



PRCA ASIA GO-TO-MARKET PRIMER





BY CAROLINE HSU CHIEF GLOBAL OFFICER, THE HOFFMAN AGENCY AND CO-CHAIR, PRCA APAC

Asia is the world's largest and most populous continent, accounting for 30% of the Earth's total land area. And within that landmass sit more than 50 markets and territories, home to an abundance of ethnic groups, religions and approximately 2,500 living languages. If there's one word you'd use to describe this region, it's **diverse**.

Yet when it comes to the comms landscape, I have seen **many** briefs where Asia is treated as a monolith - and agencies responding as such, in turn.

What do I mean by this? Imagine, a multinational corporation that has decided to intensify its presence in Asia - for argument's sake, let's call it 10 markets. The organisation has a 1-2 person team managing comms for the region. They may not even be based in Asia. So how do they approach this?

A classic scenario might see the communications team assigned a budget from headquarters to split across as many markets as they can reach. It might see them create a global strategy, used to direct in-market execution, and centralise all content development to maximise efficiencies. Markets need simply translate and place.

It's logical. It's cost-effective.

The question is, does it actually move the needle? Perhaps once upon a time, when much of Asia was still agricultural in nature. But those days are long gone.

Nowadays, the more that Asia grows and innovates, the more fragmented and individualistic its markets become. The more these markets demand to be recognised - for their size and population, for their digital maturity and technological prowess, for their rapidly-growing economies, for their unique cultures, customs and beliefs.

In other words, trying to create stories that speak to everyone often results in stories that speak to no-one.

We at PRCA APAC believe it is our responsibility to ensure that comms programmes here in Asia are just as meaningful, creative and profound as what has long been the way in the West. And that starts with providing brands and fellow agencies with the insights needed to better inform go-to-market strategies.

My industry colleagues and I are proud to bring you this first edition *Asia Go-To-Market Primer* as an initial step in achieving this goal. Herein, you will find profiles (or as we've fondly dubbed them, "crash courses") for 13 key markets throughout the region. These are by no means exhaustive - in fact, I'd say they only scratch the surface. But it's our hope that each will offer a small glimpse into what it takes to navigate the complexities of an Asia programme.

A final thought - that multinational corporation with a one-person team managing 10 markets in Asia will need proof of ROI to be able to invest more. But I'd argue that going to town with a localised communications strategy in two priority markets will offer far more dramatic results than spreading resources to desperately try and cover 10.

All the best,

Just H

China & Greater China

www.apac.prca.global

China A Tier of Its Own

Home to a seventh of the world's population, it's safe to say that China is big. Huge. And as the world's second largest economy, it holds considerable sway within the Asia Pacific region. For example, in 2022, China increased the overall margin of its influence compared to the United States in Southeast Asia to 54-46.

Much of this comes down to rapid economic growth, which in the past 40 years has averaged at around 9% annually. Despite ongoing US-China tensions, the economy is still projected to grow a further 4-5% in 2024. Many boil this down to the stability of China's one-party government, which facilitates efficient decision and policy-making, as well as the equal strength of its domestic and export markets.

Given its vast expanse, China has designated centres of industry, tiering its cities according to level of influence. Major metropolises like Beijing and Shanghai drive the nation's financial and technological ambitions, while its second-tier cities typically specialise in manufacturing and export industries. This approach optimises resource allocation and diversifies the economic landscape.

KEY SECTORS IN CHINA



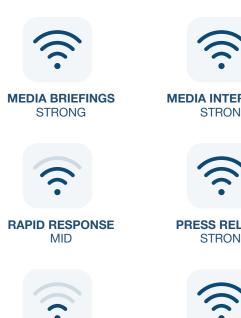
As you might imagine, China's media landscape is extensive, both horizontally and vertically – but is also heavily censored. All media are required to obtain an official permit to operate, and all content is subject to regulatory approval. The right to operate remains separate to the right to publish.

Media outlets can be broadly categorised under the following umbrellas (note, this list is not exhaustive):

- State-owned, including Xinhua News Agency, China News Agency, CCTV, People's Daily, Global Times, China Daily
- Business, including China Business News, 21st Century Business Herald, National Business Daily
- Mass media, including portal websites such as Tencent, Netease, Sohu and Sina
- Regional media, spanning Eastern, Western, Southern and Northern China
- Business and interest verticals, including semiconductors, automotive, healthcare, food and consumer technology

It's important to recognise, however, that China's digital landscape may well be more important than traditional news outlets when it comes to influence. Many communications programmes in China centre first and foremost around developing profile and prominence on WeChat – an all-encompassing app that combines everything from messaging and social networking to payments, ride-hailing, ordering and more.

MEDIA OUTREACH IN CHINA



OPINION PIECES WFAK

MEDIA INTERVIEWS STRONG



PRESS RELEASE STRONG



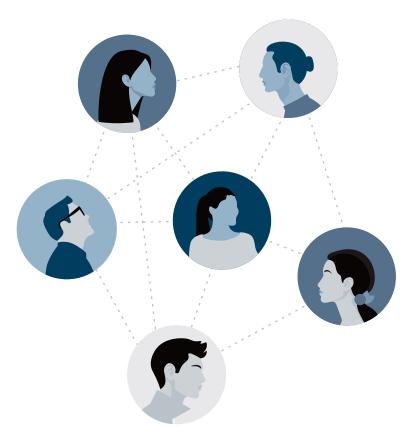
INDUSTRY EVENTS STRONG

INFLUENTIAL DIGITAL PLATFORMS



The regulatory landscape in China is complex, ever-changing, highly-industry specific but ultimately, absolute. In fact, many organisations enter China by establishing local partnerships or joint ventures to help them navigate the fluctuating intricacies of Chinese bureaucracy. It's also worth noting that what an organisation says outside of China is as important as what it shares within the nation's borders. There are several celebrities, for example, that are banned from China after having taken a stance on sensitive issues such as territory.

Building goodwill or "guan xi" in China is otherwise considered crucial to business success. Most decision-making is done outside the boardroom by developing relationships over drinks or meals. It's also relatively common to see people 'pop by' a contact's office when they happen to be in town with little warning required. The same can be said for media engagement – reaching out for an informal, no-coverage expected meet & greet before "selling" your story is considered best practice.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in China is Chinese Yuan (RMB).

Hong Kong An Evolving Identity

As the dust settles on Hong Kong's new political structure, the city is reclaiming its status as a vibrant cosmopolitan hub and international finance centre. A special administrative region (SAR), Hong Kong retains much of its autonomy, with separate legal, administrative and judicial systems in place. Coupled with low taxation and virtually free port trade, this means the city is well-positioned as a strategic entry point into mainland China, acting as a beacon of economic growth and innovation throughout the region.

In recent years, Hong Kong has also aggressively established new and additional pillars of economic activity. For example, in 2023, the Secretary for Innovation, Technology and Industry announced that Hong Kong will establish the Microelectronics Research and Development Institute, underscoring Hong Kong's commitment to advancing semiconductor technology. Meanwhile, Hong Kong's Innovation and Technology Development Blueprint demonstrates the city's vision to become an international innovation and technology centre.

KEY SECTORS IN HONG KONG



Though bustling city it may be, Hong Kong's media landscape is shrinking – partially through natural consolidation as social media and digital platforms siphon advertising dollars away from traditional titles; and partially due to the changing business climate.

Self-censorship is more widely practiced among local titles, while several international media outlets have chosen to move their Asia Pacific operations elsewhere. A few more outspoken publications have shuttered altogether. That said, notable titles including the likes of *Bloomberg News, Reuters* and *South China Morning Post* continue to call Hong Kong home.

It's worth noting that while many journalists are proficient in English, fluency can be harder to come by, especially those working in local publications. As such, it's typically recommended that any press materials also be translated into Traditional Chinese for ease of access. For editorial and content, Traditional Chinese (commonly used in Hong Kong and Macau) is different to Simplified Chinese which is practiced in Mainland China and should not be confused.

MEDIA OUTREACH IN HONG KONG



MEDIA BRIEFINGS STRONG



RAPID RESPONSE WEAK



OPINION PIECES MID



MEDIA INTERVIEWS STRONG



PRESS RELEASE STRONG



INDUSTRY EVENTS MID

INFLUENTIAL DIGITAL PLATFORMS



There are several unwritten rules in Hong Kong as to what is considered respectful and polite, much of which centres around the concept of saving 'face' face here representing a person's dignity and reputation. Things you may come across include:

- Being mindful of when you compliment or give feedback to someone so you don't cause them to lose 'face'
- People initially refusing gifts or you paying the bill in a restaurant – you are expected to insist that they accept
- Accepting business cards, documents, gifts etc. with two hands. With business cards, also taking the time to study them before carefully tidying
- Introducing people in order of seniority, and deferring to them when decisions need to be made
- A lot of small talk and very subtle sales tactics

 don't be surprised if you don't get down to
 business until the second half of a meeting

Much of Hong Kong's culture also navigates deeply ingrained superstitions. Among the most prominent are the concept of *Feng Shui*, which looks at how to create harmonious environments by capitalising on positive energy forces; unlucky numbers, colours and gifts (avoid #4, clocks, and minimise black and white); and conversely lucky elements (including #8, red and gold).



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Hong Kong is Hong Kong Dollars (HKD).

Taiwan The World's Connective (Digital) Tissue

Globally, Taiwan is well-known for politics and semiconductors (indeed, often the two are tied). But as one of the 'Four Asian Tigers', Taiwan's dynamic business landscape, fuelled by a skilled and highly educated workforce is far more expansive than may meet the eye. Boasting a thriving start-up scene, Taiwan places a strong emphasis on technology, manufacturing, and innovation. In fact, analysts predict that Taiwan will have over 100 unicorn companies by 2031.

Amidst both cross-strait and global geopolitical tensions, ease of doing business has understandably fluctuated in recent years. Organisations looking to operate in the market will need to carefully navigate several factors including regulations, trade relations and supply chain resilience. That said, Taiwan's export-reliant economy is still predicted to grow approximately 3-4% this year.

KEY SECTORS IN TAIWAN



Taiwan is among the freest and most competitive media environments in Asia, though much of its landscape is polarised by politics. On the flip side, Taiwan also has one of the lowest levels of trust in the media according to a 2022 Reuters Institute Survey – primarily thought to be due to sensationalist tendencies, vulnerabilities around disinformation and, in certain circles, self-censorship.

This is perhaps why in-person engagements and press events remain crucial in Taiwan's media landscape – journalists will prioritise firsthand information. It is also why agencies will always recommend erring on the side of caution when it comes to taking a stance on sensitive political issues. For a market of only 24 million people, what's perhaps most striking is the expansiveness of Taiwan's media landscape. It has approximately 600 TV and radio stations, 2,500 newspaper publishers and more than 4,000 magazine publishers. Today, Taiwan's media outlets span online, video and social media platforms, as well as a declining print circulation. Notable titles include *Yahoo! News* and *Line News* (Line being a popular messaging app).

MEDIA OUTREACH IN TAIWAN



MEDIA BRIEFINGS STRONG



RAPID RESPONSE WEAK



OPINION PIECES MID **?**

MEDIA INTERVIEWS MID

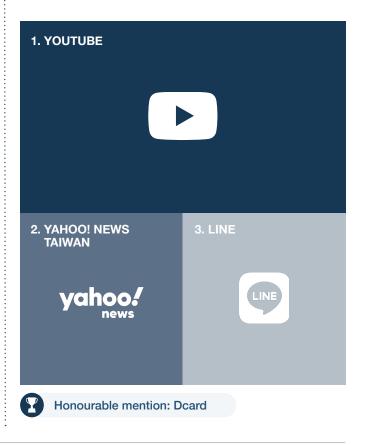


PRESS RELEASE STRONG



INDUSTRY EVENTS STRONG





Navigating tensions between Taiwan and China requires a **cautious** approach. When sharing case studies, partnerships and success stories in Taiwan, corporations must ensure content targeted to the broader Chinese market is appropriately localised for Taiwan. It's crucial to know the political leanings of each publication - in other words, whether their writing focuses on a unique Taiwanese identity, or a closer partnership with China.

Meanwhile, given the extremely competitive nature of the Taiwanese media, make sure you avoid any hints towards favouritism, as it may well jeopardise longterm relationships with other journalists. For example, if you're hosting a press event, be sure to invite all tier-1 media, including the four key daily newspapers, four key business magazines, and at least five online outlets. Exclusives should be used sparingly.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Taiwan is New Taiwan Dollar (NTD).



North Asia

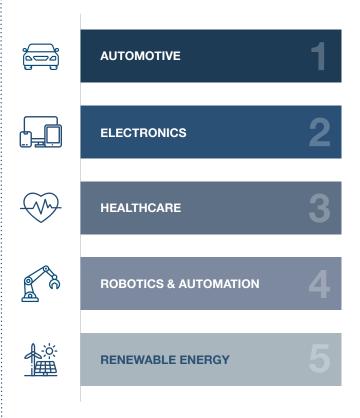
Japan A Reawakening

After years of economic stagnation, Japan is undergoing somewhat of a revival, giving cause for optimism in a market known the world over for its conservatism and hierarchical societal structures. Despite slipping to fourth place in the global economic rankings, and a revolving door of prime ministers since 2006 (averaging just one year in office), investors are looking to Japan with renewed interest amid signals that the *Nikkei 225* stock index is 'back'.

Efforts are underway to re-establish Japan's prominence in key sectors, most notably semiconductors. The recent arrival of chip giant TSMC in Japan's Kumamoto prefecture marked the first of several major planned semiconductor manufacturing investments as the nation looks to reignite its domestic production capabilities and, more broadly, reclaim its title as a leading-edge technological landscape.

Indeed, in the face of a rapidly ageing society, businesses - large and small - across every sector in Japan are facing a shortage in talent. Digital transformation - in the form of Al and automation is the word on everyone's lips and the agenda in everyone's boardroom.

KEY SECTORS IN JAPAN



Press freedom is typically upheld in Japan, but the weight of tradition is heavy. Though declining, traditional media formats have held up well in Japan relative to many other markets. Exposure in national newspapers such as *Nikkei, Yomiuri* and *Asahi*, as well as major broadcasters including *NHK*, *Fuji TV* and *Nippon TV* still goes a long way in establishing credibility as an international brand. Meanwhile, social media use – especially in B2B communications – is limited.

Japan otherwise has an uncommonly large number of specialist-interest media, many of which continue to exist in print as well as online – and they like nothing more than to get deep into the weeds on technical details. Hard news and product briefings or 'study sessions' tend to be the order of the day, while thought leadership gets little play. This is not to say that opinion is ignored, but the concept of publishing any form of unpaid content originating from the brand side is still nascent. It's also worth noting Japan's unique press club system. It sees journalists from the biggest national newspapers and TV channels stationed at desks within government ministries and administrative agencies, public organisations, and industry and economic organisations (e.g. *Tokyo Stock Exchange* and the *Chamber of Commerce and Industry*) to provide ongoing coverage and news support. Japanese companies and organisations often bring press releases directly to the press clubs. In Japanese public relations parlance, this is called "throwing in".

INFLUENTIAL DIGITAL PLATFORMS

MEDIA OUTREACH IN JAPAN



Japan is renowned for its cultural uniqueness and has a reputation for being an extremely difficult market to 'get right' - for good reason. In linguistic terms, Japan is the highest context society in the world. In other words, this is a nation where social cues, unwritten rules of etiquette and 'reading the air' are of utmost importance – you should be paying far more attention to what is not said than what is. It's for this reason that companies often opt for joint ventures and channel partners when entering this market or have large local teams on ground as compared to other territories – this truly is a place where it takes a local to get a local.

Japan is also deemed the most consensus-driven nation in the world – which seems paradoxical given its extreme adherence to hierarchy, yet is crucial to business operations. In essence, this works by rung – for example, if middle management are given a project, they will first collect group agreement among peers. When all are in consensus, they then pass the project up the chain for the next rung to approve, and the process continues all the way up until the final decision-maker. This essentially means that while it takes a long time for projects to be approved, execution goes at lightning speed.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Japan is Japanese Yen (JPY).

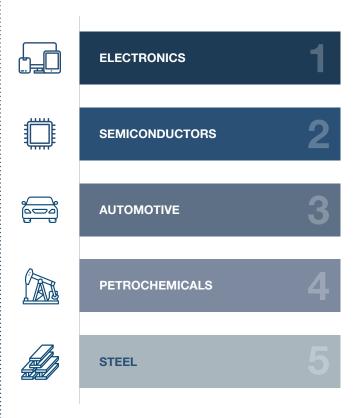
South Korea A Sharp Eye

With the rising popularity of all things K-culture, it feels like everyone's talking about South Korea these days. But prior to the likes of *BTS* and *Squid Game*, South Korea already boasted a long history of economic success, with real GDP growth averaging at 7.3% annually between 1960 and 2019.

Much of the government's strategy has focused on transforming South Korea into a technology powerhouse. The nation is already one of the world's largest producers of semiconductors, rivalling Taiwan's reputation, and dominant in the memory chips market. It's also home to global brands including Samsung, LG and SK. And it has plans – in its New Growth 4.0 Strategy - to add space exploration and self-driving technology into the mix.

That said, South Korea is ranked fifth globally in terms of ease of doing business, actively attracting foreign investment and companies to set up a base. Notable names include Apple, TSMC, AWS and Google. The key, very often, lies in localisation – the more you understand the unique psyche of the South Korean people, the more likely you are to succeed.

KEY SECTORS IN SOUTH KOREA



For what is a comparatively small nation of 51 million people, the South Korean media landscape is extensive, with approximately 18,000 registered outlets – the majority of which are online. Naturally this creates a highly competitive environment, so to keep the peace, it's important companies treat every title – regardless of tier or reach – equally by providing similar opportunities to interviews and press events. Newswire distributions are also commonplace.

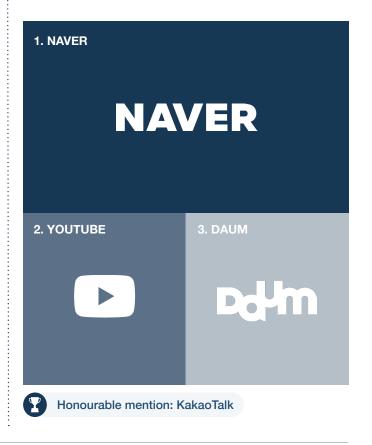
Do not be surprised if South Korean reporters prioritise domestic brands first and foremost – there is a great sense of national pride for home products. The best way to get through is to demonstrate commitment to the local community and economy. A landscape that overall sees freedom of press, reporters are otherwise vocal and thorough in South Korea – keep in mind that if the tide were ever to turn, that means an organisation would need a robust plan of action in place. The best way to de-escalate is to ensure you've built relationships with journalists in advance. It's worth noting that South Korea has a unique digital ecosystem compared to the rest of the world. Naver and Daum are the nation's main online portals (though Google's presence is growing). To improve SEO rankings, many organisations also have a Naver blog. Meanwhile, KakaoTalk is South Korea's main messaging app. LinkedIn, however, is relatively wellrecognised as a platform for corporate messaging across B2B and B2C.

Image: Note of the second se

MEDIA OUTREACH IN SOUTH KOREA

OPINION PIECES STRONG INDUSTRY EVENTS STRONG

INFLUENTIAL DIGITAL PLATFORMS



The regulatory landscape in South Korea is complex and stringent, while labour unions hold great power. To thrive in this market, organisations must exhibit a deep understanding of market needs, sentiment, psyche and cultural idiosyncrasies. This goes far deeper than translations and avoiding 'sensitive topics'.

One of the best ways to build trust and understanding is in bars and restaurants. Always accept dinner invitations – this is a South Korean's way of assessing whether they want to engage you further – and ideally, offer invitations in return. Note that South Korea is also a hierarchical (and paternalistic) society that prioritises conformity over individualism – greet people in order of status and seniority and keep attire crisp and conservative.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Korea is South Korean Won (KRW).



Southeast Asia

Indonesia A Land of Unicorns

The largest economy in Southeast Asia, and the 16th largest economy in the world, Indonesia is one of the fastest emerging markets globally. The world's most populous Muslim-majority nation, Indonesia is a market brimming with potential – it has a young and digitally-savvy population, a rising middle class and is home to the second largest number of unicorns in ASEAN after Singapore. Indeed, many expect Indonesia to be the next hotbed for startup innovation in the region.

Indonesia's most recent elections mark a pivotal moment in the nation's trajectory, ushering in a period of heightened expectations and speculation around the potential implications on policy decisionmaking. That said, despite Indonesia standing at the crossroads of political change, it's expected that broad economic policy will remain largely similar to that of the previous government.

KEY SECTORS IN INDONESIA



Indonesia has a vast and expansive media landscape, particularly online – but quality can vary dramatically from title to title. Layoffs are a common threat as media houses struggle to make ends meet – in fact, recent industry research suggests that half of titles are planning to retrench reporters. This leads many of the remaining journalists to resort to cut-andpaste journalism to meet the burgeoning demand for content. This also means that it's not unusual for media opportunities to be accompanied by a nominal fee, even when 'earned'.

TV viewership and podcasts have increased in popularity since the outbreak of COVID-19, but in Indonesia's highly-connected society, social and alternative media (including "homeless media" online news sources with no traditional portal/website) now compete on equal footing with reputable and established media brands. Influencers also hold significant sway among consumers. While the press in Indonesia theoretically enjoy a significant degree of freedom to express a wide variety of views – and indeed, coverage in Indonesia can be extremely polarised – it's important to note that the last few years have seen changes in digital expression. Although initially intended to regulate ecommerce activities, the 2008 Electronic Information and Transactions Law is sweeping – meaning that any kind of electronic communication, including social media, could be subject to scrutiny and penalties.

MEDIA OUTREACH IN INDONESIA



MEDIA BRIEFINGS STRONG



RAPID RESPONSE WEAK



OPINION PIECES MID **?**

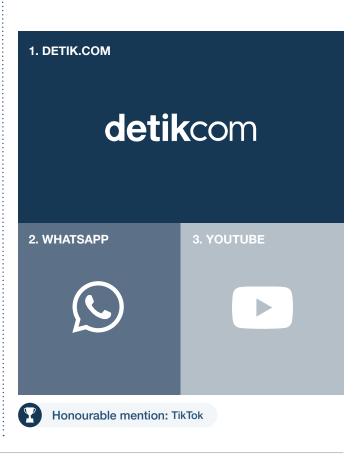
MEDIA INTERVIEWS MID



PRESS RELEASE STRONG



INDUSTRY EVENTS WEAK



INFLUENTIAL DIGITAL PLATFORMS

Indonesia is the world's largest archipelago consisting of over 17,000 islands and numerous ethnic groups – so suffice to say its culture is... complex. It's therefore worth keeping in mind that many of the images you might typically associate with Indonesian culture are, in fact, reflective of only one of the dominant subgroups or an amalgamation of many.

Indonesians are a spiritual people, taking religious practices very seriously – and Islam is by far the dominant religion, representing 95% of the population. You will see that much of Indonesia will adhere to Islamic law and customs, impacting areas such as diet, dress code and views around LGBTQ+. That said, Indonesia is in fact a secular nation – the country also recognises Christianity, Hinduism, Buddhism and Confucianism.

Keep in mind that Indonesians are extremely communal. It is not unusual to see Indonesians sharing the same household (or at least neighbourhood) among different generations, or even with extended family. The culture upholds values of collectivism and encourages inclusiveness.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Indonesia is Indonesian Rupiah (IDR).

Malaysia The Emerging APAC HQ

Better known internationally for its beaches, buzzing rainforests and world-class food scene, Malaysia is a multi-ethnic, multi-religious and multilingual country. It is also a fast-growing international manufacturing and shared services hub. In particular, the country's northern state of Penang is globally renowned as an electrical and electronics powerhouse, and plays host to several organisations in the global semiconductor supply chain.

Newly industrialised, Malaysia enjoys an affluent lifestyle, and shares many cultural similarities with its neighbouring Singapore, being at once conservative, diverse and dynamic – while offering a costcompetitive location and comprehensive physical and digital infrastructure for organisations looking to enter the region.

After a post-Covid period of turbulent politics, Malaysia has since stabilised with the ascent of a new coalition government. Historically an agricultural economy, Malaysia is increasing its efforts to accelerate national digitalisation via an initiative known as the *Malaysia Digital Economy Blueprint* (MyDigital). It is also actively looking to increase foreign direct investments and attract business to the market. Indeed, according to the World Bank, Malaysia ranks 12th globally for ease of doing business.

KEY SECTORS IN MALAYSIA



After going through significant consolidation in recent years, traditional media in Malaysia is in decline, while new media is on the rise. Indeed, some publications have done away with print altogether and converted fully to digital. Meanwhile, several broadcasters have begun exploring alternative streaming options across social media.

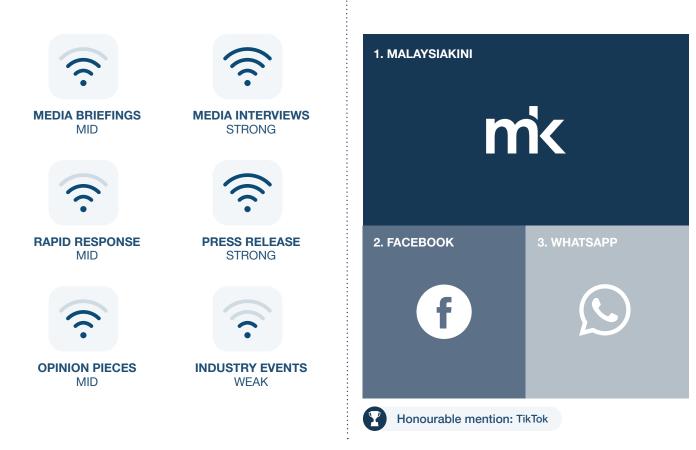
Informal relationship building, along with occasional paid content partnerships go a long way in Malaysia, and are crucial to nurture trust and goodwill. This should, however, not be mistaken as a therefore 'easy' market to get coverage - a strong local angle will always trump all.

The media community are comparatively tight-knit in Malaysia – group briefings and sharing of information among journalists are common practice. While a handful of mainstream and trade journalists may be hard-hitting with their questions, the media are also generally easygoing, some even bordering on shy. It's therefore not unusual for journalists to flock around spokespeople after press events, as opposed to during, to ask their questions.

Although Malaysia does censor media coverage, especially when it comes to politics, royalty and racial or religious affiliations, the country ranks top in Southeast Asia in the World Press Freedom Index.

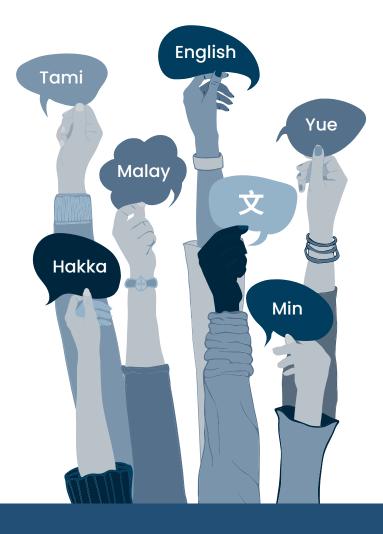
INFLUENTIAL DIGITAL PLATFORMS

MEDIA OUTREACH IN MALAYSIA



Malaysia is secular, but as the most prevalent religion, Islam exerts a strong influence on daily life. It is important to respect its norms and parameters. Seasonal greetings and modest gift-giving are standard practice, particularly around the holy month of Ramadan.

The country is otherwise home to speakers of more than 130 living languages, each accompanied by their own cultural and/or tribal heritage. It is extremely important for businesses to draw a distinction between Peninsular Malaysia (which includes the national capital of Kuala Lumpur) and East Malaysia (otherwise known as the Borneo States), which retain a high degree of autonomy. Bahasa Malaysia (Malay) is the official language, but English, Mandarin and Tamil are also widely spoken, and several national publications cater specifically to these demographics.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Malaysia is Malaysian Ringgit (MYR).

Singapore Small and Mighty

Only 49 kilometres from one end to the other, what Singapore doesn't have in size, it makes up in people, diversity and location. Multicultural at its core, Singapore boasts one of the world's best education systems according to the latest results from the OECD. Home to one of the most significant ports in maritime trade, Singapore is also a conduit for approximately 200 shipping lines. So it's perhaps no surprise that the "Switzerland of Asia" was recently named the world's best place to do business by the Economist Intelligence Unit.

Coupled with the fact that Singapore is ranked number one in the world for political and operational stability, enjoys strong investor confidence and is accelerating at full speed towards its ambitions of becoming the world's first truly smart nation, numerous large multinational corporations headquarter their Asia Pacific operations in Singapore and use it as their springboard into the broader Southeast Asian and APAC regions. Some, such as Dyson, have even relocated their global headquarters to the city state.

KEY SECTORS IN SINGAPORE



Like many markets around the world, Singapore has a small and dwindling media pool – but keeping its size in mind, we really do mean small. And given there is such an active business community in the city, this means media attention is hard to come by.

However, there's value in fighting for that space – Singapore is the regional base for several significant international media organisations, including the *BBC* and *CNBC*. Its local media houses – *Mediacorp* and *SPH Media* – are also influential beyond Singapore's borders.

It is, however, important to note that Singapore's media is tightly controlled, including strict press rules around any speech that is "deemed to be seditious, defamatory, or injurious to religious sensitivities", where individuals will be subjected to penalties. To pique journalist interest, a strong local or regional angle that demonstrates market commitment is therefore required. Some may even go as far as nationalistic. Additionally, LinkedIn has been gaining prominence as an alternative platform for brands and thought leaders to reach their key audience, and establish credibility through pushing out owned thought leadership content. Notably, the introduction of *LinkedIn News Asia* signifies a significant development of LinkedIn as a news platform, with a team of global journalists creating and curating insights for professionals across numerous countries and languages.

MEDIA OUTREACH IN SINGAPORE



MEDIA BRIEFINGS WEAK



RAPID RESPONSE MID



OPINION PIECES STRONG (î.

MEDIA INTERVIEWS STRONG

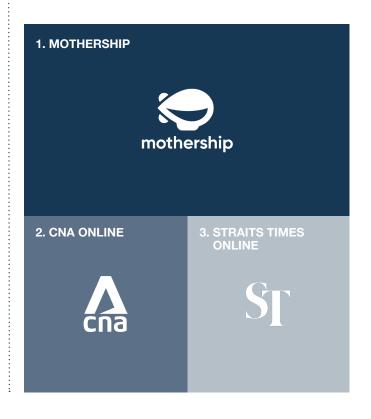


PRESS RELEASE MID



INDUSTRY EVENTS MID

INFLUENTIAL DIGITAL PLATFORMS



The majority of Singaporeans are bilingual in English, and one of the other three official languages – Chinese, Malay and Tamil. This is representative of Singapore's ethnic make-up – and is one of the reasons why incoming businesses will find the nation to be decidedly more international in its mindset compared to other neighbouring countries. In fact, there are initiatives and infrastructures in place in Singapore to ensure the different cultures mix on a regular basis.

Keeping this in mind, it is crucial for businesses to enter Singapore with a high level of cultural intelligence. If there is food served at an event, for instance, be sure to ask about dietary requirements (e.g. halal, vegetarian). Another example might be the importance of national holidays (e.g. Chinese New Year, Ramadan).



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Singapore is Singapore Dollar (SGD).



Thailand **The Lotus Blooms**

Within the space of a single generation, Thailand has elevated its status from a nation primarily characterised by agriculture and lower incomes to one of the world's best development success stories. As the economy matures and efforts are made to equip the workforce with skills that will meet the emerging needs of the economy, attentions have turned to Thailand as an alternative manufacturing centre amid rising costs in neighbouring Southeast Asian markets (noting that Thailand already has a long history in electronics). Thailand is also increasing its appeal as a premier destination for international MICE.

Thailand's divisive politics are well-known the world over, not least of all several military coups. But despite the ups and downs of Thai politics, the economy has always managed to power through and maintain a steady pace of growth. This has plateaued in recent years, but as the current government pursues "proactive diplomacy", global estimates expect Thailand to continue along its trajectory of growth, with a particular focus on green and sustainable markets.

KEY SECTORS IN THAILAND



Although TV remains an important source of news among older generations, Thais are among the world's most active social media users in the world – leading to online platforms becoming key channels for consuming and disseminating news. This means Thailand's media landscape is extremely fragmented and often characterised by sensationalism (though note, Thailand also has a distinct group of broadsheets and business publications).

This has resulted in mounted efforts to police the internet in Thailand for fake news – a move that has been described by some as an attempt by the Thai government to limit freedom of expression in the kingdom. Self-censorship is already widely practiced when it comes to politics and the Royal family, though there are some notable exceptions. Many major TV stations are also owned or controlled by the Royal Thai Army and/or the government, shaping the narrative disseminated to the masses.

Very few journalists speak English in Thailand, so it is highly recommended that international organisations put forward Thai-speaking spokespeople wherever possible, and if not, have a Thai-speaking company representative accompanying leaders to all engagements.

MEDIA OUTREACH IN THAILAND



MEDIA BRIEFINGS MID



RAPID RESPONSE WEAK



OPINION PIECES WEAK **•**

MEDIA INTERVIEWS MID

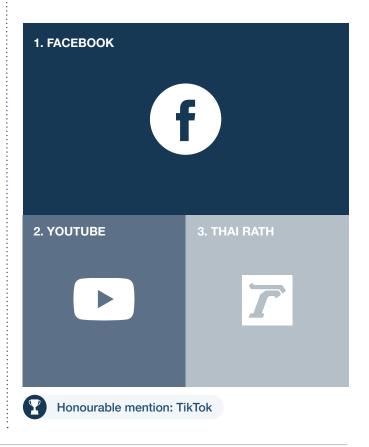


PRESS RELEASE STRONG



INDUSTRY EVENTS MID





Fondly dubbed the 'Land of Smiles', Thailand is generally considered a welcoming and inclusive country. That said, there are a couple of specific trigger points organisations should be mindful of when entering Thailand.

First, Thailand is a predominantly Buddhist nation – Buddhism holds cultural and spiritual significance for much of the population. As such, any behaviour that is deemed disrespectful, including inappropriate usage of Buddha's image (e.g. a Buddha head mug or pillow) can attract outrage.

Meanwhile, the Royal family in Thailand is considered the kingdom's absolute authority. Any commentary on the Royal family, both positive and negative, is strongly discouraged. This even cascades to colour choices – for example, yellow is considered a royal colour and is typically reserved for the family. Red, on the other hand, has recently been associated with an antimonarchy movement. To err on the side of caution, neutral colours are the best choice.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Thailand is Thai Baht (THB).



The Philippines **Rising with the Tides**

The Philippines is a geographically diverse country, with equally diverse lifestyles and traditions owing to its 7,107 islands. Known for its rich culture, beautiful landscapes and friendly locals, the Philippines is currently the fastest-growing economy in the region.

Despite being one of the most severely affected countries by COVID-19, the Philippines emerged from the pandemic on a path to economic recovery. Limited by regulations on face-to-face interactions, businesses and the public adapted to remote work and e-commerce, accelerating the adoption of digital technology in the country.

The transportation, storage, construction and financial services industries saw significant growth driven by the resumption in commercial activities, while the country's growth outlook remains positive, with expected greater foreign investment, improvement in the labor market and easing inflation.

KEY SECTORS IN THE PHILIPPINES



Television remains the most popular medium in the Philippines. *GMA Network Inc.* is the largest broadcaster in the country. However, a clear divide is beginning to form as television and radio continue to have higher penetration rates in rural and provincial areas, while urban areas are seeing lower penetration rates for broadcast media.

Indeed, the Philippines is seeing a shift to digital with the proliferation of streaming services and social media. 95.5% of the Filipino population are active on social media, leading to a rapid increase in online influencers, content creators, and vloggers, who have developed devoted followings in various online platforms. Mainstream media outlets have also adopted a strong online presence, using platforms like Facebook and YouTube to tell their stories and share it with the public. Philippine media companies are largely owned by business tycoons and their families. Despite the high number of media outlets, the market is traditionally concentrated among the biggest media conglomerates in the country owned by the political elite. But with the rise of digital platforms comes information democratisation, with emerging online media like news websites and blogazines flourishing outside of the traditional framework. One such example is the rise of *Rappler*, an online news site founded in 2012 by former *CNN* News Bureau Chief in Manila and Jakarta, Maria Ressa, who was eventually awarded with the Nobel Peace Prize in 2021 for her efforts in safeguarding freedom of expression.

MEDIA OUTREACH IN THE PHILIPPINES



MEDIA BRIEFINGS MID



RAPID RESPONSE STRONG



OPINION PIECES MID



MEDIA INTERVIEWS STRONG

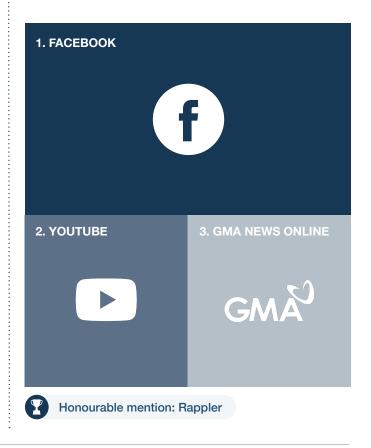


PRESS RELEASE MID



INDUSTRY EVENTS WEAK

INFLUENTIAL DIGITAL PLATFORMS



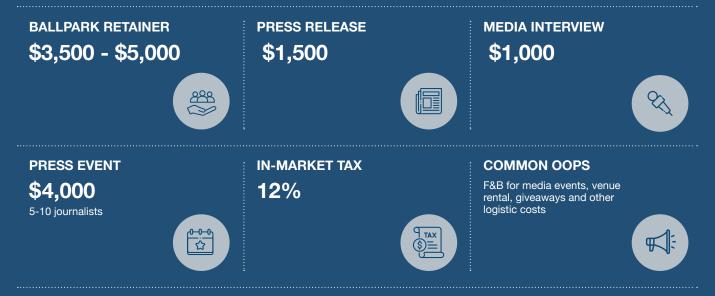
Filipinos value unity, respect and courtesy, stemming from their cultural value of "bayanihan" (from the Tagalog word "bayan" meaning town, nation or community). Bayanihan literally translates to "being in a community" and is about embodying the spirit of communal unity that promotes mutual collaboration and support. This adds to their reputation of being warm and hospitable hosts, which extends to their professional interactions.

You may find that, keeping the above in mind, Filipinos ask a lot of personal and family-oriented questions and expect the same in return. Equally, they may ask you for favours and privileges on the basis of your relationship - those who are gracious and flexible enough to support these requests will find Filipinos to be extremely generous with any help they can offer in return. The Philippines is secular, but Catholicism is the most prevalent religion. Meanwhile, though Filipino is the official national language (Tagalog, though similar, is considered a separate dialect), English is broadly used in business. You may also find Filipinos mixing languages within the same breath in conversational situations.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in the Philippines is Philippine Pesos (PHP).

Vietnam **The Bamboo Diplomat**

As with many nations in Southeast Asia, Vietnam is another rapidly developing economy as the country shifts from a predominantly agricultural landscape to a manufacturing and services hub. Even during the initial outbreak of Covid-19 in 2020, Vietnam was one of the few economies to record positive growth at 2.91%. However, there is more behind its success than its industrial profile.

Vietnam has emerged as one of a handful of winners in a world otherwise currently characterised by deglobalisation thanks to its mastery in 'bamboo diplomacy' – or in other words, its ability to balance ties with East and West. This diplomacy is built upon the premise of four key boundaries – no military alliances, no picking sides in conflicts, no foreign military bases and no use of force in international relations. To quote *Forbes*: "Officials are open to doing business with anyone as long as they aren't dragged into quarrels."

Combined with increased investments in education and infrastructure, alongside a slew of government policies to attract foreign investment, Vietnam has carefully positioned itself as the perfect outpost for international organisations looking to de-risk their supply chains.

KEY SECTORS IN VIETNAM



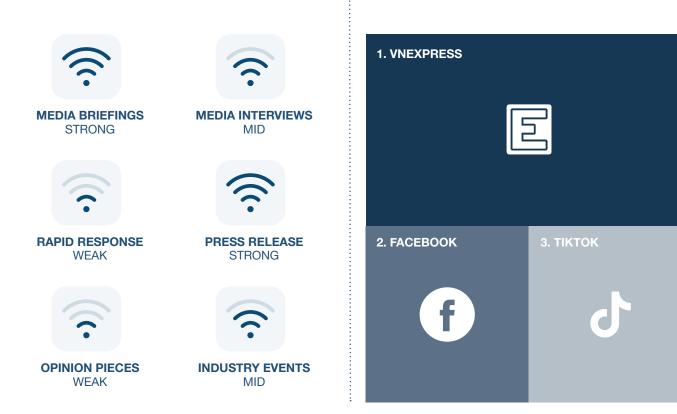
Vietnam's media landscape can be largely divided into two – those based in Hanoi, Vietnam's centre for government, business and finance; and those based in Ho Chi Minh City, which attracts a more consumer/ lifestyle and international crowd. However, keep in mind that Vietnam still places great importance on relationships and personal connections. For example, media briefings and press events are common in Vietnam, but in order to maintain relationships with all key titles, it is not unusual for companies to fly press out from one respective city to the other to ensure everyone gets a fair chance, or to replicate events in both cities.

It's worth noting that all major publications in Vietnam are government-owned or affiliated, which means a close adherence to the national agenda in terms of news selection, and a focus on announcements that benefit the country and its people.

MEDIA OUTREACH IN VIETNAM

While the traditional media is still seen as an authoritative source of announcements and news, everyday Vietnamese people typically turn to popular online portals and social media networks (including Facebook) for their daily news consumption. These portals are especially important for consumer brands. That said, organisations entering Vietnam should still invest in building relationships with the traditional press in order to be seen as a credible player especially if targeting business decision makers and the authorities.

Paid content and advertorials are essential to creating pathways to earned media exposure in Vietnam, so it's important to factor this into budgets. A per diem or travel allowance for journalists participating in any form of media engagement are also considered part of the social contract. These allowances can, however, vary significantly depending on the prominence of the title – and are best left to a native representative to handle.



INFLUENTIAL DIGITAL PLATFORMS

In a world of ageing societies, Vietnam is young – meaning its culture is largely defined by its youth. Pop cultural influences, from K-Pop to American TV programmes to TikTok trends, hold a lot of sway when communicating with this locale. That said, Vietnam is a conservative society that adheres to a hierarchical structure (typically determined by age). Modesty, humility and keeping the peace are values of the utmost importance – and even in times of disagreement, the focus should be on resolving the issue together as opposed to pointing fingers and placing blame.

Otherwise, avoid discussions around China and communism at all costs. Though China is Vietnam's largest trading partner, the topic is extremely polarising. Meanwhile, any attempts to draw comparisons between the two peoples or nations will be met with staunch opposition. By and large, avoiding geopolitical conversations altogether is considered best practice.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Vietnam is Vietnamese Dong (VND).



South Asia

India **A Market of Volumes**

Snapping at the heels of global economic rankings, India is one of the fastest-growing markets in the world, expected to stand as the third-largest economy globally within the next 10-15 years. Indeed, in the run-up to the recent 2024 elections - the largest democratic exercise in the world - there's been a palpable focus from the government on building a digitally enabled new "Bharat" (emerging India) and fostering growth in semiconductors and the digital economy.

As the world's most populous nation, it will come as no surprise that India is hungry for success. India is well-reputed as a hatchery for startups and has minted 68 unicorns as of 2023. That said, given its immense scale, regulatory and physical infrastructure continue to present challenges for organisations looking to set a base in the market.

The government aims to replicate the success of Bengaluru, often referred to as India's Silicon Valley, which serves as the regional headquarters for some of the world's largest IT and finance companies. This points to the larger trend of the government actively promoting transformation of tier two cities into hyphen self sustained economic hubs to distribute job opportunities and wealth. While Delhi, Mumbai and Bangalore remain the traditional economic powerhouses, recent years have seen the rise of cities including Hyderabad, Pune as well as the establishment of semiconductor hubs in locations such as Dholera and Sanand.

KEY SECTORS IN INDIA



With an estimated 100,000 publications and 380 television channels, suffice to say India's media landscape is densely populated. There is, quite literally, a title covering every imaginable vertical – as well as an accompanying app – and it's not uncommon for a basic press release distribution to result in hundreds of results, bucking the otherwise downward trend in surrounding markets. This includes a thriving regional media scene catering to India's many local languages.

Keep in mind, however, that the volume is not representative of ownership, which is far more concentrated and often, government aligned. Although India's media landscape has historically been characterised by its pursuit of truth and accountability, recent shifts have led to a noticeable change in tone and coverage. A final point of note in recent months has been the launch of a new and highly affordable broadband service – Jio – which enrolled over 100 million subscribers within its first three months of operations alone. Millions of previously unreachable Indians are now able to access news – whether real or fake. Indeed, 'WhatsApp University' is a real challenge in the market as unverified headlines make the rounds, so it's vital that organisations remain in control of their narratives during media outreach.

MEDIA OUTREACH IN INDIA



MEDIA BRIEFINGS STRONG



RAPID RESPONSE WEAK



OPINION PIECES WEAK



MEDIA INTERVIEWS MID

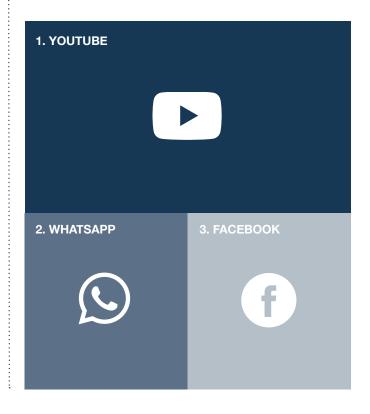


PRESS RELEASE STRONG



INDUSTRY EVENTS MID





Home to several hundred languages, thousands of ethnic groups, as well as having every major religion represented, India is diverse to the core. With that in mind, India requires a nuanced approach to communications to avoid unintended offense. Understanding the intricate tapestry of traditions and beliefs demands heightened sensitivity to the varied perspectives within the country.

India is otherwise characterised by its propensity for escalation. It is not unusual for Indians to be quick to critique, so it's important for organisations to develop a filter as to what is a minor grievance versus what is key market feedback. Embracing this complexity is essential to navigating the multifaceted dimensions of India's cultural, social and economic spheres.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



Sri Lanka **P** Tea Leaves and High Seas

After facing a severe financial crisis in 2022, and an era of widespread reforms and restructuring, Sri Lanka's economy is beginning to show signs of a strong recovery, with projections for 2024 suggesting full-year growth of between 1-2%.

Tourism and agriculture remain stalwarts of the Sri Lankan economy – but during this time of transition and economic transformation, Sri Lanka has also emerged as a strategic maritime and aviation hub, capitalising on its position within the Indian Ocean. Other areas of economic interest include renewable energy, apparel & textiles, pharmaceuticals and auto components.

KEY SECTORS IN SRI LANKA



Sri Lanka is a nation where media censorship is prevalent, and state-owned media entities hold significant influence, and most owners of major media have clear political affiliations. The landscape of print media is particularly noteworthy, as the four largest proprietors collectively command three-quarters of the country's readership.

Despite the dominance of traditional media, there is a discernible shift in dynamics as new media grows. Social media platforms such as X and WhatsApp are emerging as popular sources for current affairs, while LinkedIn gains prominence in the realm of businessto-business (B2B) communication. There are over 7 million active social media users across the country, and over 14 million internet users. The hospitable nature of the media landscape in Sri Lanka underscores the importance of fostering connections and remaining attuned to the evolving needs of the audience. But it's worth noting that in this media environment, financial considerations also play a pivotal role, with paid content holding considerable value.

MEDIA OUTREACH IN SRI LANKA



MEDIA BRIEFINGS STRONG



RAPID RESPONSE STRONG



OPINION PIECES MID \bigcirc

MEDIA INTERVIEWS STRONG

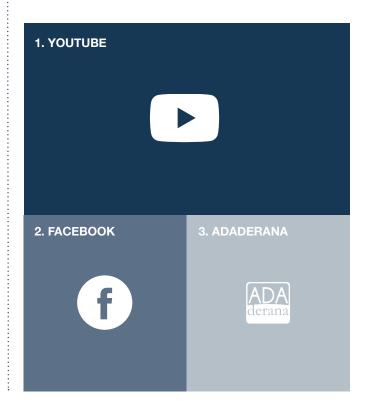


PRESS RELEASE STRONG



INDUSTRY EVENTS MID





Sri Lanka is home to numerous ethnic groups, languages and religions – but the dominant population are the Singhalese and Buddhist community. Buddhism holds a significant influence in Sri Lanka, shaping the cultural fabric of the nation. The adherence to Buddhist values and beliefs is deeply ingrained in society – and anything that could be construed as criticism of the Buddhist religion or clergy should be avoided at all costs.

In this diverse cultural landscape, expressions of goodwill also take on special significance. Sending greetings and media gifts during key celebrations such as Sinhala and Tamil New Year, as well as Vesak, is not merely a social norm but is considered a genuinely kind gesture. Thoughtful acknowledgment of journalists' birthdays is also appreciated. A unique way to convey these sentiments is through carefully curated gifts. Food hampers featuring traditional delights like kavum, kokis, and athirasa sweets elegantly arranged in a coconut leaf basket provide a taste of Sri Lanka's rich culinary heritage.



Money Matters

All figures are in USD, approximate and subject to variation according to industry sector, complexity of requirements and expected outcomes.



The local currency in Sri Lanka is Sri Lankan Rupee (LKR).

Acknowledgements

We thank the following organisations for their contributions in developing this primer.

PRCA APAC Industry Education Group

Caroline Hsu Chief Global Officer, The Hoffman Agency and Co-Chair, PRCA APAC

Isabelle Demaude Director, International Communications, The Hoffman Agency

Ong Hock Chuan Managing Partner, Maverick Indonesia **Thanzyl Thajudeen** Founder and Senior Consultant, Mark and Comm

Ferdinand Bondoy Chief Executive Director, Partner and Co-Founder, ComCo Southeast Asia

Design

The Hoffman Agency

Methodology

'Influential digital platforms' data provided by the Reuters Institute Digital News Report 2024 for all markets except China, Vietnam and Sri Lanka where insights were unavailable. 'Key sectors' data, as well as 'influential digital platforms' data for the remaining markets, was provided by ChatGPT and reviewed by local in-market specialists for accuracy.

Keen to see an additional market included in our next edition? Please get in touch with <u>apaccomms@prca.global</u> with your thoughts and feedback.

Copyright 2024 PRCA APAC, All Rights Reserved.

PRCA

About PRCA Asia Pacific

The PRCA was founded in London in 1969. It launched PRCA Asia Pacific in 2021, replacing PRCA Southeast Asia, which had been launched in 2018. The association's aim is to raise standards in PR and communications, providing members with industry data, facilitating the sharing of communication best pracitice, and creating networking opportinities.

apac.prca.global