
October Breakfast Talk : Learnings for Creative Advertising that sells - Dispelling some Myths about how Consumers Understand Advertising

On Oct 21, Gonzalo Fuentes and Amit Kulkarni from Millward Brown made a presentation on "Learnings for Creative Advertising that sells - dispelling some myths about how consumers understand advertising".

The presentation began with explaining the view on how consumers react to advertising and what good advertising should constitute. The presentation also touched upon the concept how a 'creative magnifier' - the core elements of the advertising that get retained in consumer memories the most. Good

advertisers use this 'creative magnifier' well to connect to their brand and to the message for maximizing on air impact.

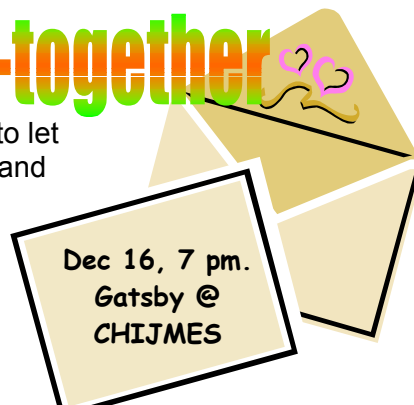
They then went on to explain the different misconceptions that exist in the ad world about research on advertising. They explained how ads typically do not 'wear-in', how testing animatics is not really such a big issue, how ads that work in one market need not necessarily work in another and how good branding does not necessarily mean having the packs shown in your ad throughout the ad.



*Breakfast Talk speakers:
Amit Kulkarni (left) and
Gonzalo Fuentes (Right) from
Millward Brown*

Christmas get-together

It's time for market researchers to let down their hair and play! Come and enjoy a social evening with other MRSS members at our annual get together. Judging from last year's party, a lot of fun is guaranteed! All MRSS members are invited!



Dec 16, 7 pm.
Gatsby @
CHIJMES

Did You Know?



....that researchers may retain information in an identified form (video and audio tapes of groups, in depths etc.) only while the details of the identity of the Respondents continue to be necessary for research purposes.

In the case of de-identified information, the period of time for which records should be kept by the Researcher normally will be longer for the stored data resulting from a survey, than for primary field records. Records should be kept in a manner in which it should be possible to reconstruct all the information originally collected with the exception of any personal identifiers. The period of which the records will be kept must be disclosed to and agreed by the Client in advance.

In default of any agreement to the contrary, in the case of ad-hoc surveys the normal period for which primary field records should be retained is one year after completion of the fieldwork while the research data should be stored for at least two years.

*Contributed by Franciose
Coirier, Research
International*

Research International's World Vision Charity Initiative

Research International Group has made a three year commitment to a World Vision project in Kenya which will enable 9 young people to continue their education to university. We are now in the second year of this support and have so far donated over US\$30,000. We make a company donation of approximately US\$10,000 at the start of each year, and match that donation in money raised by RI people throughout the world by the middle of each year.

Research International will be able to make a real difference to the lives of young people who have come through poverty and hardship. At the same time we have enjoyed raising some money and ensuring that our offices around the world make a significant contribution to this Group initiative. 'Give it up for Geoffrey' is our most successful fundraiser. Following last year's 24-hour famine fund raising campaign, to coincide with Olympics 2004, RI has come up with our very own



Research International World Vision Olympics this year.

This seems to have been an event that captured the imagination of staff around the world. The sheer scale of events taking place has been mind blowing, some of the highlights being arm wrestling, tug of war, arrow throwing (only minor injuries occurred), ant nesting (!), volley ball, boules, spring gallop, the amazing race and many more. Evidence suggests that ten pin bowling is the most popular sport at Research International. Singapore went 10 pin bowling, challenging Hong Kong to a bet, with the losing team destined to make a further contribution to World Vision. The staff had a great time and had raised a significant amount of money to the cause.

In all, we have surpassed our fundraising target of \$5000 and have already raised over \$6300 with two countries still to send their donations.

Saffron Hill Research Consumer Confidence Index, Quarter 3, 2004: Market Optimism is Riding High

SINGAPORE, 11 OCTOBER 2004: In an on-going study by Saffron Hill Research that tracks Singapore's consumer confidence, Singaporeans are more buoyant in their outlook on the economy and their own economic well-being. Whilst sentiments have been very cautious earlier this year, it appears that Singaporeans are finally seeing light at the end of the tunnel.

The Saffron Index lived up to expectations in the Q2 and grew to 58 points (up from 54 and

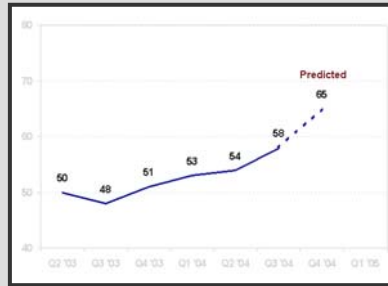
53 points in the previous two quarters). This is a staggering 10 points above Q3 last year.

The mood continues to be very optimistic as expectations are likely to push the index to 65 points for the last quarter this year. Should this happen, it will completely overshadow the 51 points recorded in Q4 last year. Compared to three months ago, almost half of Singaporeans (46%) feel that the Singapore economy has improved. This is up from 36% in Q2. Conversely, only 7% feels it has worsened, down considerably from 18% in Q2.

Of the 400 Singaporeans interviewed, 23% think their personal economic well-being has improved, up from the 18% recorded in Q2.

When asked to think of the next 3 months, 54% thinks Singapore's economy will continue to improve, with only 4% thinking otherwise. This is also boosted by 48% who feel the job market will improve.

However, Singaporeans remain cautious in their spending. Only 15% express any intention to buy durables or financial products in the next 3 months. This is down from 27% in Q2. This is primarily due to concerns with rising cost of living, which continues to be Singaporeans' main worry. About 6 in 10 are



also concerned about further increases to the GST.

"We saw quite discouraging numbers over the first half of this year as Singaporeans maintained a very cautious state of mind. Finally, we are seeing the much-needed lift in the economy that everyone has been waiting for in the sidelines. This is very clearly shown in the very positive sentiments of consumers.

The momentum is now present. Marketers need to ride on this momentum and start encouraging consumer spend to take this recovery to the next level. Now is the time to be more aggressive in advertising, marketing and promotions", says Raymond Ng, Director, Saffron Hill Research.

Asia Divided Over Bush Re-election But Certain of Failure in Iraq

According to findings announced today from a new **CNN/TIME** poll conducted by **TNS**, opinion may be polarised on whether the re-election of US President George W. Bush is a good thing for Asian countries, but when it comes to his ability to win the war in Iraq, the verdict is clear.

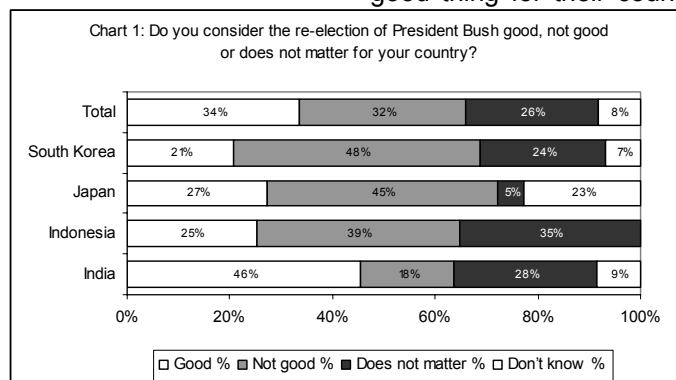
On average, just one third (34 per cent) of respondents in the four Asian countries surveyed; India, Indonesia, South Korea and Japan, believe the President's re-election is good for their country – only marginally higher than those who feel it to be a bad thing (32 per cent). Both Japan (45 per cent) and South Korea (48 per cent) expressed the strongest displeasure at the election result. Almost half of those interviewed in those two countries believe that Bush's re-election is not good for their

country. This was echoed in Indonesia where 39 per cent of respondents in the world's largest Muslim country said a second term for Bush was not a good thing for their country.

This is in marked contrast to India, the only country of the four in which the election result was seen as beneficial by the majority of respondents. Recording the highest overall percentage of people that saw the re-election of President Bush to be a good thing for their country (46 per cent), India's belief in the Presidency was almost double that of South Korea, Indonesia and Japan where numbers of respondents feeling the re-election to be a good thing for their country were 21 per cent,

25 per cent and 27 per cent respectively.

When asked whether President Bush can win the war and bring stability to Iraq in the coming four years, the answer from the same group of countries



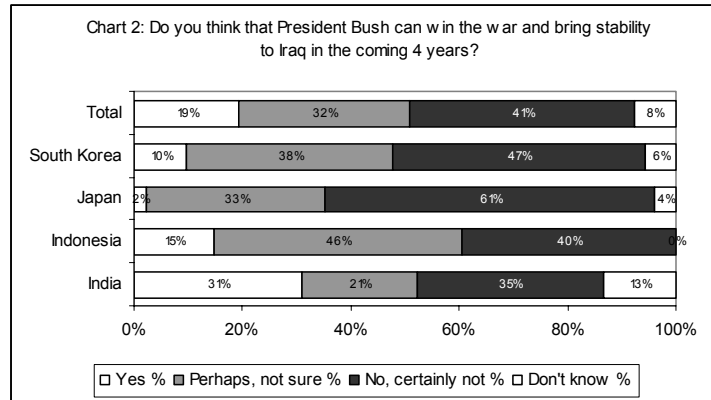
was a resounding, “no, certainly not.

Twice as many respondents (41 per cent on average) across the four countries expressed the firm belief that Bush would not be able to win the war, compared to 19 per cent who felt he could. In Japan, which has troops currently stationed in the Middle East and has suffered casualties as a

result, only 2 per cent of those surveyed agreed, and about 60 per cent said he could not win the war. Similarly, in South Korea almost half of all respondents (47 per cent) expressed the opinion that Bush could not win the war.

In Indonesia, only a quarter considered Bush’s re-election to be a good thing for their country, and only 15 per cent believe that the President

could improve the situation in Iraq. As many as 40 per cent said he could definitely not bring peace or stability. In more upbeat India, opinion was more evenly split between those agreeing that Bush could win the war and bring stability to Iraq (31 per cent) and those who did not (35 per cent).



This CNN/TIME poll was conducted from Nov 5th to Nov 10th, 2004

by TNS, using face to face (India, Indonesia), telephone (Korea) and online (Japan) interviews. Fieldwork in Japan and Korea was conducted nation-wide, in India in Delhi, Mumbai, Chennai and Kolkata, and in Indonesia in Jakarta only. The survey covers a random sample of 2,379 respondents; 1,069 adults in India, 510 in Indonesia, 500 in South Korea, and 300 in Japan.

Research International Holds First in a Series of Clients Seminars in Asia

On Tuesday 9 November Research International held the first in a series of client events across Asia Pacific. The subject, “Risk! Winning in the game of brand extensions”. The event in Singapore took place in the East India Room at The Raffles Hotel and attracted a good number of clients from a mixture of sectors and disciplines.



Julian Bond, Managing Director of Research International’s Marketing Science Centre presented alongside Sunando Das, Research Director in Singapore. The presentations were very well received and promoted lively debate and further questions for the Research International client teams that also attended.

The breakfast seminar, examined why brand extensions have become more popular than new product launches and why this is not necessarily a good idea. Research International has combined information from its branding and innovation databases to reveal fresh perspectives on why brand extensions often disappoint - and concrete recommendations to improve clients’ odds of winning.

Julian Bond says of the findings:

“Businesses are always looking for ways to increase the chances of new products succeeding, which in turn has led to an increase in brand extensions. This is largely because they appear to perform better in market research, but in reality they actually perform as badly, if not worse than completely new products in the marketplace. There is also the chance that extensions will have a negative impact on the parent brand’s sales or equity.”

Sunando Das comments:

“In Asia, while the emphasis on extensions is not as striking as the global picture, there are still more brand extensions being launched than new products. We would expect this trend to continue because as markets become saturated with new products the tendency is for extensions to take over.”

Research International will hold further events in Hong Kong, when Julian Bond will be joined by Hamish Munro, Managing Director and in Shanghai when Wenshuang Zhang, Research Director will co-present.

For more information please contact: Simon Harrop, Regional Marketing Manager, Asia Pacific: s.harrop@research-int.com.



Nielsen Media Research Reveals Latest Consumption Habits of Singapore Population

SINGAPORE, October 15, 2004: Four years on after the liberalization of the Singapore media scene, the local print media market remains highly competitive with dailies competing for readers’ attention.

According to findings from Nielsen Media Research’s 2004 Media Index survey, an increase in overall consumption pattern is seen—of local magazines readership, greater public transport utilization, increased internet penetration, and cinema going.

Print Media

Overall daily newspaper readership maintains at about 84%, according to Media Index 2004. This year sees most of the daily titles maintaining, and others increasing their readership. This is coupled with a 3% points increase in the Singapore population who read two dailies (to reach a high of 27%) and a simultaneous drop of 6% points of people who read only one daily (to 41%).

“The survey results obviously signify the growing sophistication and maturity of the readers in Singapore. The newspaper reader base we are seeing now is increasingly going for two titles for more diverse report of news

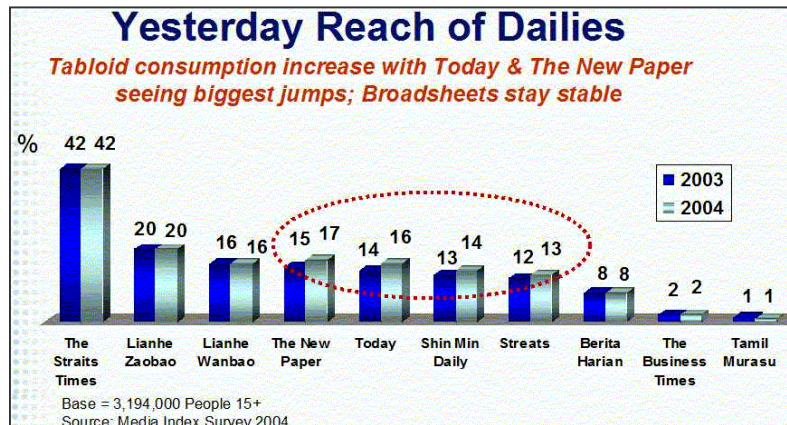
and information instead of relying on just one source. At the same time, we are seeing serious readers who are also spending more time reading across the dailies,” explained Ms Rebecca Tan, Executive Director for Nielsen Media Research Singapore.

Across the print market, readership of the staple broadsheets have largely remained stable with significant increased consumption registered for tabloid papers and the free sheets.

English dailies have generally performed well in 2004, increasing its reach by 2% points from last year to 55%. Daily broadsheet, The Straits Times, continues to be the most popular newspaper among the Singapore population, reaching out to 42% of readers. It also continued to have the highest PMEB reach, seeing a jump of 4% points in its PMEB readership to 74%. Significant growth is reported in the readership of The New Paper and the two free sheets.

Today and The New Paper were the big movers, both garnering a jump of 2% points each to 16% and 17% of the population respectively. Both papers’ rise was largely driven by an increased readership of PMEBs

and the white collared. Streets' readership has also showed a steady increase for the last three years, attracting 1% point more readers this



year to capture 13% of the population. Majority of Streets' growth can be attributed to the increased 4% PMEBs readers.

"There were 4% points more of PMEBs and 5% points more of White collar workers reading The New Paper according to the latest Media Index survey. This is probably due to the interest in their coverage of the European Cup during the second quarter of this year," stated Ms Tan.

"As for Today, in addition to reaching out to more PMEBs (+6% points) and White collar workers (+4% points), we also noted a hike of 3% points in housewife readers. Today is recording more readers reading at home—a sign that they have hit the right household distribution and editorial content formulae," Ms Tan elaborated.

Overall, Chinese newspapers retained its reach. Chinese staple Zaobao continues to lead by maintaining its reach at 20%, with its student readership climbing 2% points this year to 9%. Wanbao continues to lead Shin Min by 2% at 16%, although the gap is narrowing judging by the trend over the past 3 years.

"A number of editorial changes which took place in the Chinese publications this year could have resulted in changes in readership preferences. Zaobao, for example, is appealing to a greater pool of students this year, likely due to the repackaging of ZBNow and inclusion of Popcorn," explained Ms Tan.

Commenting further on the print readership consumption patterns, Ms Tan said: "In Media

Index 2004, shifts in print readership consumption patterns are seen particularly in the PMEBs and student readers. A rising trend in PMEBs' consumption of the dailies, in particular

English papers, was seen and the Chinese papers appear to be attracting more students. With the cessation of one of the freesheets, Streets, by the end of the year, the print media landscape will definitely be undergoing further changes in reading patterns and readership."

Magazines

In terms of magazines readership in Singapore, the titles tracked by Media Index have shown a higher demand in 2004. Entertainment titles as well as women's magazines have generally garnered higher reach.

People have shown a greater thirst for showbiz news as evidenced by the increased consumption of local entertainment magazines. More people have read I-weekly (8%), 8 Days (5%), and YOU Weekly (5%) this year.

Her World remains the most read women's magazine, reaching out to 7% of the population—the greatest improvement among the female monthlies. Her World is followed by Cleo and Female, which both saw hikes of 1% point in readership. Other titles in the same category such as Women's Weekly, Citta Bella, Elle and Nuyou also saw improved performances.

Nielsen Media Research's Annual Print Readership Survey also tracks other lifestyle habits of the Singapore population including their internet usage, frequency of cinema visits and the use of public transportation etc, to better understand the various consumption habit and changes of the Singapore population.

New Appointments

Gonzalo Fuentes



Gonzalo started his marketing research career in 1994 and then moved to the UK in 1996 to take a post-graduate degree in Applied Social and Market Research, Westminster University. He then joined Research International in the UK. He was working there for 18 months within their quantitative Consumer Division branch and was able to extend his experience on ad-hoc quantitative approaches together with qualitative analysis.

From 1998 to August 2004, Gonzalo has been in Millward Brown Spain as a Group Account Director, having greatly contributed to the development of the Ad-hoc and Qualitative business for MB in Mainland Europe. Since September 2004, he has taken over as the Managing Director of Millward Brown in Singapore.

Chhavi Bhargava



Chhavi entered the field of Market Research in 1994 with IMRB – Millward Brown's associate company in India. As a part of the Quantitative Research group at IMRB for close to 11 years she has had experience in conducting varied types of Adhoc and Continuous researches for heterogeneous categories such as FMCG products, Services, Durables and Social and Health Issues such as AIDs, Contraception, Family planning etc.

Chhavi has moved to Millward Brown Asia Pacific, Singapore as Group Account Director in October 2004 and is responsible for Client Servicing for the clients being serviced out of Singapore office.

ACNielsen Singapore Announces Senior Appointments



The second half of 2004 saw appointments of several key Associates in ACNielsen Singapore.

Ms Vicky Santos, has been appointed Executive Director for Customised Research in the Singapore office. Previously from the ACNielsen Taiwan in the same capacity, Vicky's market research experience spans over 19 years, across a broad range of applications and industries.

Ms Elizabeth Lee, previously Director, ACNielsen Online, South East Asia, is now Director for Client Service, Singapore, with specific responsibility for growing ACNielsen International Research business. Ms Lee has joined ACNielsen for almost 10 years.



Ms Toni Er has been with ACNielsen Singapore for three years, and has recently been promoted to Associate Director in the Customised Research Services. As the local Online champion, she will continue to drive the local sales strategy and implementation of our Online product.

"These appointments are a clear demonstration ACNielsen's commitment to people development and encourage best expertise sharing by our senior leaders around the region," said Mr Bienvenido Niles, Regional President, ACNielsen, Asia Pacific. "We are confident that these appointments will benefit our clients in the region and result in greater client satisfaction."

Research International Announces Promotion of Rupam Borthakur to Associate Director

Rupam joined Research International in August 2002 from India's leading agency, IMRB, where he worked on one of its biggest client account, handling large scale multi-country projects covering the Indian sub continent and the West Asian and African markets.

Rupam has extensive experience of international research programmes and his experience spans across a wide range of business issues, covering both consumer and business-to-business markets. This includes key marketing questions in areas such as branding and communications, customer relationships, understanding general attitudes and usage and new product development.

At Research International, he also forms part of the RI global *Marketing Science Network** and has a good working knowledge of Research International's proprietary products as well as specialist research methodologies like conjoint.

Rupam holds a master's in Business Administration specialising in International Business and a bachelor's degree in electronic engineering.

*Marketing Science Network within Research International champions and spearheads specialist research techniques and methodologies and is headquartered at Research International, London with RI Singapore being one of its key regional centres.



This issue is coordinated by ACNielsen Singapore