



225 delegates from 9 countries



Client panel – Roshni Pandey (InterContinental Hotels), Elaine Rodrigo (Kraft Foods), Susan Burrell (Standard Chartered Bank), Younghee Jung (Nokia UK)



Chaired by Karen Stanton (International Flavours & Fragrances)



Susan Burrell (Standard Chartered) & Graham Tocher (TNS)



Linda Foo (SinoTel)

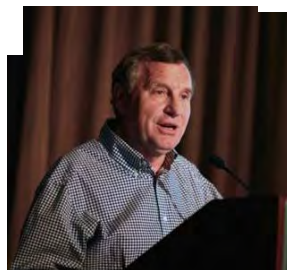


The best speaker award of \$1500 went to **Younghee Jung** Nokia UK. She kindly donated the \$1500 to a local children's charity.

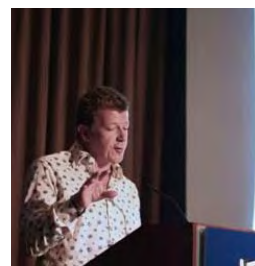
Speakers & Panelists



Organising Committee Chairman – Greg Coops



Keynote speakers –
Dr David Smith (DVL Smith Agency, UK)



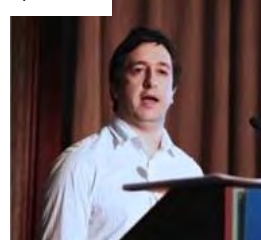
Andy Dexter (Truth (UK))



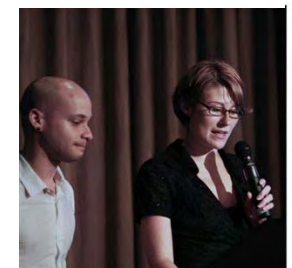
Robert Campbell, Y & R



Planners Panel - Rob Campbell (Y & R), Cherry Chan (BBH), Syu Ai Ming (Saatchi & Saatchi), Yvette Lim (Euro RSCG), Eric Chua (Bastes 141)



Craig Griffin (Mesh Planning)



Annie Auerbach (Flamingo, London) & Floyd Wood (Flamingo, Asia Pacific)

We thank our delegates for their support and feedback....



9 in 10 said Conference met needs and they would very likely attend another MRSS event...

"I really must congratulate you and the committee for a superb conference the contents, speakers, venue were first class, definitely on par if not better than the ESOMAR conferences I attended. Well done. Hope to attend the next one."
 Lee Yem Yeng, Insight Research (M) Sdn Bhd, Malaysia



"it's near perfect! Fantastic line-up of speakers.." Peggy Tan, ConsumerProbe, Singapore

"excellent mix of presentation(agency and clients) and panels and client presentations." Jerden de Koning, AQ Services International, Singapore

" well organised, time control is good. most speakers are good." Cheah Kim Lean, Acorn, Hong Kong

"We would love to have the chance to present a paper next year!" Tammy Ho, Synovate, Singapore

"The panel talk is helpful..... The non-researcher involvement is exciting."
 Tuong Tuan Thong, FTA, Vietnam

"it was very informative." R.K. Rao, E-Track, Malaysia

*"Hi everyone. Just wanted to drop a note to say **"Thank You"** for putting the MRSS Conference together. It is easily one of the better conferences I have attended. Shows you what researchers can achieve when we put our minds to it."*
 Raymond Ng, Saffron-Hill Research, Singapore

"Would really like to give you very well-deserved congratulations for a very successful endeavor! Your efforts truly are worth emulating from."
 Germaine A. Reyes, Synergy Business Consultancy, Philippines

And...the Workshops on 12 June.. – number of participants exceeded expectations



Workshop 1 – Exploring the world of online qualitative research – the quick think or the long think

Barbara Jones, Founder, Creative Catalyst Insights, Australia

36 participants



Workshop 2 – Using Semiotics to Unearth Fresh Insights

Ellen Baron, Director and Paul Merrell, Director ruby cha cha, Australia

42 participants

Both workshops rated 8 (out of 10) on Seminar overall, Content of Talk and Helpful in enhancing knowledge.

And the publicity...

One of the key objectives of the Conference was to raise the profile of market research and MRSS.

A total of 11 media stories were generated between 26 May 2008 and 25 July 2008. The coverage generated included 5 print newsclips, 2 radio interviews and 4 pieces of online coverage.

Print

| | | |
|----------------------------|--------------|---|
| Business Times – BizIT | 26 May 2008 | Market research conference from June 12 |
| AdAsia | 30 May 2008 | Market research conference |
| Straits Times Digital Life | 2 June 2008 | She designs Nokia phones Blurb about the following day's story in Digital Life |
| Straits Times Digital Life | 3 June 2008 | Connecting people – to better phones |
| Lianhe Zaobao | 14 June 2008 | Increasing number of SMEs engaging in market research |

Radio

| | | |
|-------------------------------|--------------|--|
| Radio Singapore International | 12 June 2008 | Youth futurist discusses the future of the web |
| Radio Singapore International | 19 June 2008 | The future of mobile phones: Design for use, Vision by relevance |

Online

| | | |
|-------------------|--------------|---|
| Businesstimes.com | 26 May 2008 | Market research conference from June 12 |
| Adasia.com.sg | 30 May 2008 | Market research conference |
| Straitstimes.com | 3 June 2008 | Connecting people – to better phones |
| Zaobao.com | 14 June 2008 | Increasing number of SMEs engaging in market research |

[as reported by Marie Ong of The Real Impact, MRSS' public relations manager for the Asian Research Conference.]

MRSS AGM 2008

The MRSS AGM for 2008 was held during a luncheon at the Camellia 1, Grand Hyatt Hotel on 27 June, 2008.

A total of 30 members attended the AGM.



Mrs Chong Lee Sah, President of MRSS, commenced the session with a run-down of the past year's and planned 2008 activities, followed by the 2007 financial statements.

The following events were highlighted: **MRSS Branding with a new logo and website**, increased publicity to MRSS initiatives, **Breakfast talks**, **Education Seminars**, **MRSS Newsletters**, MRSS participation in the **ESOMAR AP Conference** and **Research Day**, **Professional Standards Committee** and the **Interviewer Certification Scheme**.

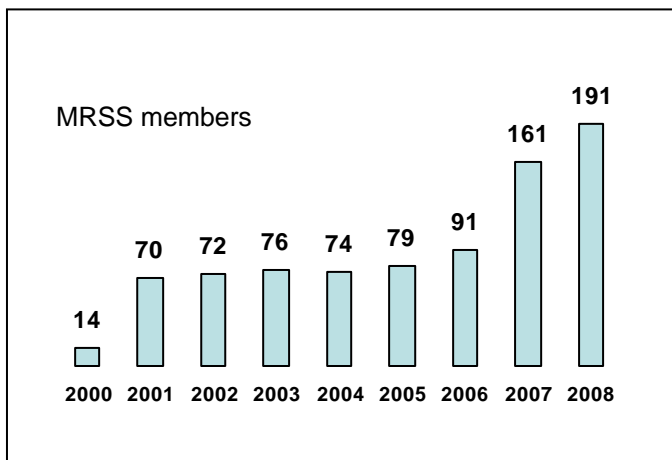
In particular, Lee Sah reported on the success of the **Asian Research Conference** which received tremendous support from research agencies, client organizations and MR associations in Indonesia, Malaysia, Philippines, Thailand, India, Vietnam, Japan and Australia. The event was reported in newspapers and radio channels.

The MRSS membership -

Corporate membership was introduced in 2007. As of June 2008, there are 191 MRSS members – an increase from 161 members in 2006.

- 152 from 25 corporate member companies
- 39 individual members

We continue to see an increase in membership from both research buyers as well as research agencies.



[abstract of AGM notes prepared by Melanie Ng (TNS), Secretary, MRSS.]



INFLATION A BOON TO SINGAPORE'S MODERN TRADE: NIELSEN
PRIVATE LABEL SALES REGISTERED SIGNIFICANT GROWTH IN LAST 12 MONTHS
CONSUMERS INCREASINGLY RECEPTIVE TO FROZEN FOOD PURCHASING

Singapore, June 4, 2008 – In the face of mounting day-to-day living costs in the wake of rising inflation, a growing number of consumers in Singapore are adjusting their food and grocery consumption, and turning to lower-priced alternatives, and according to Nielsen, it is the major grocery retailers who are benefiting – by raking in higher sales, specifically in the fresh/frozen food category, as well as their very own Private Label items.

“Findings from various Nielsen studies confirm that many cost-conscious consumers in Singapore are switching to cheaper alternatives of their regularly consumed household groceries,” commented Ms Ooi Pin Pin, Retailer Services Associate Director, The Nielsen Company, Singapore and Malaysia. “We are seeing significant signs that consumers are tightening their belts – via the corresponding, substantial growth in Private Label products.”

Nielsen's Retail Index tracking reflected surges in overall growth of Private Label sales over three six-monthly periods. Compared to the previous six months timeframe ending April last year where registered growth was negative, the May to October period saw a huge jump of 8.7 percent growth in Private Label sales, and a further 14.3 percent hike in the following six months. (Chart 1)

“In the past, growth of manufacturers' brand typically superseded that of Private Label. However, our findings from the past 12 months have shown steep acceleration in the growth of Private Label, bucking this long-standing trend,” said Ms Ooi.

Besides switching to supermarkets and hypermarkets' own brand of household products and groceries, Singaporean shoppers are also increasingly turning to the modern trade in search of cheaper fresh food items. Findings from Nielsen Homescan[®] show that wet markets, which have been a favourite source of fresh food among consumers, are losing their share of customers and wallets. Although still the most popular channel patronized by more than half (57%) of fresh food buyers, a significant proportion of wet market go-ers are now heading for supermarkets and hypermarkets, resulting in a drop of seven percent in shoppers' spend at wet markets last year, and bringing corresponding increases in shoppers' spending on fresh foods at supermarkets (4%) and hypermarkets (2%). (Chart 2)

Further validation of this trend are results taken from the 2007 Nielsen ShopperTrends survey, where shoppers were asked where they purchased various types of fresh food items—specifically fruits, vegetables, seafood, and meat. While wet markets saw declines in shoppers' purchases across all of these categories, it was the supermarkets that registered the biggest gains. In particular, fresh meat saw the biggest jump, with 15 percent more shoppers this year claiming to get theirs from the supermarket. (Chart 3)

“With frozen meat costing notably less than fresh, coupled with the government's recent promotional campaign encouraging Singaporeans to make the switch to frozen meat, and the fact that large retailers have upped their efforts in improving their offerings in this area—we are seeing quite a considerable level of conversion,” noted Ms Ooi.

Store Choice for Food and Grocery shopping

Nielsen ShopperTrends also surveyed shoppers on the factors that affect their decision on store choice for food and grocery shopping.

Convenience and *Value for Money* continue to take the top two ranks. When compared to last year's survey, three factors—*Easy to find what I need*, *Everything I need in the one shop*, and *Attractive and interesting promotions* -- have increased in importance, taking the third to fifth placing from their previous seventh, tenth, and eighth positions in 2006. (Chart 4)

“These latest developments exemplify the hectic lifestyle and increasing sophistication of today's modern

shoppers. Based on Nielsen ShopperTrends' established Top 5 factors influencing grocery store choice, we can summarize that today's shoppers want a convenient and accessible one-stop shop that is able to provide value-for-money shopping and attractive promotions," commented Ms Ooi.

According to Nielsen Advertising Information Services, the local advertising share of spend in the supermarket/hypermarket category has been steadily increasing, with a steep jump of S\$12 million from 2006 to 2007. Last year, all the major retailers invested a total of over S\$43 million in advertising alone. (Chart 5)

About Nielsen ShopperTrends

ShopperTrends is an annual face-to-face survey designed to provide an in-depth understanding of consumer shopping patterns across different trade sectors, from hypermarkets and supermarkets to traditional wet markets and mom and pop shops. It provides information on where, when and how often people visit different outlet types, how they perceive the key retailers, and provides insights into key aspects of shopping behaviour. The latest survey, conducted in September to November 2007, polled shoppers in 55 markets from Europe, Asia Pacific, North America and the Middle East. 1300 interviews were conducted in Singapore.

Chart 1

Housebrands gained consumer offtake in latest year, with growth accelerating in the last 2 half-yearly periods

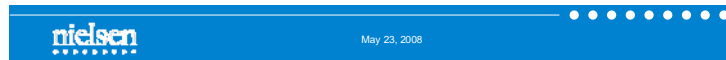
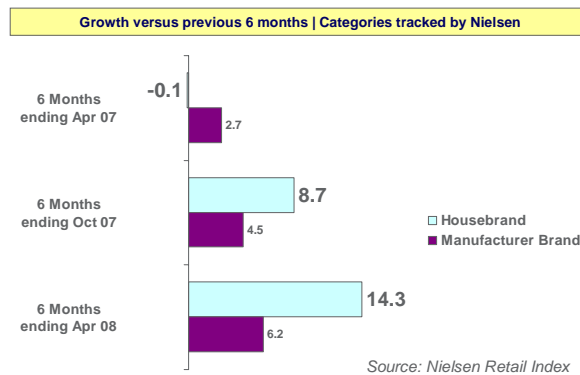


Chart 2:

Wet Markets losing share of trade to Supermarkets and Hypermarkets, but still accounts for more than half the share of Fresh food

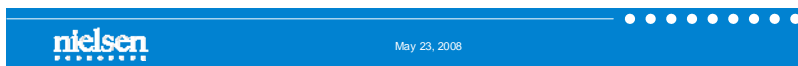
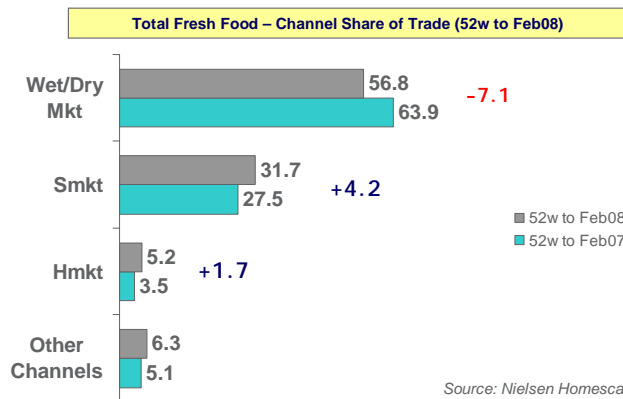


Chart 3:

A significant proportion of wet market go-ers have switched to Supermarkets and Hypermarkets

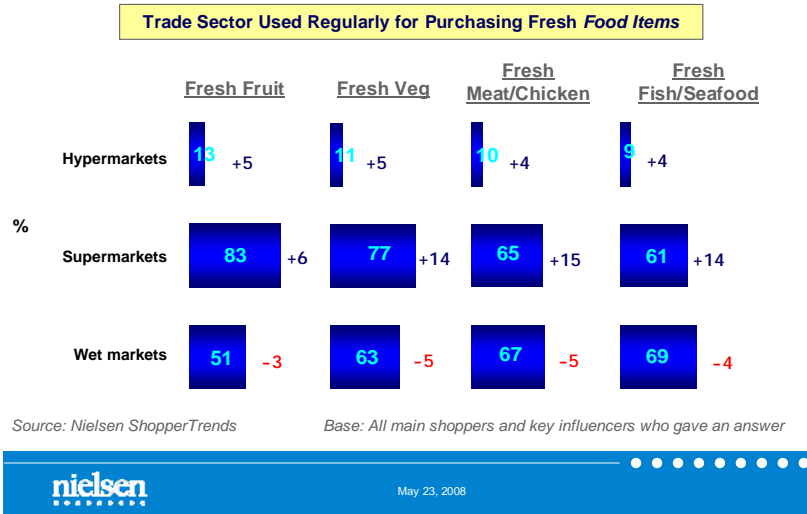


Chart 4:

3 most significant increases in importance in 2007: Easy to find what I need, Attractive and interesting promotions, Everything I need in the one shop.

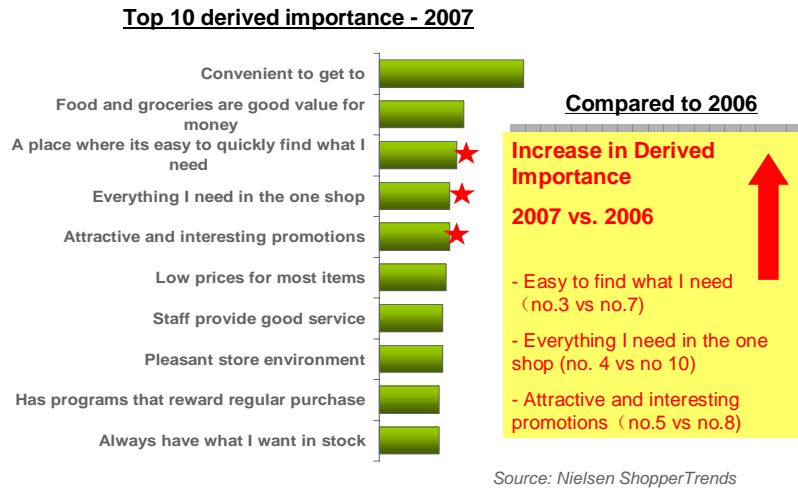


Chart 5:

| Advertising spend by Singapore Retailers Grand Total | 2005 | 2006 | 2007 |
|--|------------|------------|------------|
| | 32,819,399 | 31,033,399 | 43,556,621 |



CURIOSITIES

> Mirror, mirror on the wall... The highest daily mirror time goes to the Bulgarians with 31% spending more than 10 minutes a day gazing at themselves, followed by the Americans at 26%.

> Singaporeans relate beauty to confidence more than any other market, with just under half saying it's all about self-belief.

> 41% of all respondents agreed that they pay attention to beauty tips in magazines.

> It's good to be beautiful in Brazil and India where 55% of people think you can get away with less work as long as you look good.

> Were money no object, nearly half of all people would have regular facials, massages or other treatments. This was as high as 77% in Brazil (91% of women) and 72% in Spain (86% of women).



Global survey: What would you do to be beautiful?

Beautiful things give us great pleasure. Art, music, landscapes... it goes without saying. But where do we stand on beautiful people? It's a tougher proposition because, frankly, we're not all 'Brangelina' or Aishwarya Rai. Of course many of us would say people are beautiful within.

Synovate tackled a range of beauty issues in a global survey... how do people define beauty? Where do people from different cultures see themselves on the beauty scale? And would they want to do anything to change their looks? Over 7,000 people in nine markets across the world spilled their beauty secrets and here's what they told us...

A mixed beauty bag

Two thirds of all people say that beauty is primarily about non-physical attributes, yet as many as 40% would change their looks if they could, according to Synovate's global survey on beauty.

Beauty is as beauty does

While much of the survey was about beauty-on-the-outside, Synovate started by asking respondents to define beauty, with two thirds of all people choosing a definition about something other than appearance. Overall, 35% attribute beauty to 'what's on the inside' and another 32% say it's all about confidence. So which nations are moved more by appearance?

Don't go changing

Not everyone can actually be beautiful but culture, gender and confidence influence whether you think you are. Synovate asked respondents to place themselves on the beauty continuum, anywhere from 'I am beautiful and do not need to change anything about the way I look' through to 'I do not think I am beautiful or attractive and want to change the way I look'.

So who's hot and who's not?

It's a kind of magic

Nearly half of all people think beauty advertisements make women feel inadequate; and 28% agreed beauty advertisements do the same for men, according to the survey. Most likely to feel lacking when viewing ads were Canadian women at 74% and Brazilian men (50%).

Putting your mouth where your money is (and other things people will do to improve their looks!)

When you think plastic surgery, it's hard not to think Hollywood and the United States of America. Think again. While the number of people in the States who would consider plastic surgery (if money was no issue) was quite high, it was eclipsed by the Brazilians. More than four in ten Brazilians would have plastic or cosmetic surgery if their wallets allowed, rising to nearly 60% among Brazilian women.

About the Synovate global beauty survey

Synovate spoke with over 7,000 adult consumers in nine markets around the world - Brazil, Bulgaria, Canada, India, Korea, Singapore, South Africa, Spain and the United States of America. The study was conducted in May 2008 using online, telephone and face-to-face methodologies.

COMPANY NEWS

Driving Growth recently opened an office in Singapore, managed by **Shona Ivens**, formerly head of International Services at Ipsos (based in the UK and China). Shona also has experience with Research International in Hong Kong and TNS in London. Driving Growth is a marketing insight and planning business founded by marketing consultants and market researchers to help clients achieve organic growth, delivering practical insight and marketing solutions to profitably change customer behaviour.

The Singapore office allows Driving Force to offer an 'on the ground' service to their Asia Pacific clients. For more information - please contact Shona on +65 9452 6588.

GMI Doubles the Size of its Singapore Consumer Panel

August 8, 2008 - GMI (Global Market Insite, Inc.), a leading provider of global market intelligence solutions with regional Asia-Pacific headquarters in Sydney, Australia, today announced it has increased the size of its Singapore consumer panel from **40,000 to 85,000** double opted-in members. GMI's new premium Singapore panel offering is uniquely positioned to provide market research professionals with insights into all kinds of consumer opinions from Singapore, from new concepts to new products and services, in real time. It addresses the growing domestic and international demand from small- to medium-size firms all the way to larger industry players for online consumer research in this sophisticated and highly competitive market. Total market research spend in Singapore reached US\$55 million in 2006, 16 percent of which was spent online, ranking Singapore 8th out of the world's top 10 countries with the highest online research spend (ESOMAR, 2007 Global Market Research Report). "With internet penetration now reaching over 50 percent of Singapore households, and 65 percent of all Singapore research being conducted with consumers in 2006, we felt the need to combine our panel recruitment methodologies to offer a more representative mix of online- and offline-minded consumers that better reflects the attitudes and opinions of the Singapore market," explains Ludovic Millet, GMI's managing director for the Asia-Pacific region. "To complement our standard online panelist recruitment campaigns, we work with an exclusive local tier-one partner which recruits Singapore panelists based on their offline shopping behavior throughout 600 Singapore outlets." In addition to age, gender and household income, the ethnic distribution of GMI's highly profiled Singapore consumer panel is in line with the Singapore Census data, enabling researchers to gain a perfect representation of Singapore when seeking consumer opinions, and gather valuable intelligence for enhanced marketing efforts in this market.

This issue is put together by CLS Research Solutions