

Aspectus

Marcom in Asia

Optimism and opportunities



# Introduction: A confident continent

The marcoms industry in Asia is facing the future with confidence.

That's the clear message from the PR, marketing, communications and branding professionals who took part in our recent survey. Across generations and in businesses of various sizes, all but a tiny few are optimistic about the marcom industry's prospects for growth in the next 12 months.

A significant majority (78%) are positive about their own ability to capture and grow opportunities for their company and their clients. And although there are plenty who feel that their own practice is still developing (43%), even greater numbers believe that the marcom industry is both established and thriving (48%). It's a sector on the up, building on its successes and looking for new opportunities.

This aligns with what we're hearing from our growing client base in the region. As we continue to expand our on-the-ground presence in Singapore, this kind of confidence and positivity is exactly what we want to hear.

**Koh Juat Muay**, President, Institute of Public Relations of Singapore feels the buoyant nature of the industry is a positive barometer for growth, she comments:

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This is a timely survey to bring the value and awareness of marketing communications to the forefront in a fast-evolving technological revolution. The confidence and optimism among respondents are crucial to encourage support and secure investments for marcom activities.

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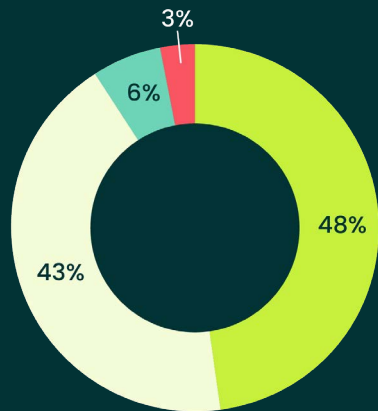


Confidence is key, but it is important to dig into what is driving this and what trends emerge from this optimism.

At Aspectus, we get results when we understand exactly what our customers are thinking and how they see their own businesses now – and in the future. When we get to grips with the challenges they face in the future, the transformations they are experiencing now, and the results they have already achieved, we get better results for them.

### Company marcom practices are mostly flourishing

Question: in general, how would you describe your company's current marketing communications practices in Asia?



- Established & thriving
- Limited or ad-hoc
- Still developing
- Near zero, needs work

So that is what we have done. This report presents the results of our research, looking at both the tactical issues that Asia's marcom industry is facing – from skills to budgets – as well as the more strategic demands for proving value and demonstrating the all-important return on investment, and the necessity of having expertise on the ground, where it matters.

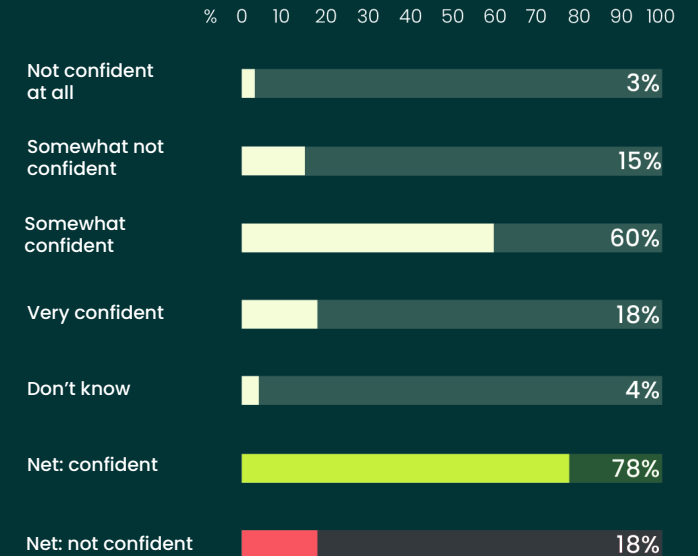
### High levels of confidence in business opportunities

Question: how confident are you in the ability of marcom to grow/capture opportunities for you/your clients in the region over the next 12 months?



### High levels of confidence in marcom growth potential

Question: overall, how confident are you in the ability of the marcom industry to grow and prosper over the next 12 months?



# Digital First

The shape of marcom in Asia certainly reflects broader global trends in our industry. The majority of marketing professionals who took part in our survey have at least some responsibility for digital marketing – and 95% of the 18-24 age group who took part is a digital marketer in some form.

There's also a fairly even spread of professional marketers working in content creation, branding and identity, and social media and paid campaigns. About one in ten currently sees themselves as AI specialists – a number that will almost certainly increase over the next few years. They too are more likely to be from the younger age groups.

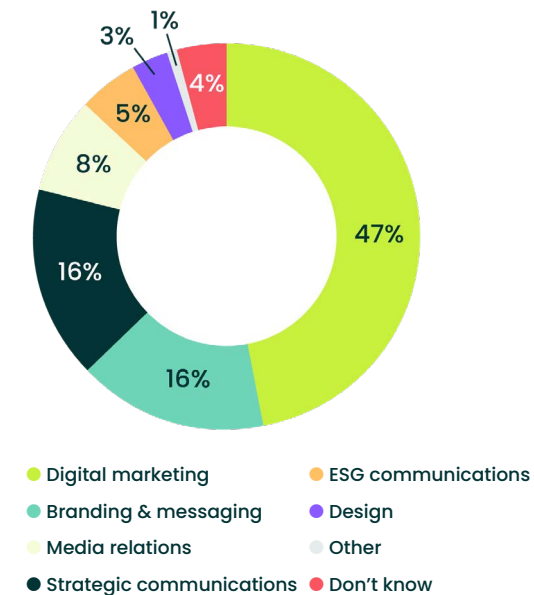
In contrast, Gen X and elder Millennials are far more likely to be found in branding and identity or public relations. Older groups were also far more likely to say that public relations and building media relationships were primary areas of focus for their marcom activities.

Nearly half of all respondents (47%) view digital marketing as the biggest opportunity to capture market share. That's triple the number of respondents who voted for strategic communications (16%), or branding and messaging (16%), which tied in the

second spot. Interestingly when it comes to Generation Z respondents 83% view digital marketing as the single biggest way to obtain audience cut through.

## How to capture market share

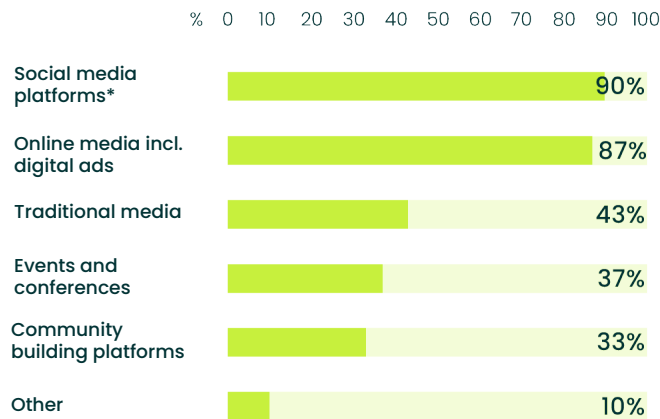
Question: which marcom activity presents the biggest opportunity to capture market share in your sector?



It comes as no surprise, therefore, that social media platforms, organic and paid posts top the list of priority communication channels for marcom activities over the next 12 months. They are very closely followed by online media including digital ads. Every member of Generation Z said these were a top-three priority; while none of them said that events and conferences were.

### Most important communication channels

Question: please indicate the priority channels for your marcom activities in 2023–2024: Top 3



\*organic and paid post



It’s reassuring to see that marcom professionals in Asia are skilled across different disciplines. In today’s world where marcom roles have become increasingly specialised, understanding and having the competence to operate campaigns in an omni-channel environment will elevate all generations of marketers.

Gwenne Chen

Head of Marketing  
Communications, AsiaNext



### What marcom professionals work on

Question: what area of marcoms do you work in? Please select all that apply.



\*& paid campaigns





# Changing roles and new skills

All of this presents some interesting challenges for the marcom industry in Asia, as well as suggesting potential areas for growth in the future.

We noted only a relatively small number of professionals are working in areas like customer data research, UX/UI, search engine optimisation (SEO) and search engine marketing (SEM). These more analytical, data-driven roles are critical elements of the digital marketing mix and play a vital role in delivering the strategic wins and returns on investment that every business is looking for. We'll be discussing this below, but these look like roles that can be expanded and an area for growth.

There is also some concern about the marketing skills mix. The rapid pace of change in technology and new media forms is seen by nearly half as one of the key challenges facing the overall marketing and communications industry in Asia right now. A similar number see the challenge of reaching and engaging target audiences across platforms as media consumption becomes increasingly fragmented in a similar light.

Nearly half also see the constant evolution of digital platforms and algorithms as one of the

most significant challenges faced by marketing professionals when delivering successful marcom activities. Interestingly, this is eight times higher among Generation Z respondents than Generation X – 65 percent compared to eight percent. It seems that those who are more familiar with digital technologies, and place greater emphasis on its role in marcom activity, are also more likely to see the inherent challenges involved.

Christopher See, Head of Marketing, SGX FX believes this awareness and drive to become more all-rounded is key to the future of those who work in the industry and will drive client and business success:



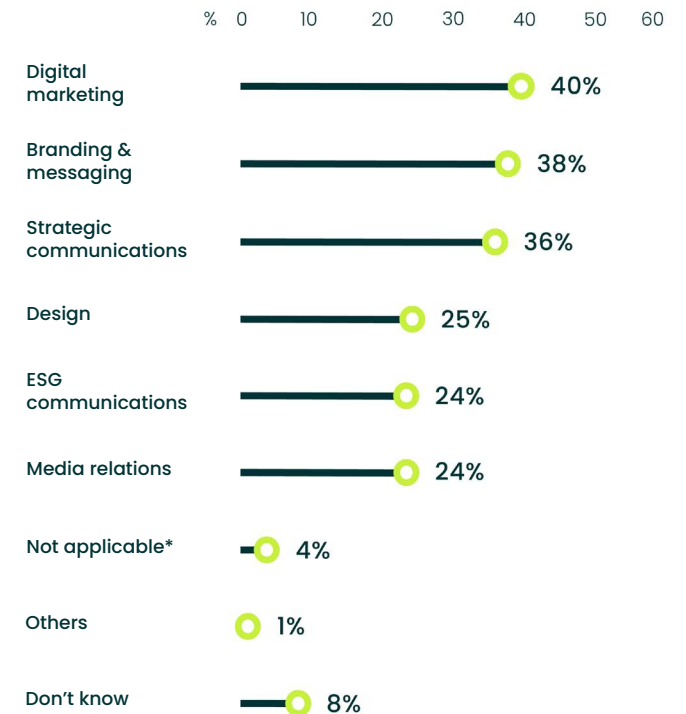
It is clear that having the knowledge and desire for campaigns to run across different digital platforms is now a must for marketing departments. But upskilling and understanding the mechanics of new types of marketing can be hard – regardless of the appetite to learn – given time constraints

and the amount of ground marketers need to cover. It is clear that a trusted partnership is key to help stand out from your competition, especially in a competitive market. Leaning on a partner – be it freelance or agency – not only enables broader horizons, but also ensures quick execution, based on their experience.



## Where more marketing skills are needed

Question: which of these marketing skills do you feel are lacking regarding talent in Asia? Please select all that apply



\*no shortage of skilled talent



# Matching skills with business growth

When 40 percent – including three quarters of Generation Z – say that digital marketing skills are lacking in Asia (despite digital marketing presenting the biggest opportunity for capturing market share) that's something to be addressed.

And when we dig even deeper into the numbers, they show that there is more to this mismatch between skills and business opportunity. For example: brand awareness is a top area of focus for marcom activities, and branding and messaging is the second biggest concern when it comes to marketing skills shortages, but only 16 percent see it as presenting the biggest opportunity to capture market share.

Or consider this: 36 percent say that public relations and building media relations are a primary area of focus for their company's marcom activity in Asia. But only eight percent feel that media relations present one of the biggest opportunities for capturing market share. As discussed below, this is a concern, since aligning activity and business goals is a necessary component of delivering value.

See adds that while marketing channels have expanded and evolved, public relations will continue to be an integral part of a brand's marcom mix.

// **Public Relations and earned media remain as powerful as it has ever been. However, it is now part of a wider marketing machine that is far more powerful when combined with other components. PR professionals are story tellers**

at heart – harnessing their creative ability and ensuring it is spread across other channels time and time again will really get a brand's message across and make it much stronger.

**Christopher See**  
Head of Marketing, SGX FX





# On the ground and in the know

Having access to the right skills at the right time is obviously important to our survey participants. But it's also clear that local knowledge and expertise is a key part of that skills mix.

**Koh**, a veteran of the industry who has seen many businesses look to get a marcom foothold in the region agrees.



A successful marcom team is one that embraces cultural diversity and understands the sensitivities around what works on the ground and respects these nuances in their marketing campaigns.

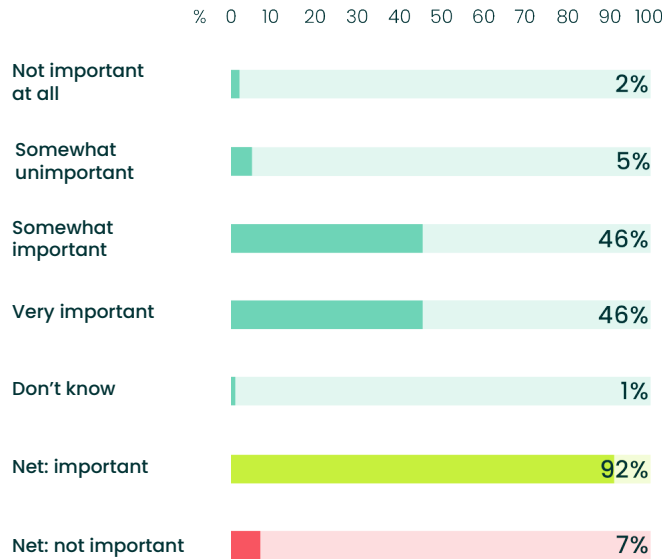


A resounding 92 percent of marketing professionals emphasise the importance of on-the-ground representation or expertise in Asian markets for marcom activities. Seven in ten feel that not understanding local market dynamics is a major obstacle to delivering successful marcom activities in Asia; more than half said that finding suitable local partners or agencies was a challenge, and a third said that communicating across cultures and languages in Asia is a challenge.

In other words, while access to global teams and pools of skills and knowledge can make a big difference, understanding local nuances in the business, market and regulatory landscape, alongside local support, and engagement at a local level make a big difference to successfully accomplishing business goals.

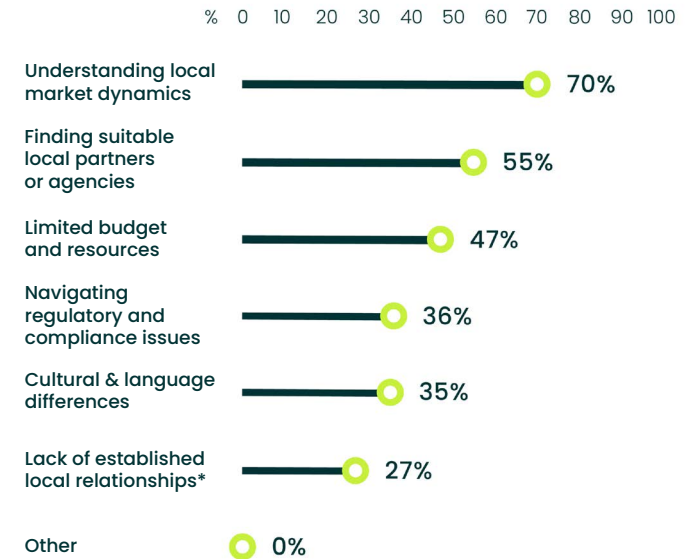
### Local expertise is non-negotiable

Question: how important do you consider having on-the-ground representation or expertise in Asian markets for your marcom



### Barriers to success

Question: in your opinion, what are the main obstacles or barriers to delivering successful marcom activities in Asia?



\*with media/ influencers or other stakeholders





# Balancing tactics and strategy

As noted above, there are some questions about what professionals feel their focus is – or should be – with what their company believes will help grow market share. In other words, is daily marcom activity really helping companies achieve their goals?

This is a strategic issue, which relates directly to the biggest challenges facing the marcom industry as a whole: demonstrating the return on investment (ROI) of marketing and communications campaigns, which 60 percent said was the biggest challenge they face today.

It's ironic. The opportunities that digital marketing presents, and that marcom professionals have identified and embraced, also offer vastly improved tools for measuring impact. It's possible to link campaigns, content and coverage to the quantity and quality of web traffic and customer engagement, for example.

When it comes to short- and medium-term activities, marketers can see what does – and crucially what doesn't – work and use that knowledge to inform future activity.

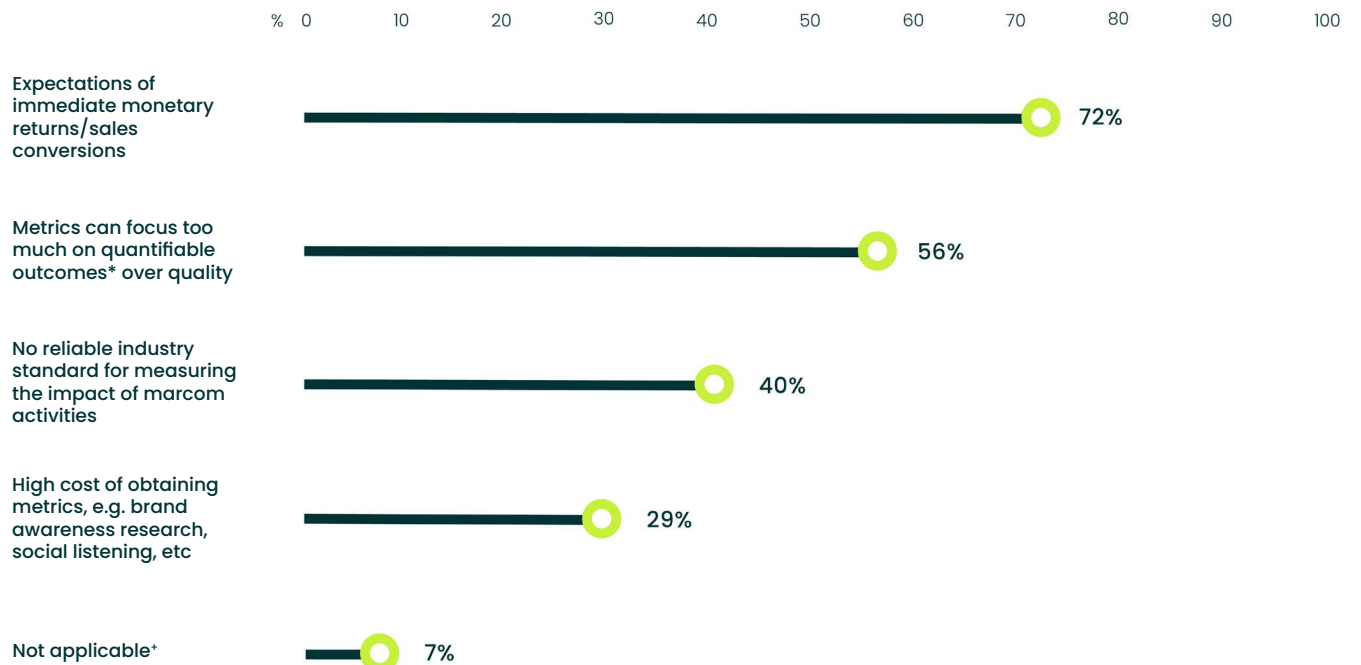
And yet, some of the biggest challenges that individual professionals face in their day-to-day work are budget constraints and unrealistic expectations of what can be achieved. And these are often rooted in a lack of understanding of marcom functions (although a lucky six percent told us that they do have all the budget they need.)

In fact, the two main barriers to accessing adequate resources are the undervaluation of what marcom teams do and, to come full circle, a lack of understanding of the ROI that marcom activities can achieve. Generation Z in particular feel that their roles are undervalued, which is not good news for the long term of the industry.

As a marcom practitioner working with businesses across APAC and beyond, Louise Veitch, Head of Southeast Asia, Aspectus Group, confirms the challenges marcom teams face in demonstrating ROI.

## Challenges in measuring impact/ROI

Question: what do you think are some of the challenges in measuring the impact/ROI of marcom campaigns?



\*e.g. media coverage, likes, impressions

\*I don't think there are any challenges to measuring the impact/ROI of marcom campaigns

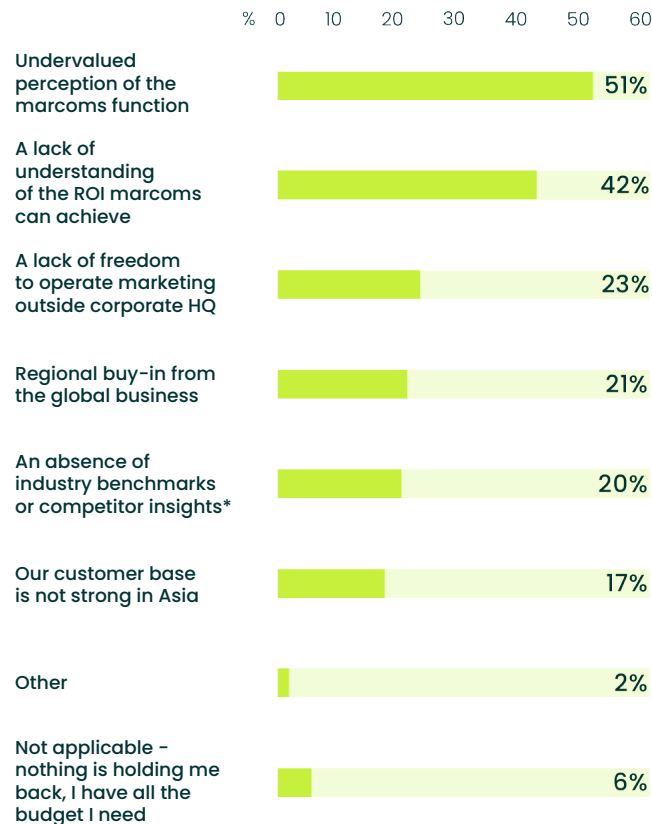
// Any marcom specialist will know that evidencing results that go towards the sales pipeline has never been more important – and more demanded – by key stakeholders. These results confirm this. What is still often overlooked is the ability an omnichannel campaign has to show exactly what has been achieved. Everyone knows that earned media or PR drives brand recognition and encourages sales conversations, but it’s often hard to evidence. By combining stories into wider digital marketing campaigns – you will have something far more tangible to show.

Louise Veitch  
Head of South East Asia



### Securing budget linked to delivering value

Question: what, if anything, is holding you back from accessing enough resources/budget to deliver successful marcom activities? Please select all that apply:



\*that could highlight the necessity of adequate marcom budget

// For B2B, marcom has the ability to show its increasing influence towards commercial success. It has to blend the art of purposeful storytelling with actionable data for omnichannel campaigns to drive quantifiable outcomes such as qualified sales leads.

Lucas How  
Marketing & Communications  
Manager, APAC Services,  
Sulzer Singapore



# Tangible results are more important than ever

The key message here is that if marketers cannot demonstrate value, they cannot hope to unlock budget.

This goes beyond people focusing on areas that may not be contributing to growth or boosting the bottom line. Most also face the expectation of immediate monetary returns. Digital tactics have given us the means to measure our work; many of our respondents say their challenge is that metrics are often focused on quantifiable outcomes rather than their quality.

As many of our respondents noted, it doesn't help that there are no industry standards for measuring the impact of marcom activities. But that doesn't hide the fact that there is a contradiction at the heart of the marcom industry. For example, 72 percent of our respondents say they need to meet demands for measurable financial impacts – suggesting

performance marketing or sales activation. At the same time, 73 percent say that one of their main focuses is raising brand awareness – by definition, a medium-to-long term activity delivering incremental returns.

This duality is a subject close to the hearts of our strategists at Aspectus. We know that most people want their work to be valued, and want their work to mean something. We also know that budget holders want their investments to mean something. And, as proven by our survey, we know that marketers want to build long-term brands, and need the skills, resources, and budget to help them do that.

Navigating all these demands is not easy, even with all the digital tools available. But we are committed to delivering real business value from our work: and the starting point for that is mixing the creative with the analytical. Benchmarking, measuring, and analysing results against targets. Directing efforts towards the activities that will achieve those targets. And taking both a long and short-term view. It's one of the reasons that we believe activities like customer data research, and the user experience, are going to increase.

Companies that invest in their brands outperform those that don't. Marcom professionals in Asia have that opportunity to do that for their companies. And our Asia team is on the ground to help them achieve it.

Visit us at > [www.aspectusgroup.com](http://www.aspectusgroup.com)

Contact our Head of Southeast Asia > [louise.veitch@aspectusgroup.com](mailto:louise.veitch@aspectusgroup.com)



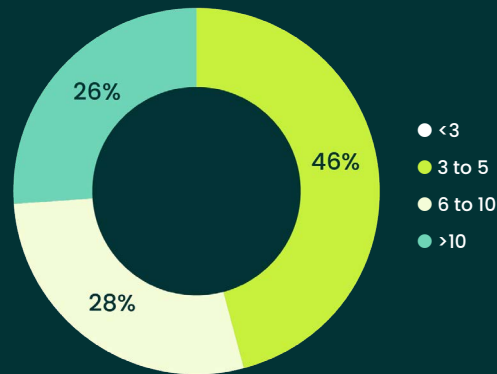
# Appendix I

## Our survey participants: the Asian marcom industry in numbers

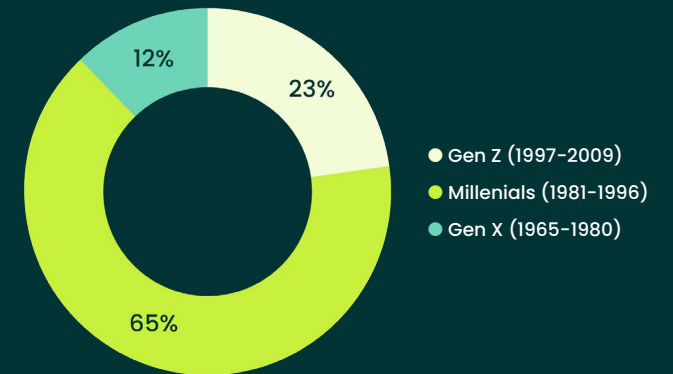
This is an industry where women flourish (83 percent of our respondents are female) and is dominated by millennials (those born between 1981 and 1996). In fact, 42 percent of our respondents are aged between 25 and 34; 30 percent are 35 to 44; and another 20 percent are aged 18 to 24.

All our correspondents are currently working full time, and all have been in this kind of role for more than three years. A quarter have ten or more years' experience under their belts. The significant majority (80 percent) work in-house, in teams of all sizes.

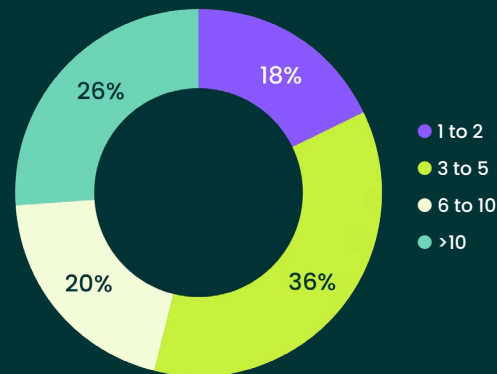
### Time working in marcom role (years)



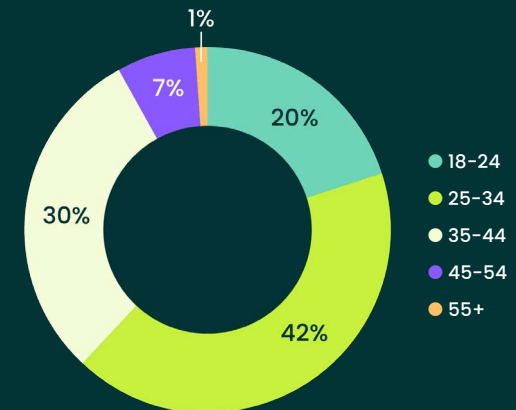
### Generation



### Size of in-house marcom team



### Age group



# Appendix II

## Social media habits

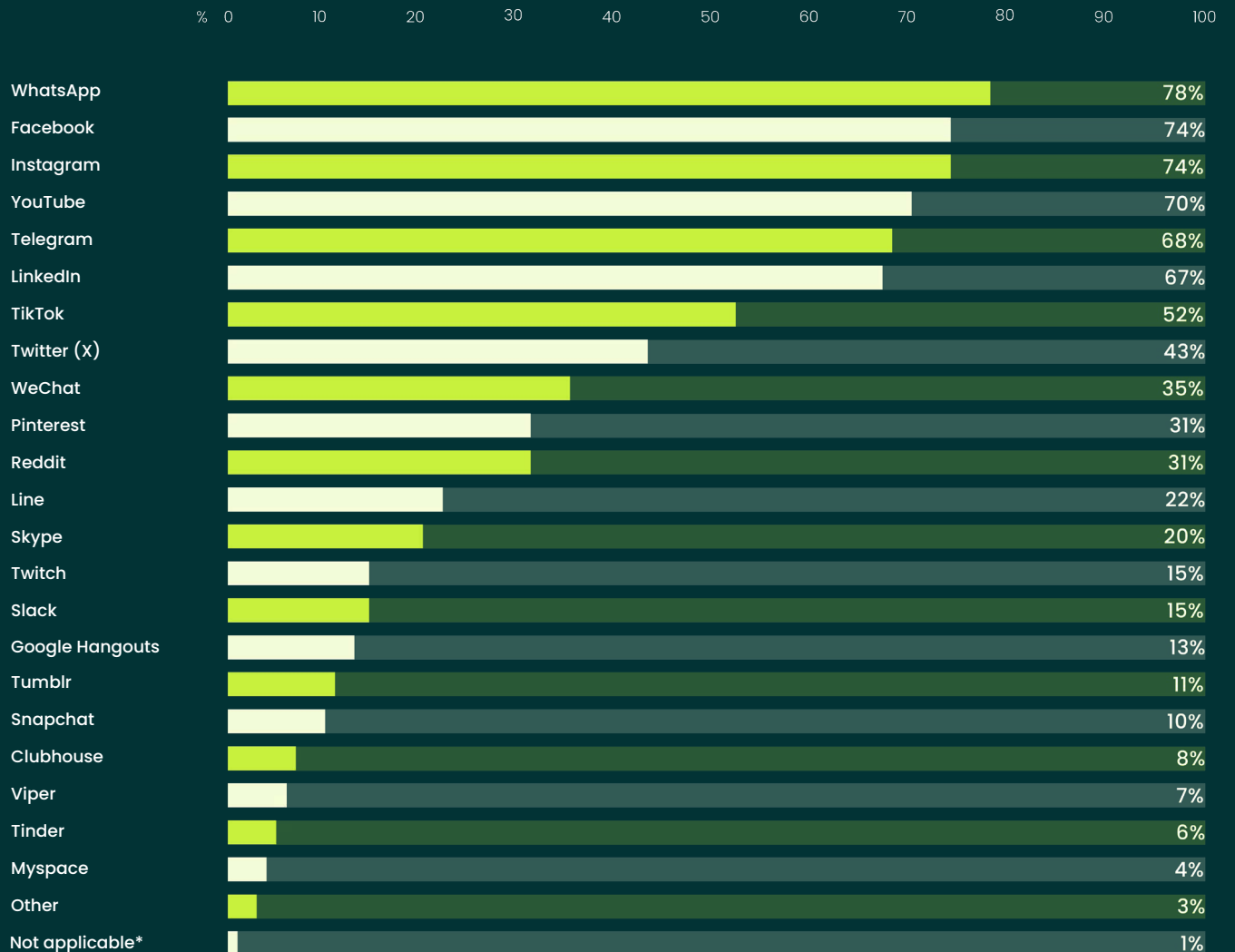
These are marketing professionals, so they are reliable users of social media – in fact just one respondent is not. There's a pretty broad mix in play, and the most frequently used platforms are no real surprise. More than 70 percent use Whatsapp, Facebook, Instagram, and YouTube, more than 60 percent use Telegram, and more than half use TikTok.

Perhaps the most interesting insight here is that only 67 percent of the business professionals we spoke to use LinkedIn, and just 43 percent use X (formerly Twitter).

As executing successful social strategies requires a solid understanding of all of the established platforms – as well as those more recently on the scene – the personal social media habits of marcom professionals warrants further exploration and discussion.

## Social media membership

Question: which, if any, of the following online social networks are you currently a member of? Please tick all that apply.



\*I am not currently a member of any social networks

