



Bulletin

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Market Research explores cyberspace

The Intercontinental Hotel was once again the venue for the annual Research Day 2005, organised by *AdAsia* in conjunction with the Market Research Society Singapore.

Over 130 delegates turned up to listen to speakers from the major research houses, interactive agencies and media buying houses. The theme this year was 'Getting It On Online', a look at how the Internet and new technology was now being used in the field of market research and how online advertisements and consumers were being tracked via the Web. Allein Moore, Editor of *AdAsia*, said that initially he was worried that the speakers would overlap and perhaps give similar presentations but his fears proved unfounded.

Chong Lee Sah, President of the Market Research Society Singapore, opened the day. Each speaker added a new dimension and one senior researcher said that he didn't expect to learn anything new during the day but he had in fact gained a lot from attending.

Speakers included Vicky Santos of ACNielsen, Darren Smith of Synovate, Jon Briggs of TNS, Phillip Jones of TNS, Jenny Lau of Hitwise, Mike De Los Reyes of Initiative and Calvin Ho of GMI International. Peter Moss of OgilvyOne added humour with his presentation and added some bizarre websites to brighten up the day for the audience.

What did come out clearly from several presentations was that research conducted online was growing substantially (around 20%) each year. In 2005, US\$1-1.5 billion was spent in the area of online research. About a quarter of all research is now conducted this way. There are a few pitfalls such as not knowing precisely who is answering the questions and often it is impossible for the respondents to ask questions if there is something they do not understand.

In closing, Moore played tribute to Sue Phillips of Synovate who precisely summed up the presentations and hosted the panel discussion and question time. He also thanked the main sponsors ACNielsen, Synovate, TNS and special sponsor Blackbox Research. Each delegate left with a chocolate box sponsored by CLS, GMI, Joshua Research, Millward Brown and Saffron Hill.

This is the third year of this event and judging by the number of delegates and the support from the research industry, it seems this is becoming a well-established event for the advertisers and agency people as well as the research industry itself.

Reproduced, courtesy of AdAsia

Get-together

MRSS Seminars 2005 Attendees and Speakers

150 MRSS members and non-members attended the MRSS Seminars 2005 from April to July.

On 3 August, attendees and speakers got together to network at the YMCA Function Room.

The evening's highlight was the presentation of certificates of attendance.

Tokens of appreciation were also given to the speakers who have contributed much to making the seminars possible.

Frank summarised feedback on the various sessions which will guide next year's MRSS education programme. Siew Hoong talked about career opportunities in market research, with the warning that market researchers do not make big bucks but true researchers are passionate about their work and get a high from job satisfaction (indeed?)

And to thank those who submitted feedback forms, a lucky draw was held, with prizes (shopping vouchers) going to Jitendra Papneja, Nishant Kaushal and Hoe Pei Lin (all from Research International!)

Asia Pacific Research Firms Launch Specialist Research Journal

Singapore Sept 2005 – A group of Asian based Market Research consultancies have come together to produce a dedicated market research publication for the region. *Asia Research* is a regional, quarterly print publication for those with an interest in market research throughout Asia.

"Market Research has increasingly become an important tool for product development and marketing support in Asia. However there is a lack of regular, dedicated publications for the industry in Asia" said Sebastien Barnard, Editor of *Asia Research*.

The readership of the journal will include a wide variety of organizations with an interest in market research. These include local and multi-national research agencies, end clients and research buyers from around the region from both local companies and MNCs. The journal will also be circulated in Europe and the US, where research firms who are undertaking projects in Asia will be able to keep up to speed on industry developments and regional market news.



Asia Research is sponsored by various market research firms of diverse size and specialisation located in Australia, China, Hong Kong, Indochina, Korea, Malaysia and Singapore. They have come together to promote and inform research buyers of market developments and methodology issues associated with conducting research in Asia.

The journal also includes business news from the region, factual data and marketing news aimed at assisting marketers and business planners. *Asia Research* is also aimed at providing the industry with an avenue to recruit specifically for research, fieldwork and interviewer positions.

Asia Research is available online at www.asiaresearch.com.sg

For further information please contact Mr. Sebastien Barnard, editor of *Asia Research* at editor@asiaresearch.com.sg or Tel: +65 6513 4205



Kadence Taps the Sentiment of Asian Businesses through the First Pan-Asian Business Omnibus

Kadence Asia Pacific, the specialist business-to-business market research firm based in Singapore, has introduced Asia's very first business omnibus, *KadBUS™*.

This business omnibus has been set up by Kadence in recognition of the growing importance of the Small & Medium Enterprise (SME) sector to Multi-National clients. SMEs are a vast pool of potential customers, always adapting and re-inventing themselves in light of changing economic circumstances, and therefore up-to-date information on this important sector is crucial to suppliers of business services and products.

KadBUS™ uses the same principle as consumer omnibus, i.e. a standard sample, standard demographic questions, and the facility for multiple clients to place proprietary questions on the survey.

KadBUS™ samples 300 businesses in each of the main Asia Pacific market every 3 months. The survey covers companies of 1 to 200 employees including sole proprietorships, partnerships, and private limited companies.

Piers Lee, the architect of *KadBUS™* and head of Kadence Asia Pacific commented, "The challenge with business omnibus is that unlike consumer research, each business can have several decision-makers for the company. Consequently, we actually run two buses per market, one targeting the main decision-maker for financial products, "*KadBUS™ Financial*" and the other IT-related products, "*KadBUS™ IT*". These decision-makers represent the lion-share of overall purchasing for businesses, and the ones of most importance to research buyers".

Piers continues "We have received considerable interest in our business omnibus from both end-clients and other research firms. Clients are attracted by the lower cost associated with syndicated surveys, but with the flexibility of asking any question and these questions remaining proprietary to the client. Because most the Asia Pacific countries are surveyed by telephone from our centralized call centre in Singapore, we achieve considerable savings, both in terms of turn-around time and costs of undertaking the survey. By using Kadence's browser-based CATI technology, clients are able to view the progress and results of the survey real time, any time, any place."

Another application of *KadBUS™* is the ability to access more affluent consumers across Asia Pacific. Generally the business decision-makers interviewed in *KadBUS™* represent the top 5% of income earners. This allows client companies looking to market their products to these groups another option in undertaking mass affluent research without making the very significant investment usually associated with other affluence surveys.



TNS Asia Pacific restructures for growth in regional accounts

Designed to harness the advantages of increased unity between its regional business centres, leading market information company, TNS has introduced a new organisational structure that brings together its Hong Kong and Singapore regional sales and client service operations.

In addition to consolidating the expertise and best practice within the two regional sales hubs, the coming together of the Hong Kong and Singapore offices is expected to drive regional Multi Country business as well as leverage international research capabilities across both offices. It is further anticipated that the new structure will enable the very strong operational capabilities of TNS Hong Kong including its newly developed Access Panel capability - branded 6thdimension, to be fully optimised both in Singapore and throughout the wider region.

Reflecting the already regional nature of more than two thirds of the business in the two offices, the reorganisation means that regional clients will now be even better serviced from one rather than two cities, with a clear link to more centralised telephone and on line data capture.

Spearheading the move is former Managing Director of TNS Hong Kong, Mr. Wander Meijer who In addition to overseeing operations in Hong Kong and Singapore, is now responsible for both TNS Asia Pacific Access Panels and the region's International Calling Centre including a new Guangzhou CATI facility – both key elements in the continued and anticipated growth of the company's multi country and international research businesses. Grant Bertoli continues in his existing role as Managing Director of TNS Singapore and Wade Garland, previously deputy managing director for TNS Hong Kong, is now Managing Director of TNS Hong Kong.

Commenting on this latest development, James Hall, Regional Managing Director Asia Pacific said, "The decision to formalise the synergy between two of our core Asian business centres reflects our focus as a company on enhancing our market driven responsiveness for regional clients. This reorganisation represents the start of a planned series of changes that will individually reinforce our operational excellence, as well as collectively ensure we are best positioned to address future market needs of the region and also those of global clients"



"... this means that regional clients will now be even better serviced from one rather than two cities, with a clear link to more centralised telephone and on-line data capture..."

Asia's expanding waistline swells spend on health foods

According to the latest TNS Asiapanel consumer purchasing data released, more consumers than ever are making a move towards a healthier lifestyle.

Based on the responses of a robust and representative panel of nearly 40,000 households in eight countries around the region, this apparent concern amongst shoppers, evidenced by significant year on year growth in spending on health foods, is the number one 'Mega Trend' in consumer behaviour. See graph overleaf.

Revealed as the most health conscious are the Taiwanese consumers. In 2004, over 50 per cent of the total grocery bill of each Taiwanese household was spent on healthy products*.

Showing similar increases to Taiwan is Vietnam -- the country in which more households than any other (90%) expressed a willingness to pay more for health foods and drinks. (*Health products include Fruit/Veg. juice, RTD Tea, Packaged Water, Olive/ Corn oil, Cereals, Yogurt & Yogurt drinks, liquid milk, Essences, Vitamins and Bird's nest.)

Comparing the percentage of Overweight or obese by country, Asia is fairing much better than the Western World although this epidemic seems to be catching up. To explain this phenomenon, the latest TNS Asiapanel consumer purchasing data also revealed a significant growth for snack foods purchased by consumers in several countries, for instance, a massive 91 per cent year on year increase of snacking products purchase in Vietnam. Following that, the growth in snack foods could potentially see the country's currently low incidence of obesity rise.



"... the positive trend in consumer spending on more health conscious foods products across the region is heartening..."



Commenting on the latest figures, TNS Asiapanel stated, "Health and well being is a worldwide concern and whilst obesity levels across Asia remain relatively low in comparison to western nations, the positive trend in consumer spending on more health conscious food products across the region is heartening -- especially in Taiwan and Vietnam where the latest figures point to a recognition that action needs to be taken if obesity is to be reduced and prevented respectively. However, for countries such as Malaysia and Thailand where obesity, snacking and convenience foods are on the increase, the findings should serve as a wake up call"

NEW APPOINTMENTS



TNS announced today the appointment of Patricia Greene, Director and Bruce Liew, Associate Director of Interactive.

Bruce is responsible for developing and promoting online Business Solutions, as well as online research technologies – key of which is the recently launched Singapore Access Panel.

“High Internet penetration rates, strong validation and learnings, and clear research benefits have resulted in the growth of online research here and in the region. I’m happy to be in a position where I can further propel the adoption of online methodologies,” Liew said of his new appointment. He also mentioned some of the research benefits which include time and cost savings, as well as improved quality of response.



Patricia has more than 15 years of marketing research expertise, initially in the United States, then TNS South Korea, followed by Singapore. She has experience in the full range of qualitative and quantitative research techniques.

Patricia’s areas of expertise include brand and advertising research, consumer segmentation and strategic planning. Her clients cover a broad spectrum of categories such as IT, FMCG, automotive, health and beauty, finance and electronics.

Before joining TNS, Patricia worked in strategic insights and planning for advertising agencies such as J. Walter Thompson and McCann-Erickson Worldwide. She has a strong foundation in brand development research through monitoring advertising campaigns against sales and promotions. Since relocating to Asia Pacific, Patricia has acquired vast international experience managing regional projects throughout Asia Pacific, as well as North America, Europe, Russia and Middle East, for local and multi-national clients

Both Patricia and Bruce will be based in Singapore and will report to Melanie Ng – Head of Research.

World Peace, Consumption Clout And Digital Rules: Young Asians Give Their Take On The World

SINGAPORE – Today's young Asian is a multi-tasking, interactive, digital-driven consumer according to Young Asians, a new study released by leading global market research company, Synovate.

Synovate Director of Media Research Asia Pacific, Steve Garton, said the survey, a first for the region, threw the door wide open on the lives of Young Asians aged eight to 24, exposing their spending habits, media consumption, favourite brands, dreams and aspirations.

"Conducted in conjunction with MSN, MTV and Yahoo!, Young Asians is a comprehensive study conducted across eight markets that reveals the hearts and minds of Asia's connected youth and young adults," he said.

"The survey provides an essential 'finger on the pulse' of what defines Young Asians today."

So, 'wassup' with Young Asians?

"A consumption crazy, aspirational, driven generation, they are money-focussed yet moral, school is important and success everything. Their favourite food is fast, favourite drink is soft and preferred birthday gift a mobile phone."

The study found that while Young Asians start off wanting be doctors, by the time they hit 15 the desire for money develops and the career of choice becomes a business owner.

Their preferred sports to play are badminton and basketball/netball while basketball and soccer are the sports of choice for watching or reading.

Mr Garton said that the consumption clout of today's youth is substantial with eight in ten Young Asians influencing family shopping for soft drinks and snacks, three quarters influencing the family visit for fast food and six in ten influencing the TV channel watched when sharing the viewing.

"However, it's not all sport and shopping. Today's Young Asians worry about the future ahead and what being an adult may hold for them. A secure job is the number one concern about growing up for 19% of Young Asians, while 16% worry about being financially stable and 9% worry about adult responsibilities.

"There's a sense of excitement about adult life though, with 16% looking forward to the prospect of having a family, 15% ready to be independent and influential and 9% eager to enjoy adult activities like drinking, travelling...and having sex," he said.

A cliché that has graced the lips of many a politician and beauty queen still holds true for Young Asians, 18% of whom voted world peace as the number one change they would make to the world. A further 16% are aspiring activists, wanting to change social problems like drugs and corruption.

"But don't be fooled by this altruistic bunch, for 15% of Young Asians named 'themselves' as the one thing they would change about the world, wanting to be more popular, better looking, or simply famous," Mr Garton said.

The Internet and digital technology are fundamental to Young Asian lives, fuelling their desire to stay connected and central to their interaction with peers. 62% have their own mobile phone, 45% have their own desktop computer and half of 12 to 24 years olds name the Internet as the most helpful medium for product and service information over TV (32%) and newspapers (10%).

While listening to their MP3 players (owned by 23% of respondents) you'll find Young Asians searching the web for information, emailing, downloading entertainment and interacting with their friends, and games, online. And this trend will grow, with one third of Young Asians indicating that they expected to be spending more time on the Internet next year compared to this year.

President of MTV Networks Asia Pacific, Frank Brown, was pleased to note that the results identified MTV as the channel attracting the highest Young Asian viewership. Besides audience numbers, he said this study "reconfirmed MTV's leadership and influence among Asian youth and young adults".

"This Young Asians study helps keep MTV on the cutting edge of youth multimedia, with up-to-date insights on the most influential young Asians who lead their peers and are continually at the forefront of technology adoption," he said.

General Manager of MSN South East Asia, Grant Watts, said the Young Asians survey provided a unique insight into the extent to which digital technology had affected the lives of the world's first generation of people to grow up with the Internet as an integral part of everyday life.

"A rare glimpse into the life and times of today's digital generation, Young Asians shows just how extensively digital technology and the Internet have affected their habits, with email and instant messaging becoming central to keeping in touch with their friends and the world," he said.

Tom Sipple, Director of Sales at Yahoo! Southeast Asia, said: "The results from this study reinforce the strength of the Web as a vital media for advertisers wanting to reach out to the tech savvy and highly connected youth audience.

"Because of the crucial role the Internet plays in the lives of young Asians for communication, information and entertainment, major brands looking to reach out to this audience will increasingly need to leverage the Web as part of their media mix to achieve maximum results," he said.

The study includes a segment of Young Asians with the highest household incomes across the region that can be linked with the respected Synovate PAX study of affluent Asian adults.

"Linking the income levels of affluent Young Asians with the Synovate PAX study provides the regions' first seamless picture of high-end consumption and product ownership from youth through to adulthood, giving rich insights into the changing patterns of consumption throughout people's lives" Mr Garton added.

About Young Asians

Synovate Young Asians is an industry-wide tracking survey that provides credible, relevant information on the media, purchasing and leisure habits of Asians aged eight to 24. The study includes a segment of Young Asians with the highest household incomes across the region that can be linked with the respected Synovate PAX study of affluent Asian adults.

Conducted across eight Asian markets including Hong Kong, Singapore, Taiwan, Malaysia, Thailand, Indonesia, Philippines and India, Young Asians provides detailed information on consumption and attitudes from childhood to early adulthood to meet the needs of regional media, marketing and advertising specialists.

Synovate Launches ViewsNet Online and Panel Research Service in Singapore

Synovate, the market research arm of Aegis Group plc, has announced the extension of ViewsNet - its custom online and panel operation – into Singapore.

Managing Director of Synovate Singapore, Miranda Cheung, commented, "ViewsNet is already present in America as well as Europe, so the expansion into Asia Pacific, starting with Singapore, ensures that we can supply online and panel research to clients in key global markets".

The ViewsNet offering comprises three core elements: secure and controlled panels available online, by telephone, by mail and face-to-face; a central operations function that coordinates global efforts; and a centre of excellence for the development and implementation of best practice procedures for online and panel research.

ViewsNet combines expert panel management with leading-edge interpretation to ensure a fast, accessible and cost effective solution to panel needs across all data collection methods. It can be used for complex projects, integrating online and offline methodologies, as well as low cost surveys where there is a need for fast, indicative research.

Reliable data and a fast turnaround of results are assured through the combined benefits of highly efficient project execution, expert knowledge in panel recruitment and management, and the selection and matching of panellists to specific project needs.

Adrian Chedore, Global CEO of Synovate commented, "Synovate has undertaken online and panel research for many years and has built up a wealth of expertise and thought leadership in this sector.

"ViewsNet is the umbrella under which we have bought all these skills and knowledge together offering local market knowledge, big picture expertise, and central coordination and management."



SAFFRON HILL RESEARCH IS EXPANDING

Saffron Hill Research, an independent market research agency headquartered in Singapore, is opening an office in the Philippines this September. Saffron Hill Philippines will be headed by Rina Zurbito-Igual who has been in the market research industry for more than 12 years now. "I am pleased to be starting Saffron Hill Philippines. I am greatly looking forward to expanding the Saffron Hill research philosophy into the Philippine market and I expect clients likewise will appreciate their focus on high quality custom research, original thinking and addressing the client's unique business needs." says Rina.

Raymond Ng, Director of Saffron Hill (Singapore) says that Philippines is a good start for a regional roll out of Saffron Hill in Asia. "We are positive about the Philippines and we are very happy that Rina will be heading it. We do plan to open other offices in response to our increasing regional projects but we would like to remain boutique, lean and focused everywhere. This is what we are about."

Saffron Hill Singapore also has a new addition to their team. Pam Riola, who used to head up San Miguel Beer Research in the Philippines has joined the Singapore office as Senior Research Manager, focusing mainly on quantitative projects.



The Label-Conscious Global Shopper – Only Partly Understanding Food Labels, but Selective Nonetheless

Singaporean Shoppers are most concerned about fat contents in packaged food

Half the world's consumers understand the nutritional labels on food packaging only 'in part', just two in 10 'always' check grocery labels, four in 10 do so only when buying a product for the first time and nearly three in 10 check them when buying certain food types, according to a study released today by ACNielsen, the world's leading marketing research and information company.

The twice-yearly global ACNielsen Online Consumer Opinion Survey, the largest of its kind, polled over 21,100 respondents in 38 markets from Europe, Asia Pacific, North America, Latin America and South Africa (See Table 1 for country breakdown). The study asked consumers around the world how much they understand food labeling, when they would check labels and what they check for as they do their grocery shopping.

On average, one-fifth of consumers in Asia Pacific, Europe and North America 'always' check the nutritional labels on packaging, with Latin Americans the most label-minded, where a third of consumers claim to 'always' check labels on packaged food. The most likely occasion for checking the nutritional label, not surprisingly, for an average of four in 10 consumers worldwide, was when trying a product for the first time.

In Singapore, less than two in 10 consumers take a consistent interest in the nutritional labels of the packaged food they buy, while those who do are only concerned under specific circumstances. Findings revealed that the majority of local consumers are interested in the nutritional information of a product particularly when they are buying a certain type of food (43%) and when they are considering purchasing a product for the first time (42%). Others claimed to check nutritional values when they are on a diet or are trying to lose weight (22%), when they have the time (16%), and when their children are consuming the food (12%). However, for seven per cent of the population, the content in their packaged food is of no interest! (Chart 2)

"For manufacturers of packaged goods, the product's nutritional proposition and the clarity of the information on the nutrition panel is important at the point of product trial. Whether the product 'contents' meet the consumers' selection criteria, and how easily the label is understood, can determine whether or not the consumer proceeds to purchase the product, or return it to the shelf," said Mr Ashok Charan, Managing Director of ACNielsen Research Singapore.

Across Asia Pacific, Thailand (41%), India (32%) and Malaysia (29%) made the world's top ten countries where people claimed to "always" check food labels. At the other end of the scale, those most likely to 'never' check food labels were the Japanese (24%), followed by the Finnish (15%) and Dutch (14%).

And while consumers are checking labels, they don't necessarily understand what they're reading. Half of the world's consumers said they only 'partly' understand the nutritional labels on food, with 60% of Asia Pacific's residents leading the world in this lack of understanding, followed by Europeans (50%) and Latin Americans (45%). Most conversant with food labeling were the North Americans, with 64 percent claiming to 'mostly' understand food panels.

Out of the 13 Asia Pacific countries, New Zealand was the only country making it into the world top 10 list of understanding food labels, with 61 percent of Kiwis claiming to 'mostly' understand information on food labels. The percentage of consumers who claimed not to understand food labels at all vary from one per cent in Thailand to 12 per cent in Japan. In Singapore, six percent of locals admitted to being totally ignorant of food labels, placing it on par with the regional average. On the other hand, almost four in 10 are familiar with food labels, while more than one in two only understands them partly. (Chart 3)

Globally, the ingredients most likely to be checked for by consumers were Fat (49%), Calories (43%), Sugar (42%), Preservatives (40%), Coloring and Additives (36% each). Not surprisingly among the five regions surveyed, consumers in North America and Latin America topped the list for most regularly checking out Fat, Calories and Sugar levels. This trend is similar in Singapore, although two out of the top three items varied for Asia Pacific as a whole.

While Preservatives (47%), Fat (45%), and Coloring (43%), garnered the most attention from Asia Pacific consumers, it is Fat (50%), Calories (42%), and Sugar (40%) that Singaporeans are most interested in and claimed to check these on their food labels regularly. (Chart 4)

Further, when asked whether they knew the distinct difference between *Saturated* and *Unsaturated* Fat, a global average of 56 percent claimed to, which was fairly consistent across all regions surveyed. On the other hand, among the top 10 markets claiming not to know the difference, the Japanese ranked number one (73%) followed by two thirds of the French (69%), Taiwanese (63%) and Chinese (61%).

Compared to the rest of the Asia Pacific countries, Singaporeans appear to be more 'well-informed' when it comes to knowing the difference between Saturated and Unsaturated Fats. More than 6 in ten consumers (66%) here are aware of the distinction between these two Fat types, making it the third country, after Thailand and New Zealand, where 68 percent of consumers can differentiate them.

"Consumers the world over are screening out products containing ingredients they consider to be unhealthy for them, and making their own personal decisions about levels of fat, sugar, etc. In developing markets, consumers appear to be more concerned about preservatives and additives than they are about calories, while in developed markets consumer focus is on screening out products with contents that make them gain weight, and may reflect the obesity battle being faced in a number of these markets," said Mr Charan.

Despite all the hype about the Atkins and other low-carb diets, consumers appear to be more interested in screening out other ingredients first, with a global average of just 28 percent claiming to check for the amount of carbohydrates on labels. Carbs were of most interest to Latin Americans (44%) and North Americans (37%).

And the latest diet craze, the Low GI diet (Glycemic Index), registered for only 11 percent of consumers globally, lead by South Africans (17%) and Latin Americans (22%). Only eight percent of North Americans checked for Low GI on labels.

Phil Lempert, a food trends analyst and ACNielsen consultant in the U.S., said some of the findings can be attributed to what information is currently available on product labels. "Relatively few people check the glycemic index because very few companies are including the information on the labels of products sold. But that will soon change. The glycemic index is set to become the next big thing in the food industry because it takes carbohydrates to the next level – from the amount of carbs a product contains to the impact that the carb level will have on a person's weight and energy."

Indeed, when asked whether they had heard about the GI, 59 percent of global consumers claimed not to have heard of it, and only 34% across Asia Pacific. However, of the top 10 markets to have heard of the GI, Australia ranked number one (82%), followed by Korea (80%) and New Zealand (76%), suggesting that the diet craze is generating publicity in some countries more than others. The majority of Singaporeans are still oblivious of this new diet fad—only one in four claimed to have heard about it.

Table 1 The 38 Countries Covered in the 2005 Global Consumer Confidence Study were:

North America	Europe		Asia Pacific
U.S.	Austria	Sweden	Australia
Canada	Belgium	Switzerland	China
	Denmark	Turkey	Hong Kong
Latin America	Finland	UK	India
Brazil	France		Indonesia
Chile	Germany		Japan
Mexico	Greece		Korea
	Italy		Malaysia
Emerging Markets	Ireland		New Zealand
Poland	Netherlands		Philippines
Russia	Norway		Singapore
	Portugal		Taiwan
South Africa	Spain		Thailand

Chart 2

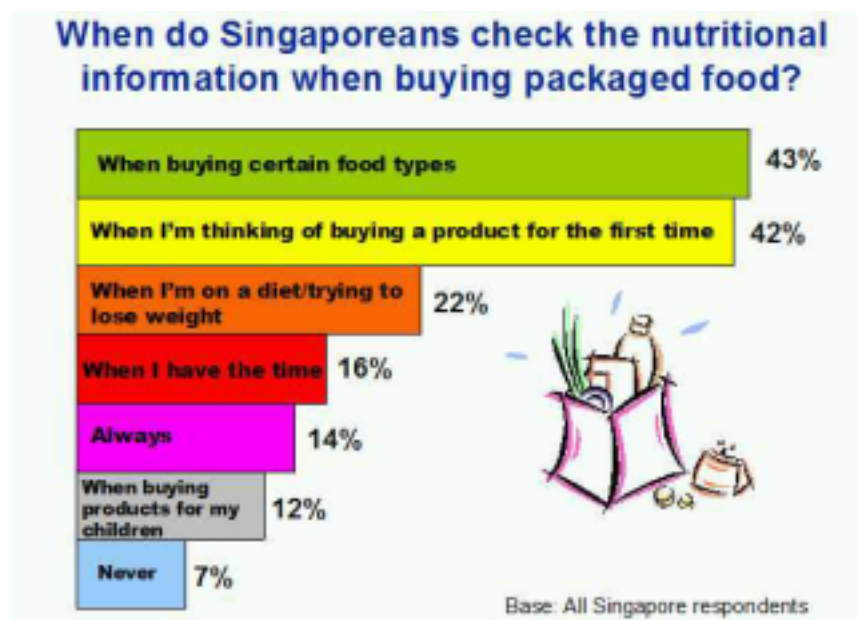
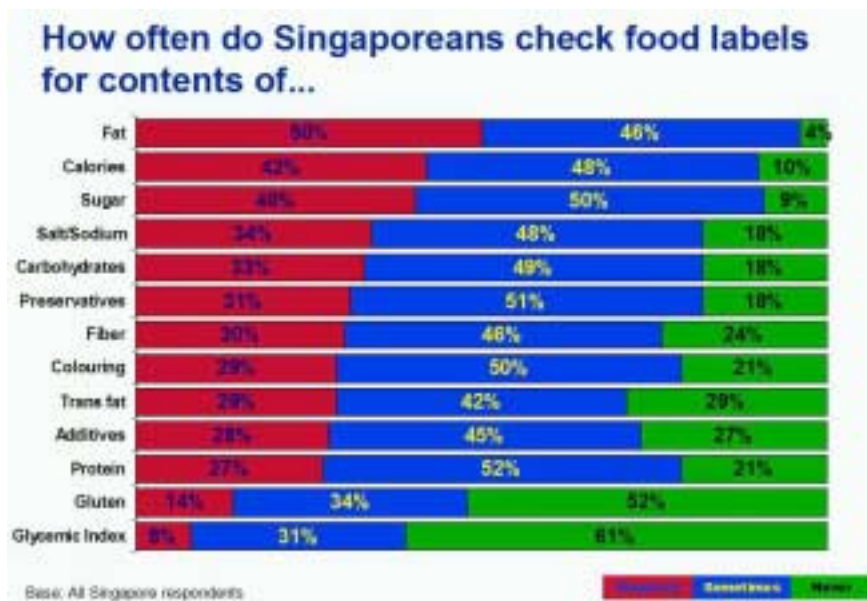


Chart 3



Table 4



This issue is coordinated by TNS