



## ACNielsen | DeltaQual

### When familiarity rules, the price of consumer 'auto

Revolutionary new ACNielsen research technique to provide understanding of consumer

Half of how we differentiate between the brands we choose is based purely and simply on 'familiarity' or habit (*Do I know it? Have I used it before?*), rather than on specific product knowledge or imagery, according to a recent ACNielsen analysis of global Winning Brands\* data based on studies of over 3000 brands and across a wide range of categories.

"Consumers hold the names of thousands of brands in their heads but waste little time thinking about them. Instead, they evolve a simple set of rules to help them navigate through their world of brands, and proceed to shop pretty much on auto-pilot," said Kristine Layug, Director for ACNielsen | Qualitative.

"Basic familiarity, or habit, appears to be hugely important to a consumer's brand discrimination, over and above specific brand knowledge," added Ms Layug. "Marketers who understand the programming underpinning this kind of consumer 'auto-pilot', and can identify the occasions when their consumers are most open to 'kicking' their habits, can reap huge advantages in building brand equity."

To better understand the mental rules underlying auto-pilot shopping, and the specific actions or events that might alter habits, ACNielsen has developed, ACNielsen | DeltaQual, a revolutionary new qualitative research technique currently being launched across the Asia Pacific region.

"DeltaQual is a completely new approach to understanding consumer behaviour. Most qualitative research focus on consumer feelings towards brands and their needs in the category, which is useful in executional development but less helpful in developing precise marketing strategies. However, DeltaQual starts with 'what happened' and 'how did you choose', and then turns to feelings and needs to see the extent to which they drive consumer behaviour."

"Simply put, DeltaQual focuses on the interaction between *habit*, and the moment these *habits* are reassessed. DeltaQual identifies what we call 'Omega Rules' – the mental rules that explain auto pilot shopping which tend to be simple, few in number,

rather hierarchical, and can be rational or emotion-based," said Ms Layug

"For example, someone's coffee purchasing 'rules' may be first and foremost ... *'It must be mild and mellow'*.

Beyond that, *'I'll buy a brand my husband approves of'*, and... *'if I can't find the brand he likes, I'll buy a known or popular brand'* or... *'don't buy a cheap looking type – if there's more than one that meets my other criteria, I will choose one that I know my friends like'*.

"DeltaQual aims to understand these mental combinations or rule sets to get beyond 'why' consumers prefer a brand, to how they arrived at their preferred choice, and how entrenched this choice is. These rules are usually the result of a unique personal chemistry – a combination of personality, current relationships, product requirements and social context."

"The key for marketers is that these *Omega Rules* may eventually get broken, or challenged, or simply wear out because as humans, we all desire change – and being there to exploit the moment these habits are reconsidered or challenged is critical," added Ms Layug.

However, ACNielsen | DeltaQual does not stop at establishing *Omega Rules*. It also identifies *Delta Moments*, or moments when habits are reassessed, and a consumer is most open to brand re-evaluation.

"Omega Rules are hard to access and describe, while Delta Moments are often fleeting and quickly forgotten. Yet opportunities to influence people to change their habits may be more numerous and subtle than we realise. Finding just one *Delta Moment* that represents an unrealised opportunity to increase brand switching could bring major financial benefits to a marketer," commented Ms Layug.



# Synovate Healthcare names new AP regional director

**SINGAPORE** - Synovate Healthcare has announced the appointment of Stuart Bartlett as Regional Director for Asia Pacific.

Bartlett has been involved in healthcare market research for many years. As a graduate of Isis Research in London, he spent four years specialising in sales force effectiveness and ad-hoc research. In 2001 he moved with Isis to head up their Hong Kong office. Two years later Bartlett joined Synovate as director of the healthcare division. He is currently based in Singapore.

In his new role, Bartlett will be overseeing the integration of Isis Research and Synovate Healthcare in Asia Pacific. Isis Research was acquired by Synovate in October 2003 and will rebrand as Synovate Healthcare this October.

"The combination of Isis and Synovate Healthcare has given us a leading position in the region, both in terms of network and inherent healthcare expertise," says Michael Spedding, CEO of Synovate Healthcare. "Stuart's strong knowledge of both organisations is invaluable in ensuring that the integration process is successful."

## ***About Synovate Healthcare***

Synovate Healthcare is a specialist division of global research firm Synovate. It provides some of the world's largest pharmaceutical companies with syndicated and custom healthcare research including the world's first truly aligned global cancer audit. Synovate Healthcare has offices throughout the United States, Europe and Asia Pacific, with a dedicated presence in Japan.

## ***Synovate sharpens focus on regional business in Asia Pacific***



**HONG KONG, June 8, 2004** - Global market research firm Synovate today announced the appointment of Audrey Tan to the new role of Executive Director - International Research.



Tim Balbirnie, Chief Executive Office of Asia Pacific for Synovate, said the move recognises the increasing demand for multi-country research projects across Asia and beyond. "With the ever-growing importance of China in world markets, more and more of our multinational clients are placing emphasis on research across this region. We have sharpened our focus on our regional clients by creating this role to meet their needs. Indeed, these projects necessitate a very close client-agency working relationship."

"Audrey's role will be to develop new regional business and to work closely with these clients the whole way through the research process. She will be very hands-on. The new role speaks to Audrey's talents as she has already been instrumental in managing major regional projects over the last 15 years," he said.

Ms Tan is currently the Managing Director of Synovate's Singapore office. She will take up her Hong Kong-based role on 1 May 2004 and will report directly to Mr Balbirnie.



Mr Balbirnie said the Singapore office would now be managed by Peter Snell, the Chairman of Synovate in Asia Pacific.

"Singapore is a vital market for Synovate - a regional hub with global significance. We are very fortunate to have Peter Snell already in Singapore. He will become more involved with the overall management of the Singapore office, ably assisted by the excellent senior management team already in place," Mr Balbirnie said.

## ***About Synovate***

Synovate is a top global research company, operating in 46 countries and employing more than 3,300 people. The company generates consumer insights that drive competitive marketing solutions and provides a broad range of market intelligence services - using powerful and established methodologies, as well as innovative and tailored solutions. For more information on Synovate visit [www.synovate.com](http://www.synovate.com)



## Promotions

Research International Singapore is pleased to announce the promotion of the following personnel with effect from May 2004.

**Serene Wong, Managing Director of Research International Singapore, has this to say of their recent promotions, "These are proud moments for Research International as we recognize these individuals for their passion and clever thinking and their strive for high quality work. They have indeed contributed significantly to the healthy growth of RI."**



**Sunando Das**  
*Research Director, Research International, Singapore*

**Sunando** has key responsibilities for Marketing Science in South-East Asia, managing all product and technical related research issues – involving modeling, sales support and training on RI brands and advanced methodologies.

He has a key role in client servicing, with a mix of FMCG, B2B, Telecom and Service sector clients across a gamut of areas namely segmentation, consumer understanding, branding, pricing, customer satisfaction and loyalty management; including multi-country studies across Asia Pacific and emerging markets in Middle-East and Europe.

Sunando brings with him knowledge of various research techniques and methodologies and their applications to make research more insightful for clients. He has presented papers in market research conferences (ESOMAR) in the area of segmentation, brand positioning / portfolio management and pricing strategies.



**Nichole Gu**  
*Research Director, Research International, Singapore*

**Nichole** graduated from Fu-Dan University, Shanghai after which she spent 6+ years with RI China Shanghai office. Nichole joined RI Singapore in 2001.

In her 10 years career of market research, Nichole has worked with many multinational clients and her research expertise is mainly in the area of Consumer Understanding and Innovation (New Product Development from idea generation to concept/product tests and volumetric). In particular, the type of research she has been actively involved in includes usage & attitude, market segmentation, brand positioning, concept & product testing and volume estimation. Over the past 2 years, she was also heavily involved in customer satisfaction and brand health tracking studies.

In the regional arena, Nichole has built valuable experience in large scale multi-country projects spanning across FMCG and service sectors, such as telecommunications & international courier services.



**Griffin, Craig**  
*Associate Director, Research International, Singapore*

**Craig** has over ten years experience in professional services, including seven years experience working for leading market research agencies and consultancies in the UK, Australia and now Singapore. He has a sound knowledge of all major research techniques (qualitative and quantitative) and has a passion for the application of market research within the broader context of marketing and corporate strategy. His expertise spans across a wide range of industries, with particular emphasis on financial services, retail and other service industries, but also FMCG and IT/telecoms.

He is also a key driver for the latest thinking in customer and employee relations and implementing current best practice and thinking in the industry.

# MRSS Breakfast Talk in June 2004



The MRSS breakfast talk was held at the InterContinental hotel on Thursday 24<sup>th</sup> June.

The guest speaker on this particular occasion was Cancy Tan of International Flavours & Fragrances. Cancy, who has 22 years experience in the research business, (having worked both in the industry as well as on the client side), felt fully qualified to impart some of her learning accumulated over the years particularly, in the area of research methodology.

Cancy's talk was entitled "*Methodology Pitfalls – 10 case studies*". Cases were varied and included studies featuring spectacular blunders in sampling, flawed questionnaire designs, misleading logistics and fundamental misdiagnoses. Her examples covered everything from high tech product testing to half head sniff tests for shampoo.

Ms Tan went on to re-emphasize the importance of quality control in all research, no matter how small the scope of the project. And as promised, she left the attendees with a surfeit of food for thought.

The MRSS AGM meeting was held directly after the breakfast talk and was chaired by Chan Siew Hoong. Details of the AGM will be circulated shortly.

The next MRSS breakfast will be held in September 2004.

## "Did You Know?"

... that when no payment has been made, proposals, cost quotations and the contents of syndicated research data remain the property of the researcher. With regards to cost quotations and proposals Rule 22a of the Code of Professional Behaviour adds: *They (market research proposals and cost quotations) must not be disclosed by the Client to any third party other than a consultant working for the Client on that project (with exception of any consultant working for a competitor of the Researcher). In particular, they must not be used by the Client to influence research proposals or cost quotations from other Researchers.*

This is a new section in the quarterly NewsLetter we would like to introduce. Please send in all your interesting DYKs (whether ethical, methodology related, cultural etc.) so that we can help you share them with all other MRSS members. Please email your ideas to [enquiry@mrssingapore.org.sg](mailto:enquiry@mrssingapore.org.sg)

## An MRSS Directory on CD-Rom

It has been noticed recently that an increasing number of research organisations are being set up in Singapore. To help you notice the new players based in Singapore, keep up with the changes of existing players and also assist you in further understanding each of these players, the MRSS plans to put together an island-wide Directory whereby, each company featuring will have the opportunity to detail their own profile, areas of expertise, key contacts and contact details, MRSS members etc. Please, help us make this project a success by kindly responding to future correspondence on this matter. The completed CD-Rom will be sent out to individuals with each membership renewal each year.