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Research reveals executive support and data-driven approach creates widening gap between digital leaders and those falling behind

A fragmented digital marketing landscape is emerging as some Asia Pacific countries surge ahead of others thanks to dedicated digital champions and executive leadership won over by measures and engagement success.

SYDNEY — September 24, 2014 — New research has confirmed widening gaps in digital marketing maturity across Asia Pacific and while all countries understand the importance and value of digital, no country is taking full advantage of the opportunities it presents.

The third annual [APAC Digital Marketing Performance Dashboard](#) was conducted by the CMO Council in partnership with Adobe. It included a six-month in-field program comprising quantitative surveys with over 800 marketing executives. The study benchmarked the levels of adoption, traction and success of digital marketing in Australia, New Zealand, China, Korea, Singapore, Hong Kong and India. Senior marketers within the Asia Pacific region from a range of industries took part, with 44 percent holding a title of Vice President or higher.

The 2014 Digital Dashboard has found that countries such as Australia, India and Singapore are pulling away with strong executive support and digital champions, while Korea, China and Hong Kong struggle with executive support and skill shortages.

"The 2014 Dashboard uncovers the varying degrees of digital marketing maturity across the region, and highlights the need for marketers to continue to demonstrate value and ROI," said Hisamichi Kinomoto, Vice President of Marketing, Adobe Japan and Asia Pacific.

"With customers able to touch any part of an organization, the role of marketing in transforming businesses is crucial and requires executive support for successful transformation.

"Organisations need to accelerate their investment in employees' professional development to close the skills gaps faster and leverage the benefits of digital. In addition, a bolder approach is needed to applying metrics and driving a more compelling case for increased investment.

"There is no doubt that undergoing digital transformation is a complex and challenging process. Adobe has been on our own journey of transformation and we understand the pain-points marketer's face as they adjust to a new digital world."

Liz Miller, Vice President of Marketing at the CMO Council said all countries can do more to leverage the vast amounts of data and intelligence that can be gathered at every touch point across the organisation.

"While more marketers in countries like Australia, India and Singapore are using analytics and reporting technologies, no country is truly taking advantage of the huge amounts of data they are collecting. Few see leveraging data as a competitive advantage, whereas globally, advancing the customer experience with deep personalization and smart adaptive engagements is driving revenue gains and measurable advantage.

"Opportunities exist for marketers to leap ahead by using data to enrich and guide the customer journey, not just reporting on KPIs or implementing a piecemeal approach."

Senior executive support drives digital marketing adoption

The Adobe APAC Digital Marketing Performance Dashboard identified that those countries with strong support for digital marketing from senior executives are moving to leadership positions. In Australia, Chief Marketing Executive ownership is at 54% in 2014, well above other countries such as India (42%), Hong Kong (40.6%) and Korea (39%). Having a strong digital champion within the leadership team remained steady across the region at 38% between

2012 and 2014, however, Australia is pulling away with 62% in 2014, followed by Hong Kong (46%), Singapore (41%) and India (39%).

The role of stakeholders in driving digital marketing

Channel partners and sales teams have emerged as strong advocates for digital marketing with more calling for increased digital spend across Asia Pacific. Since 2012, the number of channel partners and sales teams who have called for increased investment in digital has more than doubled from 15% to 34% in 2014.

Some leadership teams are not convinced of the ROI of digital marketing, but are open to learning more. Across Asia Pacific concern about ROI has risen slightly from 17% in 2012 to 21% in 2014. The Dashboard reveals that in Korea, 50% of senior leaders are not convinced of digital marketing ROI.

Small improvements in skill levels but leaders pull away

There has been a small improvement in skill levels across Asia Pacific with dedicated digital headcount increasing from 13% in 2012 and 2013, to 15% in 2014. However, gaps are continuing to grow between countries which have a dedicated digital headcount in 2014:

- Australia - 26%
- India and Singapore - 18%
- Korea - 13%
- China - 9%
- Hong Kong - 7%.

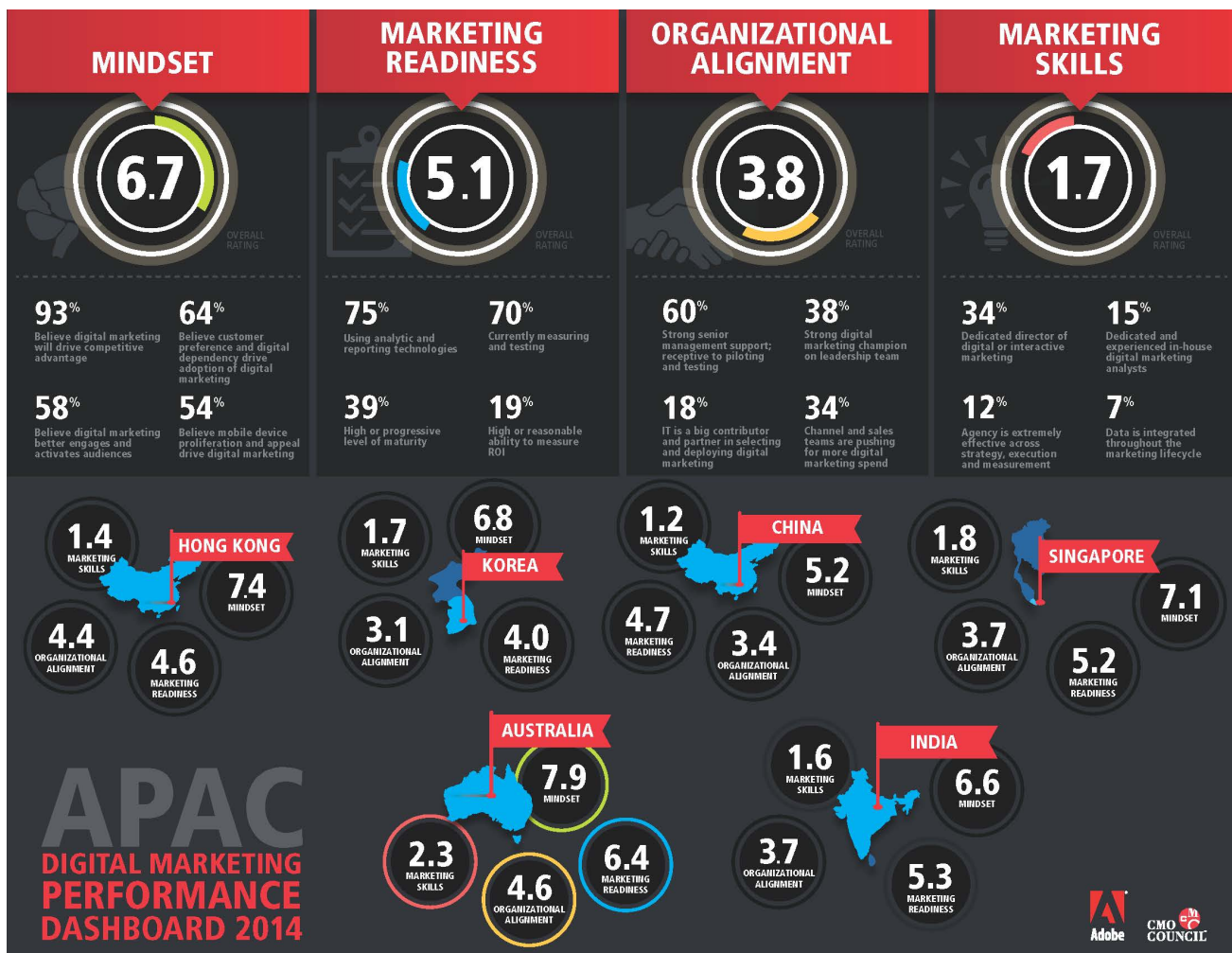
While 93% of marketers believe digital marketing can create a competitive advantage, differences in execution are evident around the region. Across Asia Pacific, use of analytics and reporting technologies has remained generally steady (72% in 2012 and 74% in 2014), but leaders are pulling away. In Australia, 91% of marketers are using analytics and reporting tools, followed by Singapore (79%), India (77%), Hong Kong (73%), China (70%) and Korea (60%).

The 2014 APAC Digital Marketing Performance Dashboard also found that marketers are not moving beyond more basic measurements. Asked whether they are measuring throughout the life of campaigns, only 13% of marketers across Asia Pacific said they were, compared with 14% in 2012.

"The good news globally is that Asia, as a region, is slowly stepping up on the global digital stage," said Miller. "The gap is closing between what has widely been considered to be advanced marketing regions like North America and Europe, as Asia is increasing spend in digital campaigns, analytics and digital automation platforms. But as Asia takes a place as a global marketing leader and not laggard, those regional markets that are falling behind will face increased global pressure to keep pace and serve as examples on the global stage. Now is the time to start making the move to digital excellence. Wait too long and the world will take notice."

Helpful Links and References

- [APAC Adobe Digital Marketing Dashboard 2014](#)
- [Adobe Digital Marketing Blog - CMO.com](#)
- [Join the Adobe Digital Dialogue LinkedIn group for news and views from APAC Marketers](#)
- Follow the conversation around the APAC Digital Marketing Performance Dashboard via #APDash
- For all the news on Adobe Digital Marketing, follow @Adobemktgcloud
- Read about [Adobe Marketing Cloud](#).



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APAC Digital Marketing Performance Dashboard Methodology

The 2014 Adobe APAC Digital Marketing Performance Dashboard was compiled through quantitative surveys with over 800 marketers across the region. Marketers from Australia, Korea, China, India, Hong Kong, Singapore and other countries responded and completed the surveys.

About the CMO Council

The CMO Council is dedicated to high-level knowledge exchange, thought leadership and personal relationship building among senior corporate marketing leaders and brand decision-makers across a wide-range of global industries. The CMO Council's 6,000 members control more than \$300 billion in aggregated annual marketing expenditures and run complex, distributed marketing and sales operations worldwide. In total, the CMO Council and its strategic interest communities include more than 20,000 global executives in more than 110 countries covering multiple industries, segments and markets. Regional chapters and advisory boards are active in the Americas, Europe, Asia-Pacific, Middle East, India and Africa. The Council's strategic interest groups include the Coalition to Leverage and Optimize Sales Effectiveness (CLOSE), LoyaltyLeaders.org, Marketing Supply Chain Institute, Customer Experience Board, Market Sense-Ability Center, Digital Marketing Performance Institute, GeoBranding Center, and the Forum to Advance the Mobile Experience (FAME). More information on the CMO Council is available at www.cmocouncil.org.

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