MRSS Newsletter

February – March 2010

MRSS Events 2010

Breakfast Talks

18 March Breakfast Talk
"The MRSS Stakeholder Survey 2010
An Industry Still in Need of Insight" Piers Lee

May/June

July/August

October/November

MRSS Education Seminars

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May/June 2010

Asian Research Conference

September 2010

Look out for details on www.mrssingapore.org.sg

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

ESOMAR

ASIA PACIFIC CONFERENCE

EYES ON ASIA

BANGKOK / 25 - 27 APRIL

There is a widespread sense that we have talked for 20 years about Asia as representing the future. Now the global economy has positioned Asia as a driving force of the world economic recovery. Asia is no longer the next thing but *the* thing.

In this context, business must find the way to invest in innovation and capabilities. How can market research help business exploit the opportunities that the economic situation is bringing to the region? How can local Asian market research companies leverage global opportunities to expand and grow their business? And what are clients looking for? How can local and international companies best utilise existing skills and maximize resources?

The answers to these critical questions will be the engine that drives the Asian research industry to react and adapt quickly to the new context.

As members of MRSS, we have been offered an exciting opportunity to attend the Asian Pacific conference that will be held in Bangkok in April.

ESOMAR, an international organization dedicated to promoting and enabling research across the globe, has offered members of our organization **a 15% discount** to attend this year's ESOMAR Asian Pacific Conference at the InterContinental, 973 Ploenchit Road, Patumwan, Bangkok, from the 25-27 April.

This discounted offer for discounted registration ***expires April 20th***, so to maximize your savings, make sure you register before then.

To learn more about what kind of topics and which speakers will be at the conference, please visit HERE http://esomarasiapacific2010.crowdvine.com/calendar

To register and learn more about the conference, please CLICK HERE IMPORTANT: When you register, please add the code: http://esomarasiapacific2010.crowdvine.com/pages/33889
MSS_2010
Please note that this code is only for MRSS members and is available for online registrations only.

Newsletter Highlights

PS (PROFFESSIONAL STANDARDS)

Telemarketing dials it up a notch.

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PS is a column from our Professional Standards Committee

Please let us know what you feel should be discussed. Your input/ views are most welcome

At the risk of stating the obvious, the main role of MRSS is one of industry watchdog. Of course we have training, education, lobbying and networking roles but our core job is getting adherence to high research standards in particular our Code of Conduct (ICC/ESOMAR International Code on Market and Social Research) and PSC Best Practice Guidelines.

As members, you are obliged to know these codes and make sure everyone in your organisation adheres to them. Over the coming issues, we're going to discuss key aspects of these codes and open a dialogue with MRSS members on ways we can:

- **update & strengthen these codes**
- **encourage their adoption by researchers and clients**
- **distance ourselves from organisations who claim to do research but who do not observe these codes.**

One initiative that we have discussed is a register of **suggers** or "people who sell under the guise of research[1]". I'm sure you have been phoned and asked to take part in a survey only to find that it is a cover story for a telemarketer. The practice is widespread and will undoubtedly harm the increasingly tenuous relationship with potential respondents (evident from declining survey participation rates) or possibly result in government restrictions that we have seen in the form of No Call Registers and other measures in some countries. Both outcomes need to be avoided for the sake of our industry and responsible practitioners.

Some of these suggers are clearly calling from outside Singapore which complicates matters but others are homegrown and repeat offenders. They just change their company name and keep calling.

Some suggestions are to:

1... Provide details on the MRSS website so MRSS members and members of the public can report suspected sugging instances.

2... Consider publishing a "black list" of repeat offenders (with legal advice of course) on our website.

3... Publicise the initiative to the public so they feel there is someone interested and that something might be done.

What do you think? Feel free to drop me a line at greg.coops@asianstrategies.com

Greg Coops is Chairman of your Professional Standards Committee.

[1] Sugging (selling under the guise of market research) and frugging (fund-raising under the guise of market research) occur when organisations building databases, or generating sales leads, claim to be conducting market research.
In genuine market research, individual respondents are guaranteed anonymity and no direct contact for sales or other purposes is possible between client and respondents. Source AQR, Glossary of Terms

People and Company News

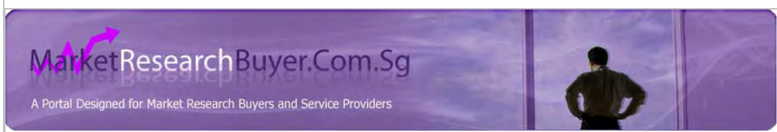
GMI strengthens team in Asia Pacific by opening Singapore office

GMI (Global Market Insite, Inc.), a market leader for online market research solutions today announced the opening of a regional office in Singapore. GMI has been servicing South East Asia for 5 years, developing into a market leader thanks to premium customer service and the development of localized, robust proprietary online consumer panels.

The new office will be led by **Christine Tan**, Business Development Manager for the South East Asian region. Christine joins GMI from Singaporean boutique custom research agency Consumer Probe. Our new localized team will offer full service fieldwork solutions from Singapore, adding depth in our market research expertise, and proximity to our clients.

"We are very excited about establishing the Singapore office and welcome Christine in our team, convinced she will bring valued advice and guidance to our clients, with her extensive business experience in both custom research and fieldwork services" stated Ludo Milet, Managing Director for GMI Asia Pacific. "Her experience and connections to the local and regional markets will truly benefit our clients, and confirm GMI's leading position within the online market research space in the region".
Should you need more information, please contact Christine Tan at ctan@gmi-mr.com.

About GMI
GMI (Global Market Insite, Inc.) provides the right information from the right people at the right time, empowering researchers and marketers worldwide to generate the most authentic insights possible for enhanced decision-making. Founded in 1999 with global headquarters in Bellevue, Wash., GMI has operations on four continents. For more information, please visit us online at www.gmi-mr.com or email us.



"I am pleased to inform MRSS members that www.marketresearchbuyer.net was launched on December 1, 2009.
This is a portal that allows market research buyers to post their briefs and receive free quotations from market research service providers. All visitors to the portal can freely access our price normative database. Buyers can commission a project to their selected service provider on the portal. At the end of each project, buyers are invited to provide an evaluation on the service provider. The evaluation provides future references to other buyers." Ching Chiew Lian, Founder & Consultant, 5Q Marketing Information. Market Research Buyer is owned by 5Q Marketing Information.

CSD
Cegedim Strategic Data

Cegedim Strategic Data (CSD) continues to expand within the APAC region with 2010 seeing the opening of a new CSD office in **Thailand.** CSD now has offices providing our products and services in **Australia, China, India, Japan, Korea, Malaysia, Singapore, Taiwan and Thailand** in the APAC region. Our product coverage also continues to expand with both syndicated and ad hoc studies including :
Promotion:

- New audits in **Singapore (GPs)** and **Thailand (Psychiatrists)**
- New specialty panels added in **China (Psychiatrists), Thailand (Psychiatrists), Taiwan (Psychiatrists), Singapore (GPs), Malaysia (OB/GYs), India (Psychiatrists, Neurologists, Gastroenterologists)**

Patient Diary Study (PDS) and Longitudinal Patient Data (LPD): A range of Syndicated and ad hoc studies in any therapy area are available. Current syndicated studies include:

- **Diabetes :** China, Malaysia, Japan, Korea and Australia
- **ARBs :** China, Japan, Australia (LPD) and Korea (LPD)
- **Antidepressants** : China, Japan, Australia (LPD) and Korea (LPD)
- **Asthma/COPD**: Japan

CSD continues to offer Longitudinal Patient Data (LPD) in **Australia** and **Korea** for **any therapeutic area**. In countries where this is not feasible, a syndicated and / or ad hoc Patient Diary Study (PDS) is an alternative option.
Zoom: A syndicated qualitative product providing an in-depth look at recall and understanding of communication messages for a particular therapy area. CSD is currently conducting a syndicated **Zoom Antidepressants** study in 8 markets across the region including **Australia, China, Hong Kong, Indonesia, Korea, Malaysia, Singapore and Taiwan.**
The CSD team also continues to grow with the following new staff and appointments : **Ae-Rang Kim** (PMR & LPD Analyst, Korea), **Sirius Gong** (Data Analyst, China), **Rena Zhao** (Data Analyst, China), Tricia Hsu (PMR Research Director, China), **Elisabeth Lazareff** (Country Director, Thailand & Vietnam)
A number of new Senior appointments and promotions have been made and these include : **Delphine Perridy, Executive Director CSD China** :
Delphine moved to China at the beginning of 2010 having been based at CSD HQ in France. Delphine has more than 10 years experience in the healthcare industry in Europe and the US, **Steve Jones, Regional Director, South-East Asia :** Steve is based in the Singapore office and will now directly oversee CSD operations in Australia, India, Malaysia, Singapore, Taiwan, Thailand and Vietnam., **Hema Patel, Research & Business Development Manager, APAC :** Hema is also based in Singapore and now takes on an expanded role including business development.. **Two new senior appointments have been made for CSD Malaysia :** These very experienced staff will commence in April. Both staff form part of our Regional team and will work across Malaysian, Singaporean and regional projects: **Kamlesh Punjabi**, **Regional Production Manager, Asia Pacific :** Kamlesh adds this new role to his current General Manager role for CSD India., **Dr. Marty Roberts, Country Manager for CSD Japan :** Marty has worked for a number of years for CSD, originally in the USA and more recently in Japan. **CSD Malaysia and CSD Singapore** will now operate as a combined entity with most staff in each office working across the two local markets as well as on all regional projects

MAJORITY OF SINGAPOREANS GENERALLY UNDAUNTED BY RISKS ASSOCIATED WITH SOCIAL NETWORKING SITES

LOSS OF PRIVACY THE KEY CONCERN CITED BY CLOSE TO A QUARTER OF USERS

It's been widely publicized at times – the security risks associated with social networking sites - yet despite this, many users in Singapore appear to be unperturbed with over half of the population online using social networking sites. Less than two-fifths of people show apprehension towards the media tool according to The Nielsen company's recent study among 1,000 Singaporeans aged 15 and above end of last year month .

Over half (52%) of the Singapore population are reportedly participating in at least one social networking website, with the most popular being Facebook—as indicated by over two-fifths (42%) of the population. Trailing behind as the second-most accessed community/social networking website is YouTube at 35 percent, while Friendster takes a distant third spot with one in 10 locals using it.

"Social media has become a big part of our life in today's society, especially so in a country as wired as Singapore—and this is particularly true among the younger generations. Nielsen's findings reveal that almost the entire (95%) 15-19 year old age group are using some form of social networking media, while nine in 10 (89%) of those in their 20s form the next biggest users," observed Ms Joan Koh, Executive Director for The Nielsen Company Singapore. "Expectedly, the proportion of users decreases with increasing age, with less than one in 10 (9%) of the above 60 age group use any form of social networking media."

When asked if they had any concerns pertaining to using social networking sites, close to three-fifths (58%) of users did not identify any issues. Among those who did express some form of anxiety, *loss of privacy from sharing personal information* emerged as a top concern—as indicated by nearly a quarter (24%) of existing users. Two other concerns raised by respondents were the *risk of accounts being hacked into* (8%), and *getting messages or requests from strangers* (5%).

"Singaporeans are generally well-aware of the local government's efforts to impose a certain level of control and regulate the Internet. Despite the high rate of Internet penetration in the country, incidences of online crimes and abuse are low compared to other countries, and this provides some degree of assurance among the population, who are hence less concerned about the risks associated with the Internet," commented Ms Koh.

According to Nielsen's survey, the main factor that motivates Singaporeans to get onto social networking sites is to keep their friends updated on happenings in their life, which is the reason cited by close to two in five respondents (39%). One in three (33%) is interested to be updated on happenings in their friends' lives, while more than one in five (22%) uses social networking sites to make new friends/network. Other reasons include sharing photos (16%), playing games (8%) and watching videos, etc.

"Social networking sites such as the widely-popular Facebook have enabled many people to connect and re-establish contact with friends and acquaintances from present to past, which would probably not have been made possible without putting in a lot of effort," observed Ms Koh."

Among those who do not currently use social networking sites, over two-fifth (43%) attributed computer-illiteracy as the main reason for non usage, followed by lack of interest (25%) and lack of time (22%).

Over the last 18 months IT budgets, investments and priorities have undergone a sea of change globally. To understand the changes in IT strategy among organizations, TNS's Technology research team launched a series of discussions with IT decision makers across six markets in Asia Pacific. Following are some key insights from the discussions:

Key Insights

- IT investments in India and China continued though at a slightly slower pace in the past 18 months. Infrastructure expansion especially in the second and third tier cities continued to drive growth.
- Mature economies in Asia (Australia, Hong Kong, Singapore) saw big ticket projects put on the back burner. Hardware replacement and application upgrades have definitely slowed down.
- Cloud computing is making clear inroads but internet infrastructure will be the key bottleneck in most developing countries (especially beyond top cities).
- Spending is hot in areas where BI applications overlap CRM solutions and Knowledge Management solutions including churn management, up-selling, cross-selling and customer share-of-wallet type applications.
- Productivity solutions such as (but not limited to) unified communications, workgroups and remote access management have taken off driven by cost considerations rather than pro-active technology deployment. Justifying long term ROI in these solutions as well as tackling cultural and privacy bottlenecks will be key.
- Developing infrastructure to manage the sheer volume of interaction (among millions of individuals) through e-Government projects continues to drive government and public sector growth in China and India.

Some of the insights were published in the recent Enterprise Innovation (December/January issue), a magazine focused on Technology issues.

Methodology

The research included over 65 IT decision makers from 6 countries in Asia Pacific namely India, China, Australia, Hong Kong, Singapore, Malaysia and Indonesia. The first interaction took place in Jan-Feb 09 and was followed by another round of discussion in Sep-Oct 09. The discussions addressed overall IT investment strategy across the organizations as well as explored the changes in the past 18 months and future outlook in the next 18 months. The research covered four broad buckets of business verticals: Manufacturing/ Logistics/Supply Chain; Banking/Finance/Insurance and allied; IT/Telecom/Communications and allied; and Public sector/Government.

Besides engaging in in-depth interaction with IT decision makers, TNS also leveraged its IT Decision Maker panel 'MybizInsights' for extended discussions with IT decision makers over a period of one week. Since the insights are based on the qualitative discussions therefore the findings are directional indicators rather than quantifiable statistics.

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Global survey reveals music trends rocking fans across the world

Almost one in five music fans 'will do anything' to meet their idols, and many are happy to view ads and even share their personal information for access to free music, according to a new study from global market research firm Synovate.

Steve Garton, global head of media research for Synovate, said: "Since the beginning of humankind, there has been a passion for music. From the primitive beating of drums, to even before we are born when we're already used to the steady beat of our mother's heart, we are programmed to have a passion for music."

Synovate surveyed 8,000 adults ages 18+ across 13 countries - Australia, Brazil, Canada, China, France, Hong Kong, Hungary, India, Korea, Philippines, Spain, UK and US - to understand the buying habits and preferences of music consumers.

Music makes the world go round

It's probably no surprise that music is the world's favourite pastime. Respondents were asked to rank their passion for music on a ten point scale, ranging from 'I couldn't care less' (1) to 'I'd listen every minute of the day if I could' (10). Across all the markets surveyed, the majority of people (63%) consider themselves passionate about music, ranking their passion at level 6 or above. This was highest in Brazil (80%), Spain and the UK (79% each), while Australia ranked lowest on the music passion scale at 27%.

Celebrity access

Celebrity culture is alive and well. Nineteen percent of people say that they would 'give anything' to meet their favourite music artists, though exactly what that might be is anyone's guess! Fans in the US (33%), UK (32%) and Spain (30%) are the most obsessed with this idea, while consumers in China, Hong Kong, and Hungary aren't ready to do anything special to meet their favourite music stars. Only 7% each would, the lowest among all markets surveyed.

Mobile music rising?

The advent of MTV in 1981 ushered in a whole new way for musical artists to connect with their fan base, and TV still remains a key medium for consumers to watch music videos. But the computer and mobile phone are becoming strong contenders. When asked how they watched music videos over the past month, more than half of those surveyed (57%) say they watched them on TV while 46% watched them on the computer. Another 16% used their mobile phones, which was highest in India (38%), Philippines (23%) and China (20%).

The lowdown on downloading and streaming

Despite what some may think, the record store is not dead. Even with the rise in digital music, many still want to own music in its physical form. In the past month, almost one-third of people bought a music CD at a store while 11% purchased one online. While this is good news for music retailers, there is still an underbelly of counterfeit CDs and illegal downloading that physical and online retailers are competing with. The music industry has spent considerable effort to attach stigmas to illegal music downloading, which may be working in some markets.

Musical merchandising

Leveraging an artist's current reputation and image, or developing a new one, through merchandising can mean big money for the artist and the companies working with them. An overall 16% of people bought a live music / concert DVD in the past 12 months, topped by the UK at 25%, while 16% bought ring tones / wallpaper via their mobile, topped by Koreans at 66%.

Ads are ok

So what about all the advertisements shown on music downloading and streaming websites? They're no problem at all for most consumers, especially if they offer something in return. Forty-four percent of people globally are happy to view or listen to ads if it lets them download free music while 41% are ok with viewing ads if they can get access to free music streaming.

Brands, bands and fans

Product endorsements and promotions / competitions that feature musical artists are one of the quickest ways to establish an artist's brand, and the study indicates that consumers support this.

Almost one-third (30%) of people globally look out for competitions or promotions that feature their favourite artists and bands (topped by China at 49%) while 43% agree that 'If brand sponsorship is the only way an artist can make money, I think they should do it (even if they have to compromise)'.

About the study

This Synovate In:fact survey on music was conducted in December 2009 across 13 markets – Australia, Brazil, Canada, China, France, Hong Kong, Hungary, India, Korea, Philippines, Spain, UK and US. It covered over 8,000 respondents aged 18+ and was conducted using online, face to face and telephone research methodologies.

Home-use blood pressure monitors in South East Asia

Roughly 55 million people in South East Asia are potential customers for home-use blood pressure monitors. With relatively larger, older, and more urbanized populations, Indonesia and Philippines comprise the largest addressable populations for home-use blood pressure monitors. The largest addressable market in the region is Malaysia, where a larger proportion of the population enjoys middle-class or higher income levels.

Addressable population is defined as the maximum number of potential customers in a country. The estimate has been calculated using a bottom-up approach, assuming purchase by hypertensive patients who typically live in urban areas. An additional filter of middle-class or higher income level has been applied to estimate addressable market value. Population surveys commissioned by health ministries and international research initiatives indicate that hypertension, diabetes, heart disease and stroke have become widely prevalent in South East Asia. Especially among urban populations, incidence of these conditions is expected to rise further along with changes in affluence, diet, activity and environment. There is also a marked growth in awareness of such 'lifestyle' diseases, and interest in monitoring and treating them.

In a recently concluded Clearstate study, the South East Asia market for home-use blood pressure monitors was estimated at roughly USD 13 million in 2008, from approximately 570,000 units sold. Though sales slowed in the aftermath of the global financial crisis, they are expected to pick up again. Double-digit growth—on average, at a compound annual growth rate of 15%—is expected across South East Asian countries until 2010, when the market is projected to reach roughly USD 30 million from 1.4 million units sold.

Digital blood pressure monitors—both wrist and upper arm—are preferred for home use in almost all countries in the region, surprisingly even in emerging economies like Vietnam. The exception is the Philippines, where both aneroid and digital blood pressure monitors continue to be sold for home use. Some outpatient clinics and hospitals still buy aneroid blood pressure monitors, which are perceived to be more accurate and cost-effective. However overall there is a clear trend towards digitalisation.

About Clearstate : Clearstate offers strategic advisory and intelligence services to help medical devices, health care services, and pharmaceutical and biotechnology firms understand their current and potential markets, implement pragmatic and innovative strategies to ultimately tap into new growth opportunities with the Asia Pacific region. Clearstate also provide accurate, reliable and comprehensive intelligence on medical device usage and demand across Asia Pacific. Our Gateway series of market trackers are an in-depth analysis of historical, current, and future demand behaviors and preference trends amongst health care and commercial settings. The real benefit of our data extends beyond just providing market visibility; our comprehensive understanding of the medical device market in Asia from years of actual industry experience enables us to provide intelligence and advisory services that addresses the specific sales and marketing objectives of Life Sciences companies. For more information about Clearstate, visit its website at www.clearstate.com.

This February – March 2010 edition of the MRSS Newsletter was compiled and edited by

CLS Research Solutions