



Bulletin

Issue 5, March 2006

A quarterly MRSS newsletter

Marketing Research Seminars

The MRSS is pleased to announce that we will be running the seminars for year 2006 soon. This year's seminars promise to be better and more exciting, and we have made several changes based on past years' feedback and suggestions.

The format for this year's seminars is very different from the past, and the main emphasis for the seminars is depth. Most of the topics are covered in 2 sessions, so as to give the speakers more time to share real examples and to interact with the participants.

We have also added several non-MR topics to this year's seminars. These non-MR topics include several vital 'soft' skills for marketing research professionals such as presentation skills, creating professional image as well as project management.

The venue has also changed to the TMC Education Group located in Capitol Centre, just opposite the City Hall MRT Station.

You can find out more about the seminars via our MRSS website: www.mrssingapore.org.sg

MARKET RESEARCH TOPICS	DATES	
Quantitative Research Methods/Sampling	18 & 19 April	(Tues & Wed)
Questionnaire Design	23 & 24 May	(Tues & Wed)
Fieldwork Management	25 & 26 April	(Tues & Wed)
Quantitative Analysis & Reporting	27 & 28 June	(Tues & Wed)
Workshop on Qualitative Research Methods – Basic	25 & 26 July	(Tues & Wed)
Strategic Analysis of Qualitative Focus Groups - Advanced	29 & 30 Aug	(Tues & Wed)
Multivariate Analysis	19 & 20 Sept	(Tues & Wed)
Branding Research	31 Oct & 1 Nov	(Tues & Wed)
NON MARKET RESEARCH TOPICS	DATES	
Project Management	20 April	(Thur)
Creating a Professional Image (Women)	30 May	(Wed)
Creating a Professional Image (Men)	31 May	(Thur)
Time Management	29 June	(Thur)
The Model for Effective Meetings	27 July	(Thur)
Conflict Resolution Skills	31 Aug	(Thur)
Presentation Skills (Basic)	26 & Wed 27 Sept	(Tues & Wed)



Consumer Confidence Improving the World Over, Says ACNielsen

Consumer confidence in their local economies, job prospects and their personal financial situation is on the rise globally. The Consumer Confidence Index introduced by ACNielsen earlier this year grew from the average 92 points in May 2005 up to 98 points in November, with two thirds of countries seeing it rise.

The world's most optimistic consumers live in Asia-Pacific and North America. India maintains the biggest confidence. In Singapore, consumer confidence is seeing growth, with its ACNielsen Consumer Confidence Index having risen by four points since the last survey to hit 103—surpassing the global average by five points. (Chart 1)

These are among the findings from the latest global online survey by ACNielsen, the world's leading market research and information company. The survey, conducted in November 2005, polled over 23,500 respondents – regular Internet users – in 42 markets.

On job prospects and personal finances

Consumers in Asia-Pacific continue riding on a wave of economic development, the

IND:132+	HK:106	BEL:100+	TH:96 -	GRE:87+
NZ: 123+	ARG:105	FIN:99+	BRA:93+	AT:85 -
NOR:120+	INDO:104+	RUS:99-	PH:93+	TW:80-
DEN:119+	POL:103+	UK:99+	SWE:93+	FRA:77-
AUS:117+	SG:103+	MEX:98+	HU:90	JAP:76+
MAL:114+	US:103+	SWI:98+	TR:90	KOR:62+
IRE:112-	CHI:102+	CZ:97	GER:89+	POR:60-
CAN:110+	SA:102-	NL:96+	ITA:89+	
UAE:110	SPA:101+	GLOBAL AVERAGE 98		

confidence index increasing in nine out of 13 markets. India has made even bigger leap in faith and stays on top of the global list with its confidence index at 132 points – nine points ahead of the world's second 'most optimistic' nation, New Zealand. Even the Japanese and South Koreans, with the lowest confidence indices globally, have improved their forecasts of the future. In Japan, 45% more people believe in better job prospects over the next year, compared to the number in May 2005. Although only up to one fourth of respondents in Japan and South Korea lay positive hopes on the future state of their personal finances, opinions have increased that now is a good time to buy things they want and need. Marketers of consumer goods and

services, however, shouldn't expect too much here, for the study shows that Asians are the world's most saving people, with 52% of them putting spare money away for a rainy day.

In Singapore, consumers are certainly poised for a better year ahead where the local economy and job status are concerned.

“Our findings reveal that concerns for the economy and job security dropped even before the latest economic data was released by the government. Positive economic growth of 5.7 percent in 2005 and continued growth forecast by the local government have painted a more optimistic outlook for next year and helped raise consumer sentiments,” commented Mr Ashok Charan, Managing Director of ACNielsen Research Singapore.

He added, “The recent release of unemployment figures dropping to 2.5 percent also corresponds with optimistic consumer sentiments on the job front as reflected in our survey. The percentage of Singaporeans optimistic about job prospects over next 12 months was increased from 60 percent from our June 2005 survey to 71 percent in the latest year-end one.”

	EXCELLENT	GOOD	NOT GOOD	BAD
1st half of 2005	2	58	38	2
2nd half of 2005	5	66	27	2

OPTIMISTIC ☺		PESSIMISTIC ☹	
1st half of 2005	2nd half of 2005	1st half of 2005	2nd half of 2005
60	71	40	29

People spent more on entertainment in summer

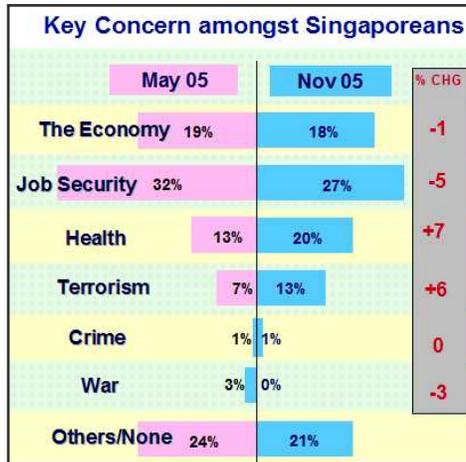
Speaking of what consumers do with the money left after covering essential living expenses, the summer season has clearly left its footprint on the spending pattern. Out of home entertainment, new clothes and holidays have come on top of the global list after savings, leaving the dull necessity of paying off debts and loans for the winter. This trend was mostly driven by European countries.

Asians, Australians and New Zealanders are mostly focused on savings and debt pay-offs – the global Top 10 for savings featured Asian countries only. However, holidays came in-between second on the list, with 35% of Asia-Pacific Internet users giving their spare cash for rest and travelling.

Singapore is once again amongst the top three markets of savers in Asia Pacific, with close to three in every five Singaporeans saying they would put their spare cash into savings. And taking holidays/vacations continue to be on top of Singaporeans' agenda when it comes to what to spend their money on. Close to half the respondents (48%) said they would spend their money on holidays/vacations. Next on their priority list is Paying off debts/credit cards/loans (32%), which is followed by New clothes (29%) and New technology (29%).

Major Concerns

Globally, consumers continue to rank their major concerns as the economy, job security and health.



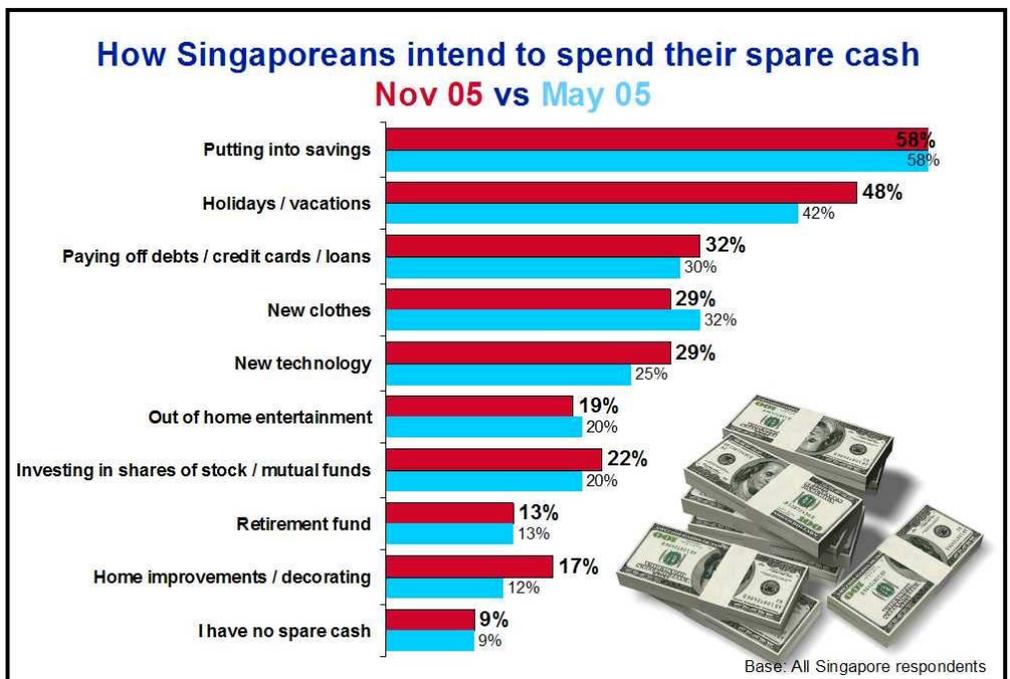
The economy is the biggest concern for most of the Asian countries, as well as the US, while job security is the top issue for Latin Americans. Health is the biggest or second biggest concern in Europe and North America with their ageing population. Polish consumers are worried over political stability, following the recent change of the country president.

The economy remains the key concern amongst Singaporeans, although it has registered a slight dip from six months ago. A significant increase in level of concern is seen

in Terrorism and Health, where hikes of 15 percent and 7 percent are recorded respectively.

He added, "There has been substantial news coverage recently on cases of terrorist attacks and Avian flu, in other part of the world, although Singapore is not directly affected, these reports have heightened awareness and concerns of the public towards these issues."

The ACNielsen Online Consumer Confidence Survey, the largest twice-yearly global survey of its kind, is aimed to gauge consumers' current confidence levels, spending habits/intentions and current major concerns. The most recent wave of the survey took place last month (November 2005) and polled over 23,500 consumers – regular Internet users – in 42 markets in Europe, North and Latin America, Asia-Pacific region, Africa (South Africa) and the Middle East (UAE).





TNS LAUNCHES NEW DATA DELIVERY PLATFORM

TNS Pilot Reports bring Worldpanel Insights Closer

Hong Kong 7th March 2006—Leading market information provider, TNS, today announced the launch of its latest innovation in data reporting – **TNS Pilot Reports**. Designed to increase the ease with which the most relevant data from TNS' 'Worldpanel' continuous consumer panels is identified and accessed, the new reporting platform is the latest example of the company's market driven approach to new product development.

The new template-based reports boast an easy to use interface, improved flexibility of data mining options and increased graphical presentation of data. A significant enhancement on previous reporting formats is the enhanced navigational tools. These include a 'questions-driven' drop down menu that presents information readily classified to allow quick and efficient access to the most relevant data. But perhaps the most appealing aspect to potential users is that the platform has been developed on standard Excel architecture, enabling linking into other MS Office applications and straightforward printing of reports.

"We have worked hand in hand with our clients at a local, regional and global level to really understand their needs", says Marcy Kou, Managing Director of TNS Worldpanel Asia. "TNS Pilot delivers speed of reporting but more importantly the right numbers for the right people. Managing Directors generally have different data needs to brand managers – the launch of TNS Pilot means we can deliver the most appropriate report format depending on whether you want a snapshot or to examine the detail. After

extremely positive feedback from our client base during development stage we expect huge demand for our new data delivery tool."

TNS Worldpanel operate 7 panels in the Asia Pacific region - China, Korea, Malaysia, Philippines, Taiwan, Thailand, Vietnam as well as Saudi Arabia in the Middle East. In addition, access to Japan data is via the Asiapanel network where TNS operate a marketing agreement with INTAGE, Japan's leading supplier of continuous panel data.

About TNS Worldpanel™

Worldpanel™ is TNS' continuous consumer panel sector, delivering insight into consumer purchasing and usage habits on a local and global scale.

Our coverage extends to more than 50 countries worldwide with services typically based on continuously monitored samples providing information on purchasing and usage activity. We use data collection technology best matched to the development of the environment that we are measuring, including bar code scanners, Internet, till receipt scanning as well as paper diaries and interviewing.

Worldpanel™ works closely with a wide range of clients including multi-national and local FMCG brand and private label manufacturers, fresh food suppliers, retailers, market analysts and government organisations.



Symmetrics rebrands to Synovate Loyalty, launches practice globally

CHICAGO – Synovate, the global market research firm belonging to Aegis Group plc, has announced that its Loyalty practice, Symmetrics, has rebranded to Synovate Loyalty. The rebranding represents the launch of this specialty practice, whose proven frameworks, solutions and consulting are now available across the globe.

Synovate's Loyalty practice was established by combining Synovate's extensive work in customer satisfaction research with Symmetrics Marketing Corporation, an industry leader in customer loyalty research and consulting.

"All companies struggle with how to acquire and maintain passionately loyal customers," said Dr. Lawrence Crosby, CEO, Synovate Loyalty. "Our Loyalty group helps companies conquer this challenge, achieve their business goals through customer loyalty and create a sustainable competitive advantage. Industry leaders such as Whirlpool

and HP speak frequently on the work we have done together to advance their customer loyalty strategies."

Company interest in customer satisfaction and loyalty measurement and management has grown rapidly in recent years and has now matured into a significant sector in market research. Customer loyalty is consistently in the top five challenges cited by global CEOs.

Using its unique *Customer Relationship Architecture*, Synovate Loyalty designs and executes the research needed to develop a customer loyalty strategy, shows companies how to drive customer loyalty into their businesses practices and processes, and offers monitoring programs and tools to keep the customer loyalty strategy on track.



The Leading Edge Expands in Singapore

Over the past few years Australian research company, The Leading Edge, has increasingly been conducting multi-country studies and delivering insight-based consulting to clients in Asia. In answer to an growing client need, and to provide support and a platform for future growth in Asia, The Leading Edge is now investing in a new state of the art office due to open on April 17th 2006 at The Red Dot Building in Singapore.

The Leading Edge specializes in using creative and unique research based solutions to provide competitive advantage to some of the world's largest businesses and brands in the fmcg, services and healthcare sectors. With its foundations based firmly in the research industry The Leading Edge's skill set extends beyond that, drawing from disciplines such

as innovation, brand building and planning, management consulting and econometric modeling. At the most recent ESOMAR conference in Cannes, France, The Leading Edge received international acclaim winning the Monti Fernando Best Paper for its ground breaking paper on Customer Centricity.

With offices in Melbourne and Sydney (for which it has won awards for its revolutionary office design for creative thinking and better collaborative communication), The Leading Edge Singapore office will continue to build on the company's philosophy to create an innovative and unique environment that reflects an organisational culture focused on bringing out the best in its people.

Call to arms:

Encouraging market research members to respond vociferously to criticism of the industry

By Greg Coops

The March issue of AdAsia ran a column from a planner at Leo Burnett who was riding the old anti-research, or rather, anti-focus group bicycle around the block. You know the theme – market research is always killing great new product and advertising ideas. “If we didn’t have those blinkered, bespectacled boffins moderating focus groups or running surveys in shopping malls we’d all be winning Gold Lions at Cannes and the skies would be blue baby...”

Speaking of blinkered, Malcolm Gladwell (author of “The Tipping Point”) has provided the anti-research brigade with some easy-to-digest stories on how research and focus groups in particular don’t work.

Hardly new and much of it wrong. But what better way to knock up a quick column than to recycle a few old myths? Especially if all it takes is reading “Blink” - appropriately described on the cover as “The Power of Thinking Without Thinking”... (couldn’t have said it better myself).

MYTH 1 - Focus groups were invented by the US military

Look, I’m no fan of George Bush either but we can’t insult the focus group by blaming it on the industrial military complex or the CIA.

The focus group comes to us via clinical psychology not the military. Think “One Flew Over the Cuckoo’s Nest” not “Hitler, My Part in His Downfall”. It is an immensely powerful research tool when handled by skilled practitioners. Some of the smartest people I’ve met in past 30 years in this business have been qualitative researchers - the psychologists, semioticians and anthropologists who observe patiently and think deeply about what makes irrational consumers do what we do. Can’t recall being blown away by any agency planners (no letters, please).

But I have been lucky enough over the past thirty years in research to have been involved in qualitative studies that have provided extraordinary insights into consumers and markets that have resulted in breakthrough ideas that have made millions of dollars (for them) and catapulted quite ordinary managers onto heroic career trajectories. All based on the now much maligned focus group.

Greg Coops is a researcher at Asian Strategies. He can be contacted at greg.coops@asianstrategies.com

MYTH 2 – Coke used focus groups to launch New Coke.

New Coke failed so therefore focus groups are rubbish. You know the story – Pepsi was gaining against Coke. Coke did research that confirmed that the company needed a sweeter formulation. Coke blinked and launched New Coke. Losers.

Of course research that is done badly, interpreted superficially or ignored because of corporate groupthink - as was the case in the Coke debacle - deserves criticism but Sergio Zyman (the then marketing director), the planners and ad agency drones were all telling Goizueta that he was on the right track launching the reformulated Coke. The only ones who were pointing out that the Emperor was sans clothes were the qual. researchers. The focus group work actually predicted the consumer resistance that eventually occurred because the same dynamic was observed in the research groups. But Coke management ignored this inconvenient fact (as did Gladwell in his book) and relied on the “hard”, incontrovertible quantitative data that was consistent with the decision to invade Iraq, sorry, to launch New Coke.

And forget about Old Europe, I mean Old Focus Groups. New Focus Groupland is an illuminating and exciting place in which to wander around. Sure there are research companies flogging the old “eight in a fishbowl” group discussions where a bunch of strangers is asked a list of questions and the “analyst” writes these down and unthinkingly plays them back on PowerPoint.

But there a lot of great researchers out there you can work with who don’t run groups this way. Contact the Market Research Society (Singapore) for a list. And if you are a researcher then please join me in standing up to these pathetic attempts to downgrade our profession.

Appointments

ACNielsen Announces Senior Appointments

Angus Ogilvy named Director of Automotive Practice Group, South East Asia
Karen Braddock Appointed Director for International Qualitative Research

ACNielsen Singapore announced two senior appointments in March 2006.



Mr Angus Ogilvy has been appointed to the newly created position of Director, Automotive Practice Group. In his new capacity, Mr Ogilvy will be responsible for the Southeast Asian markets and represent this region on ACNielsen's Asia Pacific Automotive Council. He is based in Singapore, and reports to

Mr Travyn Rhall, Managing Director, Customised Research & Chief Client Service Officer Asia Pacific.

Mr Ogilvy brings to ACNielsen specialised skills and experience in automotive research. Before joining ACNielsen, he was Deputy Managing Director, Europe, for NOP World Automotive responsible for the company's global account management for Automotive clients such as Aston Martin and Honda Motor Europe as well as overseeing the vehicle quality offering for other clients including Ford, Jaguar and Land Rover.

Prior to that, he spent ten years in progressive management roles at Maritz Research, with a one year stint in between as Director of Satisfaction Measurement with a London based management consultancy specialising in customer satisfaction, service measurement and effective contact management.



Ms Karen Braddock has been appointed Director, International Qualitative Research Director, Client Service, Singapore, with specific responsibility for developing the qualitative arm of ACNielsen's International Research division. She will also

take charge of driving ACNielsen's new proprietary qualitative approach, DeltaQual—a new research tool that provides insight into consumer choice.

Ms Braddock has over 12 years' qualitative and quantitative marketing research experience gained in the UK and South East Asia, including three years as director with ACNielsen Thailand. She brings to ACNielsen Singapore a wealth of experience spanning the FMCG, telecommunications, tourism, automotive and petroleum industries. In past, Ms Braddock had also been involved in the development of advertising pre-testing approaches, and brand tracking methodologies. Prior to joining ACNielsen Singapore, Ms Braddock was a psychotherapist for five years.



KRIS LAYUG JOINS SAFFRON HILL RESEARCH

Kris Layug, formerly with ACNielsen Singapore, has joined Saffron Hill Research as Director for Qualitative Research. Tessa Dimaano Brown and Raymond Ng, Managing Directors of Saffron Hill said "We are very pleased to have Kris join us. She has a brilliant reputation and her appointment strengthens our promise to our clients that we only have senior and very experienced researchers handle their accounts. Kris, having had more than 10 years of qualitative experience, will further add to our qualitative expertise.

This issue is coordinated by ACNielsen Research Singapore