



ASIA-PACIFIC COMMUNICATION MONITOR

2020/2021

**STRATEGIC ISSUES, COMPETENCY DEVELOPMENT,
ETHICAL CHALLENGES AND GENDER EQUALITY
IN THE COMMUNICATION PROFESSION.
RESULTS OF A SURVEY IN
15 COUNTRIES AND TERRITORIES.**

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STRATEGIC ISSUES, COMPETENCY DEVELOPMENT, ETHICAL CHALLENGES
AND GENDER EQUALITY IN THE COMMUNICATION PROFESSION.
RESULTS OF A SURVEY IN 15 COUNTRIES AND TERRITORIES.

Jim Macnamara, May O. Lwin, Chun-Ju Flora Hung-Baesecke & Ansgar Zerfass

A study organised by the Asia Pacific Association of Communication Directors (APACD) and the European Public Relations Education and Research Association (EUPRERA), partnered with Truescope, Nanyang Technological University, and PProvoke.

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Contact:

Please contact the lead researchers or national research team members in your country if you are interested in presentations, workshops, interviews, or further analyses of the insights presented here. Contacts are listed on pages 94-97.

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Introduction

Welcome to the third Asia-Pacific Communication Monitor. Following its launch in 2015/16 as a bi-annual survey, this study provides valuable understanding of the communication industry in Asia-Pacific today and predictions for its future.

The Asia-Pacific Communication Monitor is part of the global Communication Monitor series that now includes the European Communication Monitor; the North America Communication Monitor; and the Latin America Communication Monitor. In all, the Monitor surveys cover more than 80 countries and territories on five continents and represent the views of more than 6,000 communication professionals, making the collectively the largest study of public communication practices worldwide. The global sample of the Communication Monitor also allows comparison of findings across regions to identify commonalities as well as regional differences in practice. The findings of the Asia-Pacific Communication Monitor 2020 build on those of previous Communication Monitor studies in Asia-Pacific in 2015 (Macnamara, et al., 2015) and 2017 (Macnamara et al., 2017) to show development, trends, and future directions.

The 2020/21 Asia-Pacific Communication Monitor findings are based on responses from 1,155 communication professionals in 15 Asia-Pacific countries and territories representing practices in corporations, governmental and non-profit organisations, and communication agencies.

This report identifies the major strategic issues facing communication professionals in Asia-Pacific; the main communication channels that they use; and the competency of communication professionals to meet the challenges of today and tomorrow; and it explores the socially important issues of ethics and gender equality. Adequately responding to ethical challenges and advancing gender equality are vital to ensure that public communication is socially responsible and contributes to the 'social good', as well as achieving the objectives of organisations.

In this report, you will find some unsurprising trends, such as the continuing use and importance of social media, as well as some surprises and findings that warrant discussion among practitioners and industry associations. For example, while women hold the majority of positions in the field, they still lag in appointment to senior management roles. Also, a 'glass ceiling' is reported more often in government organisations than non-profits, companies, and agencies. Arguably, governments should be more representative of society and committed to social equity.

More than 40% of practitioners reporting facing ethical challenges in their work. In particular, 75% of practitioners are concerned about using bots and big data analysis. With growth in use of data analytics and artificial intelligence (AI), ethical practice in these areas is a matter for close attention in the industry. However, it is concerning that almost one-third of communication professionals in Asia-Pacific have never participated in any ethics training.

The lead researchers and authors of this report believe that practitioners, industry organisations, and trainers and educators will find interesting information and insights in this report.

Introduction

The Asia-Pacific Communication Monitor is organised by an academic research team in cooperation with the Asia-Pacific Association of Communication Directors (APACD) and the European Public Relations Education and Research Association (EUPRERA), which coordinates the Monitor studies globally.

For the 2020/21 Asia-Pacific Communication Monitor, we are very pleased to have Truescope, the first smart media intelligence platform that provides real-time information to clients, as our major partner. Also, we acknowledge and thank PProvoke as our media partner, and Nanyang Technological University as our academic partner. See 'Partners' on page 99 for information about these supporting organisations.

In addition, we extend sincere thanks to an extended research team of academics across the region who supported the core team and ensured that the survey reflects the diversity of the field across Asia-Pacific. The extended research team is listed under 'National contacts' on pages 95-97 of this report.

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

- Distinguished Professor Jim Macnamara
- Professor May O. Lwin
- Dr. Chun-Ju Flora Hung-Baesecke
- Professor 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 15 countries and territories 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 (Zerfass et al., 2020), North America (Meng et al., 2019) and Latin America (Moreno et al., 2019). With more than 80 countries and territories 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 territory of operation); (2) communication professionals (their demographics, role, experience, etc.); (3) the situation in which they operate (challenges, competencies, etc.); (4) the communication department (its role, influence and performance); and (5) perceptions of the future (strategic issues, importance of channels, 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 (Falkheimer & Heide, 2018; Holtzhausen & Zerfass, 2015; Nothhaft et al., 2019) and public relations (Tench & Waddington, 2021; Valentini, 2021) are identified by longitudinal comparisons of strategic issues and communication channels. To this end, questions from previous APCM surveys (Macnamara et al., 2015, 2017) have been repeated. Secondly, regional and national differences are revealed by breaking down the results to 11 key countries and territories. Thirdly, a selection of current challenges in the field are empirically tested. The study identifies the frequency of moral challenges and approaches of coping with them generally (Bivins, 2018, Cheney et al., 2011; Parsons, 2016), as well as ethical aspects of digital communication practices specifically (Barbu, 2014; DiStasio & Bortree, 2014). Additional issues explored are the role of women in communication with a specific look on the glass ceiling hindering female practitioners to reach top positions (Dowling, 2017; Topić et al., 2020) and competency development for communicators (Moreno et al., 2017; Tench & Moreno, 2015). Fourthly, statistical methods are used to identify high performing communication departments in the sample (Tench et al., 2017b; Verčič & Zerfass, 2016), and there define which aspects make a difference.

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 of the Asia-Pacific Communication Monitor 2020/21 consisted of 32 questions. Five of these questions were only presented to professionals working in communication departments. Instruments used dichotomous, nominal, ordinal and numeric scaling. They were based on research questions and hypotheses derived from previous research and literature. The survey was available in English and Chinese and was activated from September to November 2020. Communication practitioners were invited by e-mail from national research collaborators and professional associations. In addition, e-mail invitations were issued based on a database from the previous APCM editions and another provided by the Asia-Pacific Association of Communication Directors (APACD). The invitations were further publicised by PProvoke Media.

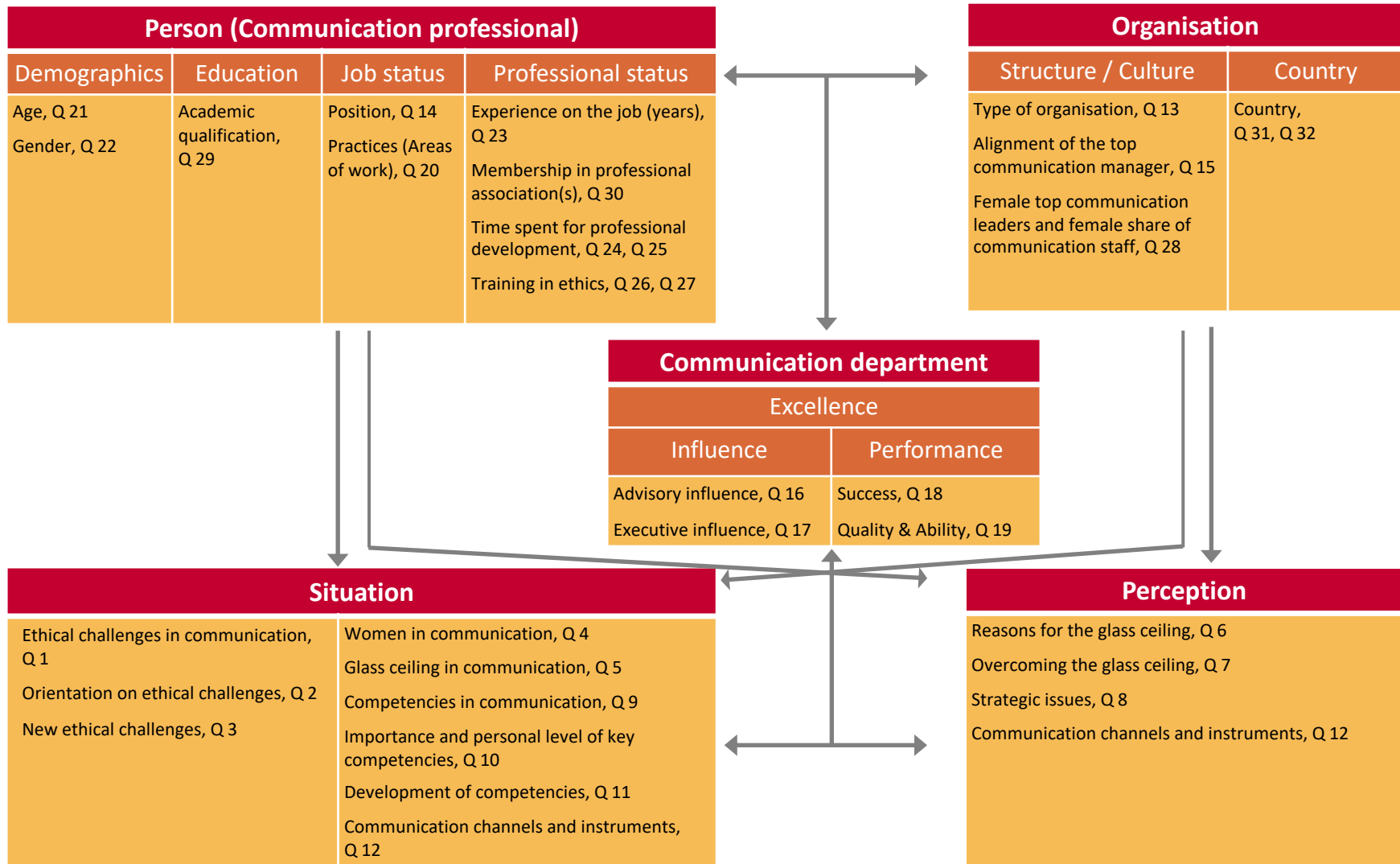
In total 2,306 respondents started the survey and 1,236 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the APCM and sets it apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation presented in this report is based on 1,155 fully completed replies by communication professionals.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results have been tested for statistical significance with, depending on the variable, Chi², ANOVA / Scheffé Post-hoc-Test, independent samples T-Test, Pearson correlation, Kendall rank correlation or Mann-Whitney U Test. The applied methods are reported in the footnotes. Significant results are marked with * ($p \leq 0.05$, significant) or ** ($p \leq 0.01$, highly significant) in the graphics or tables and also mentioned in the footnotes.

The demographics reveal the high quality of the sample, which is dominated by senior professionals with a sound qualification and a long tenure in the field. The average age is 39.2 years. Two out of three respondents are communication leaders: 23.1 per cent hold a top hierarchical position as head of communication in an organisation or as chief executive officer of a communication consultancy; 34 per cent are unit leaders or in charge of a single discipline in a communication department. 50.7 per cent of the professionals interviewed have more than ten years of experience in communication management. 64.1 per cent of all respondents are female and a vast majority (96.6 per cent) in the sample has an academic degree, half of them even a graduate degree or doctorate (45.1 per cent).

Six out of ten respondents work in communication departments in organisations (joint stock companies, 18.4 per cent; private companies, 19.5 per cent; government-owned, public sector, political organisations, 17.7 per cent; non-profit organisations, associations, 5 per cent), while 39.4 per cent are communication consultants working freelance or for agencies. Communication professionals from 15 different countries and territories participated in the survey. Detailed insights were calculated for 11 key markets.

Research framework and questions



Demographic background of participants

Position

Head of communication, Agency CEO	23.1%
Unit leader, Team leader	34.0%
Team member, Consultant	35.4%
Other	7.4%

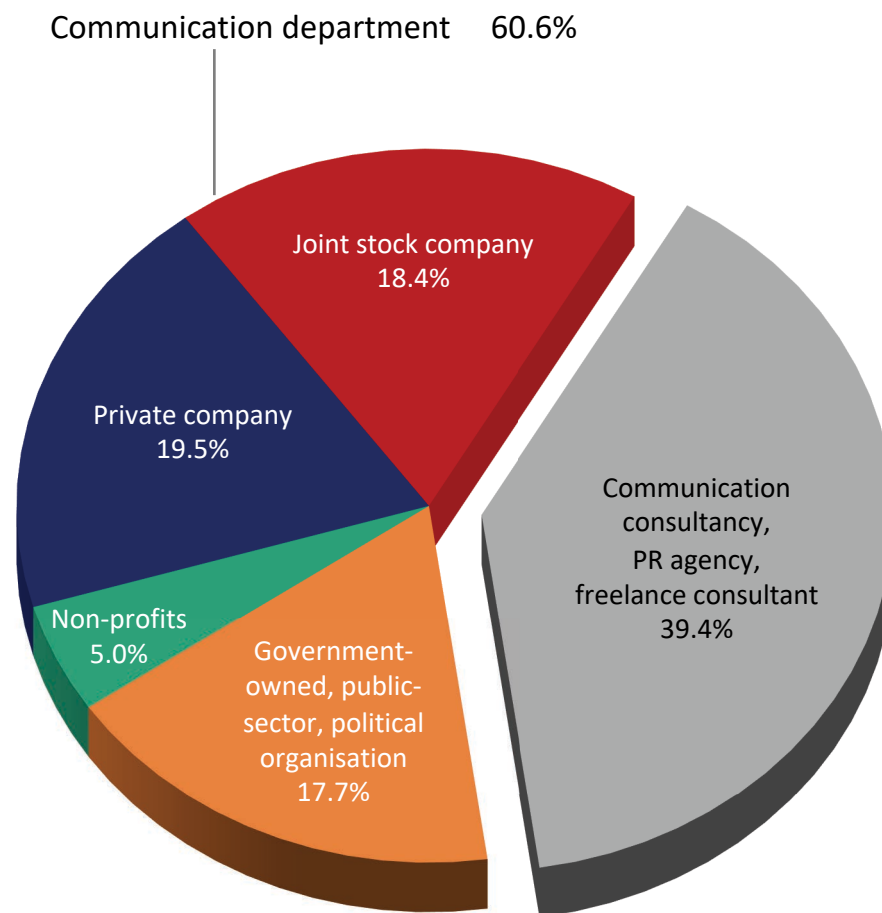
Job experience

More than 10 years	50.7%
6 to 10 years	18.8%
Up to 5 years	30.5%

Alignment of the communication function

Strongly aligned communication department	20.6%
Aligned communication department	61.4%
Weakly aligned communication department	18.0%

Organisation



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,155 communication professionals. Q 13: Where do you work? Q 14: What is your position? Q 23: How many years of experience do you have in communication management/PR? Alignment: n = 699 communication professionals working in communication departments. Q 15: Within your organisation, the top communication manager or chief communication officer is a member of the executive board / reports directly to the CEO or highest decision-maker on the executive board / does not report directly to the CEO or highest decision-maker.

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Unit leader, Team leader	Team member, Consultant
Female	64.1%	57.9%	62.2%	69.6%
Male	35.9%	42.1%	37.8%	30.4%
Age (on average)	39.2 years	47.3 years	39.7 years	33.8 years

Membership in a professional association

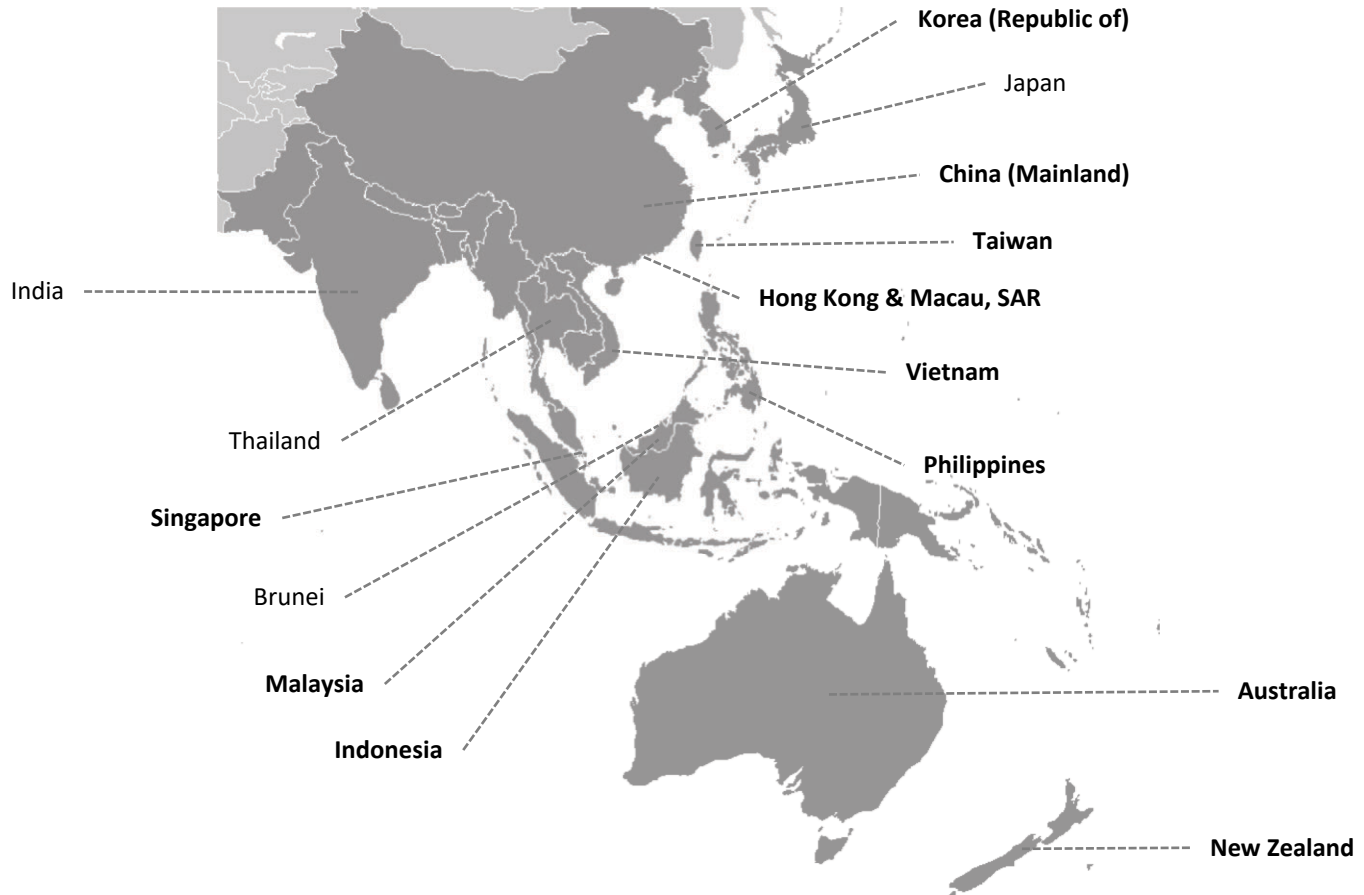
Asia-Pacific Association of Communication Directors (APACD)	4.6%
Other international communication association	15.8%
National PR or communication association	34.1%

*Highest academic educational qualification**

Doctorate (Ph.D., Dr.)	6.9%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	38.2%
Bachelor (B.A., B.Sc.)	48.0%
Polytechnical / technical diploma	3.5%

Countries and territories represented in the study

Respondents are based in 15 countries and territories in Asia-Pacific



Strategic issues
and communication
channels



Strategic issues and communication channels

Coping with the digital evolution and the social web continues to be the major strategic issue and challenge facing communication practitioners in Asia-Pacific, although the percentage of professionals rating this highest (38.1%) has declined since 2015 when 53.1% rated this the most important strategic issue. This signals that practitioners are coming to grips with digital technology and social media.

However, using ‘big data’ and algorithms has increased as a strategic concern and focus.

Also, building and maintaining trust has become the third highest rated strategic issue, after being ranked seventh in 2017. This is undoubtedly a response to global concerns about disinformation (Bennett & Livingston, 2018) and the reported emergence of *post-truth* society (Kavanagh & Rich, 2018; McIntyre, 2019). Surprisingly, building and maintaining trust is rated highest by companies (37.3% of practitioners) along with non-profit organisations (41.4% of practitioners), with less concern among government communication professionals (33.3%). This, and high levels of focus among government communicators on coping with the digital evolution and social web; using big data and algorithms; and dealing with the speed and volume of information flow; suggest government priority on dissemination of information rather than engagement and two-way communication.

Dealing with sustainable development and social responsibility has increased most as a strategic concern, with almost 30% of all practitioners rating this a high priority in 2020 compared with just 19.3% in 2015. This finding is appropriate and encouraging, given the warning by social scientists such as Couldry and Mejias (2019) that new information and communication technologies (ICTs) are being widely used to deceive and manipulate people. A recent extensive global study found that many public relations and corporate and marketing communication professionals are participants in disinformation, deception, and manipulation of citizens through practices such as paid influencers and sponsored content (Macnamara, 2020). An analysis of attitudes towards artificial intelligence (AI) by Bourne (2019) described public relations practitioners as “cheerleaders” without adequate concern for ethics and consumer protection. Thus, increased focus on social responsibility is timely.

Linking communication to business strategy, the second highest rated strategic issue in 2017, has declined in focus, to be rated seventh in 2020. However, this may be the result of the increase in other strategic concerns, rather than declining importance.

The shift to social media and mobile communication has not been as significant as predicted in 2017. Rather, the use of social media has grown steadily, and use of mobile communication such as mobile web and phone and tablet apps has remained stable.

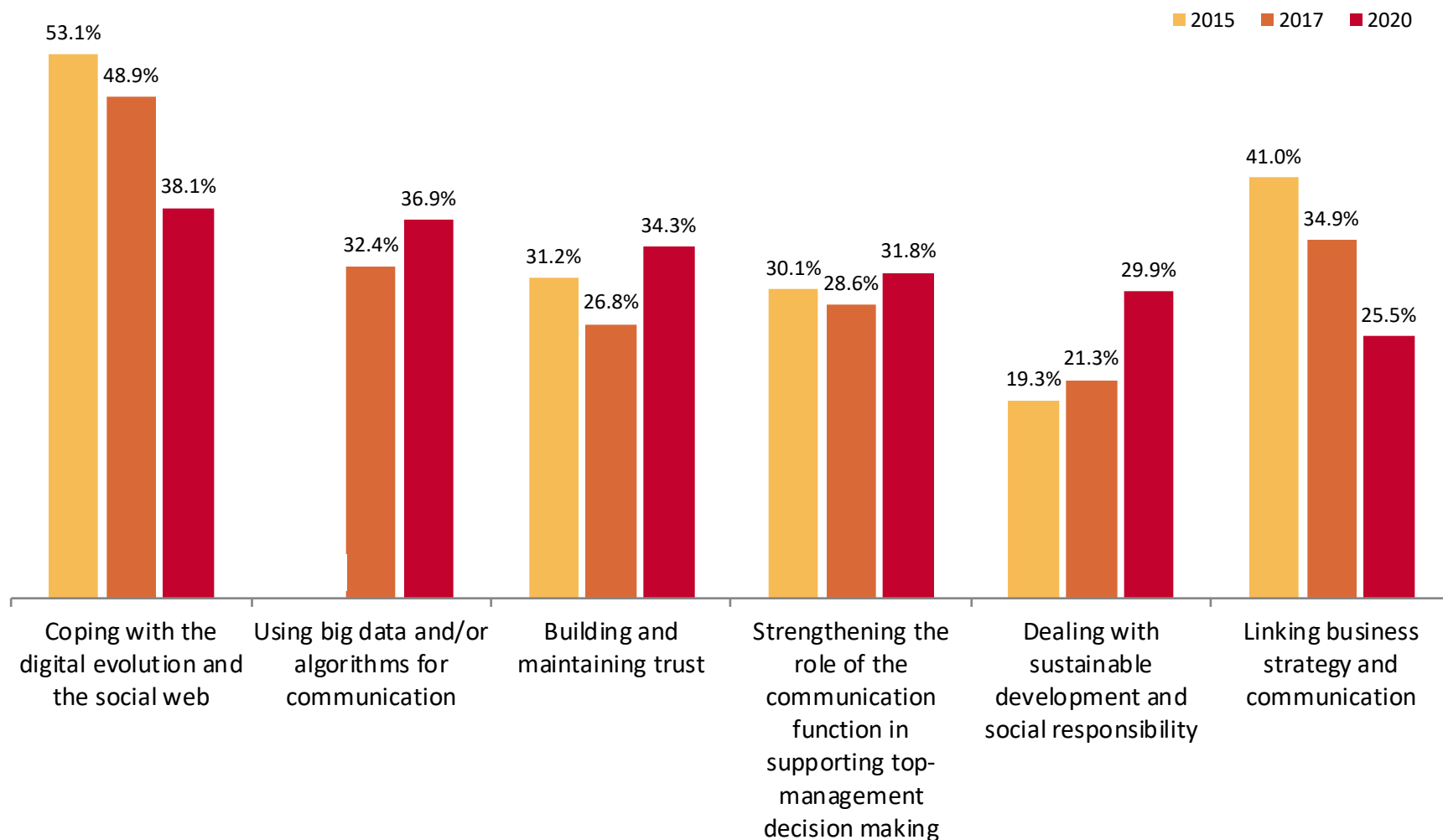
Contrary to predictions of the ‘end of newspapers’ (Meyer, 1994), press and media relations remains a major activity, with only a small decline since 2017—albeit the focus is now online newspapers. More than 80% of practitioners continue to rate press and media relations as important.

Looking ahead to 2023, practitioners in Asia-Pacific see continuing growth in the importance and use of social media and mobile communication, and stable patterns in use of websites, with continuing gradual decline in online as well as print newspapers, radio, TV, and events.

Most important strategic issues for communication management until 2023

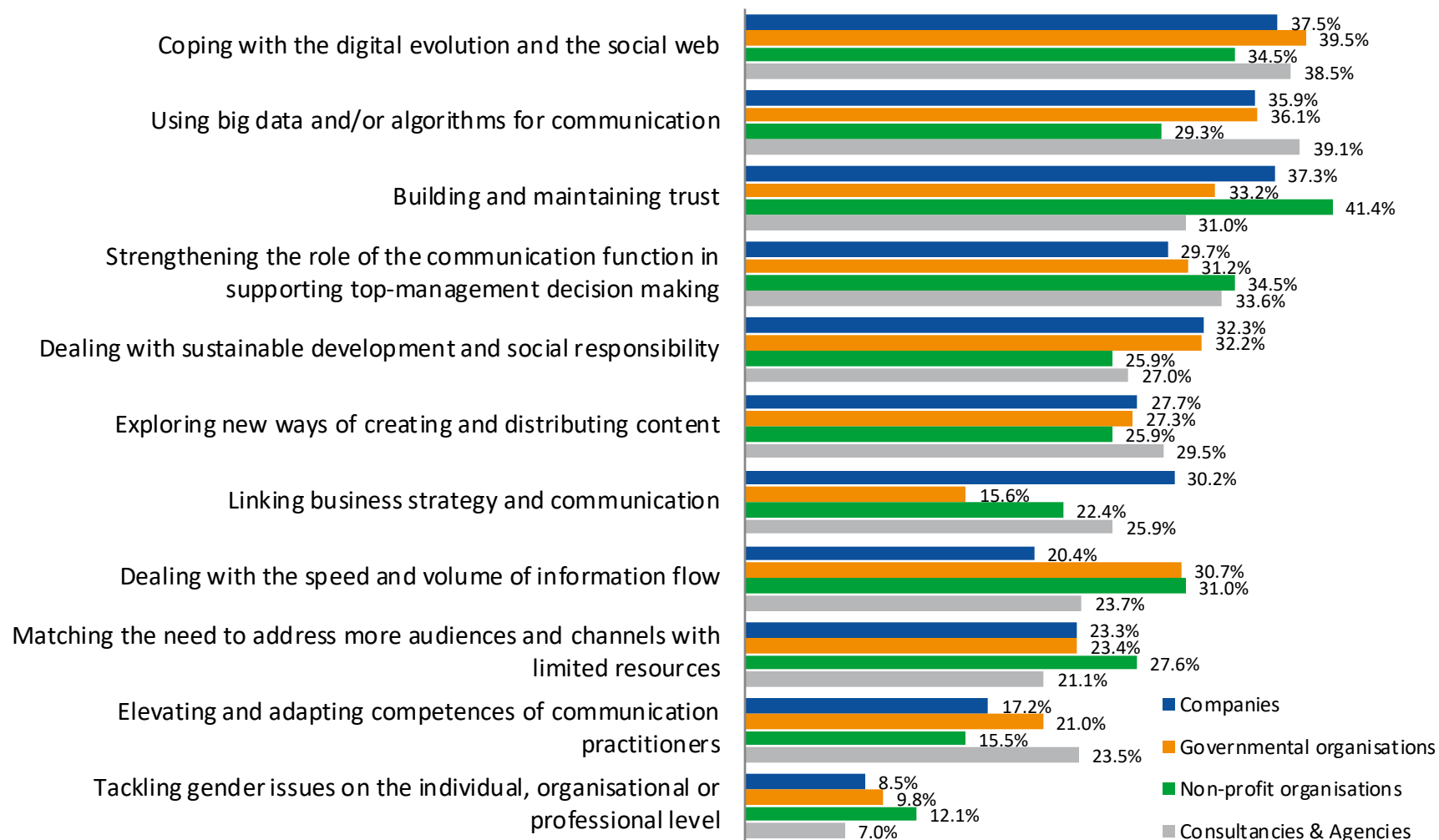


Long-term development of strategic issues for communication management



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,155 communication professionals (Q 8); Macnamara et al. 2017 / n = 1,306 (Q 1) / Macnamara et al. 2015 / n = 1,200 (Q 3). Q: 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.

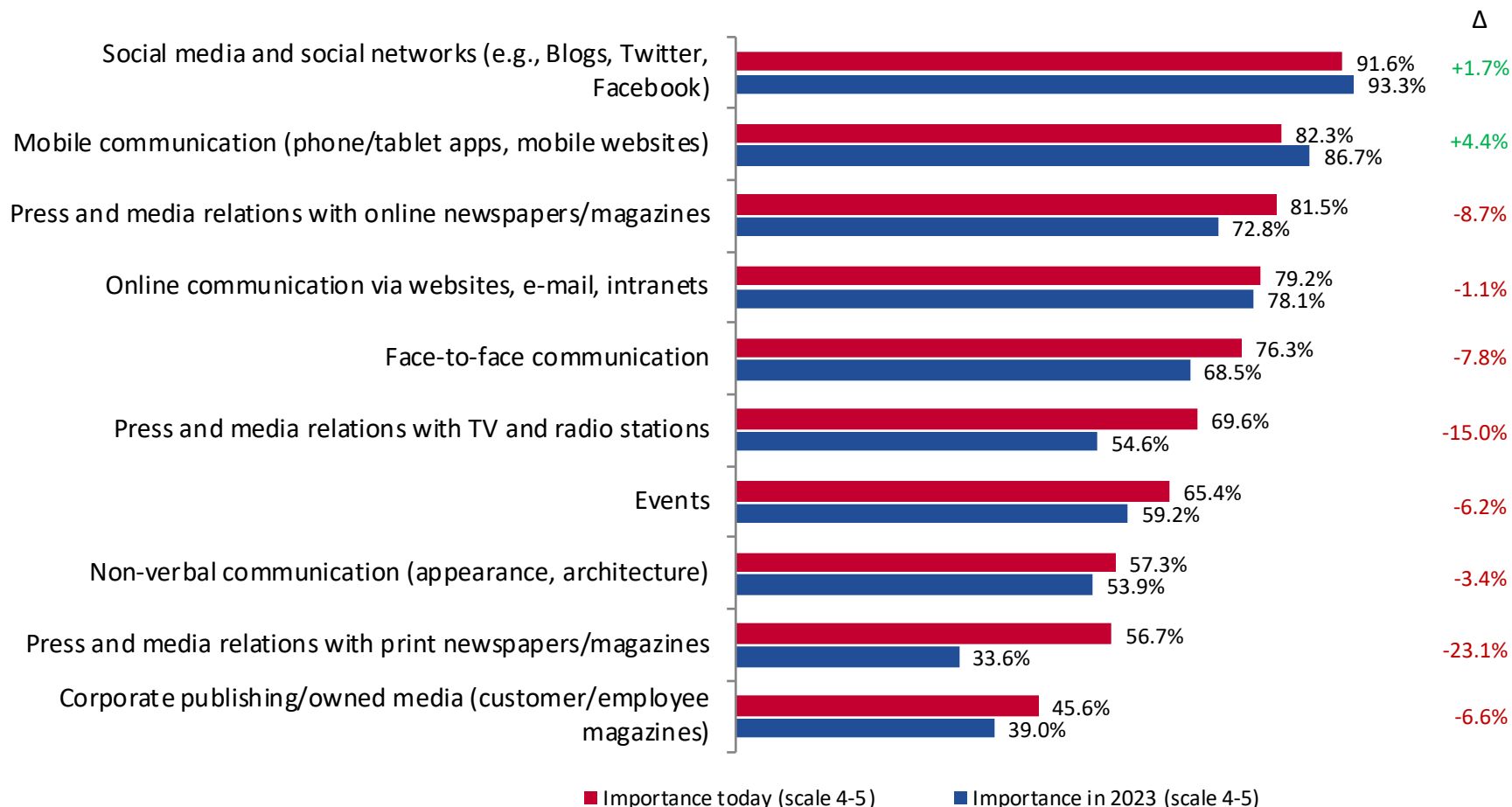
Relevance of strategic issues differs between types of organisations



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,155 communication professionals. Q8: 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.

Importance of communication channels and methods today and in the future: Mobile communication is advancing fast; media relations is on the downturn

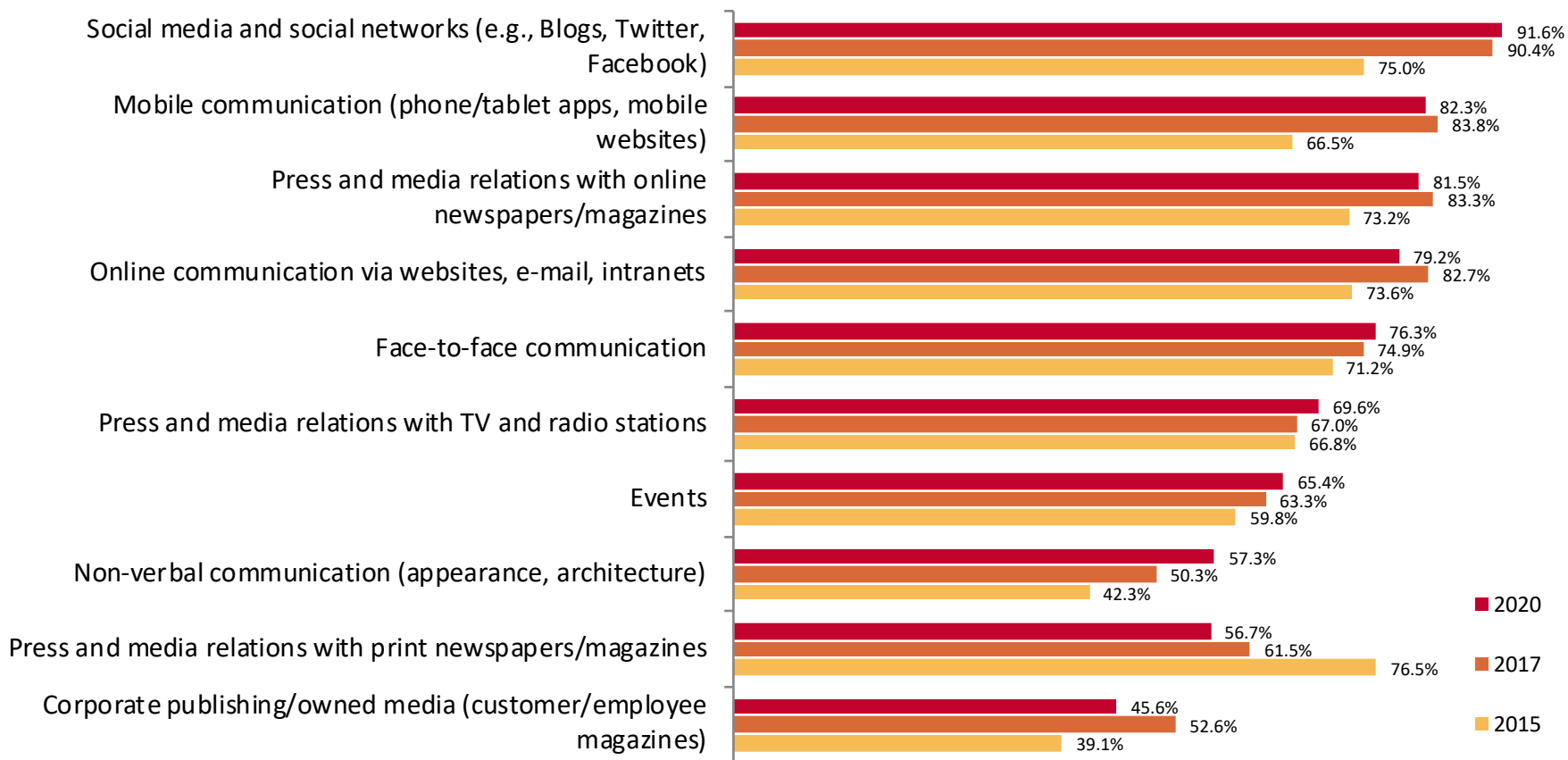
Perceived importance for addressing stakeholders, gatekeepers and audiences in 2020 and in 2023



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,149 communication professionals. Q 12: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5.

Longitudinal analysis: Social media has clearly gained in importance, while media relations with print newspapers and magazines are rapidly declining

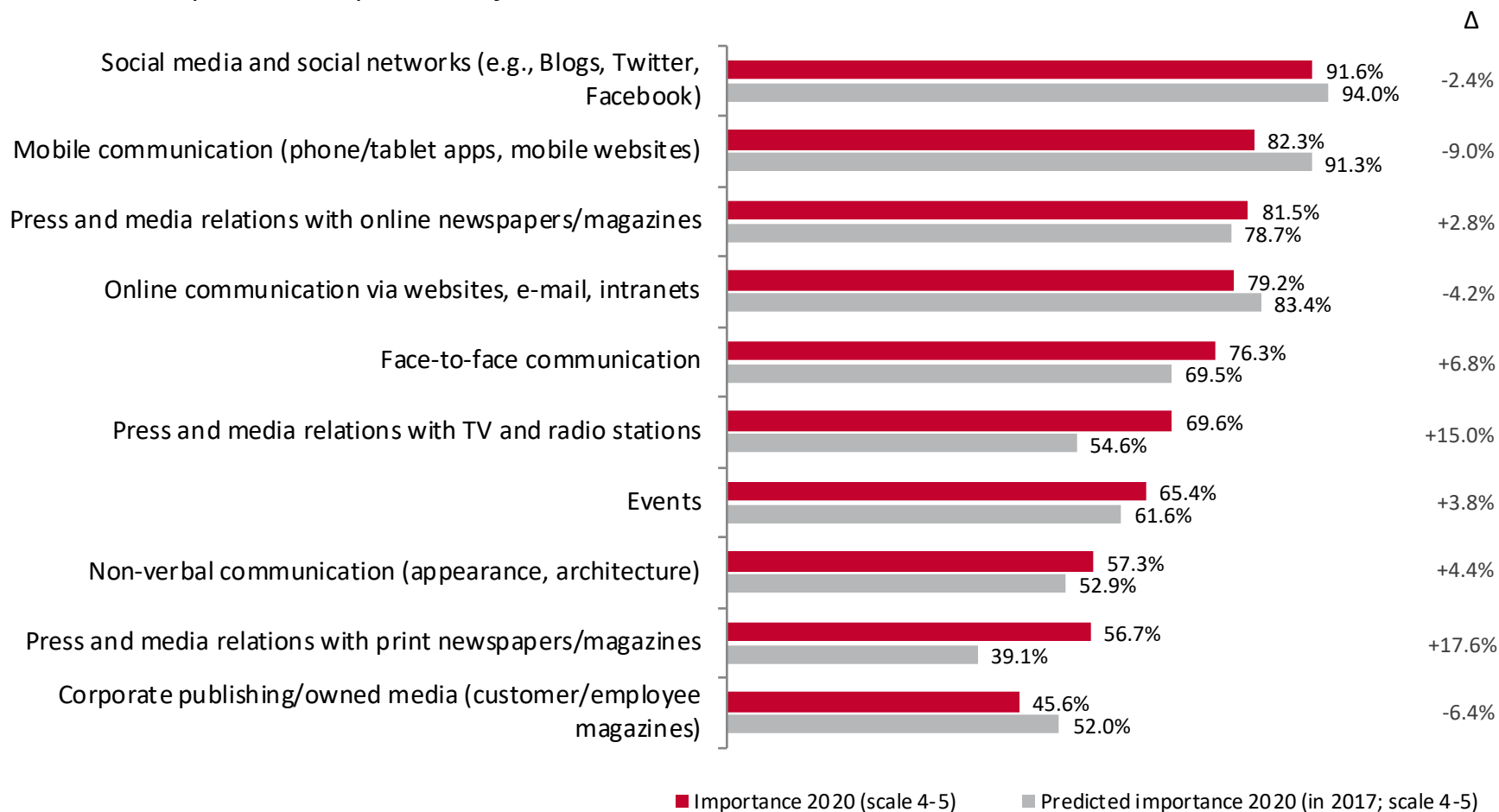
Perceived importance of communication channels for addressing stakeholders, gatekeepers and audiences



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,149 communication professionals (Q 12); Macnamara et al. 2017 / n ≥ 1,280 (Q2); Macnamara et al. 2015 / n ≥ 1,148 (Q 4). Q: You are almost done – one last question before we move on to the background and socio-demographics! How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5.

Shift towards social media and mobile communication has not been as strong as estimated in previous studies – and press relations is still better off

Perceived and predicted importance of communication channels and instruments in 2020



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,149 communication professionals (Q 12); Macnamara et al. 2017 / n ≥ 1,274 (Q2).

Q: You are almost done – one last question before we move on to the background and socio-demographics! How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5.

Competency development:
Status quo and
future needs



Competency development: Status quo and future needs

Communication competence has been widely discussed in European communication literature (e.g., Tench et al., 2013, 2015) and in the Global Capability Framework produced by the Global Alliance for Public Relations and Communication Management (Gregory & Fawkes, 2019). Tench and Moreno (2015) contend that knowledge, skills and personal attributes (KSAs) constitute the broad competencies in communication departments. Gregory (2008) defined competencies as “behavioral sets or sets of behaviors that support the attainment of organisational objectives. How knowledge and skills are used in performance” (p. 216). Integrating different definitions, Tench and Moreno (2015) described competencies as “the mix of skills and knowledge held by a practitioner, which combine with personal attributes to produce effective professional behaviors” (p. 44).

Examination of communication competence in Asia-Pacific shows significant gaps, with four out of five practitioners acknowledging a need to increase competencies. Recognition of this need is highest in Hong Kong and Macau (SAR) (85.5%); the Philippines (85.3%); Korea (84.1%); Singapore (83.0%); Australia (82.9%); Taiwan (81.7%); New Zealand (81.6%); and Malaysia (80.7%). Similar to 2020 European Communication Monitor findings, seasoned and experienced communication professionals in the Asia Pacific region are more aware of the need to develop competence, while almost 25% of young practitioners did not acknowledge a strong need to do so.

While acknowledging a need for competencies, there are large gaps between perceived importance of particular competencies and current competency levels. The largest discrepancy can be found in data competence, where 77.6% of practitioners consider data competence to be important, but only 45.1% of practitioners report having high competence. Similarly, even though 75.0% of practitioners consider technology competence to be important, only 46.6% stated they have high levels of competence in relation to technology.

Communication leaders are more confident than their subordinates in communication, management, and business, which is consistent with their counterparts in Europe. However, in terms of technology and data competence, there is no difference across seniority levels. Male practitioners reported significantly higher competence in business, technology, and data than female practitioners. In terms of age, senior practitioners reported being more confident in business, management, communication, and data, as could be expected.

Closing the competence gap requires investment of more time in education and training (Moreno, et al., 2017). When it comes to how practitioners should improve their competencies, nine in ten Asia-Pacific practitioners consider this a personal responsibility (87.7%) and a responsibility of their employer organisations (87.1%)—although three-quarters also believe professional associations should play a role.

Across the region, communication professionals have completed an average of 22 training days per year in 2020, with almost half of those taking place in the practitioner’s free time (weekends, holidays or evenings). Personal development time is highest for those working in non-profit organisations, and lowest among those working in joint stock companies. Differences exist between practitioner age groups, with younger professionals (29 years or younger) investing more than seven weeks of work and leisure time a year in professional development, compared to only 15.8 days a year for those aged 50–59.

Competency development in the communication profession: Almost four out of five practitioners in Asia-Pacific see a need for improvement



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,155 communication professionals. Q9: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfil their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies).

A competencies gap: Practitioners across the region acknowledge the need to improve competencies

Australia	China (Mainland)	Hong Kong & Macau, SAR	Indonesia	Korea	Malaysia	New Zealand	Philippines	Singapore	Taiwan	Vietnam
57.1%	42.9%	48.7%	38.7%	50.8%	46.8%	46.9%	43.1%	50.0%	54.8%	49.5%

“Competencies are heavily discussed in the communication profession in my country.”

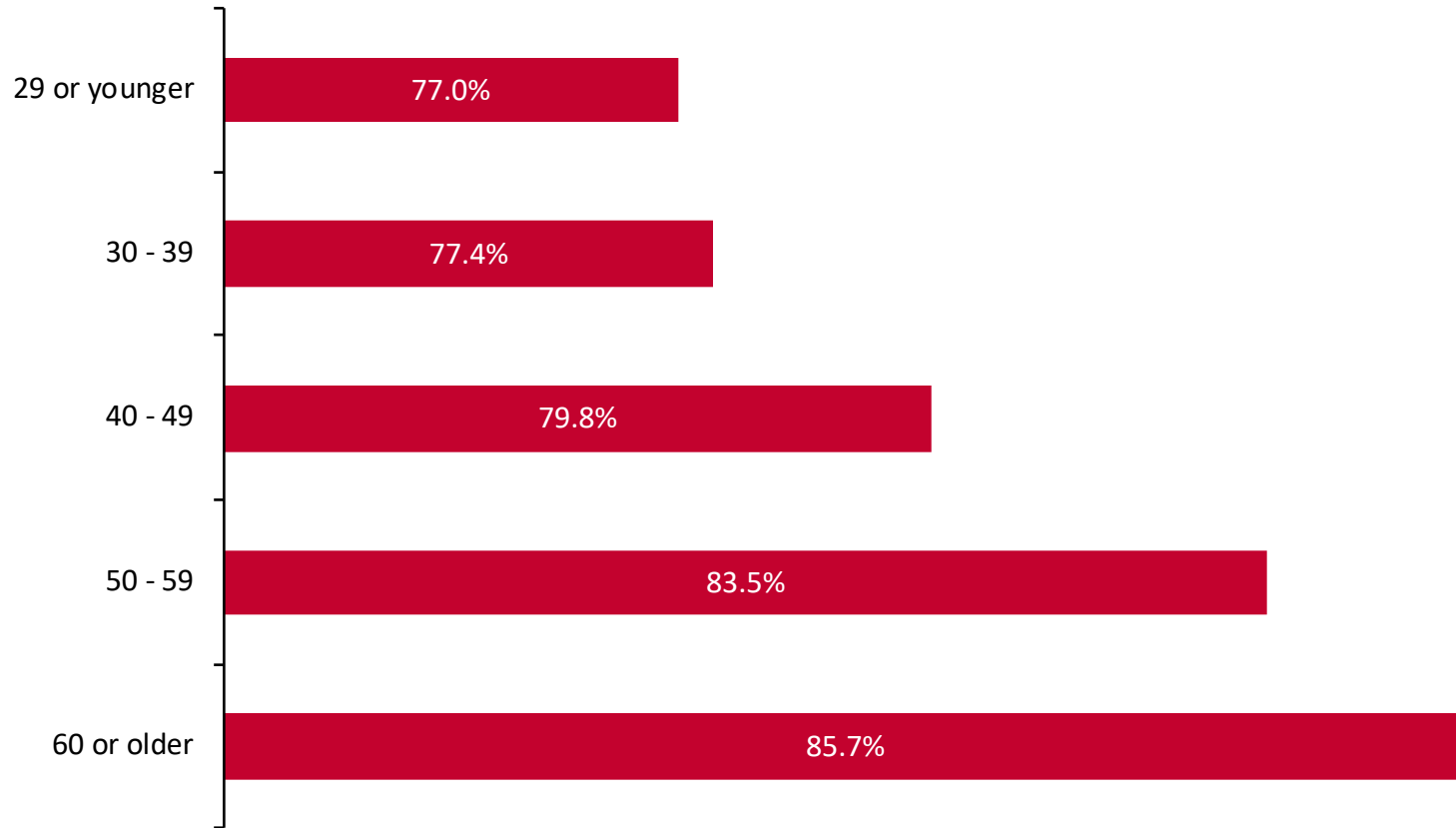
“There is a great need for communication practitioners to develop their competencies.”

82.9%	72.9%	85.5%	69.4%	84.1%	80.7%	81.6%	85.3%	83.0%	81.7%	71.8%
Australia	China (Mainland)	Hong Kong & Macau, SAR	Indonesia	Korea	Malaysia	New Zealand	Philippines	Singapore	Taiwan	Vietnam

www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,122 communication professionals from 11 countries and territories. Q9: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfil their tasks. How do you assess the current situation regarding competencies in communication? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies). Frequency based on scale points 4-5.

Seasoned communication professionals are more aware of the need to advance knowledge and skills

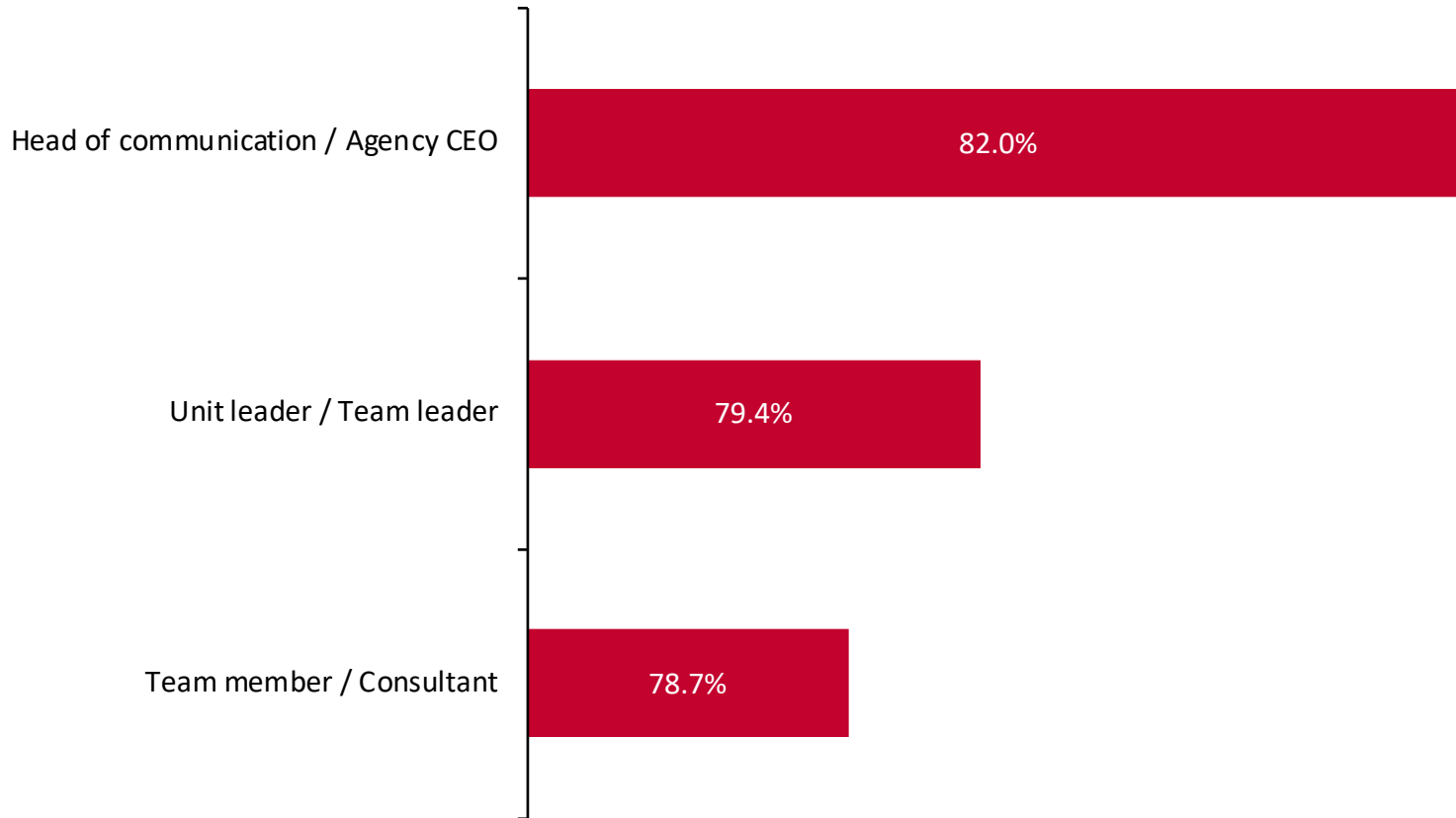
Much or great need to develop competencies



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,155 communication professionals. Q9: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfil their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies). Frequency based on scale points 4-5.

Communication leaders stress the need for constant professional development more than practitioners at lower levels

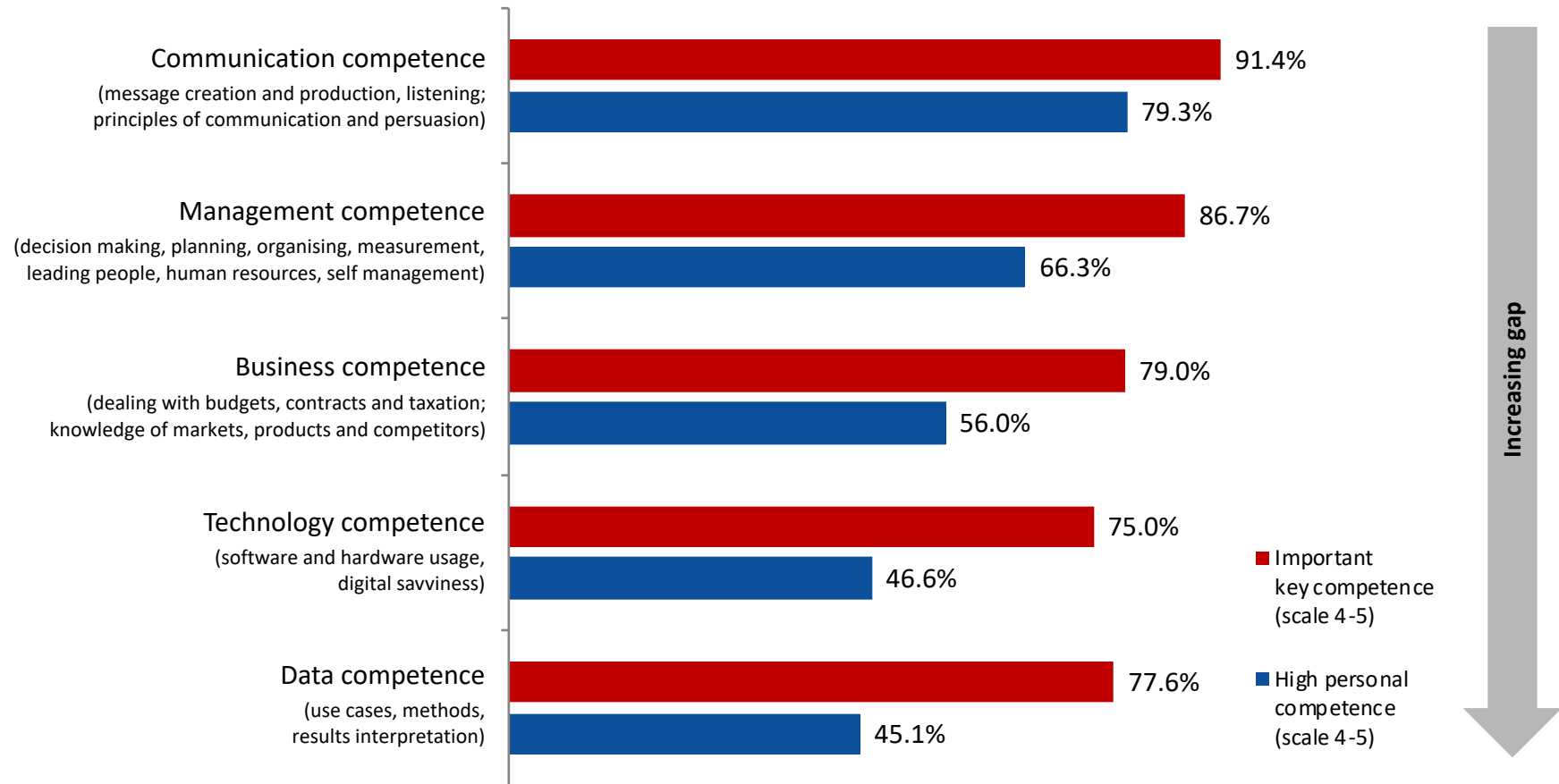
Much or great need to develop competencies



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,069 communication professionals. Q9: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfil their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies). Frequency based on scale points 4-5.

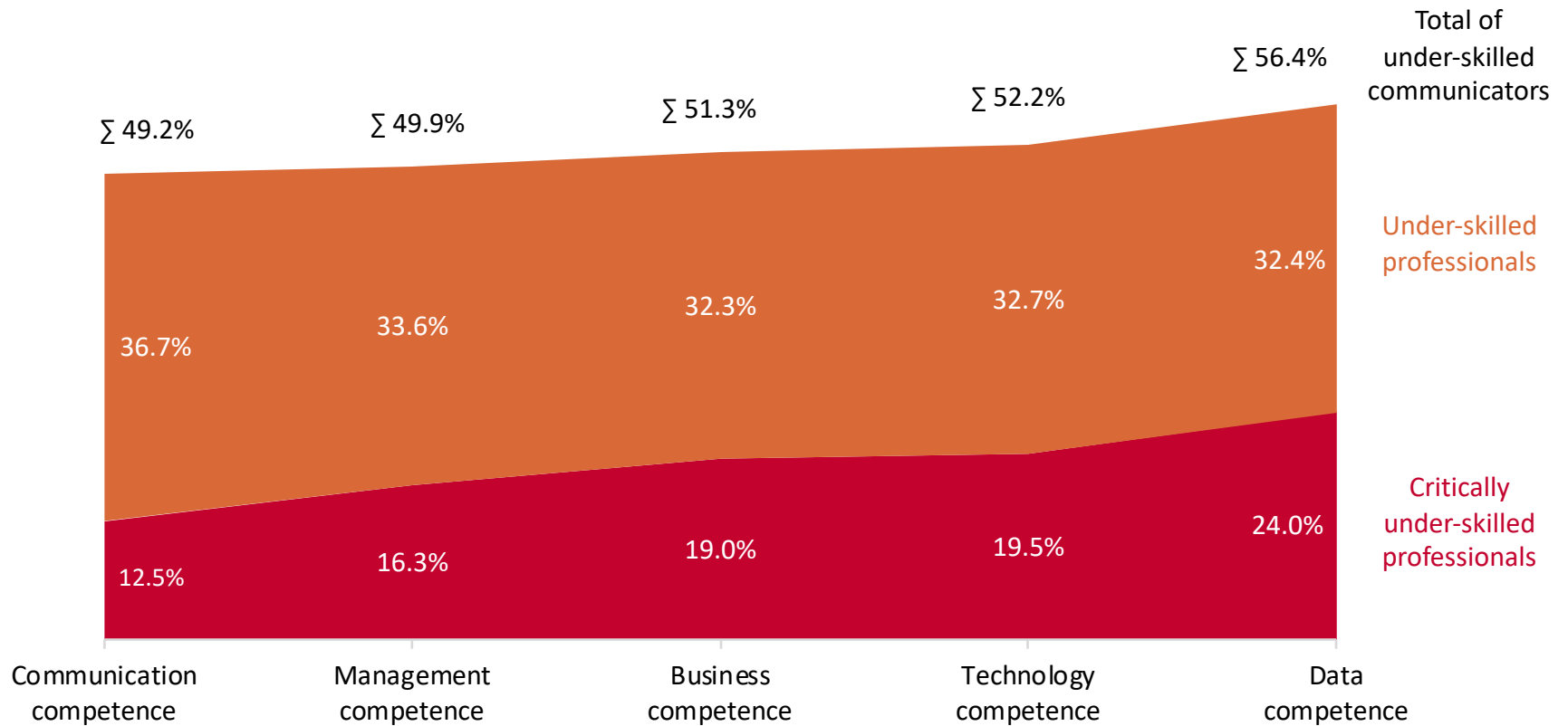
Large gaps between perceived importance and personal competence

Importance of competencies vs. personal assessment of competencies by practitioners



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,145 communication professionals. Q.10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Frequency based on scale points 4-5.

A closer look at competency gaps: Largest share of under-skilled communicators in the fields of technology and data



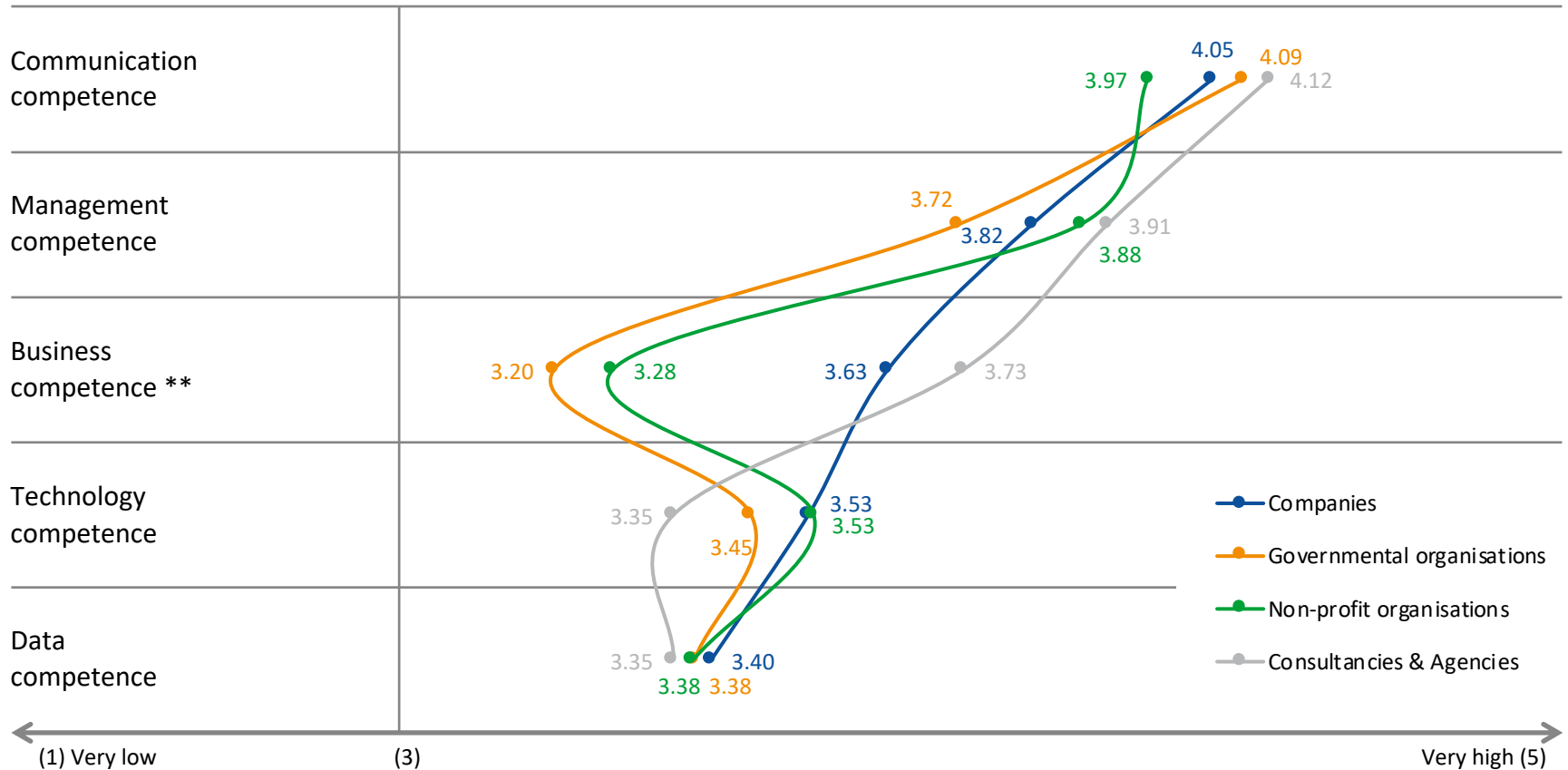
How the number of under-skilled professionals has been calculated

Under-skilled professionals = those who perceive the importance of a competence 1 scale point higher than their personal level (e. g. importance = 5 “very high”, but personal level = 4 “above average”). Critically under-skilled professionals = those who perceive the importance of a competence 2 or more scale points higher than their personal level (e. g. importance = 4 „above average”, but personal level = 2 “below average”).

www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,145 communication professionals. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high).

Practitioners working in governmental and non-profits organisations rate their business competencies lower than other sectors

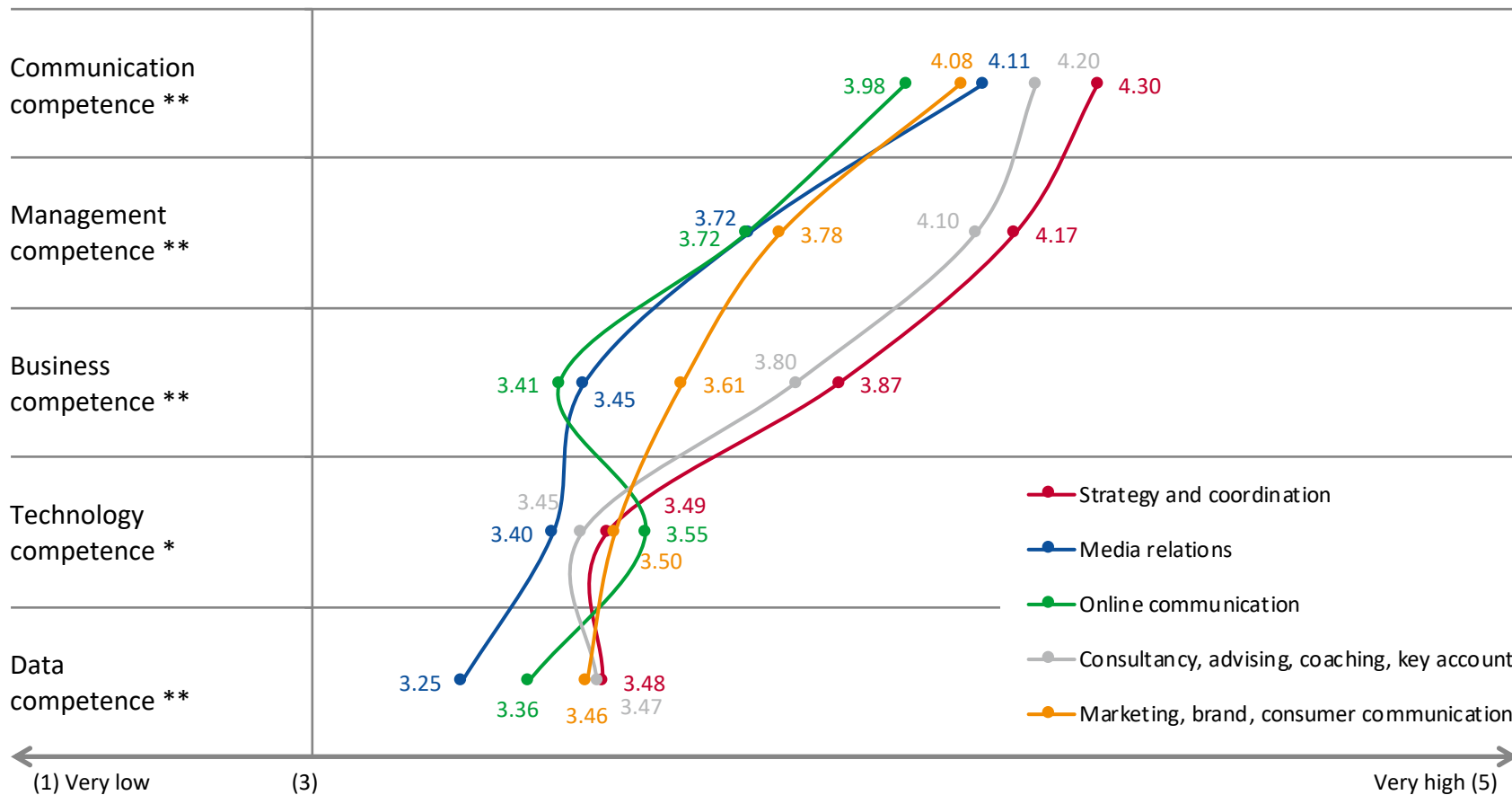
Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,145 communication professionals. Q.10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Communication competence strong, but practitioners need to increase competencies in data, technology and business

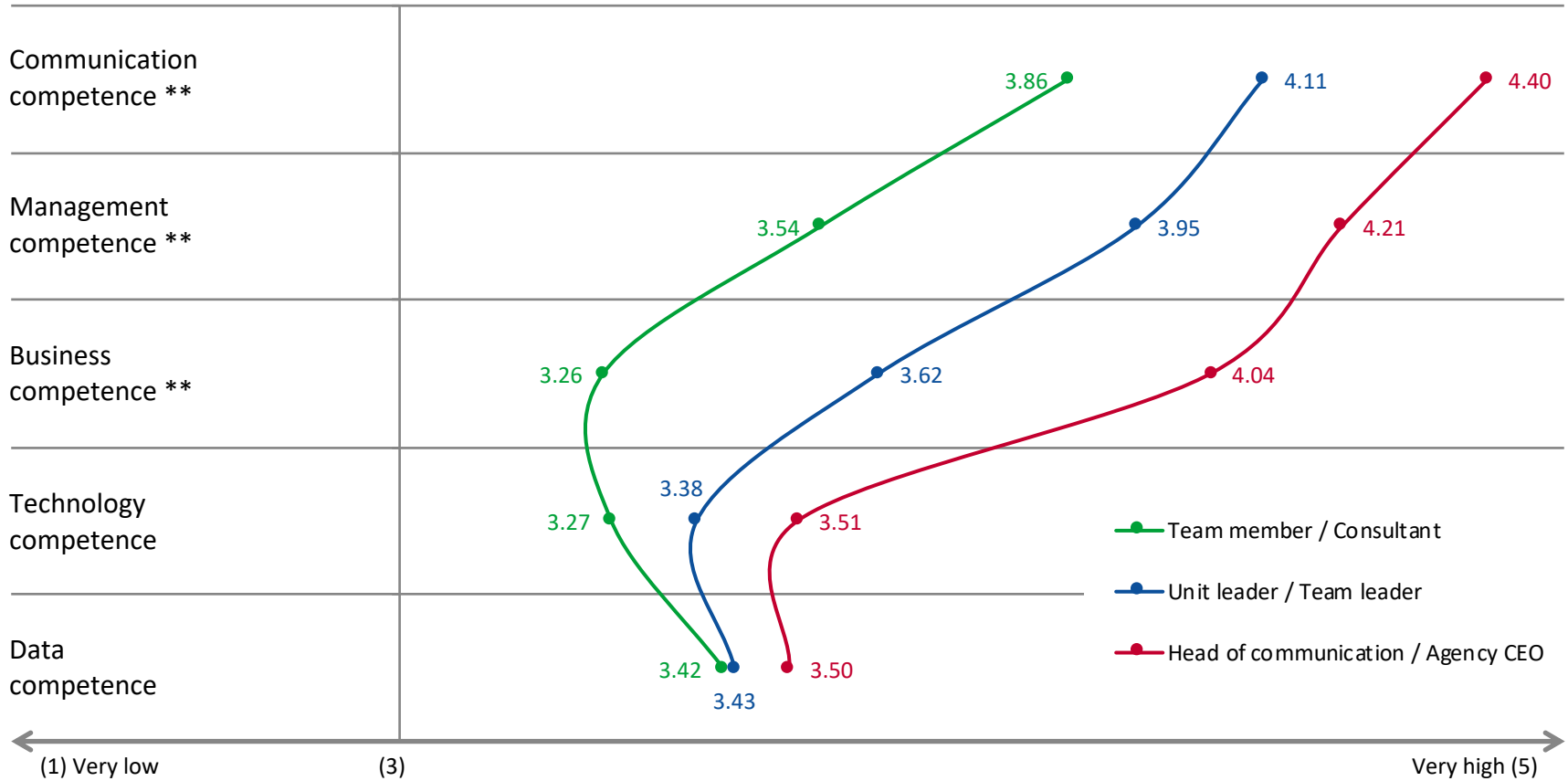
Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 247 communication professionals. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01). * Significant differences (independent samples T-Test, p ≤ 0.05).

Leaders are confident about their business, management and communication competencies, but rank equally to their subordinates in handling tech and data

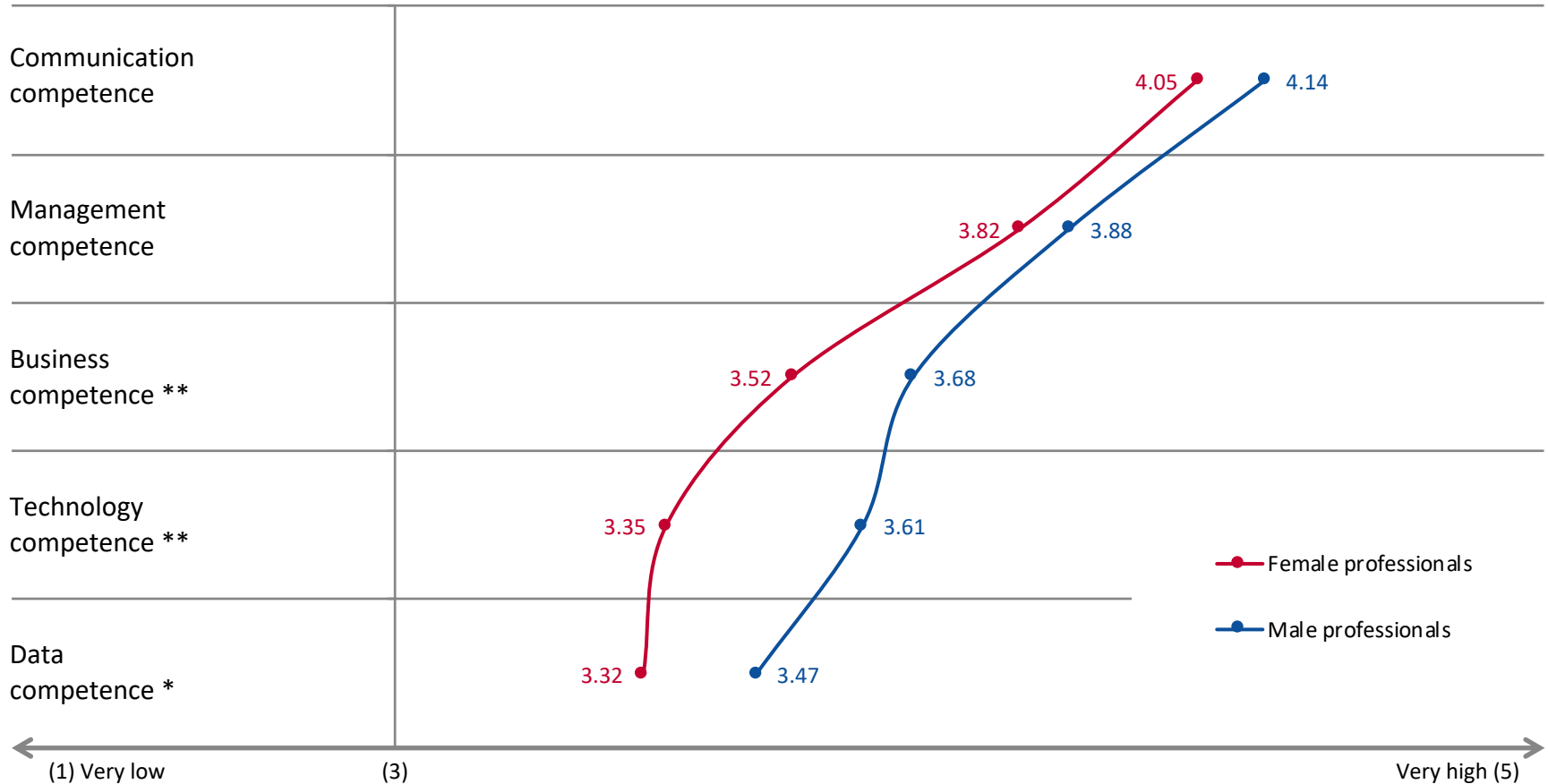
Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,063 communication professionals. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (Kendall rank correlation, $p \leq 0.01$).

Male professionals rate their skills and knowledge higher than female peers – significant differences in the levels of business, technology and data competencies

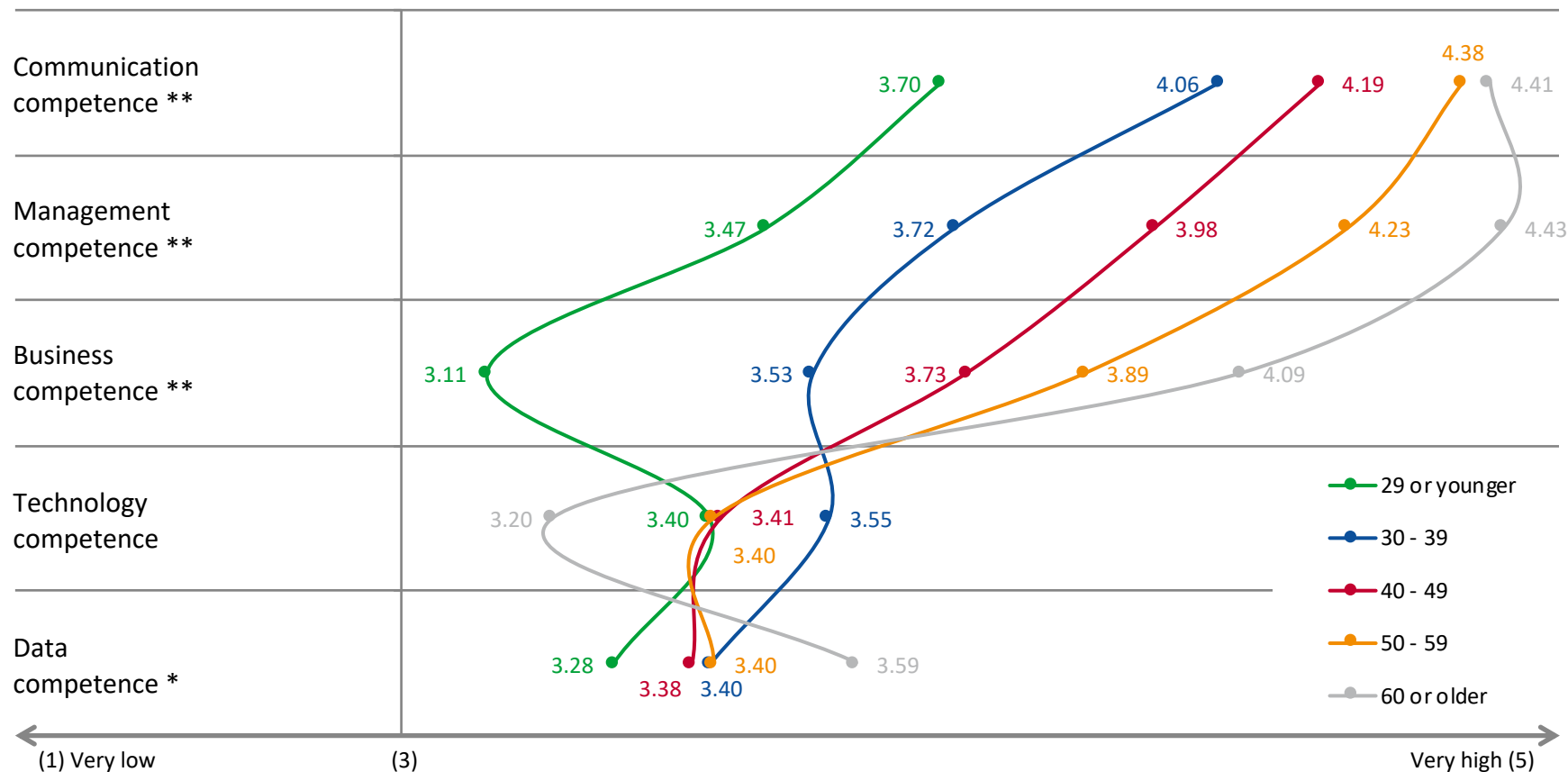
Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,142 communication professionals. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$). * Significant differences (independent samples T-Test, $p \leq 0.05$).

Older professionals lagging behind in technology competencies, but are stronger in terms of communication, management, and business skills

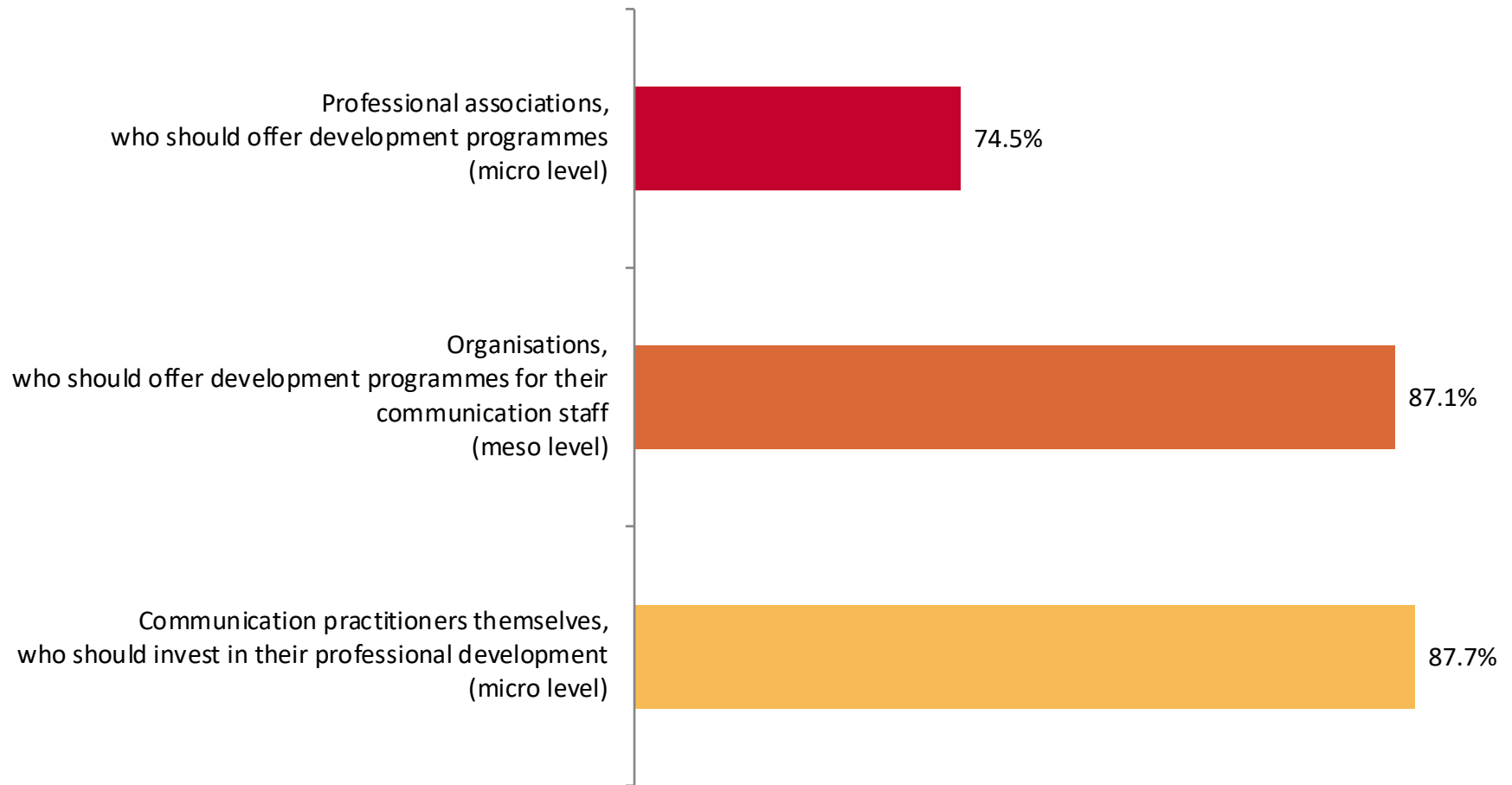
Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,145 communication professionals. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (Pearson correlation, $p \leq 0.01$). * Significant differences (Pearson correlation, $p \leq 0.05$).

Competency development: Most practitioners believe it is the responsibility of themselves and their employers

Responsibility for the further development of competencies in the communication profession



Practice of competency development in Asia-Pacific: Communication professionals have completed an average of 22 training days per year

Full days spent on personal training and development in 2019



Days spent for personal training and development across Asia-Pacific

	Days of work time	Days of free time (Weekends, holidays, evenings, ...)	Overall training days
Australia	15.7	17.5	33.2
China (Mainland)	9.5	8.8	18.3
Hong Kong & Macau, SAR	2.8	4.7	7.5
Indonesia	18.3	9.1	27.4
Korea	23.4	14.1	37.5
Malaysia	12.5	6.9	19.4
New Zealand	7.9	5.2	13.1
Philippines	17.0	4.5	21.5
Singapore	8.0	10.5	18.5
Taiwan	8.8	15.3	24.1
Vietnam	25.9	11.5	37.4

www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 696 communication professionals from 11 countries and territories. Q 24: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days)? Q 25: And how many of these days were your free time that you have invested (weekends, holidays, evenings, ...)? Mean values.

Communication professionals in non-profits spend more time on personal development than their colleagues in other types of organisations

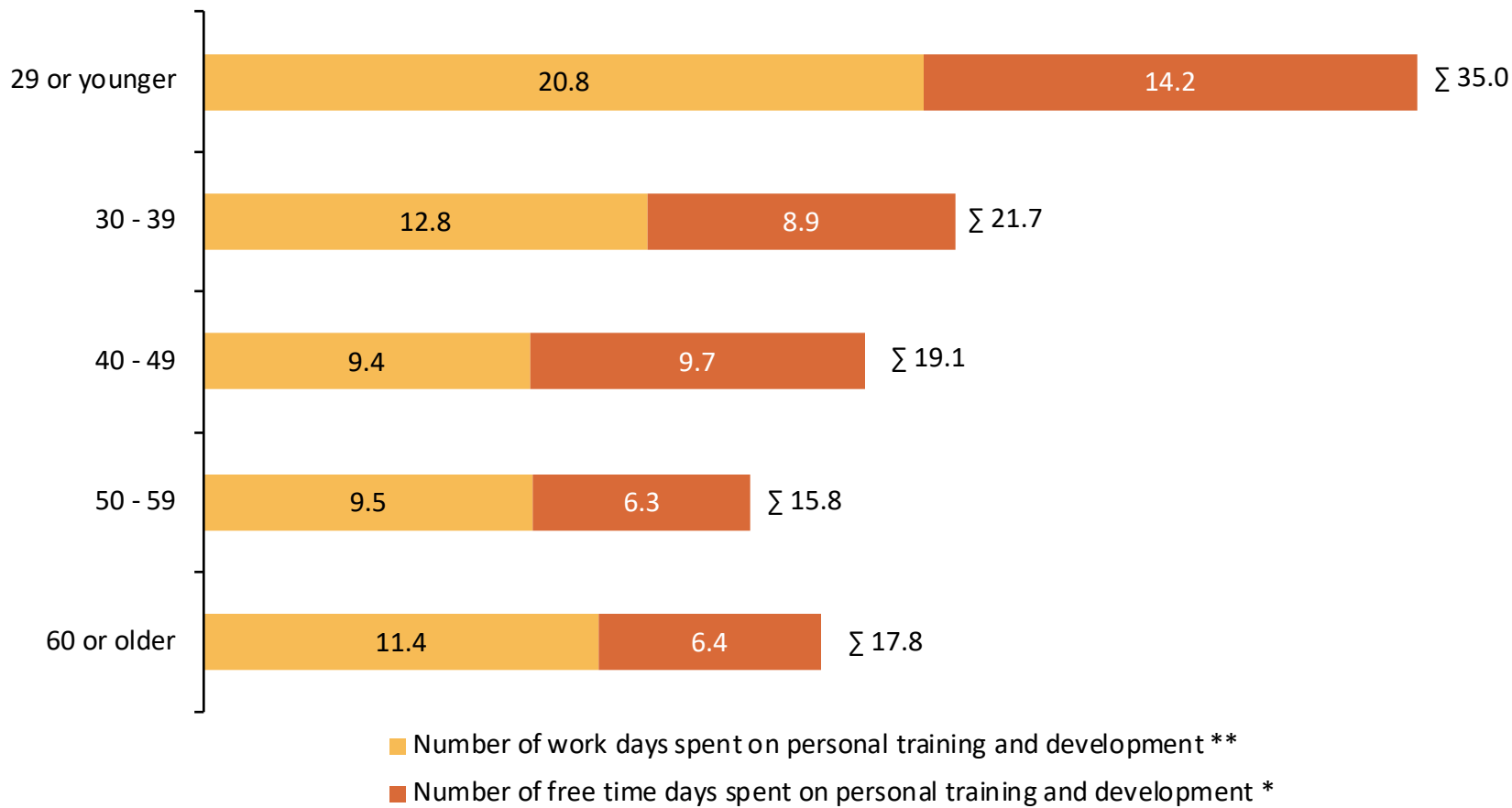
Average number of full days spent by communication practitioners for personal training and development



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 717 communication professionals. Q 24: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days)? Q 25: And how many of these days were your free time that you have invested (weekends, holidays, evenings, ...)? Mean values.

Younger professionals invest five weeks of work and leisure time in further education per year – many of them will probably study part-time to advance skills

Average number of full days spent by communication practitioners for personal training and development



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 717 communication professionals. Q 24: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days)? Q 25: And how many of these days were your free time that you have invested (weekends, holidays, evenings, ...)? Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01). * Significant differences (Pearson correlation, p ≤ 0.05).

Ethical challenges and
resources for the
communication profession



Ethical challenges and resources for the communication profession

Globalisation and advances in technology have created opportunities for public relations and strategic communication management. However, they also raise ethical concerns. Coleman and Wilkins (2009) contend that public relations practitioners are “good ethical thinkers” (p. 335) for their organisations. Yet, with the growing public concern about misinformation, disinformation, and manipulative corporate and marketing communication (Macnamara, 2020), practitioners in public relations and communication management are coming under increased pressure to make ethical decisions and provide ethical advice.

More than half of the communication practitioners surveyed (56.5%) report experiencing one or more ethical challenges in their work in the past year. Practitioners in Southeast Asian countries including Indonesia, Malaysia, the Philippines, and Vietnam report facing several ethical challenges a year. Interestingly, while 43.6% of all practitioners report facing no ethical challenges in the past year, practitioners in China (Mainland) and Taiwan report the least ethical challenges, with 64.7% of practitioners in China (Mainland) and 61.5% in Taiwan reporting ‘no ethical challenges’.

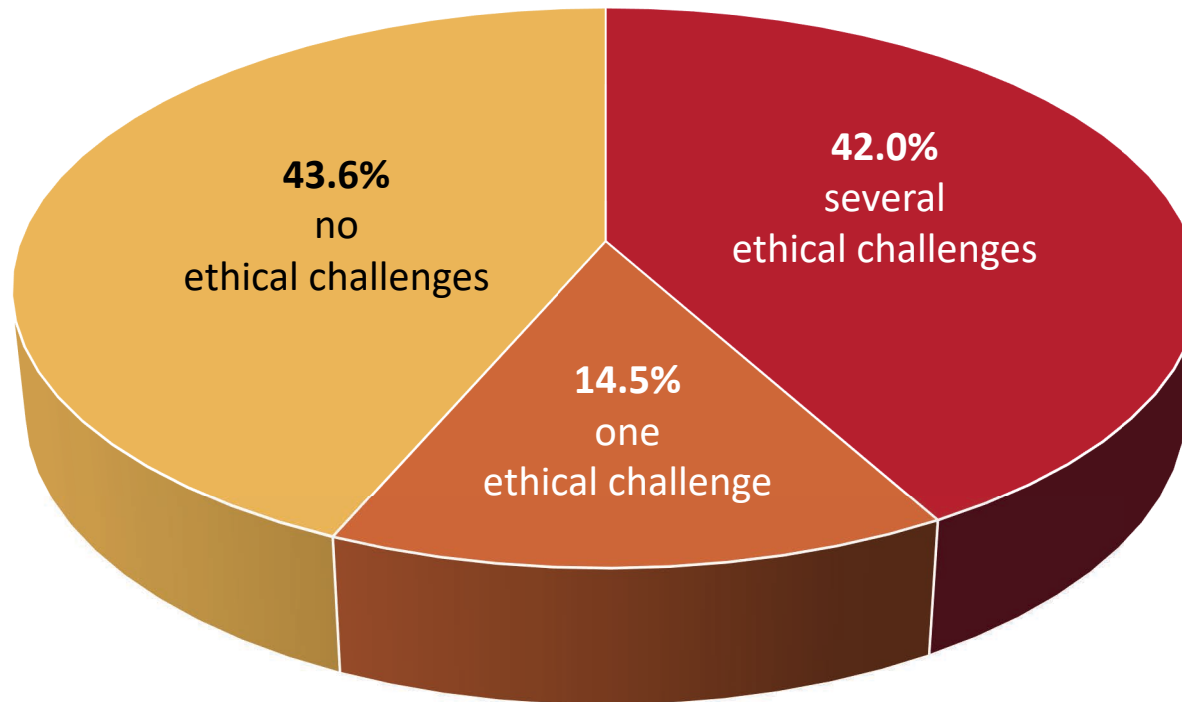
In terms of dealing with ethical challenges, Place (2010) has reported that practitioners rely on moral duty and maintaining others’ dignity in making ethical decisions. These approaches are underpinned by personal values. Industry and organisation policies are also a source of guidance, and almost all professional associations provide a code of ethics to their members. Practitioners in Asia-Pacific report using all resources available at macro (72.8%), meso (83.6%), and micro (86.9%) levels when dealing with ethical challenges. While relying on personal values is the most common approach in most countries and territories, Indonesian practitioners report relying mostly on codes of ethics of professional associations, while practitioners in the Philippines mostly use organisational ethical guidelines (meso level). This indicates that it is important for organisations and professional associations to support practitioners in relation to ethical decisions and practice.

Digital technologies have had a significant impact on public relations and communication management (Wiesenberg & Tench, 2020; Wiesenberg, Zerfass, & Moreno, 2017). While offering many benefits, concerns about privacy and ethical use of communication technology have been raised (Yang & Kang, 2015). This study found that more than 75% of Asia-Pacific practitioners are concerned about using bots (76.4%) and about using personal data as part of ‘big data’ analyses (76.8%)—far higher than their European counterparts. Audience targeting and profiling based on demographic information is the least concern in terms of ethics, although more than half of the practitioners surveyed (52%) expressed concern about this practice.

Training in ethics is identified as a key method for improving ethical practice. But 30.1% of practitioners report that they have never participated in ethics training. Of those who have had ethics training, 30.5% received this through their employer organisation and 26.1% attended ethics courses offered by professional associations. This indicates that professional associations could do more to address this gap. As Schauster and Neill (2017) noted, public relations and communication management need to respond to the fast-moving business and digital environments. Increased initiatives by professional associations and employer organisations could improve ethical understanding and practice, particularly in relation to use of new digital technologies.

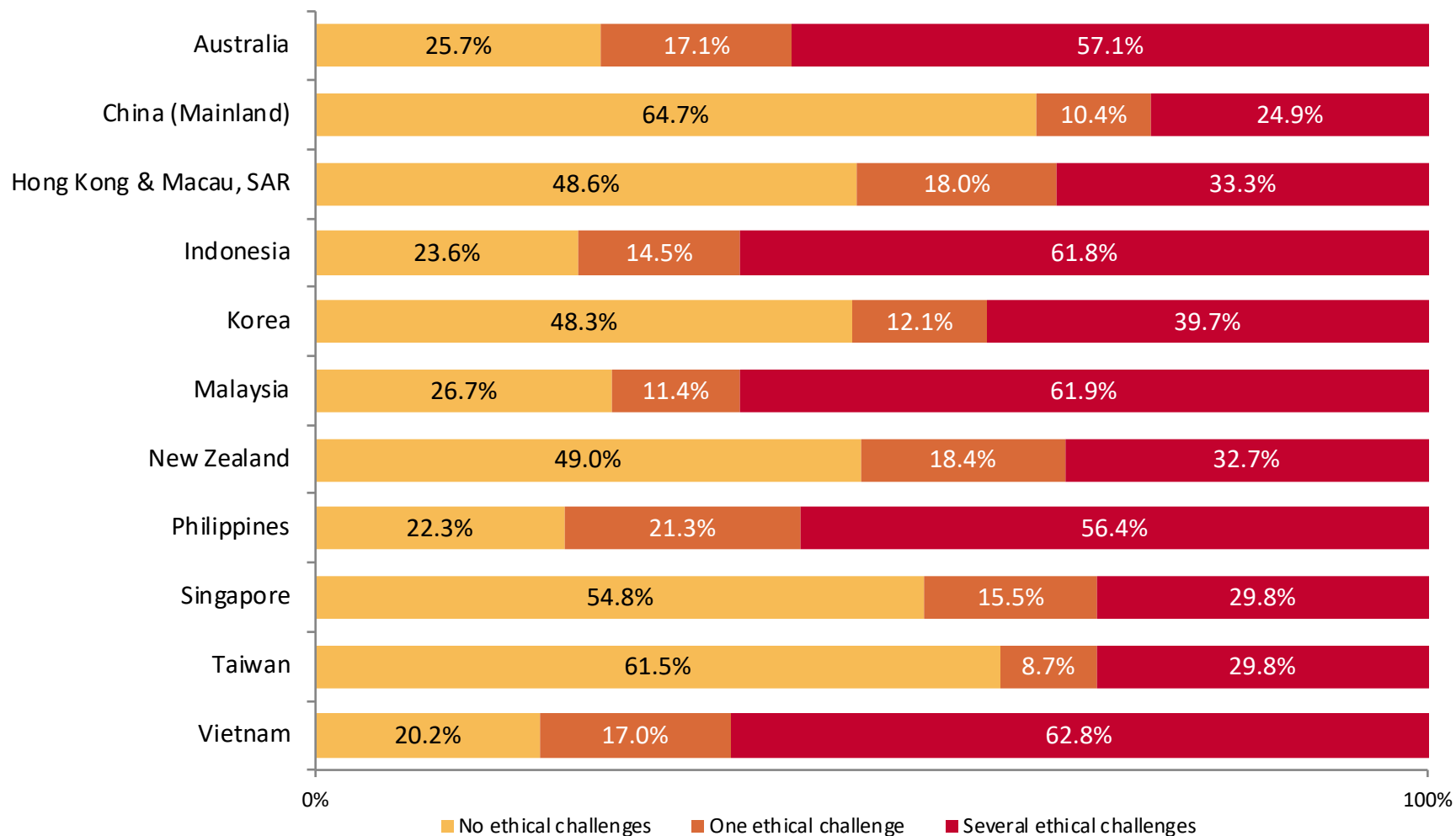
The majority of communication professionals in Asia-Pacific encounter ethical challenges in their daily work

Number of ethical challenges encountered in day to day work in the past year



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,051 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember.

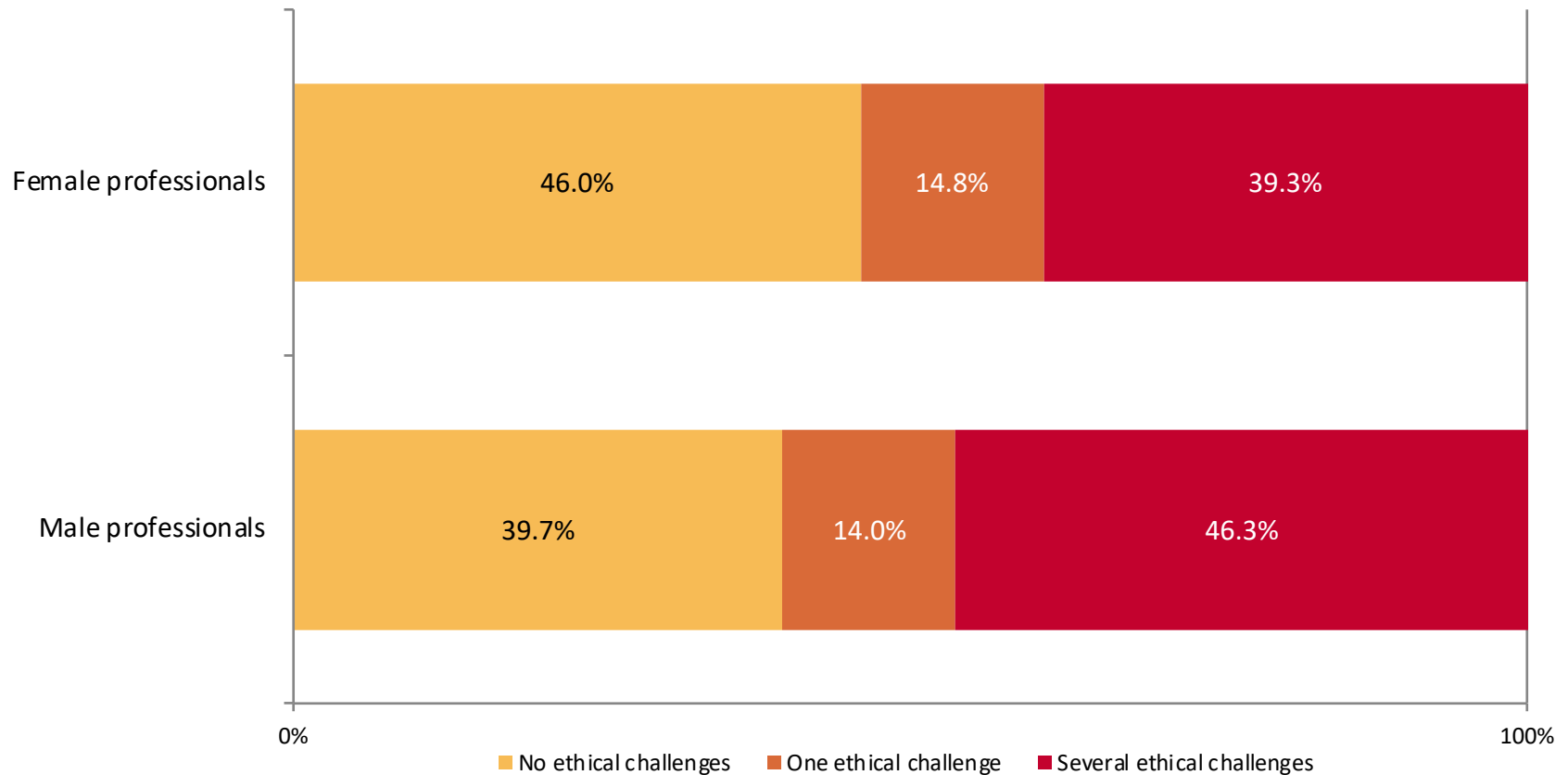
Ethical challenges in communication differ between countries and territories



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,020 communication professionals from 11 countries and territories. Q1: Like anyone else, Communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember.

Female communication practitioners report significantly less ethical challenges than their male colleagues

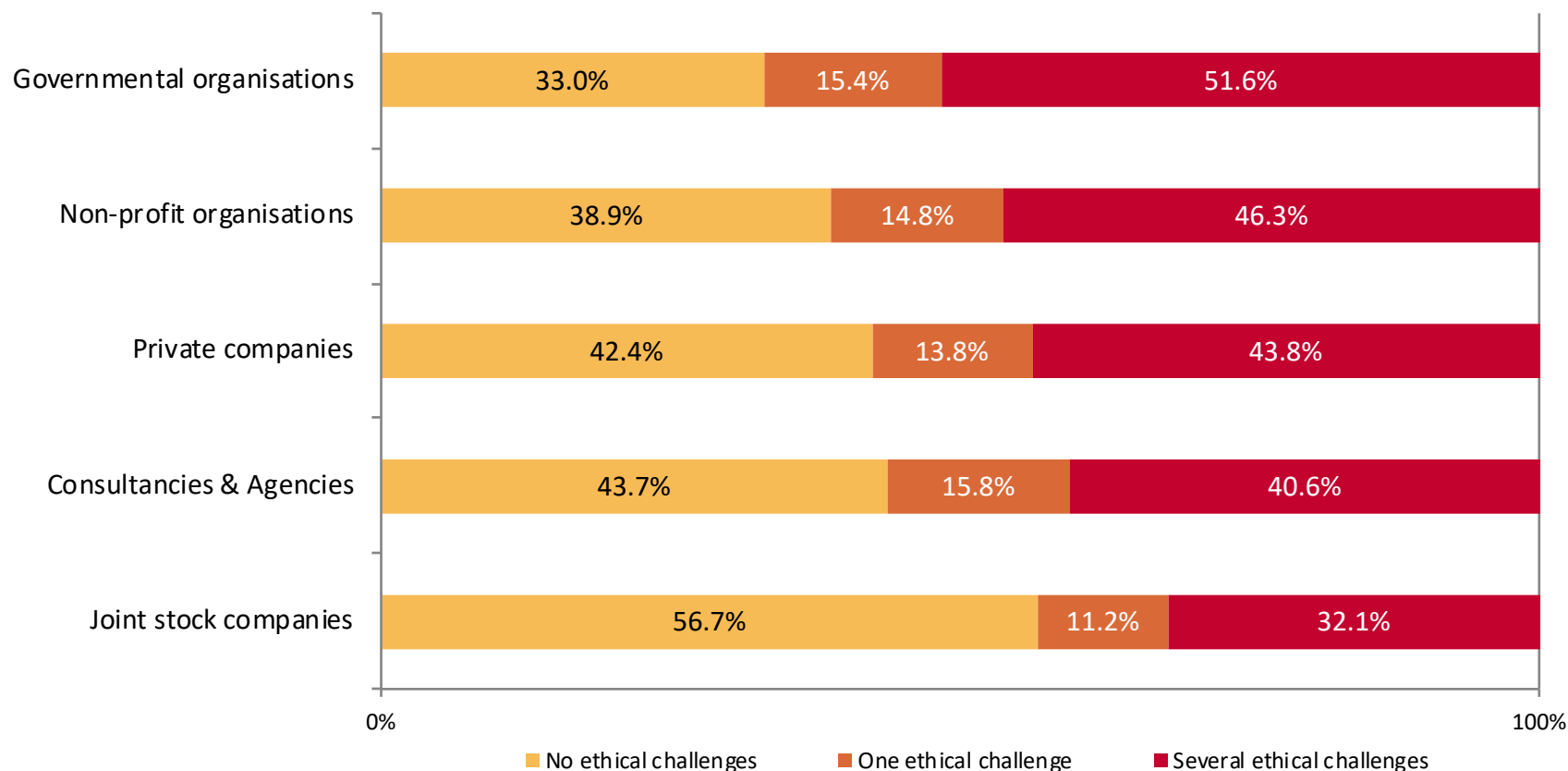
Number of ethical challenges encountered in day to day work in the past year



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,048 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Significant differences between women and men (Mann-Whitney U Test, $p \leq 0.05$).

Ethical challenges are most common in governmental organisations, compared to other types of organisations

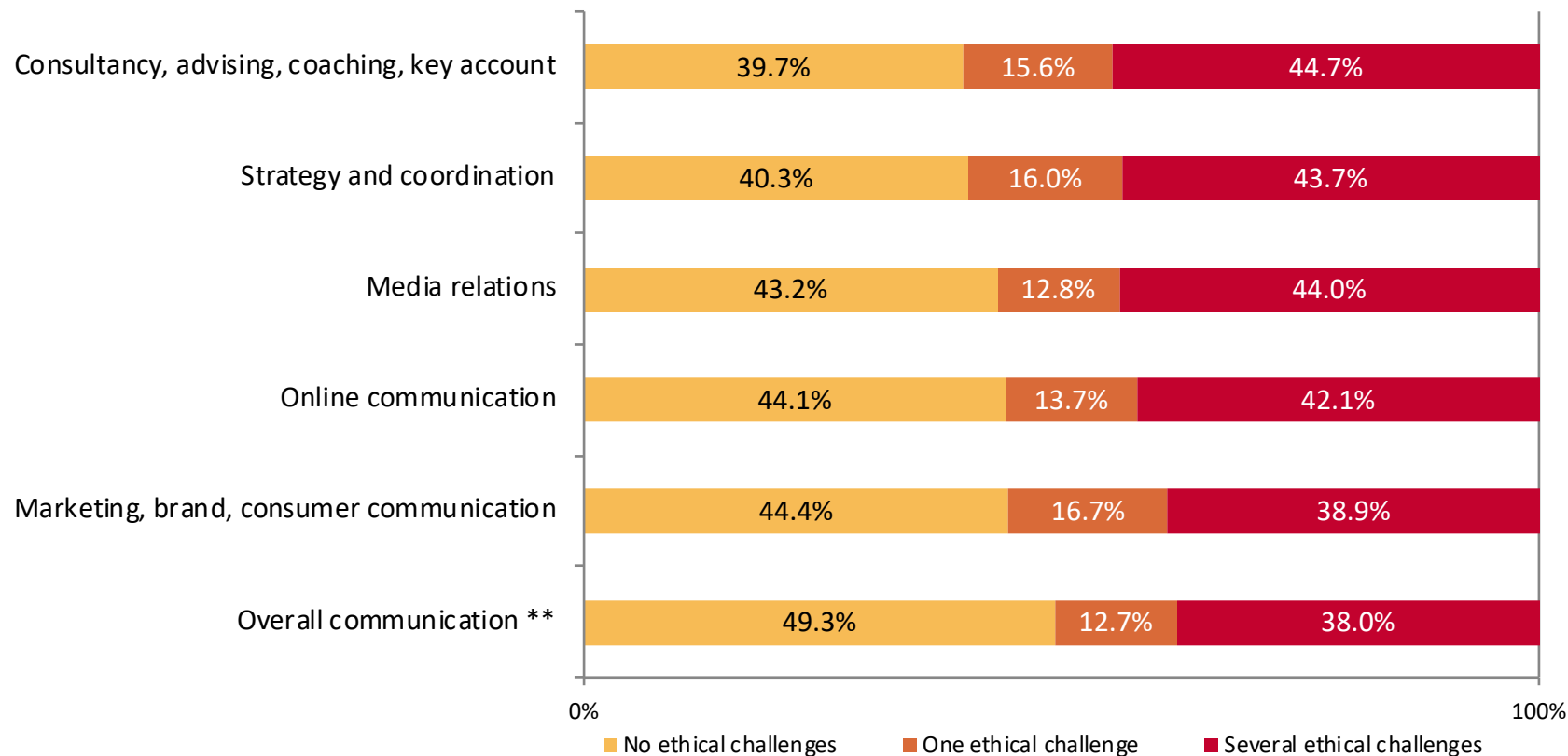
Number of ethical challenges encountered by communication professionals in day to day work in the past year



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,051 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Highly significant differences between various types of organisations (chi-square test, $p \leq 0.01$).

Communication generalists report less ethical incidents than their peers in other areas of work

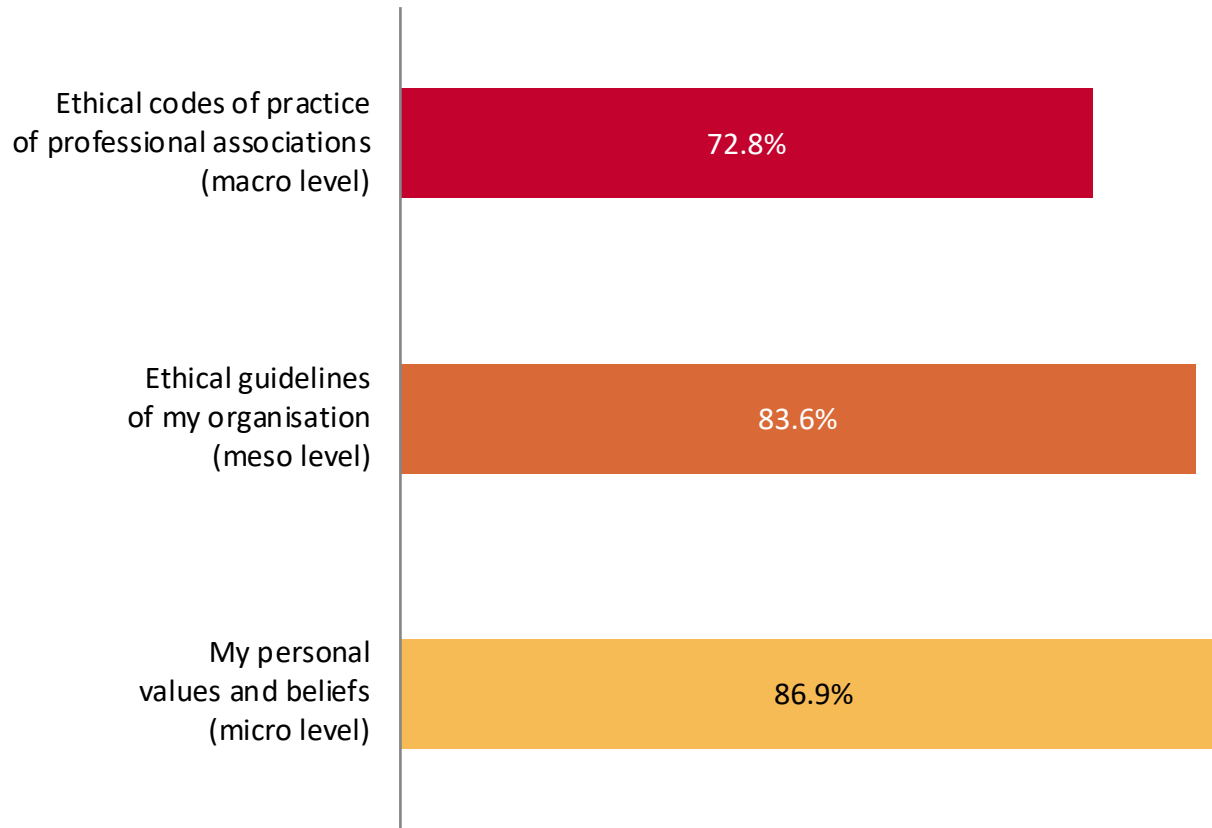
Number of ethical challenges encountered by communication professionals in day to day work in the past year



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 231 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Q 24: What are the dominant areas of your work? Please pick 3! ** Highly significant differences (chi-square test, p ≤ 0.01).

Dealing with ethical challenges: Most practitioners rely on their personal values; organisational guidelines and codes promoted by associations are less important

Resources used by communication practitioners when dealing with ethical challenges

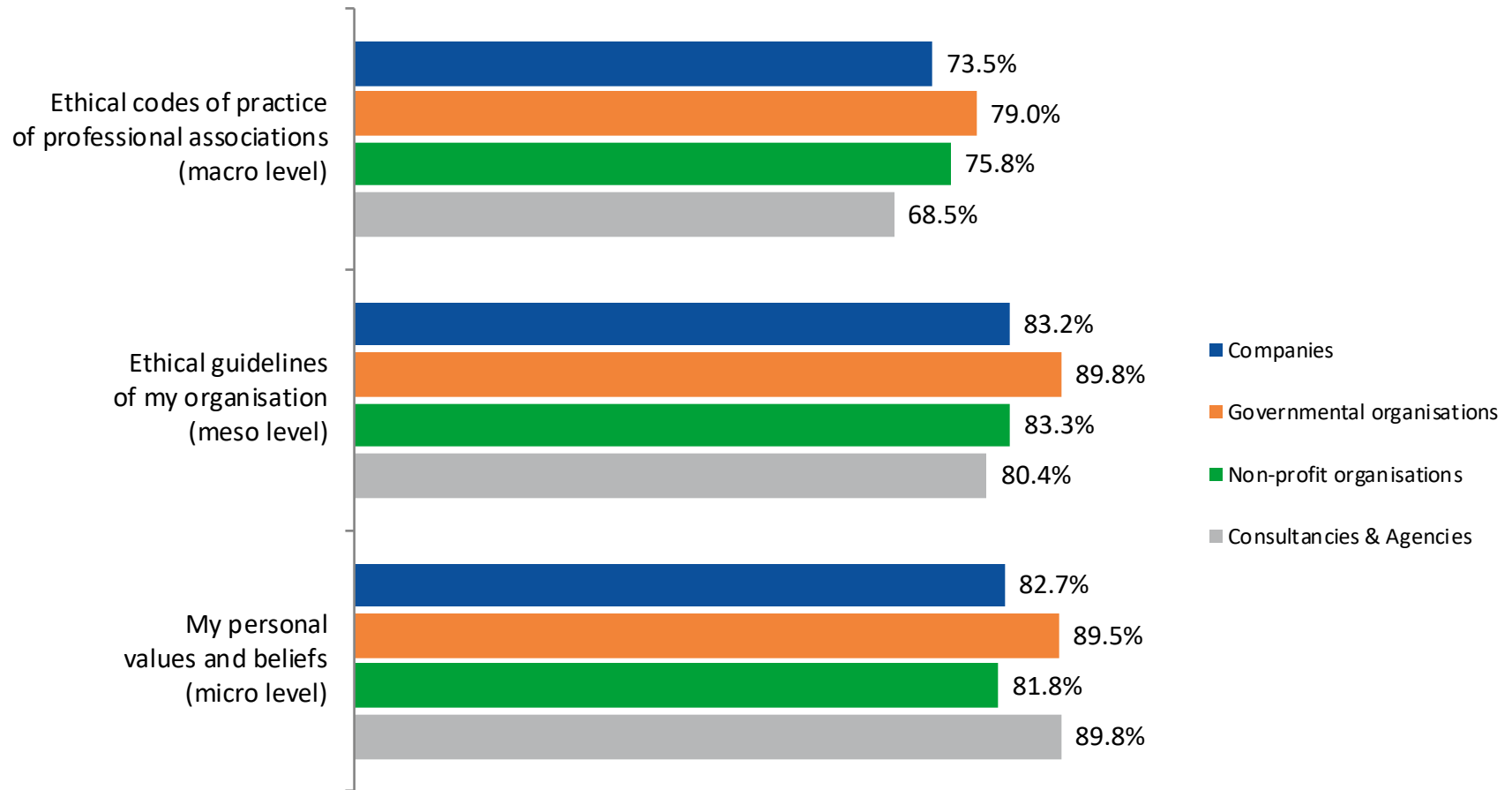


Resources used for dealing with ethical challenges across Asia-Pacific

	Ethical codes of practice of professional associations (macro level)	Ethical guidelines of my organisation (meso level)	My personal values and beliefs (micro level)
Australien	56.0%	77.8%	84.0%
China (Mainland)	65.0%	79.6%	88.3%
Hong Kong & Macau, SAR	66.1%	78.3%	83.9%
Indonesia	97.6%	92.3%	88.1%
Korea	50.0%	73.1%	73.3%
Malaysia	84.4%	86.4%	90.9%
New Zealand	72.0%	88.2%	92.0%
Philippines	90.4%	92.2%	91.8%
Singapore	56.8%	84.4%	91.9%
Taiwan	70.0%	80.6%	87.5%
Vietnam	76.0%	85.7%	88.0%

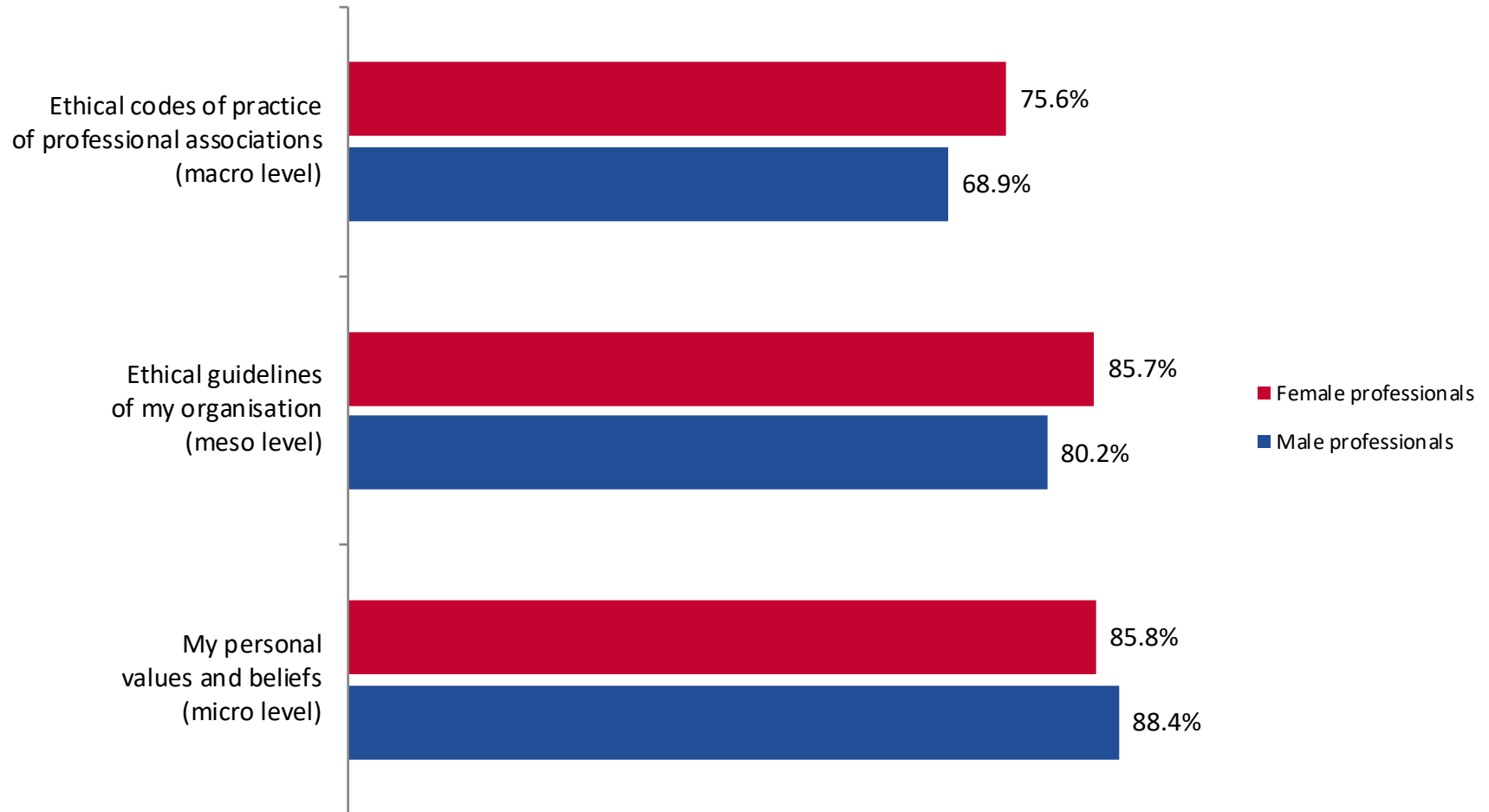
Organisational guidelines are most acknowledged in governmental organisations, while practitioners in consultancies and agencies trust in personal values and beliefs

Resources used by communication practitioners when dealing with ethical challenges



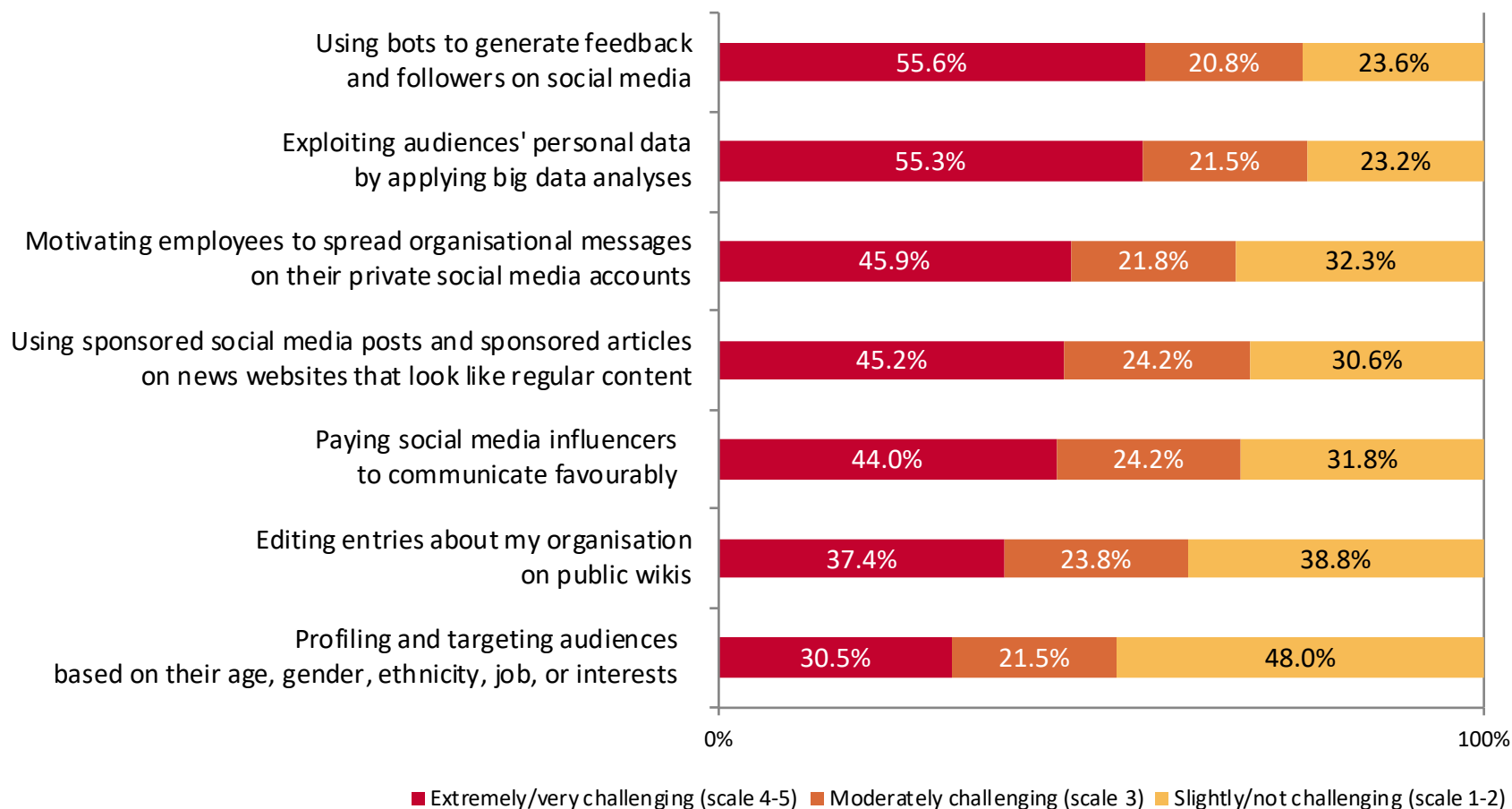
Female communicators rely more often on professional codes of ethics and organisational guidelines, while men depend on their personal values and beliefs

Resources used for dealing with ethical challenges



Ethical concerns over communication practices on social media: Three out of four practitioners are worried about using bots and big data analyses

Ethical challenges of current communication practices



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,036 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging).

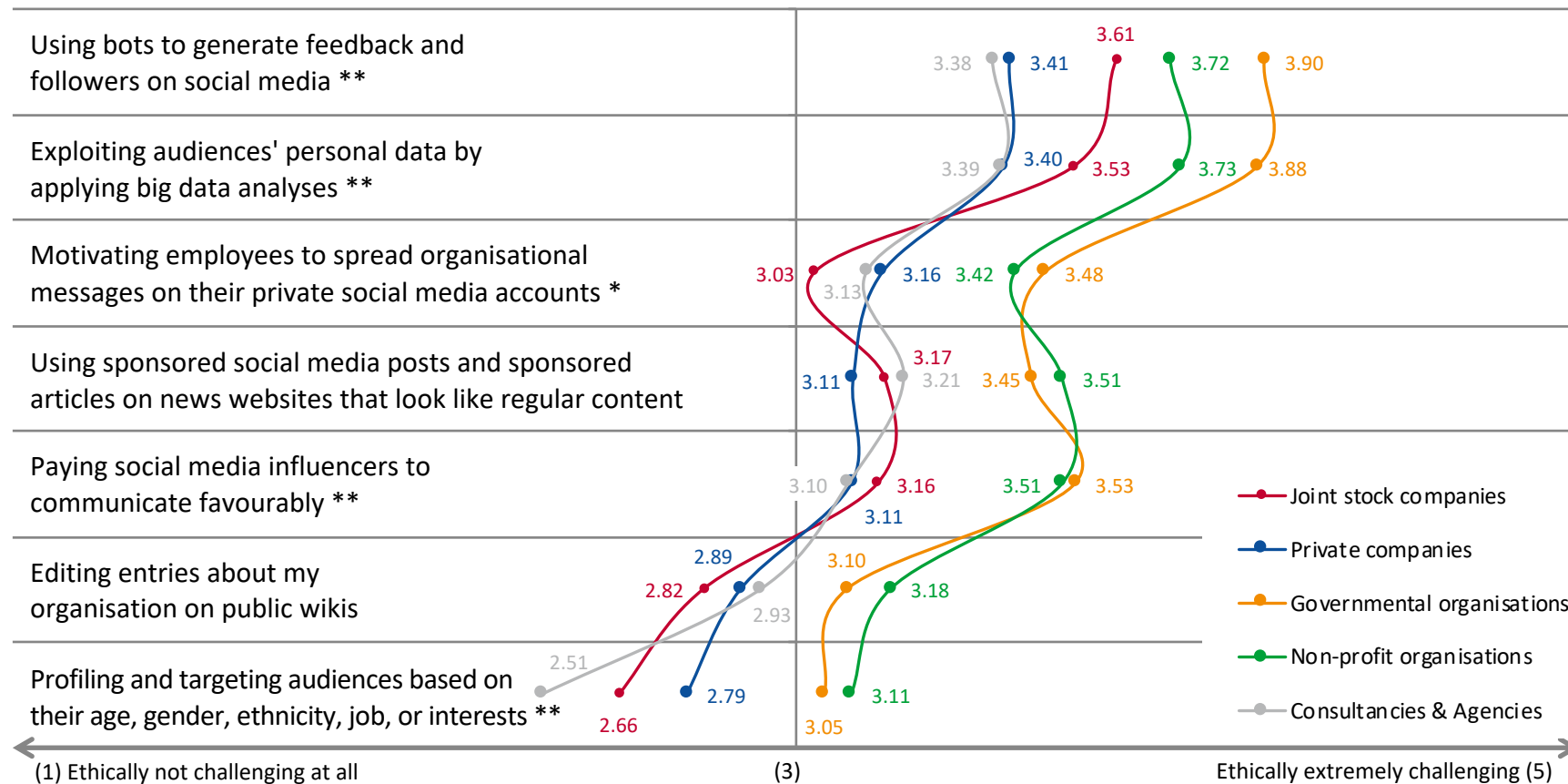
Ethical concerns over communication practices across Asia-Pacific

	Using bots to generate feedback and followers on social media	Exploiting audiences' personal data by applying big data analyses	Motivating employees to spread organisational messages on their private social media accounts **	Using sponsored social media posts and sponsored articles on news websites	Paying social media influencers to communicate favourably **	Editing entries about my organisation on public wikis **	Profiling and targeting audiences based on age, gender, ethnicity, job, or interests
Australia	84.4%	72.7%	34.3%	67.6%	47.1%	44.1%	20.6%
China (Mainland)	43.9%	45.0%	38.8%	40.0%	42.7%	30.9%	38.9%
Hong Kong & Macau, SAR	48.0%	48.1%	40.4%	36.2%	25.9%	25.5%	15.4%
Indonesia	61.7%	72.9%	62.3%	50.0%	51.7%	49.2%	48.4%
Korea	53.3%	47.5%	50.4%	42.4%	41.1%	33.3%	23.4%
Malaysia	61.8%	66.7%	52.8%	48.5%	53.3%	44.6%	45.0%
New Zealand	77.8%	64.4%	43.5%	46.8%	42.6%	36.6%	8.2%
Philippines	63.5%	60.2%	41.4%	43.4%	54.2%	38.6%	29.4%
Singapore	72.2%	47.7%	32.6%	42.9%	36.3%	34.1%	20.9%
Taiwan	40.5%	52.3%	56.0%	53.2%	45.2%	40.6%	28.8%
Vietnam	46.9%	66.7%	48.0%	43.9%	45.5%	50.0%	37.0%

www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 480 communication professionals from 11 countries and territories. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Communicators working in governmental organisations and non-profits are more troubled about using bots and exploiting audiences' personal data

Ethical challenges of current communication practices

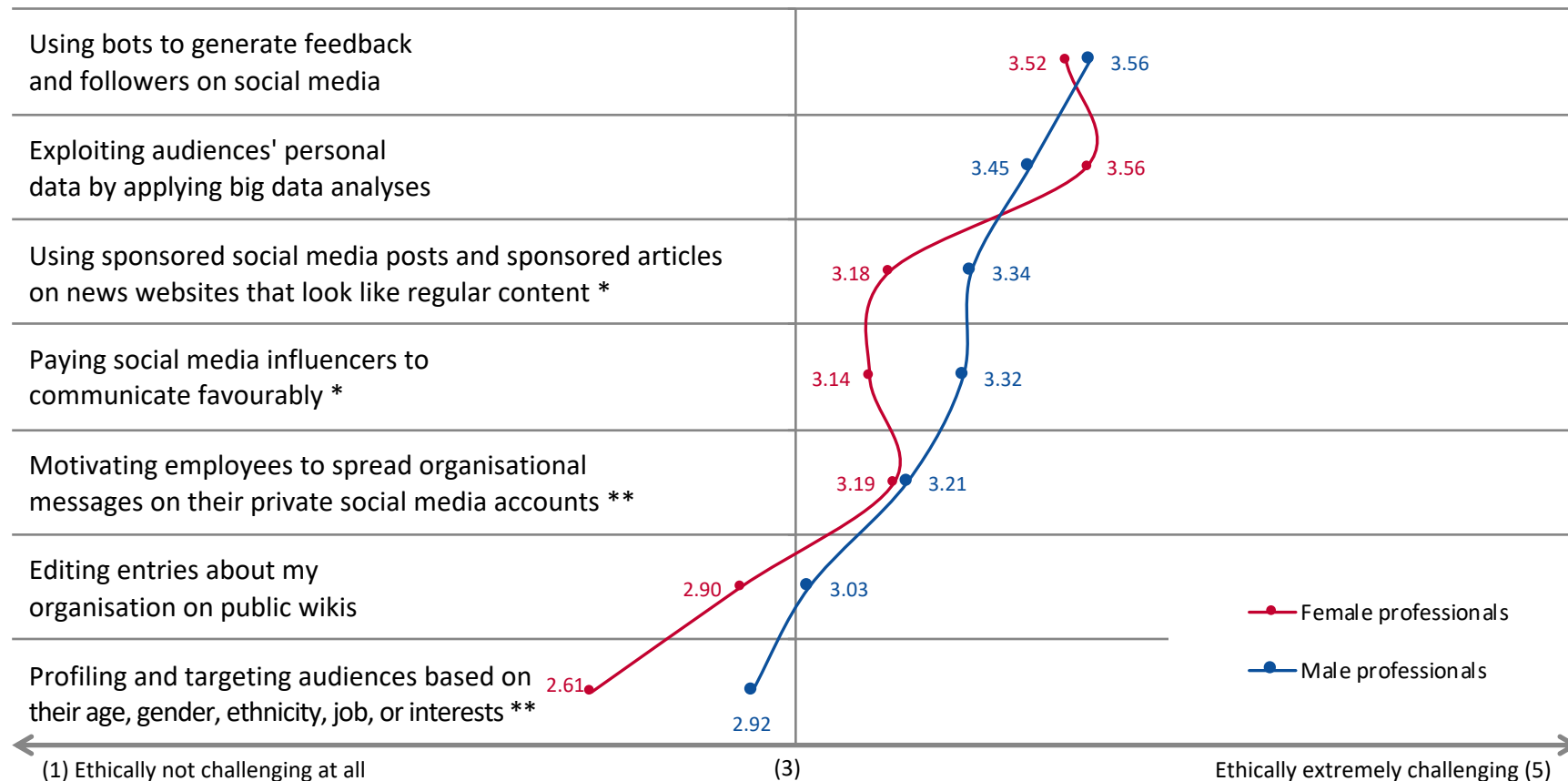


www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,036 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

* Significant differences (ANOVA, p ≤ 0.05).

Male practitioners have most ethical concerns about bots, use of personal data, and employees spreading organisational information on social media

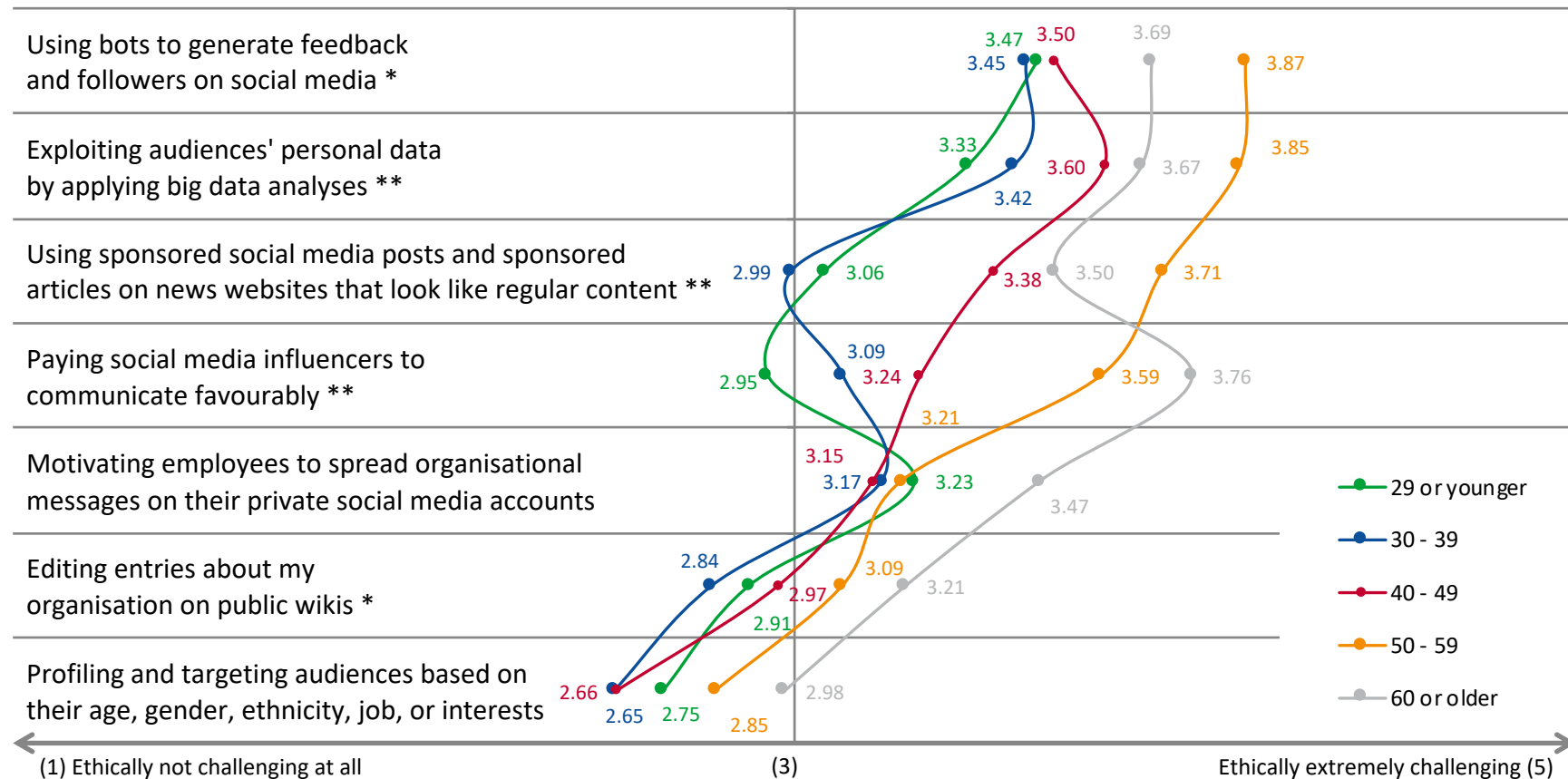
Ethical challenges of current communication practices



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,034 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. ** Highly significant differences (independent sample T-Test, p ≤ 0.01). * Significant differences (independent sample T-Test, p ≤ 0.05).

Younger communication professionals have less ethical concern in relation to sponsored content and social media influencers

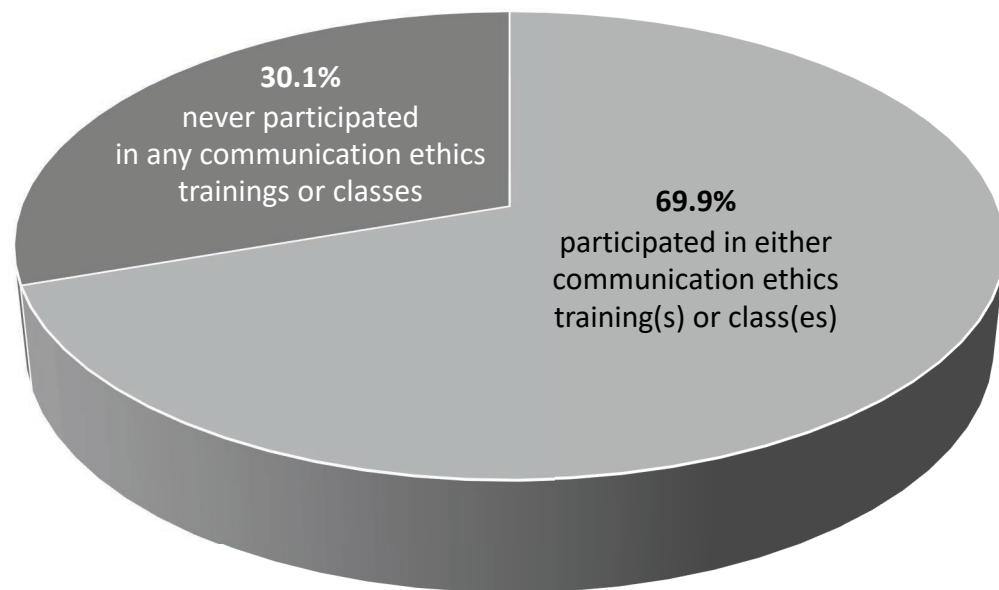
Ethical challenges of current communication practices



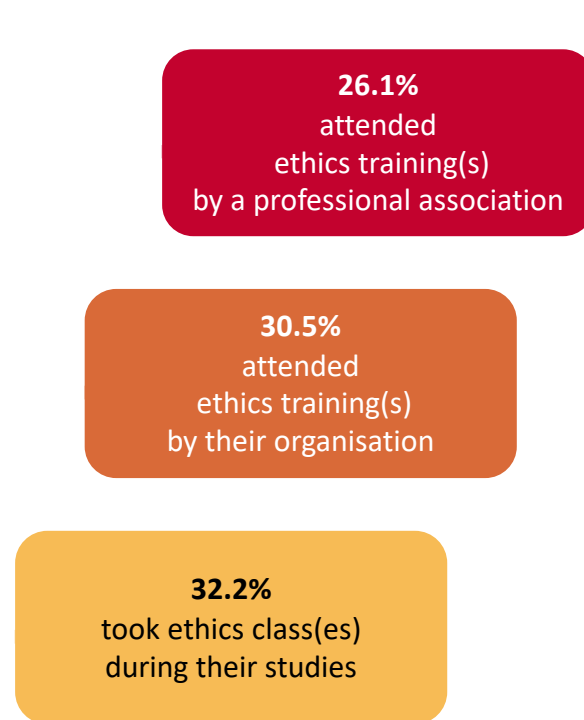
www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,036 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. ** Highly significant differences (Pearson correlation, $p \leq 0.01$). * Significant differences (Pearson correlation, $p \leq 0.05$).

Deficiencies in developing ethical competencies: Every third communication professional in Asia-Pacific has never participated in any formal training or classes

Participation in training on communication ethics



Sources of training on communication ethics (multiple selections possible)



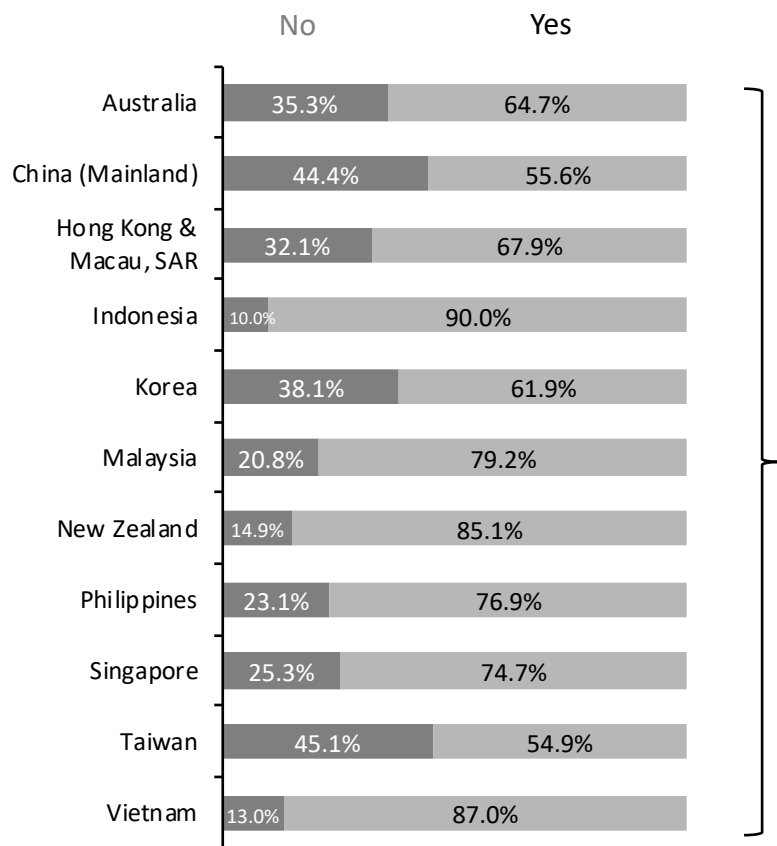
When was the last time you participated in communication ethics training?

Less than 1 year ago	27.1%
1 to 3 years ago	20.1%
More than 3 years ago	24.2%

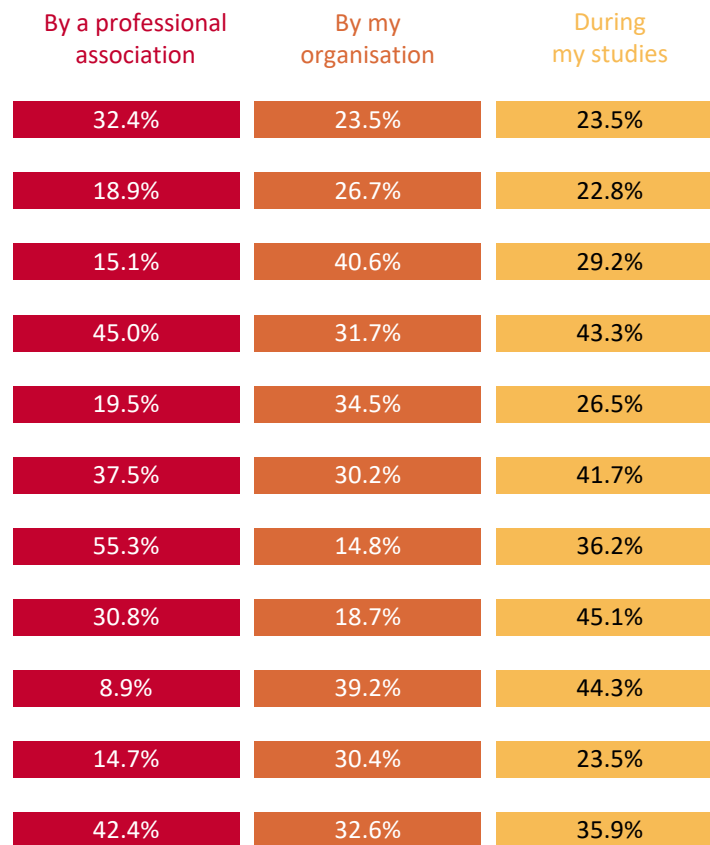
www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 950 communication professionals. Q26: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember. Q27: When was the last time you participated in communication ethics training? Less than 1 year ago / 1 to 3 years ago / More than 3 years ago / I haven't participated in any communication ethics training so far / Don't know or don't remember.

Participation in training on communication ethics across Asia-Pacific

Participation in training on communication ethics



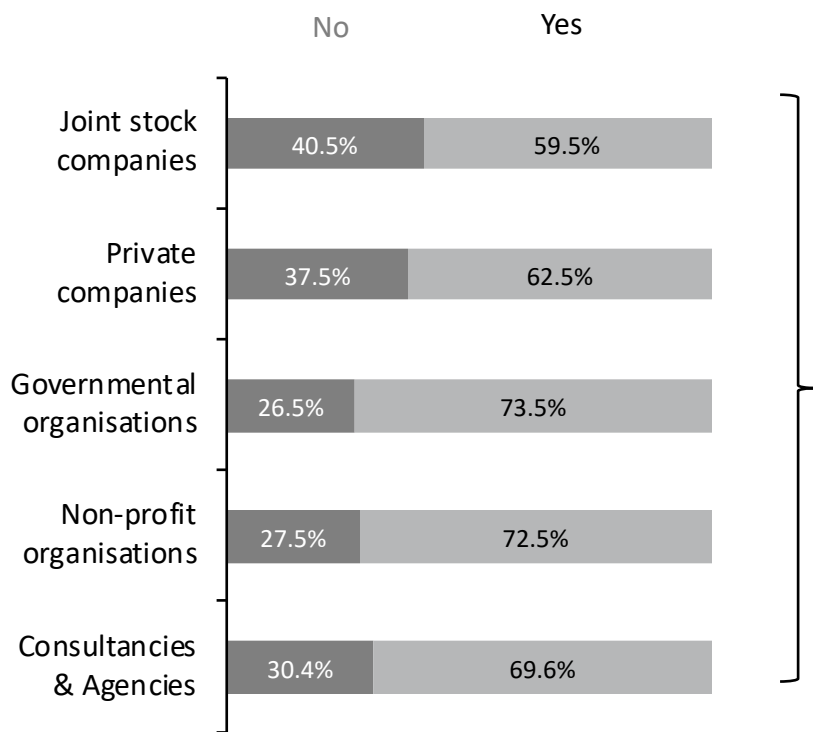
*Ethics trainings attended ...
(multiple selections possible)*



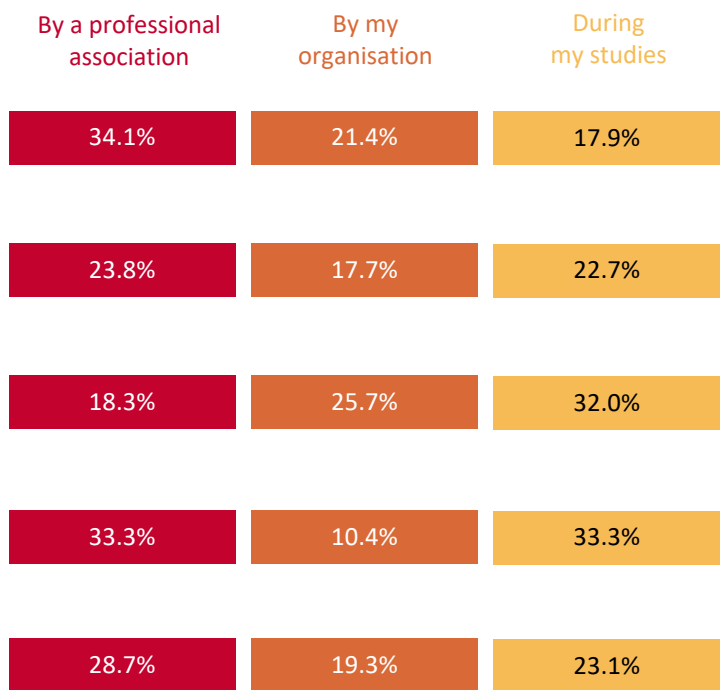
www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,000 communication professionals from 11 countries and territories. Q26: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember.

Attending internal ethics training is most common in governmental organisations – joint stock companies rely on further education offered by professional associations

Participation in training on communication ethics



Ethics trainings attended ... (multiple selections possible)

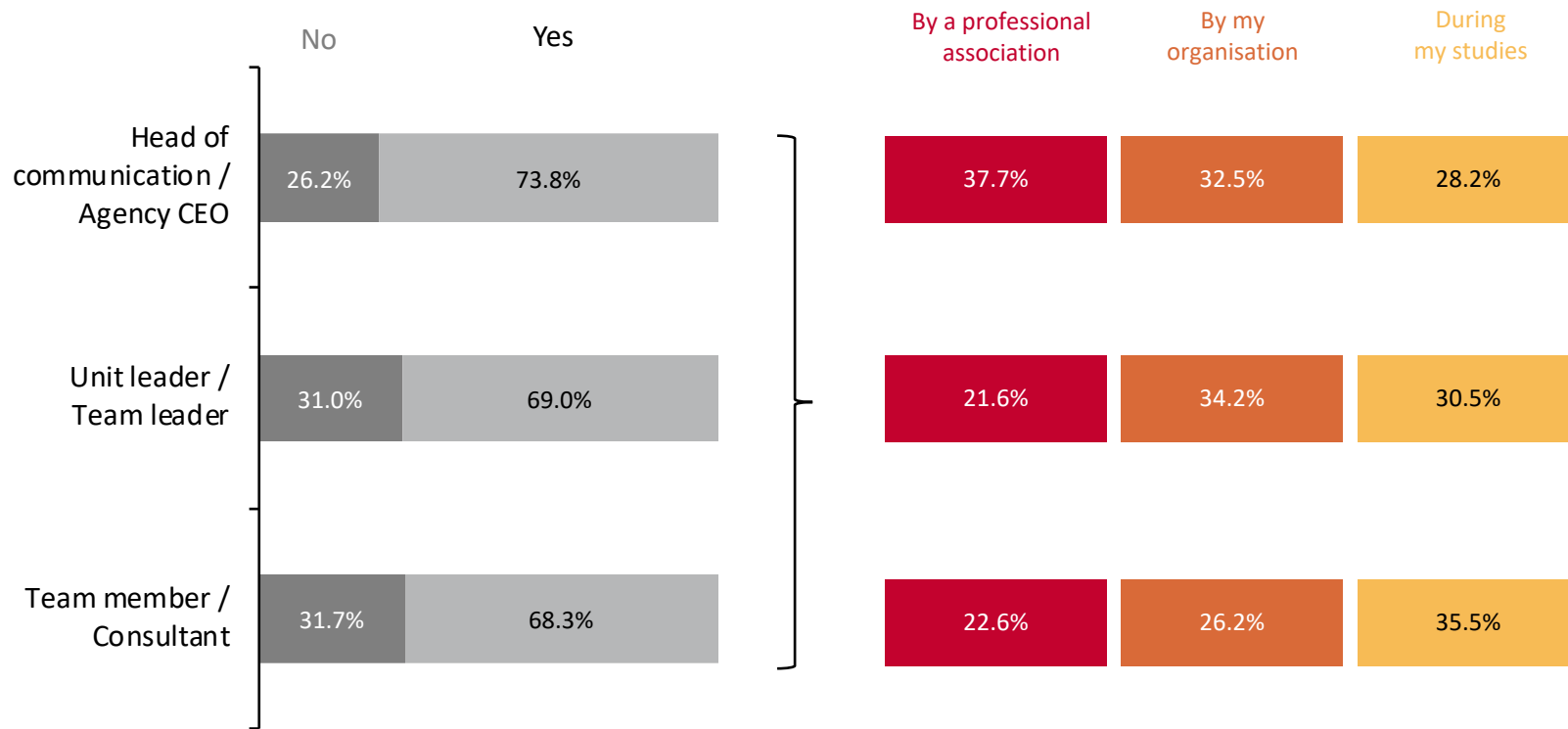


www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,033 communication professionals. Q 26: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember.

Communication leaders have participated in ethics training more than junior practitioners – particularly training by professional associations

Participation in training on communication ethics

*Ethics trainings attended ...
(multiple selections possible)*



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 963 communication professionals. Q26: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember.

Assessing and advancing
gender equality



Assessing and advancing gender equality

The PR and communication industry has responded to the United Nation's inclusion of gender equality in its Sustainable Development Goals (SDGs) with requirements such as reports (i.e. *GWPR 2019*) and initiatives such as workshops. However, recent studies have pointed out that gender inequalities persist in the communication field globally (Topić et al., 2020).

The APCM 2020 study shows that gender issues remain prevalent in Asia. Women make up more than three-quarters (75.9%) of the regional workforce in PR and communication management. However, only 59% of the senior communication leaders in the region are female, suggesting continuing barriers in ascent to leadership.

Comparison across countries and territories shows that employment of women and appointment of women to senior roles varies substantially. Women make up 95% of communication departments and agencies in New Zealand, compared to 57% in Indonesia. Female leadership in communication is strong in New Zealand (76.1%), Singapore (78.3%), and Taiwan (69.4%), while Malaysia, the Philippines, and Korea lag in appointment of women to senior roles.

A majority (60.8%) of communication professionals agree that gender equality has advanced, but have mixed opinions on measures for improvement. Almost one-third (32.0%) disagree that enough has been done to support women in the field in their country. Some 42.5% of the respondents recognise a glass ceiling problem at a macro level (across the profession), but only a quarter (25.2%) see a glass ceiling at micro level (in their own organisation).

Concern about a glass ceiling at a macro level are most reported in governmental organizations in Asia-Pacific, with 53.5% of communicators in these organisations acknowledging a glass ceiling, compared to only 39.5% perceiving a glass ceiling in companies. The study also identifies denial of a glass ceiling affecting women among male practitioners. Almost half of female communication professionals (47.6%) agree that a glass ceiling affects the field, compared to only 32.5% of males. At a personal level, almost a third (31.3%) of female practitioners stated that they are personally affected by an invisible barrier preventing them from rising up the ranks.

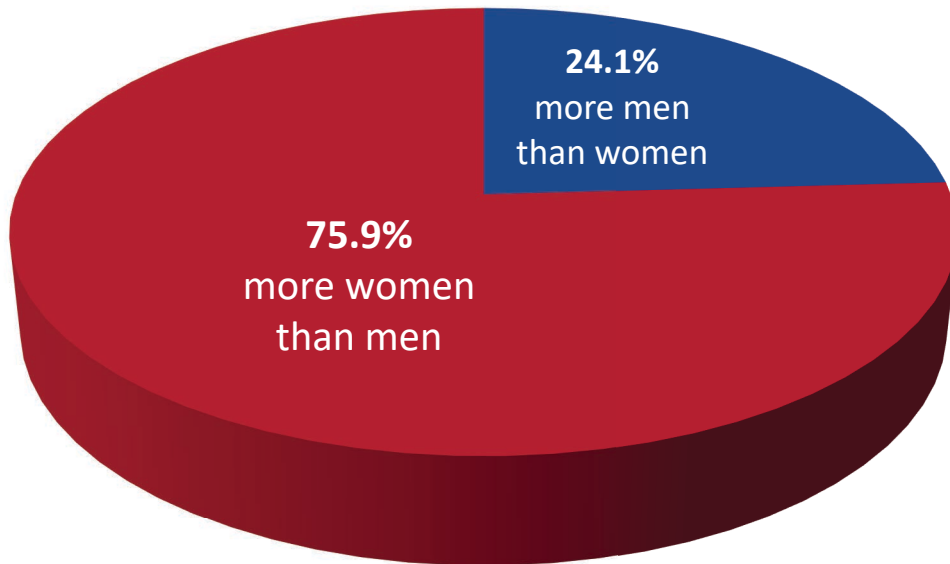
Organisational barriers are reported as the major contributors to the glass ceiling, with lack of flexibility to take care of family commitments being the most cited (60.9%), followed by lack of transparency of promotion policies (50.9%), and lack of specific networks and development programmes for women (49.1%).

A lack of specific competencies poses a barrier to women in some countries such as Indonesia, with 42.9% citing this concern, while only 9.5% of practitioners in Australia identified this factor. Perhaps not surprisingly, non-profit organisations are rated most highly in terms of offering flexibility to take care of family obligations and having more transparent promotional policies.

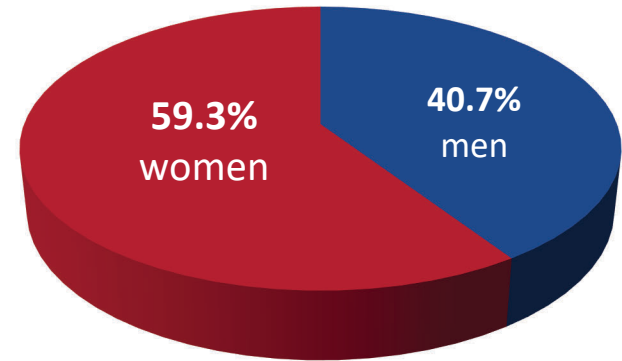
In terms of how to further advance opportunities for women, the majority of respondents in almost all countries and territories believe that organizations have the most capability to effect change. However, 51.4% of Indonesian communicators and almost 40% of Vietnamese communicators believe that change is mostly up to female communicators themselves. Online communicators say that professional associations can play a key role.

Gender issues at work: In 75 percent of communication departments and agencies, women are in the majority, but only six out of ten top communicators are female

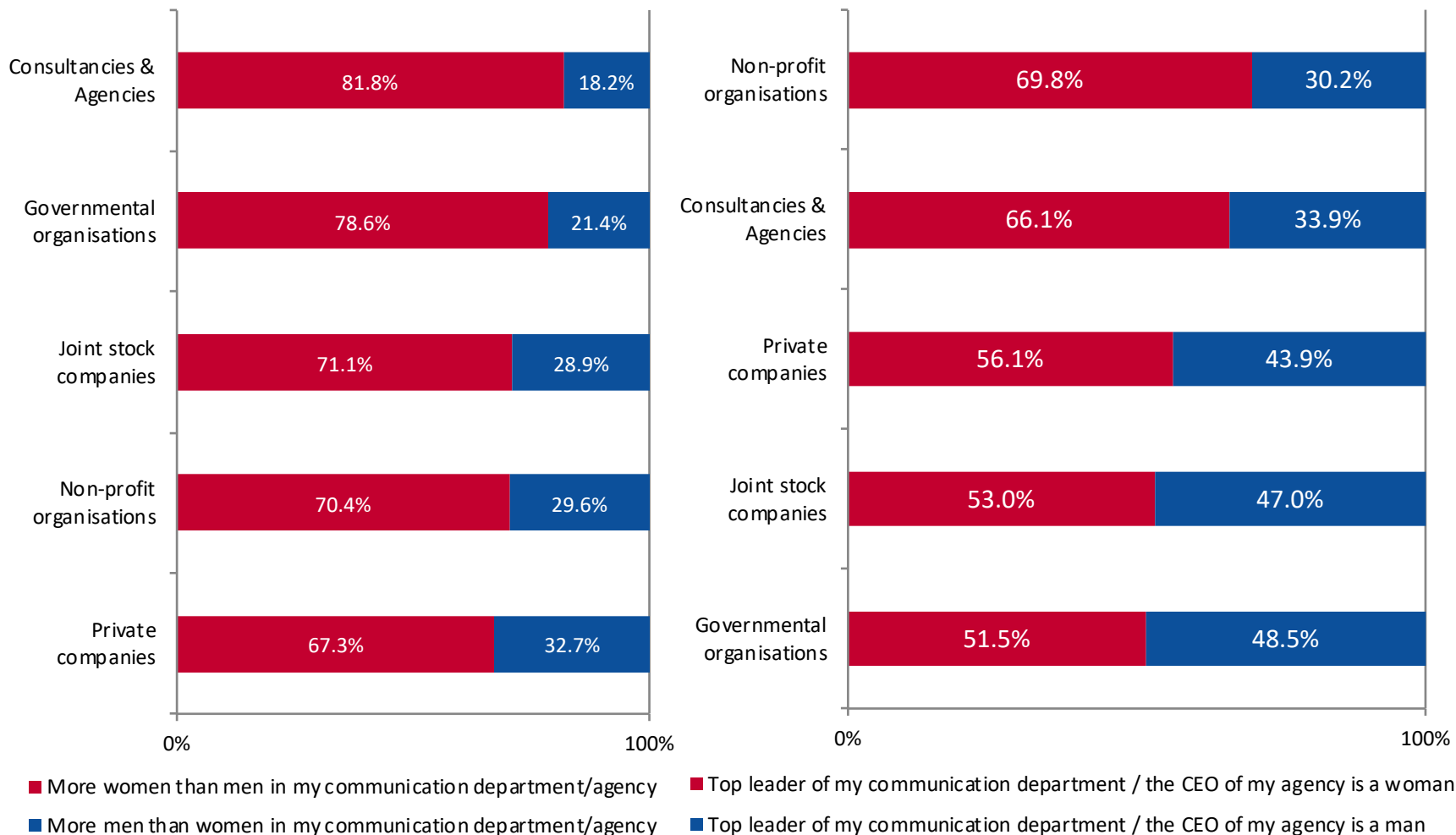
Practitioners working in communication departments and agencies



Top leaders of communication departments and agencies

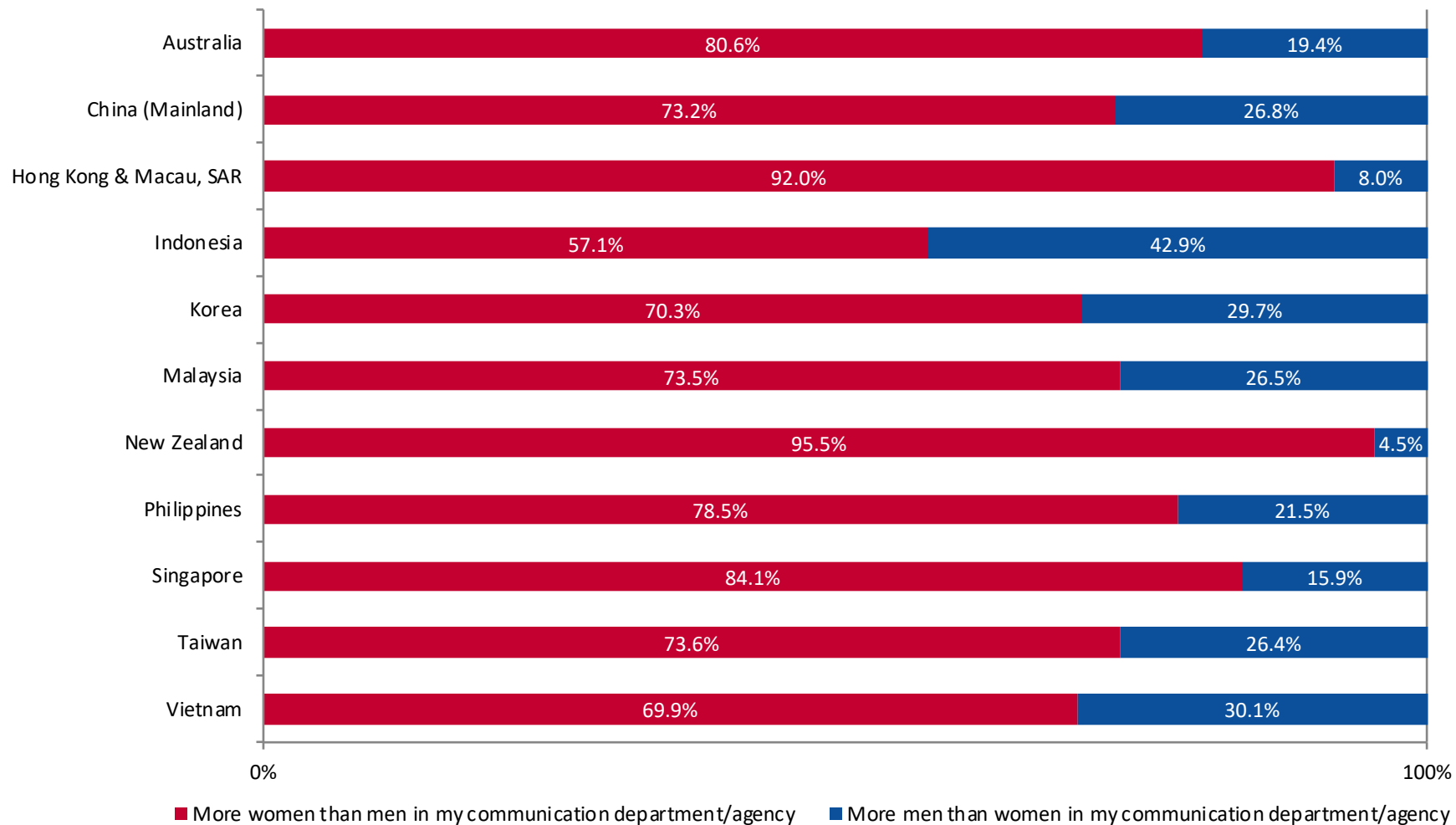


Female communicators are predominant in all types of organisations – female leadership is strongest in non-profits



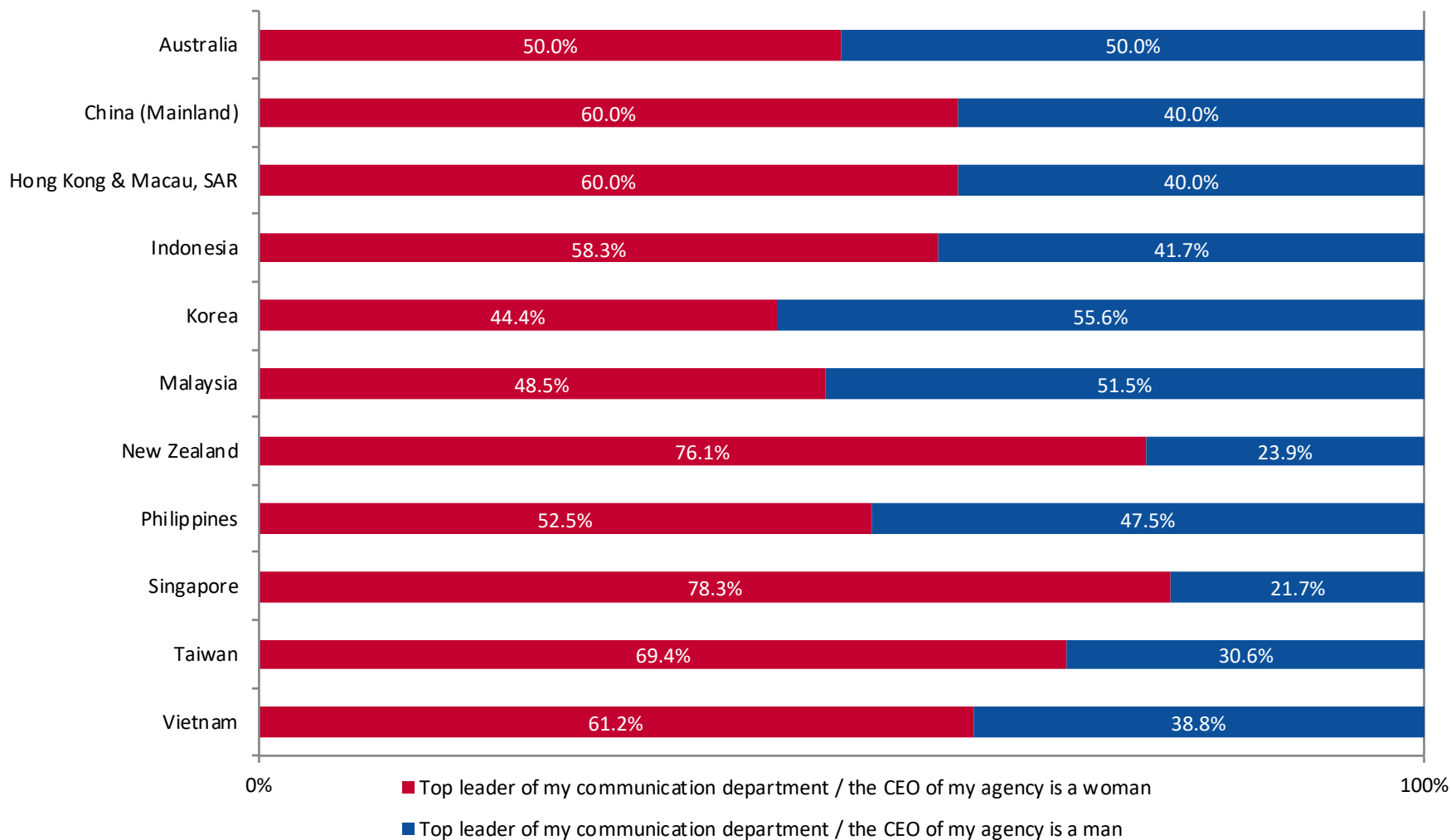
www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,062 communication professionals. Q 28: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. Highly significant differences between various types of organisations (chi-square test, p ≤ 0.01).

More than 95 per cent of all departments and agencies in New Zealand are dominated by female professionals, compared to only 57 per cent in Indonesia



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,033 communication professionals from 11 countries and territories. Q28: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. Highly significant differences between countries (chi-square test, $p \leq 0.01$).

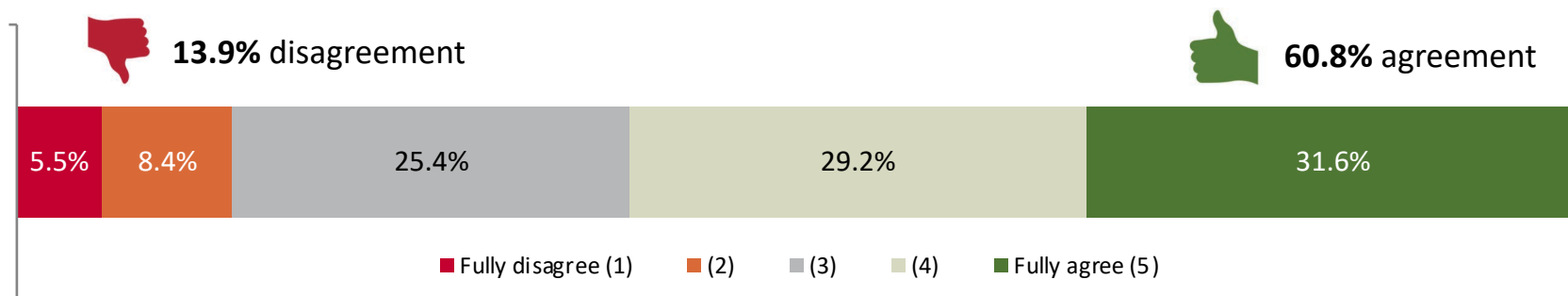
Female leadership in communication is strong in New Zealand, Singapore and Taiwan, while Malaysia, Philippines and Korea are lagging behind



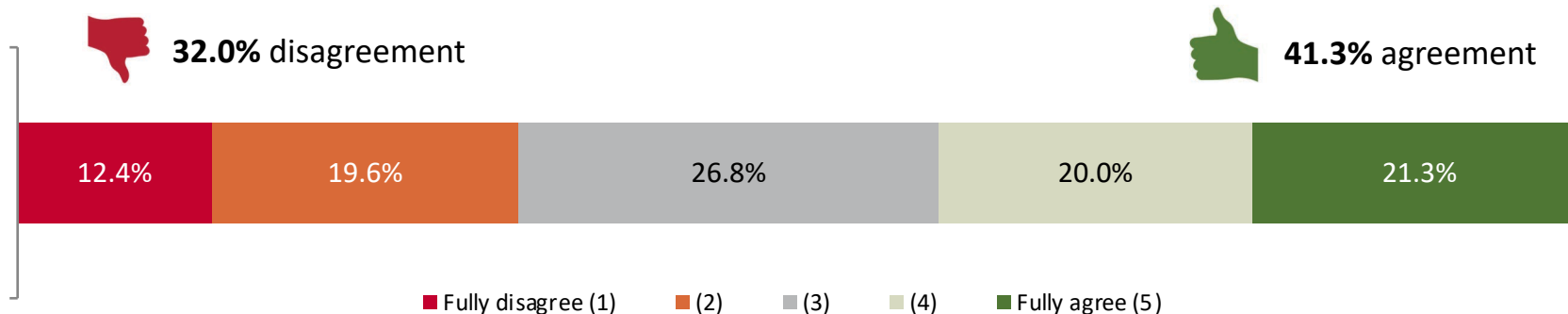
www.communicationmonitor.asia / Macnamara et al. 2021 / n = 1,058 communication professionals from 11 countries and territories. Q28: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. Highly significant differences between countries and territories (chi-square test, $p \leq 0.01$).

Most communicators in Asia-Pacific agree that gender equality has improved, but mixed opinions on whether enough is done to support women in the field

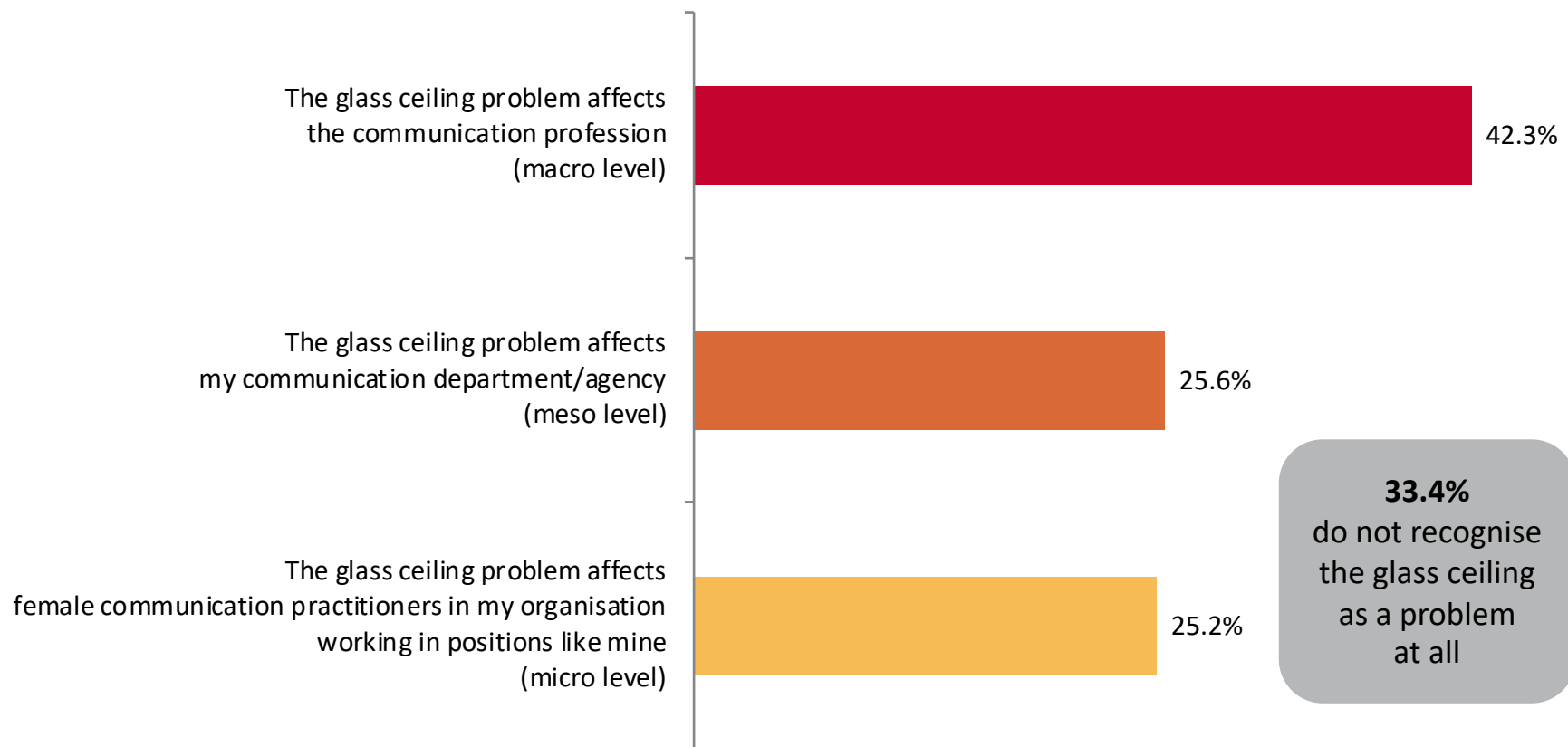
“Gender equality in communication has improved within the last five years in my country.”



“Enough is done to support women in communication in my country.”



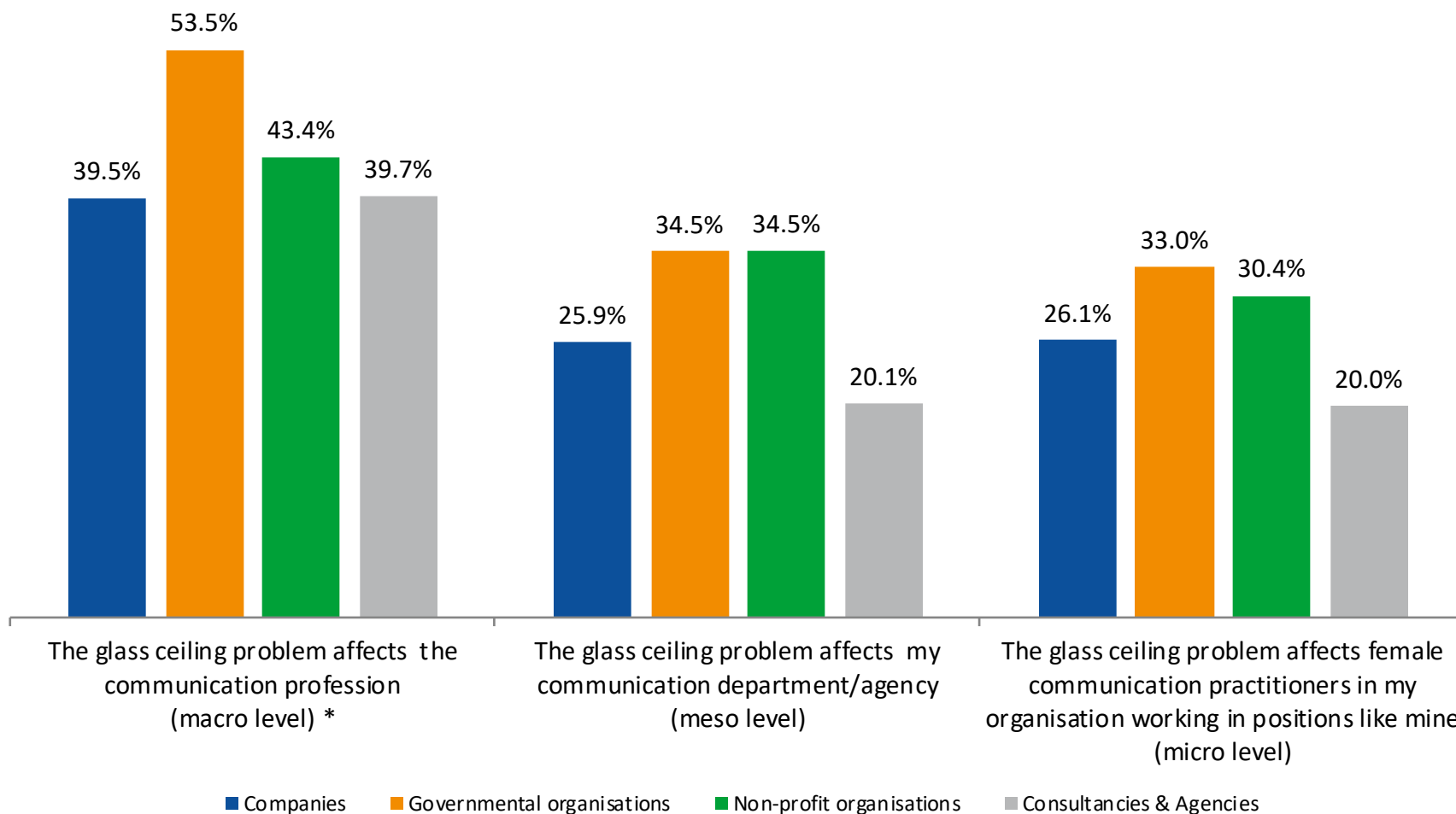
Four out of ten communication practitioners in Asia-Pacific recognise a glass ceiling problem in the profession, but only one in four report it in their own environment



Glass ceiling
 = an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy

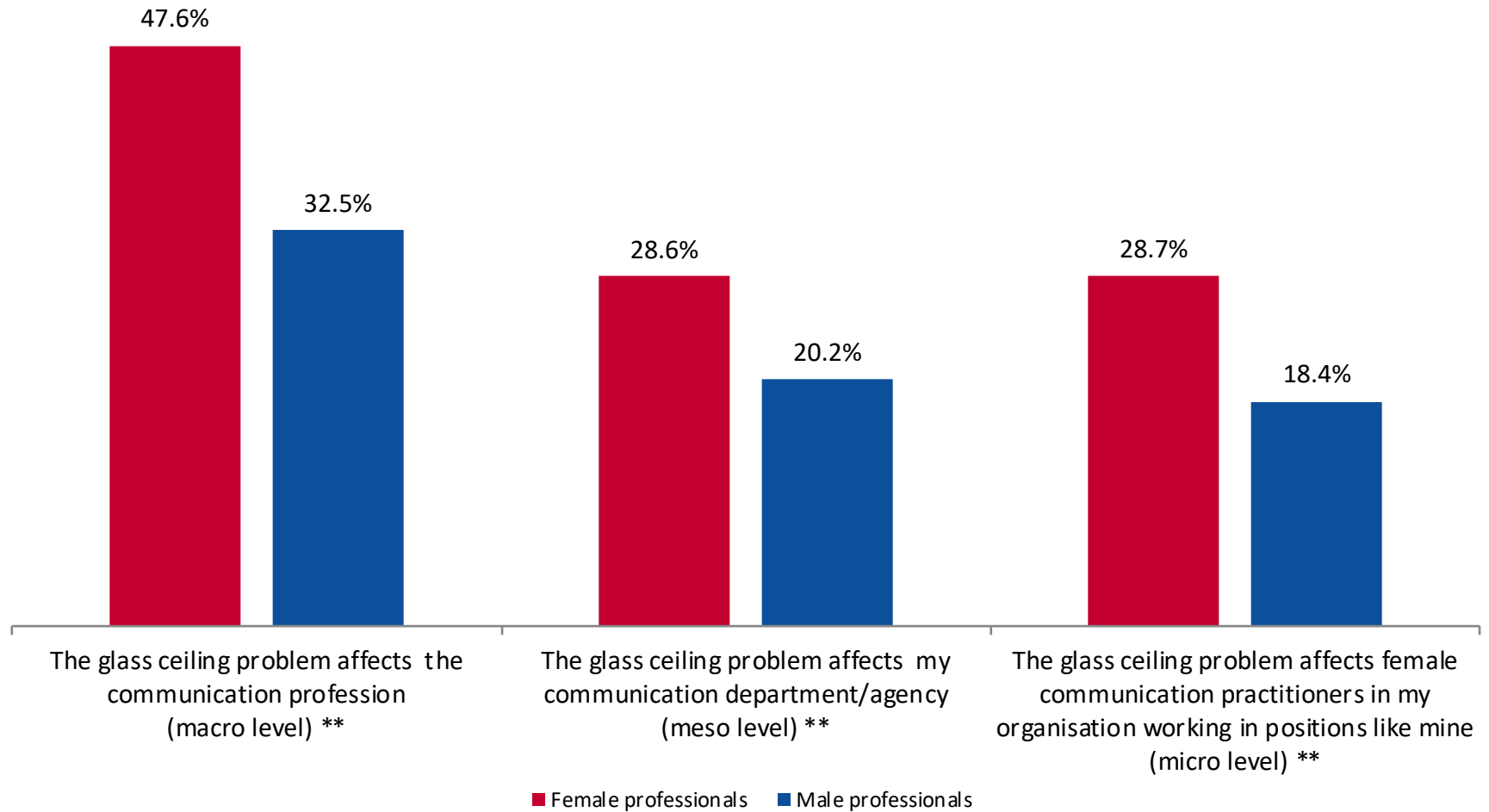
www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,088 communication professionals. Q.5a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. Not recognizing the problem at all = respondents who disagreed with all three items (scale points 1-2).

Differences across various types of organisations: A glass ceiling problem is perceived as most relevant in governmental organisations



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,088 communication professionals. Q 5a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. * Significant differences (chi-square test, p ≤ 0.05).

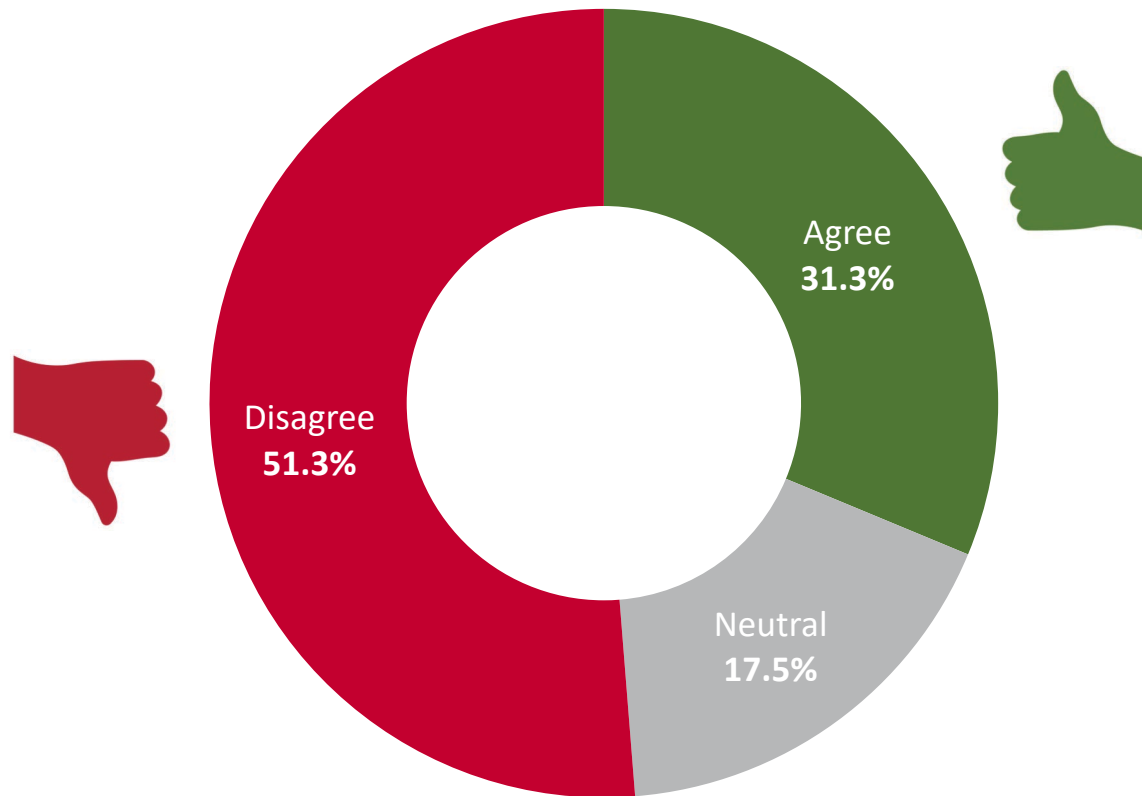
Female professionals are much more aware of unacknowledged barriers for promotion on the macro, meso, and micro level than their male colleagues



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 1,086 communication professionals. Q 5a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

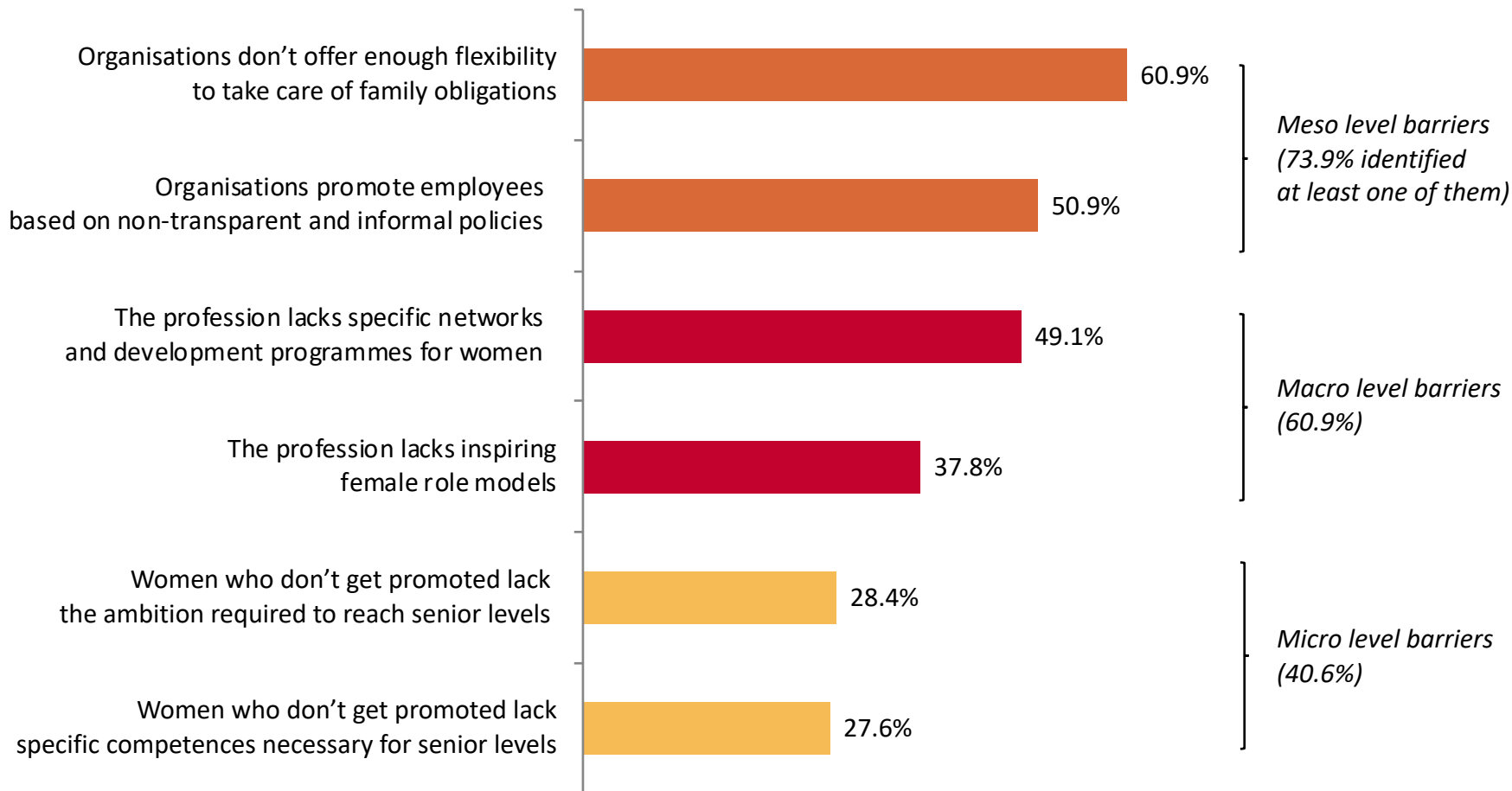
Every third female communication practitioner in Asia-Pacific states that she is personally affected by an invisible barrier keeping her from rising to another career level

The glass ceiling problem affects me personally



Factors hindering women from reaching top positions in communication: Organisational barriers are most important

Reasons for the glass ceiling in the communication profession



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 532 communication professionals. Q6: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5.

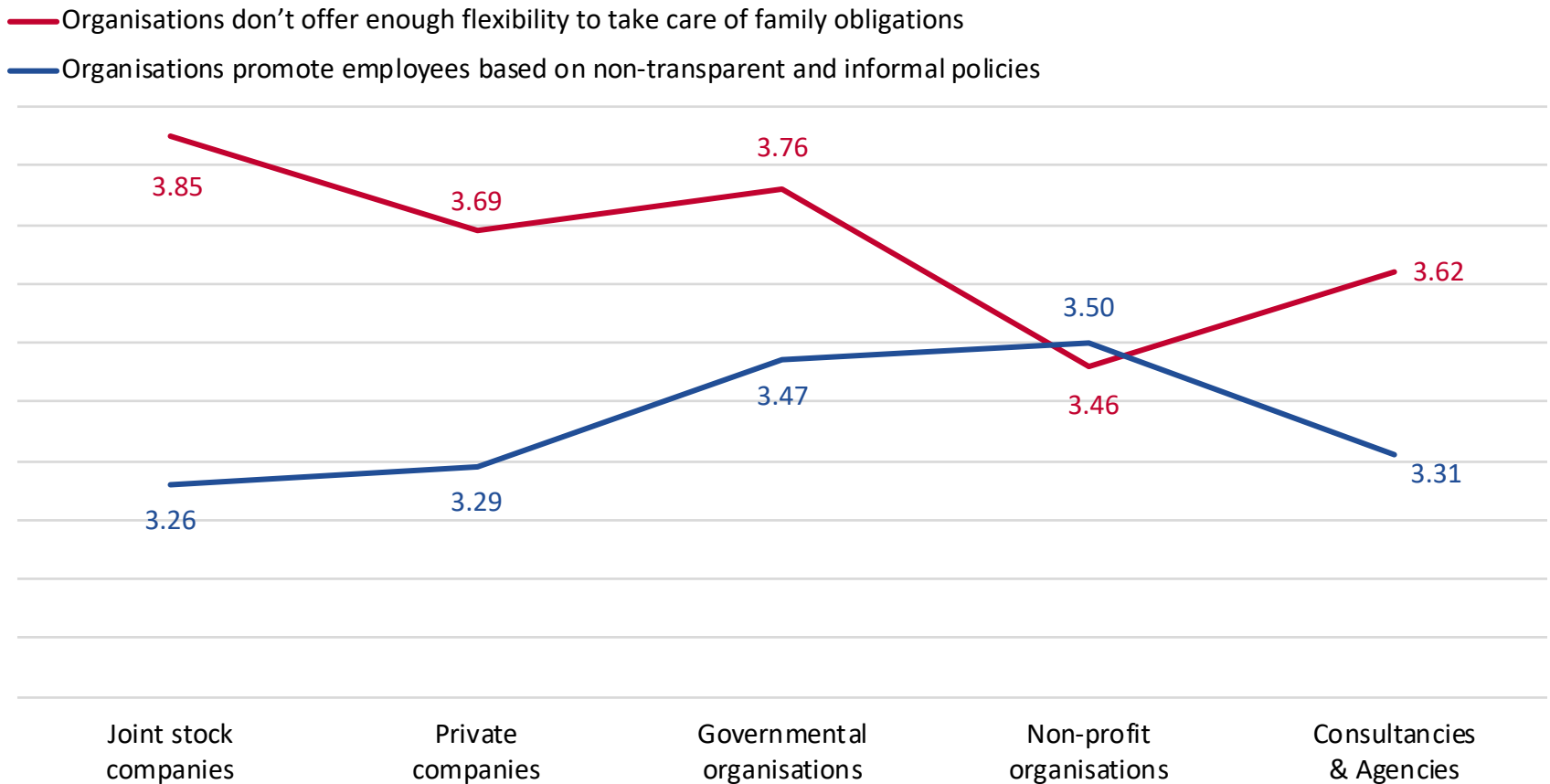
Assessment of reasons for the glass ceiling problem in Asia-Pacific

	Women who don't get promoted lack specific competences necessary for senior levels	Women who don't get promoted lack the ambition required to reach senior levels	Organisations promote employees based on non-transparent and informal policies	Organisations don't offer enough flexibility to take care of family obligations	The profession lacks specific networks and development programmes for women	The profession lacks inspiring female role models
Australia	9.5%	9.5%	57.1%	61.9%	42.9%	4.8%
China (Mainland)	32.9%	40.0%	51.4%	62.9%	51.4%	38.6%
Hong Kong & Macau, SAR	14.3%	14.3%	48.6%	60.0%	42.9%	37.1%
Indonesia	42.9%	37.1%	37.1%	45.7%	45.7%	40.0%
Korea	22.6%	24.2%	53.2%	66.1%	48.4%	58.1%
Malaysia	36.8%	26.3%	45.6%	66.7%	45.6%	43.9%
New Zealand	20.0%	16.7%	66.7%	63.3%	26.7%	30.0%
Philippines	25.8%	30.3%	53.0%	66.7%	54.5%	30.3%
Singapore	14.6%	20.8%	62.5%	62.5%	60.4%	35.4%
Taiwan	33.3%	36.1%	47.2%	52.8%	47.2%	33.3%
Vietnam	36.8%	38.6%	40.4%	54.4%	61.4%	33.3%

www.communicationmonitor.asia / Macnamara et al. 2021 / n = 517 communication professionals from 11 countries and territories. Q6: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5.

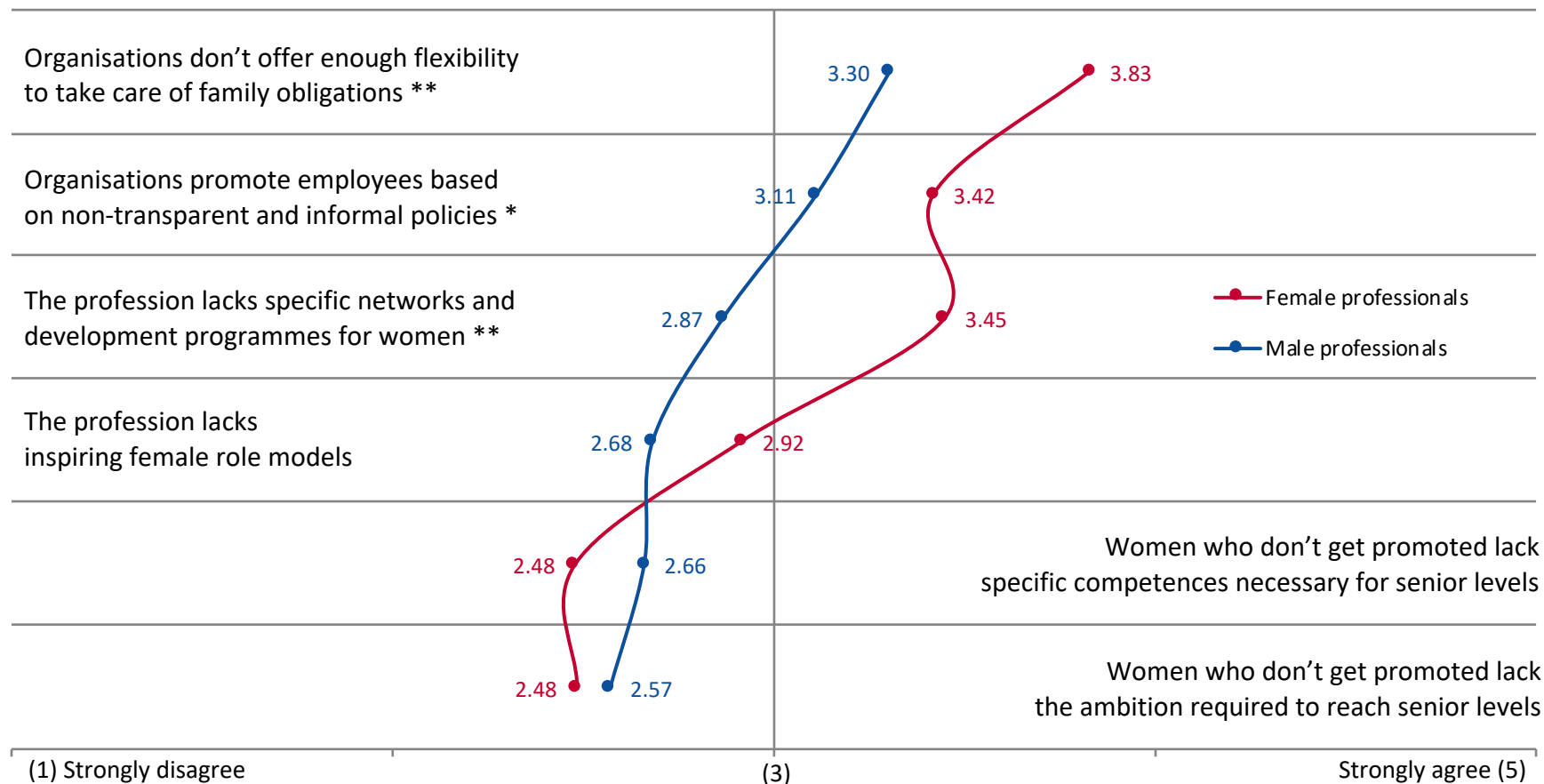
Non-profits are non-transparent and informal in their promotion policies, while companies and governmental organisations lack flexibility

Organisational factors which hinder women from reaching top positions in communication



Female practitioners report stronger barriers at organisational and professional levels than men's perception

Factors assumed to hinder women from reaching top positions in communication

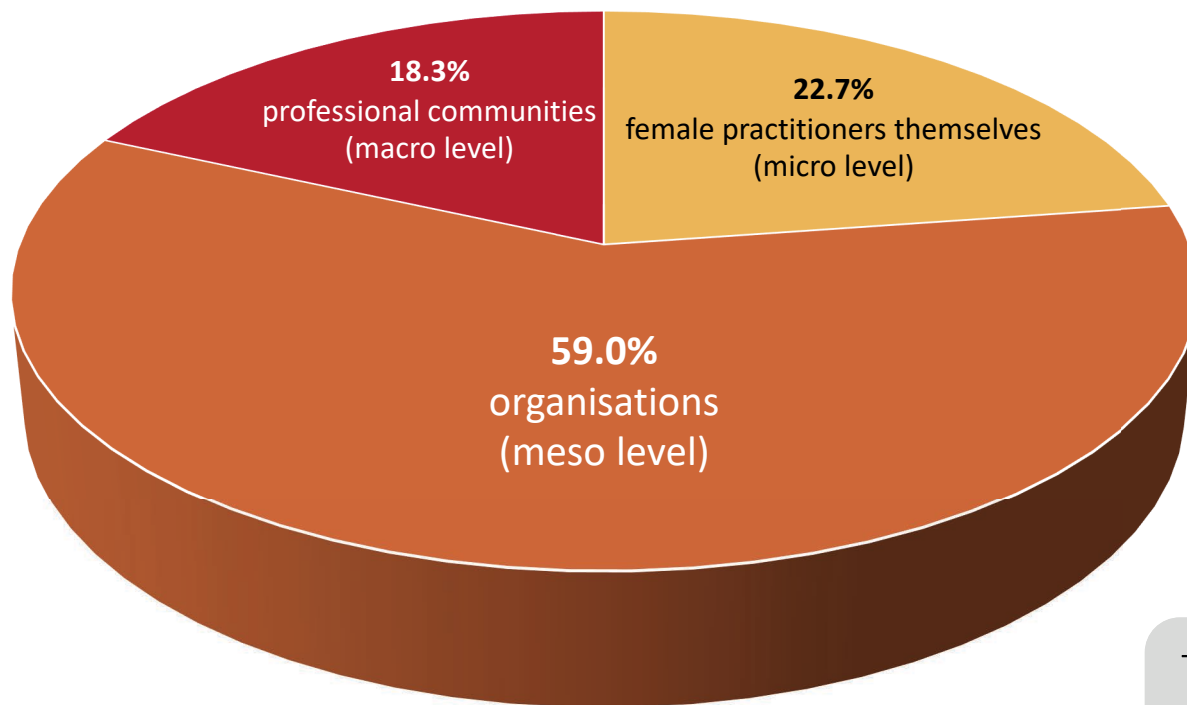


www.communicationmonitor.asia / Macnamara et al. 2021 / n = 530 communication professionals. Q6: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values.

** Highly significant differences (independent samples T-Test, $p \leq 0.01$). * Significant differences (independent samples T-Test, $p \leq 0.05$).

Overcoming the glass ceiling in communication: A clear majority believes that organisations have the greatest influence on the issue

Agents assumed to be most capable to change the current situation of women in communication



The most relevant barriers hindering women from reaching top positions were also identified on the **organisational level** (p. 73)

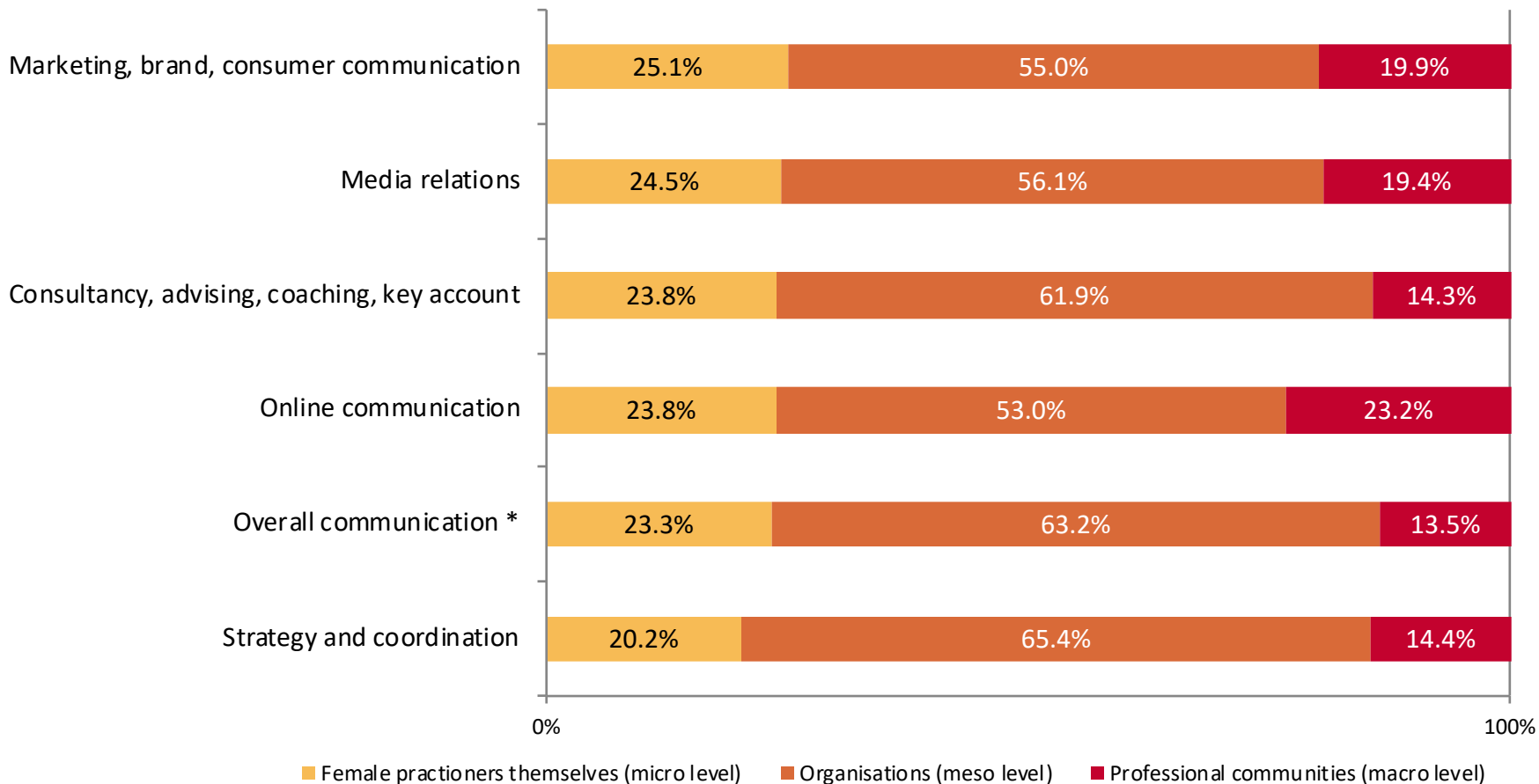
Perceived capability of different agents to break the glass ceiling in Asia-Pacific

	Female practitioners themselves (micro level)	Organisations (meso level)	Professional communities (macro level)
Australia	4.8%	76.2%	19.0%
China (Mainland)	32.9%	52.6%	14.5%
Hong Kong & Macau, SAR	16.7%	58.3%	25.0%
Indonesia	51.4%	28.6%	20.0%
Korea	15.9%	74.6%	9.5%
Malaysia	19.0%	62.1%	19.0%
New Zealand	6.7%	86.7%	6.7%
Philippines	15.2%	69.7%	15.2%
Singapore	13.7%	72.5%	13.7%
Taiwan	24.3%	59.5%	16.2%
Vietnam	39.7%	22.4%	37.9%

www.communicationmonitor.asia / Macnamara et al. 2021 / n = 531 communication professionals from 11 countries and territories. Q7: And who do you think is most capable of changing the current situation of women in communication? Female practitioners themselves (e.g. by enhancing their competencies and motivation) / Organisations (e.g. by changing structures and cultures) / Professional communities (e.g. by uniting and supporting female practitioners).

Communication generalists emphasise responsibility of organisations, while online communicators stress stewardship of professional associations more often

Agents assumed to be most capable to change the current situation of women in communication



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 546 communication professionals. Q 7: And who do you think is most capable of changing the current situation of women in communication? Female practitioners themselves (e.g. by enhancing their competencies and motivation) / Organisations (e.g. by changing structures and cultures) / Professional communities (e.g. by uniting and supporting female practitioners). * Significant differences (chi-square test, $p \leq 0.05$).

Characteristics of
excellent communication
departments



Characteristics of excellent communication departments

The 2020 survey used a method introduced in the 2015 and 2017 APCM surveys (Macnamara et al., 2015) to identify the most excellent communication departments in the sample. The approach combines self-assessments by communication professionals with statistical analyses. This differs from normative concepts of excellence (Grunig, 1992; Grunig et al., 2002), but leads to comparable overall results (Verčič & Zerfass, 2016).

The assessment of excellence is based on the internal standing of the communication department within the organisation (*influence*) as well as the external results of the communication department's activities in addition to its basic qualifications (*performance*). The two factors were assessed on the basis of four dimensions. Assessment of influence is based on advisory influence (where senior management takes recommendations of the communication function seriously) and executive influence (where communication is invited to senior-level meetings for strategic planning). Assessment of performance is based on overall communication success (where the communication of the organisation is successful) and department competence (where the quality of the communication function is better than competing and similar organisations). Only organisations clearly outperforming in all four dimensions are classified as excellent in this analysis.

Based on this method, 26.9% of the sampled departments across Asia-Pacific were assessed as excellent. In breaking down the excellence components, in terms of influence the communication departments, non-profits (34.5%) and joint-stock companies lead the field (34.5 %), while private companies (25.8 %) and governmental organisations lag (19.0 %).

When assessing the link between excellence and organisational effects, the results show that excellent communication departments do a better job in a number of facets of communication management, including macro-level ethical codes of practice (78%). Excellent communication departments also report less problems with gender inequalities across all levels. As a result, female professionals working in excellent communication departments feel less affected by a 'glass ceiling' hindering their career plans.

Practitioners in excellent departments report significantly higher levels of competencies in all dimensions. This includes competence in all five dimensions of communication, management, business, technology, and data.

Excellent communication departments demonstrate stronger human resource structures. Staff members of excellent communication departments have better management skills and invest significantly more in training. Hence, a smaller skills gap exists in excellent communication departments as a result of more work time invested in training and personal development.

Also, excellent departments (compared to other departments) place greater emphasis on the need cope with the digital evolution and social web, utilisation of big data or algorithms for communication, and to exploring new methods of content creation and distribution as a top three issue for the field in the near future.

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

(Q16)

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

EXECUTIVE INFLUENCE

(Q17)

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

SUCCESS

(Q18)

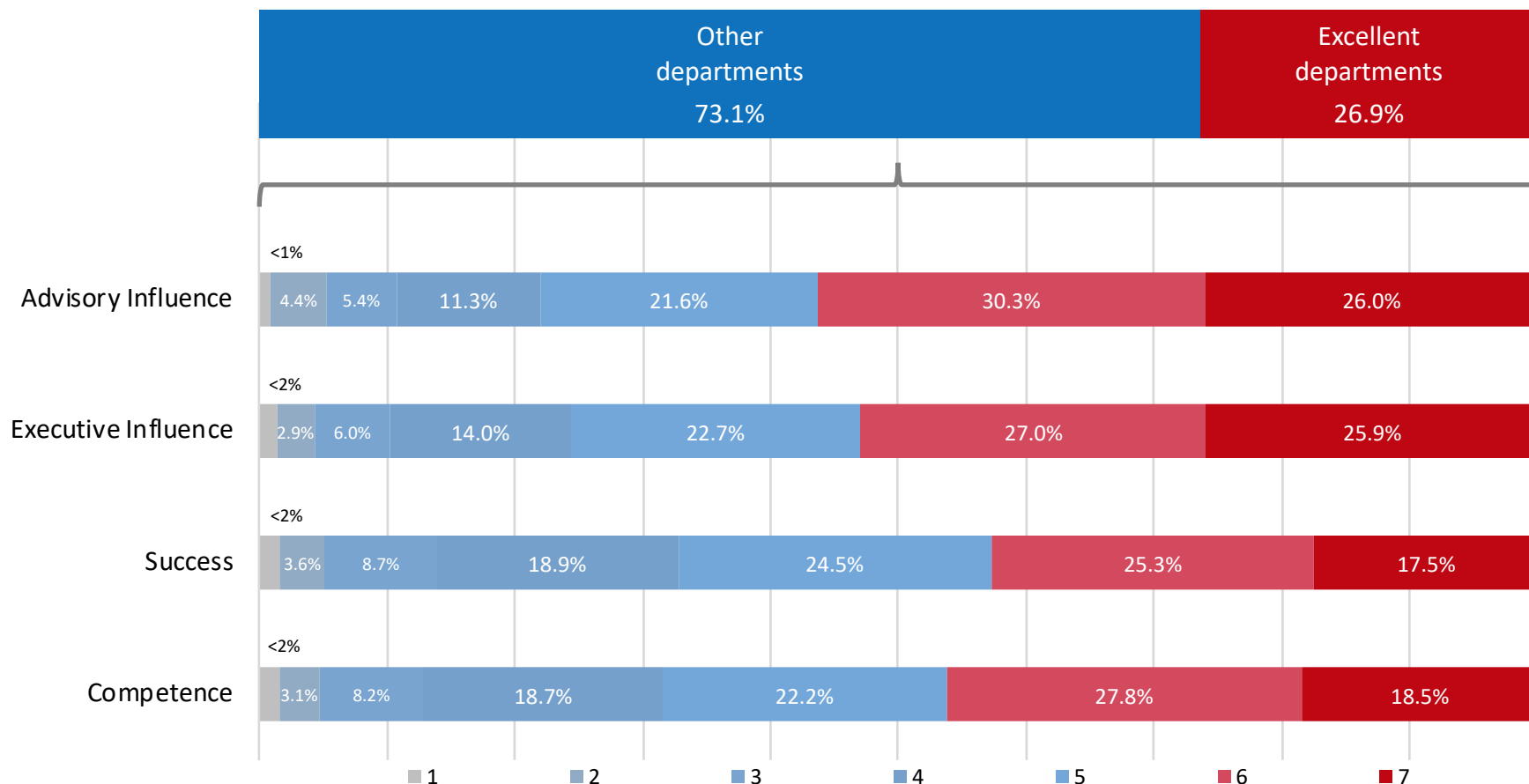
The communication of the organisation is (much) more successful compared to those of competing organisations

COMPETENCE

(Q19)

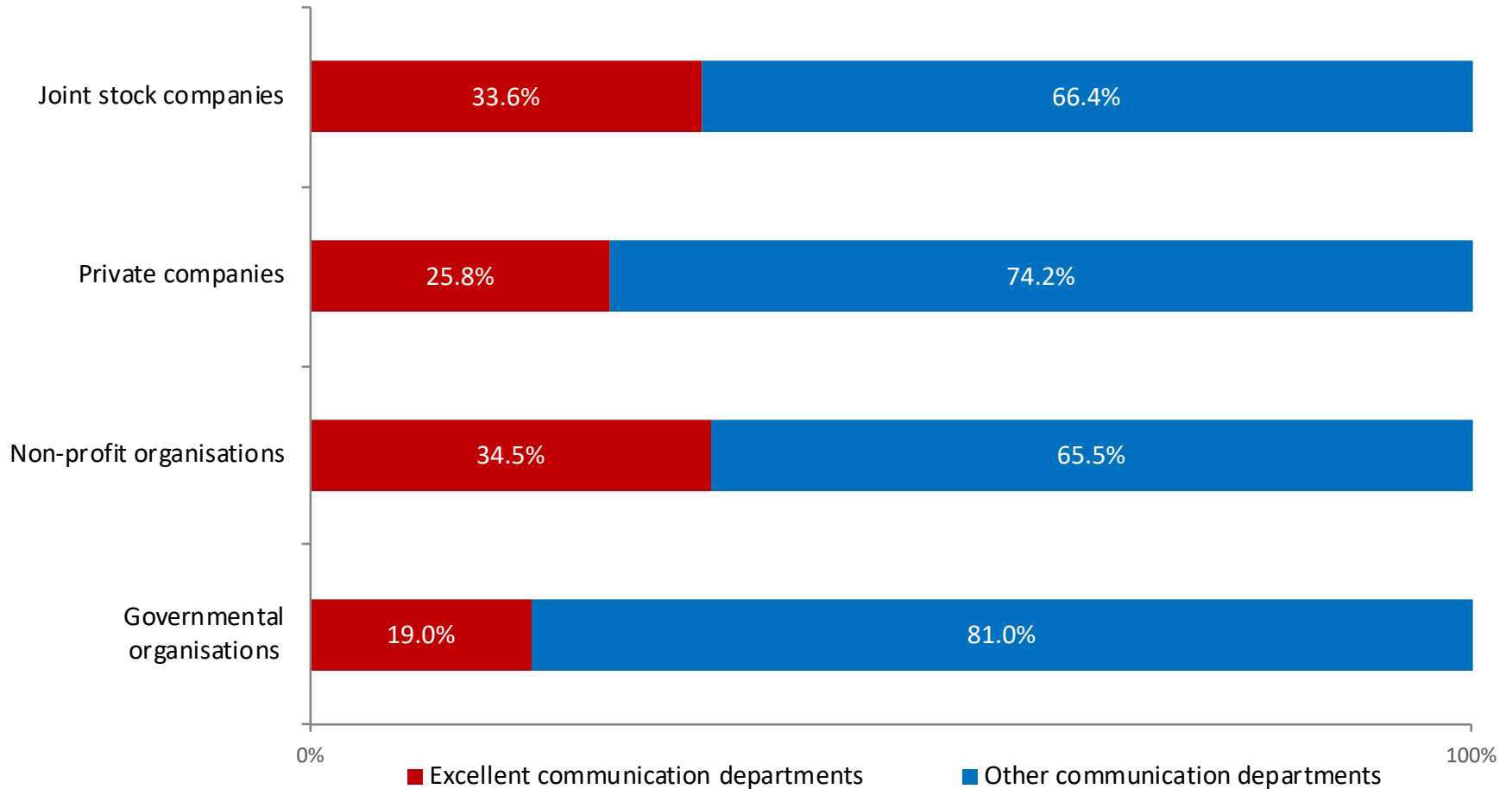
The quality and ability of the communication function is (much) better compared to those of competing organisations

Excellent communication departments in the sample



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 699 communication professionals in communication departments. Advisory influence, Q 16: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (Not seriously at all) – 7 (Very seriously). Executive influence, Q 17: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (Never) – 7 (Always). Success, Q 18: In your opinion, how successful is the communication of your organisation compared to competitors? Scale 1 (Not successful at all) – 7 (Very successful). Competence, Q 19: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 (Much worse) – 7 (Much better). Percentages: Excellent communication departments based on scale points 6-7 for each item.

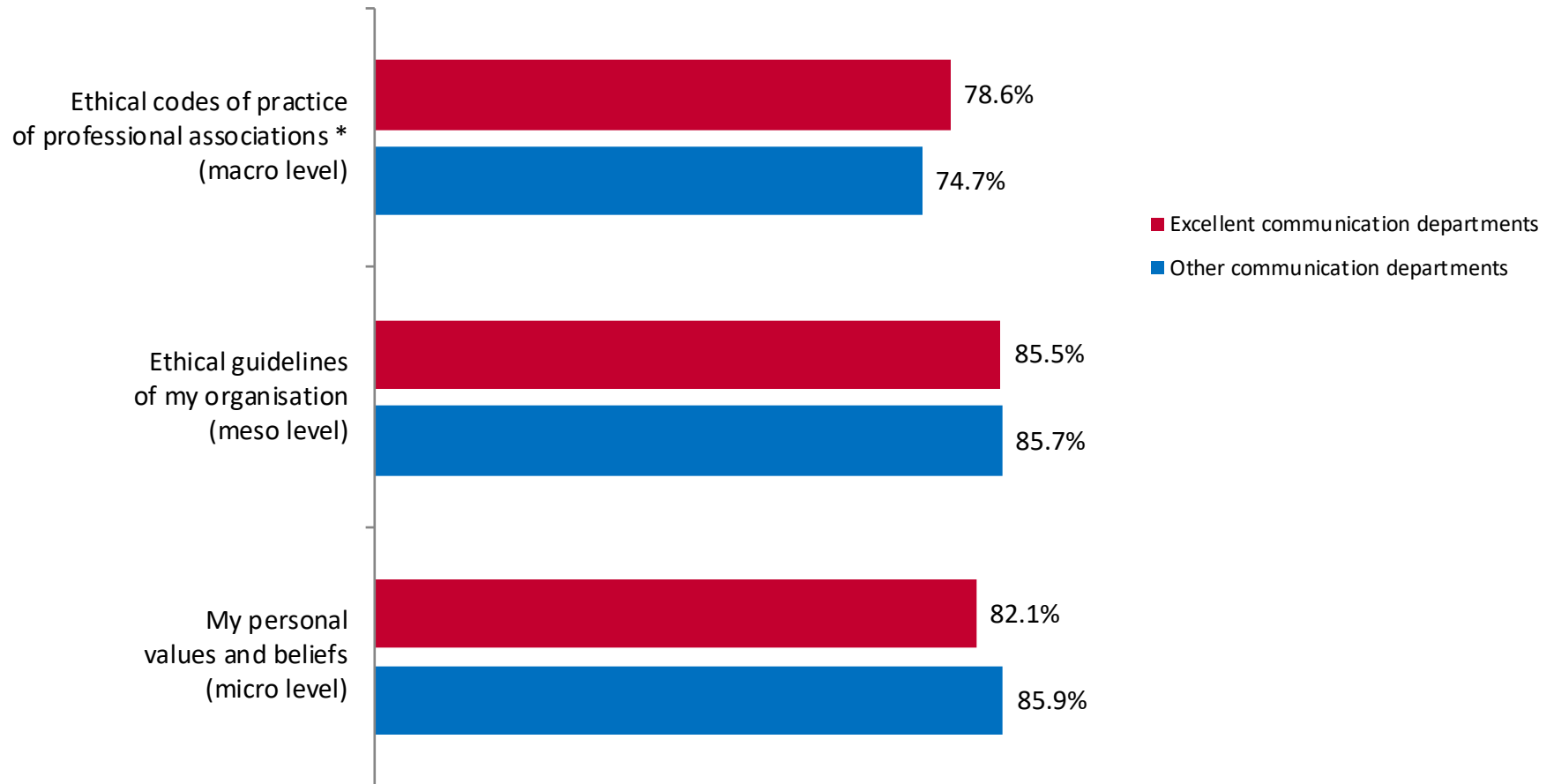
Excellence in different types of organisation



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 699 communication professionals in communication departments. Advisory influence, Q 16: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 17: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 18: In your opinion, how successful is the communication of your organisation compared to competitors? Q 19: 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 departments based on scale points 6-7 for each question.

Communicators working in excellent departments utilise ethical guidelines by professional associations more often when dealing with moral dilemmas

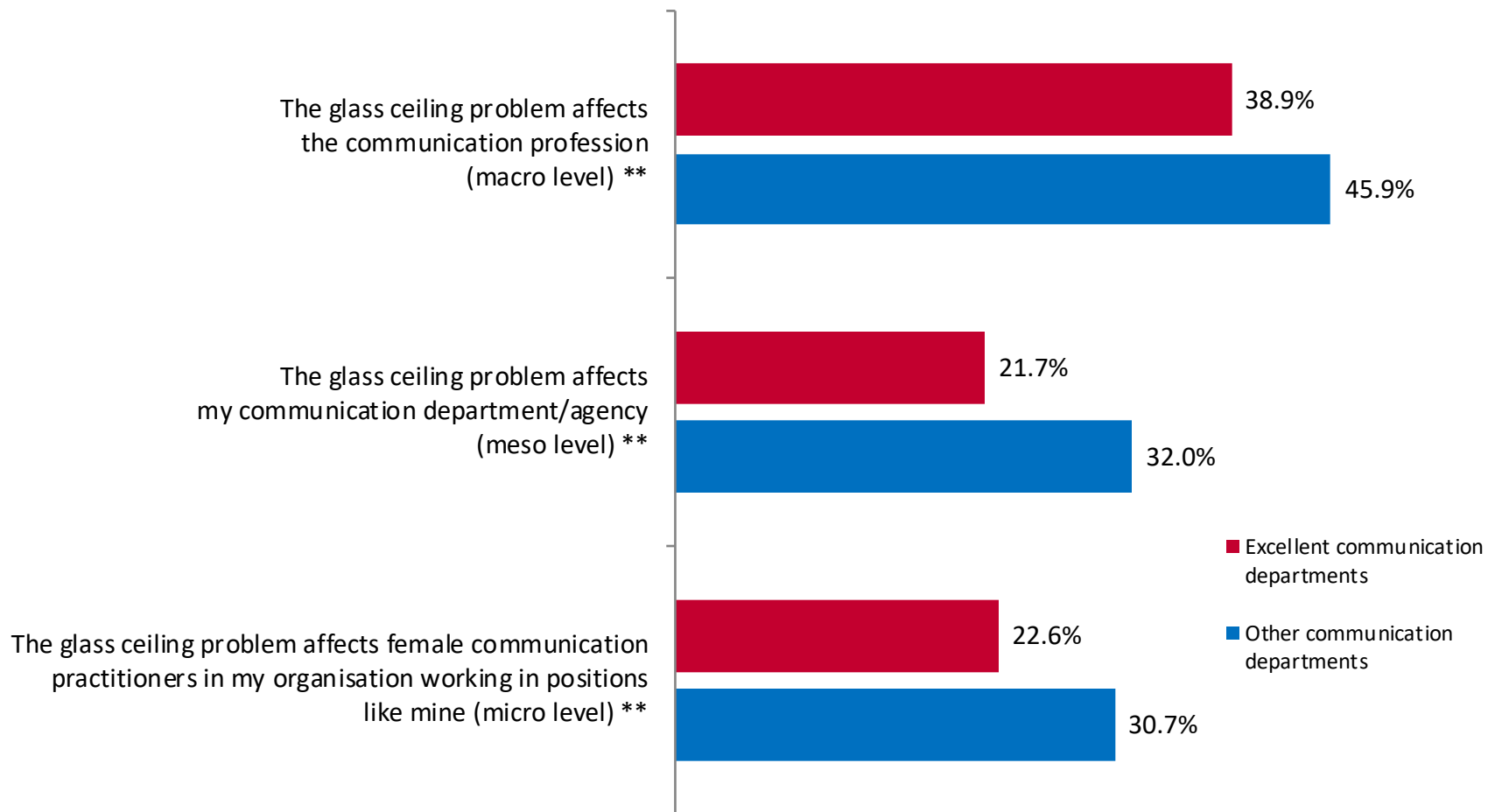
Resources used for dealing with ethical challenges



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 353 communication professionals in communication departments. Q2: How important were the following resources to you when dealing with ethical challenges? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5.

* Significant differences between excellent and other communication departments (chi-square test, $p \leq 0.05$).

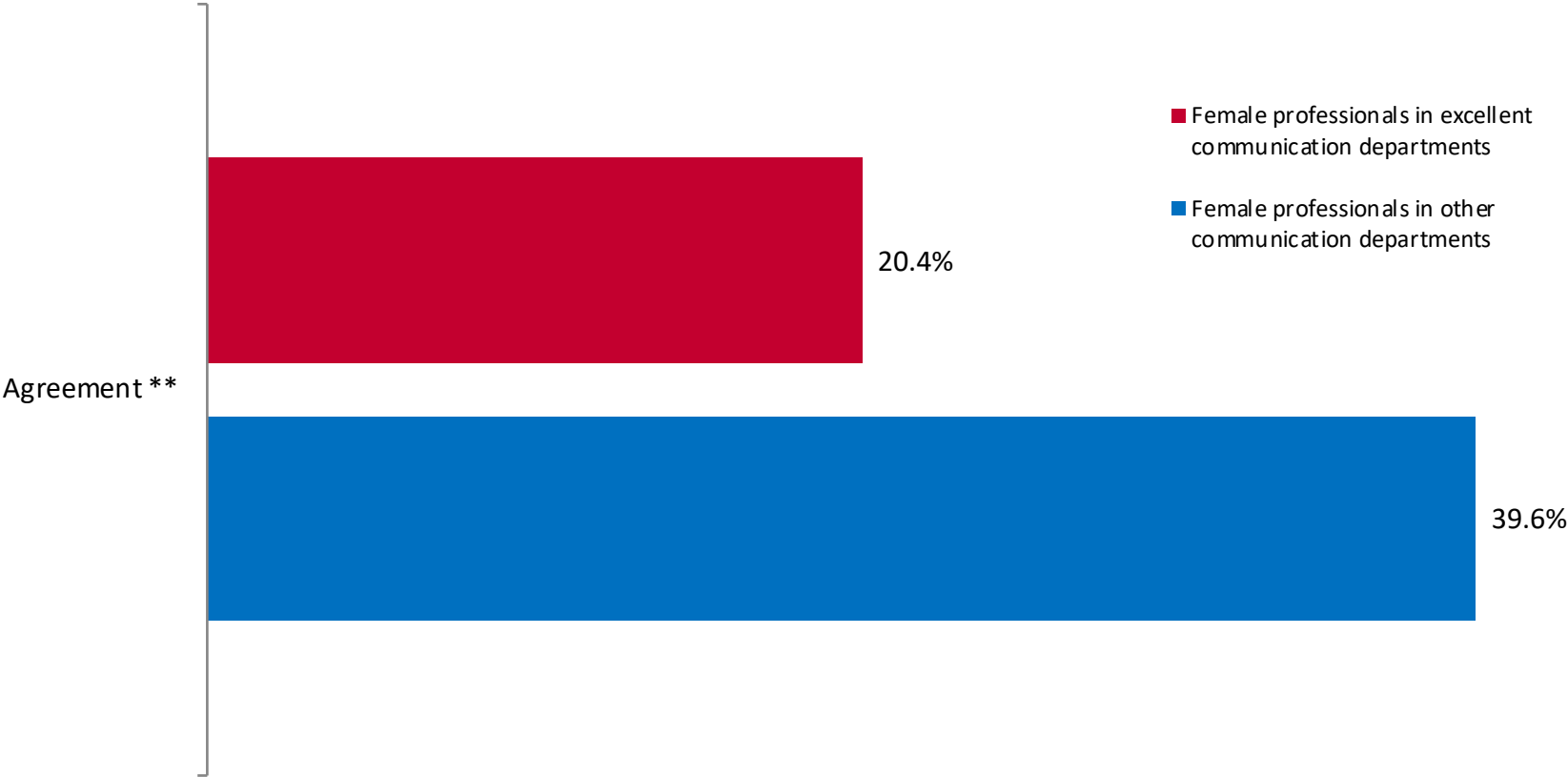
Communication practitioners working in excellent departments report less problems with gender inequalities across all levels



www.communicationmonitor.asia / Macnamara et al. 2021 / n ≥ 521 communication professionals in communication departments. Q5a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences between excellent and other communication departments (chi-square test, $p \leq 0.01$).

Female professionals working in excellent communication departments feel less affected by a glass ceiling problem hindering their career plans

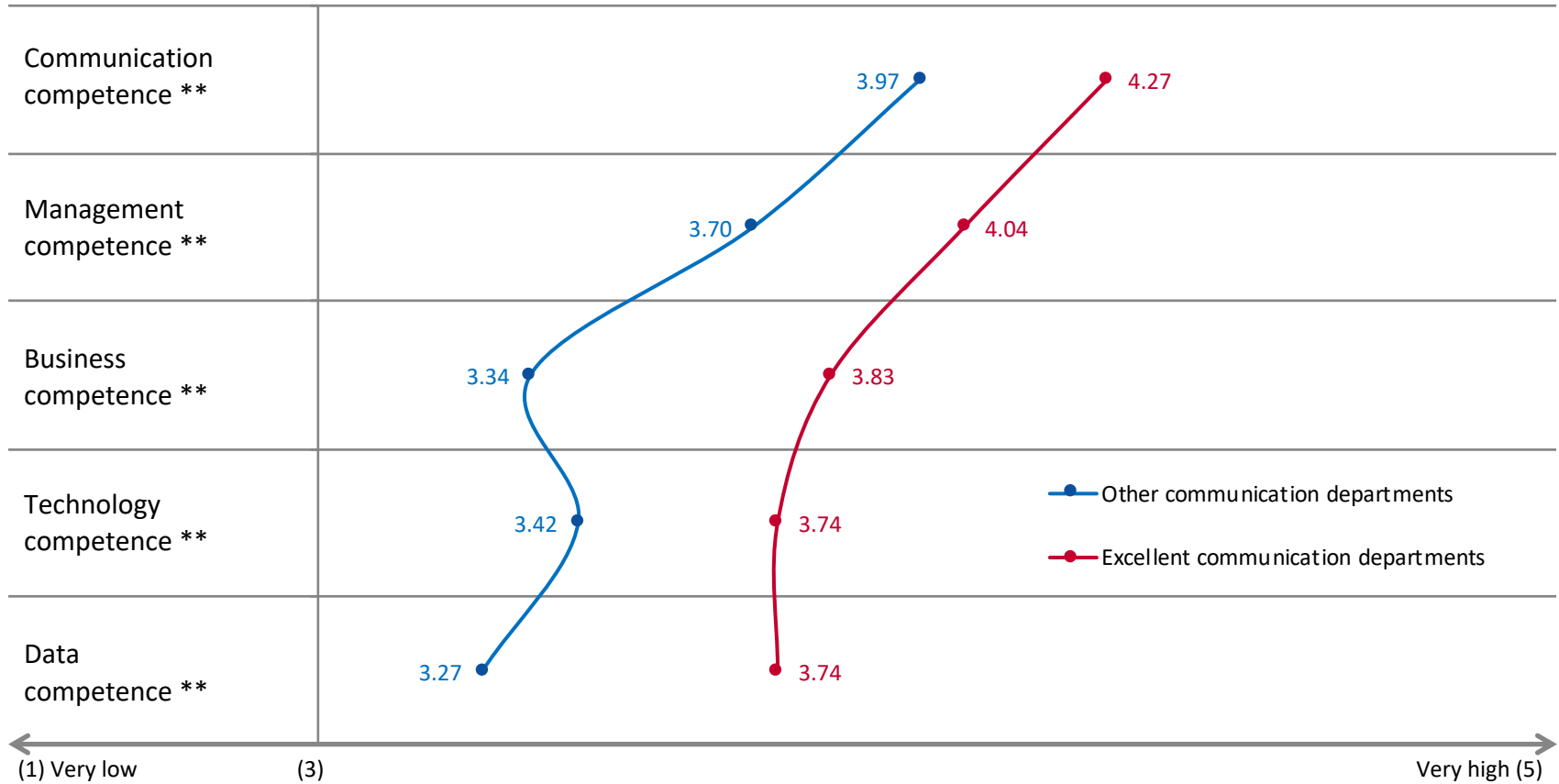
The glass ceiling affects me personally



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 521 female communication professionals in communication departments. Q 5b: And what about you personally? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences between excellent and other communication departments (chi-square test, $p \leq 0.01$).

Practitioners in excellent departments report significantly higher levels of competencies in all dimensions

Personal assessment of competency levels by communication professionals



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 693 communication professionals in communication departments. Q10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values.

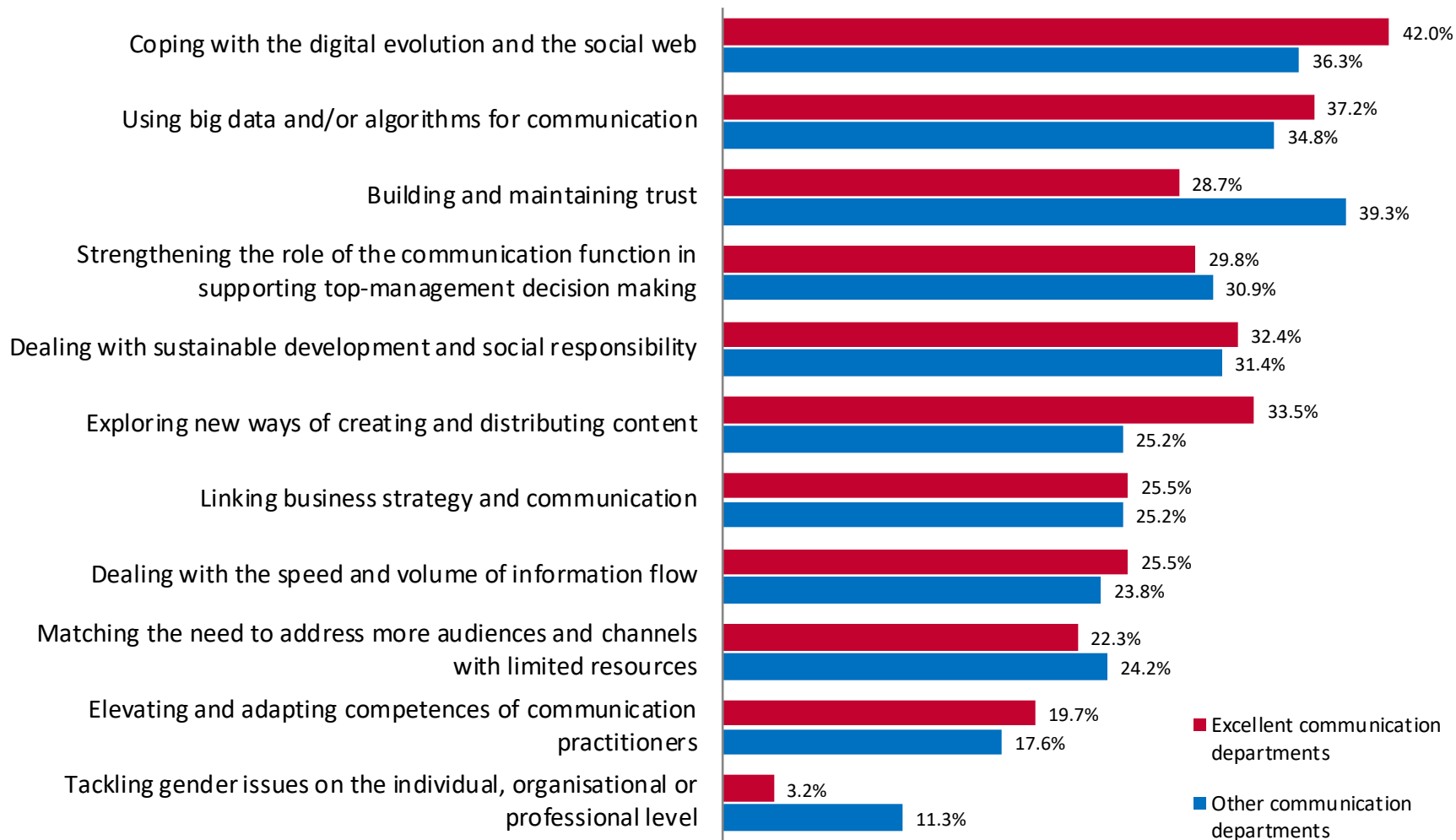
** Highly significant differences between excellent and other communication departments (independent samples T-Test, $p \leq 0.01$).

Smaller skills gap in excellent communication departments – probably because more work time is invested in training and personal development

	All communication departments	Other communication departments	Excellent communication departments
	<i>Share of (critically) underskilled practitioners in key competence fields</i>		
Communication competence	49.2%	54.2%	38.2%
Management competence	49.9%	53.4%	44.1%
Business competence	51.3%	57.3%	47.3%
Technology competence	52.2%	52.6%	46.2%
Data competence	56.4%	60.3%	47.3%
	<i>Full days spent on personal training and development per year</i>		
Work time spent on personal training / development	12.8 days	13.5 days	14.4 days
Free time spent on personal training / development	9.6 days	11.4 days	8.4 days
Overall training days in 2019	22.4 days	24.9 days	22.8 days

www.communicationmonitor.asia / Macnamara et al. 2021 / n = 692 communication professionals in communication departments. Q 10: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. See p. 31 for calculation of skill gaps and share of (critically) underskilled practitioners / n ≥ 440 communication professionals in communication departments. Q 24: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days)? Q 25: And how many of these days were your free time that you have invested (weekends, holidays, evenings, ...)?

Excellent departments emphasise the need to explore new ways of content creation and distribution as a top three issue for the field in the near future



www.communicationmonitor.asia / Macnamara et al. 2021 / n = 700 communication professionals in communication departments. Q8: 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.

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COMMUNICATION DIRECTORS



Asia-Pacific Association of Communication Directors (APACD)

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

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More information

A large selection of material based on the Asia-Pacific Communication Monitor (APCM) surveys including web videos highlighting key results and articles explaining key insights are available on the internet. Similar surveys with valuable data reports on the web are conducted in other regions of the world since 2007 – the European Communication Monitor (ECM), Latin American Communication Monitor (LACM) and North American Communication Monitor (NACM). Visit our website to get more information!

www.communicationmonitor.asia

The screenshot shows the homepage of the Asia-Pacific Communication Monitor website. At the top, it states "ASIA-PACIFIC COMMUNICATION MONITOR - THE LARGEST STUDY ON STRATEGIC COMMUNICATION AND PUBLIC RELATIONS IN THE REGION". It lists the organizing body as the Asia-Pacific Association of Communication Directors, and partners including Eupretra, Truescope, and PProvoke. The main headline is "Exploring communication trends in Asia-Pacific." Below this, it mentions the 2020 survey will provide insights into current challenges and upcoming trends. There are sections for "Previous APCM Reports", "APCM Videos", and "APCM Publications". At the bottom, it lists the "Core research professors and team" and provides contact information for Jim Macnamara, UTS University of Technology Sydney.

The cover of the 2015/2016 report features a red and white design with a map of Asia-Pacific. The title is "ASIA-PACIFIC COMMUNICATION MONITOR 2015/2016". Below the title, it says "THE STATE OF STRATEGIC COMMUNICATION AND PUBLIC RELATIONS IN A REGION OF RAPID GROWTH. SURVEY RESULTS FROM 23 COUNTRIES." The main image shows the report cover with the title "The present and future of strategic communication in Asia Pacific" in large blue letters. Below the title, it says "Seven starting points for discussion for this year's first Asia-Pacific Communication Monitor".

The cover of the Public Relations Review journal features a white background with a tree illustration and the Elsevier logo. The title is "Public Relations Review". Below the title, it says "'PESO' media strategy shifts to 'SOEP': Opportunities and ethical dilemmas" and lists the authors: "Jim Macnamara^{a,b}, May Lwin^b, Ana Adi^c, Ansgar Zerfass^d".

The cover of the 2017/2018 report features a red and white design with a map of Asia-Pacific. The title is "ASIA-PACIFIC COMMUNICATION MONITOR 2017/2018". Below the title, it says "STRATEGIC CHALLENGES, SOCIAL MEDIA AND PROFESSIONAL CAPABILITIES. RESULTS OF A SURVEY IN 22 COUNTRIES." The main image shows the report cover with the title "Satisfaction guaranteed?" in large blue letters. Below the title, it says "How communication professionals in Asia Pacific assess their work situation." and "BY MAY O. LWIN AND ANSGAR ZERFASS".

The cover of the "Satisfaction guaranteed?" report features a white background with a blue star and a map of Asia-Pacific. The title is "Satisfaction guaranteed?". Below the title, it says "How communication professionals in Asia Pacific assess their work situation." and "BY MAY O. LWIN AND ANSGAR ZERFASS".

The Asia-Pacific Communication Monitor (APCM) is an international research initiative conducted by the Asia-Pacific Association of Communication Directors (APACD) and the European Public Relations Education and Research Association (EUPRERA) in partnership with Truescope, Nanyang Technological University and PProvoke.

The biannual study is conducted with the aim to stimulate and promote the knowledge and practice of communication management in the region.

More than 6,000 communication professionals from over 80 countries are surveyed in each wave of the European, Latin American, Asia-Pacific and North American Communication Monitor, making this the largest and only truly global study of the profession based on sound empirical standards.

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