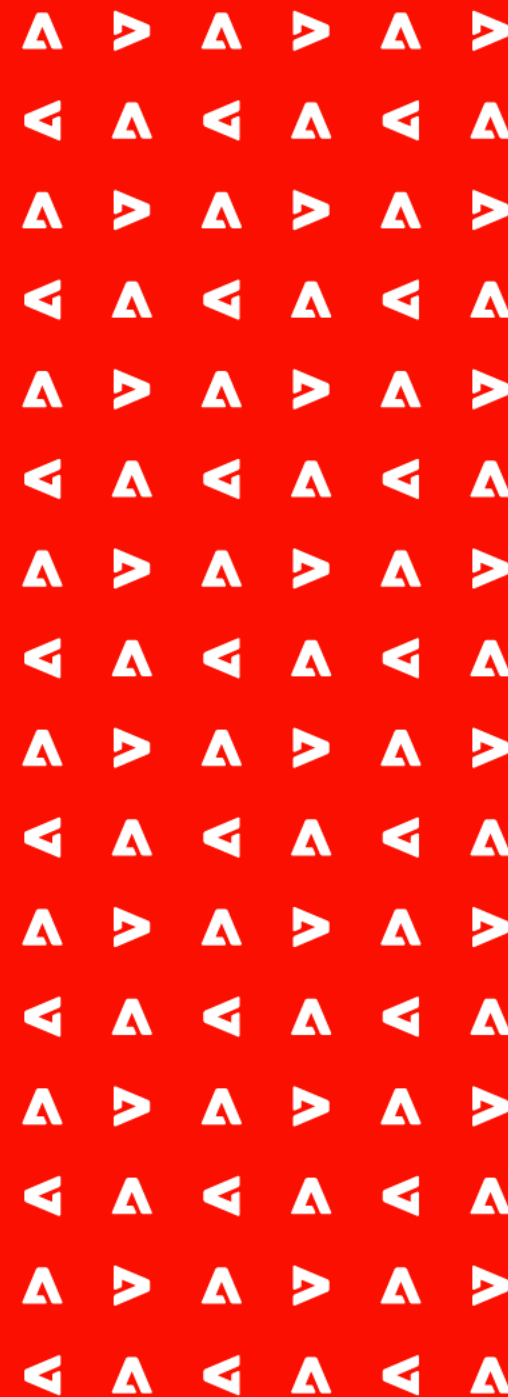




# Marketer Outlook Survey

## APAC Region (excluding Japan)

Data collected June 2020 | Adobe PR



# Highlights



## Work From Home

Currently seven-in-ten marketers are working from home (nearly half worked 1+ days a week from home prior to COVID-19). Among them, one-third feel they cannot work from home and be fully effective. To work more effectively from home, the greatest needs are for faster internet, access to specific servers/documents, and fewer distractions.

Email is deemed to be the least effective way to communicate when working from home; video conferencing/calls and phone are most preferred. Organisations will generally allow more work from home once restrictions end, expect that more in their organisation will do so long-term, and are set up effectively to enable long-term remote work. Less than one-quarter have concerns or challenges about long-term remote work.



## Brand Communication

Nearly three-quarters of organisations currently have a COVID-19 task force to manage messaging/marketing. Most organisations have shifted their imagery or language in recent campaigns.

Overall spending on marketing campaigns and advertising has slightly increased due to COVID-19 (in all countries). However, marketing spending for the remainder of this year will decrease due to COVID-19.



## The Future

A slight majority expect to proactively advertise/push out messaging within a week of stay-at-home orders ending, and expect to return to pre-COVID levels of investment in marketing within a quarter or sooner. Most organisations are seeing increases in online traffic. There will be a widespread transformation in long-term strategy and a new approach to future marketing efforts.



## Country Differences





Fewer are working from home in China (30%), with about 79%-88% working from home in other APAC countries. And those in Japan (43% effective) and Singapore (54%) work less effectively from home than in other APAC countries. Compared to the US, APAC workers have greater needs to help them work effectively from home and have made more significant adjustments. Video conferencing is the most favoured work from home communication method in China & India, while phone calls are most favoured in Singapore & Australia.

APAC investment in marketing/advertising is less negatively impacted by COVID-19 than in the US. Among APAC countries, investment is strongest in China. China & India will be significantly quicker in returning to normal than those in other APAC countries, Japan and the US.

# Methodology



Who participated in this research?

- 1,200 marketers in  China (n=329),  India (n=307),  Singapore (n=270), and  Australia (n=294) completed the survey online;
- This survey was also conducted in Japan and the US.
- To qualify, must:
  - be employed full time or a consultant, contractor, or self-employed;
  - be in advertising, business operations and services, consulting, design or creative services, marketing, product management, sale, IT, R&D, or be a company executive;
  - be directly involved in their brand's marketing activities; and
  - have an analyst role or higher within their organisation.



How was this research conducted?

- Participants were recruited from an actively managed online panel -- this should be considered a non-probability sample;
- Participants were incented using rewards points offered by their online panel;
- Research was conducted between June 2<sup>nd</sup> and June 16<sup>th</sup>, 2020.



Sample Frame

- Quotas were set for gender, and age was monitored.
- No weighting of data was required.
- Margin of error for aggregate is +/- 2.8 percentage points at the 95% CL
- Additional results can be found at <https://portal.advanis.net/adbe/>

Advanis is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. This research was sponsored by Adobe and conducted by Advanis. For information about data collection, please contact Lori Reiser (lori\_reiser@advanis.net 519.340.0125)

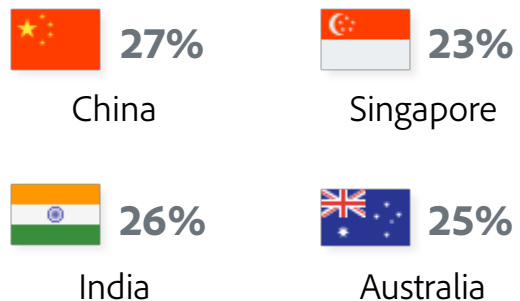
# Participant Profile



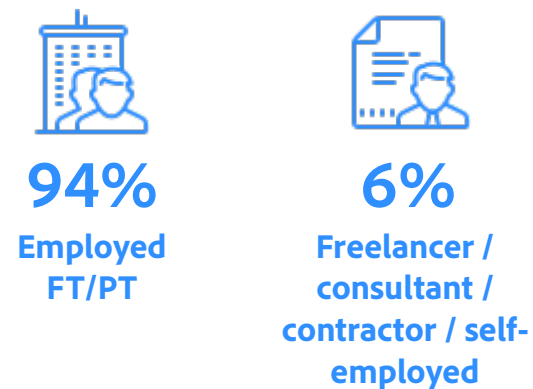
# Demographics



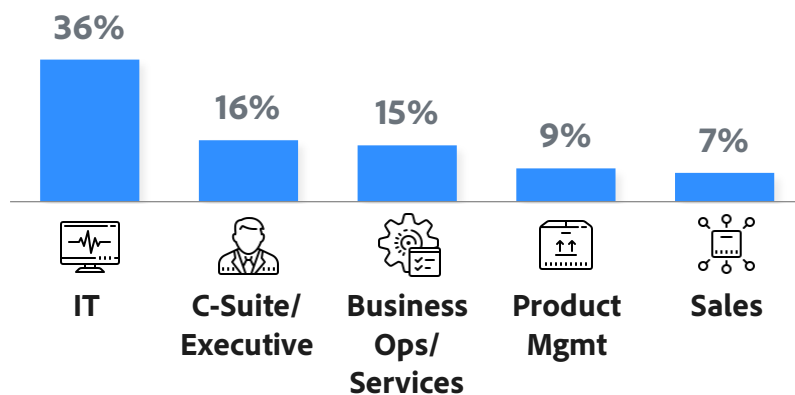
## Country



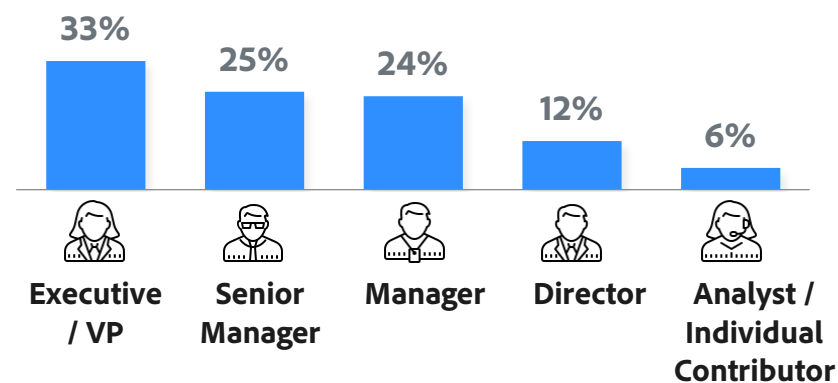
## Work Status



## Top Departments



## Job Level

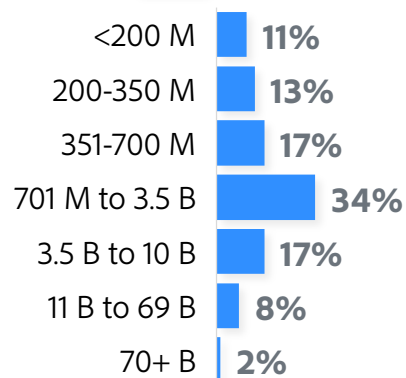


# Firmographics

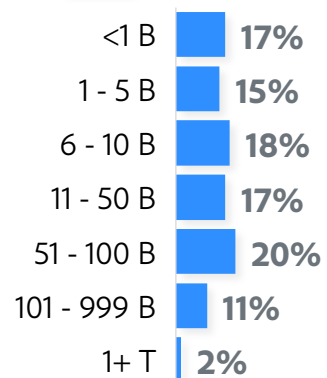


## Company Income (per year)

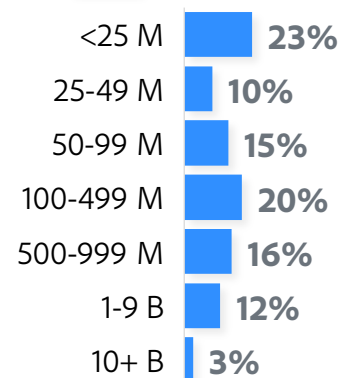
**China:**



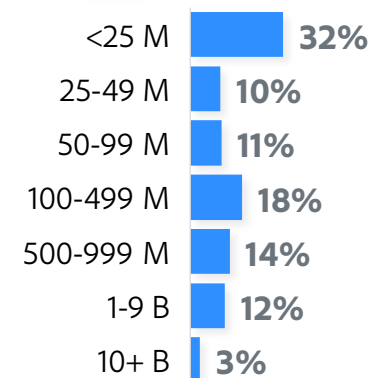
**India:**



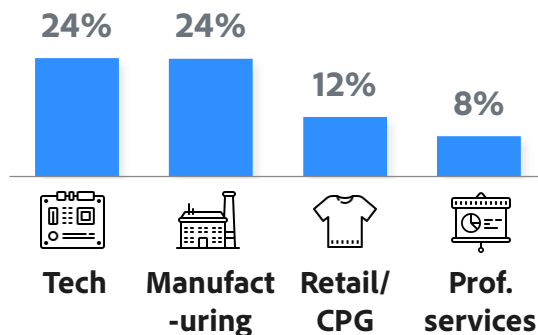
**Singapore:**



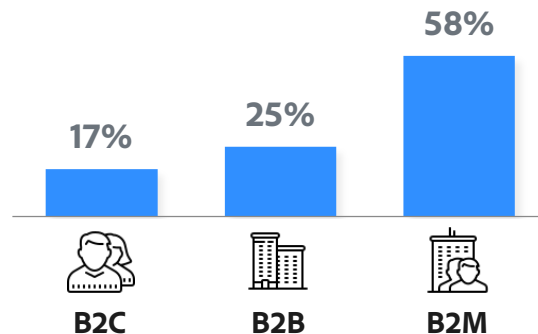
**Australia:**



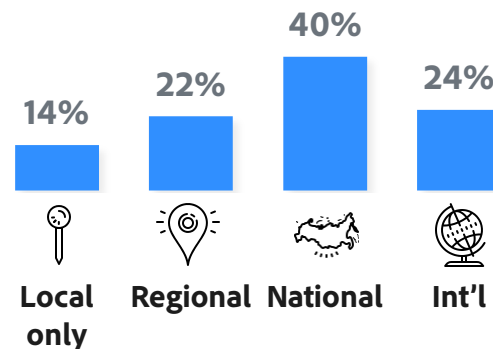
## Top Industries



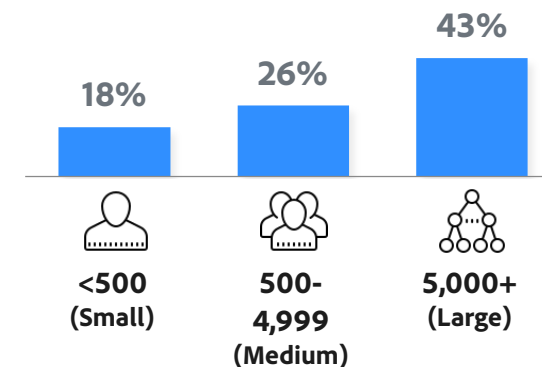
## Sells To



## Company Reach



## Employees



# Detailed Findings: Work From Home

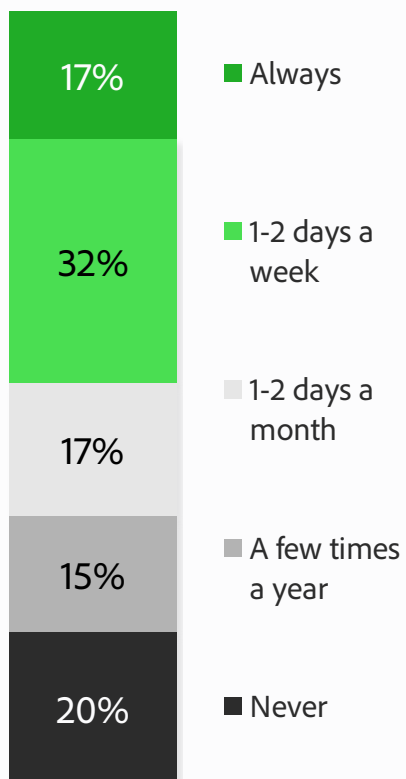


# Working From Home



## Frequency Prior to COVID-19

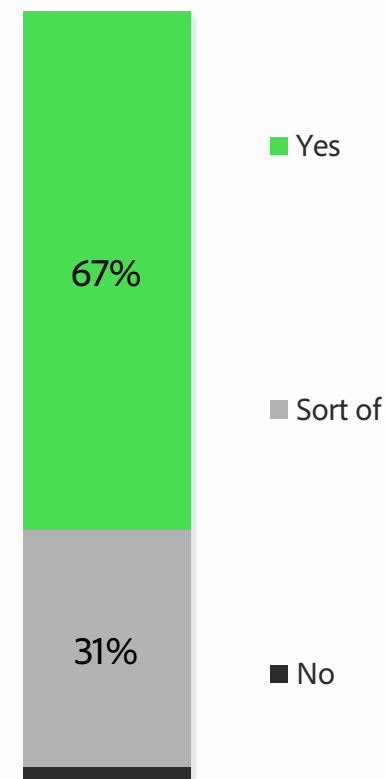
(Base: All respondents)



- **69%** of APAC workers are currently working from home.
  - Fewer are working from home in China (30%), with about 79%-88% working from home in other APAC countries.
- Prior to COVID-19, nearly half worked from home on a weekly basis or more often (17% always, 32% 1-2 days per week).
- While only 2% say they cannot effectively work from home, one-third do not feel they are fully effective.
  - Workers in Japan (43% effective) and Singapore (54%) work less effectively from home than in other APAC countries.

## Can Effectively Work From Home

(Base: Currently working from home)



Marketer Outlook Survey – APAC region (June 2020)

Q1 - Are you currently working from home? Base: All respondents (1,200)

Q1a - How often, prior to COVID-19, did you work from home? Base: All respondents (1,200)

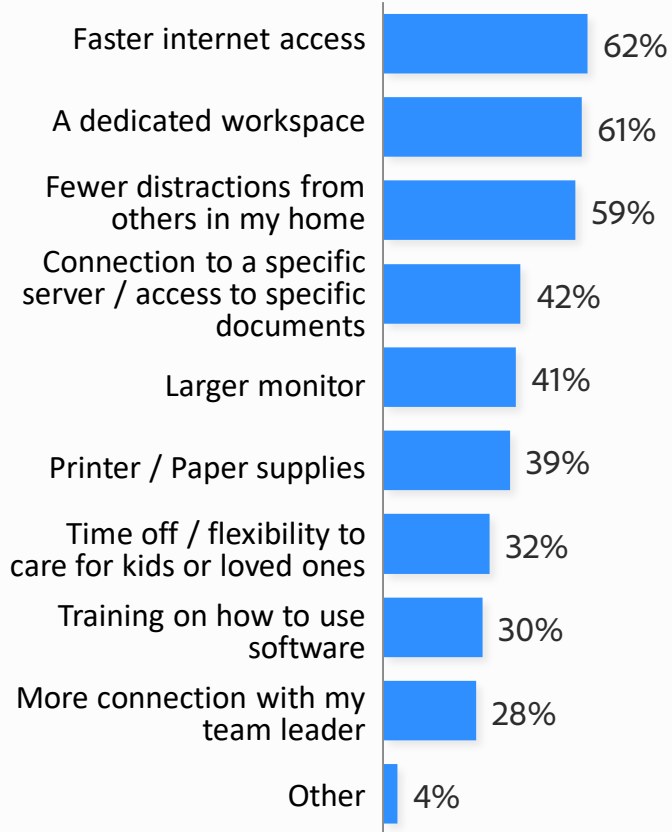
Q2 - Can you work effectively from home? Base: Currently working from home (832)



# Working More Effectively From Home

## What is Needed to Work Effectively From Home

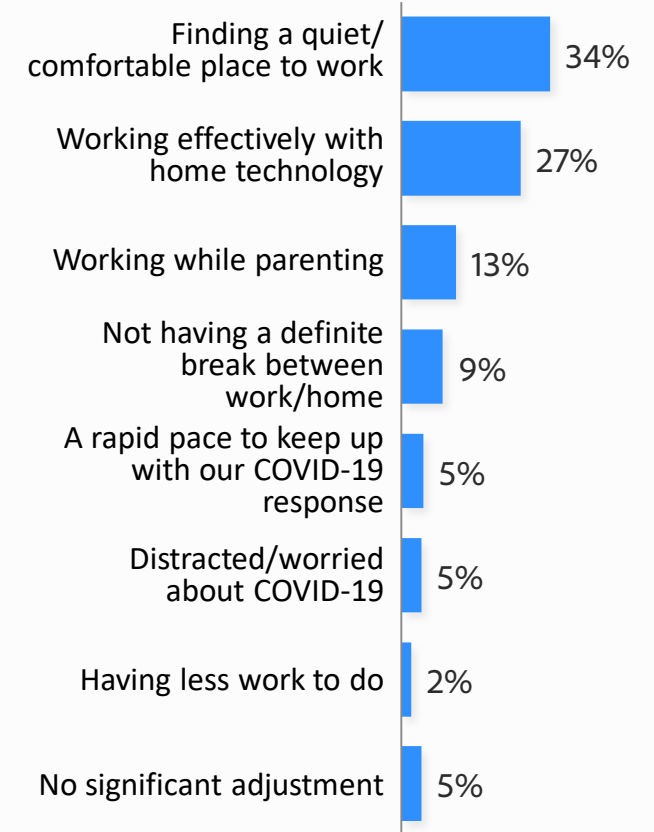
(Base: Cannot effectively work from home)



- To work more effectively from home, staff are most in need of faster internet access (62%), connection or access to specific servers or documents (61%), and fewer distractions at home (59%).
  - Those in APAC countries are more likely to need nearly all of these compared to those in the US.
- The biggest adjustments have been finding a quiet/comfortable place to work at home (34%) and working effectively with home technology (27%).
  - Workers in APAC countries are more likely to have made adjustments (95% have) than those in the US (83%).

## Biggest Working From Home Adjustments

(Base: Currently working from home)



Marketer Outlook Survey – APAC region (June 2020)

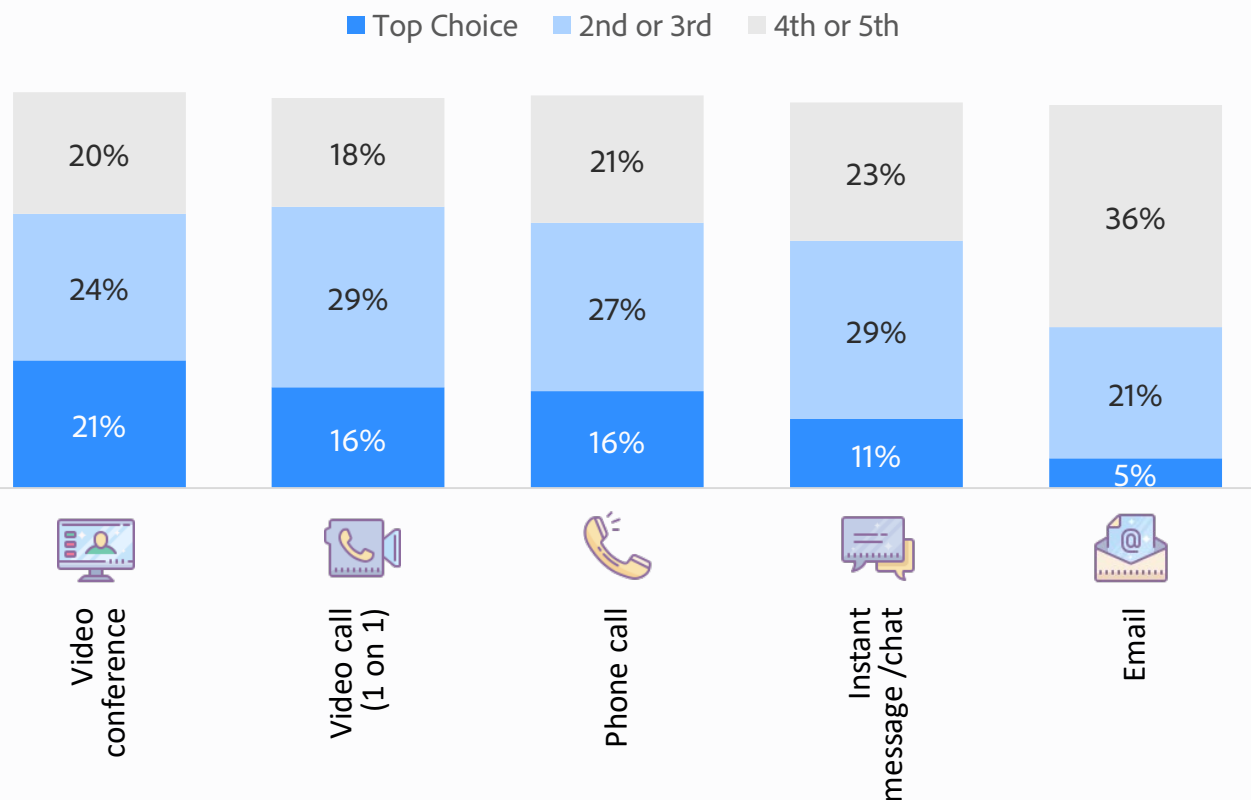
Q3 - What do you need to help you work more effectively from home? Base: Cannot effectively work from home (274)

Q3b - What has been the biggest adjustment to working from home? Base: Currently working from home (832)

# Working From Home Communication

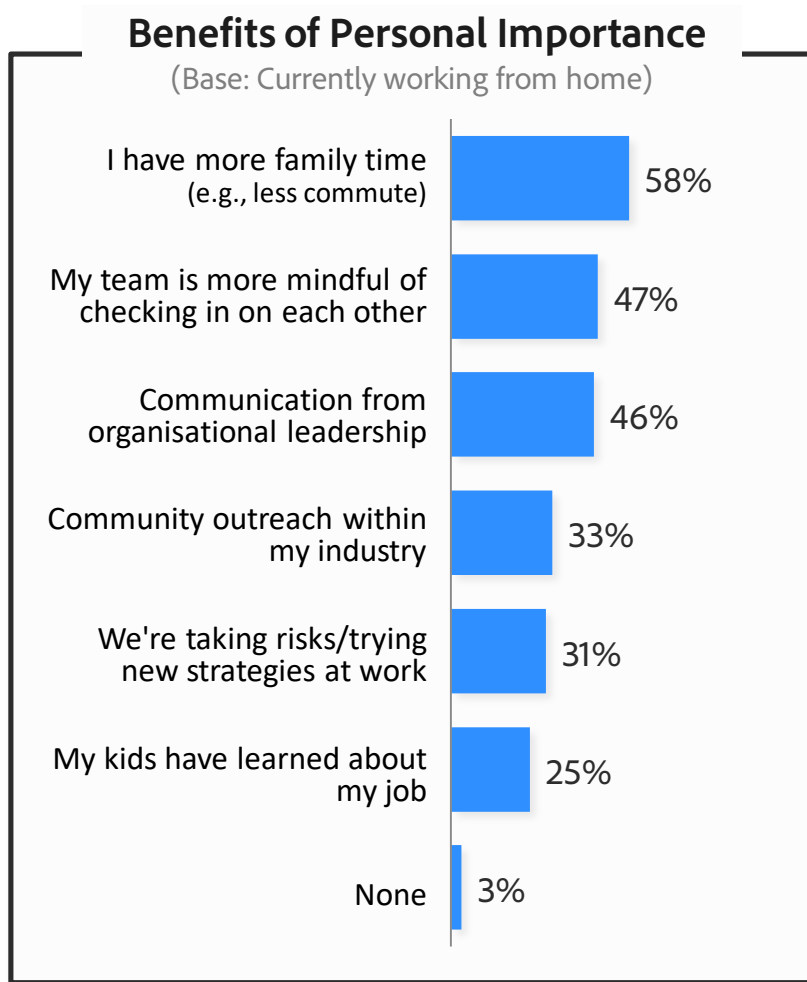


## Most Effective Ways to Communicate When Working From Home



- Between 40%-46% rank each method in their Top 3 most effective ways to communicate – with the exception of email (26%).
- The most favoured ways to communicate when working from home varies by country:
  - China: 🖥️ video conference (24% Top 3), 📞 video call (24%)
  - India: 🖥️ video conference (64%), 📞 video call (61%)
  - Singapore: 📞 phone call (56%), 💬 instant message/chat (56%)
  - Australia: 📞 phone call (51%), 📞 video call (49%), and 🖥️ video conference (46%)
- Email is deemed to be more effective by those working for small companies, and less effective by those working for large companies.

# Benefits of Working From Home



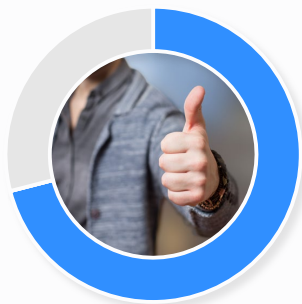
- The most valued benefit of working from home is having more family time (58% find it important). Also valued are teams being more mindful of checking on each other (47%) and communication from organisational leadership (46%).
  - Workers in APAC countries are more likely than those in the US & Japan to find nearly all items important.
  - Among APAC countries, those in China & India are more likely to find many benefits important.
  - Those in small companies tend to find fewer benefits important.

# Going Forward



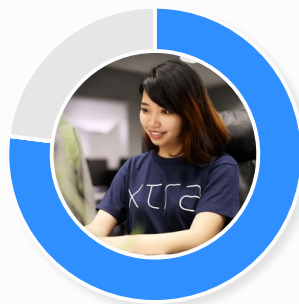
## Organisational Long-Term Remote Working Capability

(Base: Currently working from home)



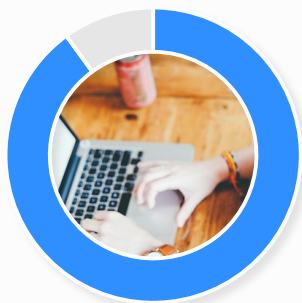
71%

Think their organisation will allow work from home once restrictions are lifted



77%

Think *more people* in their organisation will work from home long-term



90%

Think their organisation is set up effectively for long-term remote working



21%

Have *concerns or challenges* about long-term remote working

- About three quarters think their organisation will allow work from home once restrictions are lifted (71%) and that more people in their organisation will work from home long-term (77%).
- The vast majority (90%) feel their organisation is set up effectively for long-term remote work.
- About one fifth (21%) have concerns or challenges about working remotely for a long period of time.
- Compared to the US, those in APAC countries will be more likely to work from home long-term. Large companies will also allow and have more people working from home long-term.

Marketer Outlook Survey – APAC region (June 2020)

Base: Currently working from home (832); Q4a - Do you think your organisation will allow work from home once restrictions are lifted? // Q4b - Do you think that more people in your organisation will work from home long term?  
Q4c - Do you think your organisation is set up effectively for long periods of time? // Q4d - Do you have any concerns or challenges about working remotely for a long period of time?

# Detailed Findings: Brand Communication

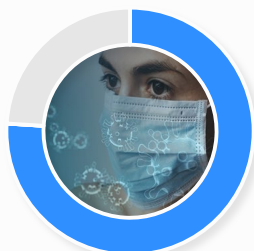


# Brand Messages Shared

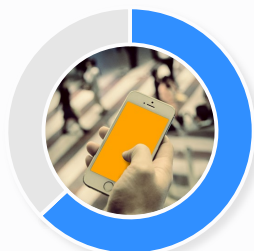


## Sent Brand Marketing Messages in Past 2-3 Weeks

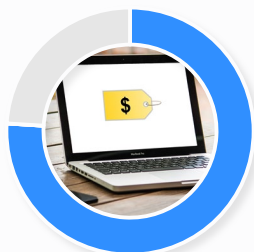
(Base: All respondents)



**76%**  
Related to COVID-19



**63%**  
Unrelated to COVID-19

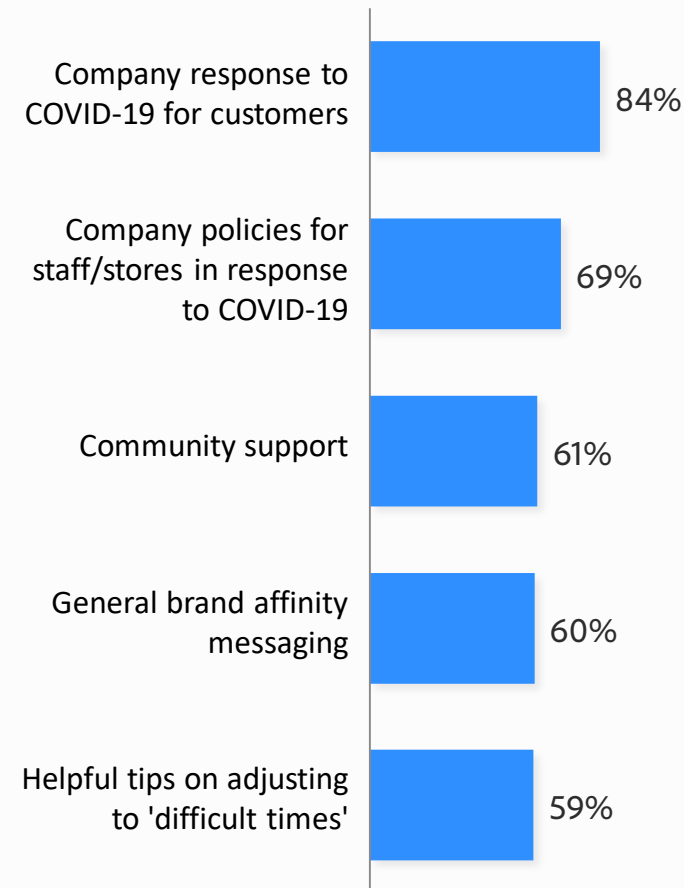


**76%**  
Sales Promotion

- 71% (48% in Japan & US) currently have a COVID-19 task force or specific team working on how to manage messaging and marketing campaign.
  - Those in Australia (55%) & Singapore (67%) are less likely to have a task force, while those in China (81%) and India (80%) are more likely.
- Over the past 2-3 weeks, most have sent brand messaging related to COVID-19 (76%), unrelated to COVID-19 (63%), and sales promos (76%).
- Organisations have most commonly sent company responses to COVID-19 for customers (84%) and updated company policies for staff/stores (69%).

## Types of Messages Being Shared

(Base: Sharing messages with customers)



Marketer Outlook Survey – APAC region (June 2020)

Q11 - Do you have a COVID-19 task force or specific team working on how to manage messaging and marketing campaigns? Base: All respondents (1,200)

Q5 - Has your brand sent marketing messages in the past 2-3 weeks? Base: All respondents (1,200)

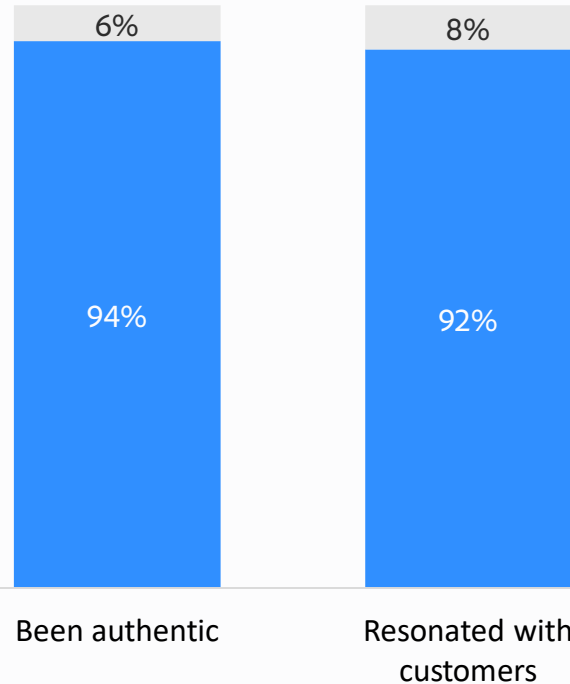
Q6 - What types of messages are you sharing with your customers? Base: Shared messages (548)

# Authenticity, Resonance, and Brand Duty



## Organisational Marketing/ Communications Have...

■ Yes ■ No



- The vast majority feel that organisational marketing/ communications have been both authentic (94%) and have resonated with customers (92%).
- There is a general sense that brands have a duty to proactively offer help or provide special offers to customers at this time.
  - This sense of duty is strongest in China (94%) and India (94%), and weakest in Australia (82%).
  - In the US, 78% say brands have this duty.

## Brand Duty



**90%**

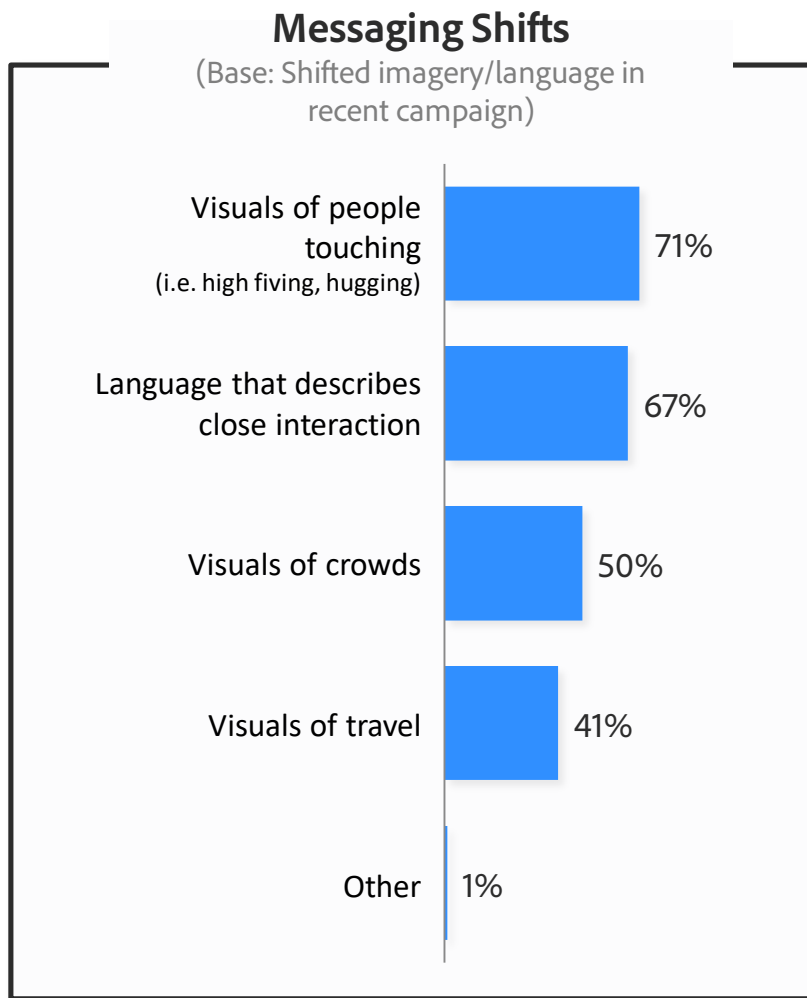
Feel brands have a *duty to proactively offer help (or provide special offers) to customers at his time*

Marketer Outlook Survey – APAC region (June 2020)

Q8a - Do you think your organisation's marketing/communication has: Been authentic / Resonated with consumers? Base: All respondents (1,200)

Q8 - Do you feel brands have a duty to be proactive in offering help (or providing special offers) to customers during this time? Base: All respondents (1,200)

# Changes in Messaging



- 56% have had to shift imagery or language in a recent marketing campaign due to COVID-19, with larger organisations being much more likely to shift.
  - Those in Australia (39%) were less likely to have shifted messaging, with those in China (67%) & India (65%) being more likely.
  - Significantly less US organisations (39%) have shifted messaging.
- The most commonly shifted elements are visuals of people touching (71%) and language that describes close interactions (67%).

Marketer Outlook Survey – APAC region (June 2020)

Q12 - Have you had to shift imagery and language with a recent campaign? Base: All respondents (1,200)

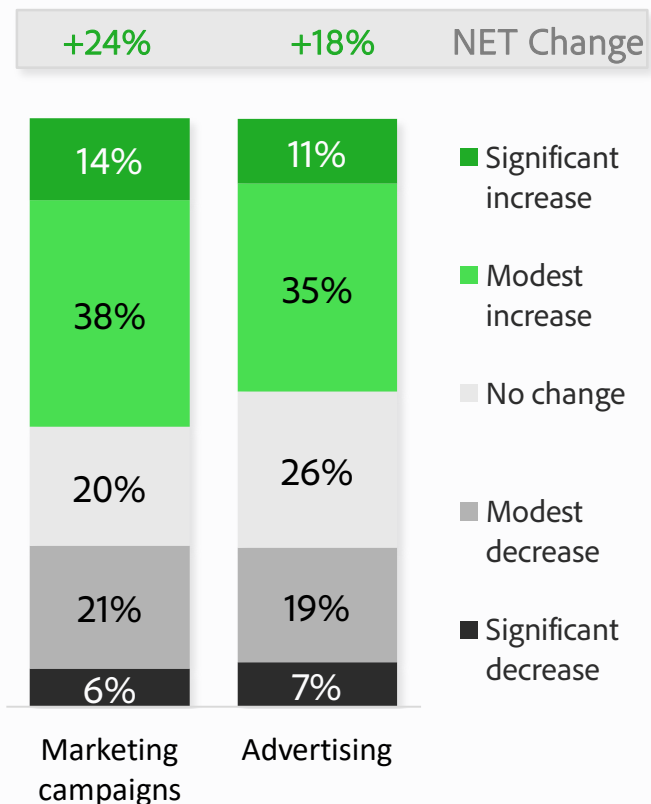
Q12a - What have you had to shift? Base: Shifted imagery or language in recent campaign (670)



# Changes in Spending

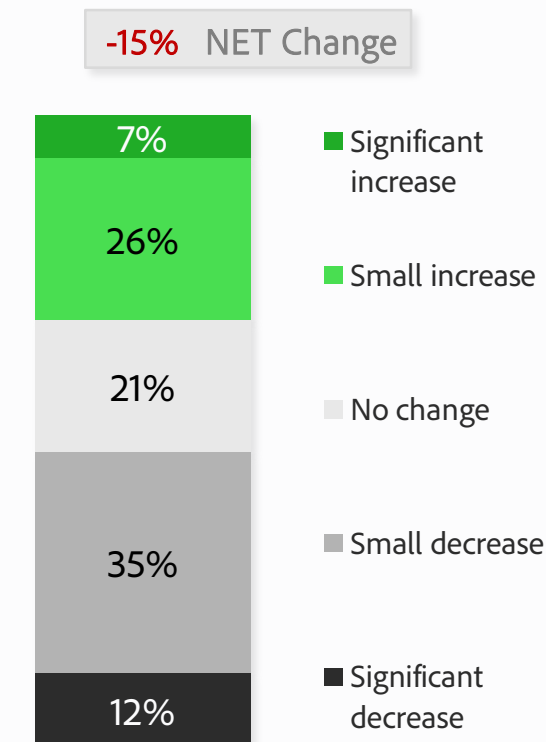


## Change in Spending Due to COVID-19



- Nearly half have increased spending on marketing campaigns and advertising due to COVID-19.
  - There has been a NET increase in each APAC country, with the largest increases in China & India and smallest increases in Australia.
  - Spending for both has been flat both in the US and for smaller APAC companies.
- In addition, marketing spending for the remainder of this year will decrease (in all APAC countries) due to COVID-19.
  - The smallest NET decrease will be in China.
  - NET decreases in spending for the remainder of the year are smaller in APAC countries than in the US & Japan.

## COVID-19 Impact on Marketing Spending For Remainder of Year



Marketer Outlook Survey – APAC region (June 2020)

Q11a - How has your spending changed in response to COVID-19 for: Marketing campaigns / Advertising? Base: All respondents (1,200)

Q16 - How is COVID-19 changing your marketing spending for the remainder of the year? Base: All respondents (1,200)

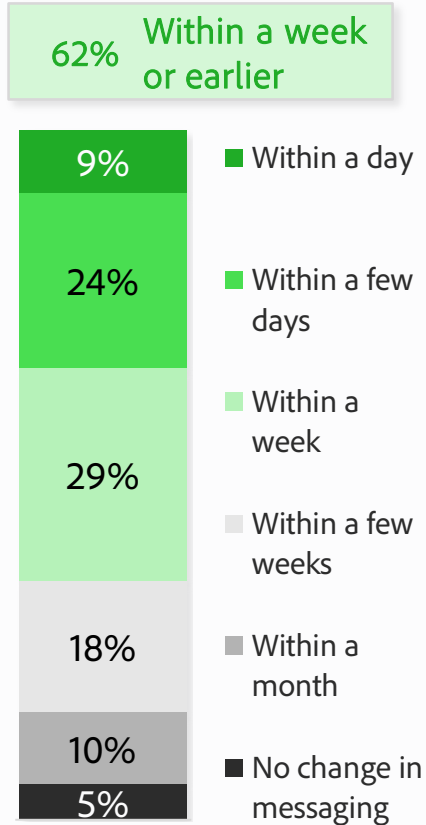
# Detailed Findings: The Future



# Timeframe for Returning to Normal

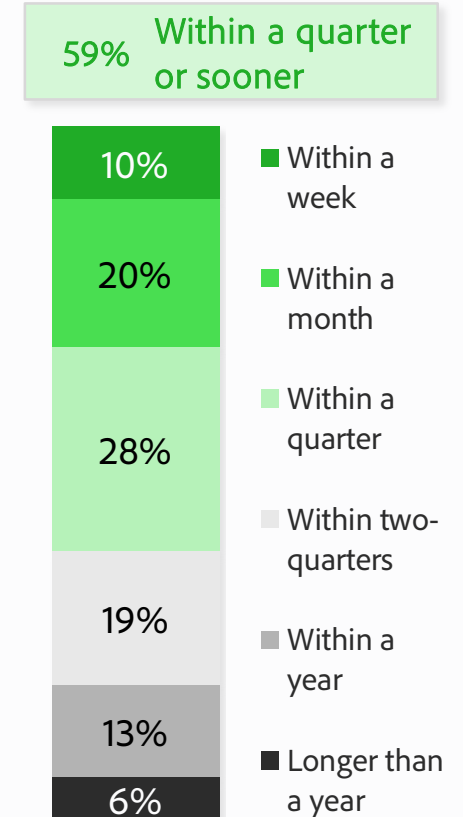


## Time Between Stay-Home Orders and Restarting Messaging



- Nearly two thirds (62%) expect to proactively advertise/push out messaging within a week of stay-at-home orders ending. Just over one quarter (28%) will wait a few weeks to a month.
  - India (73% within a week) & China (65%) will be significantly quicker in returning to normal messaging than those in Singapore (57%), Australia (51%), the US (47%), and Japan (45%).
- 59% say they will return to pre-COVID levels of investment in marketing with a quarter or sooner.
  - China (65% within a quarter) & India (75%) will be significantly quicker in returning to normal investment than those in Australia (49%), Singapore (43%), the US (43%), and Japan (38%).

## Time Before Returning to Pre-COVID Investment in Marketing

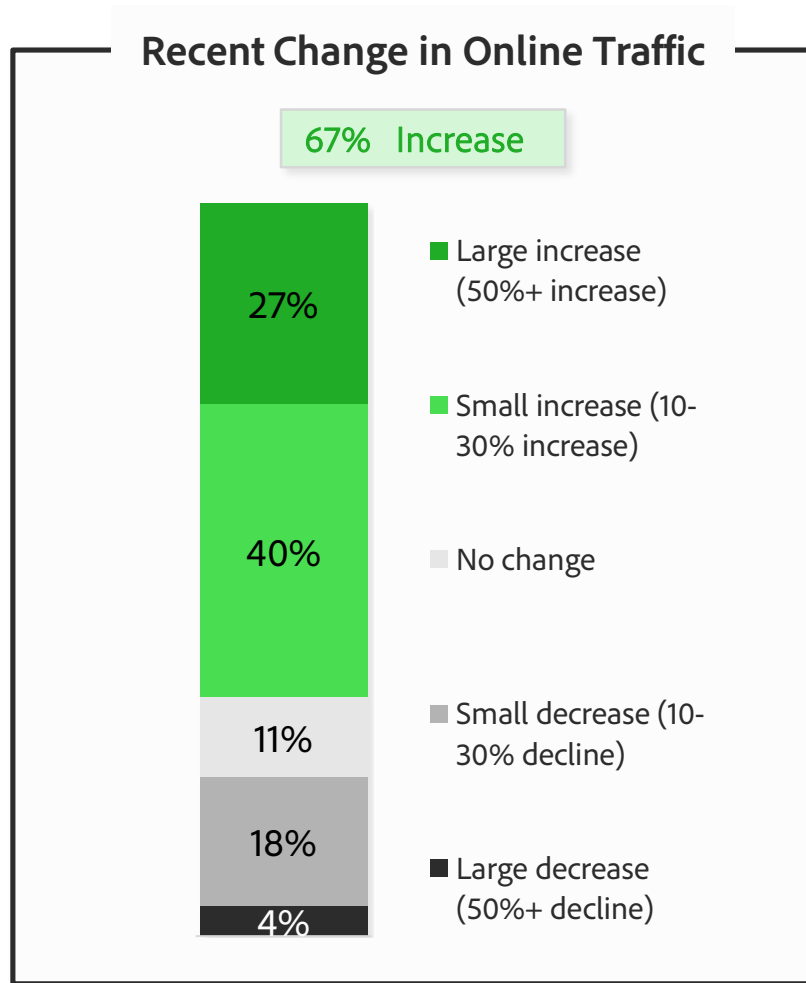


Marketer Outlook Survey – APAC region (June 2020)

Q14 - After the requests for stay-at-home/self-containment end, how long until you proactively advertise or push out marketing messages again? Base: All respondents (1,200)

Q15 - How long do you think it will take to bounce back to pre-virus levels of investment in marketing/advertising? Base: All respondents (1,200)

# Changes in Online Traffic

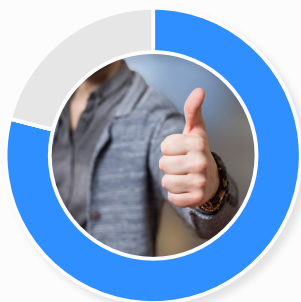


- There has been a NET increase in traffic in each APAC country, with most organisations seeing their online traffic increase (67%). Only 22% have seen decreases in online traffic.
  - The largest increases have been seen in India (77%) and for large companies (73%), while the smallest increase has been in Australia (57%).
- The NET increase in APAC countries is larger than that seen in the US & Japan.

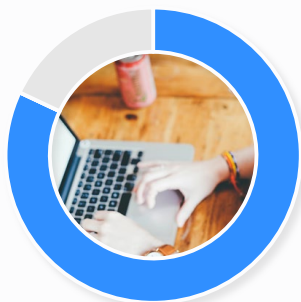
# Long-Term Impacts



## Long-Term Impacts on Strategy and Marketing Efforts



**79%**  
Transforming  
strategy long-  
term (in case period  
lasts 12+ months)

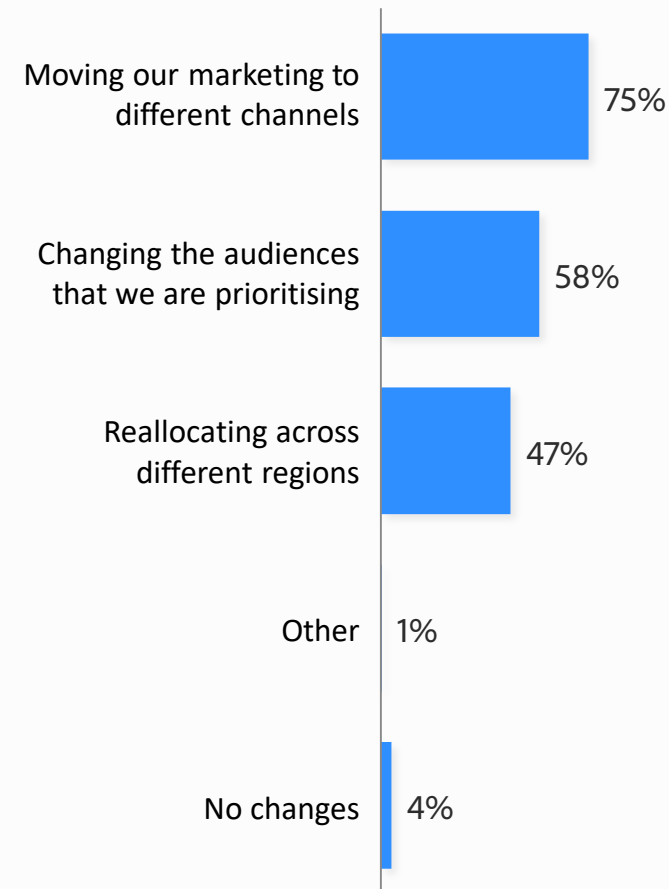


**82%**  
Will change  
approach to  
marketing efforts  
in future

- The vast majority of organisations are transforming their long-term strategy in case this period lasts over a year (79%), and changing their approach to future marketing efforts (82%), with larger organisations being more likely to make changes.
  - APAC organisations are more likely to make long-term changes compared to those in the US.
- These changes will entail moving marketing to different channels (75%), changing prioritised audiences (58%), and reallocating resources across different regions (47%).

## Changes to Marketing Efforts

(Base: Will change approach in future)



Marketer Outlook Survey – APAC region (June 2020)

Q17 - Are you transforming your strategy for the long term, in case this period lasts for 12+ months? Base: All respondents (1,200)

Q18 - Will this change the way you approach your marketing efforts in the future? Base: All respondents (1,200)

Q18a - How do you anticipate your brand marketing strategy changing over the next 12 months? Base: Will change approach to future marketing efforts (984)

