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STRATEGIC CHALLENGES, SOCIAL MEDIA AND PROFESSIONAL CAPABILTIES. RESULTS OF A SURVEY IN 22 COUNTRIES.

ASIA-PACIFIC COMMUNICATION MONITOR 2017/18

STRATEGIC CHALLENGES, SOCIAL MEDIA AND PROFESSIONAL CAPABILITIES.
RESULTS OF A SURVEY IN 22 COUNTRIES.

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Imprint

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Content

Foreword

The second Asia-Pacific Communication Monitor identifies the major strategic issues facing communication professionals in Asia-Pacific: chief among these is the digital evolution and the social web, identified here – as in the previous edition of the Monitor – as the most important strategic issue facing the communications sector over the next few years. From the challenge of addressing ever-growing channels and virtual audiences to the use of big data and algorithms, today's Asia-Pacific communicator puts digital firmly on top of his or her list of priorities.

On a more strategic level, the contribution of the communication function to organizational success is another major theme of this year's Asia-Pacific Communication Monitor, and, again, the Monitor suggests that there is room for growth: one third of respondents say that linking business strategy and communication is a top priority in the near future, while 28.6 per cent believe that the role of communications in supporting top-management decision making needs to be strengthened. Could the stasis found in the use of evaluation as reported in the previous edition of the Monitor be hindering communicators from becoming true strategic partners to their top management? The fact that linking business strategy and communication is the number two key issue overall reassures me that Asia-Pacific communicators are determined to address this challenge.

The expressed desire to make the business case for communications could also explain the fact is that only one third of respondents find their salary adequate, with job satisfaction of communication professionals in the region declined in 2017 compared with findings of the previous 2015/16 Monitor. A more clearly-defined link between communications and strategy will raise the standing of the function and increase job satisfaction among the sector's professionals. As the Monitor continues year on year, it will be fascinating to see how this dynamic develops.

As president of the Asia-Pacific Association of Communication Directors, I welcome the findings of the 2017 Asia-Pacific Communication Monitor, and on behalf of our network of leading communication professionals I look forward to taking part in the sector-wide dialogue about the future of our profession - a dialogue which is both underlined and informed by the Asia-Pacific Communication Monitor.

Pierre Goad

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

Introduction

Welcome to the second Asia-Pacific Communication Monitor. Following its launch in 2015/16 as a bi-annual survey as part of the global Communication Monitor series across more than 80 countries, this research provides valuable understanding of the communication industry in Asia-Pacific and insights into its future.

The 2017/18 findings are based on responses from 1,306 communication professionals in 22 Asia-Pacific countries representing practices in corporations, governmental and non-profit organisations as well as in communication agencies. This report identifies the major strategic issues facing communication professionals in Asia-Pacific. It also examines a number of other key areas including communication channels used, social media use, skills and capabilities, job satisfaction, and the characteristics of excellent communication departments.

Special thanks are expressed to the organisers and our partners who supported this study. The Asia-Pacific Association of Communication Directors (APACD), the European Public Relations Education and Research Association (EUPRERA), and Quadriga University of Applied Sciences jointly organised the study and provided valuable intellectual property and databases. Research teams of the European and Latin American Communication Monitor shared their data and instruments.

PRIME Research (partner); Nanyang Technological University, Singapore (academic partner); RFI Daylight, Hong Kong (video partner), and *Communication Director* magazine (media partner) provided valuable resources needed to run such a large-scale project.

An extended research team of leading academics across the region supported the core team and ensured that the survey reflects the diversity of the field across Asia-Pacific. The full research team is listed at the end of this report.

We also thank all professionals who contributed their valuable time to participate in this survey. They give Asia-Pacific a voice in this increasingly global research project and contribute to the development of the field.

Prof. Dr. Jim Macnamara, 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 study of strategic communication practice covering 22 countries in the region. Findings are derived from an online survey of communication professionals working in corporations, governmental and non-profit organisations, and communication agencies. The APCM is conducted in collaboration with similar studies in other regions including Europe (since 2007) and Latin America (since 2014). With more than 80 countries participating globally using comparable methodology and sharing common questions, the Communication Monitor studies are the most comprehensive research into strategic communication and public relations worldwide.

The research framework for the survey is designed to explore five key 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.). It examines a number of independent and dependent variables in nine categories outlined in the research framework on page 12.

The study explores four constructs. Firstly, developments and dynamics in the field of strategic communication (Hallahan et al., 2007; Holtzhausen & Zerfass, 2015) are identified by longitudinal comparisons of strategic issues, communication channels and job satisfaction. To this end, questions from the previous APCM survey (Macnamara et al., 2015) have been repeated. Secondly, regional and national differences are revealed by breaking down the results of this study to 13 key countries and by comparing results from Asia-Pacific to those from Europe and Latin America (Zerfass et al., 2016; Zerfass et al., 2017; Moreno et al., 2017). Thirdly, a selection of current challenges in the field are empirically tested. The APCM 2017/18 explores practices of communication (Van Ruler & Verčič, 2005), social media influencers (Freberg et al., 2011), social media and management capabilities (Tench & Moreno, 2015), competency development for communication professionals (Kiesenbauer, 2018), and the contribution of communication departments to organisational success (Zerfass & Volk, 2017). Fourthly, statistical methods and a benchmarking methodology (Verčič & Zerfass, 2016; Tench et al., 2017) are applied to describe communication departments that achieve excellence.

The design of the study provides insights to help communication professionals and industry bodies identify strengths and opportunities as well as weaknesses and threats. It also provides empirical findings to inform professional development, undergraduate and postgraduate education, and academic research.

Methodology and demographics

Methodology and demographics

The online questionnaire used for the Asia-Pacific Communication Monitor 2017/18 involved 26 questions arranged in 14 sections. These were based on research questions and hypotheses from previous research and issues highlighted in industry and academic literature. The questions sought responses on a range of scales, particularly five-point Likert scales graduated from 'very high to 'very low' and 'strongly agree' to 'strongly disagree'.

More than 20,000 communication professionals throughout Asia-Pacific were invited to participate via e-mails sent to a database provided by the Asia-Pacific Association of Communication Directors (APACD). Also, national research collaborators and supporting professional associations sent invitations to their communities and members.

The online survey in English language was hosted on a secure server and accessible through computers, tablets and mobile devices. It was pre-tested in April and May 2017 with communication professionals in 13 Asia-Pacific countries. Amendments were made where appropriate and the final questionnaire was activated online for six weeks from mid-May to early July 2017.

A total of 3,647 participants started the survey, with 1,306 professionals within the region fully completing the questionnaire. Incomplete surveys and responses from outside the sample were deleted from the dataset. The strict selection of participants avoids risks to the validity and reliability of the study that arise in other sampling methods such as snowball sampling in which students, academics, and others outside the field or region can gain access to the questionnaire.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results were tested statistically with, depending on the variable, Pearson's chi-square tests (χ^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 ($p \leq 0.01$), as indicated in the footnotes.

Three out of four participants are communication leaders, with 36.8 per cent holding a position as head of communication or as CEO of a communication consultancy, and 35.6 per cent working as unit leaders or in charge of a single communication discipline in an organisation. Participants are also quite experienced, with an average age of 45.0 years and 59.9 per cent having more than 10 years of experience in communication management. Despite reports of 'feminisation' of the PR field (Aldoory, 2007), gender balance was almost achieved in the sample, with 57.7 per cent of responses from females and 42.3 per cent from males.

Participants in the study are highly educated, with almost half (48.7 per cent) holding a Master's degree and 41.4 per cent holding a Bachelor's degree. A further 4.5 per cent hold a doctorate. One fifth of the participants (20.0 per cent) work in multinational organisations with roots in Asia-Pacific. Another 26.6 per cent represent multinational organisations headquartered in another continent, while 43.7 per cent work in national or local organisations.

Almost three out of four practitioners responding work in communication departments of organisations – with 29.6 per cent in joint stock (public) companies; 20.1 per cent in private companies, 12.6 per cent in government organisations; and 8.8 per cent in non-profit organisations, while 28.9 per cent are communication consultants working for agencies or freelance.

Research framework and questions

Person (Communication professional)			
Demographics	Education	Job status	Experience
Age, Q 20￼Gender, Q 21￼Membership in association(s), Q 24	Academic qualification, Q 22	Position and hierarchy level, Q 12￼Dominant areas of work, Q 19	Overall job experience (years), Q 22

Organisation	
Structure	Country
Type of organisation, Q 10￼Origin and scope, Q 11￼Alignment of the CCO / top communication manager, Q 14	Asia-Pacific country,￼Q 25, Q 26

Communication department	
Excellence	
Influence	Performance
Advisory influence, Q 15￼Executive influence, Q 16	Success, Q 17￼Quality & Ability, Q 18

Situation	
Dealing with social media influencers, Q 3￼Social media skills and knowledge, Q 5￼Management skills and knowledge, Q 6	Training programs offered/ facilitated by the organisation, Q 7￼ Time spent for various fields of communication practice, Q 8￼Job satisfaction, Q 9

Perception	
Strategic issues, Q 1￼Importance of communication channels and instruments, Q 2￼ Importance of social media influencers, Q 3￼Identifying social media influencers, Q 4	Needs for personal development, Q 7￼Contributions of communication departments to organisational success, Q 13￼Contributions demanded by top management, Q 13

Demographic background of participants

POSITION

Head of communication, agency CEO	36.8%
Team leader, unit leader	35.6%
Team member, consultant	20.4%
Other	7.2%

JOB EXPERIENCE

More than 10 years	59.9%
6 to 10 years	20.3%
Less than 5 years	19.9%

ORIGIN/SCOPE OF ORGANISATIONS

International organisation/company headquartered in Asia-Pacific	20.0%
International organisation/company headquartered on another continent	26.6%
National or local organisation/company	43.7%
Other	3.8%

ORGANISATION

Communication department 71.1%

Government-owned, public sector, political organisation 12.6%

Non-profit organisation, association 8.8%

Private company 20.1%

Joint stock company 29.6%

Communication consultancies, PR agencies, freelance consultants 28.9%
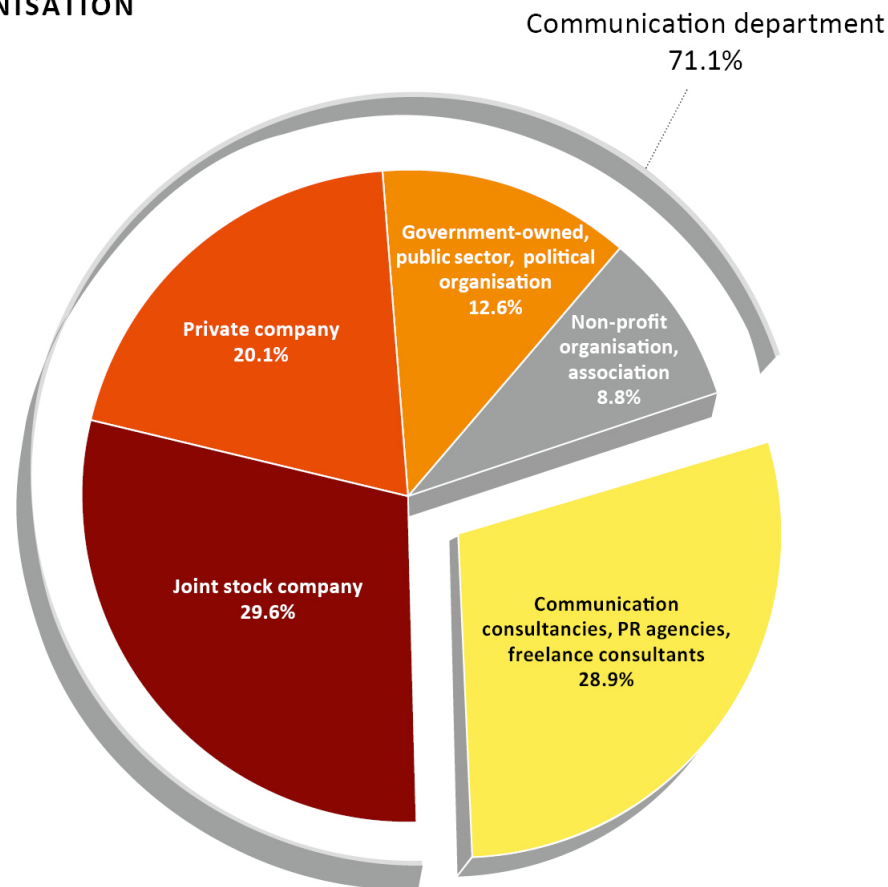
Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
FEMALE	57.7%	51.4%	60.0%	65.3%
MALE	42.3%	48.6%	40.0%	34.7%
AGE (ON AVERAGE)	45.9 yrs	39.1 yrs	34.8 yrs	40.8 yrs

Membership in a professional association

ASIA-PACIFIC ASSOCIATION OF COMMUNICATION DIRECTORS (APACD)	11.9%
OTHER INTERNATIONAL COMMUNICATION ASSOCIATION	17.5%
NATIONAL PR OR COMMUNICATION ASSOCIATION	36.8%

Highest academic education qualification*

DOCTORATE (PH.D. OR OTHER)	4.4%
MASTER (M.A., M.SC., M.B.A., MAG., ETC.)	48.6%
BACHELOR (B.A., B.SC., ETC.)	41.7%
POLYTECHNIC/TECHNICAL DIPLOMA	2.8%

Countries represented in the study

RESPONDENTS ARE BASED IN 22 COUNTRIES IN ASIA-PACIFIC

Australia	Bangladesh	Cambodia	China
Hong Kong (SAR)	India	Indonesia	Japan
Korea (Republic of)	Lebanon	Macau (SAR)	Malaysia
New Zealand	Pakistan	Philippines	Qatar
Saudi Arabia	Singapore	Taiwan	Thailand
United Arab Emirates	Vietnam		

**Strategic issues
for communication
management**

Chapter overview

Digitalisation, globalisation and other new demands in business and society provide challenges for communication management. It is useful to explore which trends are seen as most important by practitioners, as this indicates areas for future development and investment.

As in the previous 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. This priority is supported by every second participant and is consistent across companies, government, non-profit organisations, and consultancies and agencies. Change brought about through digitalisation is of particular concern in Malaysia, Hong Kong, India, the Philippines, Indonesia, Taiwan and Thailand, and of less concern in Japan, Australia, and Vietnam.

In addition, a number of other digitally related concerns have overtaken other strategic issues. 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 5' 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.

Building and maintaining trust, which was ranked third in terms of strategic importance in the 2015/16 study and is consistently rated high in Europe, was rated seventh in the 'top 10' strategic issues facing Asia-Pacific practitioners in the 2017/18 study. Asia-Pacific communication practitioners seem to be less concerned about building trust than their European counterparts, but they are still ahead of peers in Latin America in this respect (Zerfass et al., 2017; Moreno et al., 2017).

Strategic communication is expected to support organisational goals (Holtzhausen & Zerfass, 2015). This requires a close alignment of communication strategies with overall strategies and communication departments establishing a close link to top management. Along this line, one third of the respondents (34.9 per cent) say that linking business strategy and communication is a top priority in the near future, while 28.6 per cent believe that the role of communications in supporting top-management decision making needs to be strengthened. Both issues have slightly lost in importance compared to the 2015/16 survey, and Asia-Pacific professionals are behind their European colleagues in this respect. However linking communication to business goals is ranked second within the overall list of key issues, and even the number one topic in China and Vietnam. This is closely related to the need for rigorous planning and evaluation methods. The need for development identified in this study underlines the concerning finding of the previous APCM survey, which reported stasis in the develop-ment and use of evaluation in the region (Macnamara & Zerfass, 2017). Also, a recently published comprehensive review of evaluation of public communication worldwide has reported a lack of standards and a need for more rigorous methods (Macnamara, 2018).

Most important issues for strategic communication in Asia-Pacific until 2020

Issue	Percentage
Coping with the digital evolution and the social web	48.9%
Linking business strategy and communication	34.9%
Dealing with the speed and volume of information flow	33.5%
Using big data and/or algorithms for communication	32.4%
Matching the need to address more audiences and channels with limited resources	30.3%
Strengthening the role of the communication function in supporting top-management decision making	28.6%
Building and maintaining trust	26.8%
Dealing with the demand for more transparency and active audiences	21.4%
Dealing with sustainable development and social responsibility	21.3%
Explaining the value of communication to top executives	14.2%
Enable, coach and advise senior manager(s) and other staff	7.6%

www.communicationmonitor.asia / Macnamara et al. 2017 / n= 1,306 communication professionals from 22 countries. Q 1: Which issues will be most important for communication management/PR within the next three years from your point of view! Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Most important issues in different types of organisations in Asia-Pacific:
Non-profits are are struggling harder with information overload and demand
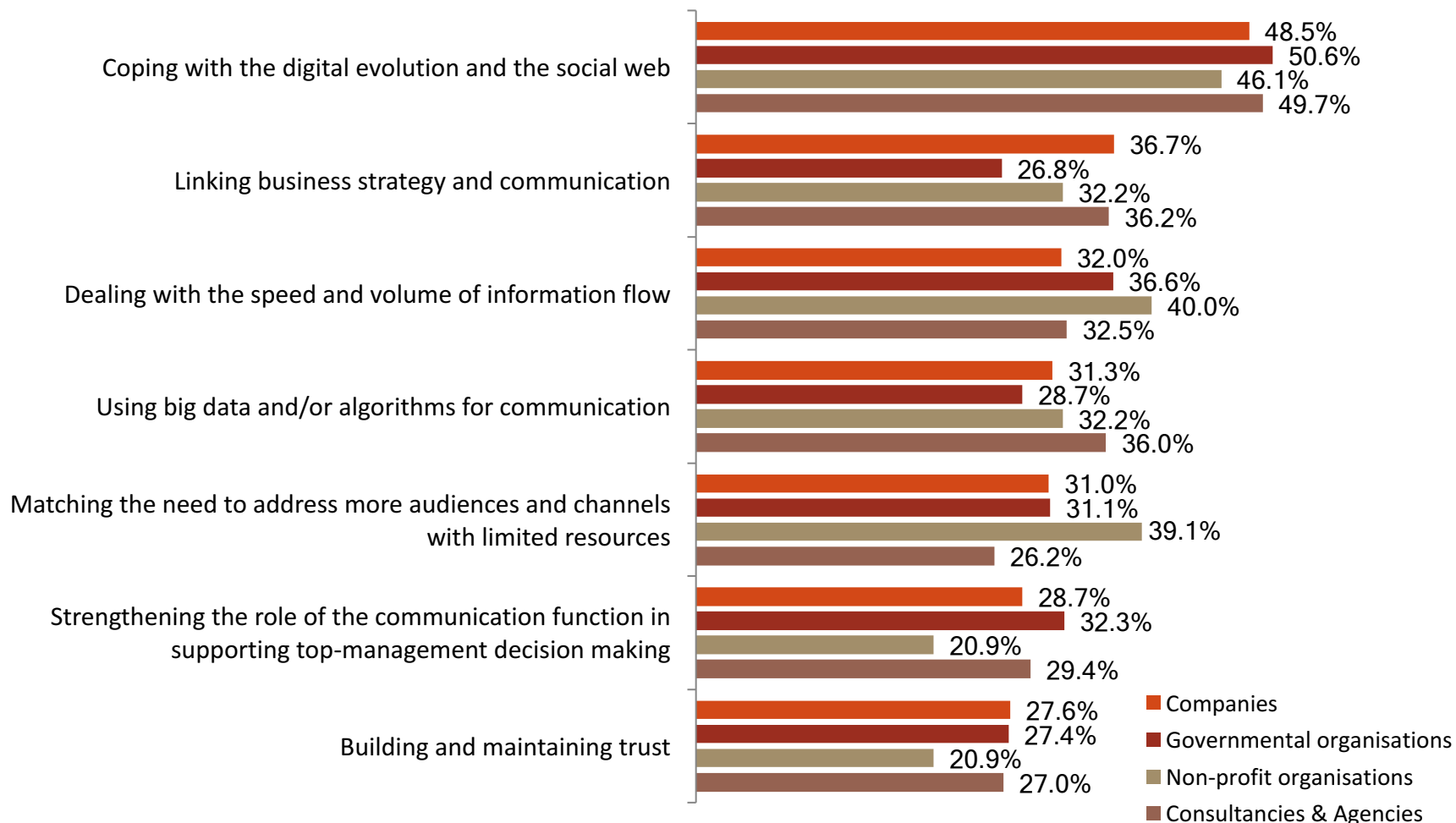
	Companies	Governmental organisations	Non-profit organisations	Consultancies & Agencies
Coping with the digital evolution and the social web	48.5%	50.6%	46.1%	49.7%
Linking business strategy and communication	36.7%	26.8%	32.2%	36.2%
Dealing with the speed and volume of information flow	32.0%	36.6%	40.0%	32.5%
Using big data and/or algorithms for communication	31.3%	28.7%	32.2%	36.0%
Matching the need to address more audiences and channels with limited resources	31.0%	31.1%	39.1%	26.2%
Strengthening the role of the communication function in supporting top-management decision making	28.7%	32.3%	20.9%	29.4%
Building and maintaining trust	27.6%	27.4%	20.9%	27.0%

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The issues of most concern to communicators in key countries in the region

Legend:
- Coping with the digital evolution and the social web
- Matching the need to address more audiences and channels with limited resources
- Dealing with the speed and volume of information flow
- Using big data and/or algorithms for communication

Chart axis labels: Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Thailand, Vietnam

Scale: 0% to 80%

Country-to-country ranking of most important issues for strategic communication until 2020

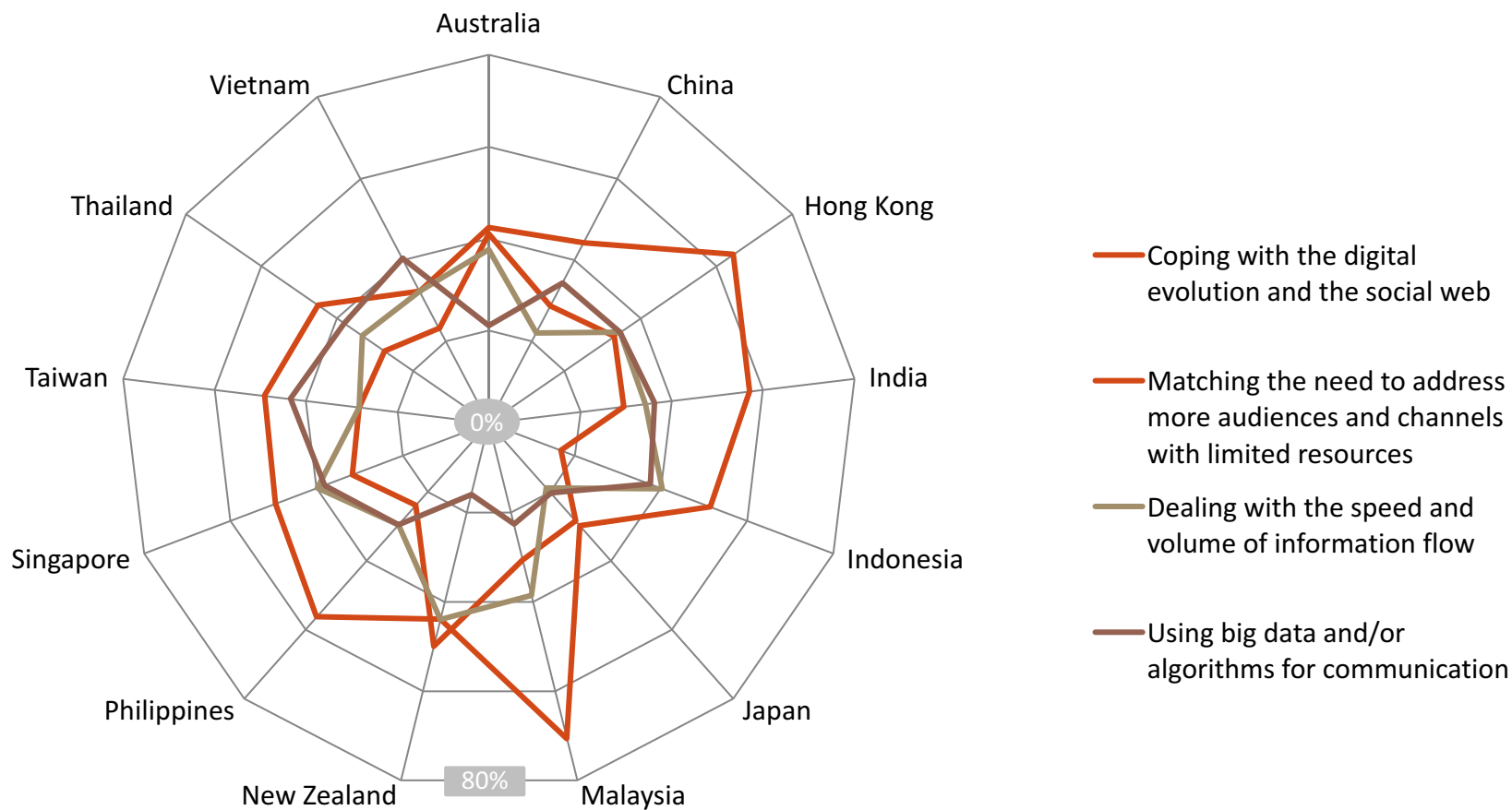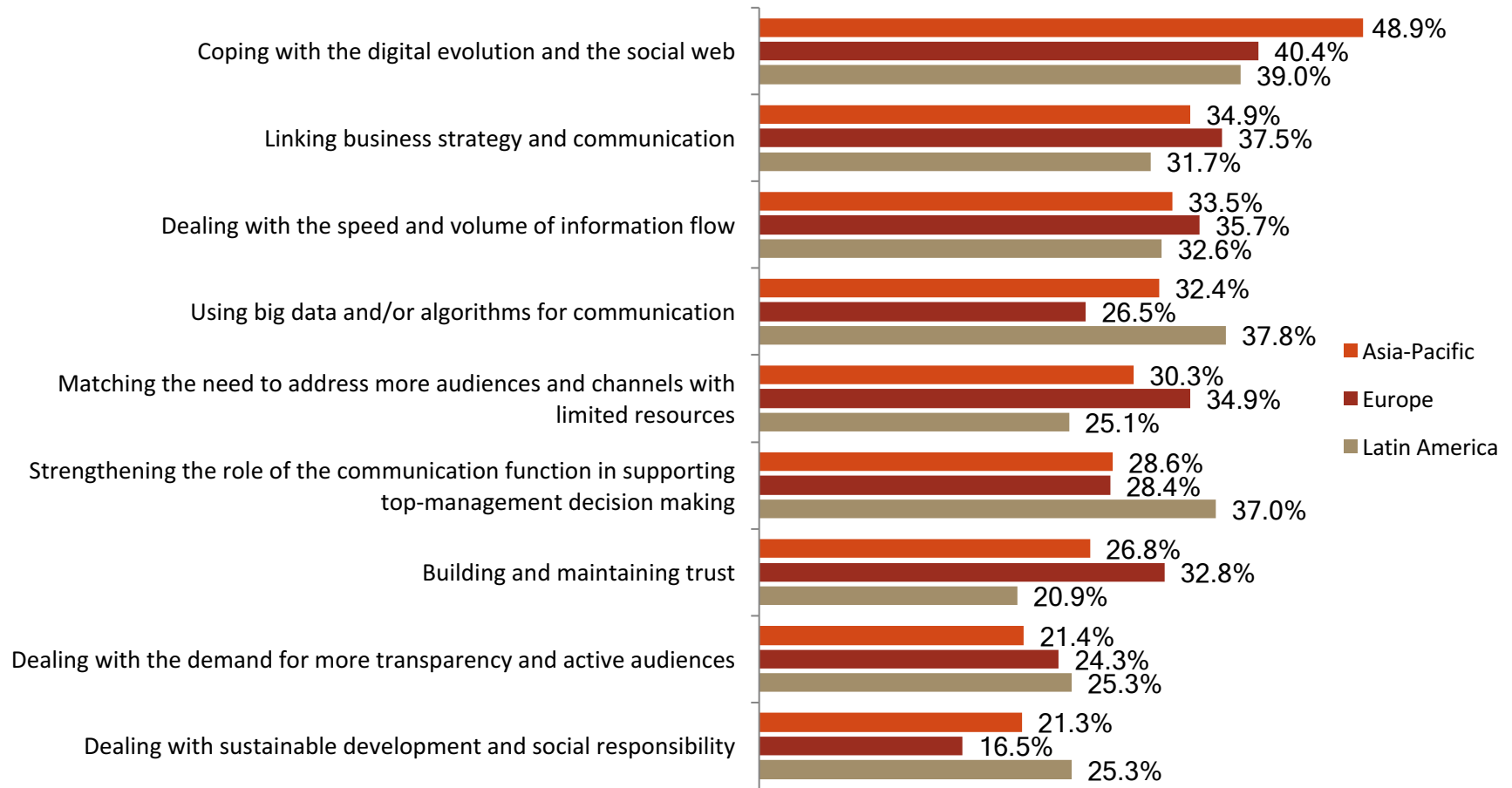| Strategic issue	Australia		China		Hong Kong		India		Indonesia		Japan		Malaysia		New Zealand		Philippines		Singapore		Taiwan		Thailand		Vietnam	
Coping with the digital evolution and the social web	1.	42.5%	2.	44.3%	1.	64.5%	1.	57.0%	1.	51.4%	4.	29.7%	1.	70.7%	2.	44.0%	1.	56.3%	1.	49.6%	1.	49.1%	1.	45.1%	4.	32.3%
Linking business strategy and communication	4.	36.3%	1.	46.7%	2.	34.7%	2.	37.6%	6.	25.0%	2.	39.2%	4.	28.0%	4.	28.0%	9.	16.9%	6.	29.3%	3.	41.5%	3.	35.3%	1.	42.4%
Dealing with the speed and volume of information flow	3.	37.7%	7.	22.1%	4.	34.7%	4.	34.2%	2.	40.3%	9.	18.9%	2.	38.7%	3.	44.0%	5.	29.6%	2.	39.8%	5.	28.3%	4.	33.3%	5.	32.3%
Using big data and/or algorithms for communication	8.	21.2%	3.	34.4%	3.	34.7%	3.	36.2%	3.	37.5%	8.	20.3%	8.	22.7%	9.	16.0%	6.	29.6%	3.	38.2%	2.	43.4%	2.	38.2%	2.	40.4%
Matching the need to address more audiences and channels with limited resources	2.	41.1%	6.	28.7%	5.	33.1%	5.	29.5%	10.	16.7%	5.	28.4%	3.	30.7%	1.	50.0%	8.	23.9%	4.	31.7%	6.	28.3%	6.	27.5%	7.	23.2%
Strengthening the role of the communication function in supporting top-management decision making	6.	29.5%	4.	32.0%	6.	30.6%	7.	22.8%	4.	31.9%	3.	39.2%	5.	26.7%	6.	26.0%	2.	40.8%	7.	27.6%	7.	24.5%	7.	24.5%	8.	22.2%
Building and maintaining trust	5.	32.9%	5.	30.3%	8.	18.5%	6.	24.2%	7.	20.8%	1.	45.9%	6.	24.0%	8.	18.0%	3.	33.8%	8.	25.2%	8.	20.8%	9.	19.6%	3.	33.3%
Dealing with the demand for more transparency and active audiences	7.	22.6%	10.	13.9%	7.	23.4%	9.	16.1%	9.	18.1%	11.	14.9%	7.	24.0%	5.	28.0%	7.	26.8%	5.	30.1%	9.	17.0%	8.	20.6%	9.	22.2%
Dealing with sustainable development and social responsibility	10.	11.0%	9.	15.6%	9.	12.9%	8.	22.8%	5.	29.2%	6.	25.7%	9.	21.3%	7.	24.0%	4.	32.4%	9.	11.4%	4.	30.2%	5.	30.4%	6.	28.3%
Explaining the value of communication to top executives	9.	15.8%	8.	22.1%	10.	9.7%	10.	13.4%	8.	19.4%	7.	21.6%	10.	8.0%	10.	12.0%	10.	9.9%	10.	11.4%	10.	11.3%	10.	17.6%	11.	11.1%
Enable. coach and advise senior manager(s) and other staff	11.	9.6%	11.	9.8%	11.	3.2%	11.	6.0%	11.	9.7%	10.	16.2%	11.	5.3%	11.	10.0%	11.	0.0%	11.	5.7%	11.	5.7%	11.	7.8%	10.	12.1%

www.communicationmonitor.asia / Macnamara et al. 2017 / n= 1.260 communication professionals from 13 countries. Q 1: Which issues will be most important for communication management/PR within the next three years from your point of view! Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

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

Coping with the digital evolution and the social web
- 2017: 48.9%
- 2015: 53.1%

Linking business strategy and communication
- 2017: 34.9%
- 2015: 41.0%

Dealing with the speed and volume of information flow
- 2017: 33.5%
- 2015: 30.4%

Matching the need to address more audiences and channels with limited resources
- 2017: 30.3%
- 2015: 29.7%

Strengthening the role of the communication function in supporting top-management decision making
- 2017: 28.6%
- 2015: 30.1%

Building and maintaining trust
- 2017: 26.8%
- 2015: 31.2%

Dealing with the demand for more transparency and active audiences
- 2017: 21.4%
- 2015: 26.2%

Dealing with sustainable development and social responsibility
- 2017: 21.3%
- 2015: 19.3%

Explaining the value of communication to top executives
- 2017: 14.2%
- 2015: 10.8%

Legend: ■ 2017 ■ 2015

www.communicationmonitor.asia / Macnamara et al. 2017 / n= 1,306 communication professionals; Macnamara et al. 2015 / n = 1,200 communication professionals. Q 1/5: Which issues will be most important for communication management/PR within the next three years from your point of view! Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Global trends: Communication professionals in Asia-Pacific are much more focused on digital issues, compared to their peers in Europe and Latin America

Coping with the digital evolution and the social web
- 48.9%
- 40.4%
- 39.0%

Linking business strategy and communication
- 34.9%
- 37.5%
- 31.7%

Dealing with the speed and volume of information flow
- 33.5%
- 35.7%
- 32.6%

Using big data and/or algorithms for communication
- 32.4%
- 26.5%
- 37.8%

Matching the need to address more audiences and channels with limited resources
- 30.3%
- 34.9%
- 25.1%

Strengthening the role of the communication function in supporting top-management decision making
- 28.6%
- 28.4%
- 37.0%

Building and maintaining trust
- 26.8%
- 32.8%
- 20.9%

Dealing with the demand for more transparency and active audiences
- 21.4%
- 24.3%
- 25.3%

Dealing with sustainable development and social responsibility
- 21.3%
- 16.5%
- 25.3%

Legend:
- Asia-Pacific
- Europe
- Latin America

Global Communication Monitor 2017 data based on surveying n = 5,605 communication professionals in 82 countries / Zerfass et al. 2017 / n = 3,387 professionals in Europe; Macnamara et al. 2017 / n = 1,306 professionals in Asia-Pacific; Moreno et al. 2017 / n = 912 professionals in Latin America. Q 5/1/9: Which issues will be most important for communication management / PR within the next three years from your point of view! Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Communication channels and instruments

Chapter overview

The digital revolution or what some prefer to call an evolution (Macnamara, 2014) has seen social media and social networks such as blogs, Twitter, and Weibo overtake traditional media as important communication channels in Asia Pacific (Adi & Macamara, 2016).

Today, 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. This reflects international research that shows digital and social media are changing the way practices such as public relations are conducted (Wright & Hinson, 2017).

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 previous APCM survey. China, Taiwan and the Philippines are leading the field here. Press and media relations with online journalists are ranked number three, followed by online communication via websites, e-mail, and intranets. All of these channels are perceived as important by more than eight out of ten professionals across the region.

Media relations with print newspapers and magazines has dramatically slipped from being the most important channel for communication with stakeholders and audiences (76.5 per cent rated this as important in 2015/16) to the eighth most important channel (61.5 per cent in 2017/18). The importance of television and radio journalists also has declined across the region to 67.0 per cent, except in the Philippines where 91.5 per cent of practitioners rated traditional broadcast media as important channels.

Reflecting the reported shift away from the traditional PESO (paid, earned, shared, owned) model of media use (Macnamara et al., 2016), corporate publishing such as customer and employee magazines, now predominantly in digital form, has increased in priority with 52.6 per cent of practitioners rating owned media as important in 2017/18 compared with 39.1 per cent in 2015/16.
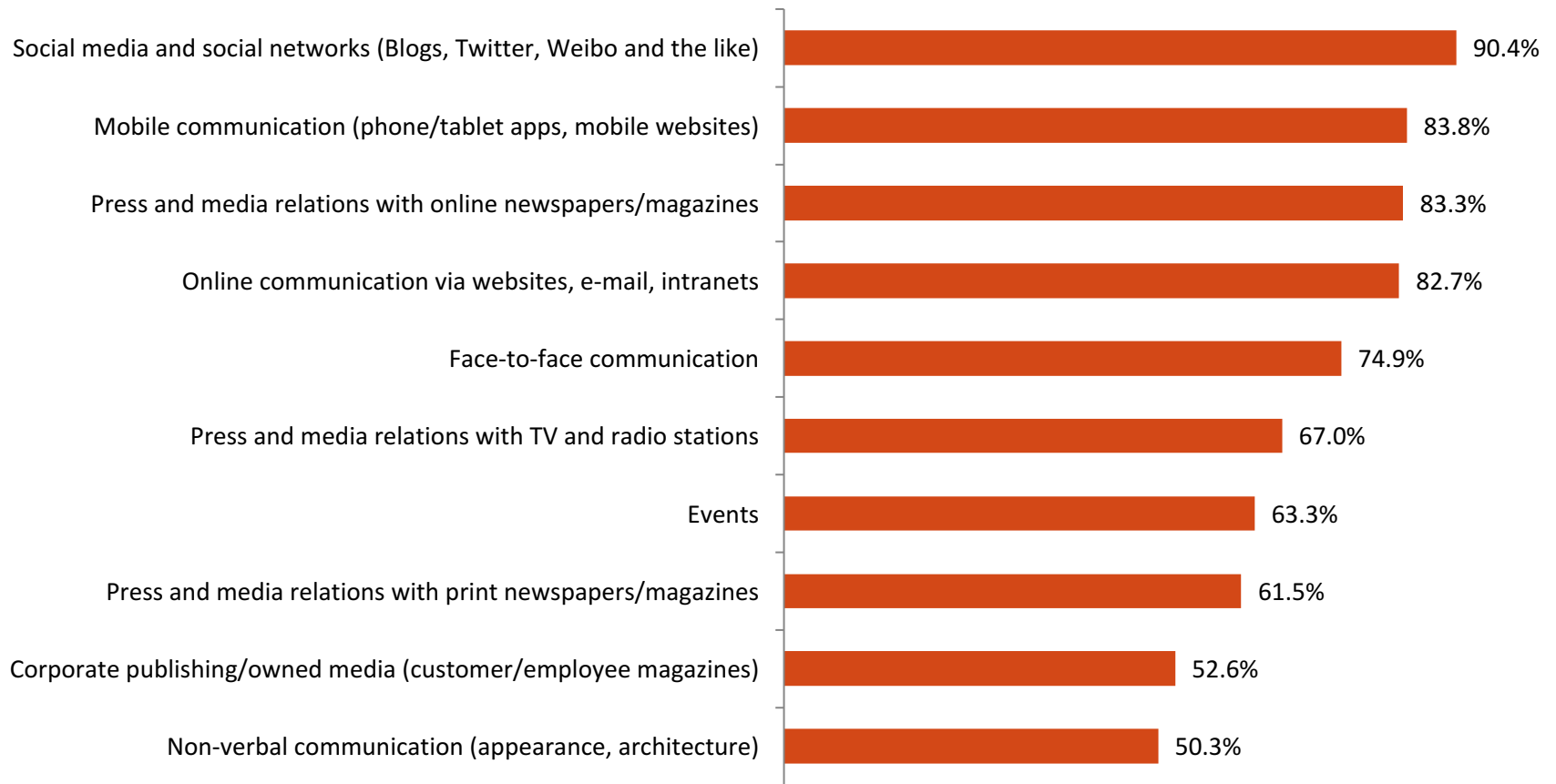
These trends are consistent across the region, although print newspapers and magazines remain more important in Japan and India than in other countries. Japan is the only country in the region where print media are rated as more important than social media. However online communication and relations with online journalists are stronger there.

Looking forward to 2020, Asia-Pacific practitioners foresee further growth in digital and mobile communication and a further decline in the importance of print newspapers and magazines and also a significant decline in the use of television.

The shift to digital and social media and mobile is as pronounced in Asia-Pacific as it is in Europe, but less so in Latin America (Zerfass et al., 2017; Moreno et al., 2017). Traditional print media are declining in importance, but they are still valued higher in Asia-Pacific than in the other regions studied. Face-to-face communication, however, is rated almost equally important globally with approximately three of four practitioners supporting this way of connecting with stakeholders.

Importance of communication channels in Asia-Pacific

Perceived importance for addressing stakeholders, gatekeepers and audiences today

Channel	Percentage
Social media and social networks (Blogs, Twitter, Weibo and the like)	90.4%
Mobile communication (phone/tablet apps, mobile websites)	83.8%
Press and media relations with online newspapers/magazines	83.3%
Online communication via websites, e-mail, intranets	82.7%
Face-to-face communication	74.9%
Press and media relations with TV and radio stations	67.0%
Events	63.3%
Press and media relations with print newspapers/magazines	61.5%
Corporate publishing/owned media (customer/employee magazines)	52.6%
Non-verbal communication (appearance, architecture)	50.3%

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 1,280 communication professionals from 22 countries. Q 2: 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.

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

Channel	2017	2015	Change
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

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 1,280 communication professionals; Macnamara et al. 2015 / n ≥ 1,148 communication professionals. Q 2/4: 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.
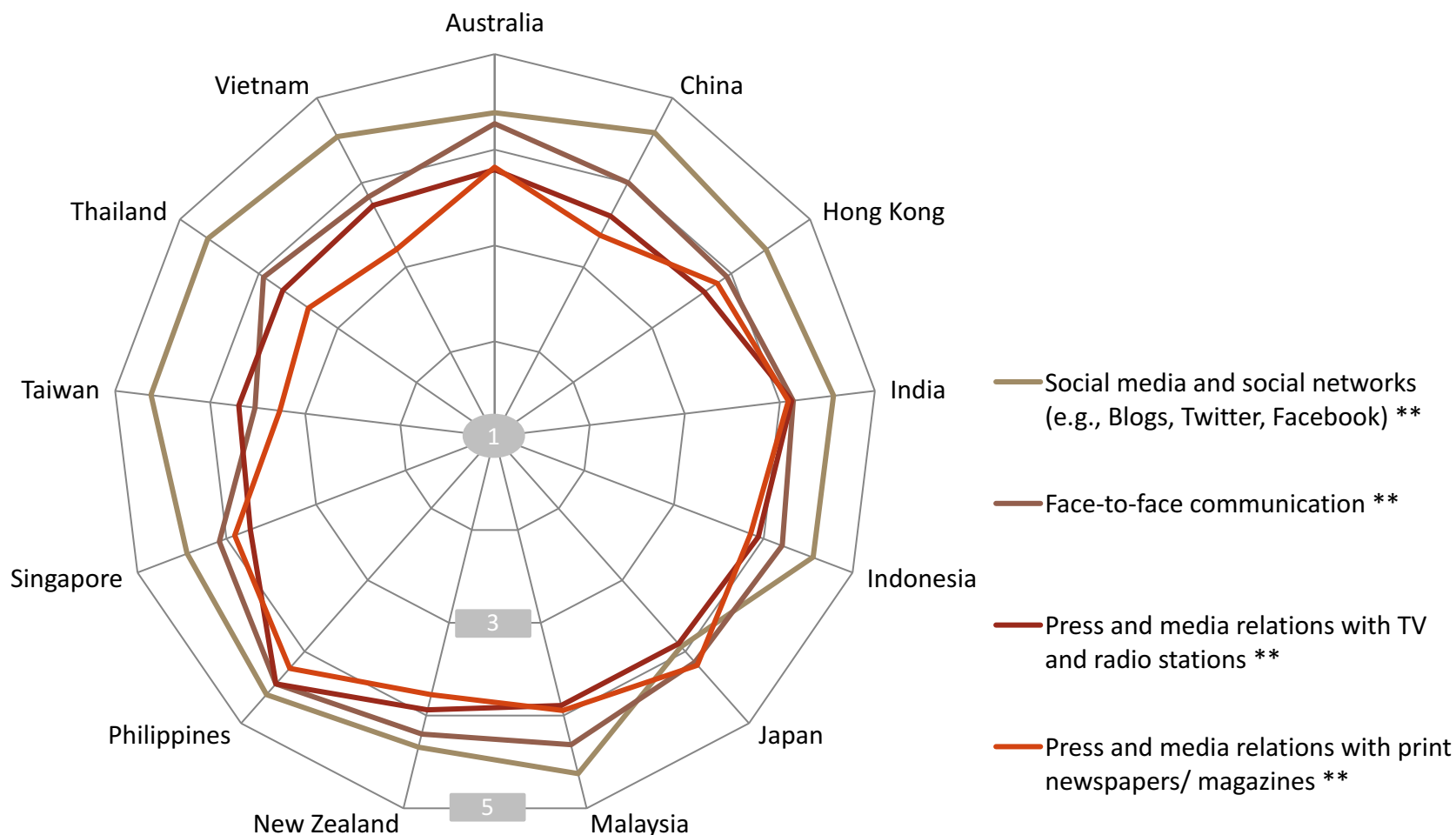
Outlook and longitudinal analysis: Print media relations lose in importance

Perceived importance for addressing stakeholders, gatekeepers and audiences in 2015, 2017 and 2020

Method	2020	2017	2015
Social media and social networks (Blogs, Twitter, Weibo and the like)	94.0%	90.4%	75.0%
Mobile communication (phone/tablet apps, mobile websites)	91.3%	83.8%	66.5%
Press and media relations with online newspapers/magazines	78.7%	83.3%	73.2%
Online communication via websites, e-mail, intranets	83.4%	82.7%	73.6%
Face-to-face communication	69.5%	74.9%	71.2%
Press and media relations with TV and radio stations	54.6%	67.0%	66.8%
Events	61.6%	63.3%	59.8%
Press and media relations with print newspapers/magazines	39.1%	61.5%	76.5%
Corporate publishing/owned media (customer/employee magazines)	52.0%	52.6%	39.1%
Non-verbal communication (appearance, architecture)	52.9%	50.3%	42.3%

Importance of strategic communication channels and instruments in key countries across the region today

Legend:
- Social media and social networks (e.g., Blogs, Twitter, Facebook) **
- Face-to-face communication **
- Press and media relations with TV and radio stations **
- Press and media relations with print newspapers/ magazines **

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 1,236 communication professionals from 13 countries. Q 2: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? Scale 1 (Not important) – 5 (Very important). Mean values. ** Highly significant differences for all items (ANOVA/Scheffe post-hoc test, p ≤ 0.01).
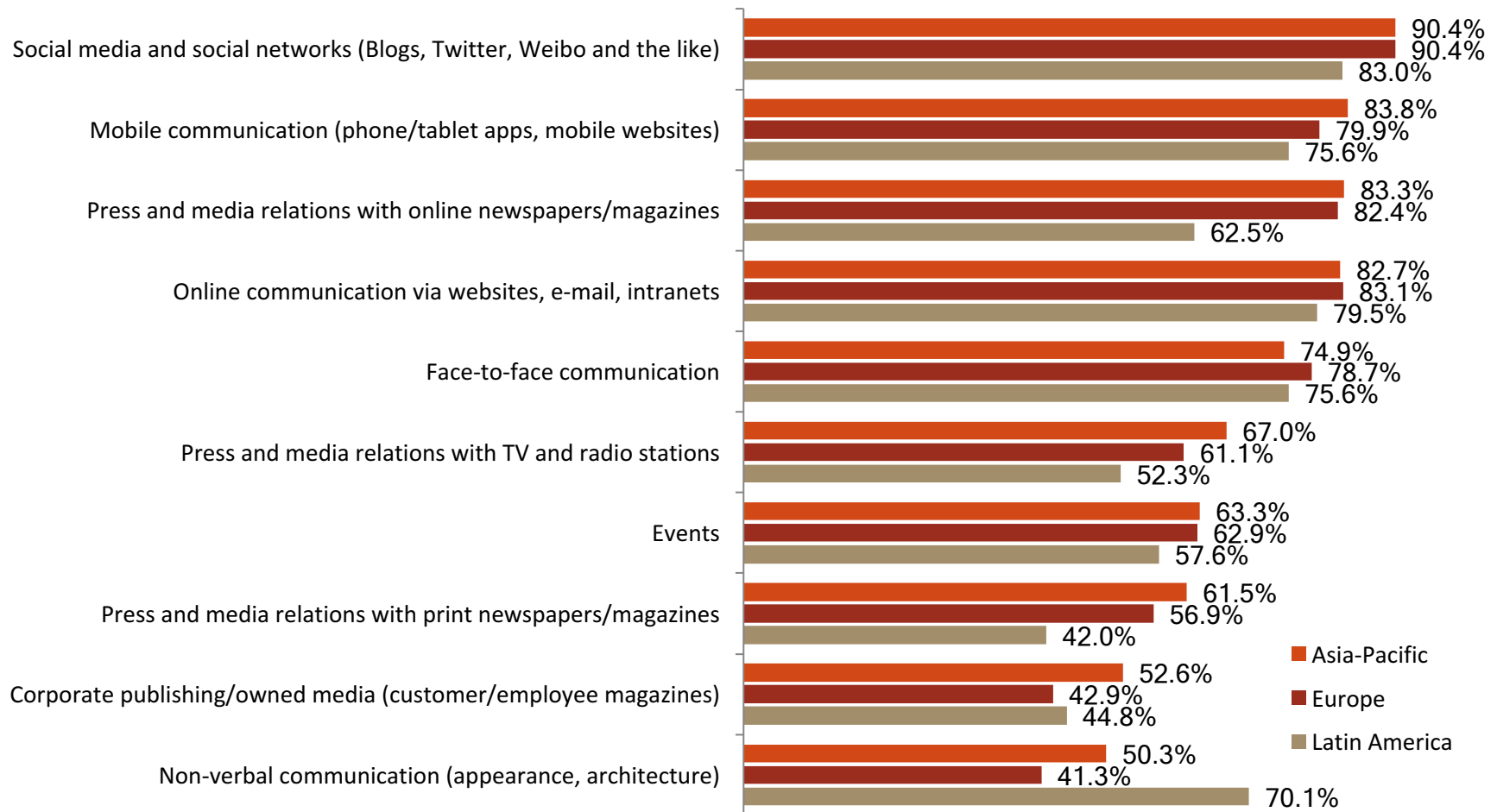
Country-by-country comparison of important communication channels for strategic communication in Asia-Pacific

Perceived importance for addressing stakeholders, gatekeepers and audiences today

	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Social media and social networks (Blogs, Twitter, Weibo and the like)	88.0%	91.5%	90.3%	92.5%	95.8%	70.3%	94.7%	88.0%	94.4%	90.0%	94.3%	95.1%	93.9%
Mobile communication (phone/ tablet apps, mobile websites)	76.9%	89.9%	83.9%	81.9%	88.9%	64.9%	89.2%	77.6%	93.0%	83.3%	94.2%	91.2%	80.6%
Press and media relations with online newspapers / magazines	79.0%	73.1%	90.3%	88.4%	87.5%	78.4%	78.7%	82.0%	94.4%	85.2%	84.9%	85.3%	81.3%
Online communication via websites, e-mail, intranets	82.4%	73.1%	83.7%	81.5%	87.5%	79.7%	87.8%	82.0%	87.1%	86.9%	79.2%	89.1%	81.3%
Face-to-face communication	82.5%	68.1%	74.2%	76.8%	81.4%	78.4%	83.6%	77.6%	94.4%	72.1%	49.0%	73.3%	66.3%
Press and media relations with TV and radio stations	64.6%	55.5%	61.8%	76.0%	73.6%	70.3%	67.6%	66.0%	91.5%	61.5%	58.5%	64.4%	64.3%
Events	47.6%	76.3%	52.0%	62.7%	76.4%	59.5%	75.7%	54.0%	76.1%	51.2%	77.4%	65.3%	68.4%
Press and media relations with print newspapers / magazines	65.7%	47.1%	66.1%	71.9%	69.4%	75.7%	72.0%	64.0%	81.7%	70.5%	41.5%	46.5%	35.7%
Corporate publishing / owned media (customer and employee magazines)	54.2%	48.3%	49.2%	49.0%	47.2%	60.8%	56.2%	67.3%	60.6%	56.9%	55.8%	48.0%	48.5%
Non-verbal communication (appearance, architecture)	42.7%	45.4%	46.0%	54.6%	66.7%	44.6%	53.4%	38.0%	66.2%	49.6%	37.7%	63.4%	46.4%

Global comparison: Asia-Pacific communicators prefer social and mobile more than peers in other regions; media relations are least important in Latin America

Method	Asia-Pacific	Europe	Latin America
Social media and social networks (Blogs, Twitter, Weibo and the like)	90.4%	90.4%	83.0%
Mobile communication (phone/tablet apps, mobile websites)	83.8%	79.9%	75.6%
Press and media relations with online newspapers/magazines	83.3%	82.4%	62.5%
Online communication via websites, e-mail, intranets	82.7%	83.1%	79.5%
Face-to-face communication	74.9%	78.7%	75.6%
Press and media relations with TV and radio stations	67.0%	61.1%	52.3%
Events	63.3%	62.9%	57.6%
Press and media relations with print newspapers/magazines	61.5%	56.9%	42.0%
Corporate publishing/owned media (customer/employee magazines)	52.6%	42.9%	44.8%
Non-verbal communication (appearance, architecture)	50.3%	41.3%	70.1%

Global Communication Monitor 2017 data based on surveying n ≥ 5,380 communication professionals in 82 countries / Zerfass et al. 2017 / n ≥ 3,268 professionals in Europe / Macnamara et al. 2017 / n ≥ 1,280 professionals in Asia-Pacific;; Moreno et al. 2017 / n ≥ 832 professionals in Latin America. Q 6/2/12: 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.

Social media influencers

Chapter overview

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 (Lindsay et al., 2015; Khamis et al., 2017). Examples are professional and part-time bloggers, as well as community activists.

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. 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.
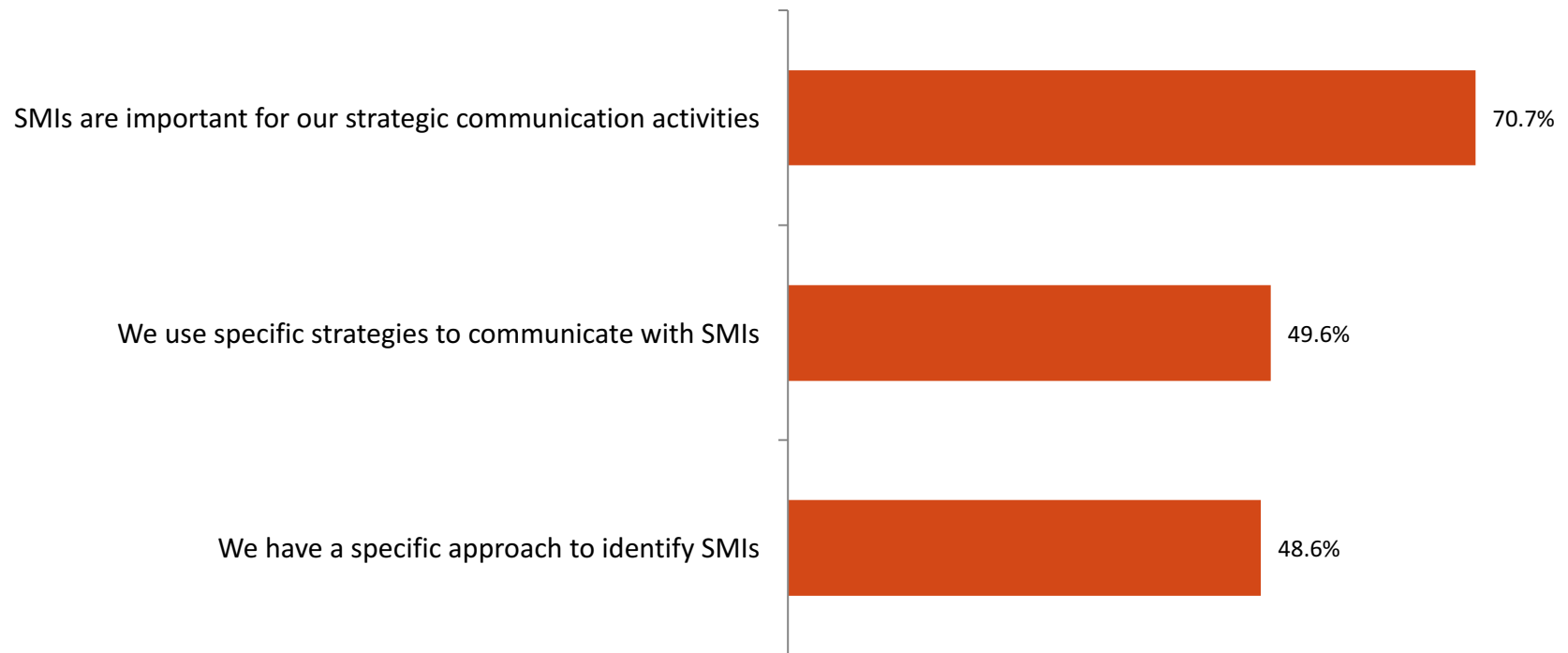
Consultancies and agencies are more focused on and advanced in engaging with SMIs than companies, governmental, or non-profit organisations. When looking into details, the data reveal that private companies are more advanced than publicly listed companies in implementing strategies for identifying and engaging with SMIs. Overall, this suggests that communication departments in organisations of all kind could benefit by hiring external support for this work, and that developing social media influencer strategies is a business growth area for consultancies and agencies.

The factors considered most relevant in identifying social media influencers are the relevance of topics discussed (91.0 per cent), the quality of content that they share online (87.1 per cent), their personal reputation (86.4 per cent), and their network position – that is, whether they are a prominent 'hub' or 'node' (84.1 per cent). The productivity of influencers (i.e. the number of messages published in a given time period) is considered as less important. Obviously, quality is more relevant than quantity when assessing the role of gatekeepers in multi-step flows of information in the digital world.
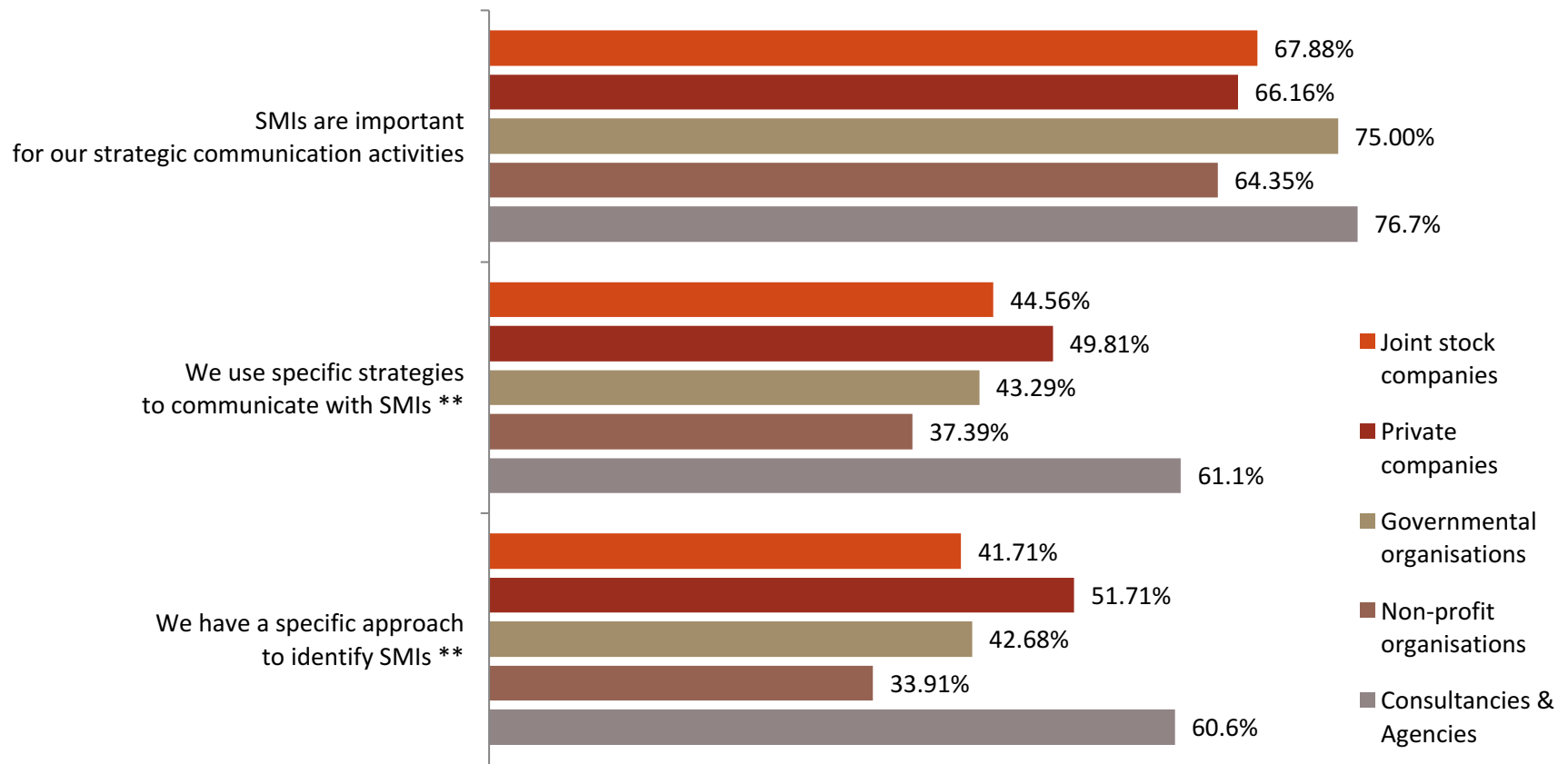
Given the importance of social media influencers, identification of and engagement with SMIs appears to be a key area of communication strategy for future development in Asia-Pacific. Many organisations have not fully utilised the potential of third-party endorsement and opinion leadership in social networks. A growing body of research shows valuable insights are available from mining social media data. More and more software applications are available for conducting social network analysis, also referred to as social network mapping, which can visualise connected hubs, nodes, and clusters in networks based on links (Xu & Li, 2013; Himelboim et al., 2017).

Social media influencers are important, but only every second organisation employs specific strategies for identifying and approaching them

Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media."

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%

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 3: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitud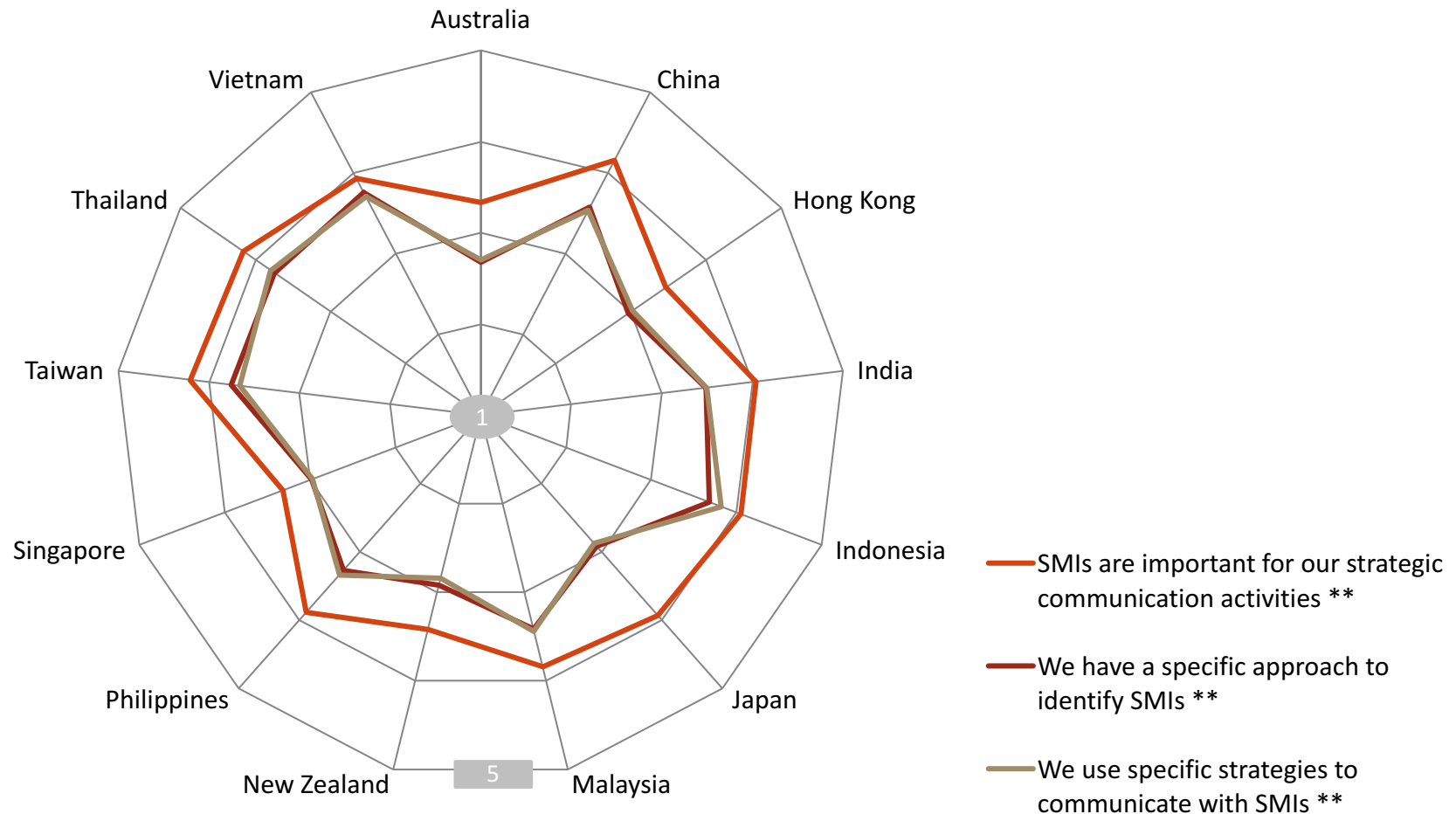es through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4-5.

Consultancies and agencies are more experienced in dealing with social media influencers; non-profits are lagging behind

SMIs are important for our strategic communication activities
- 67.88%
- 66.16%
- 75.00%
- 64.35%
- 76.7%

We use specific strategies to communicate with SMIs *
- 44.56%
- 49.81%
- 43.29%
- 37.39%
- 61.1%

We have a specific approach to identify SMIs *
- 41.71%
- 51.71%
- 42.68%
- 33.91%
- 60.6%

Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations
- Consultancies & Agencies

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 3: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Social media influencer assessment and engagement differs significantly across Asia-Pacific

SMIs are important for our strategic communication activities **

We have a specific approach to identify SMIs **

We use specific strategies to communicate with SMIs **

Country-to-country comparison of dealing with social media influencers in strategic communication

	SMIs are important for our strategic communication activities	We use specific strategies to communicate with SMIs	We have a specific approach to identify SMIs
Australia	49.3%	28.1%	30.1%
China	83.6%	58.2%	57.4%
Hong Kong	58.9%	37.9%	40.3%
India	80.5%	53.0%	57.0%
Indonesia	81.9%	65.3%	70.8%
Japan	81.1%	35.1%	33.8%
Malaysia	72.0%	50.7%	57.3%
New Zealand	60.0%	38.0%	32.0%
Philippines	73.2%	43.7%	46.5%
Singapore	53.7%	39.8%	36.6%
Taiwan	88.7%	60.4%	54.7%
Thailand	83.3%	65.7%	68.6%
Vietnam	73.7%	66.7%	65.7%

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,260 communication professionals from 13 countries. Q 3: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4-5. Highly significant differences for all items based on mean values (ANOVA/Scheffe post-hoc test), not on frequency/percentages (chi-square test).

Important factors for identifying social media influencers: Content matters most

Factor	Percentage
Relevance of topics/issues covered	91.0%
Qualitative outreach (content shared/forwarded by others)	87.1%
Personal reputation	86.4%
Network position (number, reputation and influence of people linked to an influencer)	84.1%
Reputation of the affiliated organisation	79.4%
Quantitative outreach (followers)	73.4%
Productivity (number of messages/content published)	58.4%

Important indicators to identify SMIs in key countries across Asia-Pacific

	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Relevance of topics/issues covered	95.1%	89.8%	91.5%	91.2%	93.1%	84.9%	95.9%	89.6%	94.3%	92.4%	92.2%	92.1%	81.5%
Qualitative outreach (content shared/forwarded by others)	80.6%	84.6%	90.8%	85.1%	90.3%	78.1%	90.3%	85.4%	98.6%	95.8%	80.8%	95.1%	80.9%
Personal reputation	89.6%	76.3%	82.4%	89.1%	90.3%	79.5%	94.4%	93.8%	95.7%	94.1%	78.8%	84.3%	82.1%
Network position (number, reputation and influence of people linked to an influencer)	78.5%	87.2%	79.8%	87.9%	93.1%	72.6%	91.8%	75.0%	90.0%	83.9%	88.5%	84.3%	83.9%
Reputation of the affiliated organisation	85.3%	69.5%	77.5%	82.4%	88.9%	70.8%	93.0%	85.4%	90.0%	82.1%	71.2%	72.5%	66.7%
Quantitative outreach (followers)	69.4%	72.6%	67.5%	71.4%	80.6%	65.8%	82.2%	75.0%	85.7%	72.4%	75.0%	84.3%	64.5%
Productivity (number of messages/content published)	40.3%	57.3%	47.5%	68.7%	69.4%	50.0%	73.6%	44.7%	84.3%	45.8%	69.2%	63.7%	55.9%

**Social media
skills and knowledge**

Chapter overview

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

On the positive side, the 2017/18 study shows improvement in social media skills compared with the 2015/16 Asia-Pacific Communication Monitor – albeit only slightly in some key areas. For example, practitioners across the region rated themselves an average of 3.52 on a five-point scale for 'developing social media strategies' in 2015/16, which improved to an average score of 3.56 in 2017/18. It is interesting to see that Asia-Pacific practitioners rated themselves higher in social media skills than practitioners in Europe and Latin America.
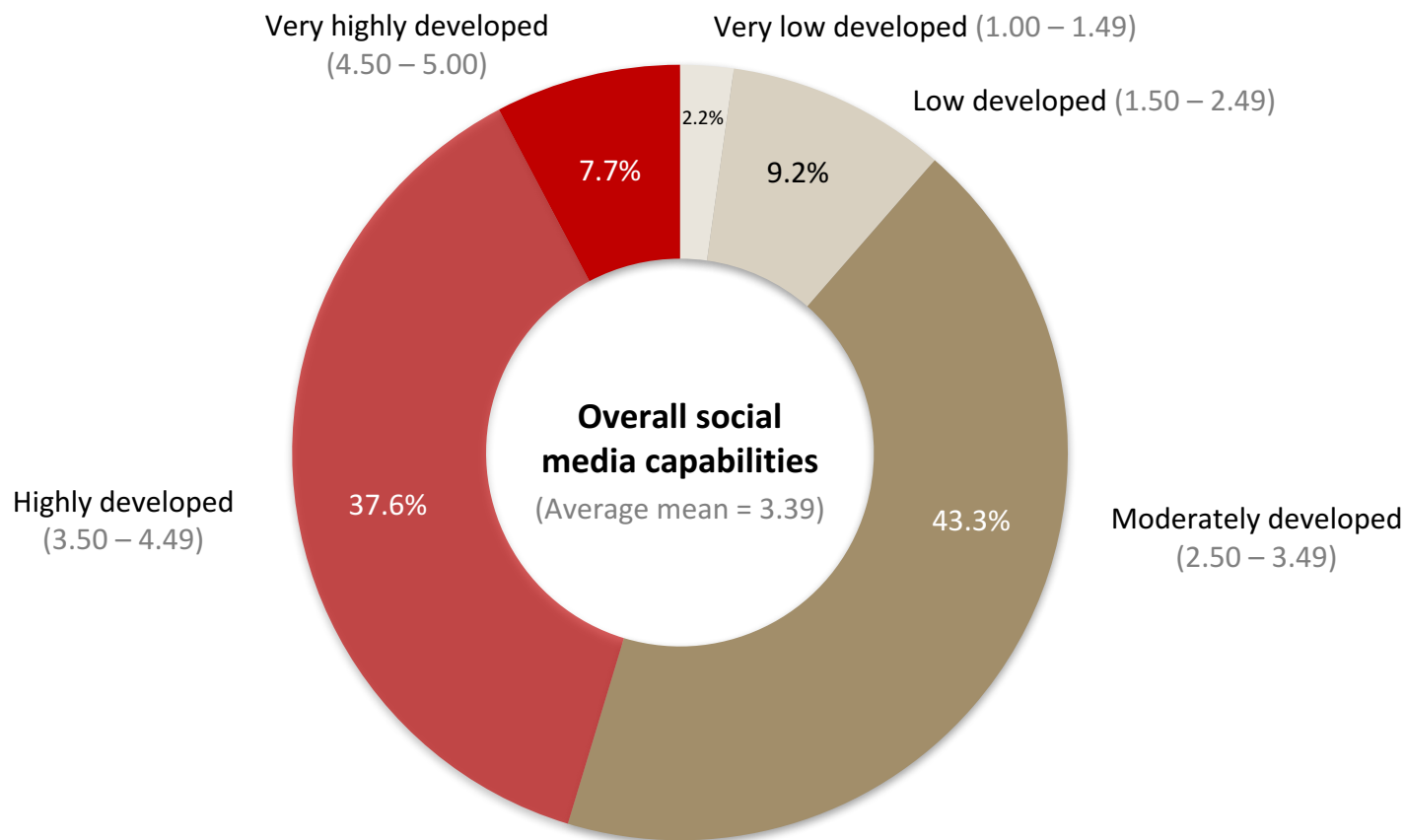
Of concern though is that most practitioners in Asia-Pacific rated themselves highest for delivering messages via social media (66.7 per cent), compared with knowing about social media trends (60.6 per cent), developing social media strategies (55.1 per cent), and evaluating social media (54 per cent). Only 39.0 per cent of practitioners rated 'initiating web-based dialogues with stakeholders' as a strength, with an average competency rating of 3.18 on a five-point Likert scale – i.e., just above average.

This, and the previous findings, indicate that communication professionals continue to mostly use interactive social media for broadcasting and speaking on behalf of their organisations rather than engaging in two-way communication and listening – an approach that has been criticised by communication researchers and social media experts (Duhé & Wright, 2013; Kent, 2013; Macnamara, 2014, 2016; Macnamara & Zerfass, 2012).

Also, practitioners acknowledge a lack of digital knowledge and skills more broadly, such as in the use of algorithms and technologies associated with analysis of 'big data', despite identifying these activities as important (see pp. 16-23).

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.

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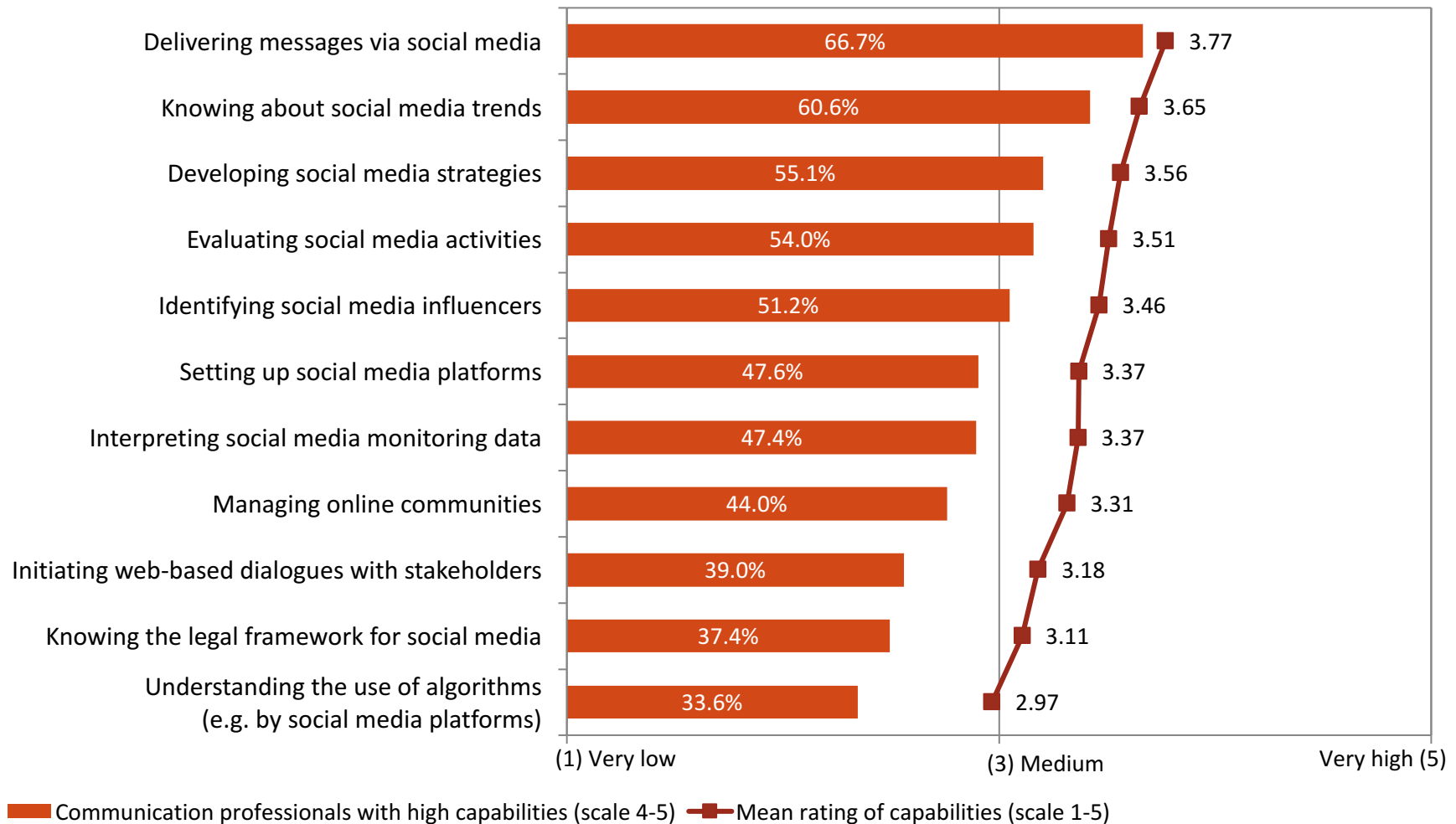

Very highly developed (4.50 – 5.00)

Very low developed (1.00 – 1.49)

Low developed (1.50 – 2.49)

2.2%

7.7%

9.2%

Overall social media capabilities
(Average mean = 3.39)

Highly developed (3.50 – 4.49)

37.6%

43.3%

Moderately developed (2.50 – 3.49)

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 5: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Percentages based on categorized overall mean values for 11 items representing social media skills (see page 44 for details).

Country-by-country comparison of social media capabilities: Lowest skill level reported by Japanese professionals

Australia (3.21)
China (3.73)
Hong Kong (3.14)
India (3.43)
Indonesia (3.79)
Japan (2.99)
Malaysia (3.23)
New Zealand (3.24)
Philippines (3.42)
Singapore (3.20)
Taiwan (3.59)
Thailand (3.58)
Vietnam (3.54)

Overall social media capabilities
(Average mean = 3.39)

Social media capabilities in detail: communicators are best in messaging and spotting trends, but less experienced in conducting dialogues and using big data

Capability	Communication professionals with high capabilities (scale 4-5)	Mean rating of capabilities (scale 1-5)
Delivering messages via social media	66.7%	3.77
Knowing about social media trends	60.6%	3.65
Developing social media strategies	55.1%	3.56
Evaluating social media activities	54.0%	3.51
Identifying social media influencers	51.2%	3.46
Setting up social media platforms	47.6%	3.37
Interpreting social media monitoring data	47.4%	3.37
Managing online communities	44.0%	3.31
Initiating web-based dialogues with stakeholders	39.0%	3.18
Knowing the legal framework for social media	37.4%	3.11
Understanding the use of algorithms (e.g. by social media platforms)	33.6%	2.97

(1) Very low   (3) Medium   Very high (5)

■ Communication professionals with high capabilities (scale 4-5)   ■— Mean rating of capabilities (scale 1-5)

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 5: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Percentages: Frequencies based on scale points 4-5. Mean values.
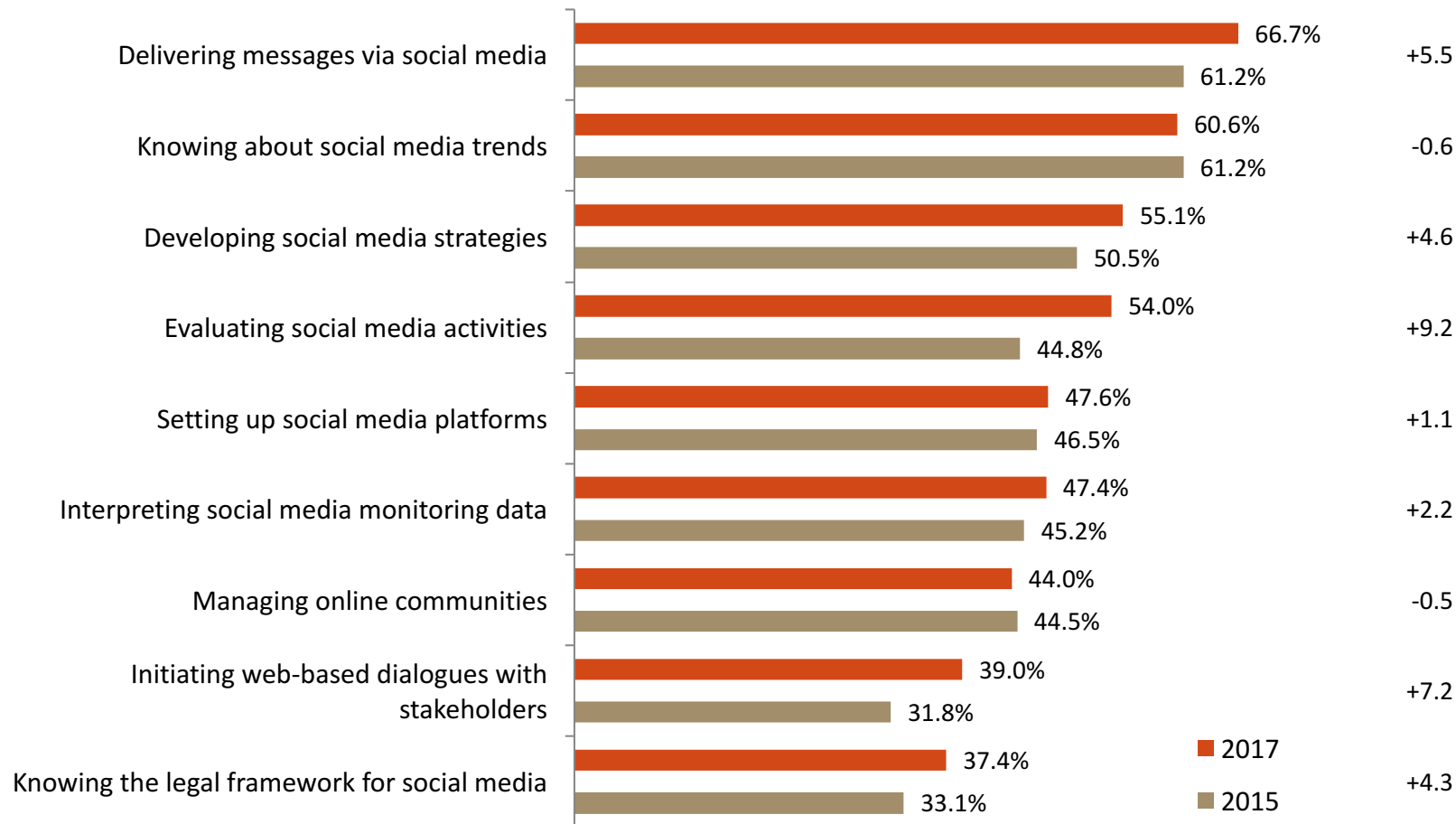
44

Country-by-country comparison of social media capabilities

	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Delivering messages via social media **	3.88	3.93	3.45	3.86	4.11	3.14	3.61	3.86	3.85	3.63	3.74	3.97	3.88
Knowing about social media trends **	3.42	4.05	3.44	3.63	4.00	3.18	3.41	3.48	3.61	3.50	3.92	3.91	3.82
Developing social media strategies **	3.44	3.94	3.33	3.67	4.07	3.04	3.37	3.42	3.62	3.29	3.74	3.67	3.63
Evaluating social media activities *	3.30	3.79	3.27	3.60	3.92	3.16	3.33	3.30	3.48	3.42	3.64	3.69	3.65
Identifying social media influencers **	3.16	3.87	3.05	3.64	3.99	2.95	3.36	3.20	3.59	3.15	3.81	3.69	3.68
Setting up social media platforms **	3.22	3.62	3.19	3.50	3.81	2.85	3.33	3.08	3.39	3.34	3.28	3.50	3.48
Interpreting social media monitoring data **	3.25	3.65	3.21	3.36	3.79	3.09	3.17	3.30	3.34	3.13	3.47	3.58	3.44
Managing online communities *	3.10	3.66	3.02	3.32	3.71	2.99	3.21	3.06	3.35	3.12	3.60	3.54	3.58
Initiating web-based dialogues with stakeholders **	3.06	3.46	2.96	3.29	3.39	2.92	2.99	3.20	3.27	2.99	3.66	3.13	3.17
Knowing the legal framework for social media **	2.95	3.50	2.83	3.00	3.54	2.91	2.81	3.14	3.23	2.80	3.28	3.31	3.42
Understanding the use of algorithms (e.g. by social media platforms) **	2.49	3.53	2.80	2.85	3.40	2.69	2.92	2.64	2.89	2.76	3.38	3.39	3.18

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 5: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. * Sign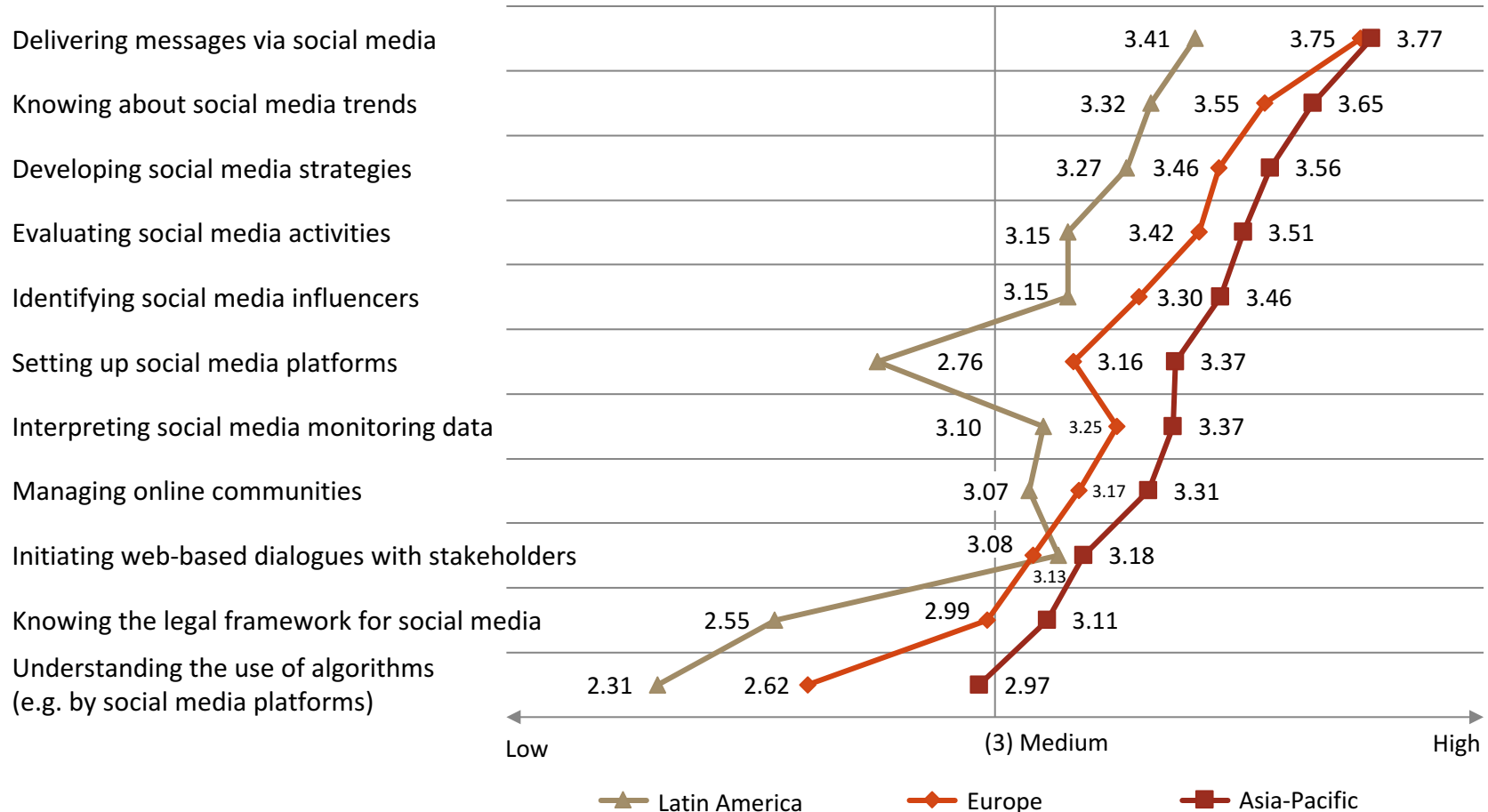ificant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05). ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01)

Compared to 2015, communication professionals have improved most social media capabilities – especially evaluation, dialogue and messaging skills

Capability	2017	2015	Change
Delivering messages via social media	66.7%	61.2%	+5.5
Knowing about social media trends	60.6%	61.2%	-0.6
Developing social media strategies	55.1%	50.5%	+4.6
Evaluating social media activities	54.0%	44.8%	+9.2
Setting up social media platforms	47.6%	46.5%	+1.1
Interpreting social media monitoring data	47.4%	45.2%	+2.2
Managing online communities	44.0%	44.5%	-0.5
Initiating web-based dialogues with stakeholders	39.0%	31.8%	+7.2
Knowing the legal framework for social media	37.4%	33.1%	+4.3

■ 2017
■ 2015

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals; Macnamara et al. 2015 / n = 1,200 communication professionals. Q 5: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Percentages: Frequencies based on scale points 4-5.

Global comparison: Asia-Pacific communicators rate their social media skills higher than professionals in other parts of the world

	Latin America	Europe	Asia-Pacific
Delivering messages via social media	3.41	3.75	3.77
Knowing about social media trends	3.32	3.55	3.65
Developing social media strategies	3.27	3.46	3.56
Evaluating social media activities	3.15	3.42	3.51
Identifying social media influencers	3.15	3.30	3.46
Setting up social media platforms	2.76	3.16	3.37
Interpreting social media monitoring data	3.10	3.25	3.37
Managing online communities	3.07	3.17	3.31
Initiating web-based dialogues with stakeholders	3.13	3.08	3.18
Knowing the legal framework for social media	2.55	2.99	3.11
Understanding the use of algorithms (e.g. by social media platforms)	2.31	2.62	2.97

Low   (3) Medium   High

Latin America   Europe   Asia-Pacific

Management skills and development of capabilities

Chapter overview

Another field of interest for the study are skills and capabilities of communication practitioners in Asia-Pacific. Management literature shows that, while knowledge, skills, attributes (KSAs) and sets of competencies are required to perform various roles, broader capabilities are increasingly required to adapt to change (Lester, 2014, 2017). However, competency and capability development in communication is still in its infancy in most organisations and research in the field has just begun (Tench & Moreno, 2015; Kiesenbauer, 2018).

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.

Capabilities vary by levels of seniority and experience, as could be expected. Heads of communication in organisations and CEOs of agencies rated themselves more highly on all aspects of work including planning, leading, strategy, and management of human resources and finances. Unit leaders also rated themselves moderately high in management skills. In line with their level of experience, team members rated themselves lowest in capabilities and, therefore, most in need of professional development.
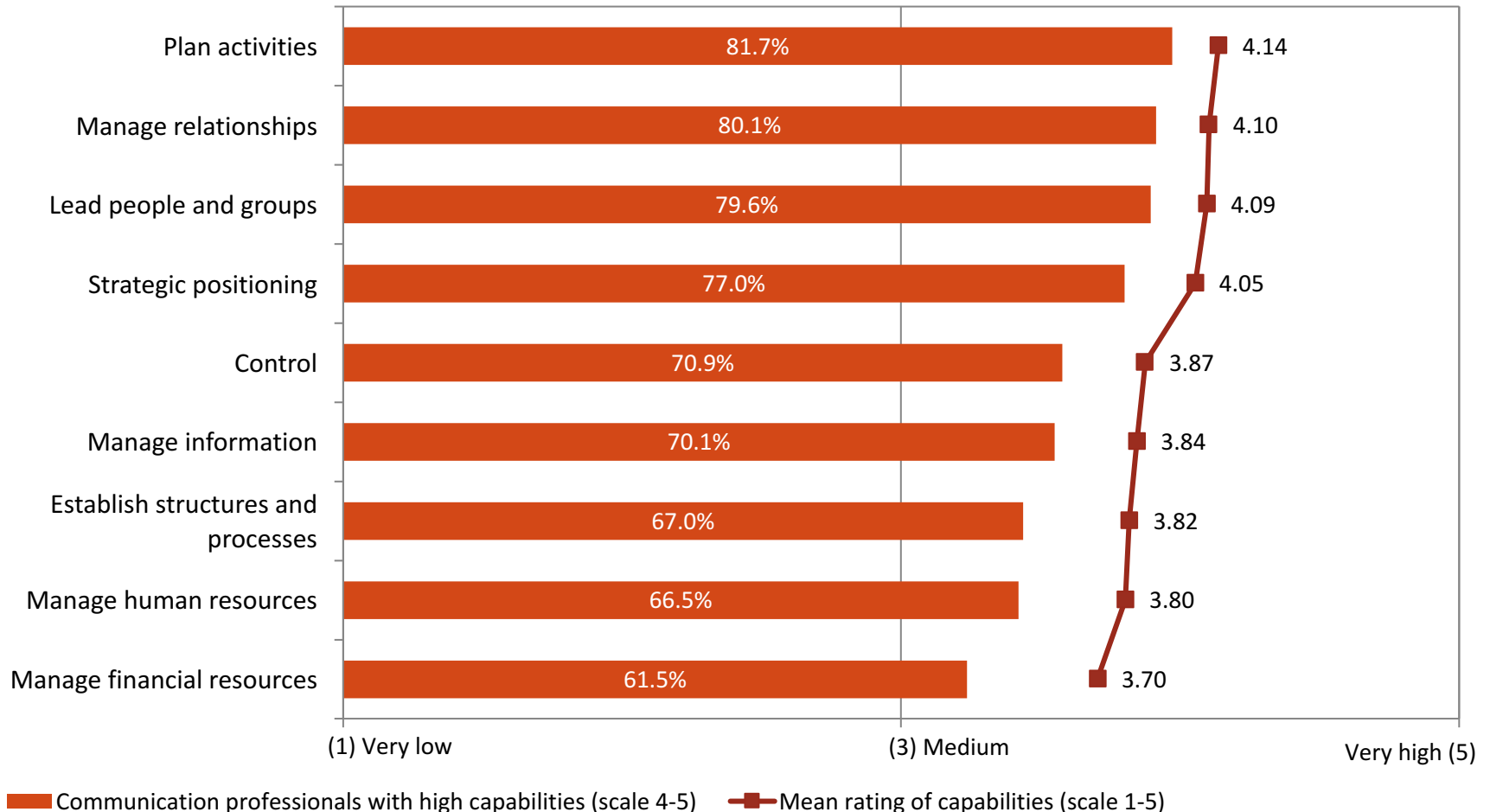
Practitioners in Indonesia, Australia, Hong Kong, New Zealand and India are particularly confident of their management capabilities. On a global scale, Asia-Pacific and European communicators assess their management capabilities generally higher than their peers in Latin America. In fact, Asia Pacific practitioners rate themselves more positively than European practitioners in a number of areas including managing relationships, leading people, establishing structures and processes, and managing finances. This possibly reflects cultural differences rather than empirical evidence.

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. Also female professionals have a significantly stronger desire to strengthen their business and management knowledge than men.
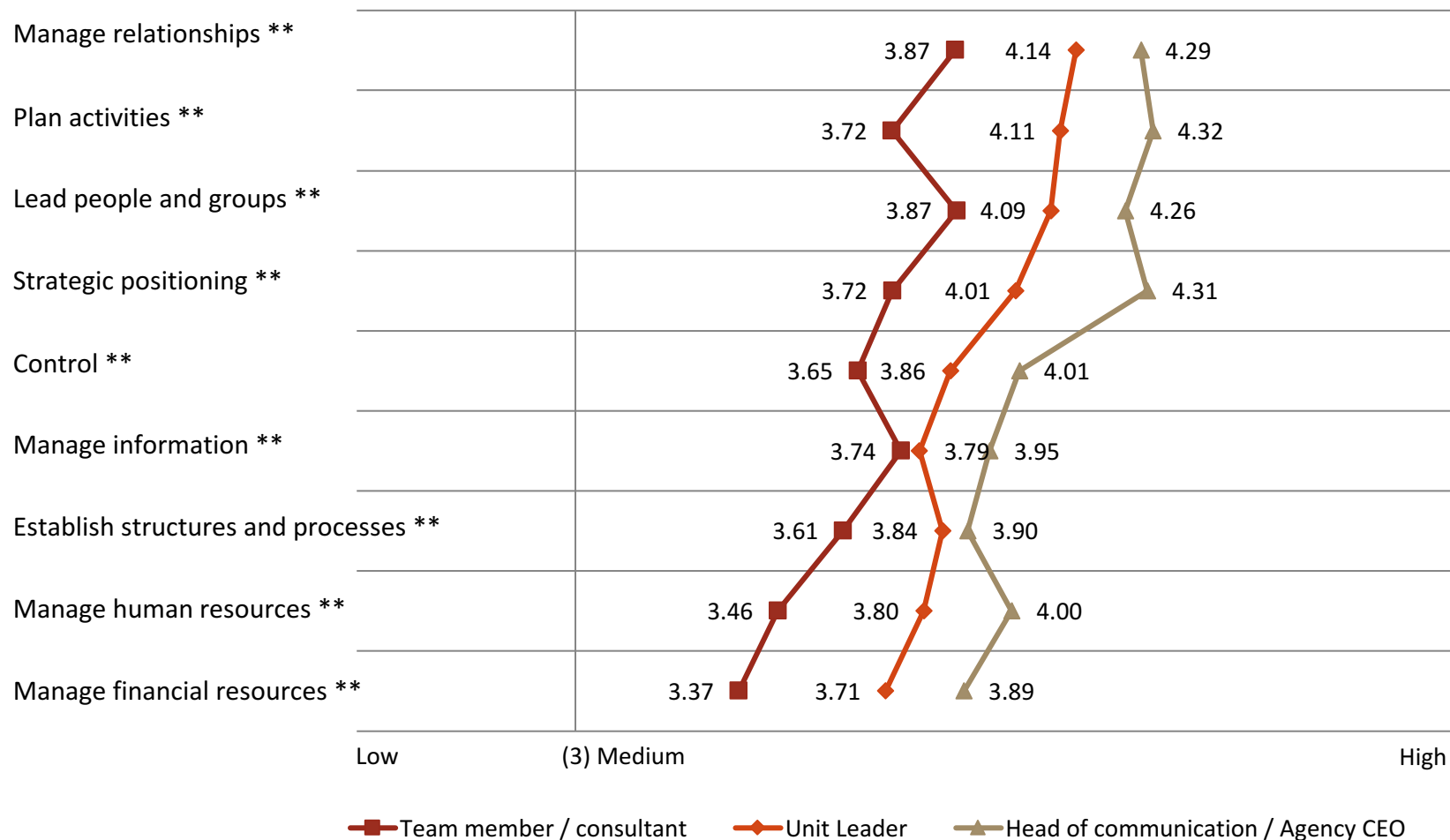
A majority of practitioners in Japan and China and nearly as many participants in Indonesia and Vietnam reported a need to improve their communication knowledge and skills, with those in most other countries rating this a low priority. For example, only 6.2 per cent of practitioners in Australia, 14 per cent of New Zealand communication professionals, and 15.4 per cent of those in India see increasing communication skills as a priority.

A key finding in relation to skills and capabilities is that the availability of professional development does not align with key areas of need. For example, while technical knowledge is rated a high priority by most practitioners across the region, only 4 per cent of practitioners in New Zealand, 9.3 per cent in Malaysia, 11.6 per cent in Australia, 12.9 per cent in Hong Kong, 14.1 per cent in India, and 14.9 per cent in Japan reported that such training is available in their organisation.

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

Capability	Communication professionals with high capabilities (scale 4-5)	Mean rating of capabilities (scale 1-5)
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 with high capabilities (scale 4-5) ■— Mean rating of capabilities (scale 1-5)

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 1,264 communication professionals from 22 countries. Q 6: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Percentages: Frequency based on scale points 4-5. Mean values.

50

Significant different management capabilities across ranks and hierarchies

	Team member / consultant	Unit Leader	Head of communication / Agency CEO
Manage relationships **	3.87	4.14	4.29
Plan activities **	3.72	4.11	4.32
Lead people and groups **	3.87	4.09	4.26
Strategic positioning **	3.72	4.01	4.31
Control **	3.65 / 3.86		4.01
Manage information **	3.74	3.79	3.95
Establish structures and processes **	3.61 / 3.84		3.90
Manage human resources **	3.46	3.80	4.00
Manage financial resources **	3.37	3.71	3.89

Low   (3) Medium   High

Team member / consultant   Unit Leader   Head of communication / Agency CEO

Country-by-country comparison of management capabilities

	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Plan activities *	4.34	4.17	4.23	4.22	4.42	3.79	3.90	4.38	4.12	4.10	4.12	3.92	3.94
Manage relationships **	4.39	3.98	4.19	4.21	4.28	4.03	4.00	4.23	4.06	4.08	3.90	3.80	3.96
Lead people and groups	4.18	4.01	4.09	4.29	4.33	3.80	3.99	4.15	4.12	4.15	4.02	3.92	3.98
Strategic positioning **	4.36	4.12	4.16	4.08	4.29	3.85	3.70	4.17	3.94	4.16	4.10	3.75	3.79
Control **	3.85	3.89	3.79	4.06	4.28	3.41	3.89	3.71	3.94	3.86	3.92	3.75	3.82
Manage information *	3.89	4.00	3.80	3.87	4.20	3.60	3.55	3.81	3.88	3.83	4.02	3.75	3.78
Establish structures and processes	3.77	4.03	3.73	3.96	4.13	3.60	3.73	3.75	3.79	3.94	3.90	3.61	3.65
Manage human resources	3.92	3.79	3.79	3.94	4.07	3.60	3.64	3.92	3.84	3.76	3.68	3.52	3.84
Manage financial resources	3.78	3.71	3.67	3.85	4.01	3.36	3.53	3.79	3.71	3.81	3.56	3.45	3.68
Overall management capabilities (average score)	**4.07**	**3.97**	**3.93**	**4.07**	**4.23**	**3.67**	**3.78**	**3.98**	**3.93**	**3.96**	**3.91**	**3.72**	**3.81**

Global comparison: Asia-Pacific and European communicators assess their management capabilities generally higher than their peers in Latin America
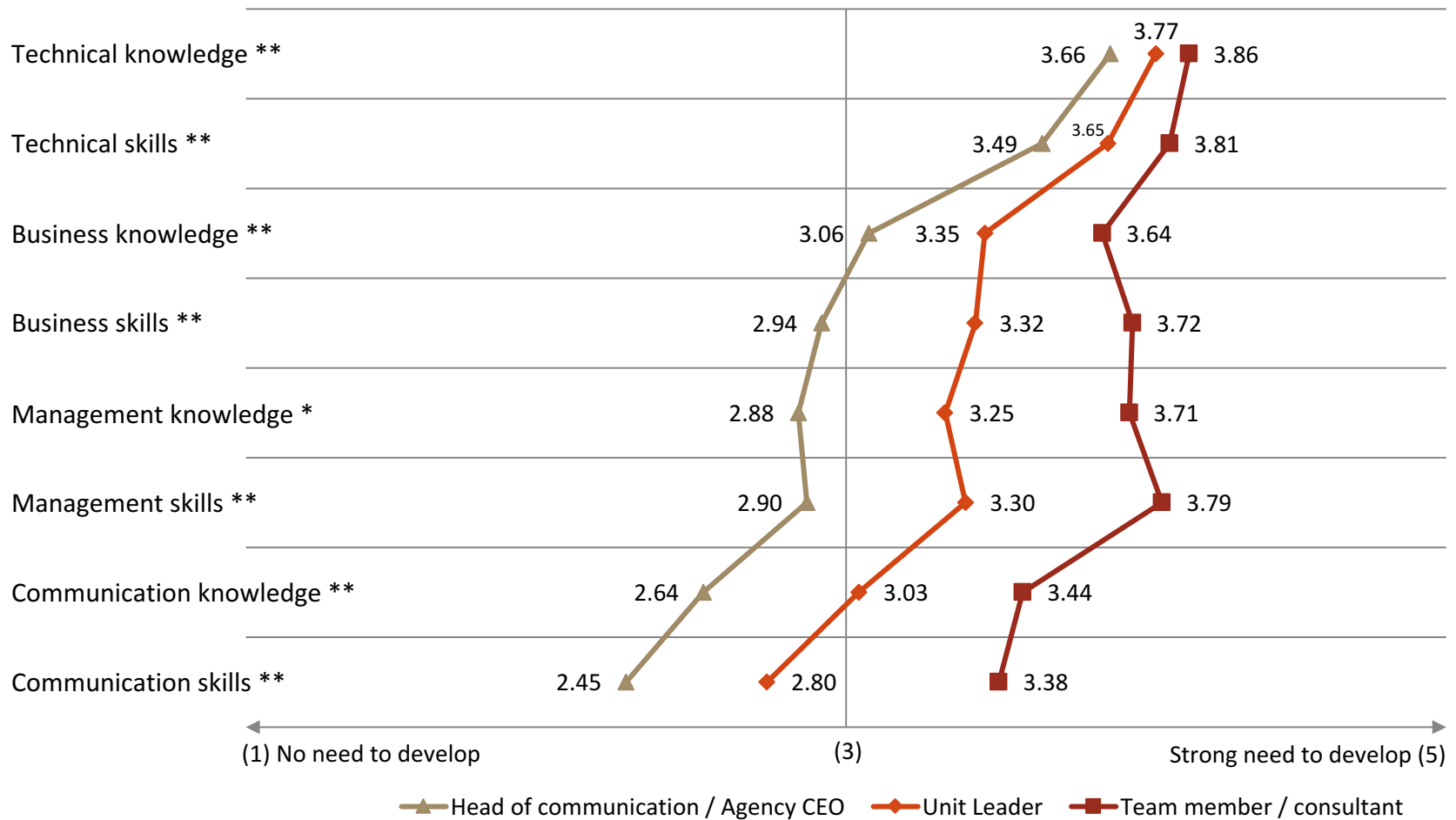

	Latin America	Europe	Asia-Pacific
Plan activities	3.46	4.14	4.16
Manage relationships	3.85	4.01	4.10
Lead people and groups	4.00	3.98	4.09
Strategic positioning	3.97	4.05	4.09
Control	3.64	3.60	3.87
Manage information	3.65	3.83	3.84
Establish structures and processes	3.61	3.60	3.82
Manage human resources	3.33	3.64	3.80
Manage financial resources	3.19	3.46	3.70

Low   (3) Medium   High

— Latin America   — Europe   — Asia-Pacific

Development needs and training offered: communicators feel they mostly need to improve technical skills and knowledge, but support is often missing
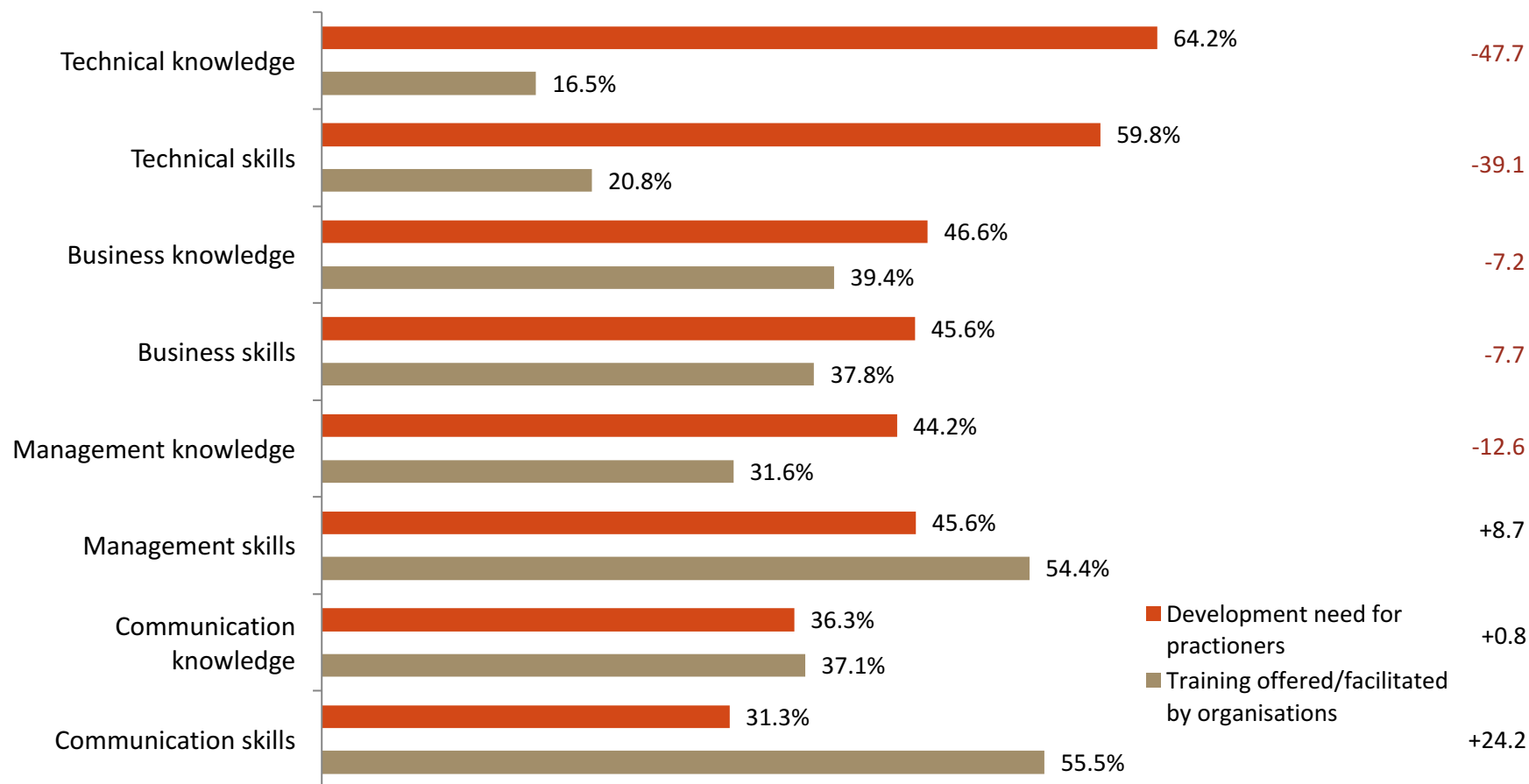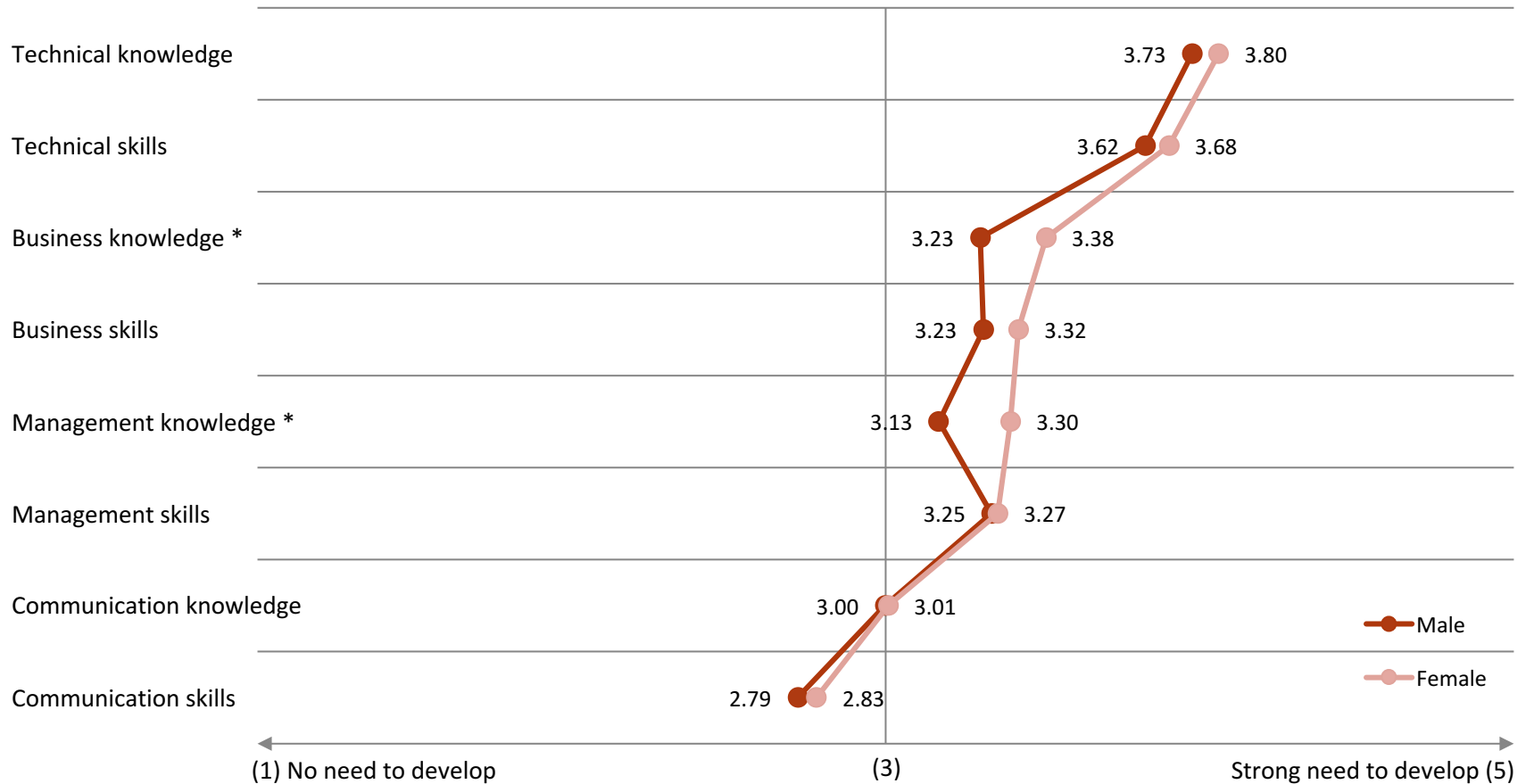
Category	Development need for practioners	Training offered/facilitated by organisations	Difference
Technical knowledge	64.2%	16.5%	-47.7
Technical skills	59.8%	20.8%	-39.1
Business knowledge	46.6%	39.4%	-7.2
Business skills	45.6%	37.8%	-7.7
Management knowledge	44.2%	31.6%	-12.6
Management skills	45.6%	54.4%	+8.7
Communication knowledge	36.3%	37.1%	+0.8
Communication skills	31.3%	55.5%	+24.2

■ Development need for practioners
■ Training offered/facilitated by organisations

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals from 22 countries. Q 7: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? Scale 1 (No need to develop) – 5 (Strong need to develop). Percentages: Frequency based on scale points 4-5. Q 7 (continued): Does your organisation already offer training programmes in these fields? Percentages: Frequency based on selection of item.

Communicators of all ranks believe that their technical capabilities and business knowledge need to be improved

Technical knowledge **
3.66 3.77 3.86

Technical skills **
3.49 3.65 3.81

Business knowledge **
3.06 3.35 3.64

Business skills **
2.94 3.32 3.72

Management knowledge *
2.88 3.25 3.71

Management skills **
2.90 3.30 3.79

Communication knowledge **
2.64 3.03 3.44

Communication skills **
2.45 2.80 3.38

(1) No need to develop   (3)   Strong need to develop (5)

Head of communication / Agency CEO   Unit Leader   Team member / consultant

Women working as communicators have a significant stronger desire to strengthen their business and management knowledge than men

	Male	Female
Technical knowledge	3.73	3.80
Technical skills	3.62	3.68
Business knowledge *	3.23	3.38
Business skills	3.23	3.32
Management knowledge *	3.13	3.30
Management skills	3.25	3.27
Communication knowledge	3.00	3.01
Communication skills	2.79	2.83

(1) No need to develop   (3)   Strong need to develop (5)

Development needs reported by communication professionals in key countries across Asia-Pacific

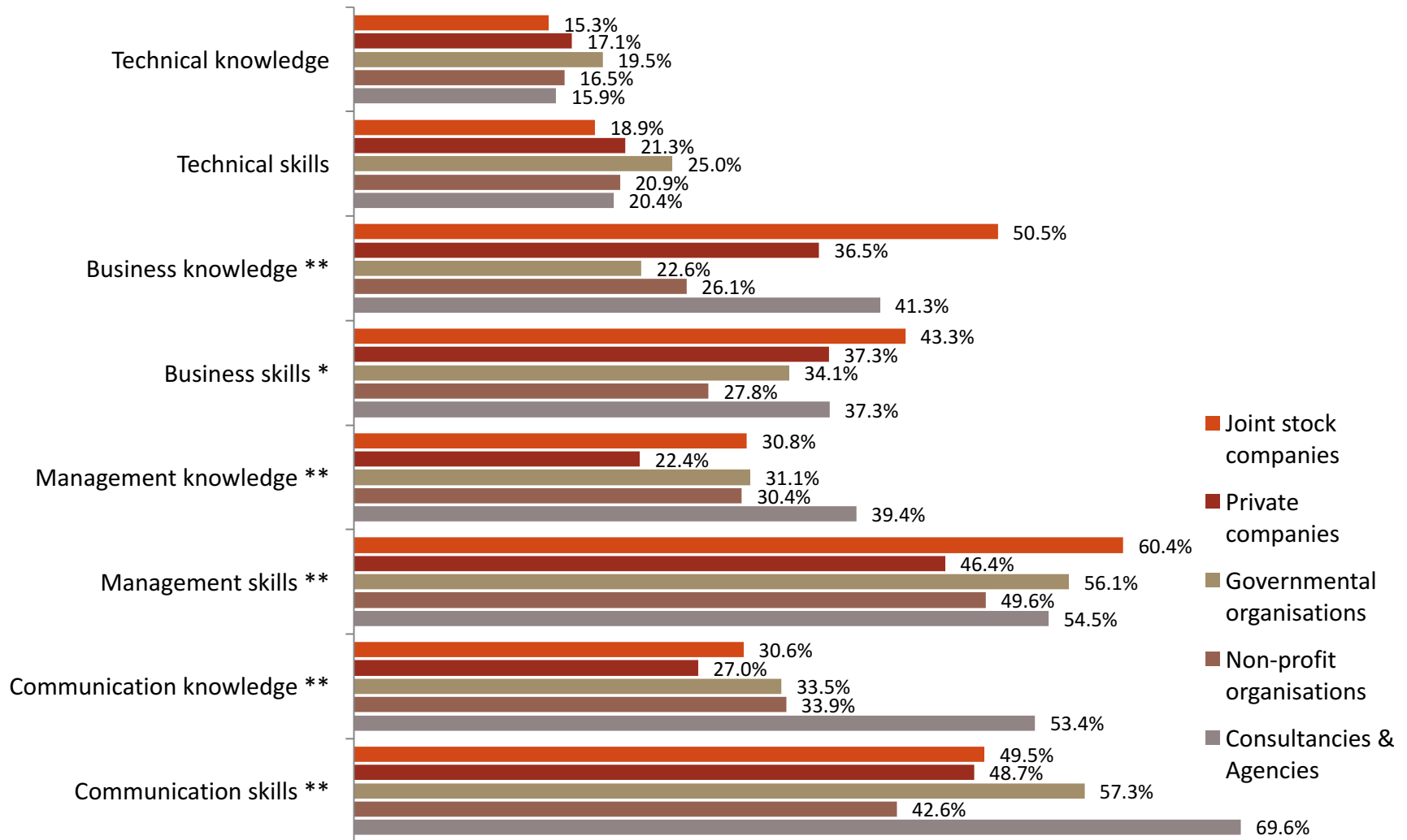|	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Technical knowledge	67.8%	62.3%	62.9%	61.1%	72.2%	48.6%	68.0%	50.0%	73.2%	66.7%	62.3%	74.5%	61.6%
Technical skills	61.0%	61.5%	53.2%	59.7%	70.8%	44.6%	73.3%	42.0%	77.5%	54.5%	69.8%	70.6%	50.5%
Business knowledge	24.0%	59.8%	37.9%	37.6%	56.9%	45.9%	53.3%	30.0%	54.9%	39.8%	58.5%	60.8%	65.7%
Business skills	30.8%	55.7%	34.7%	41.6%	62.5%	41.9%	53.3%	28.0%	57.7%	32.5%	54.7%	55.9%	60.6%
Management knowledge	22.6%	61.5%	44.4%	30.9%	58.3%	54.1%	37.3%	26.0%	33.8%	37.4%	64.2%	57.8%	64.6%
Management skills	28.8%	59.8%	37.9%	32.2%	54.2%	59.5%	38.7%	28.0%	36.6%	45.5%	58.5%	56.9%	68.7%
Communication knowledge **	13.7%	57.4%	24.2%	21.5%	51.4%	63.5%	37.3%	12.0%	39.4%	27.6%	45.3%	47.1%	54.5%
Communication skills **	6.2%	51.6%	23.4%	15.4%	45.8%	52.7%	33.3%	14.0%	29.6%	22.0%	45.3%	46.1%	47.5%

Training for communicators offered by organisations in the region

	Australia	China	Hong Kong	India	Indo-nesia	Japan	Malaysia	New Zealand	Philip-pines	Singa-pore	Taiwan	Thailand	Vietnam
Technical knowledge **	11.6%	29.5%	12.9%	14.1%	16.7%	14.9%	9.3%	4.0%	22.5%	13.8%	28.3%	18.6%	20.2%
Technical skills **	16.4%	27.9%	16.1%	20.1%	20.8%	17.6%	14.7%	12.0%	38.0%	16.3%	32.1%	20.6%	24.2%
Business knowledge **	26.0%	45.9%	50.8%	51.0%	41.7%	43.2%	29.3%	24.0%	28.2%	35.0%	43.4%	35.3%	40.4%
Business skills **	34.9%	49.2%	37.1%	47.0%	34.7%	29.7%	24.0%	42.0%	52.1%	37.4%	39.6%	28.4%	31.3%
Management knowledge **	17.8%	38.5%	26.6%	41.6%	38.9%	32.4%	29.3%	30.0%	42.3%	22.8%	37.7%	21.6%	38.4%
Management skills **	55.5%	45.1%	56.5%	61.1%	51.4%	45.9%	56.0%	70.0%	63.4%	57.7%	39.6%	45.1%	58.6%
Communication knowledge **	18.5%	42.6%	31.5%	38.3%	56.9%	35.1%	37.3%	22.0%	46.5%	33.3%	50.9%	30.4%	53.5%
Communication skills **	42.5%	54.1%	50.0%	58.4%	66.7%	55.4%	61.3%	48.0%	74.6%	55.3%	60.4%	47.1%	65.7%

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,260 communication professionals from 13 countries. Q 7: Does your organisation already offer training programmes in these fields? Percentages: Frequency based on selection of item. ** Highly significant differences (chi-square test, p ≤ 0.01).

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Personnel development opportunities differ significantly across organisations

Training offered/facilitated by organisations for …

Technical knowledge	15.3% / 17.1% / 19.5% / 16.5% / 15.9%
Technical skills	18.9% / 21.3% / 25.0% / 20.9% / 20.4%
Business knowledge **	50.5% / 36.5% / 22.6% / 26.1% / 41.3%
Business skills *	43.3% / 37.3% / 34.1% / 27.8% / 37.3%
Management knowledge **	30.8% / 22.4% / 31.1% / 30.4% / 39.4%
Management skills **	60.4% / 46.4% / 56.1% / 49.6% / 54.5%
Communication knowledge **	30.6% / 27.0% / 33.5% / 33.9% / 53.4%
Communication skills **	49.5% / 48.7% / 57.3% / 42.6% / 69.6%

Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations
- Consultancies & Agencies

Communication tasks and practices

Chapter overview

Strategic communication embraces a variety of overlapping roles and tasks, which are combined in the daily work of practitioners. Previous research has identified different clusters, ranging from operational communication activities (messaging) and managing communication processes to more advanced tasks like coaching and enabling others to communicate, as well as supporting organisational change by listening to stakeholder expectations (Van Ruler & Verčič, 2005; Mazzei, 2014; Macnamara, 2016; Zerfass et al., 2016).

Data from the Asia-Pacific Communication Monitor 2017/18 reveal that operational activities dominate professional work in communication in the region, making up one-third (32.8 per cent) of all practices. This includes talking to journalists, writing media releases, producing communication materials, organising events, and so on. The second largest amount of work time is devoted to management activities such as planning, organising, leading staff, budgeting, evaluating processes and strategies, and justifying communication spending (28.3 per cent).

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. As could be expected, senior communication leaders spend more time on strategic activities than junior and middle-level practitioners. Nevertheless, even senior communication executives devote around a quarter of their work time on operational activities. This is common across all types of organisations.

When looking at the task profiles of typical jobs within communication, those working in media relations and acting as a spokesperson are mostly engaged in operational work. The same is true for practitioners producing online communication and working with social media. This continues to reflect the historical origins of public relations in press agentry and publicity (Grunig & Hunt, 1984) as well as findings of the 2015/16 Asia-Pacific Communication Monitor, which reported that 86.0 per cent of practitioners rely on counting the volume of publicity as their main method of evaluation (Macnamara et al., 2016, p. 56). Communication professionals specifically responsible for strategy and coordination, however, spend more than three quarters of their time for reflective work, coaching and managing.

Despite recent international focus on the strategic impact of communication on organisations (Holtzhausen & Zerfass, 2015; see also a forthcoming special issue of the International Journal of Strategic Communication, Vol. 13, 2018), current practices in Asia-Pacific continue to be media-centric and mostly operational and tactical. These trends are consistent across all countries in the region and are consistent globally with practitioners in Europe and Latin America. The variations shown in the data are not significant in relation to regional or global work practices. This indicates that, despite considerable progress, professional communicators in organisations still have way to go in playing a strategic role and influencing organisation policy and decisions.

How Asia-Pacific communicators spend their productive time at work

Aligning communication, the organisation/client and its stakeholders
Studying business and social research reports, identifying organisational goals, monitoring public issues and stakeholder expectations, debating visions and business strategies with top management and other departments, developing scenarios, building legitimacy

Operational communication
Talking to colleagues and journalists, writing press releases and print/online texts, producing communication media, monitoring results of our activities, organising events etc.

20.5%

32.8%

18.4%

28.3%
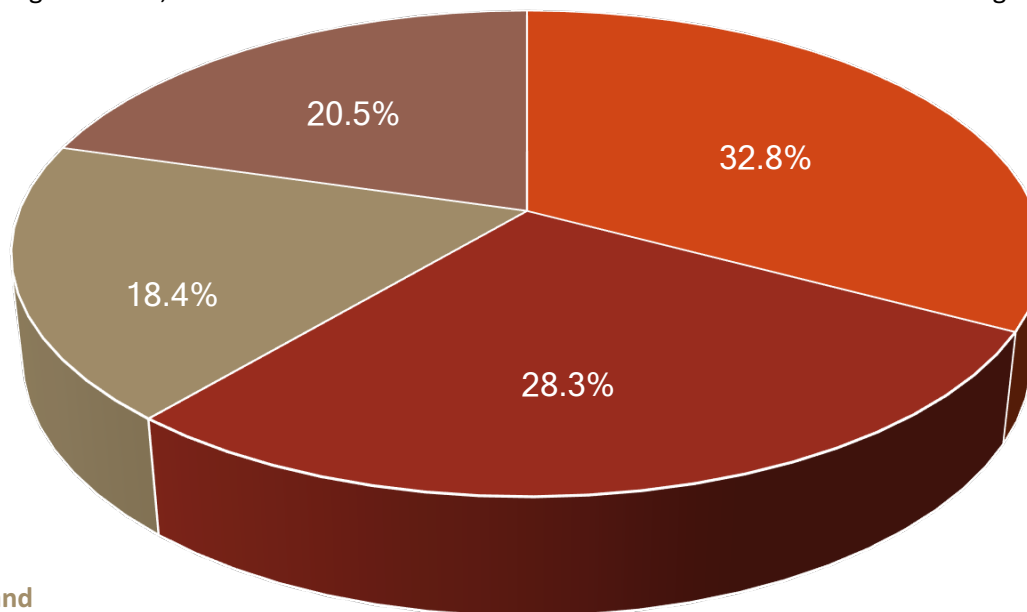
Coaching, training, consulting and enabling members of the organisation or clients
On the vision, mission and other communication related issues as well as upgrading their communicative competence, preparing them for communicating with the media, stakeholders etc.
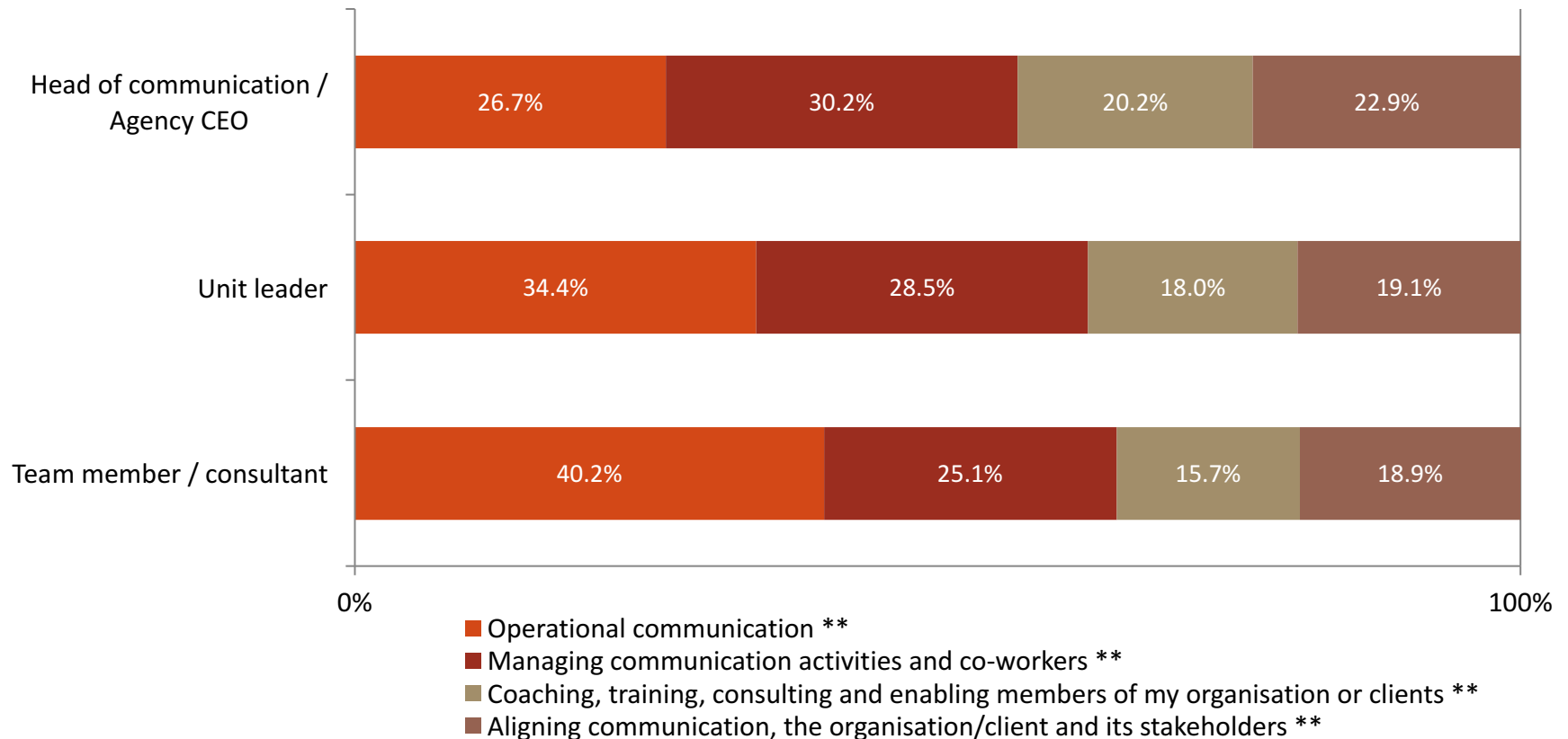
Managing communication activities and co-workers
Planning, organising, leading staff, budgeting, evaluating processes and strategies, justifying communication spending, preparing for crises

Communication leaders focus to a greater extent on strategic and reflective activities, but operational communication still takes one quarter of their time
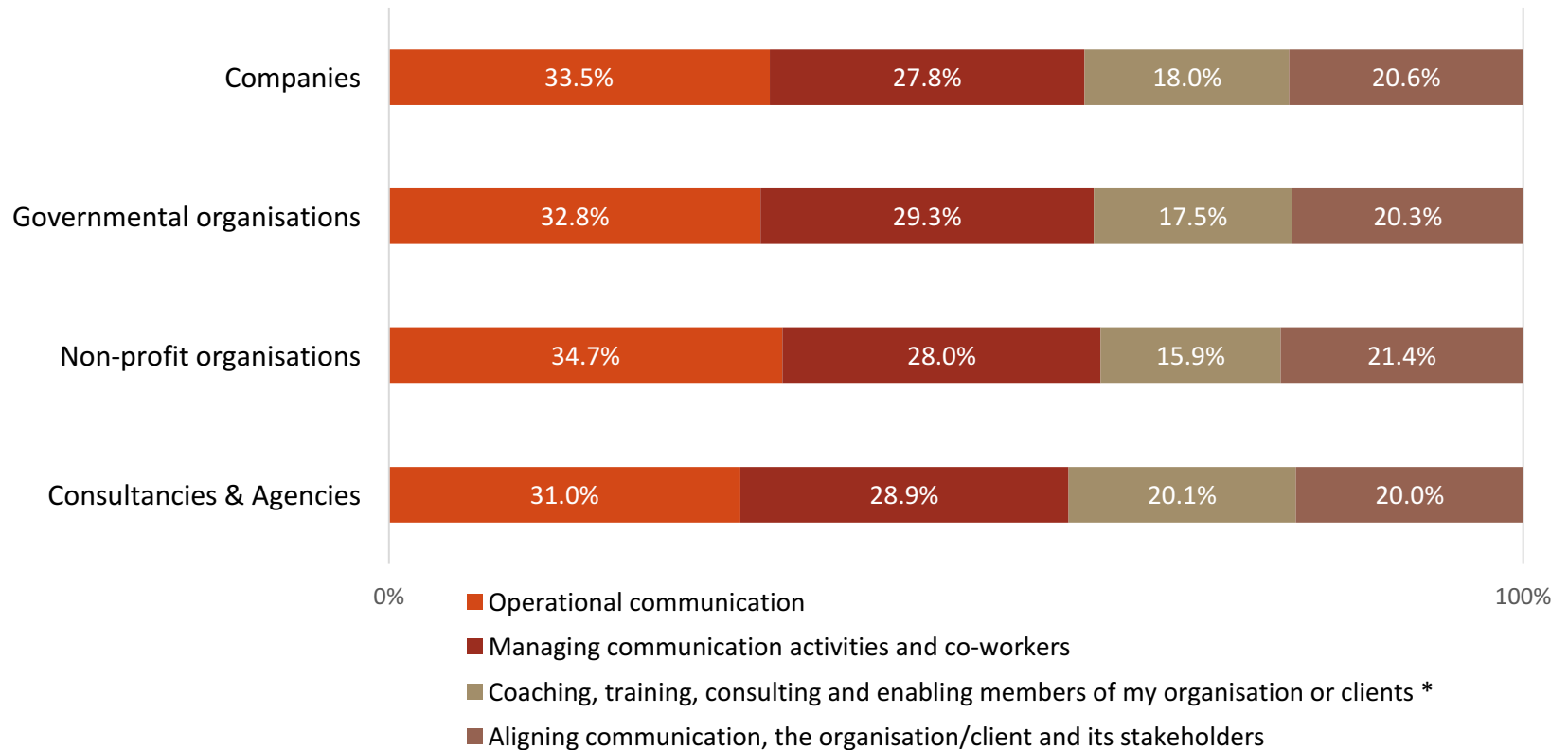
Productive time spent at work

	Operational communication **	Managing communication activities and co-workers **	Coaching, training, consulting and enabling members of my organisation or clients **	Aligning communication, the organisation/client and its stakeholders **
Head of communication / Agency CEO	26.7%	30.2%	20.2%	22.9%
Unit leader	34.4%	28.5%	18.0%	19.1%
Team member / consultant	40.2%	25.1%	15.7%	18.9%

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

There are hardly any differences in how communicators in various organisations spend their productive time at work

Productive time spent at work
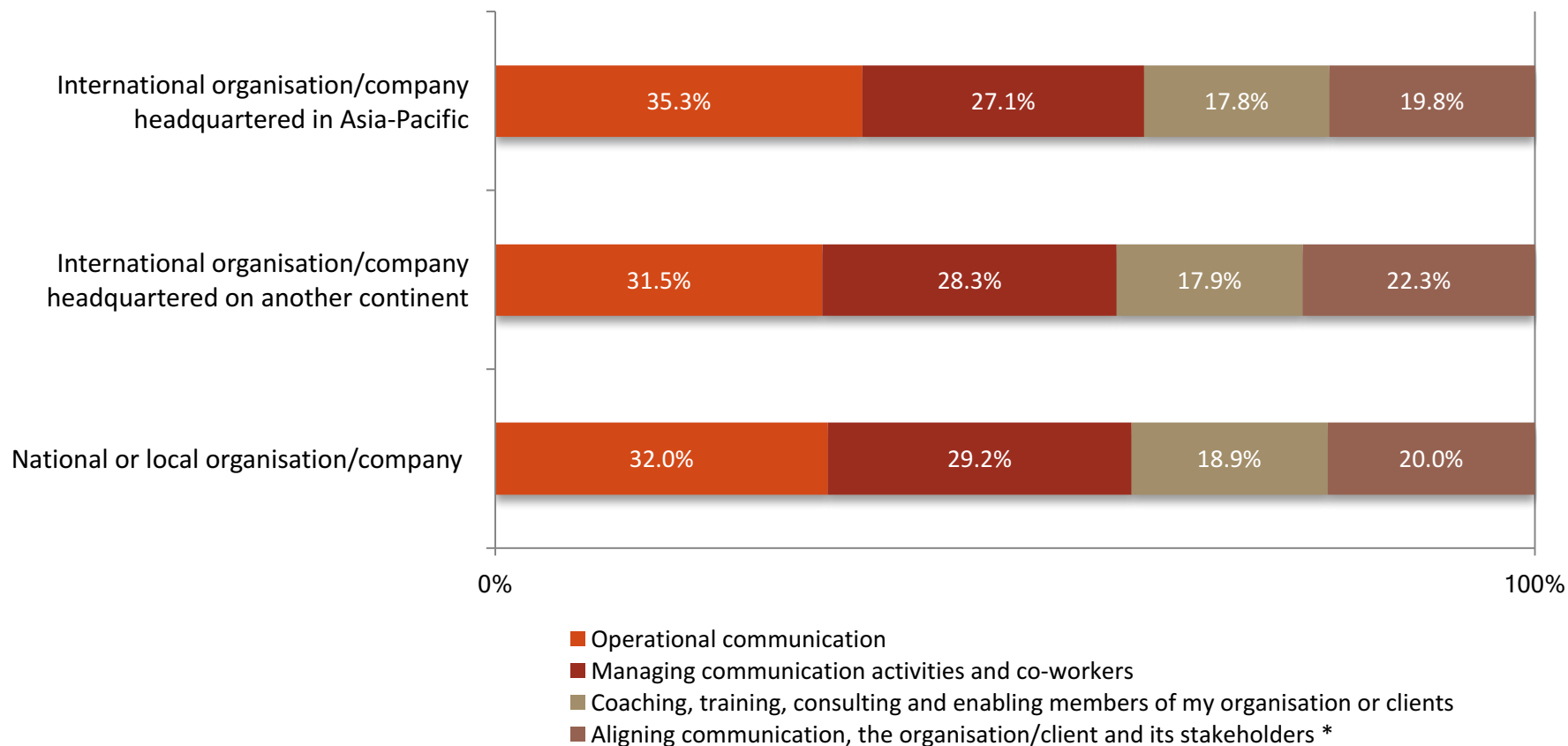
Organisation	Operational communication	Managing communication activities and co-workers	Coaching, training, consulting and enabling members of my organisation or clients *	Aligning communication, the organisation/client and its stakeholders
Companies	33.5%	27.8%	18.0%	20.6%
Governmental organisations	32.8%	29.3%	17.5%	20.3%
Non-profit organisations	34.7%	28.0%	15.9%	21.4%
Consultancies & Agencies	31.0%	28.9%	20.1%	20.0%

0%   100%

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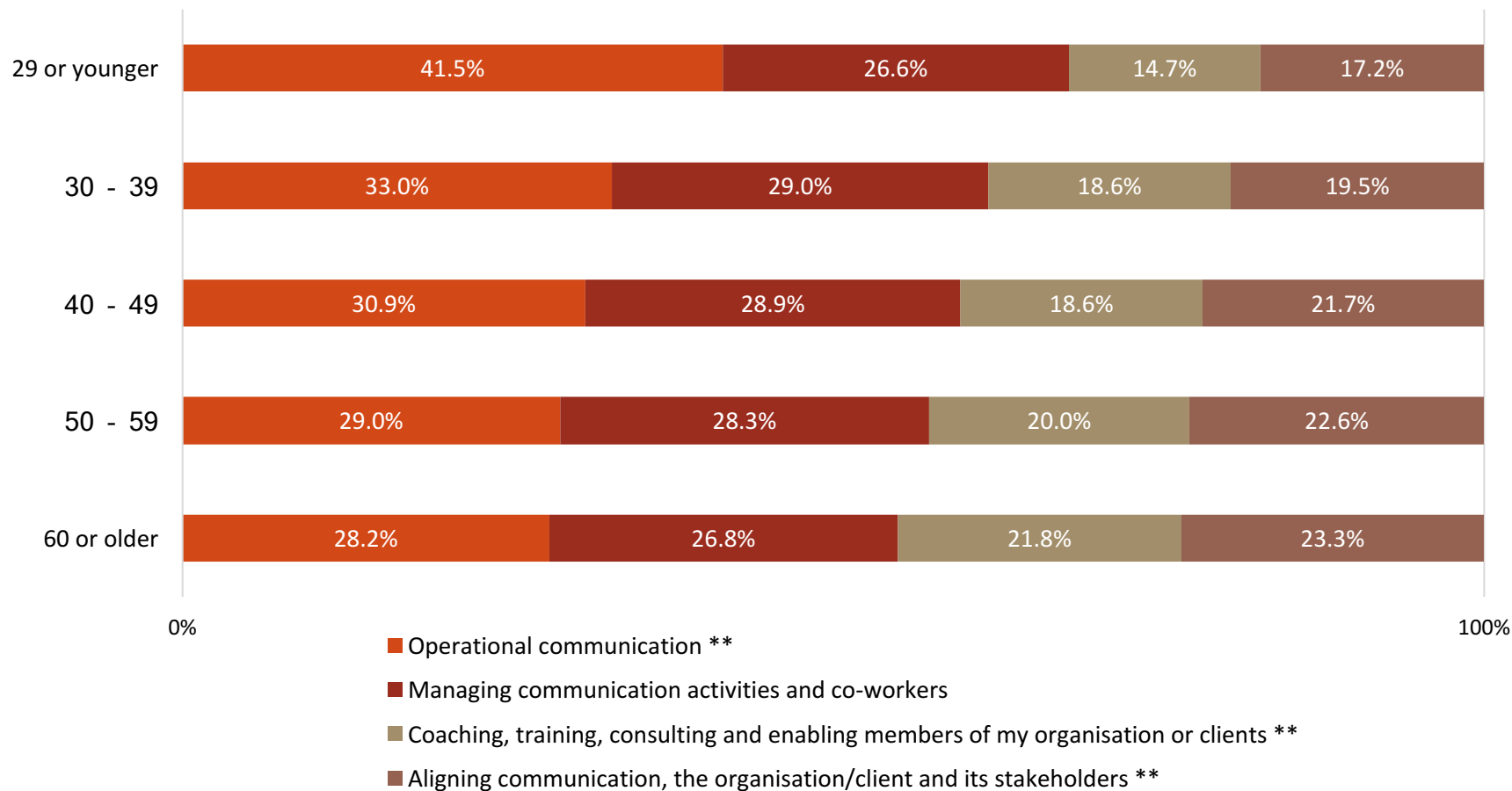■ Aligning communication, the organisation/client and its stakeholders

Time spent on various activities depending on the regional focus of organisations

Productive time spent at work

	Operational communication	Managing communication activities and co-workers	Coaching, training, consulting and enabling members of my organisation or clients	Aligning communication, the organisation/client and its stakeholders *
International organisation/company headquartered in Asia-Pacific	35.3%	27.1%	17.8%	19.8%
International organisation/company headquartered on another continent	31.5%	28.3%	17.9%	22.3%
National or local organisation/company	32.0%	29.2%	18.9%	20.0%

0% — 100%

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

65

Activity profiles of practitioners are significantly correlated to their age

Productive time spent at work

Age	Operational communication **	Managing communication activities and co-workers	Coaching, training, consulting and enabling members of my organisation or clients **	Aligning communication, the organisation/client and its stakeholders **
29 or younger	41.5%	26.6%	14.7%	17.2%
30 - 39	33.0%	29.0%	18.6%	19.5%
40 - 49	30.9%	28.9%	18.6%	21.7%
50 - 59	29.0%	28.3%	20.0%	22.6%
60 or older	28.2%	26.8%	21.8%	23.3%

■ Operational communication **

■ Managing communication activities and co-workers

■ Coaching, training, consulting and enabling members of my organisation or clients **

■ Aligning communication, the organisation/client and its stakeholders **
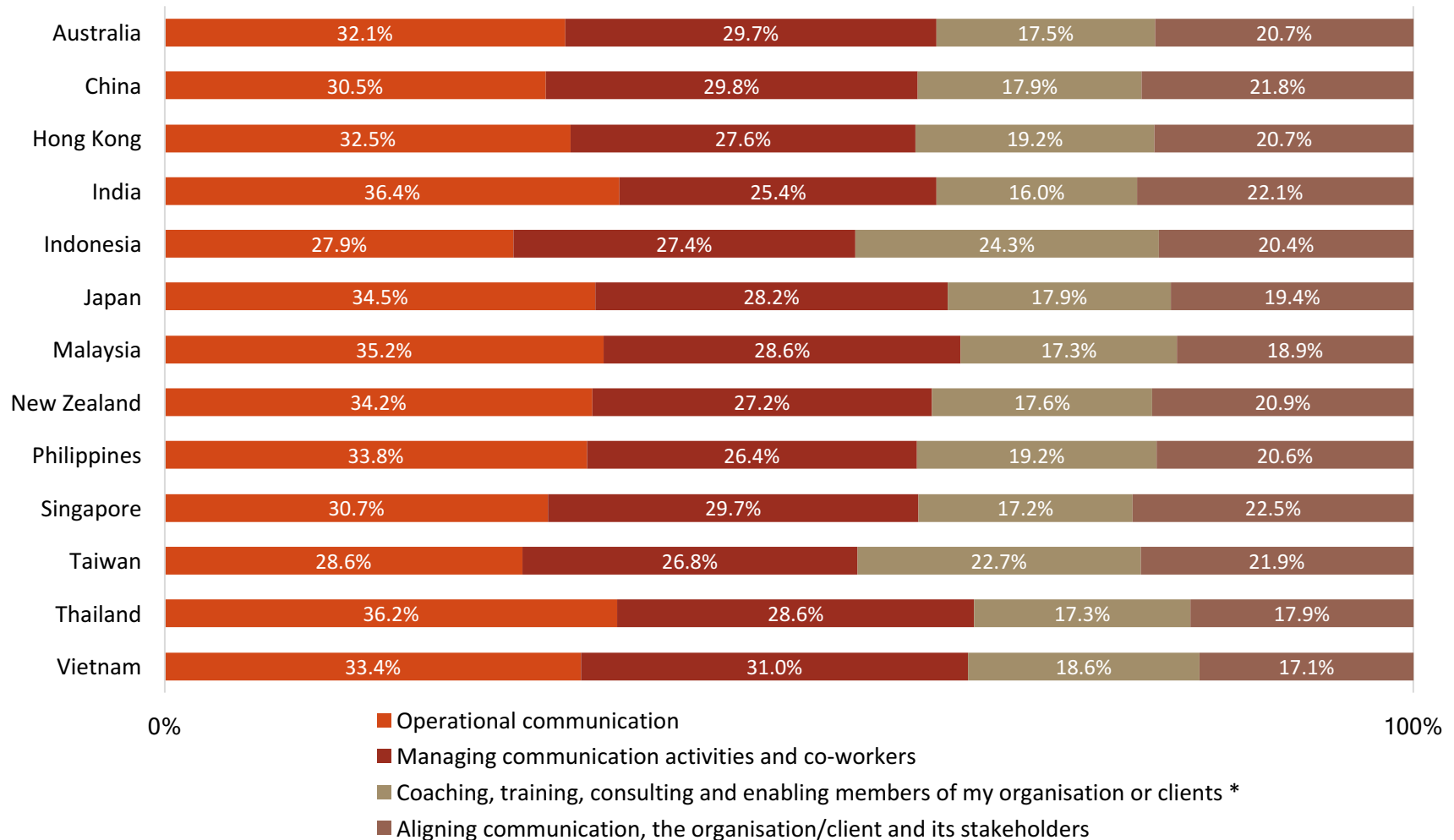
Working in media relations and online is strongly hands-on and operational

Productive time spent at work by communication professionals working in the field of…

Field	Operational communication **	Managing communication activities and co-workers *	Coaching, training, consulting and enabling members of my organisation or clients **	Aligning communication, the organisation/client and its stakeholders **
Strategy and coordination	23.9%	30.4%	20.8%	24.9%
Consultancy, advising, coaching, key account	27.8%	28.6%	22.5%	21.2%
Marketing, brand, consumer communication	29.8%	29.8%	19.5%	20.9%
Overall communication	34.5%	28.5%	17.2%	19.8%
Online communication, social media	35.9%	28.3%	16.2%	19.7%
Media relations, press spokesperson	40.6%	27.1%	15.5%	16.8%

0%   100%

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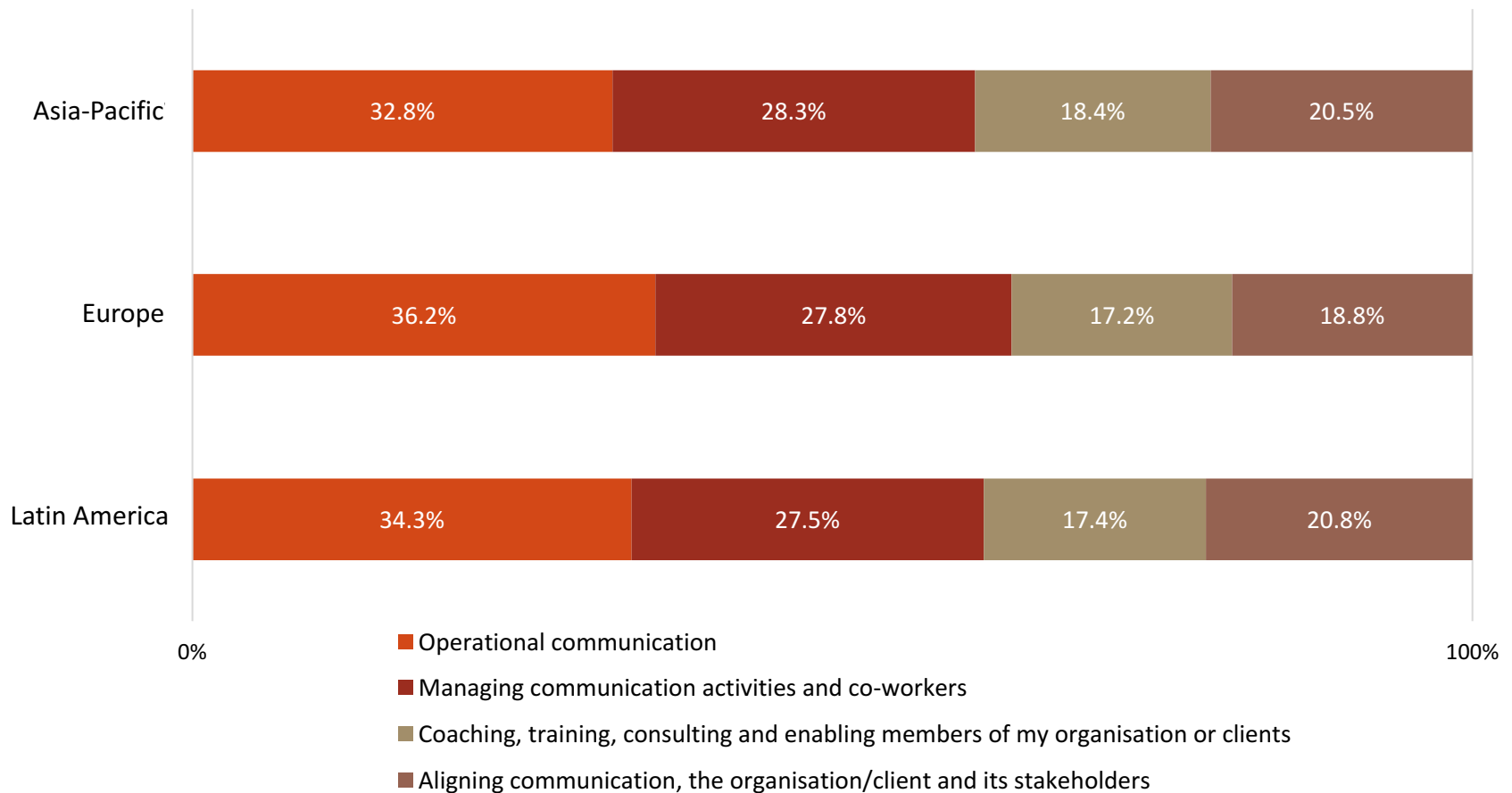■ Aligning communication, the organisation/client and its stakeholders **

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 158 communication professionals from 22 countries. Q 8: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with … Figure displays median for each item; values have been rounded based on mean values. ** Highly significant differences (independent samples T-test, p ≤ 0.01). * Significant differences (independent samples T-test, p ≤ 0.05).

Communication practices and tasks in key countries across Asia-Pacific

Country	Operational communication	Managing communication activities and co-workers	Coaching, training, consulting and enabling members of my organisation or clients *	Aligning communication, the organisation/client and its stakeholders
Australia	32.1%	29.7%	17.5%	20.7%
China	30.5%	29.8%	17.9%	21.8%
Hong Kong	32.5%	27.6%	19.2%	20.7%
India	36.4%	25.4%	16.0%	22.1%
Indonesia	27.9%	27.4%	24.3%	20.4%
Japan	34.5%	28.2%	17.9%	19.4%
Malaysia	35.2%	28.6%	17.3%	18.9%
New Zealand	34.2%	27.2%	17.6%	20.9%
Philippines	33.8%	26.4%	19.2%	20.6%
Singapore	30.7%	29.7%	17.2%	22.5%
Taiwan	28.6%	26.8%	22.7%	21.9%
Thailand	36.2%	28.6%	17.3%	17.9%
Vietnam	33.4%	31.0%	18.6%	17.1%

0%   100%

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

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,260 communication professionals from 13 countries. Q 8: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with … Figure displays median for each item; values have been rounded based on mean values. * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$).

Global comparison: Communicators across the world spend a similar amount of time on key activities

	Operational communication	Managing communication activities and co-workers	Coaching, training, consulting and enabling members of my organisation or clients	Aligning communication, the organisation/client and its stakeholders
Asia-Pacific	32.8%	28.3%	18.4%	20.5%
Europe	36.2%	27.8%	17.2%	18.8%
Latin America	34.3%	27.5%	17.4%	20.8%

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

Global Communication Monitor 2017 data based on surveying n = 4,928 communication professionals in 82 countries / Zerfass et al. 2016 / n = 2,710 professionals in Europe; Macnamara et al. 2017 / n = 1,306 professionals in Asia-Pacific; Moreno et al. 2017 / n = 912 professionals in Latin America. Q 7/8/7: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with … Figure displays median for each item; values have been rounded based on mean values.

Job satisfaction

Chapter overview

An important driver of individual and organisational performance is employee satisfaction (Judge et al., 2001). Therefore, a concern is that job satisfaction of communication professionals in the region declined in 2017 compared with findings of the previous 2015/16 Asia-Pacific Communication Monitor. In 2015/16, 65.5 per cent of communication professionals reported that they were overall satisfied with their jobs, with 22.8 per cent neutral and only 11.7 per cent dissatisfied (Lwin & Zerfass, 2016). However, the 2017/18 study found that only 56.6 per cent are satisfied and 'neutral' ratings rose to 30.9 per cent.

The Philippines, Indonesia, Vietnam and Taiwan reported higher levels of satisfaction in comparison with other countries. Communication professionals in India, Singapore and Hong Kong are the least satisfied with their jobs. India, the Philippines, Australia and Japan reported the sharpest decreases in overall job satisfaction since the 2015/16 study with falls ranging from 19.2 to 14.7 per cent.

While most communication professionals enjoy interesting tasks (72.7 per cent) and recognition from their superiors or clients (62.1 per cent), only one third find their salary adequate. Since 2015/16, satisfaction with the status of working in strategic communication in Asia-Pacific has slightly increased. But all other dimensions of job satisfaction have declined, especially the perceived appropriateness of salaries (down 12.3 per cent) and perceived job security (down 10.4 per cent).

Older practitioners (over 60 years of age) have high satisfaction for all dimensions of work, while younger practitioners (under 29 years of age) reported the lowest levels of job satisfaction. Younger practitioners are particularly concerned about their salary and work-life balance. Middle-aged participants between the age of 40 and 49 years indicated concern about job security more than other age groups. These ratings likely reflect life stages – e.g., young practitioners have lower salaries, while middle-aged professionals often have families and substantial financial responsibilities such as home mortgages and/or school fees for children.

Practitioners enacting strategic and advisory roles are significantly more satisfied than those in operational roles. Practitioners involved in consultancy, advising, strategy development, and coordination reported greater satisfaction in most aspects of their work, particularly compared to those involved in online and social media activities.
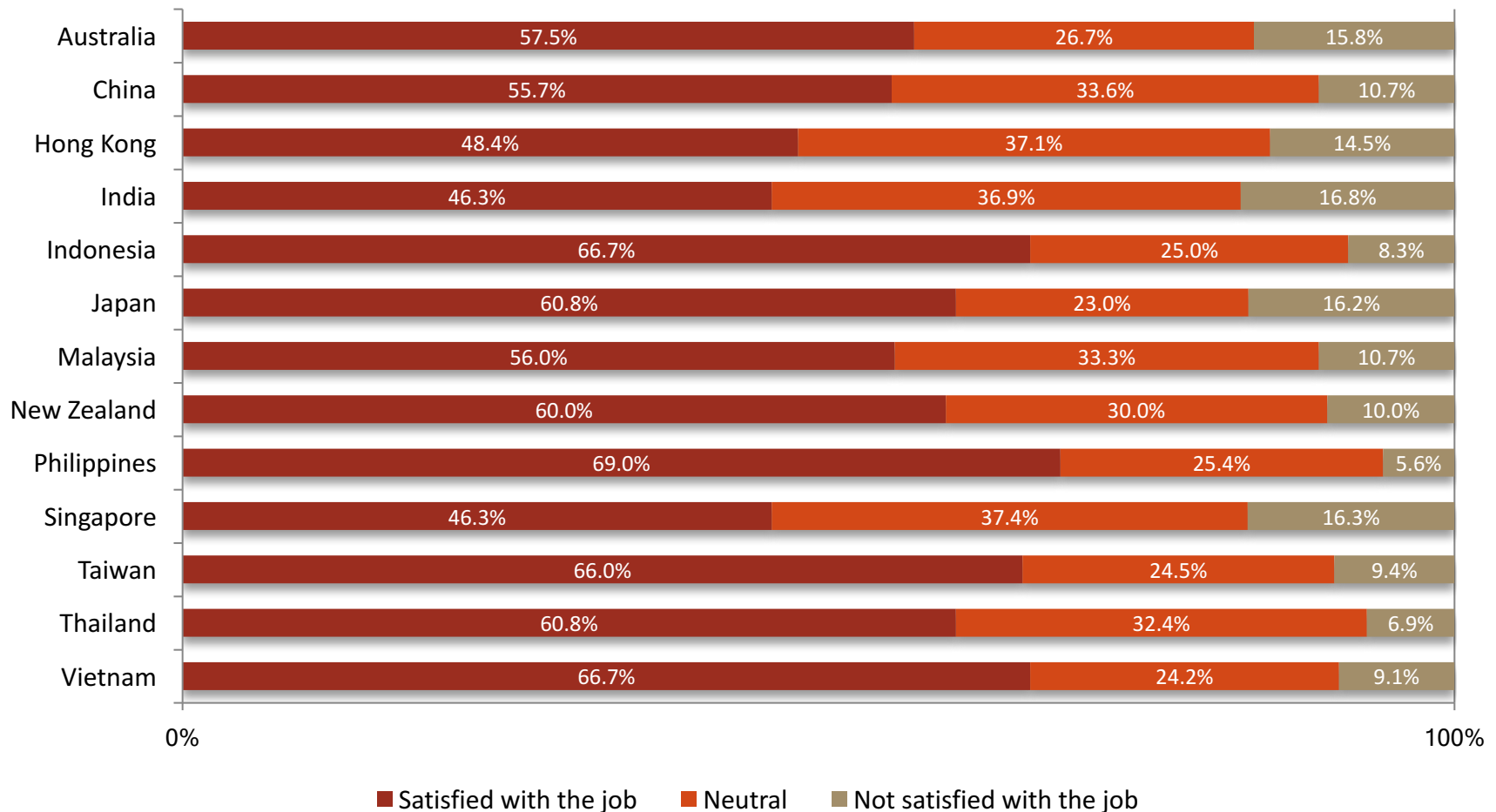
Heads of communication and agency CEOs reported higher levels of job satisfaction than unit leaders, who in turn are more positive than team members. For instance, in rating the extent to which their tasks are 'interesting and manifold', top-level practitioners scored an average of 4.13 on a five-point scale, while unit leaders gave a lower 3.82 mean score and team members/consultants rated their tasks 3.59 out of five on average for interest and variety. However, work-life balance is neither correlated with hierarchy nor with role assignments. Rather, it seems to relate to personal attitudes.

Job satisfaction among communication professionals has decreased
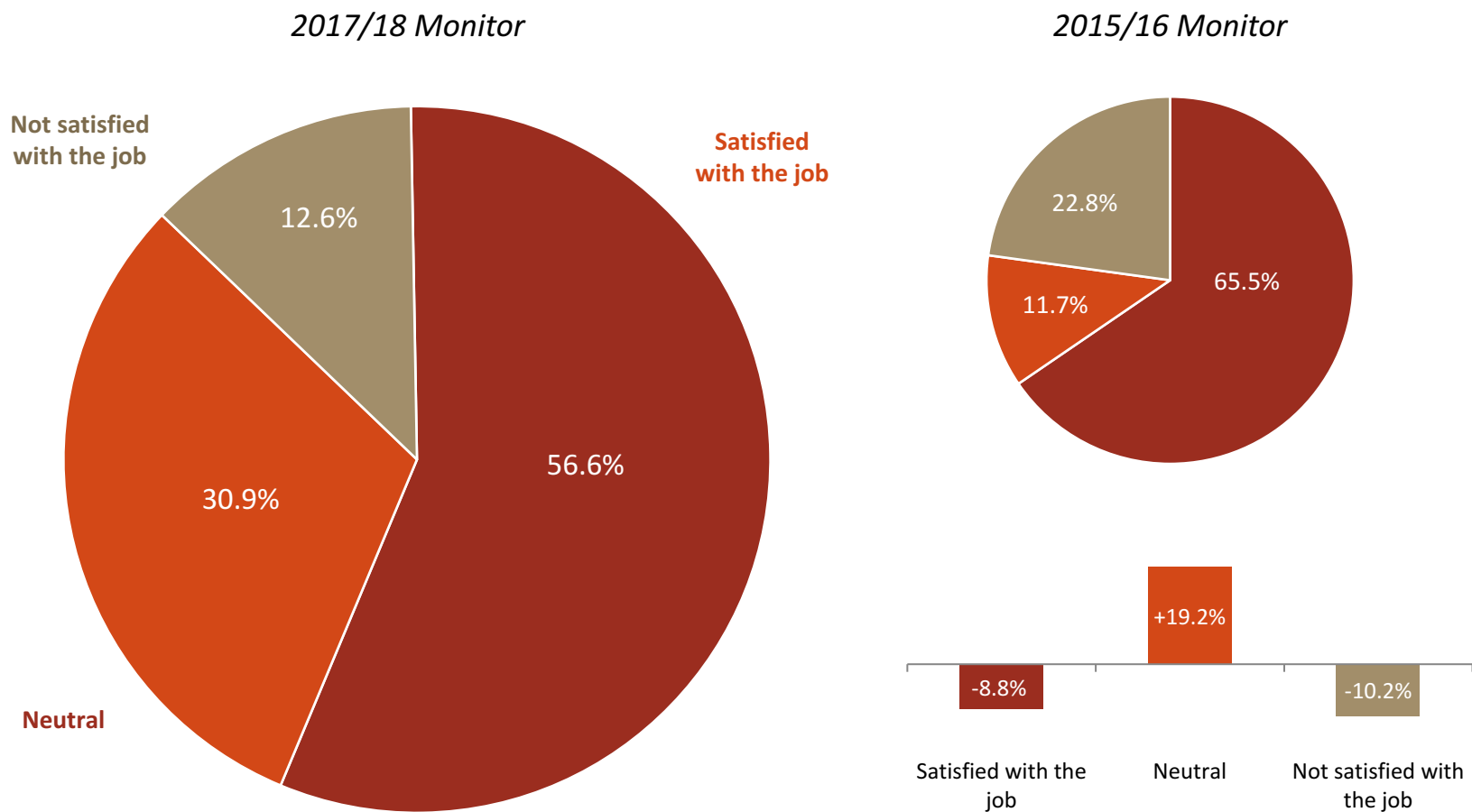
2017/18 Monitor

2015/16 Monitor

Not satisfied with the job — 12.6%

Satisfied with the job — 56.6%

Neutral — 30.9%

22.8%

11.7%

65.5%

+19.2%

-8.8%

-10.2%

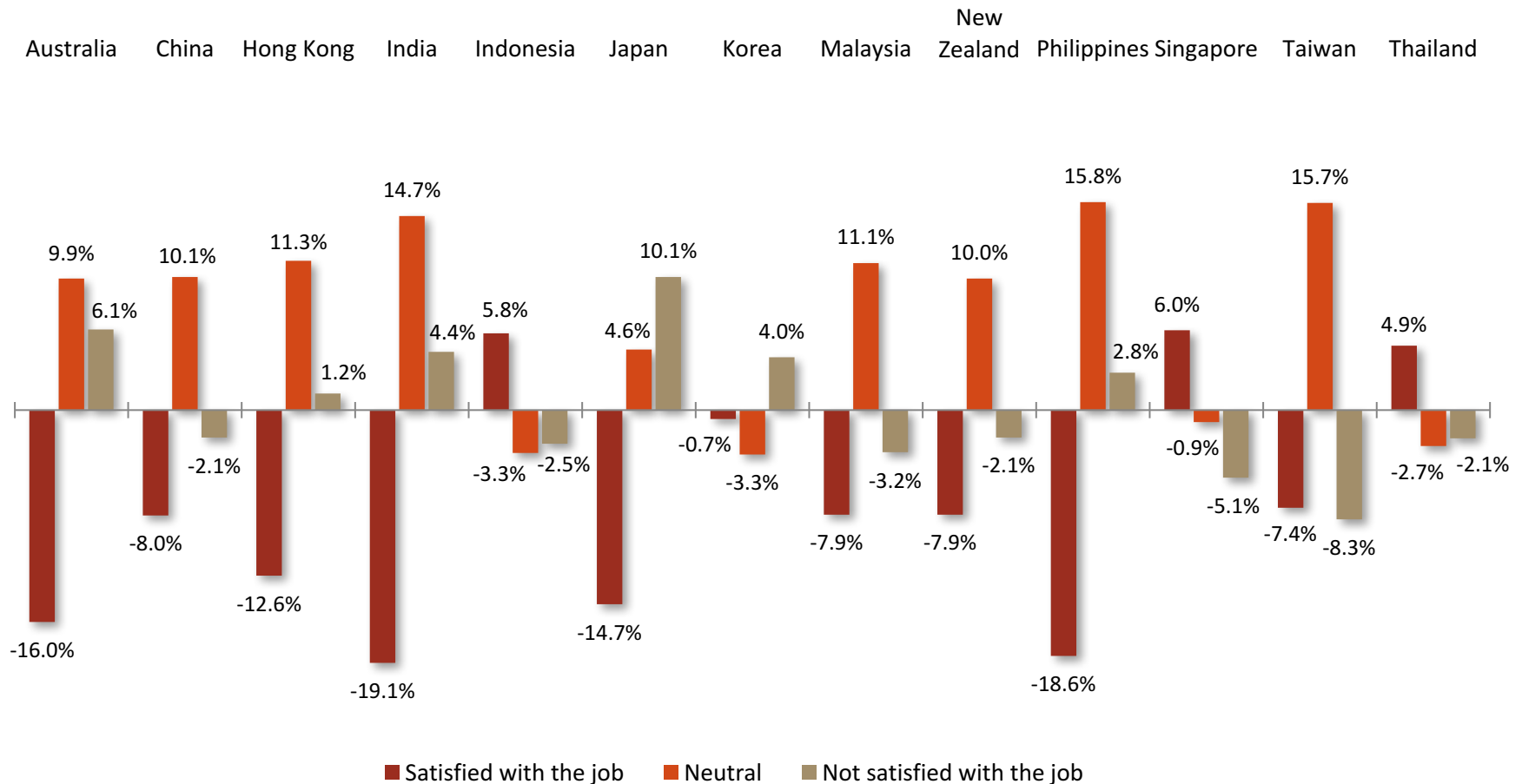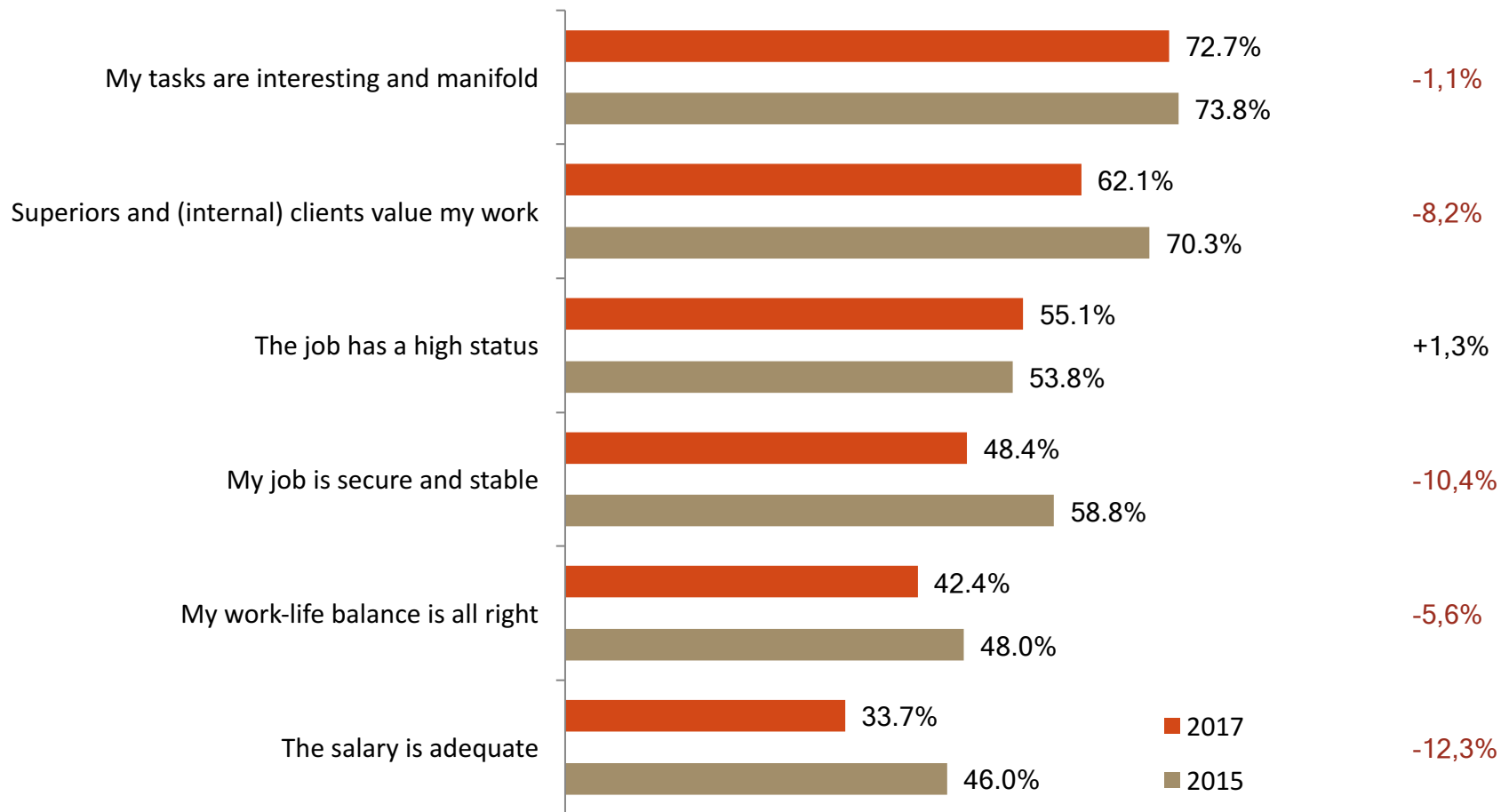Satisfied with the job | Neutral | Not satisfied with the job

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals Macnamara et al. 2015 / n = 1,183 communication professionals. Q 9/10: How do you feel about your actual job situation: Overall, I am satisfied with my job. Scale 1 (Strongly disagree) – 5 (Strongly agree). Perc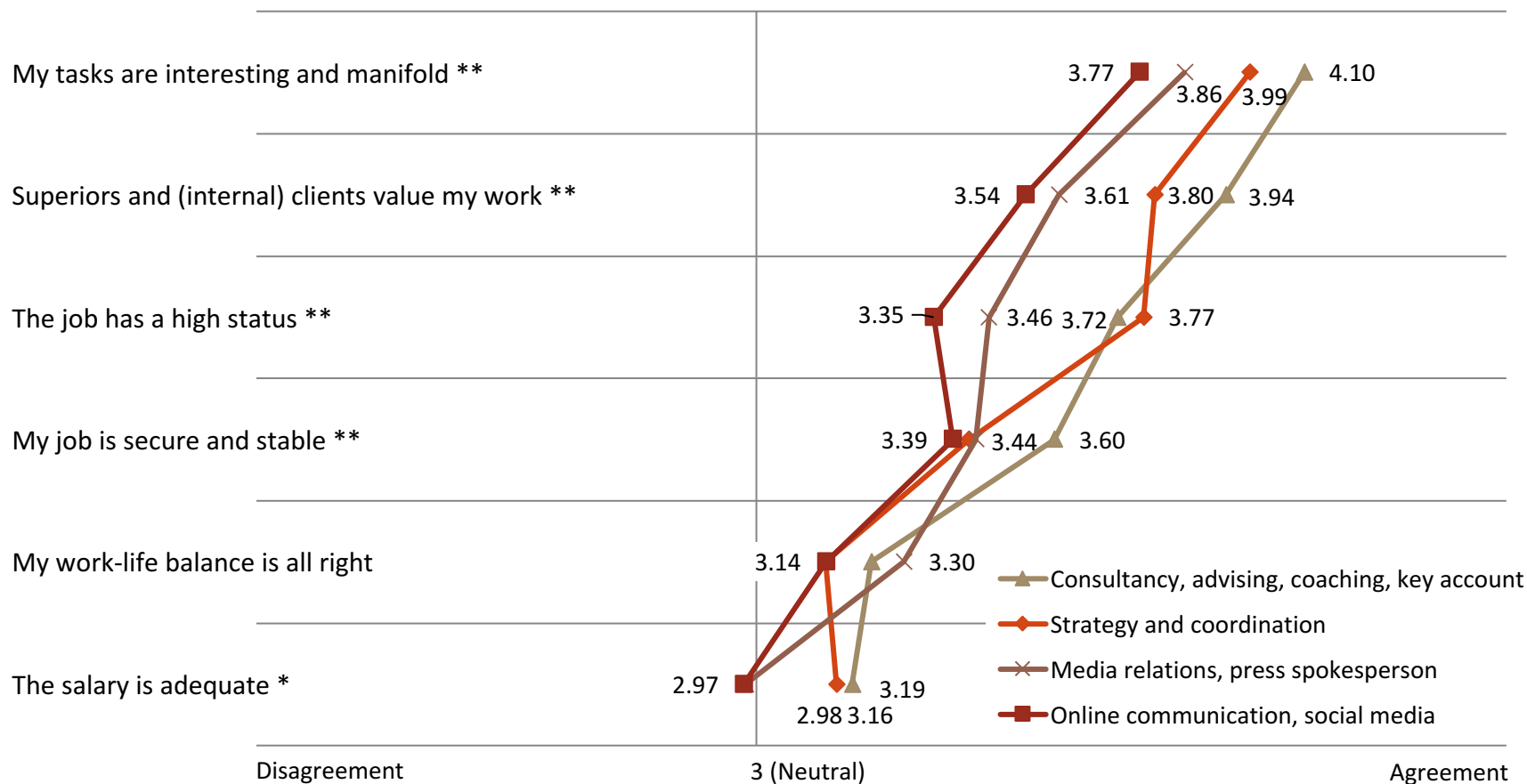entages: Agreement based on scale points 1-2 (Not satisfied), 3 (neutral), 4-5 (satisfied). Means: 3.61 (2017) vs. 3.89 (2015).

Job satisfaction in different countries: Philippines, Indonesia and Vietnam ahead; largest share of unhappy professionals in India, Singapore and Japan

Country	Satisfied with the job	Neutral	Not satisfied with the job
Australia	57.5%	26.7%	15.8%
China	55.7%	33.6%	10.7%
Hong Kong	48.4%	37.1%	14.5%
India	46.3%	36.9%	16.8%
Indonesia	66.7%	25.0%	8.3%
Japan	60.8%	23.0%	16.2%
Malaysia	56.0%	33.3%	10.7%
New Zealand	60.0%	30.0%	10.0%
Philippines	69.0%	25.4%	5.6%
Singapore	46.3%	37.4%	16.3%
Taiwan	66.0%	24.5%	9.4%
Thailand	60.8%	32.4%	6.9%
Vietnam	66.7%	24.2%	9.1%

■ Satisfied with the job ■ Neutral ■ Not satisfied with the job

Longitudinal analysis of job satisfaction in various countries from 2015 to 2017: India reports the sharpest decrease

Legend: ■ Satisfied with the job ■ Neutral ■ Not satisfied with the job

Dimensions of job satisfaction: Only every third practitioners finds the salary adequate – but most enjoy the variety of tasks and recognition received

Dimension	Percentage
My tasks are interesting and manifold	72.7%
Superiors and (internal) clients value my work	62.1%
The job has a high status	55.1%
My job is secure and stable	48.4%
My work-life balance is all right	42.4%
The salary is adequate	33.7%
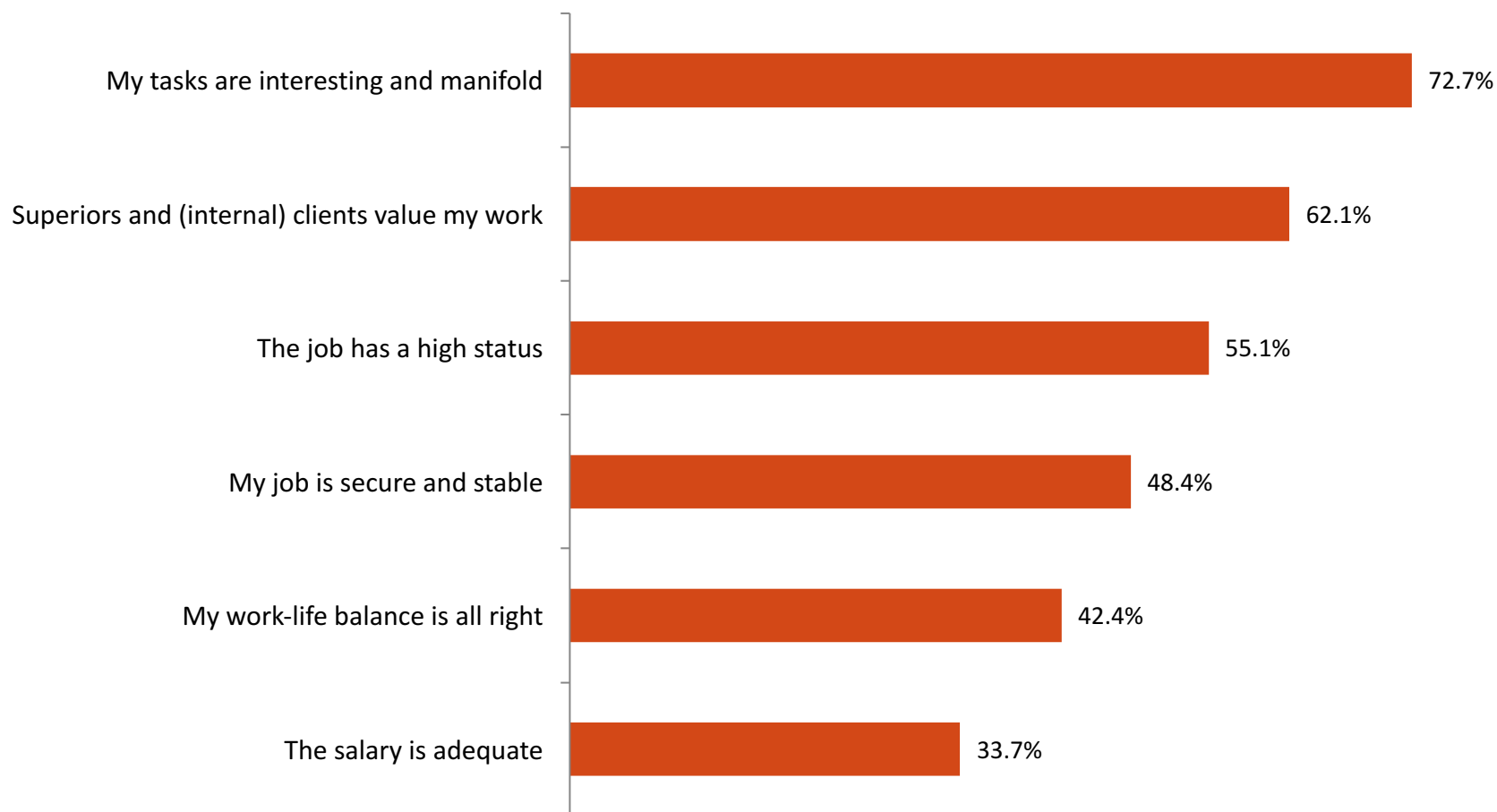
Longitudinal analysis: Job satisfaction among communication professionals in Asia-Pacific has decreased in nearly all dimensions, except the status of the job

Dimension	2017	2015	Change
My tasks are interesting and manifold	72.7%	73.8%	-1,1%
Superiors and (internal) clients value my work	62.1%	70.3%	-8,2%
The job has a high status	55.1%	53.8%	+1,3%
My job is secure and stable	48.4%	58.8%	-10,4%
My work-life balance is all right	42.4%	48.0%	-5,6%
The salary is adequate	33.7%	46.0%	-12,3%

■ 2017
■ 2015

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 1,306 communication professionals; Macnamara et al. 2015 / n = 1,183 communication professionals. Q 9/10: How do you feel about your actual job situation? Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4-5.

Younger communicators report less satisfaction with their status and salary

My tasks are interesting and manifold ** — 3.64 — 4.38

Superiors and (internal) clients value my work ** — 3.60 — 3.95

The job has a high status ** — 3.22 — 3.89

My job is secure and stable — 3.47 — 3.54

My work-life balance is all right ** — 3.10 — 3.57

The salary is adequate ** — 2.87 — 3.41

Disagreement — 3 (Neutral) — Agreement

| 29 or younger | 30 - 39 | 40 - 49 | 50 - 59 | 60 or older |
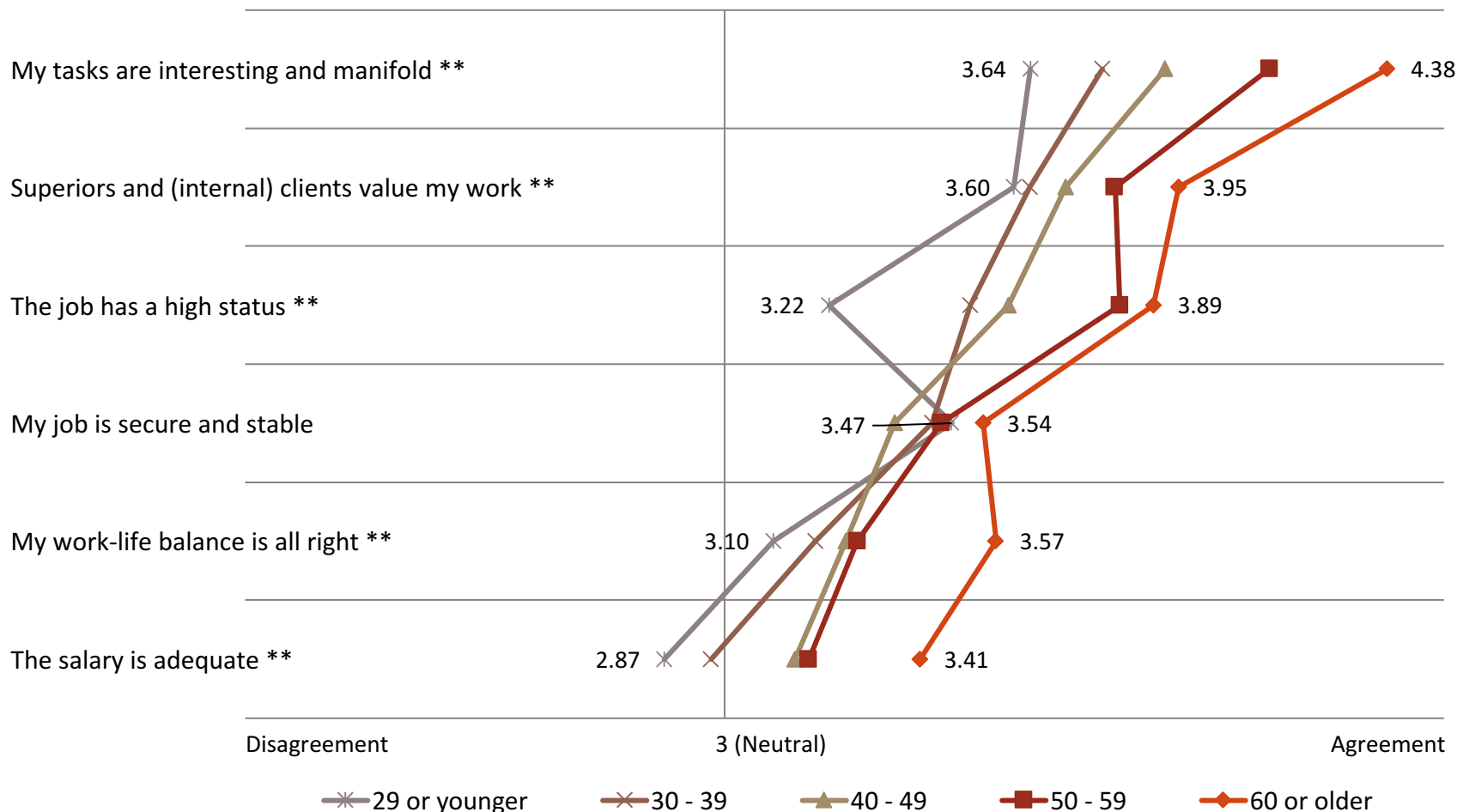
Practitioners enacting strategic and advising roles are significantly more satisfied

My tasks are interesting and manifold ** — 3.77, 3.86, 3.99, 4.10

Superiors and (internal) clients value my work ** — 3.54, 3.61, 3.80, 3.94

The job has a high status ** — 3.35, 3.46, 3.72, 3.77

My job is secure and stable ** — 3.39, 3.44, 3.60

My work-life balance is all right — 3.14, 3.30

The salary is adequate * — 2.97, 2.98, 3.16, 3.19

Legend:
- Consultancy, advising, coaching, key account
- Strategy and coordination
- Media relations, press spokesperson
- Online communication, social media

Disagreement   3 (Neutral)   Agreement

Most dimensions of job satisfaction are correlated with the hierarchical position – except work-life-balance

	Team member / consultant	Unit leader	Head of communication
My tasks are interesting and manifold **	3.59	3.82	4.13
Superiors and (internal) clients value my work **	3.49	3.65	3.86
The job has a high status **	3.17	3.51	3.85
My job is secure and stable **	3.42	3.33	3.49
My work-life balance is all right	3.26	3.14	3.28
The salary is adequate **	2.88	2.99	3.22

(1) Strongly disagree   (3) Neutral   Strongly agree (5)
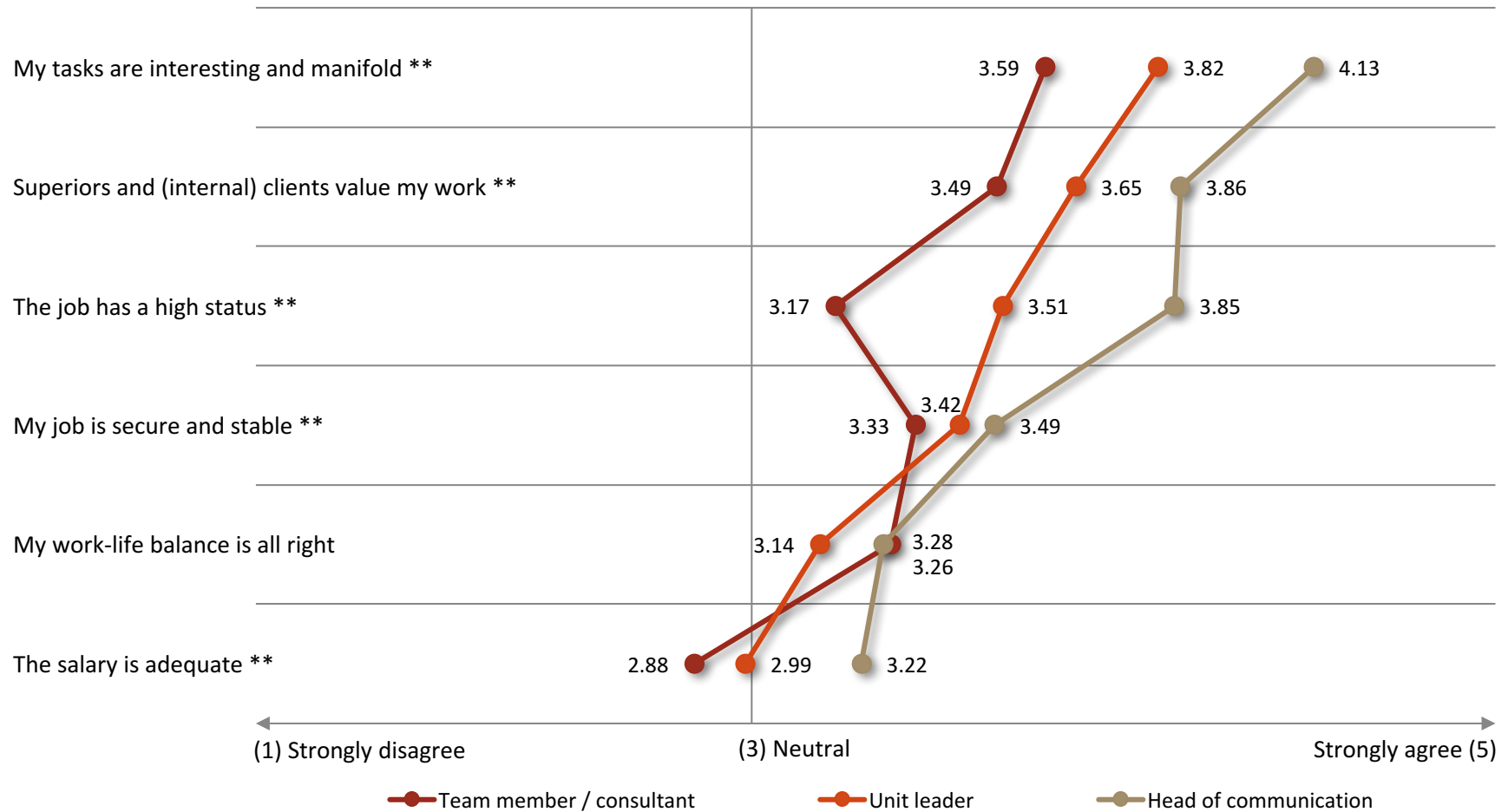
Communication departments' contribution to organisational success

Chapter overview

Strategic communication has been traditionally characterised by its orientation to support achievement of organisational goals (Hallahan et al., 2007). Nevertheless, previous studies indicate that communicators seldom report on how their department contributes to overall strategic goals (Brønn, 2014), and that they use a variety of different explanations for their activities (Adi & Macnamara, 2016). Senior management, on the other side, sometimes find it difficult to understand the variety of roles that communication practitioners can play. They often perceive them as channel managers or technicians (Falkheimer et al., 2017).

Recent research has categorised the different contributions of communication departments to overall organisational success into four clusters: (1) convey and multiply; (2) align and contribute; (3) steer and manage; (4) advise and coach. These in turn are rated on two dimensions: (a) strategic and (b) operational (Volk et al., 2017; Zerfass & Volk, 2017).

The APCM 2017/18 survey asked heads of communication departments to reflect on these contributions of their departments to their organisation's success. Their responses revealed a broad range of support for overarching goals. The contributions most highly rated were supporting organisational goals and processes through communication (80.7 per cent); translating organisational strategy to communication strategy (77.7 per cent); and communicating organisational strategy to stakeholders (76.2 per cent). Less than three-quarters (72.6 per cent) of practitioners report that they are involved in 'consulting on the strategic development of the organisation'. 'Enabling top management to communicate professionally' is reported as a key contribution by just over two-thirds of practitioners (67.3 per cent) and 60.9 per cent report 'convincing critical stakeholders to support organisational strategy' as a key contribution to their organisation.

Communication leaders in joint stock (public) companies and governmental organisations are most aware of the various contributions, while communicators in non-profits and private companies are less attuned to the potential for communication to contribute to overall organisational success.

Communication heads report that senior management demands a wide range of activities from their departments, but with a strong focus on operational aspects. According to communication leaders, senior management is often unaware of the full range of strategic and operational contributions available from their departments. Thus, there remains a substantial gap between communication capabilities and management demands in many cases – and therefore an opportunity for communication to play a greater role in organisational success. For example, while 67.3 per cent of communication heads see 'coaching/enabling top management and others to communicate' as a key contribution to their organisation, only 48.9 per cent of senior management recognise this as a possible contribution.

Heads of communication confirm a broad range of contributions of their departments to organisational success, but not all aspects are equally prevalent
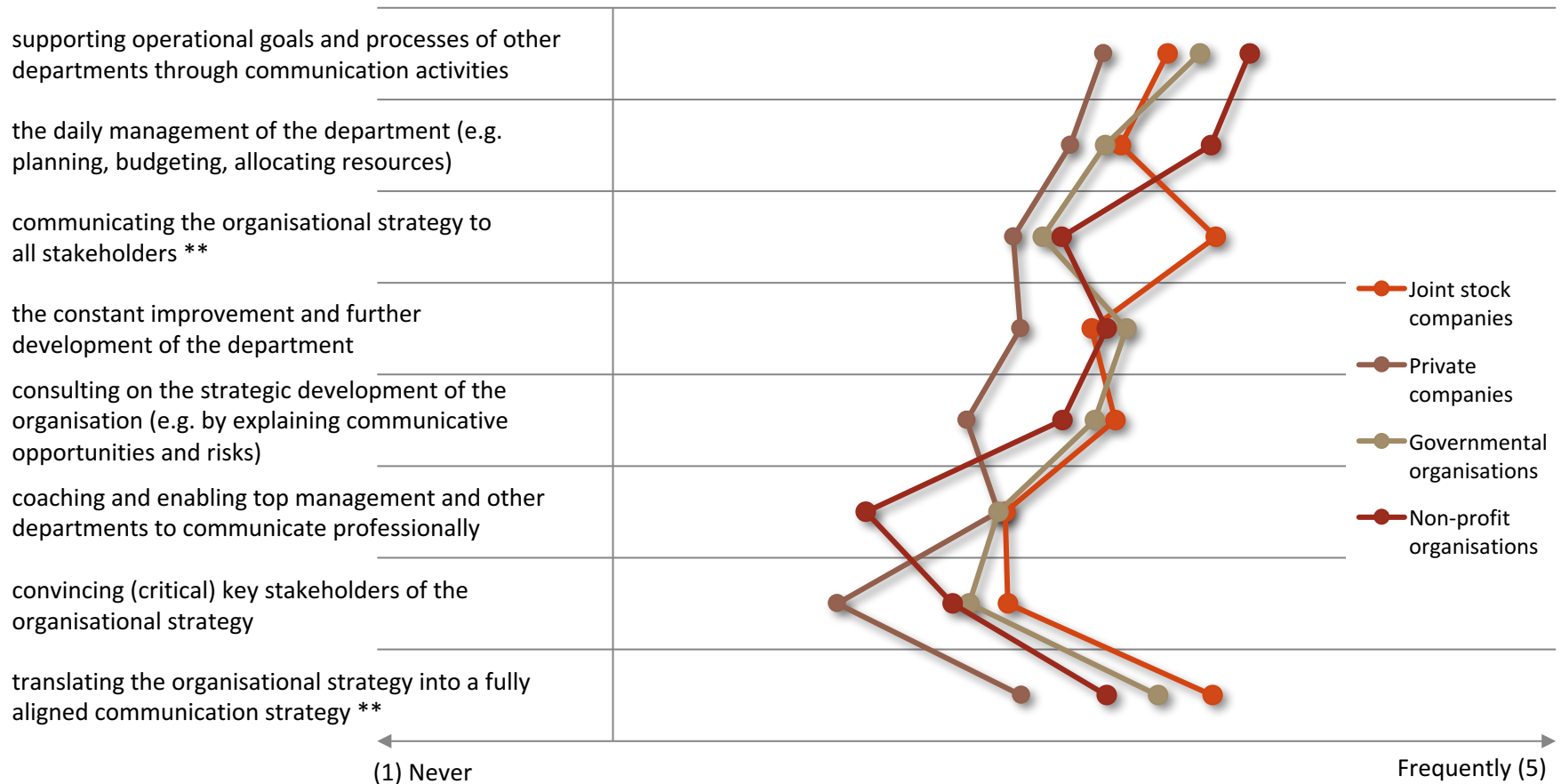
The contribution of the communication department to overall success includes …

supporting operational goals and processes of other departments through communication activities	80.7%
translating the organisational strategy into a fully aligned communication strategy	77.7%
communicating the organisational strategy to all stakeholders	76.2%
the daily management of the department (e.g. planning, budgeting, allocating resources)	74.2%
consulting on the strategic development of the organisation (e.g. by explaining communicative opportunities and risks)	72.6%
the constant improvement and further development of the department	71.5%
coaching and enabling top management and other departments to communicate professionally	67.3%
convincing (critical) key stakeholders of the organisational strategy	60.9%

www.communicationmonitor.asia / Macnamara et al. 2017 / n ≥ 314 heads of communication departments. Q 13: Communication departments can contribute to the overall success of organisations in many different ways. The strategic / operational contribution of my department includes … Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Items based on the Communications Contributions Framework (CCF) by Zerfass & Volk 2017.

Communication leaders in different types of organisations report a partly different understanding why communications is relevant for success

The contribution of the communication department to overall success includes …

supporting operational goals and processes of other departments through communication activities

the daily management of the department (e.g. planning, budgeting, allocating resources)

communicating the organisational strategy to all stakeholders **

the constant improvement and further development of the department

consulting on the strategic development of the organisation (e.g. by explaining communicative opportunities and risks)

coaching and enabling top management and other departments to communicate professionally

convincing (critical) key stakeholders of the organisational strategy

translating the organisational strategy into a fully aligned communication strategy **

Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations

(1) Never   Frequently (5)

83

A systematic analysis shows that communication leaders have a rather balanced understanding of communications' contribution to success

	Convey & Multiply 68.4%	**Align & Contribute** 79.2%	**Manage & Steer** 72.8%	**Advise & Coach** 70.0%
Strategic contributions 70.7%	Convincing (critical) key stakeholders of the organisational strategy — 60.9%	Translating the organisational strategy into a fully aligned communication strategy — 77.7%	Constant improvement and further development of the department — 71.5%	Consulting on the strategic development of the organisation — 72.6%
Operational contributions 74.6%	Communicating the organisational strategy to all stakeholders — 76.2%	Supporting operational goals and processes of other departments through communication activities — 80.7%	Daily management of the department — 74.2%	Coaching and enabling top management and other departments to communicate professionally — 67.3%

Communicators state that top management demands the whole range of activities from their departments – with a strong focus on operational aspects

Contributions of the communication department for overall success demanded by top management

convincing (critical) key stakeholders of the organisational strategy	60.9%
communicating the organisational strategy to all stakeholders	76.2%
translating the organisational strategy into a fully aligned communication strategy	77.7%
supporting operational goals and processes of other departments through communication activities	80.7%
the constant improvement and further development of the department	71.5%
the daily management of the department (e.g. planning, budgeting, allocating resources)	74.2%
consulting on the strategic development of the organisation (e.g. by explaining communicative opportunities and risks)	72.6%
coaching and enabling top management and other departments to communicate professionally	67.3%

■ Strategic contributions and ■ operational contributions demanded by top management

85

According to respondents, top managers are not aware of the full range of strategic and operational contributions provided by their departments

	Convey & Multiply Δ 9.4	**Align & Contribute** Δ 4.7	**Manage & Steer** Δ 14.8	**Advise & Coach** Δ 15.7
Strategic contributions Δ 9.8	Convincing (critical) key stakeholders of the organisational strategy	Translating organisational strategy into a communication strategy	Constant improvement and further development of the department	Consulting on the strategic development of the organisation
	Comm. Leaders 60.9% — Top Management 52.0% — Δ 8.9	Comm. Leaders 77.7% — Top Management 75.7% — Δ 2.0	Comm. Leaders 71.5% — Top Management 56.5% — Δ 15.0	Comm. Leaders 72.6% — Top Management 59.6% — Δ 13.0
Operational contributions Δ 12.6	Communicating the organisational strategy to all stakeholders	Supporting other departments through communication activities	Daily management of the department	Coaching/enabling top management and others to communicate
	Comm. Leaders 76.2% — Top Management 66.2% — Δ 10.0	Comm. Leaders 80.7% — Top Management 73.3% — Δ 7.4	Comm. Leaders 74.2% — Top Management 59.5% — Δ 14.7	Comm. Leaders 67.3% — Top Management 48.9% — Δ 18.4

Expectation gap between perceived contributions of communication departments and demands of top management in different types of organisations

Contributions of the communication department to overall success …	Companies		Governmental organisations		Non-profit organisations		Overall	
	Contribution	Demand	Contribution	Demand	Contribution	Demand	Contribution	Demand
convincing (critical) key stakeholders of the organisational strategy	60,3%	50,2%	64,4%	55,6%	60,5%	58,1%	60,9%	52,0%
communicating the organisational strategy to all stakeholders	76,9%	64,5%	73,3%	71,1%	75,6%	70,7%	76,2%	66,2%
translating the organisational strategy into a fully aligned communication strategy	77,9%	77,2%	82,2%	71,1%	72,1%	72,1%	77,7%	75,7%
supporting operational goals and processes of other departments through communication activities	78,8%	73,3%	86,7%	68,9%	85,0%	78,0%	80,7%	73,3%
the constant improvement and further development of the department	69,7%	56,4%	80,0%	53,3%	72,1%	60,5%	71,5%	56,5%
the daily management of the department (e.g., planning, budgeting, allocating resources)	71,5%	58,3%	77,8%	51,1%	85,4%	75,6%	74,2%	59,5%
consulting on the strategic development of the organisation (e.g., by explaining communicative opportunities and risks)	71,7%	58,1%	77,8%	62,2%	72,1%	65,1%	72,6%	59,6%
coaching and enabling top management and other departments to communicate professionally	67,4%	48,1%	72,7%	51,1%	61,0%	51,2%	67,3%	48,9%

Characteristics of excellent communication departments

Chapter overview

This study used a method introduced in previous editions of the European, Latin America and Asia-Pacific Communication Monitor (Zerfass et al., 2016, 2017; Moreno et al., 2017; Macnamara et al., 2015) to identify excellent communication departments. The approach, known as the Comparative Excellence Framework for Communication Management, combines self-assessments by communication professionals with statistical analyses (Verčič & Zerfass, 2016; Tench et al., 2017). It differs from normative concepts of excellence that describe excellence from an outside prescriptive stance (Grunig, 1992; Grunig et al., 2002), but has resulted in comparable overall findings across the regions.

In this assessment, identification of excellence is based on two dimensions: (1) the influence of the communication department within the organisation and (2) performance based on external results achieved and the qualifications of the department. These two dimensions are each assessed against two factors. Internal influence is assessed in terms of 'advisory influence' (the extent to which senior managers take the recommendations of the communication function seriously) and 'executive influence' (the extent to which communication practitioners are involved in senior-level strategic planning). Performance is assessed in terms of 'success' (i.e., results of communication) and the 'competence' of the department (e.g., where the quality of the communication function is better than competing organisations). Only organisations outperforming others in all four areas are considered excellent in this benchmarking exercise.

Based on this measure, one-fifth (21.1 per cent) of the sampled departments across Asia-Pacific qualified as excellent. Excellence varied significantly between types of organisations and countries. Communication departments in joint stock (public) companies led with 22.8 per cent assessed as excellent, followed by private companies and non-profit organisations each with 20.9 per cent of their depart-ments rated excellent. Communication departments in governmental organisations reportedly lag, with just 17.7 per cent rated excellent in communication.

Surprisingly, the highest proportions of excellent departments are reported in the Philippines, New Zealand, India, and Indonesia, whereas participants in Singapore, Australia, Hong Kong, Taiwan and Japan are more self-critical of their department's performance. It must be borne in mind that this assessment is based on self-reporting and the focus of the method is to identify drivers of excellence rather than excellence overall.

When looking at those drivers, 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.

These insights show where communication leaders can start their journey to gain excellence for their teams and departments.

Identifying excellent communication departments

The Comparative Excellence Framework uses statistical analyses to identify outperforming organisations, based on benchmarking 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)

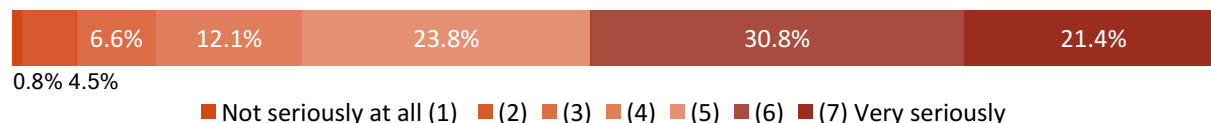The communication of the organisation in general is (very) successful
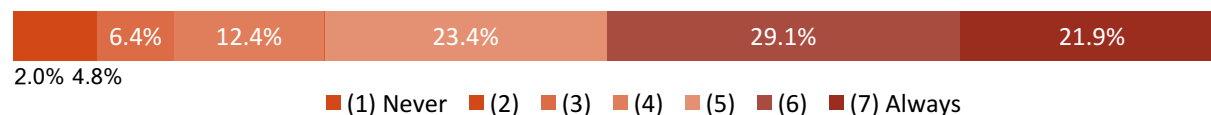
COMPETENCE

(Q18)

The quality and ability of the communication function is (much) better compared to those of competing organisations
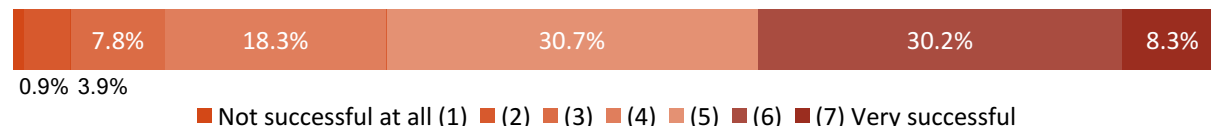
www.communicationmonitor.asia / Macnamara et al. 2017 / Q 15-18 / Only organisations outperforming in all four dimensions (scale points 6-7 on a 7-point-scale) will be considered as "excellent" in the benchmark exercise comparing distribution and characteristics of organisations, departments and communication professionals. For a description of the framework and method see Vercic & Zerfass 2016 and Tench et al. 2017.

Excellent communication departments

Advisory influence

| 0.8% | 4.5% | 6.6% | 12.1% | 23.8% | 30.8% | 21.4% |

■ Not seriously at all (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ (7) Very seriously

Executive influence

| 2.0% | 4.8% | 6.4% | 12.4% | 23.4% | 29.1% | 21.9% |

■ (1) Never ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ (7) Always

Success

| 0.9% | 3.9% | 7.8% | 18.3% | 30.7% | 30.2% | 8.3% |

■ Not successful at all (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ (7) Very successful

Competence

| 1.6% | 4.0% | 7.4% | 18.5% | 26.0% | 28.7% | 13.8% |

■ Much worse (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ (7) Much better

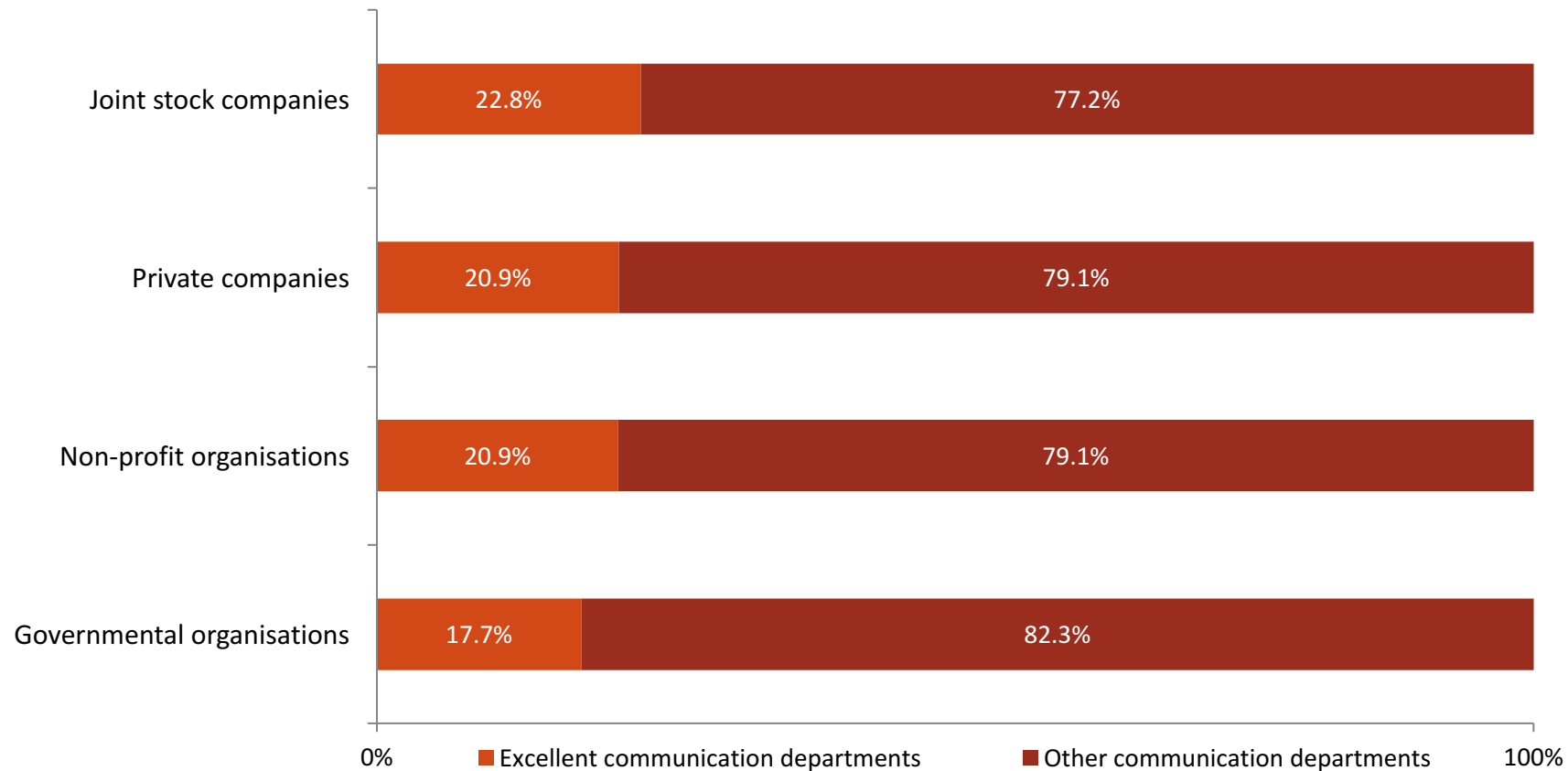**Excellent communication departments 21.1%**
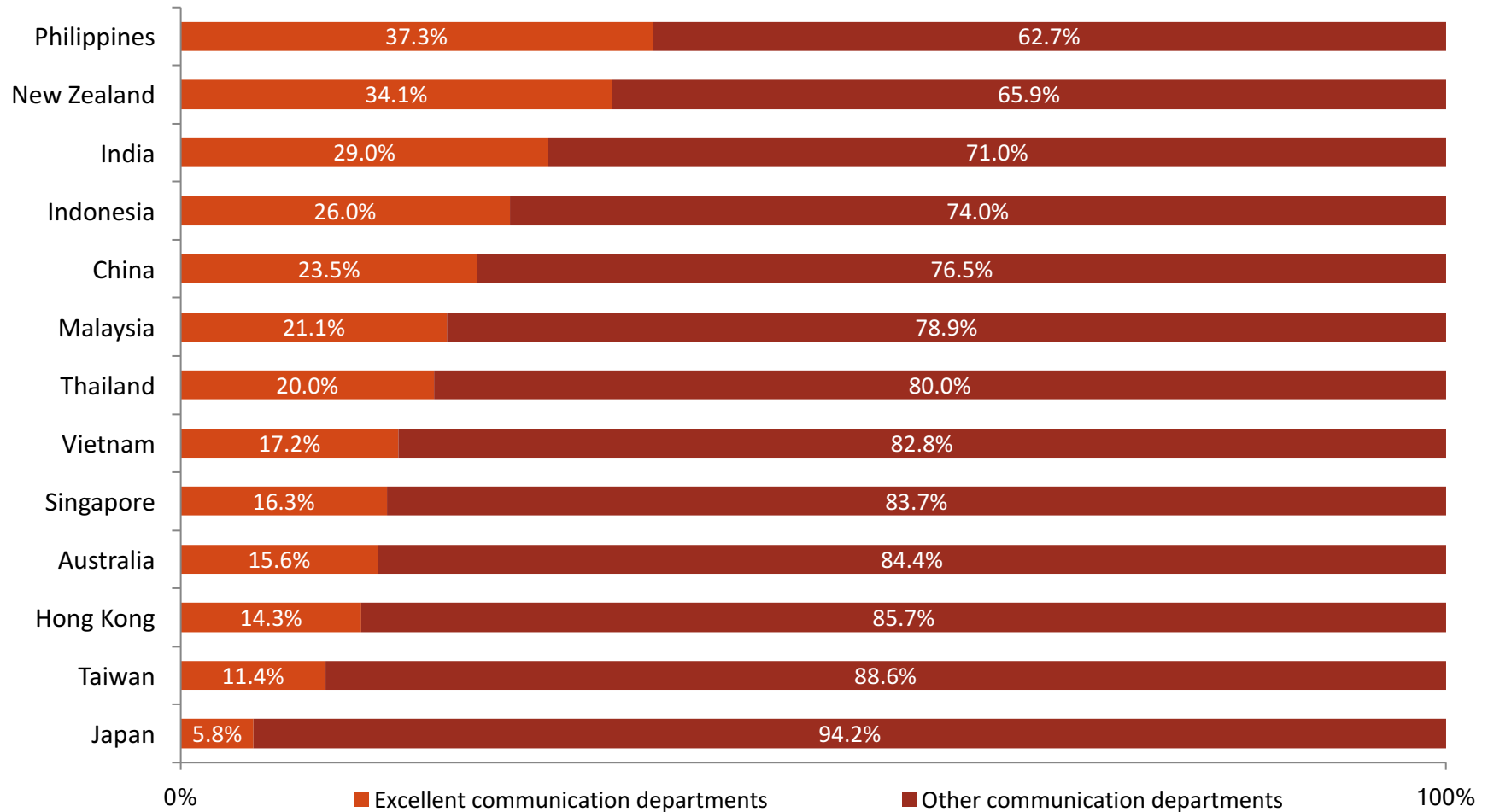
Other communication departments 78.9%

www.communicationmonitor.asia /Macnamara et al. 2017 / n = 928 communication 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.

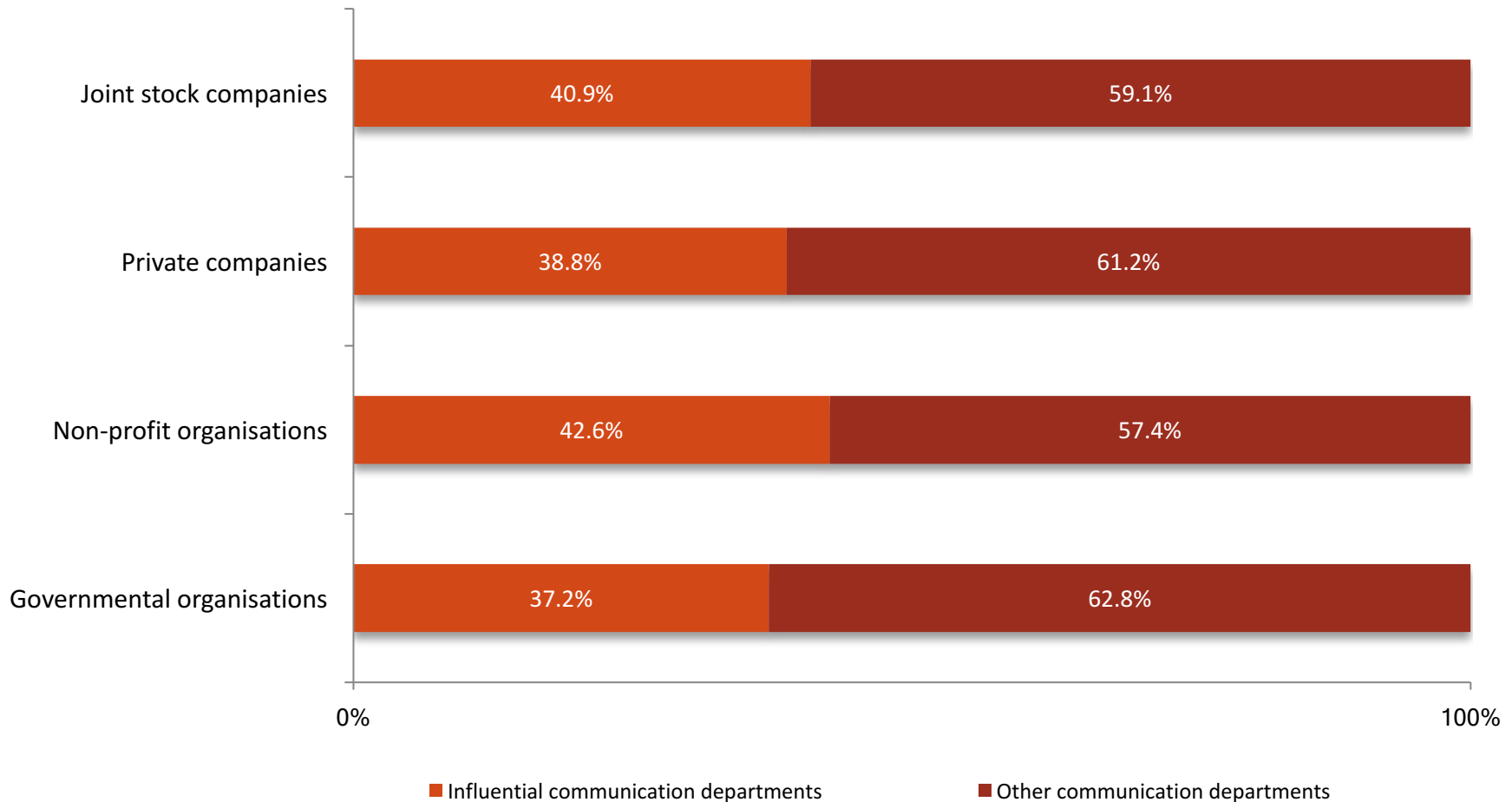# Excellent communication departments in different types of organisations

Organisation type	Excellent communication departments	Other communication departments
Joint stock companies	22.8%	77.2%
Private companies	20.9%	79.1%
Non-profit organisations	20.9%	79.1%
Governmental organisations	17.7%	82.3%

0%　　■ Excellent communication departments　　■ Other communication departments　　100%

Excellent communication departments: Significant discrepancies and surprisingly low self-assessments in Singapore, Australia, Hong Kong, Taiwan, Japan
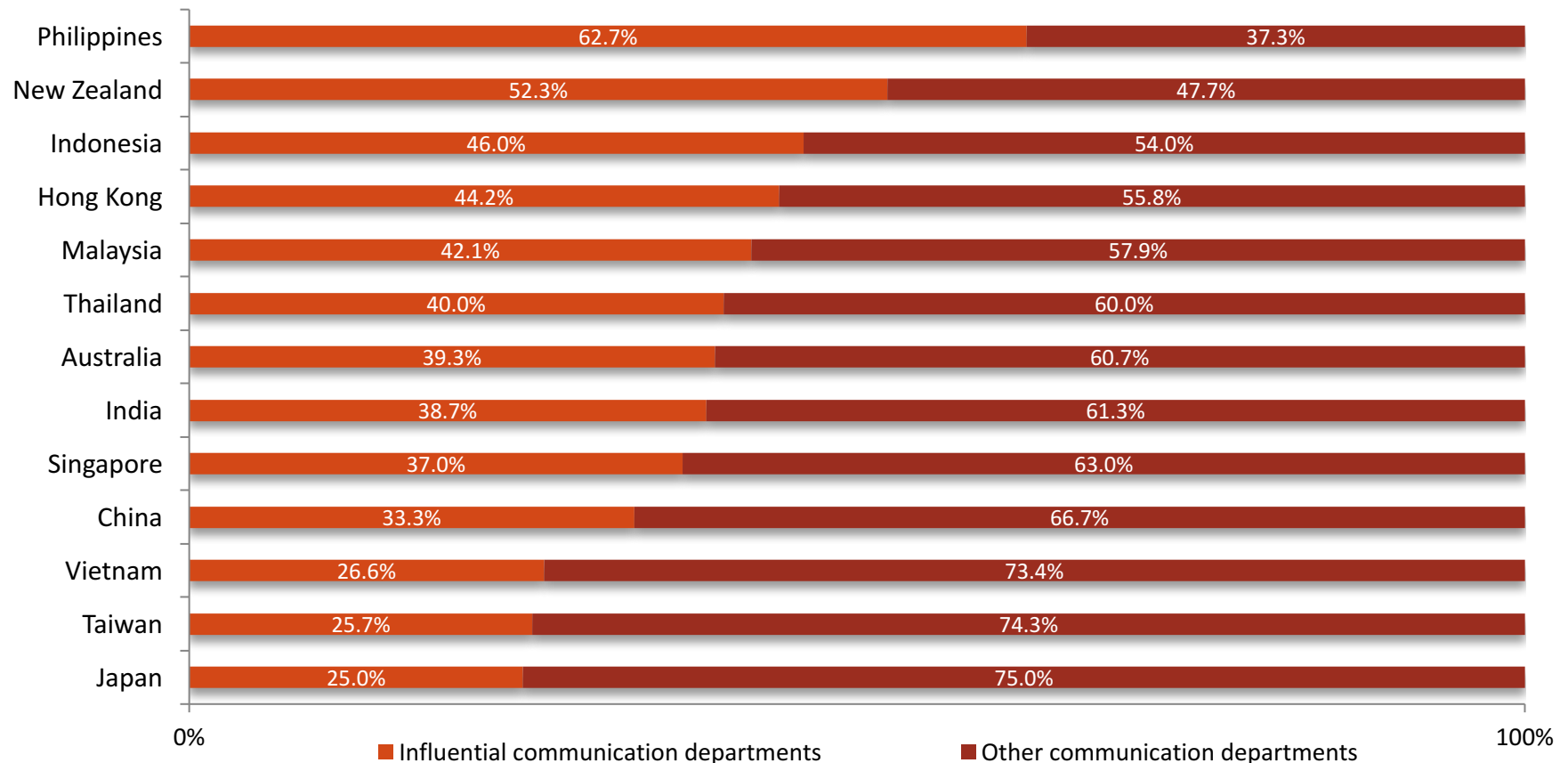

Country	Excellent communication departments	Other communication departments
Philippines	37.3%	62.7%
New Zealand	34.1%	65.9%
India	29.0%	71.0%
Indonesia	26.0%	74.0%
China	23.5%	76.5%
Malaysia	21.1%	78.9%
Thailand	20.0%	80.0%
Vietnam	17.2%	82.8%
Singapore	16.3%	83.7%
Australia	15.6%	84.4%
Hong Kong	14.3%	85.7%
Taiwan	11.4%	88.6%
Japan	5.8%	94.2%

0% ■ Excellent communication departments   ■ Other communication departments 100%

93

Influential communication departments:
Non-profits and joint-stock companies are leading the field

	Influential communication departments	Other communication departments
Joint stock companies	40.9%	59.1%
Private companies	38.8%	61.2%
Non-profit organisations	42.6%	57.4%
Governmental organisations	37.2%	62.8%

0%   100%

■ Influential communication departments   ■ Other communication departments

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 928 communication 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 departments based on scale points 6-7.

Influence of communication departments: Significant differences between countries with Japan, Taiwan and Vietnam ranking at the end
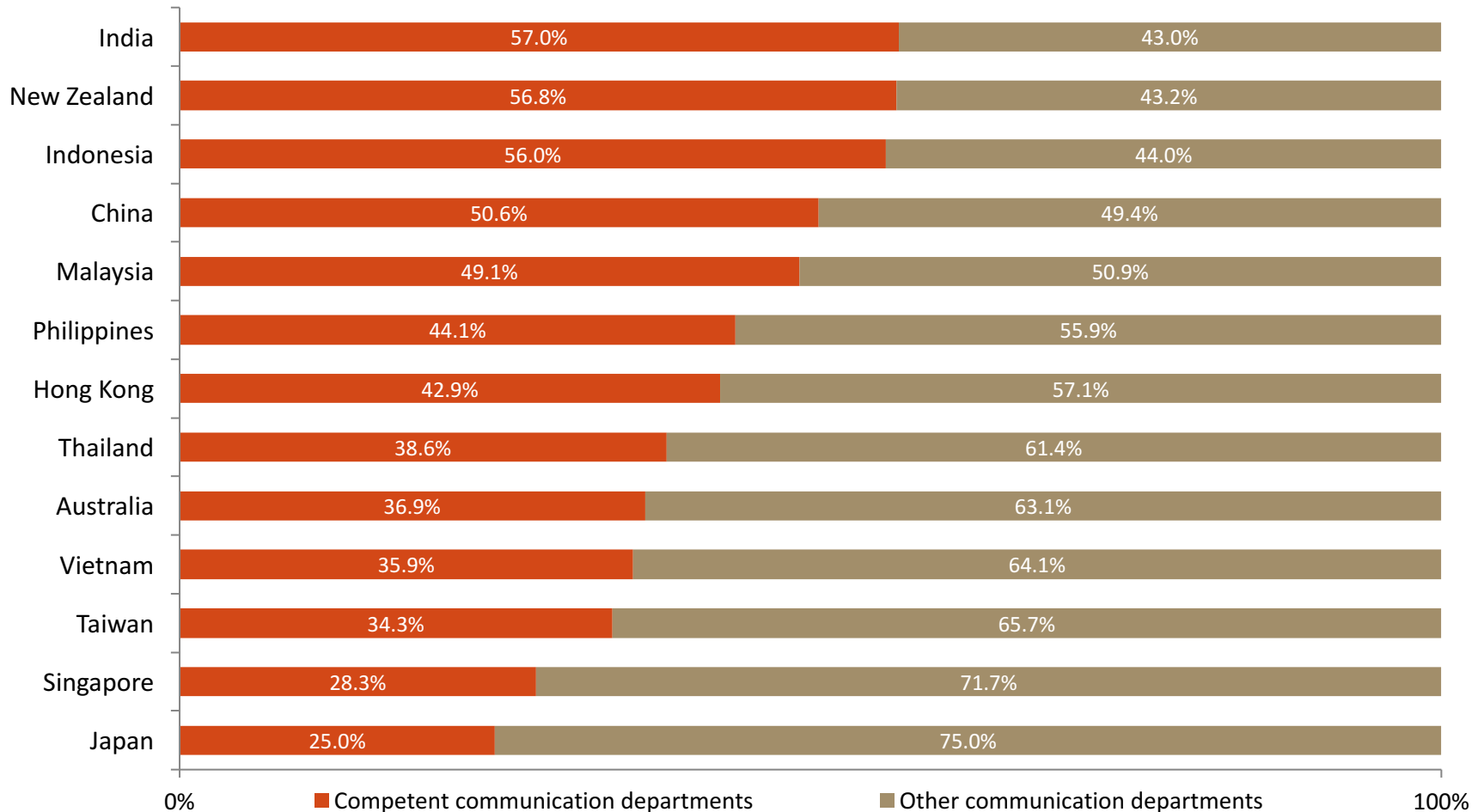

Country	Influential communication departments	Other communication departments
Philippines	62.7%	37.3%
New Zealand	52.3%	47.7%
Indonesia	46.0%	54.0%
Hong Kong	44.2%	55.8%
Malaysia	42.1%	57.9%
Thailand	40.0%	60.0%
Australia	39.3%	60.7%
India	38.7%	61.3%
Singapore	37.0%	63.0%
China	33.3%	66.7%
Vietnam	26.6%	73.4%
Taiwan	25.7%	74.3%
Japan	25.0%	75.0%

■ Influential communication departments   ■ Other communication departments

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 896 communication professionals in communication departments from 13 countries. 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 departments based on scale points 6-7. Highly significant differences between countries (chi-square test, p ≤ 0.01, Cramér's V = 0.187).

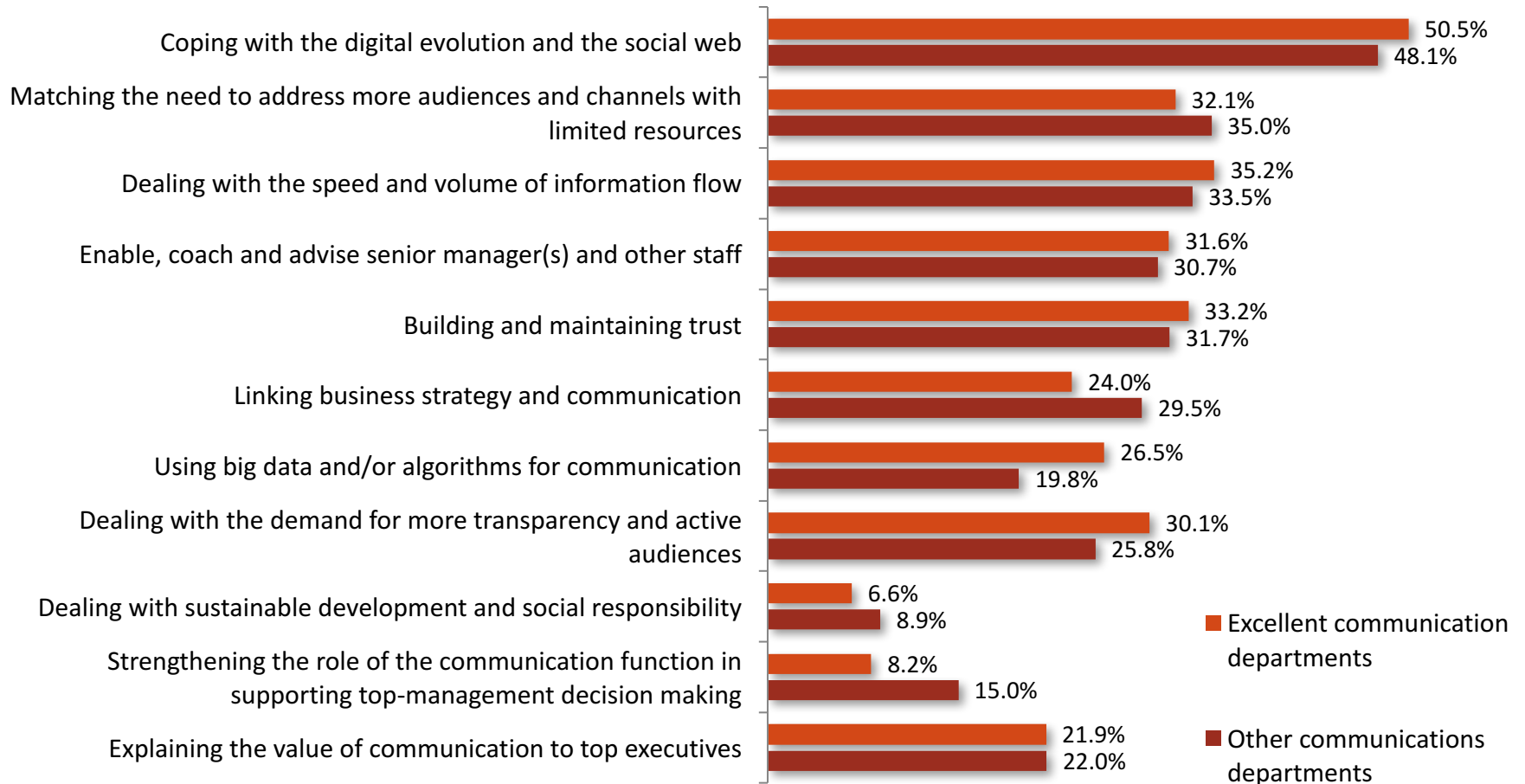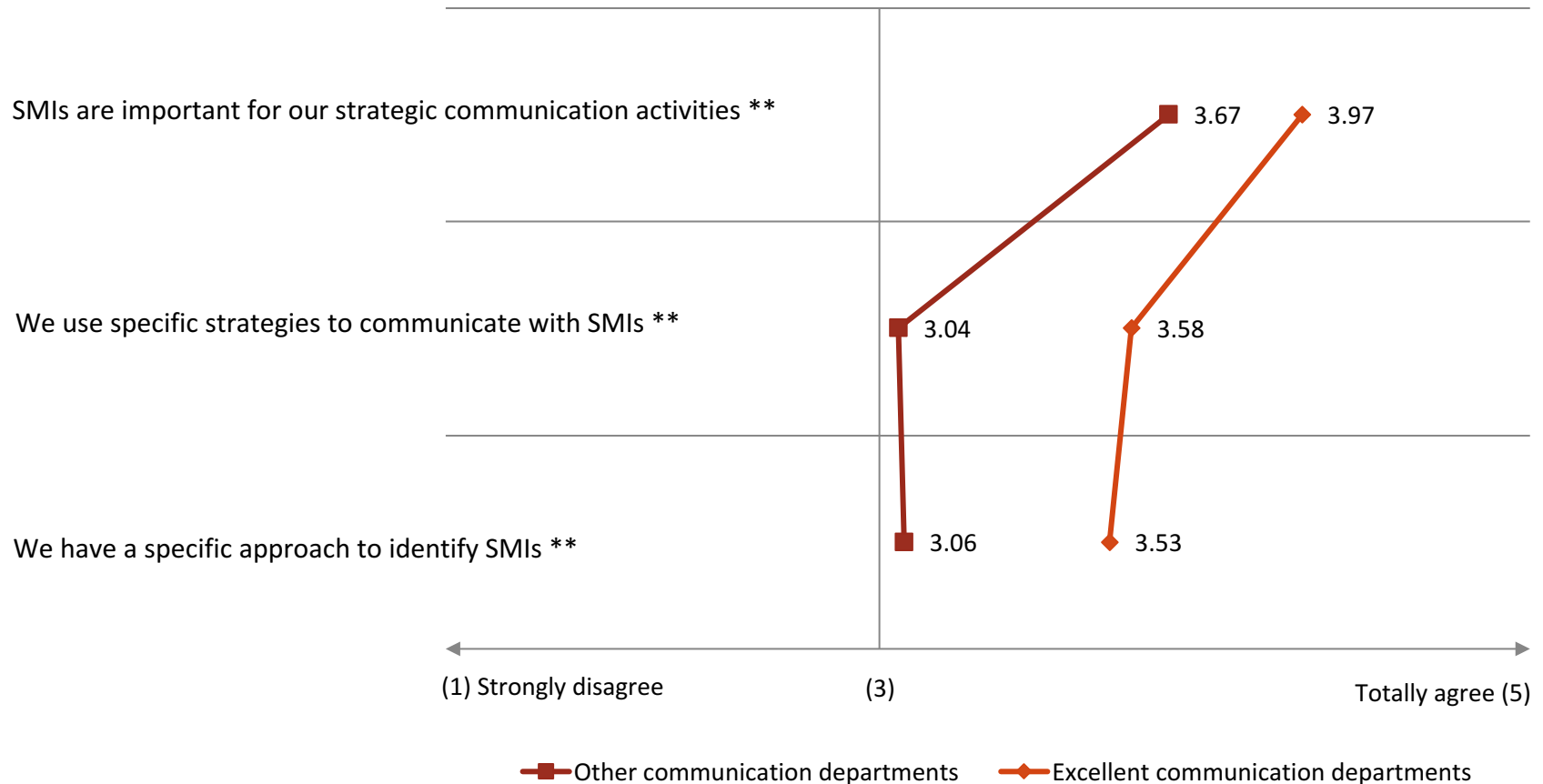# Competence in communication departments: Governmental organisations are lagging behind

Joint stock companies
- Competent communication departments: 44.6%
- Other communication departments: 55.4%

Private companies
- Competent communication departments: 44.1%
- Other communication departments: 55.9%

Non-profit organisations
- Competent communication departments: 41.7%
- Other communication departments: 58.3%

Governmental organisations
- Competent communication departments: 35.4%
- Other communication departments: 64.6%

0% ■ Competent communication departments   ■ Other communication departments   100%

Competent communication departments in various countries: India, New Zealand and Indonesia are leading the field

Country	Competent communication departments	Other communication departments
India	57.0%	43.0%
New Zealand	56.8%	43.2%
Indonesia	56.0%	44.0%
China	50.6%	49.4%
Malaysia	49.1%	50.9%
Philippines	44.1%	55.9%
Hong Kong	42.9%	57.1%
Thailand	38.6%	61.4%
Australia	36.9%	63.1%
Vietnam	35.9%	64.1%
Taiwan	34.3%	65.7%
Singapore	28.3%	71.7%
Japan	25.0%	75.0%

0% ■ Competent communication departments ■ Other communication departments 100%

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Linking communications to overall strategies and supporting top management is less challenging for excellent communication departments

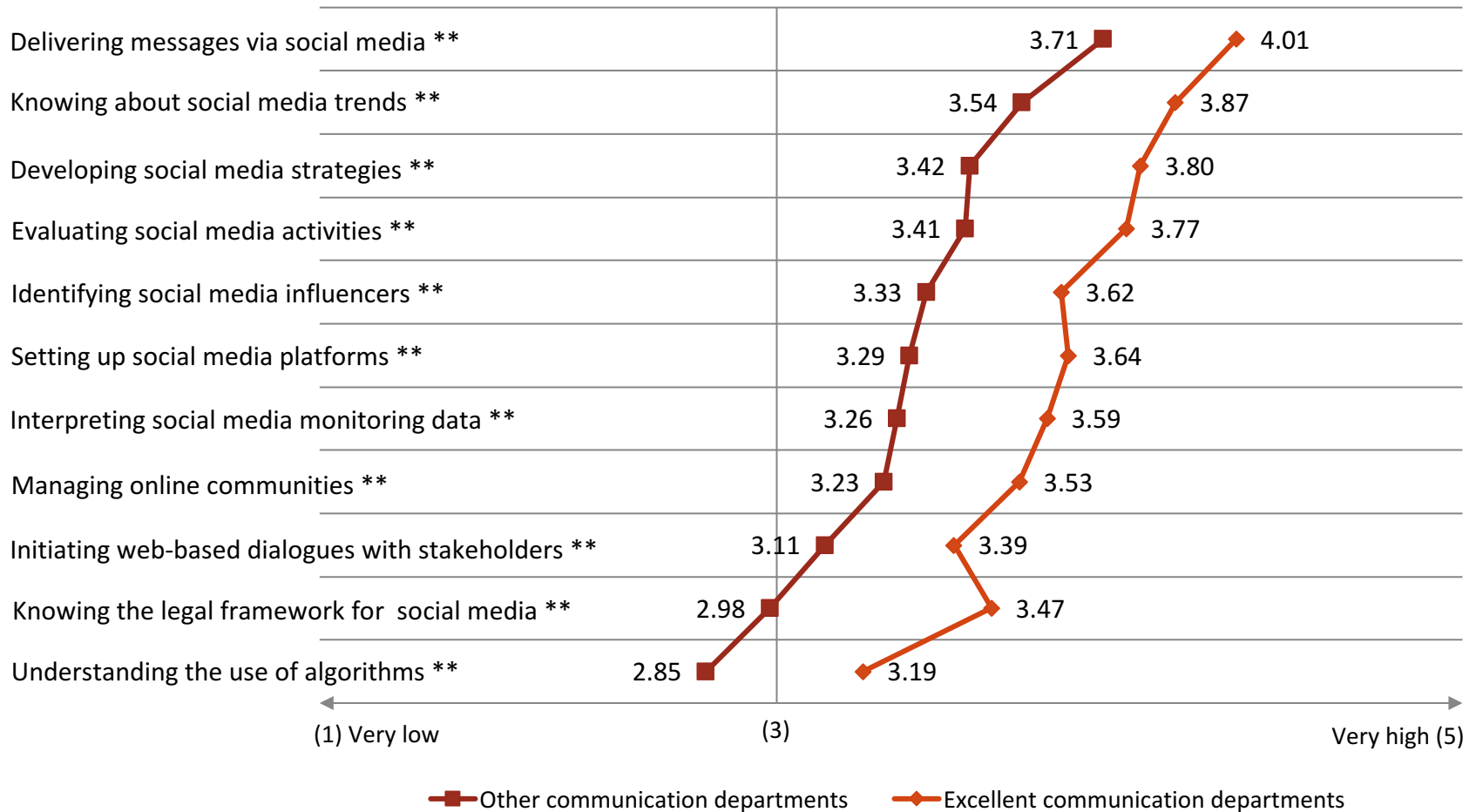*Most important issues for strategic communication until 2020*

Issue	Excellent communication departments	Other communications departments
Coping with the digital evolution and the social web	50.5%	48.1%
Matching the need to address more audiences and channels with limited resources	32.1%	35.0%
Dealing with the speed and volume of information flow	35.2%	33.5%
Enable, coach and advise senior manager(s) and other staff	31.6%	30.7%
Building and maintaining trust	33.2%	31.7%
Linking business strategy and communication	24.0%	29.5%
Using big data and/or algorithms for communication	26.5%	19.8%
Dealing with the demand for more transparency and active audiences	30.1%	25.8%
Dealing with sustainable development and social responsibility	6.6%	8.9%
Strengthening the role of the communication function in supporting top-management decision making	8.2%	15.0%
Explaining the value of communication to top executives	21.9%	22.0%

■ Excellent communication departments

■ Other communications departments

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 928 communication professionals in communication departments. Q 1: Which issues will be most important for communication management/PR within the next three years from your point of view! Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Excellent communication departments are better at identifying and engaging with social media influencers

SMIs are important for our strategic communication activities **   ■ 3.67   ◆ 3.97

We use specific strategies to communicate with SMIs **   ■ 3.04   ◆ 3.58

We have a specific approach to identify SMIs **   ■ 3.06   ◆ 3.53

(1) Strongly disagree   (3)   Totally agree (5)

■— Other communication departments   ◆— Excellent communication departments
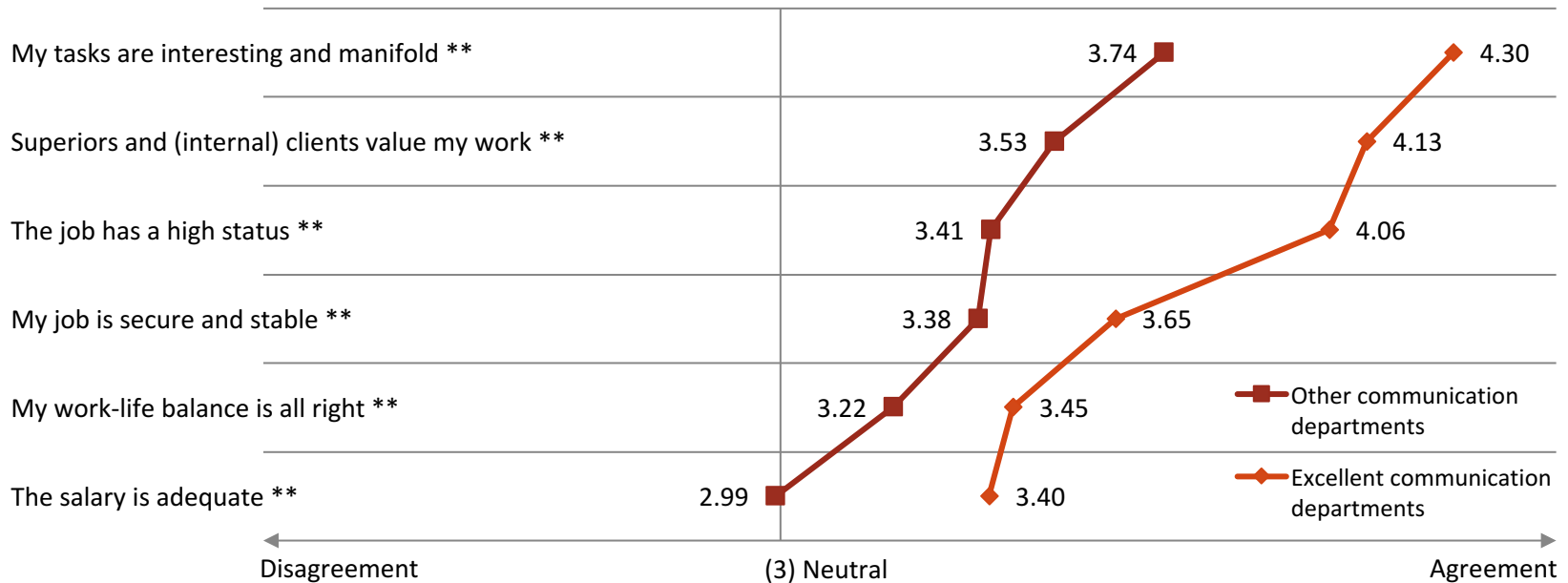
www.communicationmonitor.asia / Macnamara et al. 2017 / n = 928 communication professionals in communication departments. Q 3: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Excellent communication departments employ practitioners with better social media capabilities

	Other communication departments	Excellent communication departments
Delivering messages via social media **	3.71	4.01
Knowing about social media trends **	3.54	3.87
Developing social media strategies **	3.42	3.80
Evaluating social media activities **	3.41	3.77
Identifying social media influencers **	3.33	3.62
Setting up social media platforms **	3.29	3.64
Interpreting social media monitoring data **	3.26	3.59
Managing online communities **	3.23	3.53
Initiating web-based dialogues with stakeholders **	3.11	3.39
Knowing the legal framework for social media **	2.98	3.47
Understanding the use of algorithms **	2.85	3.19

(1) Very low   (3)   Very high (5)
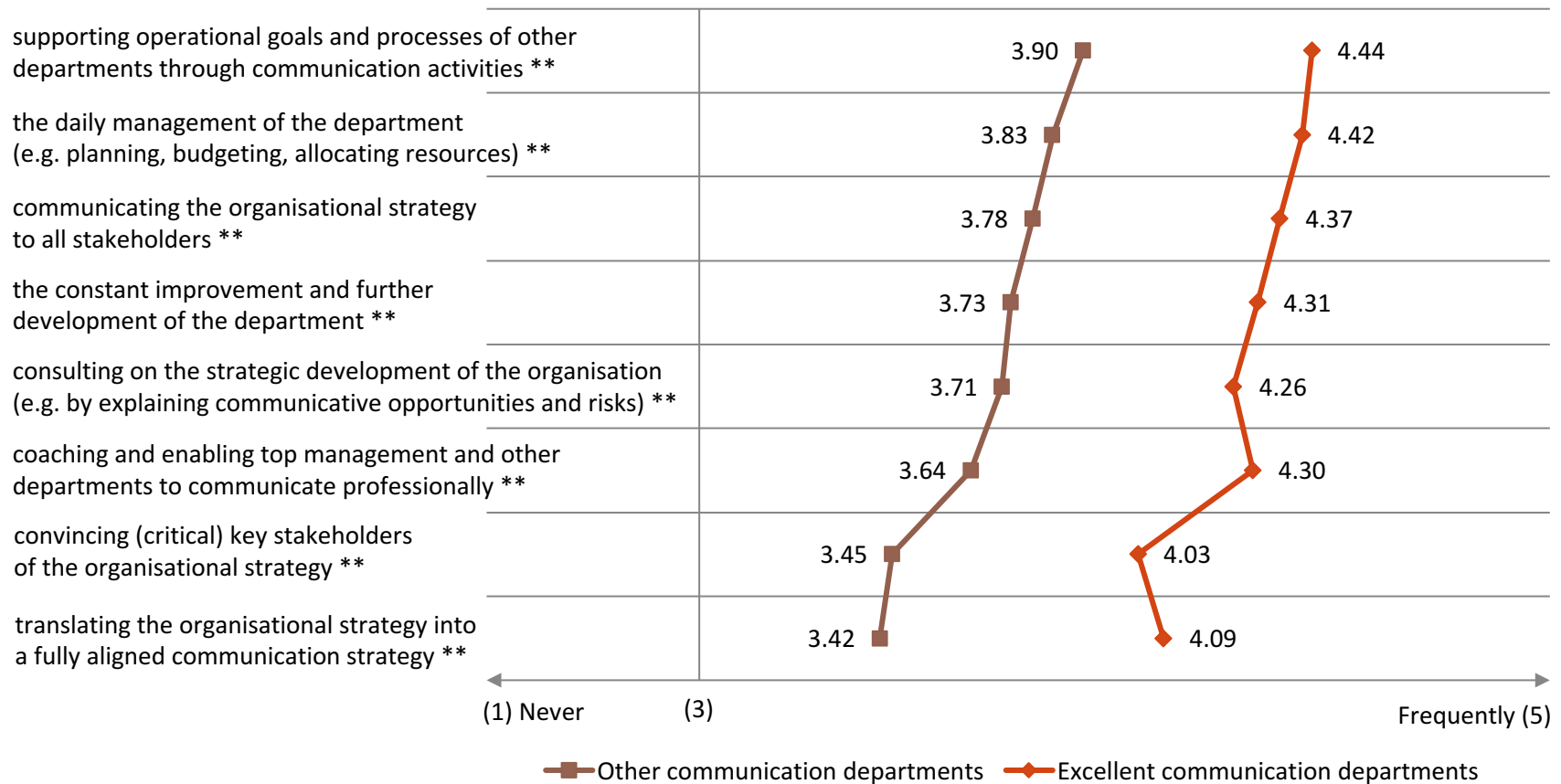
— Other communication departments   — Excellent communication departments

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 928 communication professionals in communication departments. Q 5: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

The staff of excellent communication departments has better management skills

	Other communication departments	Excellent communication departments
Manage relationships **	4.04	4.38
Plan activities **	4.05	4.34
Lead people and groups **	3.99	4.37
Strategic positioning **	3.95	4.33
Control **	3.79	4.15
Manage information **	3.78	4.03
Establish structures and processes **	3.71	4.10
Manage human resources **	3.71	4.07
Manage financial resources **	3.59	4.03

(1) Very low   (3)   Very high (5)

— Other communication departments   — Excellent communication departments

Excellent communication departments invest significantly more in staff training, especially in the areas of management and business

Training offered/facilitated by organisations for …

Technical knowledge *
- Excellent communication departments: 21.9%
- Other communication departments: 15.3%

Technical skills
- Excellent communication departments: 23.0%
- Other communication departments: 20.4%

Business knowledge **
- Excellent communication departments: 49.5%
- Other communication departments: 35.7%

Business skills **
- Excellent communication departments: 46.9%
- Other communication departments: 35.7%

Management knowledge **
- Excellent communication departments: 43.4%
- Other communication departments: 24.5%

Management skills *
- Excellent communication departments: 67.9%
- Other communication departments: 50.7%

Communication knowledge **
- Excellent communication departments: 40.8%
- Other communication departments: 27.7%

Communication skills *
- Excellent communication departments: 56.6%
- Other communication departments: 48.0%

Legend:
- ■ Excellent communication departments
- ■ Other communication departments

www.communicationmonitor.asia / Macnamara et al. 2017 / n = 928 communication professionals in communication departments. Q 7: Does your organisation already offer training programmes in these fields? Percentages: Frequency based on selection of item. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

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

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

Dimensions of job satisfaction

My tasks are interesting and manifold ** — 3.74 — 4.30

Superiors and (internal) clients value my work ** — 3.53 — 4.13

The job has a high status ** — 3.41 — 4.06

My job is secure and stable ** — 3.38 — 3.65

My work-life balance is all right ** — 3.22 — 3.45

The salary is adequate ** — 2.99 — 3.40

Other communication departments

Excellent communication departments

Disagreement   (3) Neutral   Agreement

Excellent communication departments are more confident that they contribute widely to organisational success

The contribution of the communication department to overall success includes …

	Other communication departments	Excellent communication departments
supporting operational goals and processes of other departments through communication activities **	3.90	4.44
the daily management of the department (e.g. planning, budgeting, allocating resources) **	3.83	4.42
communicating the organisational strategy to all stakeholders **	3.78	4.37
the constant improvement and further development of the department **	3.73	4.31
consulting on the strategic development of the organisation (e.g. by explaining communicative opportunities and risks) **	3.71	4.26
coaching and enabling top management and other departments to communicate professionally **	3.64	4.30
convincing (critical) key stakeholders of the organisational strategy **	3.45	4.03
translating the organisational strategy into a fully aligned communication strategy **	3.42	4.09

(1) Never   (3)   Frequently (5)

— Other communication departments   — Excellent communication departments

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