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<td><strong>Author(s)</strong></td>
<td>Yeap, Soon Beng</td>
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The Practice Of Public Relations In Singapore In The Nineties:
From Press Agentry To Issues Management

By

Yeap Soon Beng
THE PRACTICE OF PUBLIC RELATIONS IN SINGAPORE IN THE NINETIES: FROM PRESS AGENCERY TO ISSUES MANAGEMENT

by

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Note:

Special thanks to the Institute of Public Relations of Singapore (IPRS) for permission in using the survey data which was collected by a local research firm.

Biodata:

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Abstract

Contemporary public relations practice in Singapore often focuses on message production as opposed to strategic counselling and issues management. This study reveals that while the trend remains true of the present state of the industry, public relations practitioners in Singapore are gradually moving away from the pre-professional activities such as press agentry and logistical work. Issues management, strategic planning and research have been identified in this study as the new niches of the public relations industry in the 1990s. In the survey, both consultancies and end-users indicated the underutilization of higher profile services ranging from investor relations to community relations to research. The need for training in these services was also highlighted in the survey. The findings suggest that the scope of public relations practice in Singapore is being redefine to meet the challenges of this decade and beyond.
THE PRACTICE OF PUBLIC RELATIONS IN SINGAPORE IN THE NINETIES: FROM PRESS AGENTRY TO ISSUES MANAGEMENT

Introduction

The practice of public relations in Singapore has been fraught with ambiguity for years. While many practitioners and clients see the profession as nothing more than press agentry, there are also those who stretch the limits of its definition to include karaoke lounge hostess and social escorts. A recent survey has found that while many of the public relations activities are still limited within the scope of press agentry, event organization and promotions, there is a growing realization among practitioners for the need to provide higher profile strategic-related activities in the 1990s.

Findings in the survey showed that the consultants, in-house public relations practitioners and the end-users are aware of the need for more training in, and greater usage of, services ranging from investor relations to community relations to research. From the survey, it is obvious that the emerging trend of public relations in Singapore in the 1990s is shifting towards what Hainsworth and Meng (1988) refers to as "issues management" (1). The authors defined issues management as that function "which seeks to identify potential or emerging issues (legislative, regulatory, political, or social) that may impact the organization, and then mobilizes and coordinates organizational resources to strategically influence the development of those issues" (Hainsworth and Meng, 1988 28).

Developments which lend support to this emerging trend of the profession in Singapore in the coming decade include the country's push for organizations to go regional, the growing affluence and consumerism in the society, the enhanced focus on organizations' political, economic, social and cultural responsibilities and the escalating emphasis on multi-faceted communication with targeted publics. By highlighting the current activities and training needs in the public relations industry, this paper provides evidence for the shifting trend in the profession and discusses the industry's future directions in Singapore's vibrant media environment.

The Public Relations Industry in Singapore: Emerging Need for Strategic Services

Public relations in Singapore is a relatively young industry. The awareness of the industry can be traced back to the efforts by the British Administration to redeem and boost its credibility to the local population following its humiliating defeat to the Japanese Imperial Army during World War II (Nair, 1986:3-4). During those early years, much of the work of the professionals went along the lines of "propagandists".
This trend in the profession continued after the country's independence in 1965 as seen in the variety of campaigns and public service messages aimed at educating the public about government policies.

As Singapore prospered into one of Asia's most vibrant economies, it attracted the multinational corporations, which in turn, were followed by their international public relations consultancies. With the growing awareness of the relevance of public relations by the business community, local agencies and in-house departments also mushroomed. At present, there are about 20 recognized public relations consultant firms (both international and local) and about 80 to 100 public relations departments in the estimated $70 to $80 million dollar industry (Tan and Soh, 1994:212). Some of the big players in the industry in Singapore include Burson-Marsteller, Denton, Young and Rubicam, Ogilvy and Mather, and Hill and Knowlton.

Until recently, most organizations, including the government, considered the usefulness of public relations as nothing more than a marketing tool (see Yeap, 1994). "Although the signs are that PR is important, there is still a tendency to write off public relations as so much packaging" (Straits Times, Sept 17, 1994). To most clients, they have a tendency to regard public relations and advertising as part of a common media package in getting their message across to the target audience. "While advertising provides total control of the message, media, format, timing and frequency, public relations provides the added believability through third person endorsement by reporters, broadcasters and others who report news and information carrying the client's messages" (Tan and Soh, 1994:214).

Besides consultancies, the in-house public relations practitioners also face problems of similar nature. "Other than the huge corporations like Singapore International Airlines, Keppel Corporation, several big banks and multinational corporations, many Singapore organizations still consider PR as a peripheral function within the management's overall operations" (Yeap, 1994:3). Most in-house public relations departments handle the production of the companies' newsletters, writing of press releases, and organising meetings and social events. When it comes to strategic-related issues, the public relations department are usually kept in the periphery and will get involved only in the implementation process - after all the major decisions have been made.

In other words, much of the practice of public relations in Singapore still falls within the confines of what is called "pre-professional" services or what Grunig and Hunt (1984:22-30) refers to as the press agentry model of public relations. According to Culbertson and Jeffers (1992:54), press agentry is concerned with seeking "to gain awareness of a client, perhaps to keep TV ratings up or turnstiles clicking". To a large extent, the public relations techniques employed by government and leading multinational corporations in
the past decade or so were confined mostly to unplanned advertising, issuing press releases, or replying to reporters' requests for certain information (2).

An obvious reason for the lack of appreciation of public relations has to do with the public's perception of the profession. While many practitioners often describe their role as both a media and management function, the clients usually regard it as more of a media, and less of a management, function. Yap (1994:3) noted that senior management still see public relations as "superficial, puffery and showmanship in nature". It is not uncommon to hear public relations people complaining that they do not get enough respect from clients or the senior management of the organization (Howard, 1992:1).

Furthermore, in Singapore, the term "public relations" is still loosely used and its meaning ranges from image making to press relations to night-club hostessing. As observed by a local media director, "when karaoke lounge hostesses also call themselves public relations officers, you know you have a big problem" (AMCB, 1994:14). It is this very vague and broad definition of the term "public relations" that have lead to the misunderstanding and misrepresentation of the profession.

However, in the 1990s, the unprecedented economic growth among the Asian countries - coupled with the rising visibility of the media industry - has serious implications for public relations people in the region. As Fortune magazine put it, "In the 1990s, globalization (and regionalization) will mature from a buzzword to a pervasive reality". In Singapore, the upbeat business climate has already contributed to the mushrooming of consultancies and in-house public relations departments. The industry is estimated to grow by 20 to 25 percent annually in the nineties (Business Times, 11 January, 1994).

For the practitioners, the changing economic global developments has brought about the realisation that their services must change with the times and therefore expand beyond just press agency and logistical work. To be more effective in the 1990s, practitioners have realised the need to be alert to emerging issues - economic, political, social and cultural - in all the markets where their clients do business and not just in the home country. And it is crucial that the practitioners remember that the major issues usually do not always surface from Singapore.

Tan and Soh (1994:212) described the public relations industry in Singapore in the 1990s as taking "a high pro-active profile, with organizations taking the initiative to draw up strategic public relations campaigns to explain issues and problems before they are raised by the public". Indeed, this is an apt description of the direction the industry is shaping towards from the pre-professional activities of the seventies and eighties.
In Singapore, evidence of this shift towards issues management can be seen in the use of public relations by the financial community to help in the public listing of companies on the stock exchange (Straits Times, Sept 17, 1994). To many of these companies, they are beginning to recognize that the real value of public relations is not just concerned with putting a pretty spin on mediocre companies or to throw a spectacular reception. Rather, public relations is being used to manage issues for a company to ensure the success of its initial public offer (IPOs) exercise. To the business people, good public relations must have two effects: it should save precious time for hurried investors, and it should build the confidence towards the company.

Besides public listing of companies, it is obvious that much more potential remains in developing further the issues management function to meet the changing media needs of the business as well as non-business sectors in Singapore. With the presence of many recently formed non-profit, non-governmental groups - concerned with issues from women to minorities to health - in the Singapore society, the public relations practitioners have their work cut out in this decade. The other areas related to issues management such as environment scanning, research, evaluation, prioritizing and strategy development remains untapped (see Ramsey, 1993). Henceforth, the public relations industry in Singapore in the 1990s is slowly maturing from an ambiguously defined profession to one that is more specific, strategic and credible. This paper, with the findings from the survey, will not only identify the existing trend but also provide an insight into the growing demand for issues management in the public relations industry in the 1990s.

Methodology

A total of 800 survey questionnaires were mailed to a sample population comprising public relations practitioners and those involved in public relations-related professions. The population was divided into two sub-groups, the agency group, and the end-users group. By end-users, this study refers to client companies as well as government bodies that make use of public relations services. The sample also included several advertising agencies as they operate as one-stop media centers which not only provide public relations services but also other media-related activities such as printing, design and multi-media facilities. The advertising agencies were categorized under the agency group. The research objectives of the survey were:

* to identify the types of public relations services widely used and the trend of their use
* to identify the perceived training needs
* to obtain estimates of expenditure range by activities
* to identify the problems facing the public relations industry
The survey, conducted by a research company commissioned by the Institute of Public Relations of Singapore (IPRS), was carried out between the months of July and September 1993. Owing to the poor response from the agency group, reminders were sent out to the parties concerned and the deadline was extended to December 1993. The final breakdown from the sample was 23 for agency group and 67 for end-users group, giving a response rate of about 11 percent. The private sector companies (end-users group) dominated the sample with 46% of the total base with a slight 'skew' (+6%) to public listed companies. The second largest respondents in the sample profile were the government statutory bodies (end-users group) comprising 30%. The agency group made up the rest of the respondents (24%) and they were evenly divided between public relations and advertising companies (Figure 1). Among the questionnaires that were returned, there were several which were incomplete or ineligible.

(Insert FIGURE 1)

Two set of questionnaires were prepared and sent out to the agency and end-users groups respectively. The contents for both questionnaires were similar except that for the end-users group, there was an extra set of questions on whether they know of the types of public relations activities available in Singapore, whether these activities were handled completely or partially by consultancies, and the extent in which the clients are involved. The common questionnaire requested the respondents to identify, among a list of 14 activities, what they consider as growing in importance in terms of revenue contributions (for agency group), or expenditure spending (for end-users group), if the activities were insufficiently used, and where training was needed. Respondents were also asked for the amount of revenue earned and expenditure incurred for each of the 14 activities respectively between 1992 and 1993. Besides the 14 identified activities, there was also a "other" category in the questionnaire for any additional activity not mentioned. The 14 activities were derived following several discussions between public relations practitioners in IPRS and the research firm. The final section of the questionnaire comprised an open-ended question about the pressing problems facing the profession in Singapore.

Findings and Observations

Owing to the small number of respondents in the agency group, percentage breakdown for each of the 14 activities listed in the questionnaire was done only for the end-users group as they represent the largest number who responded to the survey. For the agency group, percentage breakdown was avoided as the figures could lead to inaccurate representations and interpretations. Instead, the actual number of respondents in relation to the base total (23) for the agency group was used.
From the responses to the question on activities growing in importance, based on revenue earned or expenditure incurred for both agency and end-users groups respectively, event organization, media buying, and print production were ranked tops. For the public relations consultancy, demand for these activities grew by more than half compared to the other activities ranging from investor and government relations to training and research (Figure 2). If the activities of advertising agencies were included, it is interesting to note that media buying was ranked highest, followed by print production and event organization. Activities which require some degree of strategic planning and issues management such as community, employee, or government relations and research were ranked very much lower (Figure 3). None of the respondents in agency group identified activities such as issues management, strategic planning, environment scanning, and/or management by objectives in the "other" category.

(Insert FIGURE 2)

(Insert FIGURE 3)

End-users group identified print production (77 percent) as the activity which grew the most in terms of their revenue spending. The advertising-related functions - media buying and creative production (65 percent and 58 percent respectively) - were ranked the next most important while less than half of the responses indicated public relations activities such as event organization, holding seminars/conferences, and media, community, employee, investor or government relations as growing in importance (Figure 4).

(Insert FIGURE 4)

From the findings, it is possible to deduce that at the present time, end-users still have a preference for advertising than public relations. Their appreciation of public relations is also limited to the logistical work and press agentry functions such as event organization, media relations and promotions. This understanding of public relations coincides with the activities identified by public relations consultancies as their main income earners (event organisation and media relations).

However, if we examined the responses to the questions on the activities insufficiently used and activities where training is needed, it can be seen that there is a growing demand for activities related to some degree of expertise and/or strategic planning - community relations, investor relations, employee relations, surveys, and audio-production skills. Both the agency and end-users groups were in agreement in these two categories, thus providing an indication as to the direction in which the public relations industry is expected to develop towards.
For the public relations consultancies, about 50 percent indicated that community relations, surveys (or research), government relations and training were underutilized (Figure 5). Among the agencies as a whole, community relations, surveys, and employee and media relations were identified as the activities insufficiently utilised by the clients (Figure 6). If the interests of the end-users group were considered, the activities they highlighted were the same as that of the agency group. These activities, which fall within the definition of issues management (strategic thinking, research, management by objectives) included community (51 percent), employee (42 percent), media (42 percent), and government relations (40 percent) as well as surveys (47 percent) (Figure 7).

(Insert FIGURE 5)

(Insert FIGURE 6)

(Insert FIGURE 7)

On the question of training needed, the end-users group identified audio/video production (60 percent), creative production (48 percent) and community relations (45 percent) as key areas (Figure 8). Media relations, employee relations, surveys and training were also ranked as important areas where training is needed compared to event organization and promotions which were ranked the lowest. The findings showed that clients want their public relations people to be equipped with skills related to specific expertise and/or strategic planning and management. This explains why, at the present moment, not many clients consult the public relations practitioners on activities related to issues management as they perceived the latter as lacking the expertise.

(Insert FIGURE 8)

For the agency group, other than promotions, the activities where training were seen as needed coincided with the demands of expertise by the end-users group. Creative production, employee relations to community to investor and media relations were ranked as equally important (Figure 9). From the survey, it is obvious that the public relations practitioners realised that they are still not providing activities which are either skill-related or requires very specific knowledge of a subject. The findings support the growing recognition by public relations practitioners of the need to move away from press agentry activities and to provide issues management functions to the clients in the 1990s.

(Insert FIGURE 9)

In terms of involvement of the end-users in the public relations activities, the survey revealed that in all the 14 items listed in the questionnaire, participation from clients was high in all of them. Most of the activities were also carried out internally by clients themselves or with some assistance from the consultancies. Among the three activities - event organization, media relations, and training - which
consultancies ranked highest in terms of growing importance, client involvement is usually more than 50 percent (Figure 10).

(Insert FIGURE 10)

As to the question on agency revenues and end-user expenditures, the responses were too minimal to be taken seriously in representing the financial earnings or spending of the industry. Like the consultancies, many of the end-users who responded to the survey were reluctant to disclose their financial figures despite assurances of confidentiality by both the researchers and the IPRS. This secretive posture of the respondents reflect the existing keen competition as well as the lack of trust and spirit of camaraderie in the industry.

Even among the few consultancies that responded, figures given were mainly on media buying, while activities such as investor relations, government relations, community relations, employee relations, training, and surveys were left blank. A possible reason for this could be that the consultancies which responded did not provide the latter activities to clients. One general observation which can be made from the few responses is that revenues obtained from all activities were higher for 1993 than for 1992. Like the consultancies, for those end-users who responded to this question, media buying also takes up the largest share of their expenditure. About 18 percent of the end-users reported spending more than $500,000 on this activity compared to 16 percent in 1992. For most of the other activities, the spending did not exceed $25,000 per annum.

Discussion

It is obvious from the survey that there is a growing awareness in the public relations industry in Singapore to provide services that meet the strategic needs of the clients in the 1990s. The study found that there were different degrees of awareness, attitude, perception and usage of issues management by public relations practitioners and clients. Findings also showed that the clients tend to be much more conscious than the practitioners of the need for issues management activities.

A possible explanation for this is not because the practitioners are unaware of the changing needs of their clients but because many lack the expertise demanded. As indicated in the findings on the question of training, the practitioners recognized the need to acquire the necessary analytical skills to gain an insight into the client's social, political and economic contexts. As noted by managing director of Ogilvy and Mather Singapore, Christopher Sorek, "Businesses are no longer looking for straight media relations or just media monitoring, that's not what PR is about" (Peak, 1993:53).
In general, the findings revealed that this shift towards issues management activities by practitioners in Singapore is still in its infancy stage. For those public relations firms moving towards this new niche, the focus is still on issues which are "ready for decision" and where organizational public response is crucial (see Chase and Jones, 1979). As such, the awareness and use of the issues management functions of public relations are still confined to the needs of a very specialized clientele.

The findings, however, confirmed that at present, press agentry and logistic work still occupy much of the time of the public relations practitioners (as seen in the growing importance of activities like event organisation, promotions and media relations). As suggested by the survey findings, for many of the public relations outfits, the placement of stories about a client in the press is often than not the main goal (3). While the number of consultancies, in-house departments and public relations-related personnel are on the increase yearly, many continue to concentrate on these activities as they are important income generators. Issues management activities remain relatively new although it rapidly gaining acceptance in the marketplace.

The survey also suggests that public relations is still seen as simply a function for product publicity or market/advertising support. Advertising is still the better known profession compared to public relations. While the two media industries should support each other's activities through the implementation of persuasive techniques, the preference is still for advertising. The "quick-gratification" media mindset or the desire for quick results such as higher sales figures immediately after a media event prevails in the Singapore marketplace. Operating in such a business environment, most public relations practitioners - in order to compete with the advertising people - will try to accommodate the clients' requests. Grunig and Hunt (1984:37-41) refers to the strategy for immediate results as two-way asymmetric public relations - an approach where the emphasis is often on ensuring image visibility for the client/product through rather simple "overt payoff behaviours" such as an impulse purchase or a vote on some candidate or issue about which the audience knows little.

The present state of the public relations industry is not surprising as it merely indicates that the industry is in a state of transition from pre-professional services to higher profile activities such as issues management and strategic planning. The arrival of the 1990s has certainly triggered off the awareness and demand for the latter activities in Singapore. Wakefield and Cottone (1992:69) observed that the services, which focus on obtaining publicity in the press, were typical of what US consultancies and corporations were concerned with in the 1980s. This observation shows that, other than the local cultural and social orientations influencing the handling of clients, the problems and issues confronting the development of the public relations industry in Singapore are not unique.
From the survey, it can be deduced that clients and practitioners themselves are beginning to see how public relations can be used to develop and manage issues within the larger multi-faceted context in which they operate. Public relations is now moving towards the trend of focusing on strategic counselling and issues management as opposed to message production in the earlier years. While several consultancies have already shifted their focus in providing such specialised services, they have remained relatively low profile for business reasons.

One market which has started using public relations firms for the strategic functions is the public listing of companies in the stock exchange. Describing the niche as financial public relations, the practitioners see the challenge as taking "...a company that is unknown and create a feel for it so the public can make a value judgement whether or not to buy the counter" (Straits Times, Sept 17, 1994). The inclusion of public relations practitioners in the strategic planning efforts behind the public listing of companies (or investor relations) is a strong indication of the relevancy of the profession to the business community in Singapore. To some extent, it shows that the senior management of companies are beginning to recognize the importance of public relations in building the company's profile, supporting the initial public offerings (IPOs), and following up with share holder relations.

Apart from investor relations, it is only a matter of time before the public relations industry in Singapore expands their activities to other areas related to issues management (Heath and Nelson, 1986), strategic planning (Grunig, 1988), environmental scanning and management by objectives (Nager and Allen, 1984). Culbertson and Jeffers noted that these activities are widely viewed as central to the public relations practitioners of the nineties (1992: 54). "In fact, it can be argued this type of activity distinguishes the true PR professional from the publicist or hack" (Culbertson and Jeffers, 1992:63).

While the practitioners in Singapore have realized the importance of this emerging niche, their progress in providing these services is still slow (Tan and Soh, 1994:215). This is because many practitioners, as indicated in the survey, do not have the expertise and training in the specialised areas. As shown in the findings, both the practitioners and clients recognized the need to acquire expertise in activities such as community relations, employee relations and survey.

Furthermore, in Singapore, many of the public relations practitioners in the industry started their media career as press people or advertising staff. As such, when they joined the public relations industry, their expertise is rather limited to simply writing skills or marketing. What is needed to meet the demands of the public relations industry in the 1990s is the availability of educational and training courses on issues management activities. Recognizing the present educational void in the industry in this area, the IPRS has started a three-month certificate course on Principles and Practice of Public Relations which focuses
on issues management. The institute also offers a Masters degree programme in public relations with the University of Stirling in Scotland through distance education. It is only with the suitable educational and training background that the practice of public relations can be raised to an acceptable level of professionalism.

Research is also another component that the practitioners need to introduce as an activity to their clients in the 1990s. Culbertson and Jeffers (1992:54) noted that "what separates the more sophisticated PR firms from those offering press agentry is (the) research component". The research component is necessary as it takes into account the social, political and economic contexts affecting the client or organization.

The research component is important as it allows practitioners to understand what affects the "image" of their clients and how it is likely to bear on audience behaviour. In order for the practitioners to conduct the necessary research to understand a client's social, political and economic contexts, they must have good analytical skills and a broad knowledge of subjects and issues. This "contextual" thinking is crucial as it is seldom that the structure of today's business problem is so simple and straightforward. This is especially true for today's global organizations, which include many Singapore companies, as they operate in a borderless business environment.

Conclusion

From this study one may conclude that the Singapore public relations industry in the 1990s is gradually moving towards a more professional status. Both the practitioners and the clients generally recognized the strong need for specialized skills and knowledge, to provide strategic planning, and issue-oriented communication. This realization is linked, to some degree, to the country's strong economic growth and expanding financial community. To facilitate this vibrant business landscape in the country and in the region, practitioners must take the initiative to provide more strategic-oriented media services to the clients. This changing role of public relations practice in Singapore is well reflected in the findings of the survey which supports the profession's gradual shift from simple message production to training, issues development and strategic planning.

The study noted that, while the awareness of issues management is increasing among the practitioners and their clients, the shift towards providing these services remain slow. For the moment, the public relations practices are still responsive rather than proactive in nature. Much work is still focused on press agentry and event organization. There are many practitioners who may be trained in communication skills but lack the management expertise and often concentrate on the "how" and not the "why".
While the survey findings in this study are useful in providing an insight into the emerging practices in the public relations industry in the 1990s, there are some limitations. The response rate to the mail survey was relatively poor and there was a lack of openness among the respondents in sharing profession-related information. As such, the findings in this survey are by no means conclusive. What is proposed here is that more issues management-based studies should be done to help define, identify and further crystallize future needs of the industry. Studies should also look at the degree of awareness among practitioners about issues management, the degree in which they are involved in providing this strategically-oriented services, the training needed to facilitate issues management activities, and the changing demands of the national and international marketplace. In order to effectively serve practitioners and their clients, public relations education and research are important strategies that must be adopted and adapted accordingly.
Footnotes

1. The concept of issues management has been discussed for more than 10 years but there is a lack of consensus on a specific definition. The original definition of issues management was by Howard Chase and his associate Barrie Jones who coined the term in 1977. For them, the term issues management referred to "a management philosophy with an ongoing systems process to help executives identify, analyze and manage public policy issues in a populist society experiencing discontinuous change" (1977:21).

2. Even in the issue oriented matter like the public listing of a company, the perception of role of public relations by companies is limited to organizing the mandatory press and analyst conferences, writing the speeches, prepare the video and exhibition, invite appropriate people and taking care of the cocktail reception (Straits Times, Sept 17, 1994)

3. An obvious explanation for the present emphasis on press agentry trend by public relations firms in Singapore has to do with the overemphasis of the industry's relationship to journalism. This dependent relationship between public relations and the press is especially significant in a country like Singapore where the number of print and broadcast media channels are limited.

4. The number of listing doubled from 10 in 1991 to 20 last year and for this year, there are already 24. The major players specialising in initial public offers are iMAGE (a Singaporean-owned firm which has handled half the initial IPOs made by Singapore companies in the past year), Burson Marsteller and Ogilvy and Mather (Straits Times, Sept 17, 1994).

5. Grunig and Hunt (1984:30-37) refer to this approach as the public information and two-way symmetric models of PR which require practitioners to consider a client's social, political and economic context in order to identify needs of the client's publics; evaluate organizational outputs; and interpret probable future growth, decline or change of needs and outputs. By doing so, the public relations practitioner is able to provide the client with a comprehensive media strategy, one that considers the impact on the organization's (or client's) contextual variables as well as image (Culbertson and Jeffers, 1992:63)
Bibliography


Newspapers

The Straits Times, Singapore
The Business Times, Singapore
FIGURE 2

ACTIVITIES - GROWING IMPORTANCE ($) (AMONG PUBLIC RELATIONS CO.)

Event organisation: 7
Media relations: 6
Training: 6
Print Production: 5
Conferences/seminars/exhibitions: 5
Audio/video production: 4
Community relations: 4
Employee Relations: 4
Investor relations: 4
Advertising - media buying: 3
Promotions: 3
Surveys: 3
Government relations: 3
Advertising - creative production: 2

SOURCE: Q2a
BASE: ALL PUBLIC RELATIONS CO. (12)
[MULTIPLE RESPONSES]
FIGURE 3

ACTIVITIES - GROWING IN IMPORTANCE ($)
(AMONG ALL AGENCIES)

Advertising - media buying: 14
Print Production: 14
Event organisation: 14
Promotions: 10
Advertising - creative production: 9
Audio/video production: 9
Media relations: 9
Surveys: 7
Training: 7
Community relations: 6
Conferences/seminars/exhibitions: 6
Investor relations: 6
Government relations: 5
Employee Relations: 5
Others: 1

SOURCE: Q2a
BASE: ALL AGENCIES (23)
[MULTIPLE RESPONSES]
FIGURE 4

ACTIVITIES - GROWING IN IMPORTANCE ($)
(AMONG ALL USERS)

Print Production: 77%
Advertising - media buying: 65%
Advertising - creative production: 58%
Event Organisation: 53%
Media relations: 53%
Promotions: 50%
Community relations: 49%
Employee relations: 46%
Audio/video production: 44%
Conferences/seminars/exhibitions: 42%
Surveys: 27%
Training: 27%
Government relations: 21%
Investor Relations: 21%
Other: 2%

SOURCE: Q2a
BASE: ALL USERS (67)
[MULTIPLE RESPONSES]
Figure 5

ACTIVITIES - INSUFFICIENTLY USED
(AMONG PUBLIC RELATIONS CO.)

- Community relations: 7
- Surveys: 5
- Government relations: 5
- Training: 4
- Print Productions: 3
- Audio/video production: 3
- Promotions: 3
- Employee relations: 3
- Media relations: 2
- Investor Relations: 2
- Advertising - media buying: 2
- Event organisation: 1
- Conference/seminars/exhibitions: 1
- Advertising - creative production: 1
- Others: 1

SOURCE: Q2a
BASE: ALL PUBLIC RELATIONS COS (12)
[MULTIPLE RESPONSES]
FIGURE 6

ACTIVITIES - INSUFFICIENTLY USED
(AMONG ALL AGENCIES)

Community relations: 12
Surveys: 10
Media relations: 8
Event organisation: 7
Promotions: 7
Government relations: 7
Training: 7
Conferences/seminars/exhibitions: 5
Investor Relations: 5
Employee relations: 5
Print Production: 5
Audio/video production: 5
Advertising - creative production: 4
Advertising - media buying: 4
Others: 1

SOURCE: Q2a
BASE: ALL AGENCIES (23)
[MULTIPLE RESPONSES]
FIGURE 7

ACTIVITIES - INSUFFICIENTLY USED
(AMONG ALL USERS)

<table>
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</tr>
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<td>Employee relations</td>
<td>42%</td>
</tr>
<tr>
<td>Media relations</td>
<td>42%</td>
</tr>
<tr>
<td>Government relations</td>
<td>40%</td>
</tr>
<tr>
<td>Audio/video production</td>
<td>37%</td>
</tr>
<tr>
<td>Training</td>
<td>30%</td>
</tr>
<tr>
<td>Conferences/seminars/exhibitions</td>
<td>28%</td>
</tr>
<tr>
<td>Investor Relations</td>
<td>28%</td>
</tr>
<tr>
<td>Event organisation</td>
<td>26%</td>
</tr>
<tr>
<td>Promotions</td>
<td>26%</td>
</tr>
<tr>
<td>Advertising creative production</td>
<td>25%</td>
</tr>
<tr>
<td>Advertising media buying</td>
<td>16%</td>
</tr>
<tr>
<td>Print Production</td>
<td>16%</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
</tr>
</tbody>
</table>

SOURCE: Q2a
BASE: ALL USERS (67)
[MULTIPLE RESPONSES]
FIGURE 8

ACTIVITIES - TRAINING NEEDED
(AMONG ALL USERS)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio/video production</td>
<td>60%</td>
</tr>
<tr>
<td>Advertising - creative production</td>
<td>48%</td>
</tr>
<tr>
<td>Community relations</td>
<td>45%</td>
</tr>
<tr>
<td>Media relations</td>
<td>40%</td>
</tr>
<tr>
<td>Advertising - media buying</td>
<td>38%</td>
</tr>
<tr>
<td>Employee relations</td>
<td>35%</td>
</tr>
<tr>
<td>Print Production</td>
<td>35%</td>
</tr>
<tr>
<td>Surveys</td>
<td>30%</td>
</tr>
<tr>
<td>Investor Relations</td>
<td>30%</td>
</tr>
<tr>
<td>Government relations</td>
<td>28%</td>
</tr>
<tr>
<td>Training</td>
<td>28%</td>
</tr>
<tr>
<td>Conferences/seminars/exhibitions</td>
<td>27%</td>
</tr>
<tr>
<td>Promotions</td>
<td>25%</td>
</tr>
<tr>
<td>Event organisation</td>
<td>23%</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
</tr>
</tbody>
</table>

SOURCE: Q2a
BASE: ALL USERS (67)
[MULTIPLE RESPONSES]
FIGURE 9

ACTIVITIES - TRAINING NEEDED
(AMONG PUBLIC RELATIONS CO.)

Investor Relations — 4
Event organisation — 2
Promotions — 2
Advertising — 1
Employee relations — 1
Media relations — 1
Community relations — 1
Surveys — 1
Government relations — 1
Audio/video production — 1
Print Production — 1
Training — 0
Advertising — 0
Conferences/seminars/exhibitions — 0

SOURCE: Q2a
BASE: ALL PUBLIC RELATIONS CO. (12)
[MULTIPLE RESPONSES]
FIGURE 10

ACTIVITIES - DONE (END-USERS)

EVENT ORGANISATION

BASE: ALL USERS WHO CLAIM THAT EVENT ORGANISATION IS DONE IN SINGAPORE (58)

TRAINING

BASE: ALL USERS WHO CLAIM THAT TRAINING IS DONE IN SINGAPORE (40)
BASE: ALL USERS WHO CLAIM THAT MEDIA RELATIONS IS DONE IN SINGAPORE (59)