

MRSS Newsletter

May – June 2009

Asia Research Conference Returns

The Market Research Society Singapore and its members have marked their calendars for the return of the Asia Research Conference for **August 13-14 2009**. Despite uncertain times in the business realm a poll of member companies confirmed the interest and need for an industry platform to share ideas, network and illustrate to clients that the role of research has never been clearer. The enthusiasm and support of last year's event have further encouraged the society to provide this platform again in 2009.

The New Research Framework theme for this year's conference takes these troubled times head on, by addressing the evolving needs of both clients and researchers in an ever-changing landscape.

The event kicks off on Thursday August 13 with two half-day workshops. The full-day conference then follows on Friday August 14.

The speaker line-up is well underway with heavy hitters from both the United States and the United Kingdom. **Bob Johansen**, famed sociologist from The Institute For The Future in Menlo Park will give a live presentation and Q&A remotely from the US. While both **Marco Bevolo**, formerly the head of design at Philips and now a well known author and speaker as well as **Sheila Keegan** an award winning researcher, speaker and author will join us from the UK here in Singapore for the regional event.

Come be a part of this exciting affair by speaking, sponsoring and attending the workshops and conference on August 13 – 14, 2009.

To get involved, please contact Theresa_wong@mrssingapore.org.sg

See you in August!

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MRSS AGM 26 June

The MRSS AGM 2009 will be held on Friday 26 June; over lunch at the Hyatt Hotel.

Notice of the AGM, together with nomination papers for the 2009 – 2010 Committee, will be sent to all members by 12 June. Please attend the AGM and cast your Vote.

People and Company News

JANE NG has joined Coca-Cola Singapore as Associate Knowledge & Insights Manager. Jane joins Coca-Cola from Millward Brown where she spent 5 years specializing in brand equity studies and copy testing. At Millward Brown, she has led multi-country projects for regional clients like Unilever, Nestle, Levi Strauss and Kimberly Clark. This has given her a vast understanding of consumers in Asian markets across a wide array of industries. In her new role, Jane will work closely with the brand & commercial teams – integrating consumer, trade & shopper insights into brand plans.



Talent Pool

In response to growing demand, Asia Talent is launching a service called "Talent Pool".

Talent Pool is simply that, a collection of talented experienced researchers, operations and technical support people skilled at what they do and able to assist in "overload" situations.

Researchers are all at Associate Director level and above, capable of interpreting data, preparing reports, and presenting findings. These are insightful researchers in the interpretation and reporting of output, each is very proficient in written and spoken English, all are able to work remotely, effectively and efficiently.

Operations and Technical people have vast experience at Manager level and above, capable of working on single situation and multiple needs requirements. Their expertise covers all aspects of operations, technical support and training, software implementation, modification and transference.

Talent Pool people are available on a casual or contract basis - as needs require. Beyond solving the "overload" scenario, they are available to participate in conference calls, attend meetings and presentations and, if necessary, contribute at presentations. Alternatively, they can operate remotely, from anywhere in the region to service requirements anywhere in the region.

BRANDZ™
ECONOMIC DOWNTURN?
CHINA BRANDS ON THE RISE


CHINESE brands are thriving despite the global financial recession. Four of the Top 10 Asian Brands are China-based - one mobile operator (China Mobile), three banks (ICBC, China Construction Bank, and Bank of China). Across the globe and all categories, this year's biggest climber is China Merchants Bank with an impressive 168% increase in brand value. This massive growth is attributable to China Merchants Bank's focus on innovative customer service techniques, growing credit card business, flexibility for business users, and superior online banking service.

Within the Asian region, Chinese and Japanese brands remain the strongest - they occupy all 10 seats in the Asian Top 10. Although the value of the Asian Top 10 has marginally declined (2%) because of the drops seen by Japanese automotive brands, the Asian Top 10 are all proud members of this year's BrandZ Top 100 Most Valuable Global Brands.

Globally, Google sits at the top with an astounding brand value of \$100 bn, Microsoft is second at \$76.2 bn, and Coca-Cola enters the top three echelon for the first time at \$67.6 bn. This year, the Global Top 100 has managed to hold its value at \$1.95 tn (a marginal increase of 1.7%).

What is BrandZ?

Developed for WPP's operating companies by Millward Brown Optimor, the BrandZ Top 100 Most Valuable Global Brands ranking enters its fourth year in 2009. The BrandZ study, commissioned by WPP and conducted annually by Millward Brown, measures the brand equity of thousands of global "consumer facing" and business-to-business brands, and has interviewed over 1 million consumers globally. Consumer perception of a brand is a key input in determining brand value because brands are a combination of business performance, product delivery, clarity of positioning, and leadership.

TOP 10 ASIAN BRANDS			TOP 10 GLOBAL BRANDS	
Rank	Brand	Brand Value \$M	Brand	Brand Value \$M
1	China Mobile	61,283	Google	100,039
2	ICBC	38,056	Microsoft	76,249
3	Toyota	29,907	Coca-cola	67,625
4	China Construction Bank	22,811	IBM	66,622
5	Bank of China	21,192	McDonald	66,575
6	Nintendo	18,233	Apple	63,113
7	NTT DoCoMo	15,776	China Mobile	61,283
8	Honda	14,571	General Electric	59,793
9	Nissan	10,206	Vodafone	53,727
10	Canon	8,779	Marlboro	49,460

The BrandZ Top 100 ranking provides the following:

- Brand Value - expressed in dollars
- Brand Contribution - an indication of the brand's effectiveness in driving business earnings. This is expressed as an index from 1 to 5 (5 being high).
- Brand Momentum - the index of expected short-term brand growth. This is expressed from 1 to 10 (10 being high).
- Brand Value as a percentage of market cap - due to the dramatic fluctuations currently being experienced in the financial markets, we have chosen to express this calculation for the financial institutions and insurance categories instead of momentum.

Key Trends for 2009
Value

Consumers want value - a composite of quality and price. They aren't looking for the cheapest; they are looking to get their money's worth. The retail, apparel and fast food categories are reaping huge benefits from the increasing importance of perceived value. In the retail sector, ALDI is new in the Global Top 100 this year with a brand value increase of 49%. In the apparel sector, H&M (+8%) has overtaken Nike to become the number one apparel brand in the world. The fast food category is also doing well as meals which offer value, comfort and convenience become an increasingly attractive proposition in the current economy.

Vice

Although people are tightening their belts along with the tightening of money, they continue to reward themselves with little treats. Consumers choice vices are fast food (McDonald's +34%), cigarettes (Marlboro +33%) and alcohol (Budweiser +23%; Johnnie Walker +42%). A noteworthy point is that consumers are factoring health into their selection of vices. Bud Light is now the number one brand in the beer category, and McDonald's growth is directly attributable to their introduction of healthier options and the coffee shop format.

Homeward

With money being a crucial factor in choices, home-based consumption has escalated. This trend has spurred a surge in the popularity of home entertainment gaming console brands such as Nintendo, which has leaped into the Global Top 100 for the first time this year at no. 32. Similarly, consumers are patronizing coffee houses less frequently and instead opting to purchase premium coffee to brew at home - resulting in the spike in the value of coffee brands like Nescafe (+23%) and Nespresso (+27%). The retail sector has also enjoyed growth, especially among online shopping sites such as Amazon (+85%) and eBay (+16%) as more people are now choosing to shop from home.

Wireless

Thanks to wireless technology, consumers enjoy connectivity whether they are at home, work, or on the move. This year, the mobile operator category (+ 28%) has seen the greatest growth, and seven of the Top 10 Global Brands are from the technology and mobile operator categories.

Growth is driven by data usage, particularly through the use of the iPhone and BlackBerry. BlackBerry's brand value continues to increase (100%) as it successfully captures the consumer market in addition to the business market. BlackBerry's introduction of the BlackBerry Storm with touch screen capabilities has allowed the brand to engage in head-on competition with the iPhone.

Interesting New Brands for 2009

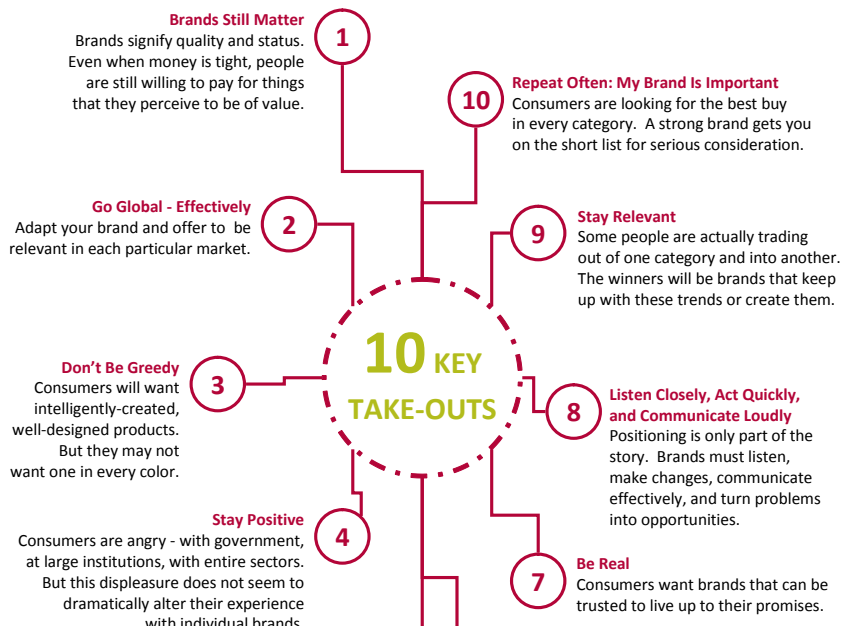
There are a total of 15 new brands in this year's Top 100. The new entrants come from a wide range of categories - proving that it's possible to build a valuable brand in any category even during this time of recession. Pampers is the highest entrant at no. 31, followed by Nintendo (no. 32) and VISA (no.36). Pampers has effectively leveraged on technology by enlisting top "mommy bloggers" to spread awareness and value of Pampers and other baby care brands. Pampers has also maintained its strong brand image by coming up with innovations such as Caterpillar-Flex which improves the comfort and fit of their diapers. VISA's entrance into the Top 100 is a result of the biggest IPO in history, while Nintendo's success is due to the Wii and DS.

What's Next?

Many global and Asian brands are surviving, even thriving, in spite of the current economic downturn. Consumers are still spending money, and brands that align themselves with consumers' spending trends have enjoyed remarkable growth.

The Asian Top 10 has remained remarkably constant this year - a reflection of the enduring power of a strong brand.

Chinese brands are on the rise while Japanese brands remain strong. Looking at the growth of the BRICs and the success of Chinese brands, will 2010 see Indian brands stepping up their game and making their way into the BrandZ Top 100 Most Valuable Global Brands?



Free from my husband or partner when it comes to money, say Singaporean women

Thirty-six percent of Singaporean women believe that financial independence is about being able to stand on your own without depending on your husbands or partners for money while over a quarter (26%) agreed that financial independence was about living without debts, according to a recent survey by global market research company Synovate.

Exploring the attitudes of women towards financial success and the barriers to achieving them, Synovate surveyed over 4,000 respondents from Singapore, Malaysia, Indonesia, Brazil, Bulgaria, France, Canada, Mexico, South Africa, Australia, the UK, the Netherlands and the US as part of a global 'Women & Financial Independence' survey.

Singaporean women went on to say that financial freedom equalled purchasing power which allowed them to buy the things they wanted without having to worry about the cost. Eleven percent said that it was about the ability to stay at home without working if they wanted to.

The survey also compared views of women from other nationalities and found that over half of French, English, Dutch and American women defined financial independence as standing on your own without depending on a husband or partner for money. French and British women also stood out among all respondents as being the most financially independent.

"The survey clearly reveals a sense of financial awareness among women. In fact, 67% of Singaporean women admitted that they are more responsible with money than men. Knowing what and where they are on the financial ladder will certainly help them overcome financial barriers ahead," said Miranda Cheung, Managing Director of Synovate Singapore.

For a rainy day

The survey showed that Singaporean women also believe in the importance of sticking to a budget as well as saving and putting aside money every month. It found that over three quarters use a savings or current account while 13% have access to a priority banking account.

Twenty-eight percent also acknowledge that a portion of their monthly incomes are set aside for fixed deposits while 16% contribute part of their income towards mutual funds and unit trust.

"In spite of the present economic uncertainties, Singaporean women are taking steps to manage their finances and this is reflected in their usage of financial services. Banks and financial institutions in the country would also be pleased to know that over three quarters (71%) of Singaporean women said that it was important to know about financial products and services," she added.

Winning a million

The survey hypothetically asked Singaporean women what they would do if they had won a million dollars. It found that close to half (44%) said that they would go for a great holiday.

Thirty-eight percent said that they would buy a house or pay off their existing mortgage while the same percentage said that they would give the money to their parents or children. Thirty-two percent of Singaporean women would donate some of the money to charity while 12% would invest it in financial products. Surprisingly, only 8% of Singaporean women said that they would use the money to buy designer and branded goods.

"It's clear to see that Singaporean women have reached a level of financial maturity and self-reliance when it comes to improving their chances for financial independence. Singaporean women are also optimistic with over three quarters (77 %) being positive about their future lifestyles including their social status, money and careers," Ms. Cheung added.



TNS REVEALS ASIA'S DIGITAL TOP BRANDS

A study about online brand presence, persuasion and trust

The second annual Digital Media study jointly published by TNS and Media magazine reveals the brands whose digital presence and persuasion is strongest in the minds of consumers across Asia.

In Singapore, telecommunication companies Singtel, Nokia and Starhub are leading the ranking. Among the brands that dominate the top positions in Asia are:

1. Nokia - top in Thailand; amongst top four in Malaysia, Singapore, China and Hong Kong
2. Nike – top in Hong Kong and in top four in China and Taiwan
3. Coca-Cola – amongst top three in China and Taiwan
4. KFC – top in China and among top five in Malaysia and Taiwan
5. McDonald's - in the top five for Taiwan, Hong Kong and Singapore

The top five digital advertisers ranked in order of awareness are:

Ranking	Hong Kong	China	Taiwan	Singapore	Malaysia	Thailand
1	Nike (69%)	KFC (80%)	7-11 (76%)	Singtel (71%)	Air Asia (90%)	Nokia (90%)
2	HSBC (69%)	Coca Cola (77%)	McDonald's (75%)	Nokia (66%)	Nokia (76%)	Sony (78%)
3	Cathay Pacific (67%)	Nike (76%)	Coca Cola (65%)	Starhub (66%)	DiGi (76%)	Toyota (73%)
4	Nokia (67%)	Nokia (75%)	Nike (63%)	Citibank (65%)	Maxis (75%)	Samsung (73%)
5	McDonald's (67%)	Li Ning (69%)	KFC (63%)	McDonald's (64%)	KFC (72%)	Honda (72%)

Looking at the persuasiveness of digital media, 83% of people in Asia indicated that it has increased their level of interest in using the brand. This compares to more than three-quarters (78%) in Singapore. Specific brands in Singapore that have managed to increase *interest* in using the brand somewhat are Sony (94%) and KFC (90%), of which KFC managed to have increased interest significantly amongst 40%.

Anne Woodhams, TNS Regional Manager and expert on Branding & Communications comments on the results for Asia: "What is interesting to see is the difference between digital advertisers that achieved the greatest reach and those which are not so widely seen but are relatively more motivating. KFC, 7-Eleven and Adidas are 'punching above their weight', topping the ranking in persuasiveness in Singapore, despite the fact that technology sector companies Singtel, Nokia and Starhub achieved the greatest visibility through digital."

The study further reveals that dedicated websites (53%), sponsored content (50%), banner ads (46%) and pop-up ads (39%) are recalled most commonly by consumers in Asia as types of media that the brands use. The results are similar for Singapore, although Singaporeans mention email more often (45%) as a type of digital media that is used by brands compared to people in Asia as a whole (29%).

The most trustworthy form of communication remains recommendations from friends and family (54%). However, consumer generated media is emerging; next in line as trustworthy forms of communication are online expert product reviews (28%), independent reviews in publications (25%) and online consumer reviews (22%).

In Singapore, 46% trust recommendations from friends and family most, whereas trustworthiness of online expert product reviews (30%) and independent reviews in publications (26%) are trusted forms of communication as well.

At the bottom of the ranks of consumer credibility in Asia remain emerging digital formats such as ads in video games (54% does not trust), ads in virtual worlds (44% does not trust) and ads via mobile handsets (44% does not trust), as these are the forms of communication that are *not* trusted. Ads in video games and virtual worlds are not much trusted in Singapore as well (both 44% does not trust). Nor are ads via mobile SMS (34% does not trust) much trusted and in addition, Singaporeans do not trust popup web ads (42% does not trust).

Bernice Klaassen, Head of Interactive TNS Singapore & Hong Kong says: "Singaporeans trust information they get about brands and products from independent experts and other people like themselves *more* than information they get from traditional advertising. This is why Social Media, like review sites and blogs, have become such an important source of information for consumers, having a major influence on the products and brands they buy in the end. For any company, it has become crucial to monitor and understand what consumers are saying about their products and brands online, so they can act effectively upon this feedback".

GLOBAL CONSUMERS OPT FOR LOCAL FARE WHEN DINING OUT, LATEST NIELSEN STUDY REVEALS SATURDAY EVENING DINING MOST POPULAR FOR MAJORITY OF SINGAPOREANS

If you are a Singaporean who frequently dines out, there is a good chance it will be a dinner occasion with friends or family on a Saturday night, according to the latest Global Online study by The Nielsen Company. According to Nielsen, the most common out of home occasion is an *evening* event for almost eight in ten (78%) Singaporeans, and for one in two (48%), Saturday night is the most popular evening out. (Charts 1 & 2)

“Singaporeans lead a relatively hectic lifestyle, and for many, the only time they can find to enjoy a leisurely dinner is on the weekend, and Nielsen’s findings show that Saturday is the most popular day of the week for this,” commented Joan Koh, Executive Director for Consumer Research, The Nielsen Company Singapore.

When choosing a restaurant, two main factors affect the choice of restaurant global consumers prefer to patronize. In Singapore, half the respondents (57%), say they are most likely to base their choice of restaurant on the type of cuisine served. At the same, many local diners are also on the look-out for reasonably-priced food (55%). (Chart 3).

“Singaporeans are both food lovers and bargain-hunters - judging by the plethora of dining deals offered by credit card companies which have proven popular for many restaurant goers, who often choose their dinner venue based on the availability of an offer,” noted Ms Koh.

“In fact, Singaporeans (14%) topped the rank globally for citing special offers/promotion as one of their main consideration for choosing a restaurant,” she added. (Chart 4)

Asked what their favourite fare was when dining out, consumers the world over said their preference was for local cuisine (27%), while traditional international favourites Chinese and Italian were close runners up (26% and 17% respectively). The only exceptions were Singaporeans, along with the Australians, who nominated Chinese as their favourite cuisine above their local fare; although preferences in Singapore are likely driven by ethnicity, with Singapore’s population made up of 75 percent Chinese. (Chart 5).

The majority of global consumers (44%) dine out between one and three times per week, although as many as 38 percent only enjoy a meal out-of-home once a month or less. Consumers in Asia Pacific dined out more frequently than consumers in other regions. In Singapore, over two in five (44%) dine in restaurants weekly, at least. (Chart 6)

“The frequency of out-of-home dining in different countries very much reflects local cultures,” observes Ms Koh. “Many Asian countries place emphasis on out-of-home socializing, and it is fairly common for celebratory meals to take place in restaurants. Nowadays, we often see restaurants packed, and with queues forming at the entrance on special occasions like Chinese New Year, and Christmas. With many Singaporeans, dining out has become a tradition of its own!”

In Asia Pacific, consumers were most likely to enjoy a restaurant meal with family and friends (58%), while a further 21 percent said they most often dined out with their partners. For seven in ten (69%) Singaporeans, the most common dining companion are family and friends. Another quarter (24%) of local respondents dines out most often with their partners. (Chart 7)

Chart 1

What meal do you usually eat at a restaurant?

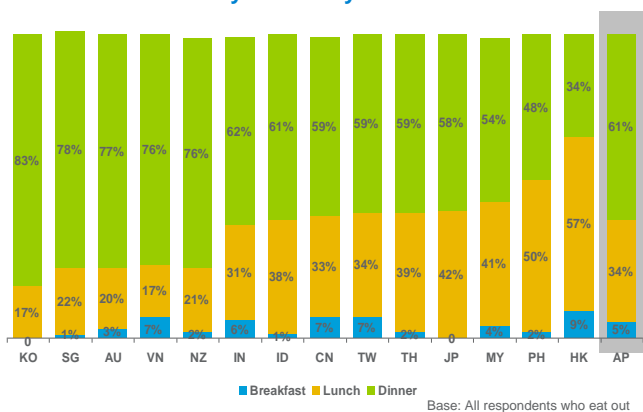


Chart 2

On which day of the week do you most often eat at a restaurant?

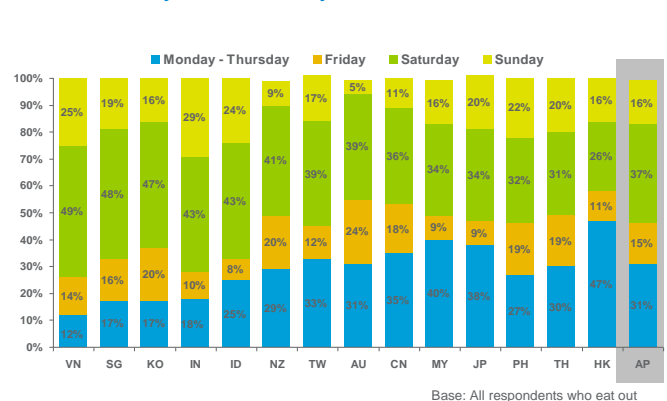


Chart 3:

What are the two main things Singaporeans consider when choosing a restaurant?

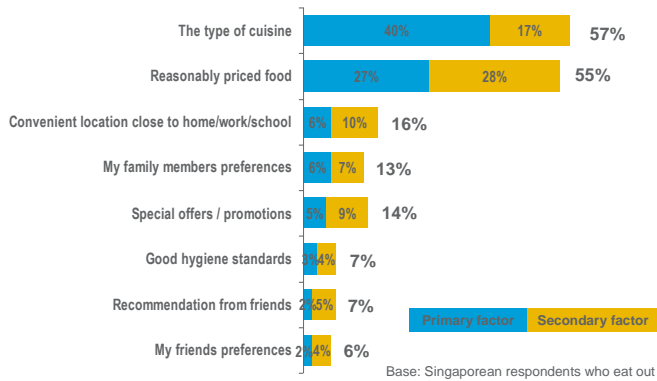


Chart 4

Top 10 countries globally which cited Special offers/Promotion as among the two main factors to consider when choosing a restaurant to dine at

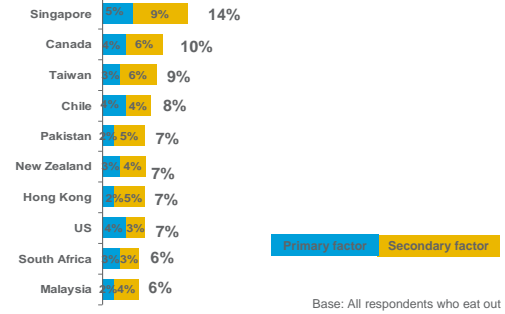


Chart 5

What kind of restaurant cuisine do Singaporeans most prefer?

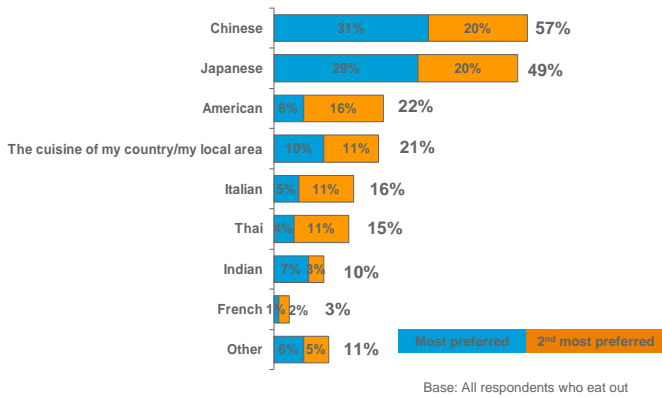


Chart 6

How often do you eat at restaurants? Singapore Vs Asia Pacific

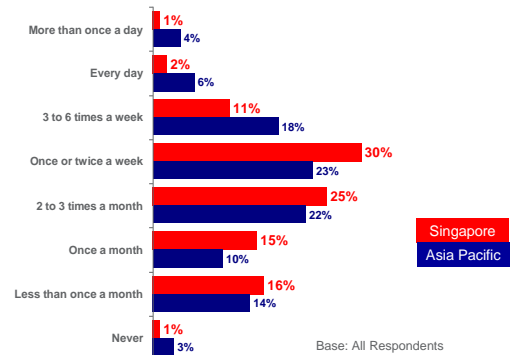
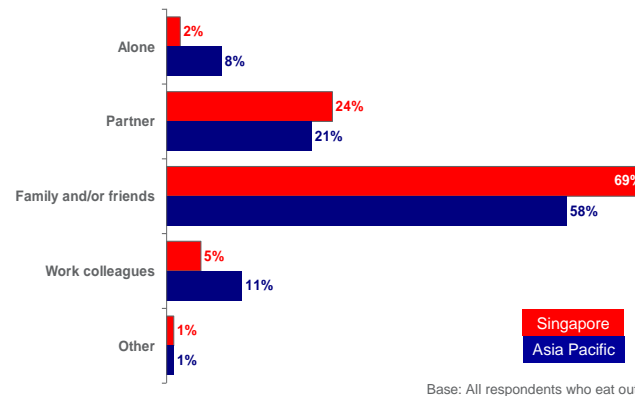


Chart 7:

Who do you most often go to a restaurant with? - Singapore Vs Asia Pacific



Panel quality: Leveraging interactive techniques to engage online respondents

Download full report from GMI web site for free, please click [here](#)

Or URL <http://www.gmi-mr.com/contact/register.php?id=217>

Background

In 2008, GMI and Engage Research conducted and published a study exploring what happens to respondents who get bored while participating in online surveys. The research examined what causes respondent boredom, how this boredom affects the data collected, and explored some solutions to these problems.

Summary of preliminary research findings

Drop-out

- In a typical 20-minute online survey, up to 40% of respondents could drop out because they are bored or not interested in answering the questionnaire.
- Many of the traditional question formats in online surveys were viewed by respondents as dull and frustrating to complete.
- The question types most associated with drop-out are grid questions, multiple-check questions and drop-down menus, all exacerbated by repetition.

How responses change as respondents get bored

Our research revealed how boredom has a significant impact on the quality of data collected with online surveys. We measured response patterns at different points within a 15-minute survey, and observed the following:

- A 38% increase in straight-lining patterns
- A 40% decline in responses to open-ended questions
- Up to half of respondents not reading instructions properly

The solutions

In exploring the solutions, we looked at the impact that visuals and animations could have if added to an online survey. We measured the value of a more fluid and efficient surveying platform that could background-stream content, and used features such as auto-nexting to allow respondents to progress through an online survey more smoothly.

We were able to demonstrate that these changes could reduce respondent drop-out rates by up to 75%. We also discovered that by making questionnaires more engaging, we also collected better-quality data and higher volumes of data. We developed and tested new alternatives to the traditional grid questions, and found these to deliver more robust and consistent data, as well as improve survey completion rates by making them more interesting.

The research highlighted that data collected online is hugely influenced by the engagement levels of respondents. Human interviewers are adept at engaging respondents, and there are standardized models of behavior when being interviewed by a human that are easily bypassed online. *Download full report from GMI website for free, please click [here](#)*

Latest research

The most recent research we have conducted relates to techniques that could further improve online engagement levels, including designing surveys to maximize the amount of feedback that can be gathered from respondents. Ultimately, we wanted to see whether online research had the potential to deliver the richness of feedback that you would expect from qualitative approaches, and how we might use online approaches at more qualitative and exploratory stages of research.

This paper is a summary of our findings on the most effective ways to engage respondents to maximize return on research investment via online surveys.

Ways of maximizing the responses from online respondents

Here are the areas we have explored in our research:

- The role and value of imagery and animation in online surveys
- Improving standard question techniques
- Role playing
- Implementing social influence techniques and setting firmer expectations for respondents
- The potential of energizing techniques
- The impact of improving the basic language of survey questions
- How sharing opinions can stimulate better responses
- Choosing the right platform to conduct online research

1. The value of using imagery and animation in online surveys to engage respondents

Using imagery and animation in surveys, when done the right way, can have a very powerful impact on both improving attention levels and the quality of feedback you get from respondents.

2. Improving standard questioning techniques

Our previous research highlighted the impact that improvements to questioning approaches could have on enhancing the data and respondents' enjoyment levels of participating in online surveys. By switching away from standard grid question formats, for example, we found that we could reduce straight-lining effects by up to 80%, and increase respondent enjoyment levels from scores of three out of 10 to scores of eight out of 10.

3. Role playing

Role playing is a standard projective research technique, used normally in qualitative research to explore subconscious feelings and perceptions. We wanted to look at how it could be used in more everyday research situations to encourage more active respondent participation in online surveys.

4. Implementing social influence techniques: Setting firmer expectations for respondents

Psychologists have revealed through numerous pieces of research that people's behavior is very strongly led in social situations by what other people do. Once other people have established a norm, we are more likely to comply with that norm.

5. Using survey energizers

For this technique, we have to thank Leon De Koning, GMI's Sales Director for Northern Europe, whose wife is a teacher. He observed that it is common practice in Dutch schools to break up long lessons with a completely unrelated and preferably fun activity every 20 minutes or so. The technique is called Energizer breaks.

6. Improving the language used in online surveys

The next area we examined was how some subtle changes to the wording of online survey questions could improve the quality of responses.

7. Allowing respondents to read and evaluate other respondents' comments

You only need to see the growth of social networks and blogging sites to realize that making comments and reading other peoples' thoughts and opinions is at the heart of the success of the Internet. It is what a lot of people like doing, and is probably the reason why many people have signed up to online survey panels in the first place.

8. Choosing the right platform to conduct online research

There are clear technical constraints in delivering many of the solutions presented in this paper from many of the current online survey providers' offerings. We have highlighted that adding imagery and animations engages respondents and delivers better data.

Summary / Conclusions

In this paper, we have hopefully demonstrated that if you move up a gear in the effort you make to engage online respondents, the investment can deliver significant returns.

We have found that with the right engagement techniques, 50 respondents can deliver the same volume of feedback as 350. You can encourage them to write paragraphs instead of sentences, think harder, engage their imaginations and get them to take part in a sequential series of research studies.

All of a sudden, online emerges as a platform for more qualitative research.

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