



International Association
of Business Communicators
Asia/Pacific Region

Comms Agenda 2021

Giving voice to communication professionals across APAC: what lies ahead for the profession?

About

In June 2020, Isentia and IABC APAC surveyed communication professionals across more than 21 industries and 14 countries to conduct **an in-depth and balanced research on the future of the communication profession post-pandemic**. The research aims to shed some light on the challenges and opportunities for the profession across APAC and uncover insights into what will be front and centre on communicators' agendas in the next 12 months. The even spread of responses across markets shows:

- **More focus on strategy** will require a new balance between in-house and outsourcing for communication teams;
- **Balancing clarity and empathy** with the need to communicate to a diverse audience across multiple channels will be key;
- **Strengthening employer-employee relationship** will amplify the impact of culture and behaviour upon customers and reputation;
- **Professional communicators will continue to focus on using data** to better position themselves, and to better inform strategies.

Countries: Australia (30%), China (4%), Hong Kong SAR (3%), India (19%), Indonesia (6%), Japan (2%), Malaysia (8%), New Zealand (11%), Pakistan (2%), Philippines (5%), Singapore (5%), Taiwan (1%), Thailand (3%), Vietnam (1%).

Top industries:

Marketing & Communications (19%)
Government (13%)
Healthcare & Lifesciences (9%)
Financial Services (8%)
Professional Services (7%)
Technology (6%)
Telecommunications & Media (5%)
Transport & Logistics (4%)
Other (29%)

Strategy & Evaluation

Strategy

Priorities

Metrics

Impact of technology

Media mix

Resources

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Teams

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Communications will become the cross-functional glue between Customer Experience, Marketing and Strategy

A message from Isentia

We are so excited to present these findings to the communications profession at this point in time, when the value of good, authentic communication has never been clearer. We developed this report with balance and comprehensiveness in mind and we wanted to give voice to the most diverse pool of communications professionals across APAC.

We know that good communications is an artform, and one that can be misunderstood and undervalued. What is heartening to see in this report is the desire to always be better, to do great work and to create stronger connections with both internal and external audiences. What we can also see is that it isn't always clear which path is the right one towards the future, and what development, technology and focus will lead to future success.

Building a bank of knowledge of good strategies, tools and ideas is crucial to ensuring that communicators can capitalise on their work and to continue to build and grow understanding and audience connection.

At Isentia we are committed to producing research that helps move communications forward. We hope that this information offers you insight into your profession and inspiration for you and your teams.



Ngaire Crawford

Insights Director, ANZ
Isentia



Prashant Saxena

Insights Director, Asia,
Isentia

A message from IABC APAC

As we find ourselves at the mid-way point of the year, we are pleased to be able to partner with Isentia to produce the Comms Agenda 2021. This study was undertaken to better understand how communication professionals in the region see their careers, departments, and organizations shifting to adapt to the new norm.

The research has revealed what we have always known as a profession – that there is unparalleled value to be found in having a strategic communicator at the heart of every organization.

COVID-19 has crystallized that embracing professional communicators as trusted advisors, has been critical to the success of any effective response. As one survey respondent put it, “we have the boardroom’s attention”. The journey continues and whichever phase each market may be in – from initial containment to the strategic, phased transition of living and working with COVID-19, to recovery – nimble and resilient communication, that is responsive to its environment, is vital. This, along with professional communicators who can work with incomplete information in a dynamic context, are key to supporting an organization's goals and strategy.

As we look to the next 12 months and what may be in store, being at the forefront of the industry and keenly aware of evolving trends are two of the areas in which we need to remain vigilant. In order to retain the attention of leaders and stakeholders, we need to continue scanning for gaps and opportunities, nurture a growth mindset with a focus on learning and developing, keep ourselves open to cross-functional collaboration, and be unafraid to step beyond our comfort zone.

We hope that you find this report useful. With Isentia having already worked with the IABC community at the chapter level in Canberra and Wellington, partnering with them on this was a natural progression. We look forward to delivering excellent value together through insight and advancing our profession across Asia Pacific.



Zora Artis

Immediate Past Chair
IABC Asia Pacific



Kristy Christie

Chair
IABC Asia Pacific

Strategy and Evaluation

Strategy

Priorities

Metrics

Impact of technology

Media mix

*"The mandate that will, and needs to, grow most is the mandate to bring diverse views, challenging questions, and even dissenting opinions back into organizational discussions and strategy such that innovative responses can be found. I think the responsibility of creating noise and fighting for share of voice just for the sake of it will and should disappear. **Content is not king, if ever it was. Tone (with an emphasis on care and empathy) is paramount.**"*



Craig Dowling

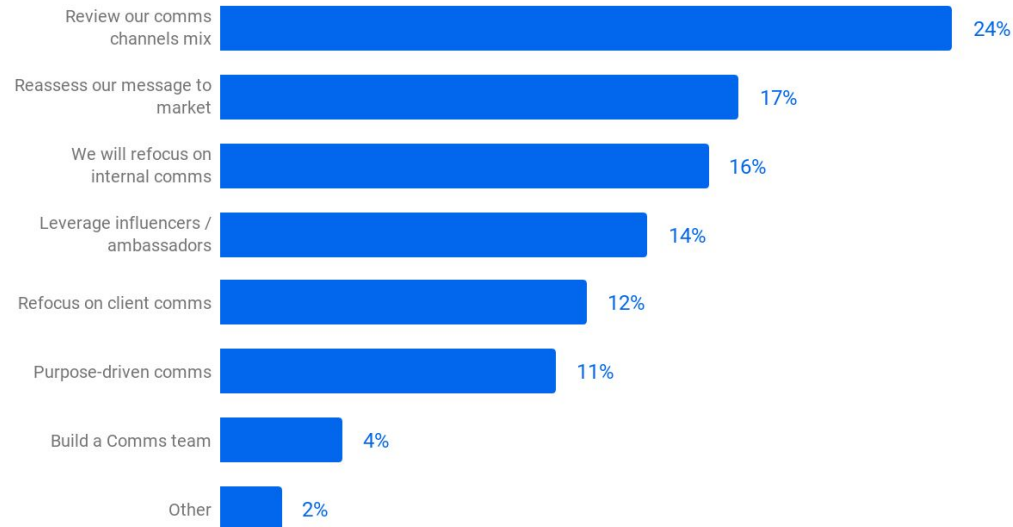
Head of Communications
Mercury NZ

Balancing internal and external communications while communicating with clarity and empathy to diverse audiences

The new normal will require communication teams to rethink their approach to strategy. New priorities such as employee engagement, and brand reputation will urge 24% of communication professionals to review their communication channels and focus their efforts on owned media while 17% will rethink their message to market approach.

Professional communicators will leverage internal comms to make employees and company culture a brand asset. Due to increasing transparency and connectivity, anyone can find out anything about how an organisation operates. Which means that one's internal culture can no longer be immune to scandal or concealed from the world. The next 12 months will see the convergence of internal and external communications and the need for collaboration across functions. Out of COVID-19 the challenge and opportunity for communication professionals will be to tell stories of flexibility, generosity and resilience within the organisation and within the community through an empathetic and clear message.

What aspects of your communication strategy will change as a result of COVID-19 in the next 12 months?



“COVID-19 has shown us that empathy is vital in a crisis. As communications professionals, we'll need to balance the need to display empathy as an organisation, with the need to announce difficult (and unpopular) business critical decisions.”



Mike Shaw

Associate Director Communications
Massey University, NZ

Priorities

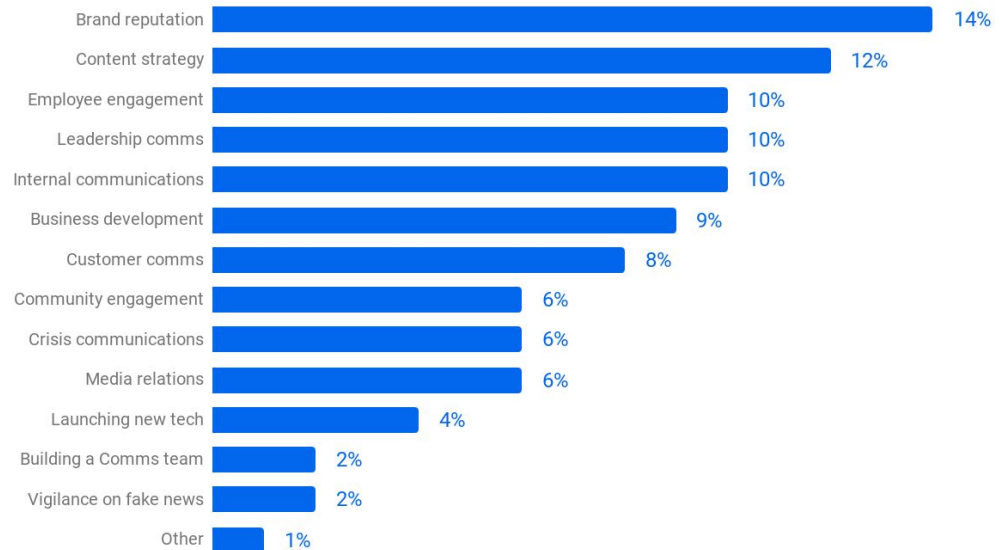
Brand reputation will top the list, underpinned by a balance of employee engagement, leadership communications and content strategy

As stated by one of the interviewed respondents, “Companies who consistently communicate and engage their stakeholders during the pandemic would have raised their NPS.” Communicators’ top priorities for the next 12 months reflect the need to create a consistent brand presence that can stand the test of time and crisis.

Reputation is the leading focus for professional communicators (14%), with most other areas of focus having a clear link to ensuring that reputation is enhanced or maintained. Communication professionals will realign lower budgets across the most important activities and leverage technology to remain at the forefront of employee engagement and customer relations.

Content strategy will also be prioritised (12%) as a way to maintain a consistent message, establish thought leadership and build brand reputation. The same “brand reputation focused” communication professionals will rely on leadership communications (10%) to effectively solidify their message strategy both internally and externally.

What will be your top communication priorities for the next 12 months?



*“Companies who consistently communicate and engage their customers and stakeholders during the pandemic would have raised their NPS. **In the next 12 months the role of communications will be even more critical** as companies and CEOs navigate the new normal and find new ways of increasing their market share.”*

Seok Kheng Toh

Head of Communications
Measat Broadcast Network Systems

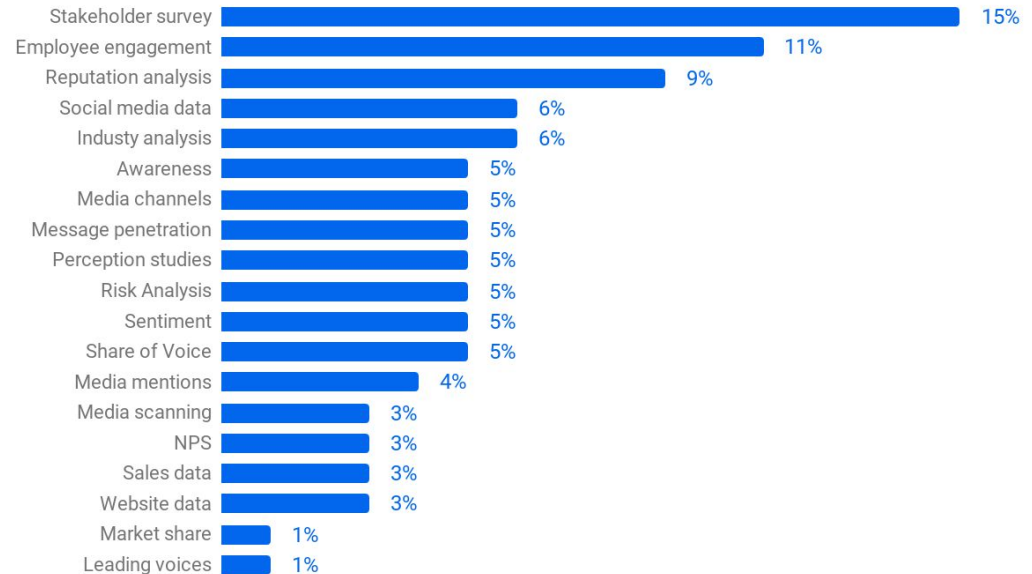
Stakeholder surveys, employee engagement and reputation data will be the “north star” metrics for communication professionals

With strategic responsibilities falling into the communications mandate and a bigger focus on ROI, communication teams will rely on a holistic view of the key reporting dimensions of stakeholder surveys (15%), employee engagement (11%) and reputation analysis (9%) to find actionable insights.

Surveys are often overlooked as research methodology due to the labour-intensive nature. However, communication teams will rely on survey metrics as the main data point to inform their strategy over the next 12 months. A new, reinvented approach to researching stakeholder sentiment (and in particular employee engagement) faster and in conjunction with other metrics, will provide vital data to assess the effectiveness of new message and channel strategies.

Reputation analysis will also be one of the key metrics as communication teams look to link internal and external communication strategies to positive brand impact and ROI.

How will you measure your effectiveness over the next 12 months?



*“Having proven our ability to communicate effectively with multiple audiences, leaders will come to us with more complex problems.
Expect to see professional communicators taking a higher stake in customer engagement, business growth and advising on strategy and innovation.”*



Damien Batey

Director of Communications
Motorola Solutions

Strengthening employer-employee relationship will amplify the impact of culture and behaviour on customer experience and reputation

Communication professionals will leverage technology to make a bigger impact on the lifeblood of their organisations over the next 12 months: Employees (15%) and Customers (13%).

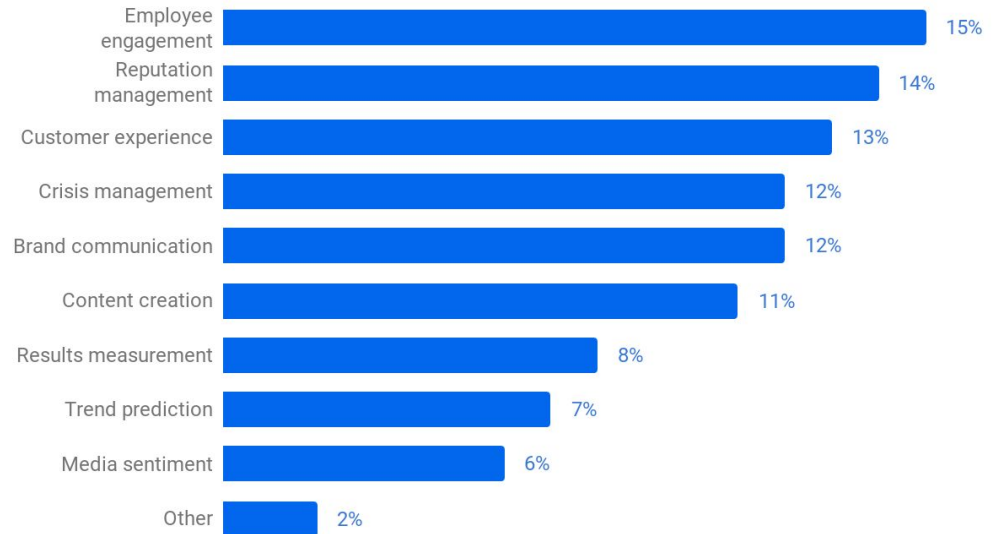
The employer-employee relationship is more important than ever and will be the leverage for creating a stronger impact of culture and brand behaviour upon customers and reputation.

Reputation management (14%) as it relates to employees and customers will also be a primary focus in a time of uncertainty.

Communication teams also demand more tech and automation to fine tune their brand communications (12%) and crisis management (12%) efforts.

Once again, understanding internal and external audiences will be important as well as communicating with simplicity, empathy and purpose.

Which areas of communications would you most like to advance through the use of new technology and tools, over the next 12 months?



*"Communications has been instrumental in breaking down hierarchy and silos while we're working remotely. It is deemed critical in our organisation, with an overarching 'communications framework' under development to improve communications across the business and in everything we do. This is largely being driven by a customer experience lens and includes how we speak to our customers, what we say to them in writing (emails and letters) and the relationship we have with our members too. **There is greater emphasis on the importance of good communications being everyone's responsibility, not just the communications team.**"*



Sonia Cahill

Manager, Communications and Engagement
Energy and Water Ombudsman Queensland

The rise of Glass Box Brands

According to TrendWatching, rise of the Glass Box Brand has been happening for the past decade, but with the rise of connectivity and radical transparency it is now a mega trend.

The implication is that anyone can find out what is going on in an organization. They can see the people, the values, the process, and what people within the box feel about what is going on. Think about all the touch points of the brand, inside and out, the experiences that are had, and the impact of these on brand perceptions.

Now that brands, and in turn organizations are a glass box, the brand is everything that is visible. The culture and brand, and in essence internal and external communications are intertwined. Internal issues are becoming public with employee activism.

Now that brands, and in turn organizations are a glass box, the brand is everything that is visible.

More and more we see internal communications are made public - the leaders who are good communicators understand the power of communication done well. We've seen this with [employee layoff comms by Brian Chesky at Airbnb](#) and [Anthony Tan at Grab](#), or the New Ways of Working podcast on iTunes from Shayne Elliott at ANZ Bank - [Learn more about the ANZ Way Podcast Series](#).

RECOMMENDED READ - [Airbnb was like a family, until the layoffs started](#)

Media mix

Capitalising on owned media channels will enable communication professionals to reach their audience while controlling the narrative

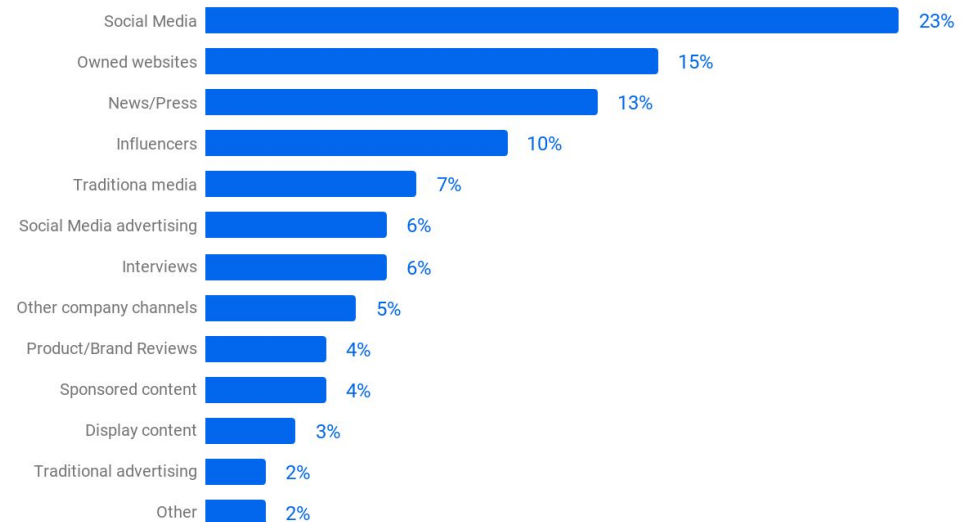
As professional communicators refocus on strategy and look to do so on tighter budgets, they will rely on owned media channels as critical to their media mix. 23% of communication professional will use social media, with a mix of in-house and outsourced expertise, as the primary media type to reach various stakeholders while 15% will leverage owned websites.

While social media data will be the 4th most important metric in the next 12 months, communication professionals will be able to use a combination of dimensions to make sense of the activities across owned channels; reputation analysis, employee engagement, stakeholder surveys, brand awareness and perception studies will all contribute to the winning reporting formula to track the media mix performance.

"The current environment is demanding communication professionals to think outside the square to engage teams differently while balancing overloading them with 'too much' information."

Sonia Cahill, Manager, Communications and Engagement
Energy and Water Ombudsman Queensland

What media types will become critical to the success of your communication strategy in the next 12 months?



*“Examples good and bad from around the globe during the COVID-19 crisis have highlighted **the importance of consistent, clear, credible and trustworthy communication**. In times of crisis, people don't want to be overwhelmed, misled or any more confused than they already are. Communication professionals should already have a seat at the top table within their organisations, and I think the examples seen during COVID-19 will reinforce why this is important.”*



Kathryn Britt

Director
Cicero Communications

Resources

Budget

Teams

Outsourcing

Agency collaboration

Organisational synergies

“Communications that deliver value to audiences by providing practical advice and resources, and most importantly, are underpinned by data, will be standard.”



Elisha Sutherland
Senior Communication Leader
QSuper

When less is more, evaluation and transparency become pivotal for a successful communication strategy

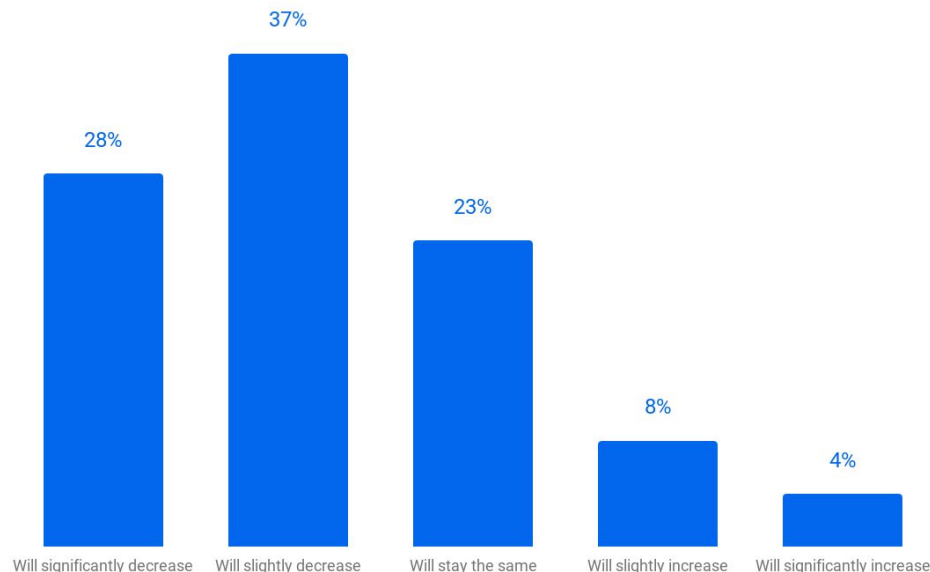
COVID-19 has forced many organisations across virtually every sector to review their spend and budget forecast. **Now more than ever, communication is seen as vitally important** for the successful delivery of the strategy but although over the next 12 months more responsibilities will fall in the realm of communication professionals, these will also need to **achieve more with less**.

65%

Of communication professionals expect their budget will decrease in the next 12 months.

Balancing internal and external communications with the need to connect with diverse audiences across different channels will require a smart use of data. **Clarity and empathy will also be key to reaching those audiences with purpose and on a large scale**. The pressure is on to do more with less and always show the impact of communications through proper evaluation and a clear link to wider organisational objectives.

Do you expect your team/department budget will be affected by COVID-19 in the next 12 months?



*“New responsibilities will include adopting new technologies and virtual platforms as means to communicate. **Being empathetic and transparent when communicating and handling crisis management will become the mandate.**”*



Vijaya Singh

AGM, Marketing and Communications
Embassy Group

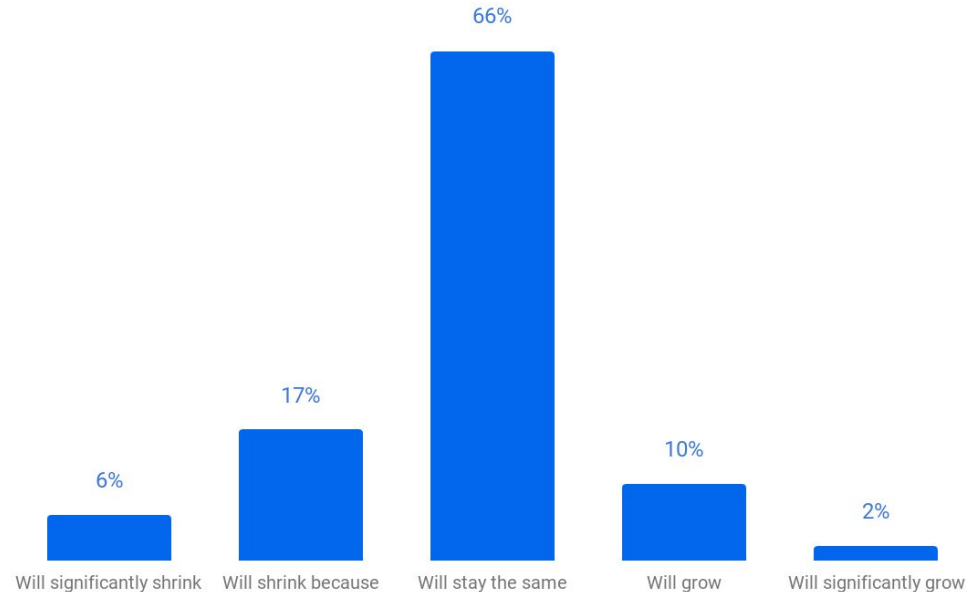
Communication teams have “the boardroom attention” and will leverage data to enable strategy, engagement and scale

The majority of organisations won't reduce the size of their communications teams (66%). These are still considered vital to success as reliance on external agencies diminishes. The communication profession has gained even more value to the eyes of organisations, through the COVID-19 pandemic, to the point where communication teams will have “the boardroom's attention” in 2021. But the need remain for comms teams to become more agile and join the rest of the business in the quest for digital transformation as an enabler for strategy, implementation and engagement.

“COVID-19 was the moment for professional communicators to demonstrate their worth. Now that we have the boardroom's attention, we need to lead the way on the future of communications.”

Damien Batey, Director of Communications
Motorola Solutions

How will COVID-19 impact the size of your communication team/department in the next 12 months?



*"If, as anticipated, a sizable of our workforce remains remote we will need to reimagine our internal communications programme but that is likely to be more of a big do, than a big spend. **We will leverage technologies even more so than we do today. A bigger change is likely to be in how we engage with clients and the change in customer behaviour.** I predict a more significant shift in marketing communications. For organisations where 'events' have been a significant part of their marketing mix, a rethink will be essential."*



Danielle Bond

Group Director, Brand Marketing & Communications
Aurecon

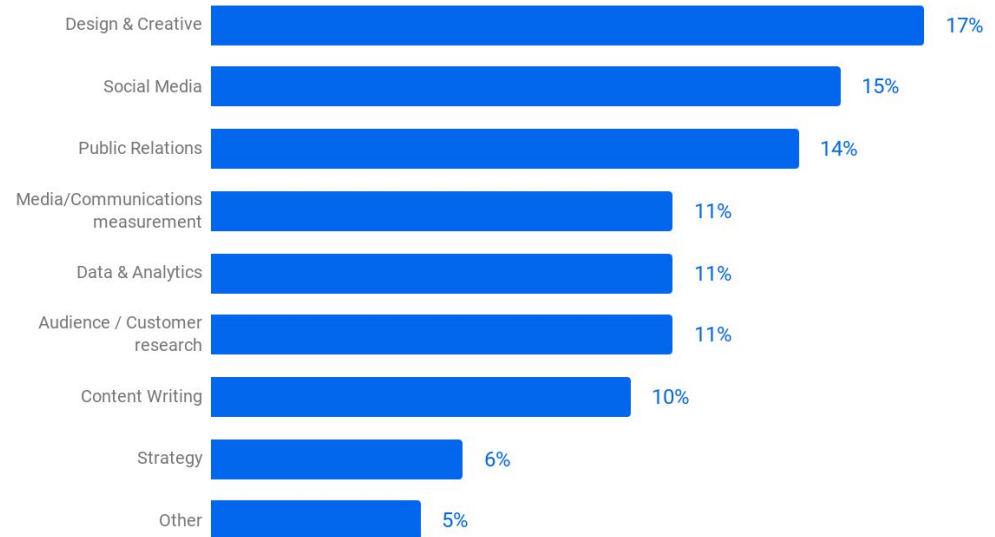
Increasing focus on strategy means communication professionals may outsource hands-on functions

The next 12 months will see communication professionals in the driver seat at a strategy level, demonstrating ROI and business outcomes. This will mainly be driven by a new balance between internal resources and external PR/communication agencies but some level of outsourcing will still be required.

Communication teams will outsource hands-on function, such as Social Media (15%) and Design & Creative (17%) to focus on higher value, strategy work. Although reliance on external PR and communication agencies will diminish, 14% of communication professionals will still outsource some aspects of their Public Relations.

Currently, Audience Research (11%), Data Analytics (11%) and Media Measurement (11%) are not deemed to be the most important outsourcing areas. However, with the focus on strategy and ROI increasing, professional communicators will have the opportunity to enable more informed decisions by outsourcing key data, measurement and insights tasks.

What types of outsourcing are you more likely to embrace in the next 12 months as a result of COVID19?



*“COVID-19 caused CEOs to see the holistic value their communications teams bring to manage complex issues, engage diverse stakeholder groups, maintain staff engagement and protect corporate reputation. Now that we have their attention, **we are obliged to bring the future vision for communications to life.**”*



Damien Batey

Director of Communications
Motorola Solutions

Agency collaboration

The “new normal” will require communication professionals to find more balance between internal resources and agencies

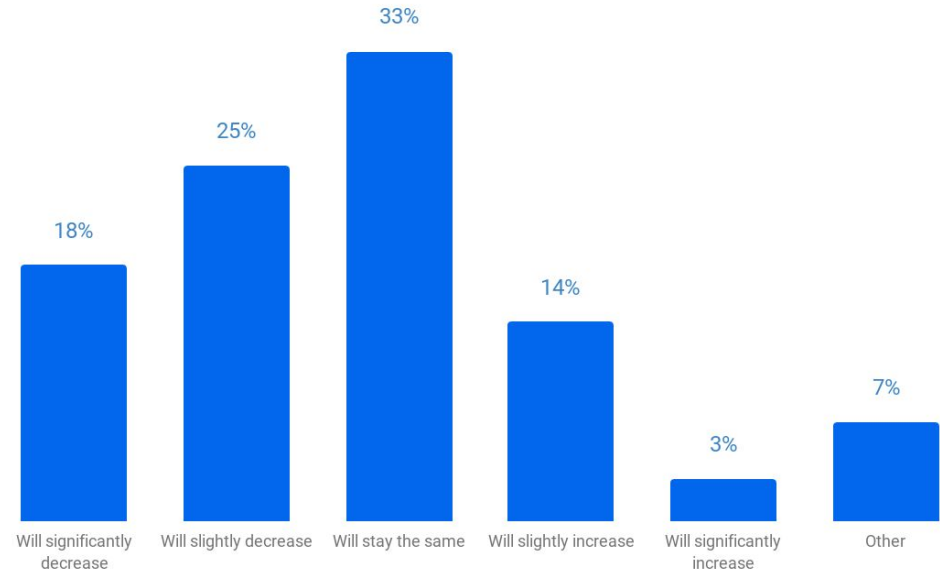
Budgetary pressure will push 43% of communication departments to review their relationship with external agencies/consultants and increase their reliance on internal resources to implement the strategy.

In-house teams will need to ensure that they have the right competencies and tools but also seize the opportunity to upskill their talents over the next 12 months. Whilst agencies and consultants have the opportunity to rethink what services and delivery model will suit the economic environment.

“There will be more dependence on Internal resources than external agencies due to budget constraints. That does not mean external support will not be required but internal resources too will have to upskill themselves. Communication professionals will have to incessantly seek out new skills and opportunities to add value to the business. Pandemic is a crucial time where we need to look inward at our organization and audit the talent.”

Namita Narula Gandhi, GM of Corporate Communications
Cloudnine Group of Hospitals

Will your team/department collaboration with external agencies be affected by COVID-19 in the next 12 months?



Synergies

Communications will become the cross-functional glue between Customer Experience, Marketing and Strategy

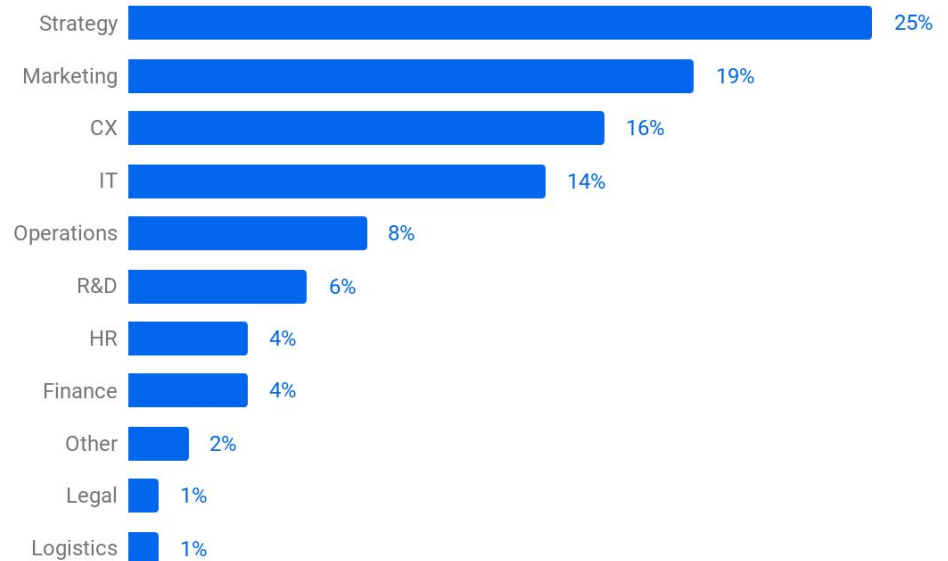
Communication professionals will be at the epicentre of organisational strategy over the next 12 months, working closely with leadership teams to achieve business objectives and enable sustainable growth. They will also foster collaborative relationships with Marketing (19%) and Customer Experience (16%) to drive outcomes across all stages of the customer lifecycle.

Strategy will be a key focus for communication professionals looking to make a company-wide impact by improving employee engagement, reputation management, customer experience, digital transformation, community engagement and crisis resolution while an increasing symbiosis with IT departments will see them take the front seat in the digital transformation journey.

"Communications professional will have greater strategic role and will be part of the revenue centre."

Arun Arora, Director of Strategy and Communications
Mavyn

Which organisational departments will communication professionals work more closely with in the next 12 months as a result of COVID-19?



“The imperative of 'connecting the dots' across how companies face the market and engage internal and external stakeholders has always been important but is even more so as people look for leadership and consistency in how leaders and businesses say, do and act.”



Danielle Bond

Group Director, Brand Marketing & Communications
Aurecon

About Isentia

Isentia (ASX:ISD) is APAC's leading integrated Media Intelligence and Insights business. Isentia blends market-leading monitoring experience with analytics to help the world's biggest brands uncover the whole picture – and act on it.

Powered by cutting-edge technology and a team of world class experts, our mission is to help businesses leap-forward where only genuine insight can take them.

To find out more about how we inform better decisions, please visit www.isentia.com.

About IABC Asia Pacific

The International Association of Business Communicators (IABC) is the only global professional communication association that connects you with the people and insights you need to drive business results, and address challenges and opportunities. Our purpose is to advance the profession, create connection and develop strategic communication professionals. In the Asia Pacific region IABC has thirteen chapters and members-at-large in Australia, New Zealand, India, Indonesia, Japan, Malaysia, Hong Kong SAR, the Philippines, Singapore, Vietnam, Pakistan, China, Fiji and Thailand.

To find out more about our services, resources and memberships, please visit iabcapac.com



International Association
of Business Communicators
Asia/Pacific Region