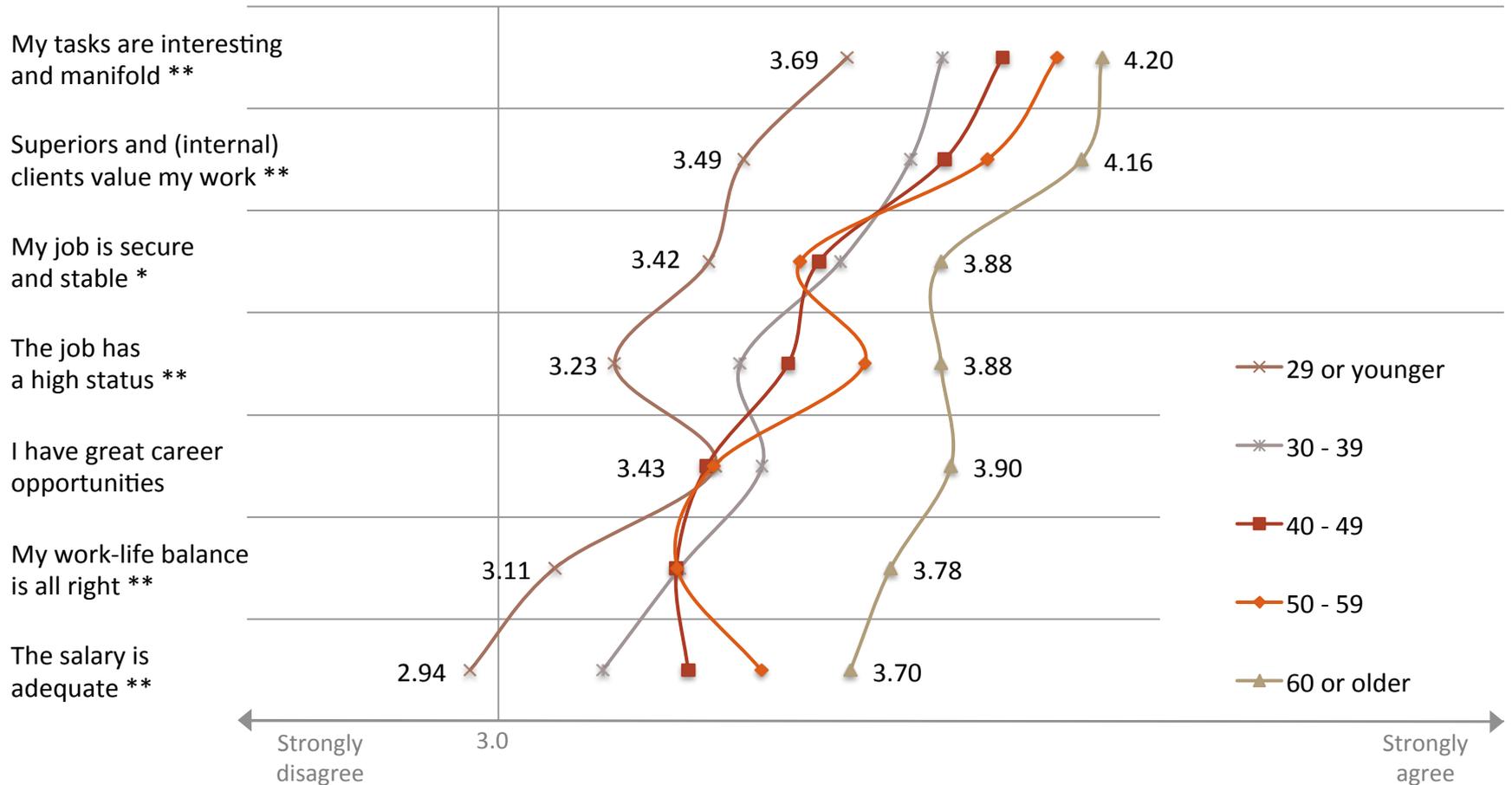
## Drivers of job satisfaction are correlated with the hierarchical position



## Consistent patterns of job satisfaction across both genders



## Elder communication professionals report a higher job satisfaction



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 1,183 PR professionals. Q 10: How do you feel about your actual job situation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ). \* Significant differences (Kendall rank correlation,  $p \leq 0.05$ ).



**Characteristics  
of excellent  
communication  
functions**

## Chapter overview

The survey used a method introduced in previous editions of the European Communication Monitor (Zerfass et al., 2014, 2015) to identify the most excellent communication departments within the sample. The approach combines self-assessments of communication professionals with statistical analyses. It differs from normative concepts of excellence (Grunig, 1992; Grunig et al., 2002) but leads to comparable overall results (Verčič & Zerfass, 2015).

Excellence is based on the internal standing of the communication department within the organisation (influence) and external results of the communication department's activities in addition to its basic qualifications (performance). Each of these two components were calculated on the basis of four dimensions, the first on advisory influence (where senior managers take the recommendations of the communication function seriously) and executive influence (where communication will likely be invited to senior-level meetings dealing with organisational strategic planning), and the second on overall communication success (where the communication of the organisation is successful) and department competence (where the quality of the communication function is better compared to those of competing organisations). Only organisations clearly outperforming in all four dimensions are considered as excellent in the benchmark exercise.

Based on this measure, 24.4 per cent of the sampled departments across Asia-Pacific were qualified as excellent. When comparing the spread of overall excellence across different types of organisation types, non-profits lead the field (28.0 per cent) with joint stock companies slightly behind (27.0 per cent). Private companies and governmental departments lag behind at 22.9 per cent and 16.1 per cent respectively. Interestingly, in breaking down the excellence components, in terms of influence the communication departments in joint stock companies (43.7 per cent) and private companies (42.9 per cent) fare better than non-profits (40.9 per cent) and governmental organisations (36.4 per cent). Similar trends emerged in the other sub-fields. This means that many corporate communication departments are good in some of the aspects investigated, but not in all dimensions at the same time – non-profits are more balanced overall.

Excellent communication departments are more likely to be led by a chief communication officer who is a member of the executive board or reports directly to the CEO or highest decision maker. Excellent communication departments use a broad variety of rationales (such as reputational effects, thought leadership and crisis preparedness) to explain the value of communication. Excellent communication departments do a better job in all facets of monitoring and measurement the effectiveness of communication management. They are better in assessing business impact and stakeholder reactions. These departments also use measurement insights more frequently for managing their activities. They collaborate with mass media and their products more frequently and intensively, and they employ professionals with stronger levels of social media skills, especially in the areas of strategy development and dialogical approaches for the social web. Last but not least, professionals working in excellent communication departments are significantly more satisfied with their jobs.

## Identifying excellent communication departments

*Statistical analyses are used to identify excellent organisations, based on benchmarking approaches and self-assessments known from quality management*

### EXCELLENCE

Communication departments in organisations which outperform others in the field

#### INFLUENCE

Internal standing of the communication department within the organisation

#### PERFORMANCE

External results of the communication department's activities and its basic qualifications

##### ADVISORY INFLUENCE

(Q15)

Senior managers take recommendations of the communication function (very) seriously

##### EXECUTIVE INFLUENCE

(Q16)

Communication will (very) likely be invited to senior-level meetings dealing with organisational strategic planning

##### SUCCESS

(Q17)

The communication of the organisation in general is (very) successful

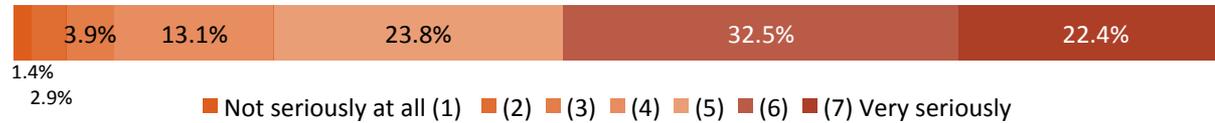
##### COMPETENCE

(Q18)

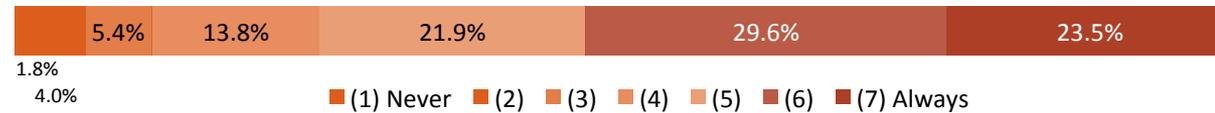
The quality and ability of the communication function is (much) better compared to those of competing organisations

## Excellent communication departments

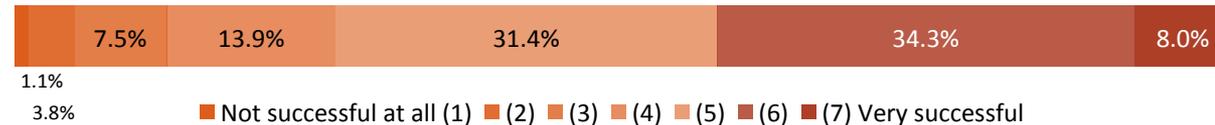
### Advisory influence



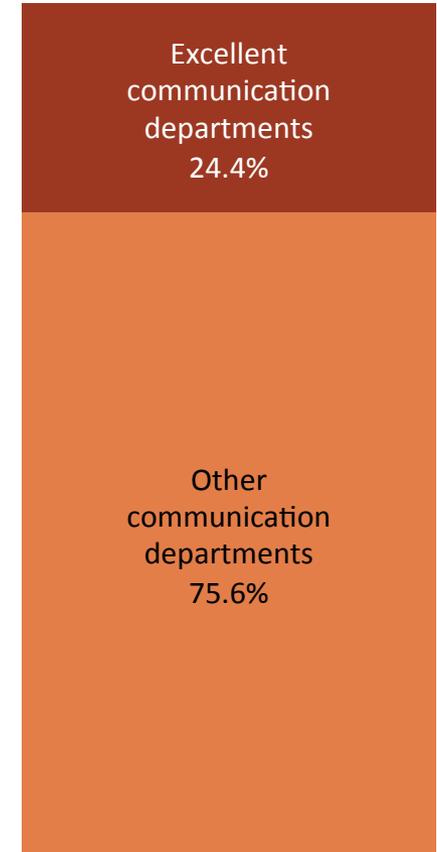
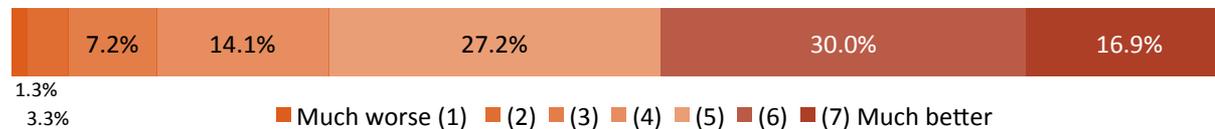
### Executive influence



### Success

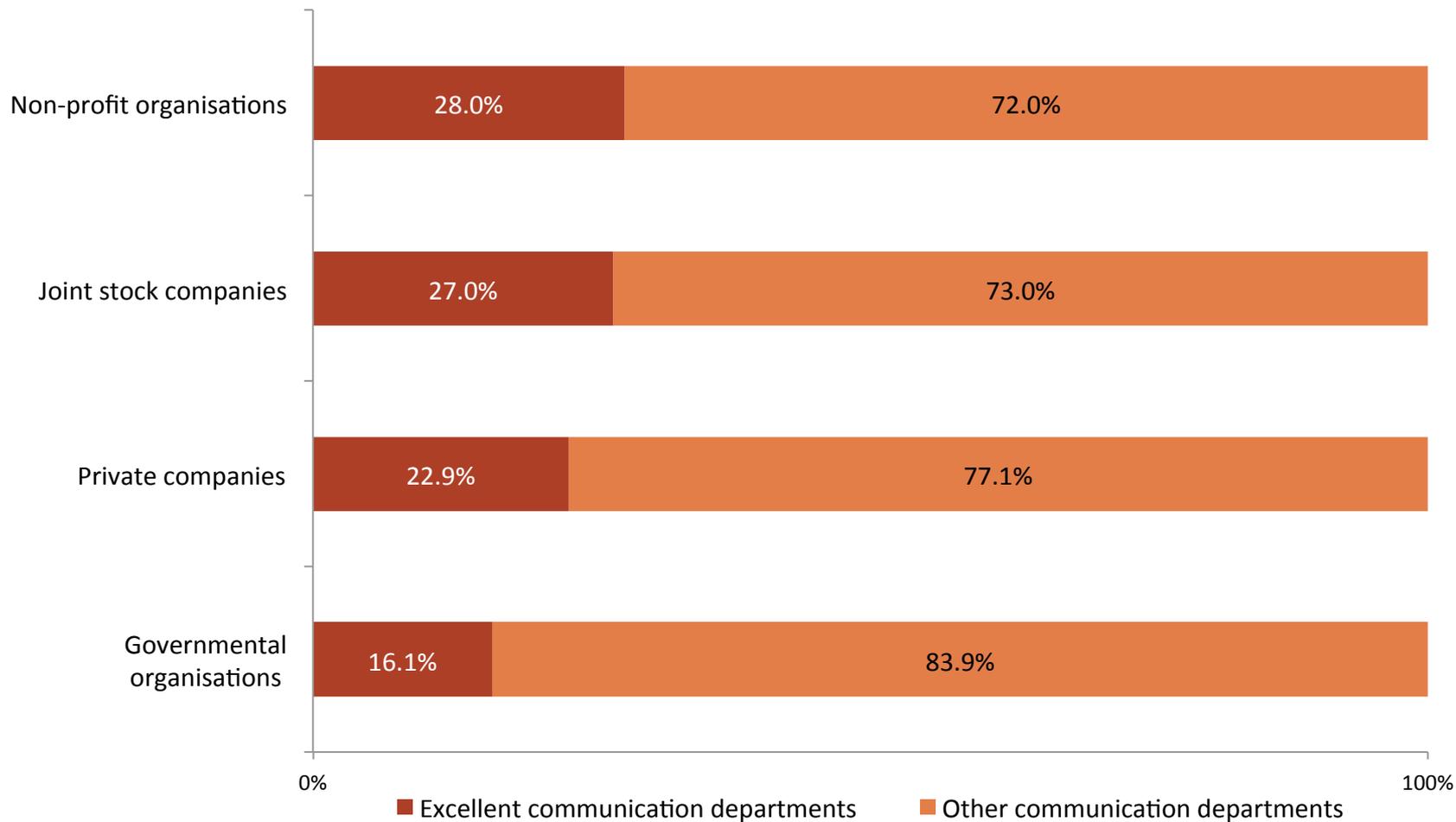


### Competence

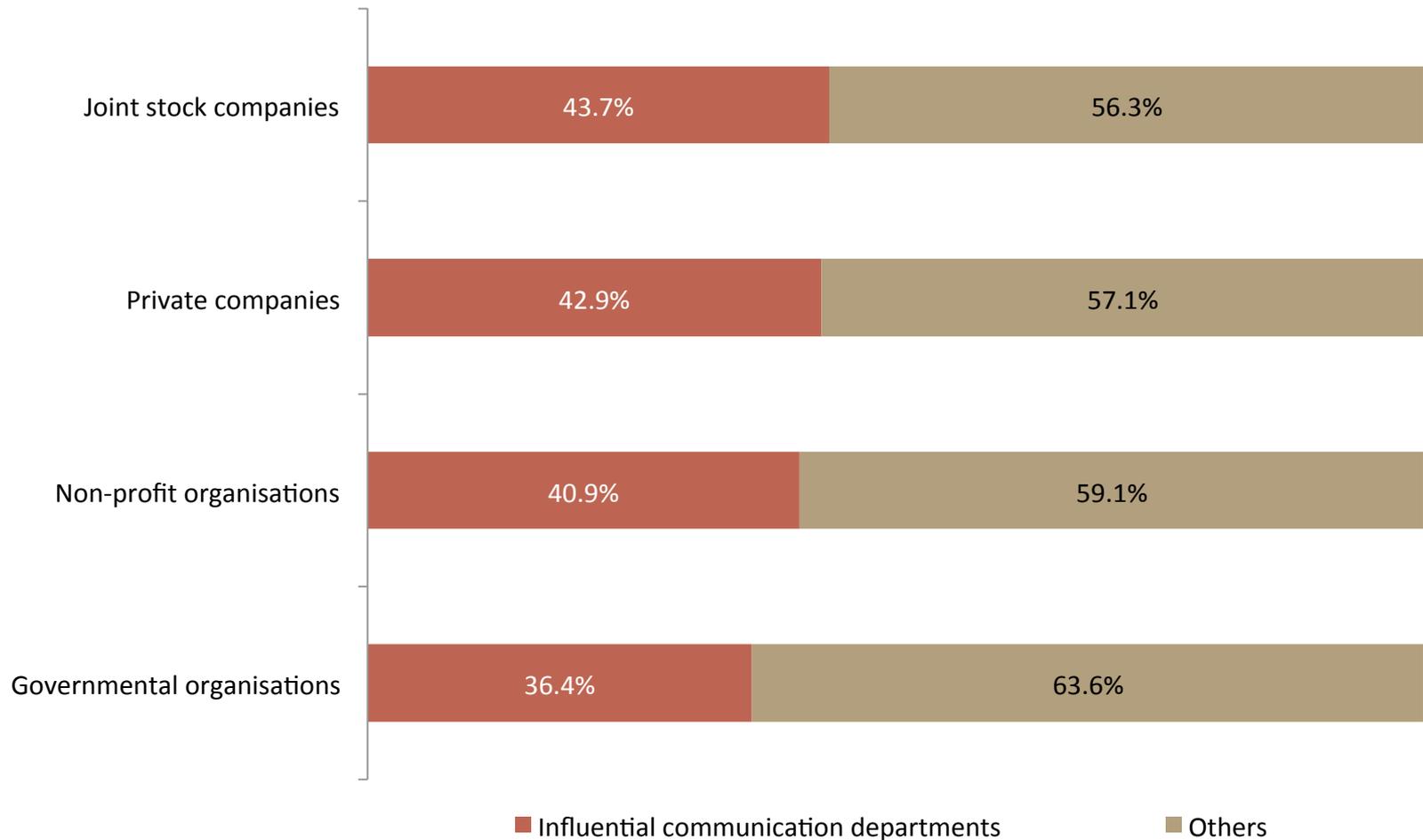


www.communicationmonitor.asia / Macnamara et al. 2015 / n = 901 PR professionals in communication departments. Advisory influence, Q 15: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 16: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Success, Q 17: In your opinion, how successful is the communication of your organisation in general? Competence, Q 18: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1–7. Percentages: Excellent communication functions based on scale points 6-7 for each question.

## Excellent communication departments in different types of organisations: Non-profit organisations are leading the field

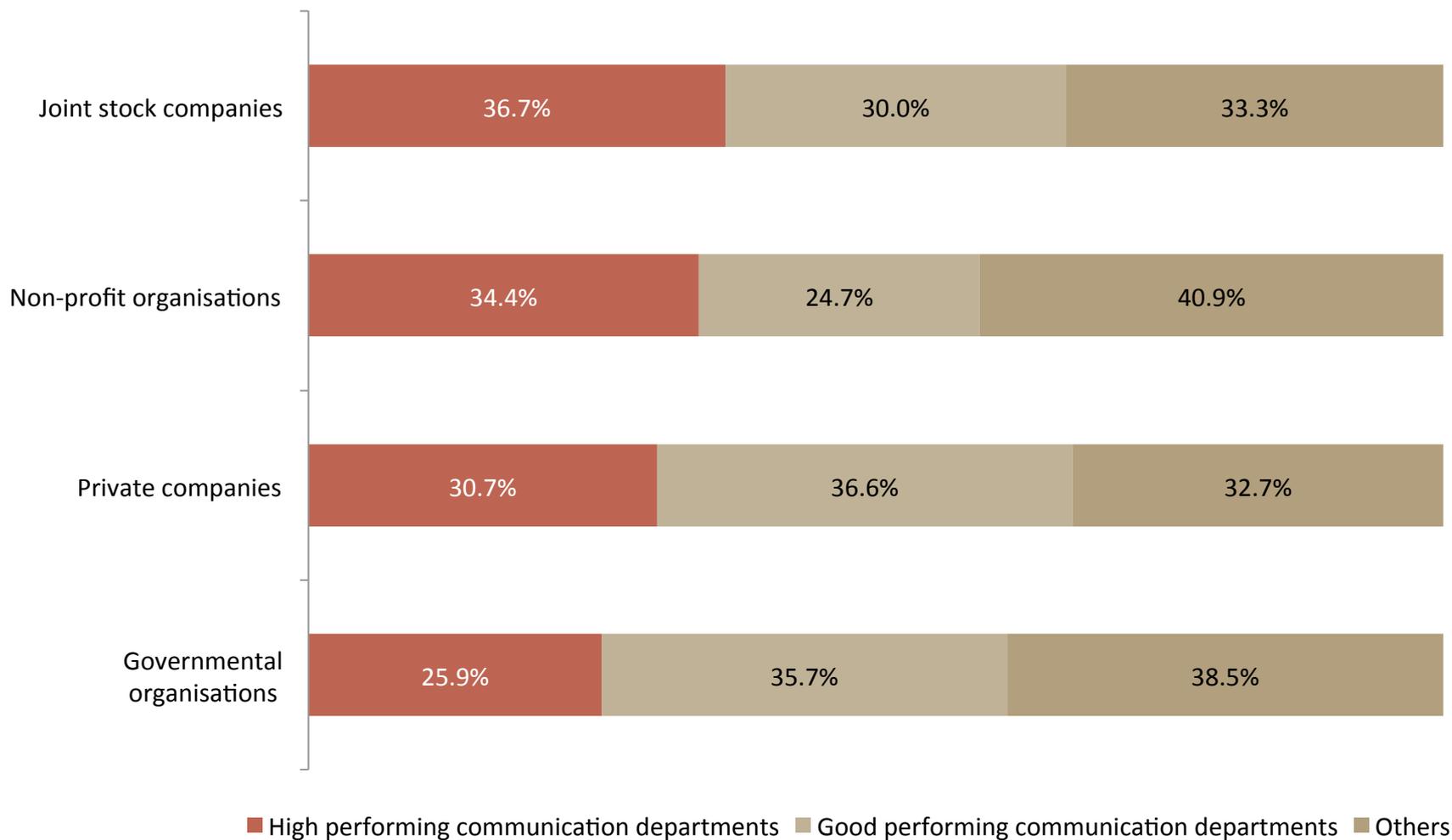


## Influence of communication departments

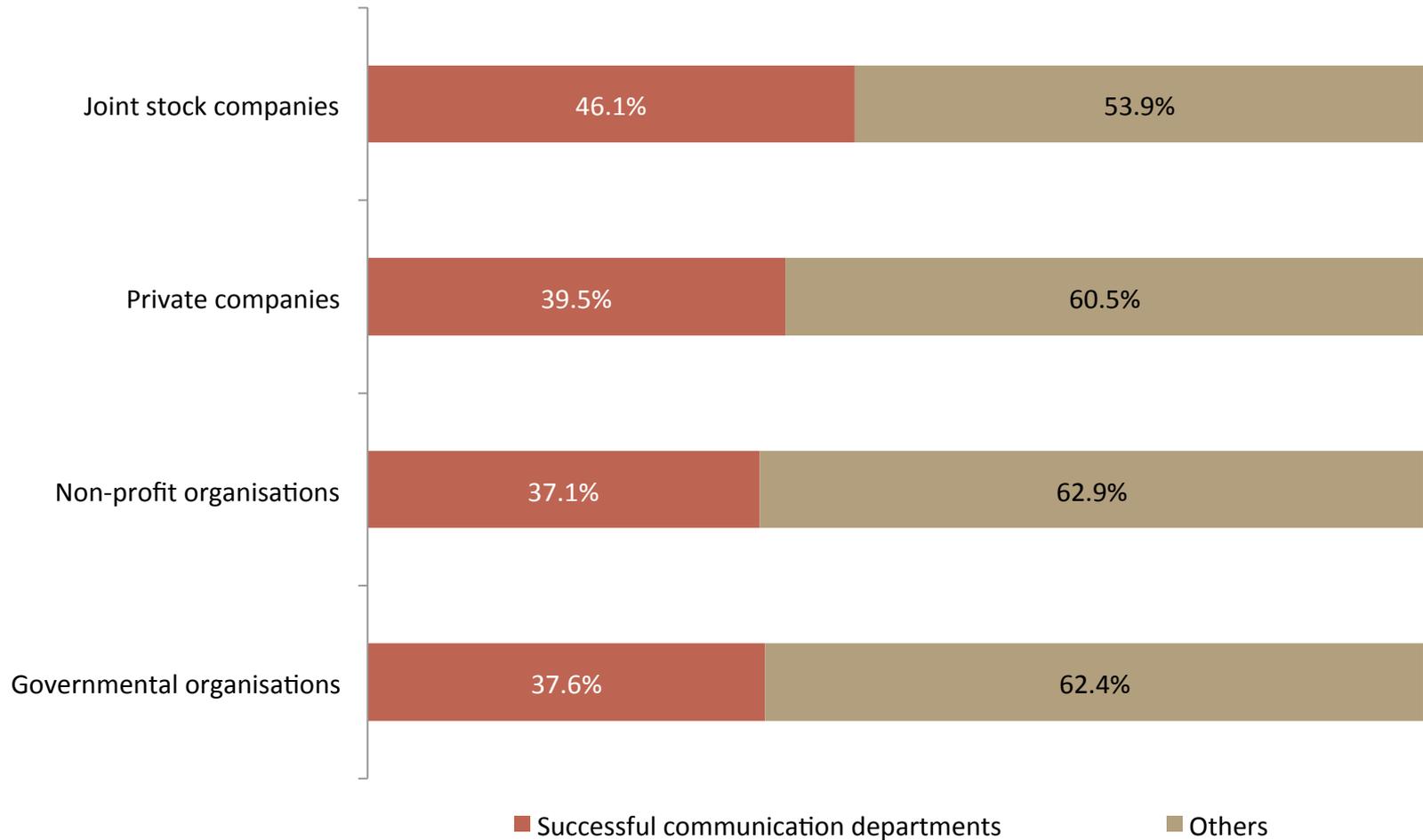


www.communicationmonitor.asia / Macnamara et al. 2015/ n = 901 PR professionals in communication departments. Advisory influence, Q 15: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q 16: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Percentages: Influential communication functions, based on scale points 6-7 for Q 15 and Q 16.

## Performance of communication departments

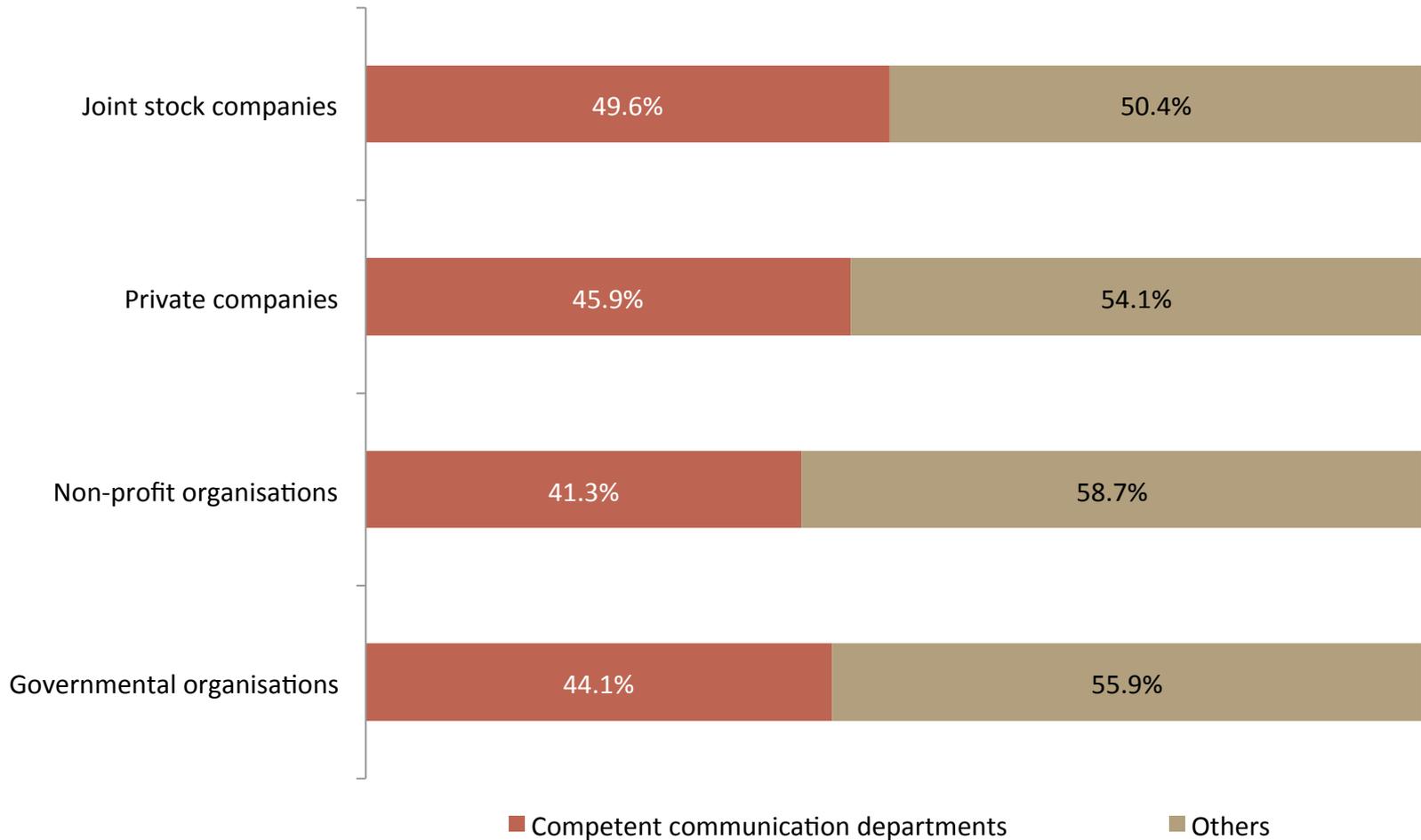


## Successful communication departments



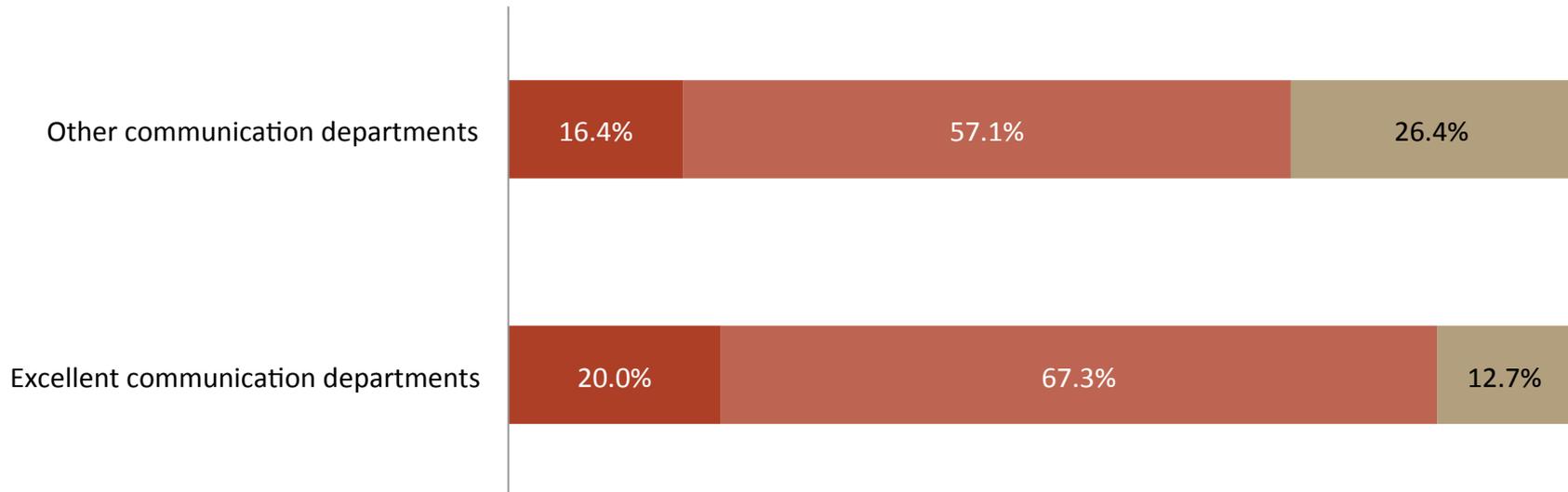
www.communicationmonitor.asia / Macnamara et al. 2015/ n = 901 PR professionals in communication departments. Q 17: In your opinion, how successful is the communication of your organisation in general? Scale 1 (not successful at all) – 7 (very successful). Percentages: Successful communicating departments based on scale points 6-7.

## Competence in communication departments



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 901 PR professionals in communication departments. Q 18: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 (much worse) – 7 (much better). Percentages: Competent communicating departments based on scale points 6-7.

## Excellent communication departments are much closer linked to top management



*The top communication manager / chief communication officer ...*

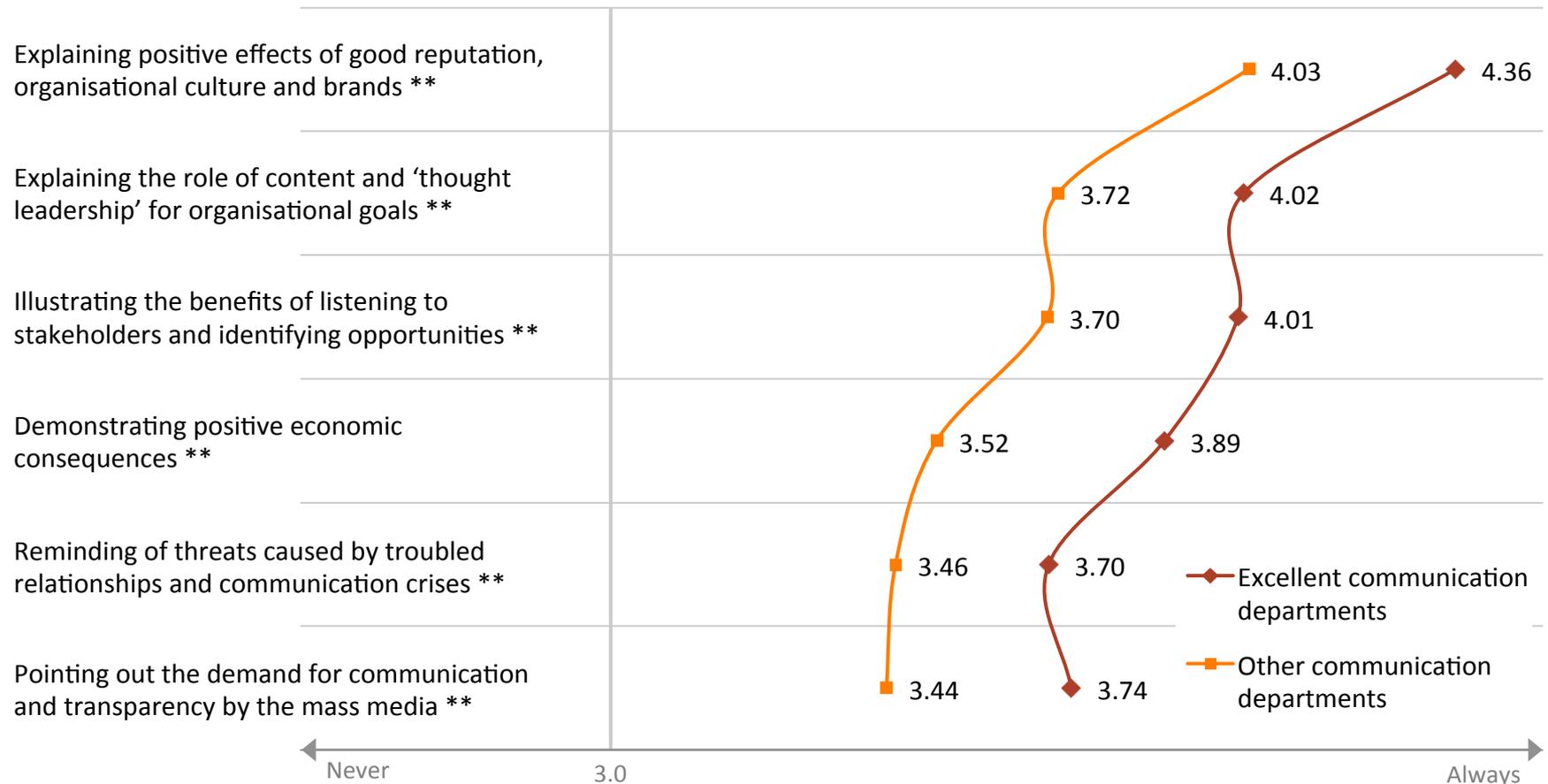
- is a member of the executive board (strongly aligned function)
- reports directly to the CEO or highest decision-maker on the executive board (aligned communication function)
- does not report directly to the CEO or highest decision-maker (weakly aligned function)

## Excellent communication departments are less concerned about aligning and explaining their activities, but focused on CSR and digital challenges

*Most important issues for communication management until 2018*

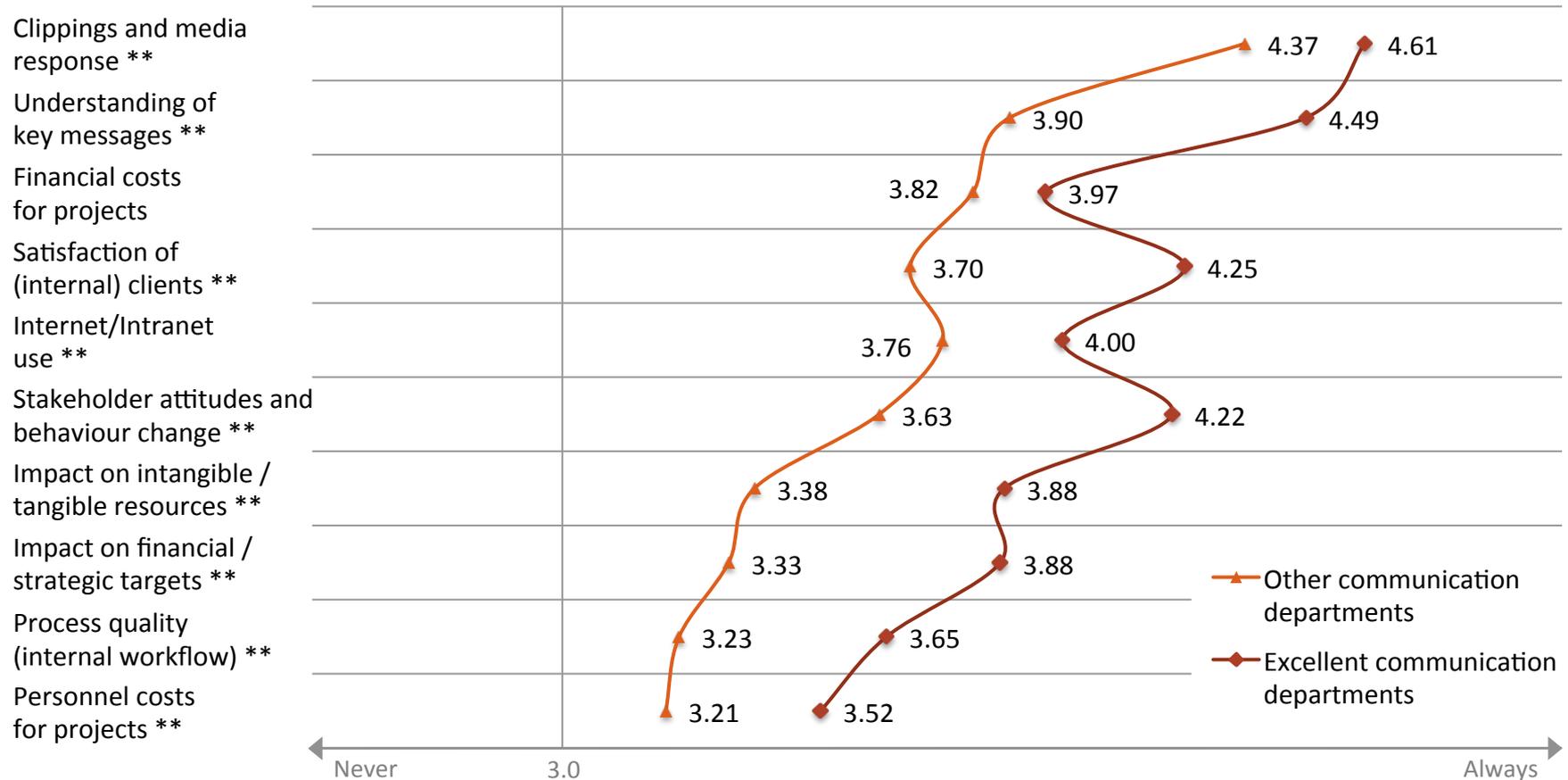


## Explaining the value of communication: excellent departments use a broad variety of rationales more often



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 901 PR professionals in communication departments. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ).

## Excellent communication departments do a better job at monitoring and measuring the effectiveness of communication management



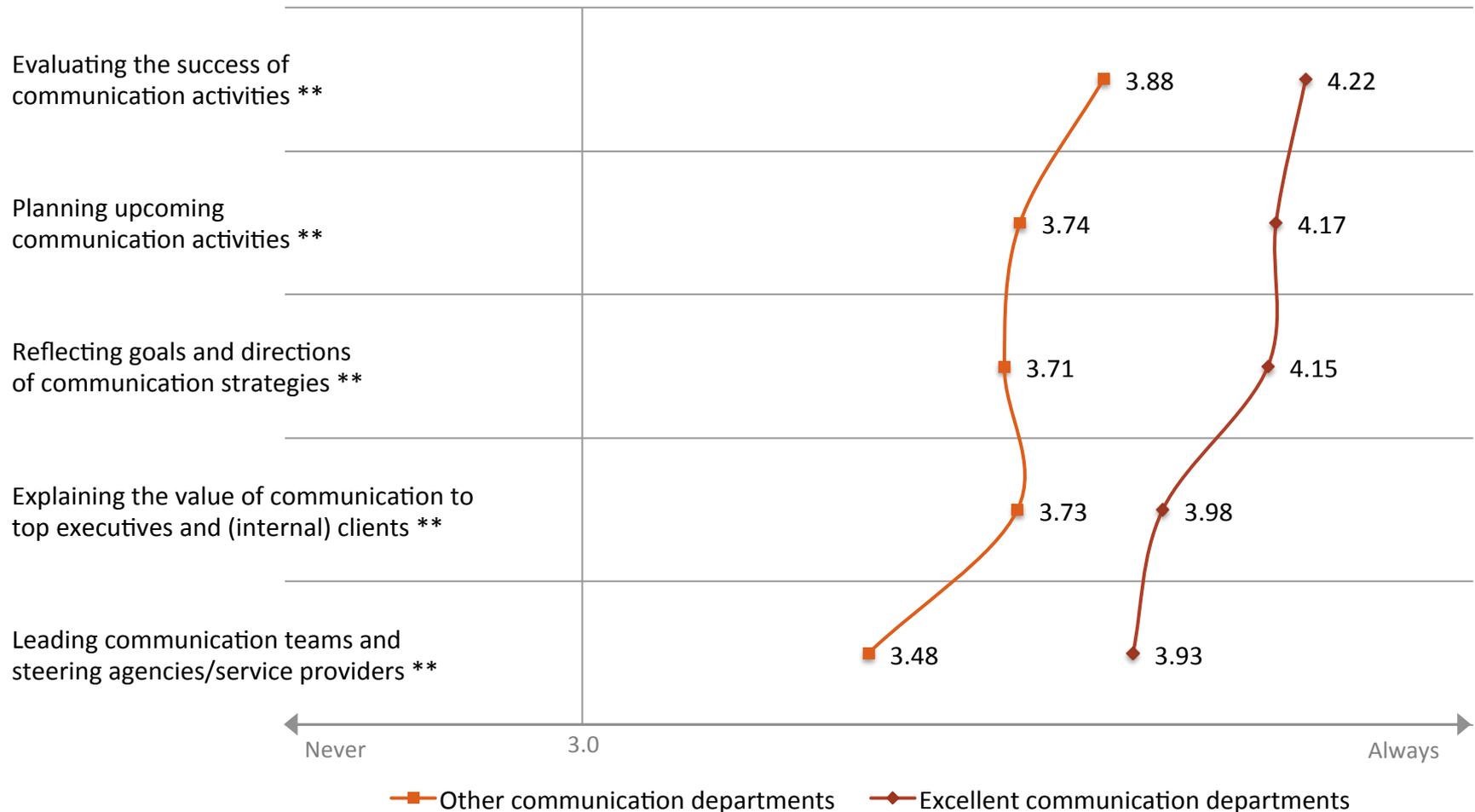
www.communicationmonitor.asia / Macnamara et al. 2015 / n = 847 PR professionals in communication departments. Q 7: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Never) – 5 (Always). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ).

## Communication measurement: excellent departments evaluate more intensively; they are better in assessing business impact and stakeholder reactions

<i>Items monitored or measured</i>	Excellent communication departments	Other communication departments	Δ
Impact on intangible/tangible resources (i.e. economic brand value) **	3.88	3.38	0.50
Impact on financial/strategic targets (i.e. with scorecards, strategy maps) **	3.88	3.33	0.54
Stakeholder attitudes and behaviour change **	4.22	3.63	0.59
Understanding of key messages **	4.49	3.90	0.59
Clippings and media response **	4.61	4.37	0.24
Internet / Intranet usage **	4.00	3.76	0.24
Satisfaction of internal clients **	4.25	3.70	0.55
Process quality (internal workflow) **	3.65	3.23	0.42
Financial costs for projects	3.97	3.82	0.14
Personnel costs for projects **	3.52	3.21	0.31

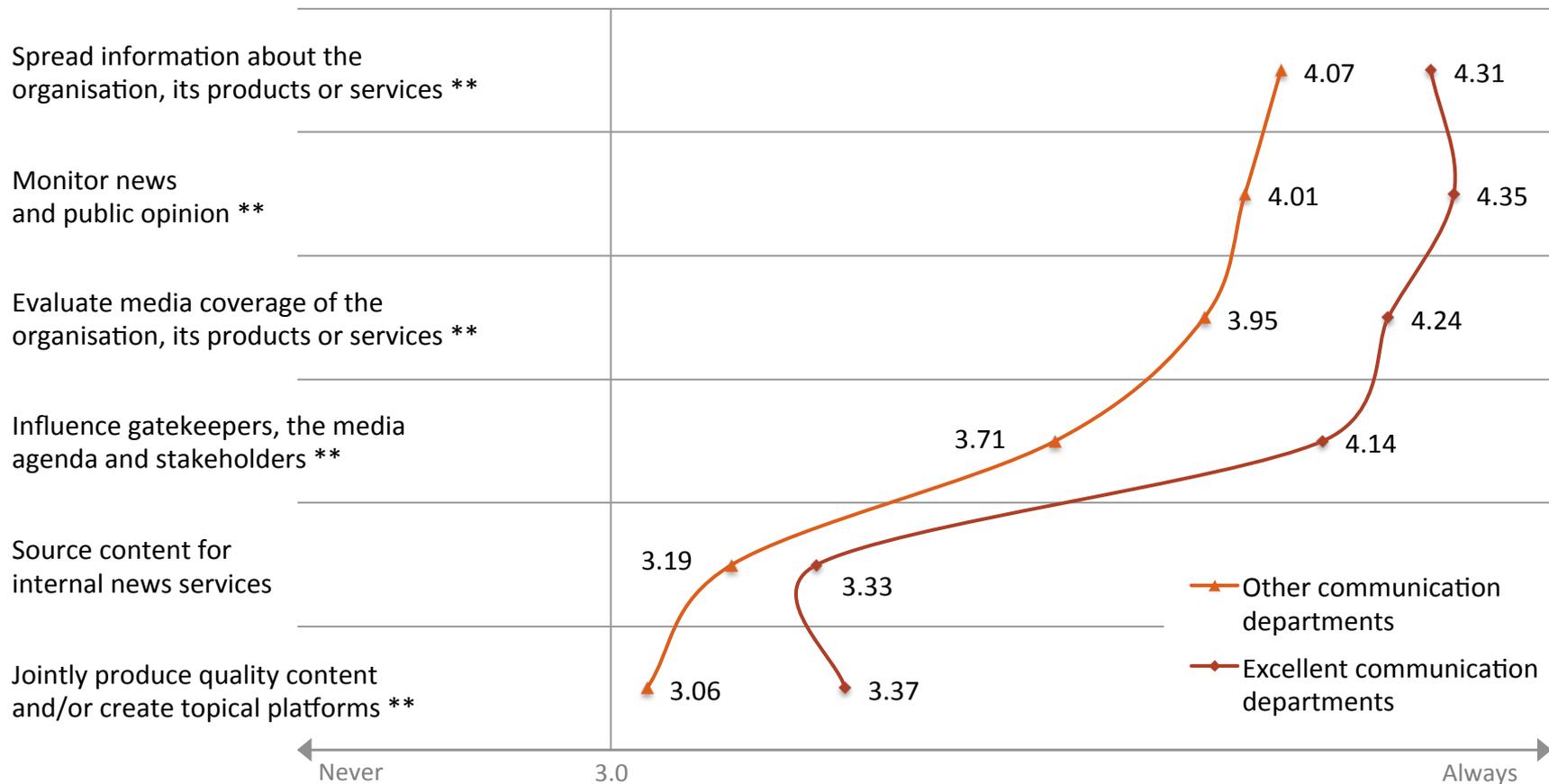
■ Input  
 ■ Output  
 ■ Outcome  
 ■ Outflow

## Excellent communication departments use measurement insights more frequently for managing their activities



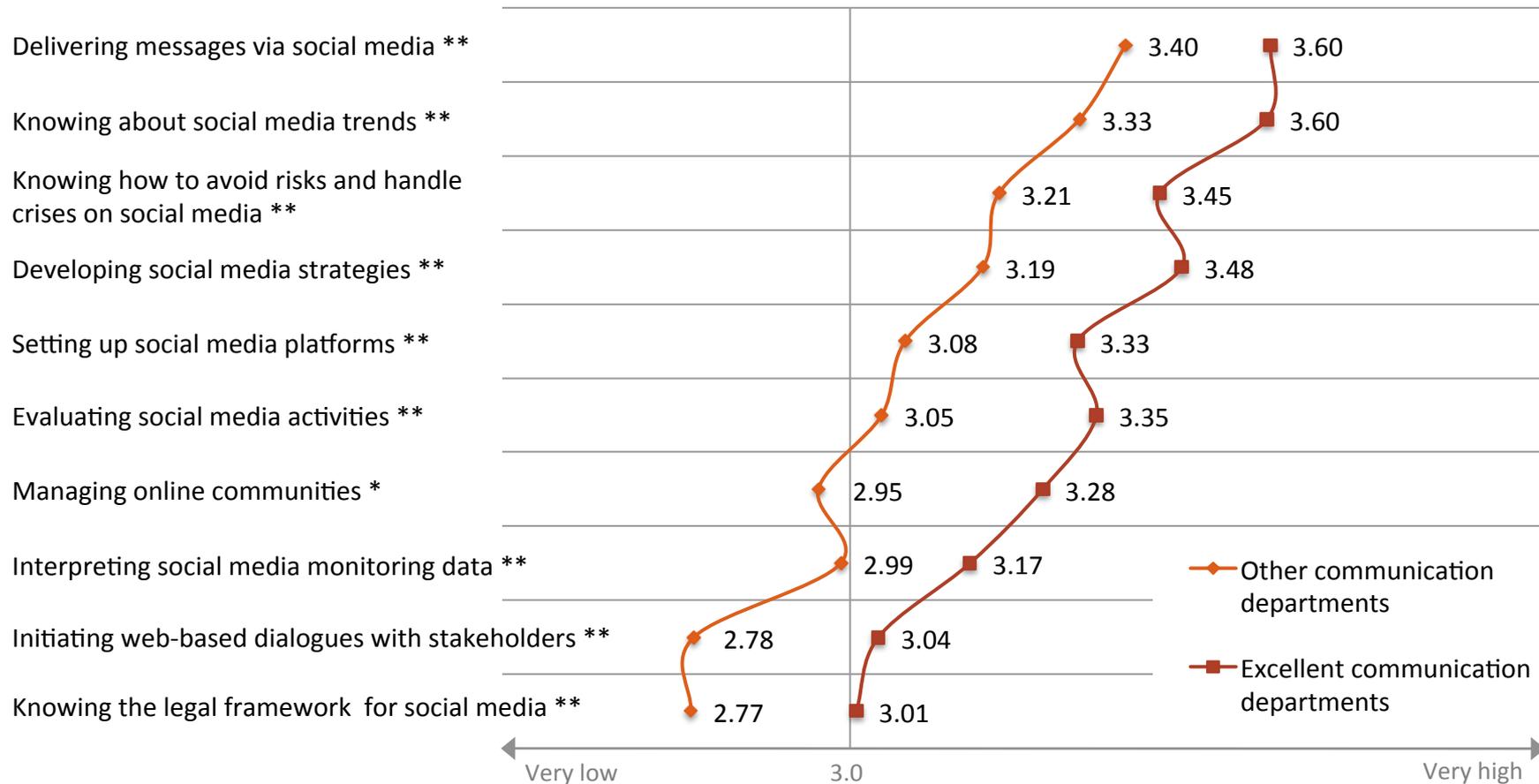
www.communicationmonitor.asia / Macnamara et al. 2015/ n = 901 PR professionals in communication departments. Q 8: How are insights from communication measurement used in your organisation? Scale 1 ( Never) – 5 (Always). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ).

## Excellent communication departments collaborate more intensively with the mass media



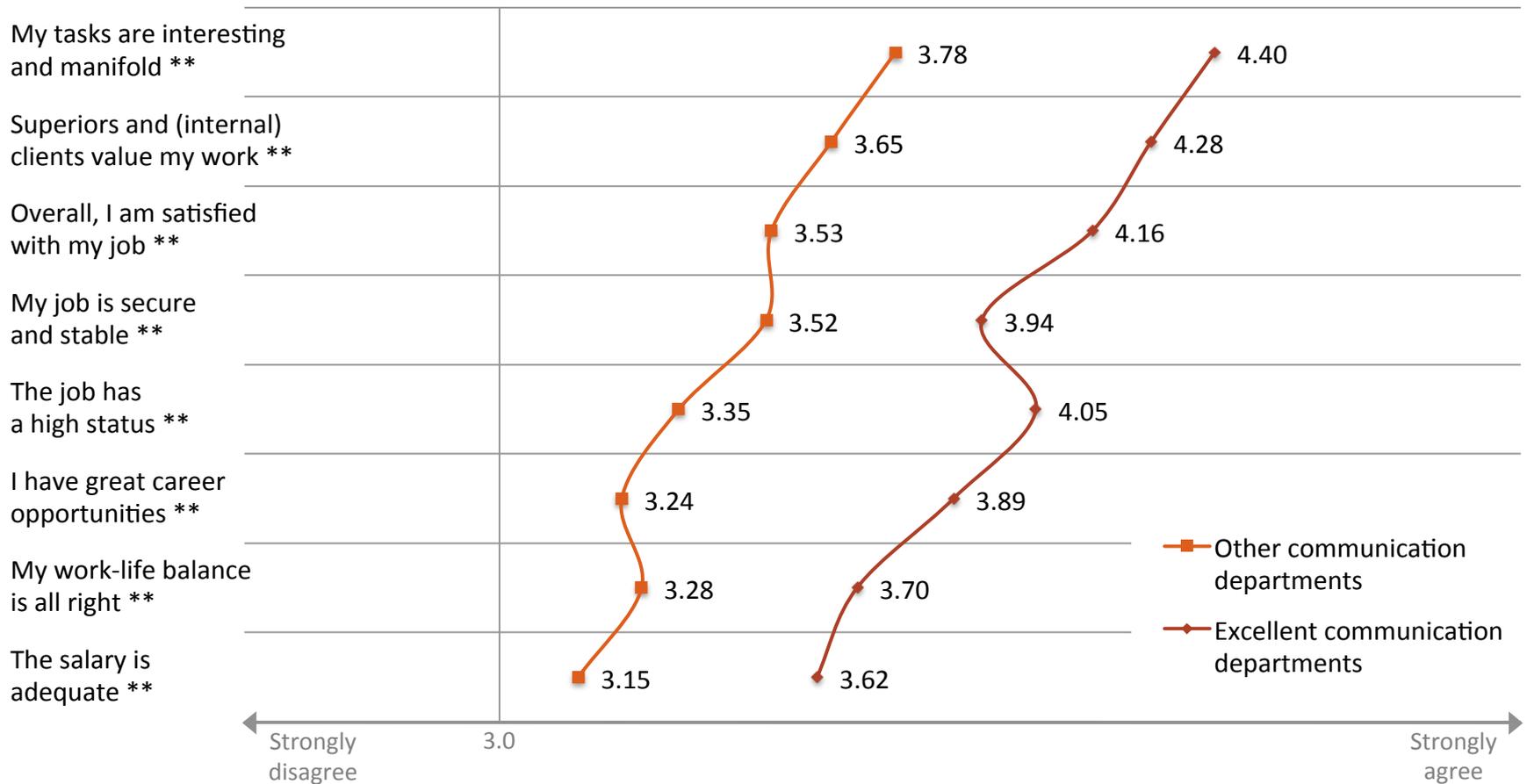
www.communicationmonitor.asia / Macnamara et al. 2015/ n = 897 PR professionals in communication departments. Q 2: Why does your organisation interact with the mass media? My organisation use mass media and their products to ... Scale 1 (Never) – 5 (Always). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ). \* Significant differences (Kendall rank correlation,  $p \leq 0.05$ ).

## Excellent communication departments employ professionals with a stronger level of social media skills



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 901 PR professionals in communication departments. Q 5: How would you rate your capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ). \*Significant differences (Kendall rank correlation,  $p \leq 0.05$ ).

# Professionals working in excellent communication departments are significantly more satisfied with their jobs



www.communicationmonitor.asia / Macnamara et al. 2015 / n = 889 PR professionals in communication departments. Q 10: How do you feel about your actual job situation? Scale 1 (Strongly disagree) – 5 (Totally agree). Mean values. \*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ).

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### APACD – Regional Coordinators

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## Survey organisers



### Asia-Pacific Association of Communication Directors (APACD)

The Asia-Pacific Association of Communication Directors (APACD) provides a peer network for mid- to senior-level communication professionals from all fields and industries across the Asia-Pacific region to discuss and formulate solutions to current communication challenges. It aims to establish common quality standards and advances professional qualifications within the field by providing publications and organising events and meetings.

[www.apacd.com](http://www.apacd.com)



### Quadriga University of Applied Sciences

Quadriga University of Applied Sciences Berlin educates managers in communication, leadership, human resources management, and public affairs. The University also offers a wide range of specialist executive and online further education courses for managers in business and politics.

[www.quadriga.eu](http://www.quadriga.eu)



### European Public Relations Education and Research Association (EUPRERA)

The European Public Relations Education and Research Association (EUPRERA) is an autonomous organisation with nearly 500 members from 40 countries interested in advancing academic research and knowledge in strategic communication. Several cross-national and comparative research and education projects are organised by affiliated universities, and a highly regarded academic congress is staged each autumn at varying locations.

[www.euprera.org](http://www.euprera.org)

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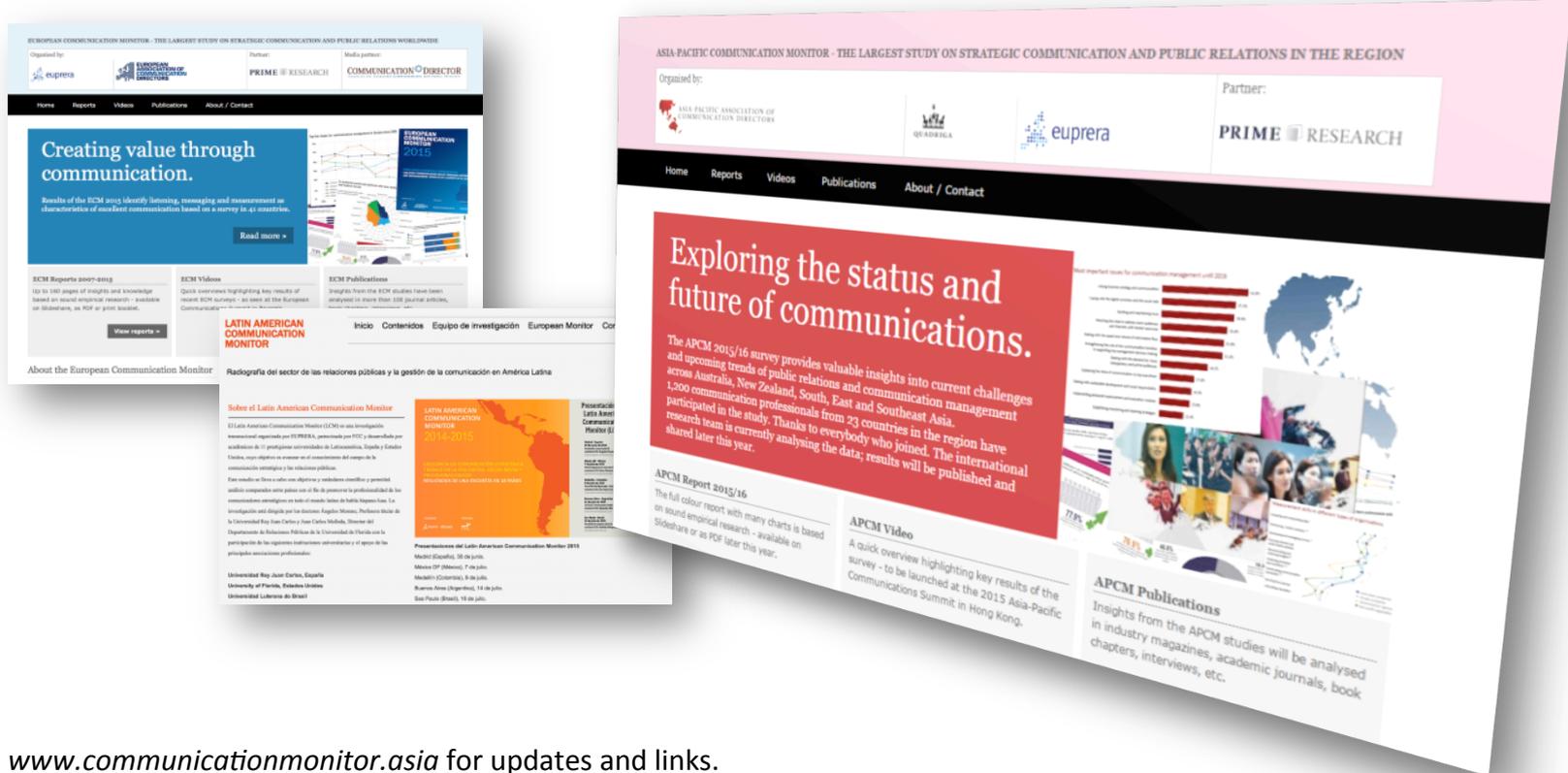
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## More information

A selection of material related to the Asia-Pacific Communication Monitor (APCM) including a web video highlighting key results of the study is available on the internet. Similar surveys with valuable data reports on the web are conducted in other regions of the world – the European Communication Monitor and the Latin American Communication Monitor. The Communication Monitor series is the largest research project on strategic communication and public relations worldwide.



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**The Asia-Pacific Communication Monitor (APCM) is an international research initiative conducted by the Asia-Pacific Association of Communication Directors (APACD), Quadriga University of Applied Sciences and the European Public Relations and Research Association (EUPRERA) in partnership with PRIME Research International and Communication Director magazine. The study is conducted with the aim to stimulate and promote the knowledge and practice of communication management in the region. Similar surveys have been initiated by the organisers in other regions in the world, i.e. Europe and Latin America.**

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