

PR AND COMMUNICATION MANAGEMENT IN ASIA-PACIFIC: TRENDS, GROWTH AND GAPS

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ABSTRACT

With a number of Asia-Pacific countries among the fastest growing in the world, the requirements for public relations and communication management are also growing in terms of both demand and professionalism. It is essential that practitioners and academics keep pace with demand and achieve 'international best practice'. In 2015/16, the largest ever survey of PR and communication management in Asia-Pacific was launched as a biannual study, with the second survey undertaken in 2017/18. The survey is modelled on similar studies that have been conducted in Europe since 2007, in Latin American since 2014, and North America from 2018, allowing international comparison. This analysis examines key findings of the latest Asia-Pacific survey and compares results with the 2015/16 Asia-Pacific study as well as with international data to identify trends, areas of growth in professional practice, and gaps and shortcomings to be addressed. The findings are informative for educators, professional associations, and practitioners in terms of the design of undergraduate and graduate courses and ongoing training and professional development.

Keywords: Public relations, PR, communication management, strategic communication, Asia-Pacific

SCOPE OF THE STUDY

Public relations (PR) and closely related fields of practice such as corporate communication, which are often collectively referred to as communication management (L. Grunig, J. Grunig & Dozier, 2002; van Ruler & Verčič, 2005) or strategic communication (Hallahan, Holtzhausen, van Ruler, Verčič, Sriramesh, 2007; Verhoeven, Zerfass, & Tench, 2011), are reported to be growing at around 10 per cent a year in developed markets and by up to 20 per cent a year in fast-developing markets (ICCO, 2013). The Holmes Report estimated PR to be a US\$15 billion industry in 2016 (Sudhaman, 2017). Major Asia-Pacific countries including China and India as well as a number of south-eastern Asian countries are widely recognized as among the fastest growing markets in the world. For example, a study of the growth and development of PR in India reported that “public relations is the most modern and the fastest growing branch of communications, barring the Internet and the mobile (cell) phone” (Valanilam, 2011, p. 46).

However, relative to the United States (US), United Kingdom (UK), and European countries, PR and communication management are less studied in Asia-Pacific, despite the size and growth of the region, and the local context is often not fully explored, as noted by Hou (2016).

In 2015/16, a group of Asia-Pacific universities working in collaboration with European academics and industry associations in Asia-Pacific set out to address this research gap and gain a deeper understanding of practices, trends and issues affecting PR and communication management in Asia Pacific. Based on the European Communication Monitor (ECM), an annual survey launched more than 10 years ago and now conducted in up to 50 European countries, and the Latin America Communication Monitor (LCM) launched in 2014, the first Asia-Pacific Communication Monitor (APCM) was conducted in 2015/16 and was repeated in 2017/18 as a biannual study. As further explained under ‘Methodology’, the study involves a large-scale structured survey of practitioners in more than 20 Asia Pacific countries.

This article reports the key findings of the latest APCM (Macnamara, Lwin, Adi, & Zerfass, 2017) and compares results with the 2015/16 Asia-Pacific study (Macnamara, Lwin, Adi, & Zerfass, 2015), as well as international data to identify trends, areas of growth in professional practice, as well as gaps and shortcomings to be addressed. The findings are informative for educators, professional associations, and practitioners in terms of the design of undergraduate and graduate courses and ongoing training and professional development.

LITERATURE FRAMING THE STUDY

This study is informed by contemporary public relations and communication management theory, as well as the growing body of literature on digital and social media, which provide a context for examination of PR and communication management practices today. In particular, PR Excellence theory (Grunig et al., 2002; J. Grunig, L. Grunig & Dozier, 2006)¹; dialogic theory of PR (Taylor & Kent, 2014); corporate communication theory (Agenti, 2016; Cornelissen, 2011); and the increasing focus on strategic communication (Falkheimer & Heide, 2015; Hallahan et al., 2007; Volk, Berger, Zerfass, Bisswanger, Fetzer, & Köhler, 2017) provide a framework for analysing contemporary PR and communication practice. Excellence theory advocates two-way communication and symmetry between an organization and its stakeholders and environment as the most effective and ethical approach. Dialogic theory of PR takes the concept of two-way interaction further to emphasize dialogue between organizations and their stakeholders and publics, particularly in social media (Kent, 2013; Macnamara & Zerfass, 2012; Wright & Hinson, 2017). Contemporary corporate communication theory highlights the importance of an organization being “adaptive” to its environment as well as serving pre-determined objectives of management (Cornelissen, 2011, p. 83). Strategic communication theory similarly advocates alignment of PR and corporate communication to organizational objectives as well as its stakeholders and the environment in which it operates, particularly when based on *emergent* strategy (King, 2010; Mintzberg & Waters, 1985) or other contemporary approaches such as *participatory* strategy (Falkheimer & Heide, 2015).

In addition, given the specific regional focus on this study, research literature on the development of PR and communication management in Asia-Pacific forms an important backdrop and context (Halff & Gregory, 2014; Sriramesh & Verčič, 2009; Watson, 2014). This identifies that distinct culturally-specific practices are enacted in Asia-Pacific countries, but that because of globalization in trade, media, and international relations, theories, models and practices are also adopted across countries through knowledge sharing and emerging standards and principles of best practice.

These theories are well-documented and discussed in a wide range of extant literature including the works cited above, so they will not be outlined in detail here.

Comparisons with practices in other countries are based on the ECM, particularly the most recent study in 2017 (Zerfass, Moreno, Tench, Verčič, & Verhoeven, 2017) and the most recent Latin America Communication Monitor (Moreno, Molleda, Athaydes, & Suarez, 2017).

METHODOLOGY

The APCM is a regional online survey of PR and corporate communication practitioners modelled on the ECM study that has been conducted annually since 2007 (e.g., Zerfass, Verčič,

Verhoeven, Moreno, & Tench, 2015; Zerfass, Verhoeven, Moreno, Tench, & Verčič, 2016; Zerfass et al., 2017). The APCM study was conducted for the first time in 2015/16 through a collaboration of European and Asia-Pacific universities with support from a number of industry organizations in Asia-Pacific.

The sample is accessed from more than 20,000 communication practitioners in Asia-Pacific whose contact details are held in a database of the Asia-Pacific Association of Communication Directors (APACD) and who are invited to participate via e-mail invitation. Additional invitations are distributed by supporting universities and professional PR and communication associations in the region to their members. This participant recruitment approach provides sampling validity, as the questionnaire is made available to pre-qualified participants across a wide range of PR and communication management roles and functions. The online survey is pre-tested in each round in at least half of the participating countries, with amendments made where appropriate.

In 2015/16 a total of 2,154 participants started the survey, with 1,200 submitting fully completed questionnaires, an initial participation rate of almost 10% and a completion rate of 5%. Only completed survey questionnaires were used in the analysis. The countries with the largest number of participants were India, Australia, Singapore, Hong Kong and China, followed by Vietnam, Thailand, and Malaysia.

In 2017/18, 3,647 participants started the survey. Incomplete surveys and responses from outside the sample were deleted from the dataset. This resulted in 1,306 fully completed responses from communication professionals in 22 Asia-Pacific countries, which was made up of all the major economies in the region including China, India, Taiwan, Thailand, Indonesia, Japan, Korea, Vietnam, Australia, New Zealand, Hong Kong and Singapore.

Participants comprise mostly senior communication professionals working in corporations, government, non-profit organizations, and communication agencies. For example, in the 2017/18 survey, three out of four participants were communication leaders, with 36.8 per cent holding a position as head of communication or CEO of a communication consultancy, and 35.6 per cent working as unit leaders or in charge of a single communication discipline in an organization. Participants are also quite experienced, with an average age of 45.0 years and 59.9 per cent having more than 10 years of experience in communication management. Reflecting 'feminization' of the PR field (Aldoory, 2007), 57.7 per cent of responses were from women and 42.3 per cent were from men.

Participants in the study are highly educated, with almost half (48.7 per cent) of participants in 2017/18 holding a Master's degree and 41.4 per cent holding a Bachelor's degree. A further 4.5 per cent hold a doctorate. One fifth of the participants (20.0 per cent) work in multinational organizations with their origin in Asia-Pacific. Another 26.6 per cent represent multinational organizations headquartered in another continent, while 43.7 per cent work in national or local organizations.

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

A similar demographic profile of participants was achieved in 2015/16. Therefore, the study reports the views of experienced, well-educated, senior practitioners in the region.

The survey questionnaire used in 2015/16 and 2017/18 contained 26 questions arranged in 14 themed sections, although some questions were different in 2017/18 to address emerging issues identified in the 2015/16 study and in other research literature in the field of PR and communication management. The instrument was based largely on the ECM, which provided criterion validity and also afforded some international comparative data.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results were tested statistically with, depending on the variable, Pearson's chi-square tests (χ^2), ANOVA/Scheffe post-hoc tests, Kendall rank correlation, and *t*-tests, Results were classified as significant ($p \leq 0.05$) or highly significant ($p \leq 0.01$).

RESEARCH QUESTIONS

The empirical data reported and discussed here are presented in response to four research questions drawn from the APCM as follows.

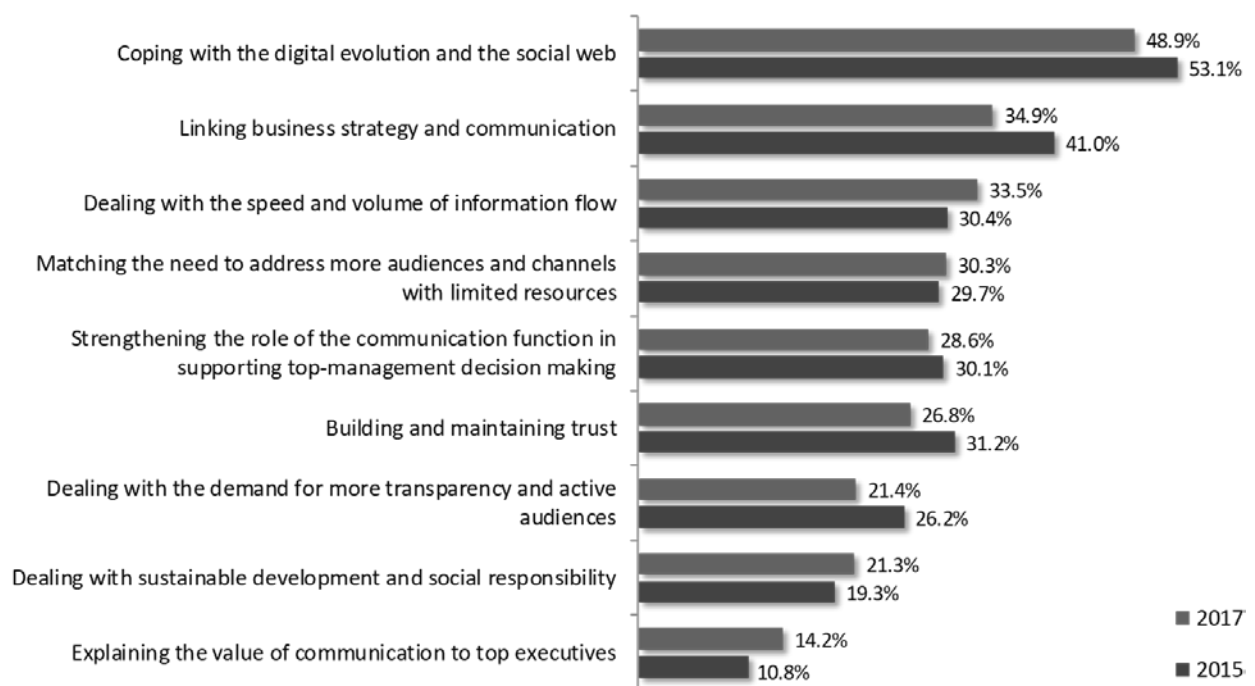
- RQ1. Overall, what are the most important issues facing PR and communication practitioners in Asia-Pacific?
- RQ2. What are the most important media and communication channels used for PR and communication management in Asia-Pacific today?
- RQ3. What will be the most important media and communication channels for PR and communication management in Asia-Pacific over the next three years?
- RQ4. How do PR and communication practices in Asia-Pacific compare with those in other countries in terms of issues and challenges facing the field, media and communication channels used, and other factors?

KEY FINDINGS

As in 2015/16, PR and communication practitioners in Asia-Pacific reported that 'coping with the digital evolution and the social web' is the most important issue facing the sector in 2017/18

(*RQ1*). While the proportion of practitioners citing this as the major issue fell slightly in 2017/18 compared with 2015/16, digitalization remains the dominant concern and focus (see Figure 1). A related issue, ‘dealing with the speed and volume of information flow’ was the third most highly rated issue facing practitioners and ‘using big data and/or algorithms for communication’ was the fourth most cited issue in the 2017 survey (this was not asked in the previous study). Digitalization and related practice requirements are seen as particularly important in Malaysia, Hong Kong, India, the Philippines, Indonesia, Taiwan and Thailand, but are rated highly across the region.

Figure 1. Most importance issues facing professional communicators 2015 to 2017.



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

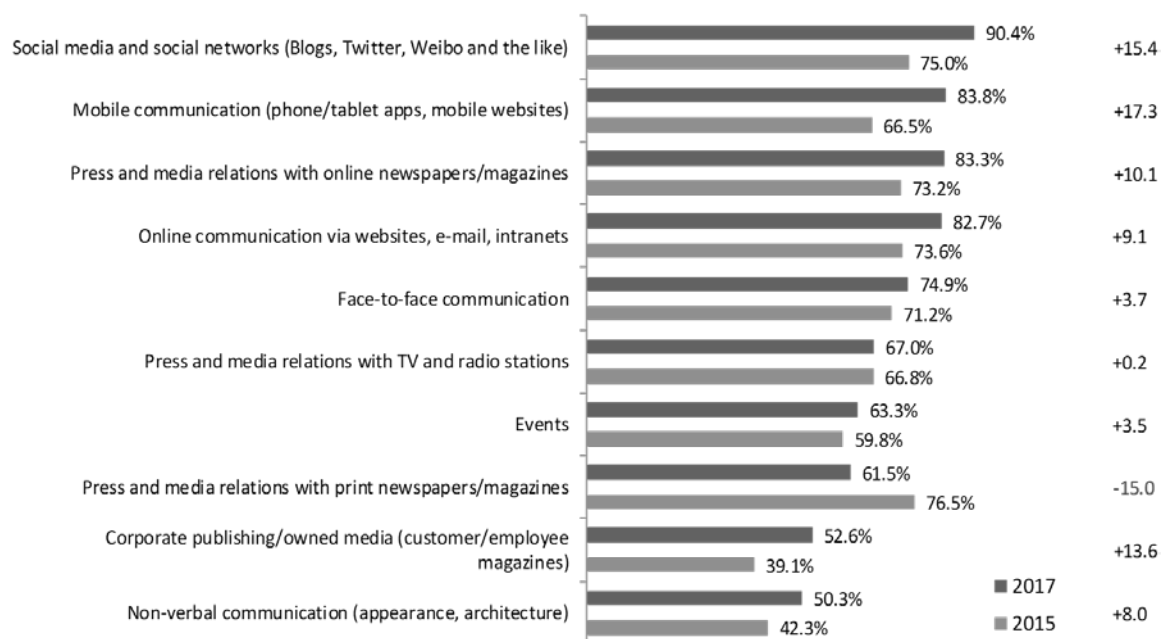
The second most important issue facing PR and communication practitioners in Asia-Pacific is ‘linking business strategy and communication’ (*RQ1*). This issue also has emerged as a key concern in European studies such as the 2017 ECM (Zerfass et al., 2017) (*RQ4*). The authors of the ECM have noted that communication activities are often not directly aligned to organization strategy and cannot show how they contribute to achieving the objectives of the organization. These and other authors call for greater alignment of PR and communication management with organization goals and objectives (Volk & Zerfass, 2018).

The issues perceived to be most important for practitioners in Asia-Pacific (‘coping with the digital evolution and the social web’; ‘linking business strategy and communication’; ‘dealing with the speed and volume of information flow’ and ‘using big data and/or algorithms for communication’) mirror the concerns of practitioners in Europe (Zerfass et al., 2017, pp. 52-57) and also in Latin America (Moreno et al., 2017, pp. 80-84). ‘Linking business strategy to communication’ is seen as an even bigger issue for attention in Europe. Latin-American practitioners, on the other hand, rate ‘linking business strategy to communication’ as less challenging, but they are more concerned with handling big data and automated communication than their peers in Asia and Europe (RQ4).

However, perhaps the most significant change reported in the APCM 2017/18 study compared with 2015/16 is that, for the first time, digital and social media have overtaken traditional media as the most important channels for communication (RQ2). The 2017/18 study found that more than 90 per cent of communication practitioners in Asia-Pacific see social media and social networks such as blogs, Facebook, Twitter, Weibo, and other similar platforms as important channels for communication with stakeholders and audiences. Their perceived importance has grown strongly since the previous survey in 2015/16 when 75 per cent of practitioners rated social media as important and when those channels were rated second behind traditional press and media relations with print newspapers or magazines (see Figure 2).

Also, the 2017/18 study found increasing focus on mobile communication, including applications for smart phones and tablets as well as mobile websites (RQ2). Mobile communication was also rated as more important than traditional media (press, TV and radio).

Figure 2. The most important channels of communication reported by practitioners in 2017/18 compared with 2015/16.

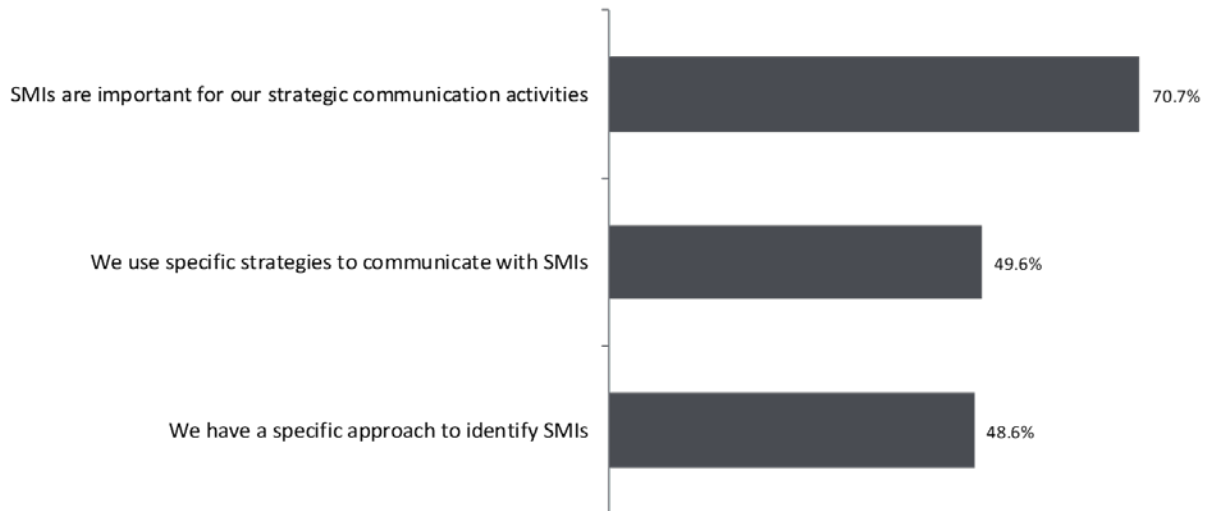


Source: Macnamara et al. (2017), n = 1,280 communication professionals and Macnamara et al. (2015), n = 1,148 communication professionals. Q 2/4: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.

Looking forward to 2020, Asia-Pacific practitioners foresee further growth in digital communication, including mobile, and a further decline in the importance of print newspapers and magazines and also a significant decline in the use of television (RQ3). In response to a question about the relative importance of media channels in three years time, 94 per cent of Asia-Pacific practitioners rated social media and social networks as the most important channels, compared with 78.7 per cent who rated print media as important and only 54.6 per cent who see TV as important by 2020. The shift to digital and social media and mobile is as pronounced in Asia-Pacific as it is in Europe (Zerfass et al., 2017, pp. 58-63) (RQ4). Practitioners in Latin America report an even steeper decline in the importance of print media and online newspapers and magazines as well as media relations with TV and radio in favour of social media and social networks (Moreno et al., 2017, pp. 85-91) (RQ4).

A new trend emerging in 2017/18 is identification of the role and importance of *social media influencers* (SMIs), defined as people online who others follow and from whom they take advice in relation to buying products or services or making other decisions (Freberg, Graham, McGaughey, & Freberg, 2011; Lindsay, Kaykas-Wolff, & Mathwick, 2015; Khamis Ang, & Welling, 2017). Examples are professional and part-time bloggers, as well as community activists. Participants in the 2017/18 APCM study agreed that SMIs are identifiable by, in order of priority: (1) relevance of topics and issues covered; (2) how much their content is shared and forwarded by others; (3) personal reputation; (4) their network position, such as number of followers; and (5) the reputation of their affiliated organization if applicable. More than 70 per cent of communication practitioners in Asia-Pacific agree that social media influencers are important for their organizations' communication activities (RQ1). Engagement with SMIs is seen as very important in China, Taiwan, Thailand, Indonesia, Japan and India.

Figure 3. Perceived importance of social media influences compared with SMI strategy.



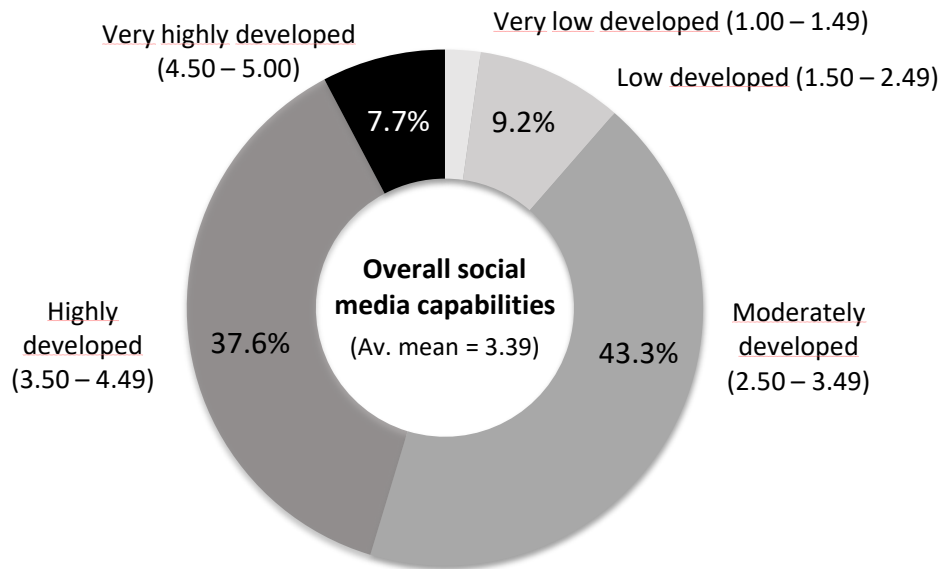
Source: Macnamara et al. (2017), n = 1,306 communication professionals from 22 countries. Q 3: Social media influencers (SMIs) “represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media.” Please rate the following statements, thinking of your organization/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4.5.

However, two concerning findings emerged from the 2017/18 study in relation to digital and social media. First, less than half of the participants reported that their organizations have an approach or strategies in place to engage with social media influencers. Second, given the stated importance of digital and social media, a particularly concerning finding is that only 7.7 per cent of communication practitioners in Asia-Pacific report having ‘very highly developed’ skills and capabilities in using these platforms (see Figure 4). Based on ratings of 11 skill dimensions, the social media capabilities of 37.6 per cent of practitioners were self-assessed as ‘highly developed’ but, despite some increases in skills and capabilities since 2015/16, 43.3 per cent reported having only ‘moderate’ capabilities and 11.4 per cent reported having ‘low’ or ‘very low’ capabilities in using these important channels (RQ1).

When it comes to particular skills and uses of digital and social media, practitioners in Asia-Pacific rated themselves highest for ‘delivering messages via social media’ (66.7 per cent), compared with ‘knowing about social media trends’ (60.6 per cent), ‘developing social media strategies’ (55.1 per cent), and only 39.0 per cent of practitioners rated ‘initiating web-based dialogues with stakeholders’ as a strength. Asia-Pacific practitioners reported an average social media competency rating of 3.18 on a five-point Likert scale – i.e., just above average.

Furthermore, the focus on ‘delivering messages via social media’ reflects a one-way information approach, contrary to two-way communication recommended in PR Excellence theory (Grunig et al., 2002, 2006), dialogic theory of PR and communication (Taylor & Kent, 2014), and interactive social media theory (Benkler, 2006; Curran, Fenton & Freedman, 2012; Kent, 2013; Macnamara, 2014).

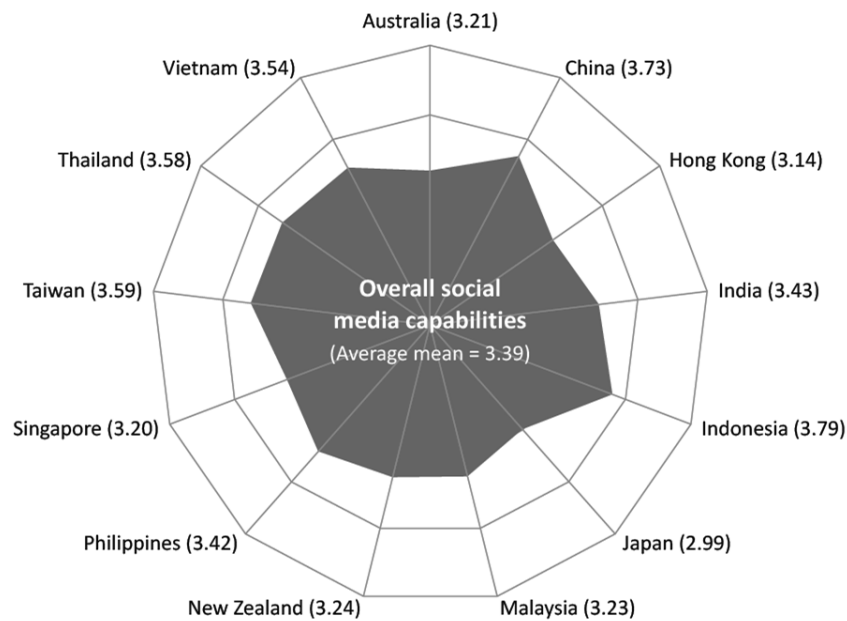
Figure 4. Level of skills and capabilities in using digital and social media reported by Asia-Pacific PR and communication practitioners.



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

Country by country comparison showed some significant differences in social media capabilities, with practitioners in Indonesia and China claiming the highest level of capability, while practitioners in Australia, Hong Kong, Singapore and particularly Japan were more modest and rated themselves below the mean of 3.39 on a five-point scale (see Figure 5). Country differences are likely to reflect cultural factors to some extent, noting that these ratings are self-assessments, and also sample sizes varied between countries, which means that country comparisons are indicative but not precise.

Figure 5. Country comparison of social media capabilities.



The shift to digital and social media, which includes websites, blogs, social media sites such as Facebook and RenRen pages, YouTube and Youku online video channels, and Weibo and Twitter accounts, as well as internal social platforms such as Yammer, Jive and SocialCast, indicates a challenge to the long-established PESO model of media use that represented the relative priority of paid, earned, shared and owned. Today, with the rise and rise of digital and social media and a decline in traditional advertising in relative terms, a new model of media use is emerging. Contemporary media strategy is increasingly SOPE (shared, owned, paid, earned), OSPE (owned, shared, paid, earned), or even SOEP (shared, owned, earned, paid).

In the 2015/16 APCM study, 56.3% of PR and communication practitioners forecast an increase in use of corporate digital publishing and owned media, with their perceived importance increasing from 39.1% who rate them as important in 2015 to 49.6% saying they will be important by 2018. This trend is forecast to continue to 2020, according to the latest 2017/18 APCM (RQ3).

Evaluation of communication was specifically addressed in the 2015/16 APCM, with practitioners reporting continuing difficulties in demonstrating the outcomes and impact of their work, particularly at an outcome and impact level. In Asia-Pacific as well as internationally, research shows a “stasis” in evaluation practices (Macnamara & Zerfass, 2017). Much evaluation remains focussed on measuring outputs such as the volume of media publicity, Web page visits, and social media likes and follows. While these demonstrate progress in reaching audiences and some level of engagement, they do not show changes in awareness, attitudes, or behaviour. Worldwide, evaluation is reported to be an area in which PR

and communication management needs to improve (Macnamara, 2018; Macnamara & Zerfass, 2017; Zerfass, Verčič, & Volk, 2017) (RQ4).

PR and communication practitioners in Asia-Pacific are confident in their skills and capabilities in management, particularly in relation to planning activities and managing relationships. However, only two-thirds rate themselves highly in managing human resources (i.e., people) and just over 60 per cent report having strong skills and capabilities in financial management. Practitioners in Australia, New Zealand, Hong Kong, India and Indonesia are particularly confident of their management capabilities. Notwithstanding, most practitioners stated that their management skills and capabilities need to be improved. Female practitioners expressed a stronger desire to strengthen their business and management knowledge than men.

CONCLUSIONS AND RECOMMENDATIONS

The Asia Pacific Communication Monitor, the largest survey of PR and communication practitioners in Asia-Pacific, shows that practice in the region is advanced and equal to world best practice in terms of adoption of digital and social media, with the importance of these channels now reported to be greater than traditional media and forecast to grow over the next three years.

However, practitioners report that their skills and capabilities in use of digital and social media has not kept pace with the growth in use and importance of these channels of communication. Also, they report a lack of availability of training and development to increase skills and capabilities in using these media. This presents a challenge and an opportunity for educators, professional industry associations, and training service providers in the region.

One manifestation of the lack of advanced skills and capabilities in digital and social media is that the two-way interactive affordances of online media, particularly social media and social networks, are not being fully utilized, such as for dialogue, engagement, and responding to stakeholders and publics. This indicates that organizations including corporations, government departments and agencies, non-government organizations, and non-profits are missing out on opportunities for engagement², which has been heralded as “a new paradigm for public relations in the 21st century” (Johnston, 2014, p. 381). Also, the one-way approach to social media use reveals a lack of listening, which has been identified as essential to gain insights into the views, concerns and interests of audiences, but which is often lacking in organization-public relations (OPR) and communication, according to research (Macnamara, 2016).

The challenge of linking PR and communication management to organizational goals and objectives continues to be a priority for practitioners in Asia-Pacific as well as globally. This finding is confirmed by studies of evaluation of PR and strategic communication, which reveal a lack of SMART (specific, measurable, achievable, relevant and time-bound) objectives in

many communication plans and campaigns in which 'relevant' refers to direct alignment to organizational objectives (Holtzhausen & Zerfass, 2015; Macnamara, 2018).

These findings inform planning by educators in terms of course design and delivery, as well as by professional industry bodies in terms of their professional development programs and practitioners in terms of planning their careers. The findings are commended to educators in the region as they plan and develop undergraduate and graduate courses. Also, the findings lead to a recommendation that industry associations and institutes should meet the need for increased skills and capabilities in digital and social media and some areas of management by offering short courses for graduates already in the workforce. Commercial service providers in the conference organizing and training and development field also can play a role and take advantage of an opportunity to develop customized courses, workshops and seminars as well as conferences focussed on addressing identified gaps and building strengths in priority areas of practice.

FURTHER RESEARCH

A continuation of the biannual Asia-Pacific Communication Monitor will provide data on progress in meeting challenges, such as the development of skills and capabilities in digital and social media and evaluation, as well as identifying emerging issues. The support of sponsors of the study and the universities and professional bodies in the region is therefore gratefully acknowledged as follows.

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¹ Despite being developed in the late 1990s and early 2000s, PR Excellence theory continues to be cited as a “dominant paradigm” in public relations theory (L’Etang, 2008; Pieczka, 2006, pp. 349-50).

² ‘Public relations and engagement’ was also the focus of a special issue of *Journal of Public Relations Research* in 2014 (Vol. 26, No. 5).