



# MRSS Newsletter

Dec '08 - Jan '09

## Calculated Risks ... at the Races

MRSS members take on the Turf Club for a night of racing revelry

Members of the MRSS came out in festive force for the second annual Night at the Races on Friday, December 5th. More first-time betterers than seasoned bookies, the group was timid in the first few races, but soon most were quickly flipping through betting guides and glued to the glass for each race to see just how much their modest bets could win.

Far from the madding crowd, the researchers had a high-flying view from the Singapore Turf Club's Orchid Room where food and drink flowed aplenty. However a number of attendees made their way to the paddock's mezzanine to grab a closer

look at just which horses they would wager on.

The strongest and most spirited showing from Millward Brown Firefly arrived with 10 members of their team. Other organizations represented included: Market Probe, Joshua Research Consultants, Kadence Research, Cataliz Research, Asian Strategies, CLS Research Solutions, The Nielsen Company, The Research Partnership and Sentosa Leisure Group.

Many went home winners if not from calculated betting than at least from lucky draw cash and shopping vouchers provided by the event's

sponsors. Prizes in 100-dollar denominations were sponsored by society member companies: Proba, Market Probe, CLS Research Solutions, and Joshua Research Consultants.

Thanks go all to all sponsors, congratulations to all winners, and we look forward to seeing you all at next year's end-of-year event.

### Newsletter Highlights

MRSS News	1
Company News	3
Contributed Articles	5

## Call for Papers

**Call for papers**

# NEW FRAMES OF REFERENCE

## REDEFINING RESEARCH IN CHANGING TIMES

Market Research Society of Singapore  
Asian Research Conference 2009  
June 18 - 19, 2009

Changing times call for changing measures. Among economic uncertainties, diverse client needs and ever-updating technological developments, research must lead the way. The research community will need to work together to create new ways of gathering and delivering insights to stay both relevant and competitive.

- New methodologies
- Case studies in change
- Demographic and social trends effecting change
- Recession coping strategies
- Presentation developments
- New advice for advertisers
- Training and in-house development
- Effective & profitable client partnerships

The best outlines submitted will be chosen for presentation during the conference and will be in the running for the Best Paper Award, voted by conference attendees and awarded a \$1,500 SGD cash prize.

Submit a presentation outline by March 15 to be a part of this exciting event.  
Email to: [theresa\\_wong@mrssingapore.org.sg](mailto:theresa_wong@mrssingapore.org.sg)

## MRSS Announcements

### MRSS Marketing Research Education Seminars 2009

*At the beginning of each year, MRSS provides its members and associates a series of professional development courses. This year, the training seminars will be conducted at the YMCA Orchard from 6th to 9th April 2009.*

*Take a look at our programme and see where MRSS Training can take you!*

The MRSS recognizes the critical role trainers play in maintaining the quality and integrity of our training program. We thank our past trainers for their ongoing commitment and for their significant contribution of time, effort, and expertise.

Our trainers are highly-qualified and experienced practitioners in the market research industry. They have been carefully selected based on their expertise in their respective fields and bring to MRSS a rich pool of technical knowledge and practical experience.

<b>6-Apr-09</b>	<b>Quantitative Research: From Design to Execution</b>	
9 am-1 pm	Methodology and Research Design	Samir Mardolker (Research International)
2 pm-6 pm	Questionnaire Design and Execution	Guy Hearn (Omnicom Media)
<b>8-Apr-09</b>	<b>Qualitative Research: From Design to Delivery</b>	
9 am-1 pm	Methodology and Research Design	Peggy Tan (Consumer Probe)
2 pm-6 pm	Delivering Insightful Reports	
<b>9-Apr-09</b>	<b>Quantitative Research: From Data to Insights</b>	
9 am-1 pm	Providing Insights in Quantitative and Multivariate Analysis	S. Swaminathan (Market Probe)
2 pm-6 pm	Delivering Insightful Reports	

These courses are provided at a very affordable rate, with discounts offer for registration to all 4 days of training\*. The course fee structure is as follows:

Per day at S\$250 for MRSS members/S\$300 for non-members;

All 4 days (same participant) at \$800 for MRSS members/\$1,000 for non-members.

Course fees above include workshop materials and refreshments and lunch. There is no GST charge on course fees.

\*Please refer to pre-requisites to each course in the program outline

For more details on registration, please visit the MRSS website [www.mrssingapore.org.sg](http://www.mrssingapore.org.sg) or contact Theresa Wong at [theresa\\_wong@mrssingapore.org.sg](mailto:theresa_wong@mrssingapore.org.sg) for enquiries.

## ESOMAR Asia Pacific 2009 Conference

### COMPETING ON A WORLD STAGE

Asia is a mosaic of old and new, rich and poor, simple and complicated, artificial and natural, east and west and so much more. It has a young spirit with enough energy to produce innovative new approaches, ambitious thoughts, novel methods and innovative technologies within marketing and market research.

What are these Asian approaches? What are Asian insights? What are Asian secrets to sustainable growth? Can Asian methodologies be applied on a world stage?

Answering these exciting questions will be the engine which drives Asian economies and our research industry in the years to come. Those who understand their markets and can react quickly to change will be the big success stories of the future.

This conference explores what we can expect from Asia in the fields of marketing and marketing research from three perspectives:

Market Research 'Made In Asia'  
The Business of Market Research  
Competing at Home and Abroad

Date: 5-7 April, 2009

Venue: China World Hotel, Beijing

Website: [www.esomar.org](http://www.esomar.org)

## Nielsen announces senior retail & consumer research appointments in Singapore



January 14, 2009

**Miklos Viragh**, previously Director, Client Solutions, has been promoted to the position of Executive Director, Retail Measurement Services Product Leadership, Nielsen Singapore.

Miklos is a veteran in market research with over 13 years of experience in FMCG retailing. He first joined Nielsen in Hungary in 1995, and transferred to Nielsen Singapore in 1997.

In his new role, Miklos will continue to be a member of Nielsen's Singapore Management Committee as well as manage Nielsen's Singapore Retail Measurement business.

**Joan Koh**, previously Director, Client Solutions has been promoted to the position of Executive Director, Consumer Research, Nielsen Singapore.

Joan joined Nielsen in 1999 in the Consumer Research team. Her decade-long market research experience spans a broad spectrum of industries, ranging from fast-moving consumer goods, durables, finance, IT and telecommunications sectors. In her new role, Joan will assume leadership of Nielsen Singapore's Consumer Research function and becomes a member of Nielsen's Singapore Management Committee.



**Miklos Viragh**  
Executive Director  
Retail Measurement  
Services Product  
Leadership  
Nielsen Singapore



**Joan Koh**  
Executive Director  
Consumer Research  
Nielsen Singapore

## Kadence acquires new Associate Director



**Ana Bautista** has joined Kadence Asia Pacific as an Associate Director. Ana has 11 years market research experience including client-side positions in healthcare, media, and FMCG categories. Ana was the Market Research Manager at Glaxo SmithKline, Consumer Insights Manager at Unilever, and Research Manager at GMA Networks. She has also worked agency-side with Research International where she worked in financial services research among others.

Ana joins Kadence's full service research team in Singapore heading a team of four where she will work on both qualitative and quantitative projects with a focus on concept testing, product development, and usage and attitude studies.



**Ana Bautista**  
Associate Director  
Kadence Asia Pac.

## Quantum Market Research Asia Pacific Pte. Ltd. Appointments

### Ms. Sharanya Sitaraman

She moves in as Vice President, APAC to head operations for Quantum Singapore

She has over 11 years qualitative research experience. Her experience and understanding of Asian consumers is immense and she has led large multi country projects for regional and global clients.

A Post Graduate in Marketing Communications from the MICA, she has been a frequent paper presenter some key fora such as ESOMAR, MRSI etc.

### Mr. Khandker Swanan Shahriar - Senior Manager, APAC

Shahriar has over 6.5 years experience in research and was previously the head of Quantum’s operations in Bangladesh.

His past experience includes 2 years of economics research with the World Bank as well as North South University, Dhaka.

He is a post graduate in Economics and has authored articles on Market Research for publications and newspapers.

## Market Probe Snr. Vice President Heads pre-conference workshop



### Dr Kurt Pflughoeft, Senior Vice President and Head of Research & Development at Market Probe, led the pre-conference workshop on Customer Attrition, at the 3rd International Consumer Insights Forum, held in Amsterdam, in October 2008.

More than 120 market research and consumer insight professionals from around the world, convened for this forum.

Dr Pflughoeft’s workshop was designed to (1) Examine strategies to identify important / key predictors of customer attrition, (2) Identify customers who are most at

risk even when their satisfaction scores are high, and formulate intervention strategies, (3) Leverage techniques such as survival analysis and data mining to uncover hidden relationships and (4) Learn from corporate best practices on how to instill loyalty

The workshop was entitled, “UNDERSTANDING CUSTOMER ATTRITION AND DEVELOPING INTERVENTION STRATEGIES.” Everyone wants to mitigate the attrition of profitable customers but many challenges exist, from the identification of these customers to the development of successful intervention strategies.

“Theoretical advances in customer attrition research have been slow to develop but fortunately many parallels can be drawn from college student attrition studies,” said Dr

Pflughoeft. “Furthermore, advances in statistical techniques to handle the time-varying aspect of attrition have been developed including Survival Tree Ensembles.”

Dr Pflughoeft discussed some of the challenges companies face when putting together a customer data mart suitable for analysis. It is not necessary to have a complete data warehouse or CRM system, but rather some information regarding the customer account, demographics and attitudes can be useful for analysis.

To request a copy of Dr Pflughoeft’s presentation, please contact: info@marketprobe.com

## SINGAPORE RANKS SECOND IN THE WORLD AS THE COUNTRY WITH THE HIGHEST OWNERSHIP AND USAGE OF MEDIA TECHNOLOGY

### NIELSEN SURVEY FINDS EAST WEST DIVIDE IN MEDIA HABITS



SINGAPORE, 7 January, 2009: Proving its position as one of the most 'wired' societies in the world, Singapore emerged second in The Nielsen Company's latest survey of 52 countries to shed light on global citizens' entertainment technology ownership and consumption habits.

Singapore ranked second as the country with the highest entertainment technology ownership, and eleventh, for highest media consumption - taking the country to an overall second position as one of the most avid owners and consumers globally of entertainment technology.

Of the 52 countries surveyed, five from Asia-Pacific occupied spots in the top 10 list with the highest levels of ownership and usage across a range of media devices, including home entertainment, music, videogames and digital media (any type of information stored in the computer, including data, voice and video). The Philippines took pole position, while Australia, Hong Kong, and New Zealand came in at fourth, eighth and tenth positions respectively.

"Technology access is not an elite domain in Singapore. A large proportion of the population is connected and computer-savvy, thanks to the government's relentless drive to harness the power of ICT to transform this city-state into one of the most developed economies in the region," said Ms Rebecca Tan, Executive Director, Media, The Nielsen Company.

The findings emerged from the entertainment portion of the biannual Nielsen Global Online Consumer Survey, which reached 26,000 online users, including 500 in Singapore in September 2008. Rankings were computed by measuring a range of scores in response to thematically similar survey questions.

Interestingly, the so-called digital divide between emerging and developed economies worldwide may not be that wide after all. While Western countries tend to be heavy users of media hardware like DVD players and gaming consoles, next-generation devices like video-enabled handsets are more popular in the up-and-coming markets, particularly in Asia.

Through the survey, it has been noted that many Asian consumers largely skipped landlines in favor of wireless technology.

"In Singapore, for instance, many own one or more mobile phones. Mobile line subscription has been on a consistent

upward trend for the last ten years, with the latest statistics reaching 129.7 percent penetration level - which explains how Singapore emerged in our survey as the country with the highest rate of mobile phone ownership in the world!"

"The same leapfrogging is taking place with entertainment," Ms Tan said. "For example, consumers are circumventing the need for a relatively expensive gaming console to play subscription-based videogames online."

Ms Tan also identified other factors responsible for media usage in many Asian countries such as the broad uptake of mobile due to widespread use of public transportation and government policies maximizing broadband access in China and Singapore.

"Total household broadband penetration rate in Singapore now stands at 94.3 percent. With the widening coverage of Wireless@SG in Singapore, on-the-move web-surfing has become a very affordable, accessible, and convenient option. With the government's continual effort to extend broadband access to more public places, we can expect to see further growth in mobile broadband users in the country," said Ms Tan.

In contrast, Western countries tended to score better on less mobile offerings like console video games and DVD players. But when it came to streaming and downloading content, Eastern nations like China proved no match.

In Singapore, music or other audio tracks/files are most commonly streamed and downloaded. Nielsen findings reported that in the past month, close to three-fifths (59%) of Singapore online respondents streamed an average of four music/audio files, while over a third (35%) downloaded more than two music/audio items. (Charts 1 & 2)

"Piracy has kept the cost of acquiring music down both on CDs and downloads," Ms Tan said.

The Nielsen study also yielded a sense of which media devices are used most across the world.

The desktop or laptop computer managed to edge out the television set, with 77 percent of respondents indicating they had used a PC during the past month, just ahead of 75 percent for TV. The CD player finished with 50 percent, followed by DVD (48%). The emergence of wireless devices also registered, but ones that have media capabilities were behind those that did not. Mobile phones without video or Web capabilities were used by 40 percent, while video-enabled phones finished with 30 percent.

## Singapore ranks... (Continued)



In Singapore, slightly more people own a television set (98%) compared to a PC (97%), although the equal number of people—over nine in ten (92%), claimed to have used their personal computer in the past month. The DVD as well as CD players are also commonly owned electronic gadgets—with over eight in ten respondents claiming to own one. In terms of actual usage, they are significantly less used compared to the TV and PC. (Chart 3)

Another likely factor skewing media usage in favor of emerging countries is the average age of their online population is more than 10 years younger than in the West.

Furthermore, countries plagued by content piracy problems are also likely to perform strongly on results for the survey, which does not make a distinction between users engaging in legal or illegally obtained media.

How many times have you downloaded the following media items from the internet in the past month?

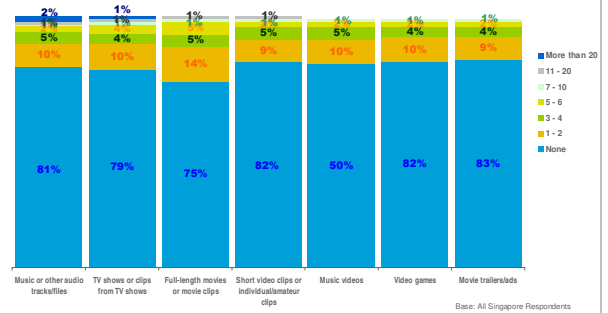


Chart 2

Which of the following do you have in your household, in working condition / have used in the past month? - Singapore

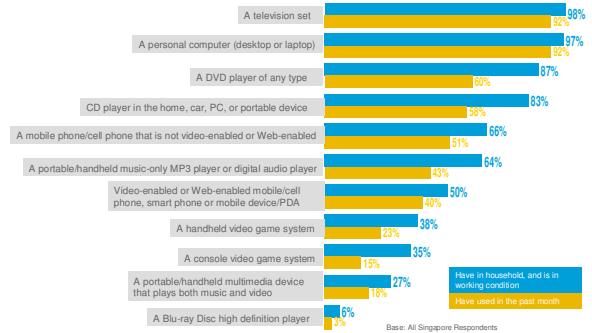


Chart 3

How many times have you streamed the following media items from the Internet in the past month?

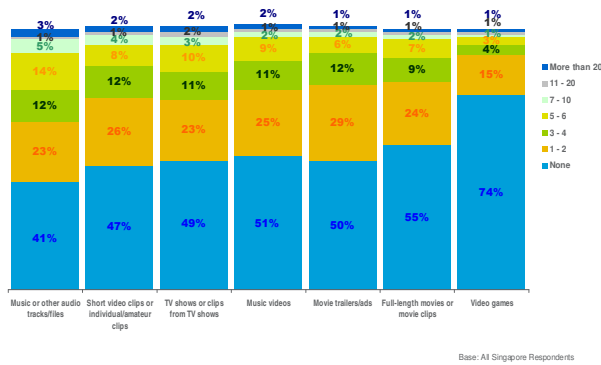
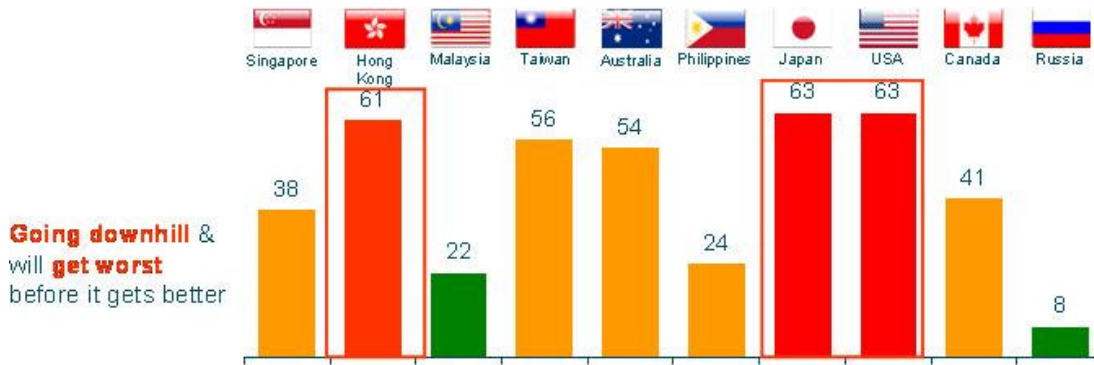


Chart 1

## THE STATE OF THE ECONOMY

Consumers attitudes towards the economy



- Synovate surveyed the consumer attitudes of 7,400 respondents in 10 countries between August and November 2008.
- 4 out of 10 Singaporeans listed "losing my job" as their greatest fear. Respondents in 6 out of 10 countries surveyed – including Hong Kong, Taiwan, Malaysia, Philippines and Russia also listed that as their biggest fear. Being unable to pay off mortgage or rent was Americans' top fear.
- When asked about the current state of economy, Hong Kong, Japan and USA were least positive, with 6 in 10 claiming that "it's going downhill and will get worst before it gets better".



- 56% of Singaporeans surveyed said they spent less on luxury goods in past 6 months. They also cut down on impulse buying.
- Nearly 3 out of 10 Singaporeans said holidays would be the first item they would give up, followed by branded items at 18% of respondents.
- The Americans took the lead among all countries surveyed, with 70% who would compare prices more. 1 in 2 Singaporeans will do so.

## SINGAPOREANS EXPECT TO SEE UNEMPLOYMENT RISE IN 2009



### Despite unemployment forecast, job security prevails

**SINGAPORE, 13 January 2009** – According to the findings from a survey conducted recently by TNS and Gallup International, whilst three quarter (78%) Singaporeans expect the number of unemployed to rise this year, only 30% of those currently in employment think there is a chance that they may be the one to lose their job.

The Voice of the People™ End of the Year Survey was conducted between October and December 2008, and asked people in 46 countries around the world about their employment prospects in 2009.

#### Expected unemployment rise

The sentiment of Singaporeans has been dented by the global financial crisis that erupted during mid-2008. More than three quarter (78%) say that unemployment will rise and at the same time, 77% feel Singapore's economic prosperity will decline in 2009. Almost two-third (63%) of Singaporeans expect the coming year will be worse for them than last year, compared with an average of 35% globally. Just one in five (20%) Singaporeans think that it will be better, while 17% believe it will remain the same, against global averages of 27% and 31%, respectively.

#### Job Security

Despite the gloomy unemployment forecast, more than three quarters (70%) of either full or part time working Singaporeans feel confident that their present job is secure. Just 30% think there is a chance they might join the ranks of the unemployed this year. In view of the 78% of the Singaporean citizens that expect unemployment to increase in their country during 2009, these results are especially interesting as clearly most of the interviewees do not consider they will be the ones affected. This reflects a global trend to some degree: 66% of working respondents worldwide think unemployment is set to rise, yet only 27% are concerned they will lose their own jobs.

#### Confidence in finding a new job

Assessing the difficulty they would have in finding a new job if they lost their current one, 79% fear it would take long. Only 17% of Singaporeans believe they would be able to find a new job fairly quickly. In this respect Singaporeans are more pessimistic compared to the worldwide figures of 54% and 31%, respectively.

TNS, GIA End of Year ASIA PACIFIC	AUSTRALIA	HONG KONG	INDIA	INDONESIA	JAPAN	KOREA	NEW ZEALAND	PAKISTAN	PHILIPPINES	SINGAPORE	CHINA
<b>Unemployment?</b>											
Increase a lot	26	52	30	30	31	31	28	46	63	37	23
Increase slightly	44	32	27	38	35	42	46	11	14	41	55
Remain the same	8	3	24	20	11	18	10	13	13	4	8
Fall slightly	16	7	16	11	6	4	11	9	9	12	10
Fall a lot	4	6	1	0	3	1	4	5	2	6	3
Don't know	2	-	2	1	14	5	2	16	-	-	2
<b>4. Are you employed?</b>											
Full time	40	67	39	26	42	36	49	27	35	70	76
Part time	22	12	2	19	19	7	19	4	13	13	6
No	38	21	59	55	38	57	31	67	51	17	18
<b>5. Is your job safe? (Base: All employed)</b>											
Present job safe	81	65	62	71	30	53	79	62	55	70	68
Chance of unemployment	17	35	31	19	22	29	18	19	45	30	29
Don't know	2	-	6	9	48	19	3	19	1	-	3
<b>6. Ease of new job? (Base: All employed)</b>											
New job quickly	64	20	31	28	13	29	55	22	33	17	47
May take longer	33	72	56	52	51	49	39	45	56	79	38
Wouldn't look	2	8	8	6	10	8	3	12	10	4	6
Don't know	1	-	4	14	26	14	4	21	-	-	9



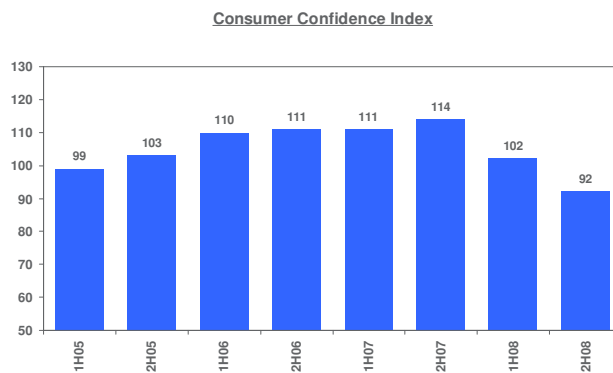
# CONSUMER CONFIDENCE IN SINGAPORE SLIDES TO AN ALL TIME LOW



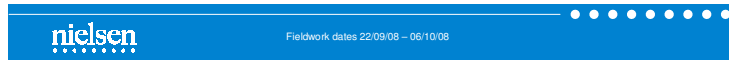
Singapore, 20 November 2008: One-third of Singaporeans (33%) have started feeling the onslaught of the economic downturn, even before the government’s announcement that the Lion City is mired in a technical recession. This was revealed in the latest Nielsen Global Consumer Confidence survey, conducted in the midst of the global financial crisis.

A twice-yearly study, the Nielsen Global Consumer Confidence polled 26,202 consumers in 52 countries from 23 Sept to 6 Oct 2008 about their confidence levels and economic outlook since the last survey in May 2008. The study includes 500 Internet users of all ages in Singapore.

Consumer Confidence Index trending for Singapore since 2005

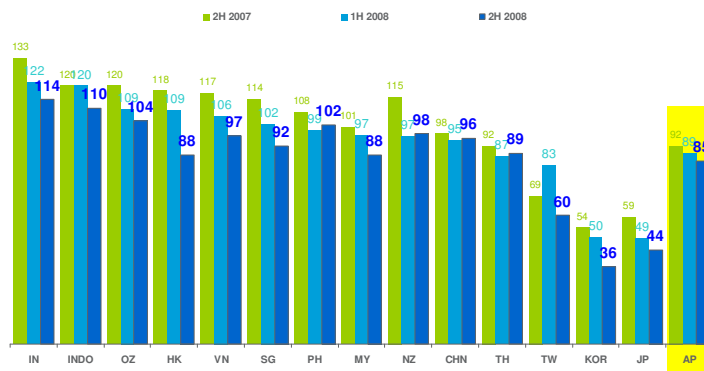


Source: Nielsen Global Online Omnibus

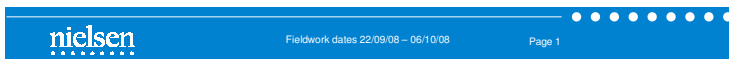


As the latest survey reveals, global consumer confidence took a further beating, dropping from 88 to 84. Singapore has not been spared, as its consumer confidence index fell a further 10 points to an all-time low of 92 (Chart 1). Exactly one year ago, consumer confidence in Singapore was at its peak of 114. Singapore now ranks 14<sup>th</sup> on the global list in terms of overall consumer sentiment and the 8<sup>th</sup> in Asia Pacific. (Chart 2)

Consumer Confidence Index



Base: All Respondents



## CONSUMER CONFIDENCE IN SINGAPORE SLIDES TO AN ALL TIME LOW... (Continued Part 2)

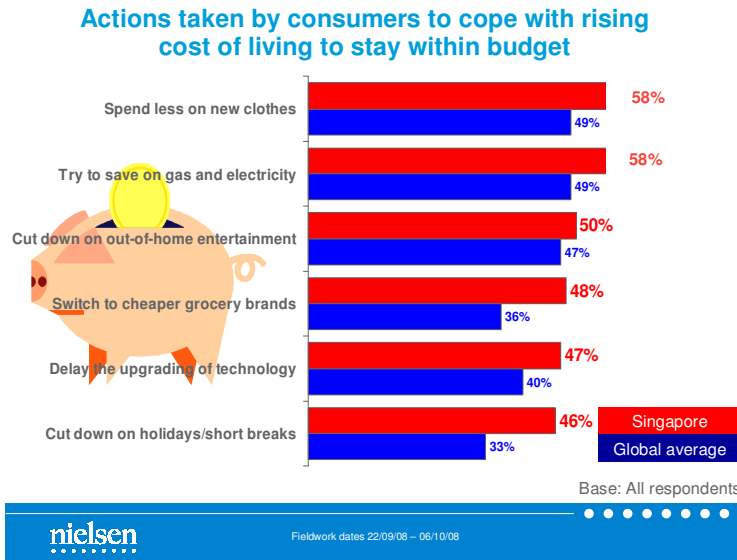


“For global consumers, the last 12 months have been challenging and turbulent – Singapore is no exception with an economy that is closely intertwined with the world’s demand,” said Ms Vicky Santos, Executive Director, The Nielsen Company Singapore.

On a more positive note, Singapore currently has one of the lowest proportions of consumers who think that the domestic economy is already in recession (33%). Among these consumers, however, only one-fifth (22%) expect the recession to end within the next 12 months. “With several growth catalysts such as the opening of the Integrated Resorts, the Youth Olympic Games, and the recently announced MotoGP in the pipeline, the situation is not currently deemed to be so grim in Singapore,” added Ms Santos.

Spending is likely to remain tight over the upcoming Christmas season for many, with close to half (48%) of consumers globally and nearly half Singaporeans (45%) describing the state of their personal finances as *not so good/bad* – a clear indication that extravagant spending sprees aren’t on the cards in the near future. Moreover, seven out of 10 Singaporeans (68%) are assuming a cautious stance towards spending at this time.

To stay within their budgets, Singaporeans are eyeing spending less on clothing (58%), saving on gas and electricity (58%), cutting down on out-of-home entertainment (50%), switching to cheaper grocery brands (48%), and delaying upgrade of tech gadgets (47%) as means to cope under the challenging economic climate. (Chart 3)



Compared to previous downturns, the turmoil this time round is likely to have a serious impact on lifestyle and cultural factors in many parts of the world. In fact, consumers have already started changing their daily spending patterns and lifestyle behavior a year ago. “At the end of 2007, the USA was already entrenched in the sub-prime crisis and consumers around the world were grappling with falling property prices in tandem with rising food and fuel prices and volatility in local stock markets. These events had already forced consumers to make changes to their lifestyle and right now they are simply intensifying these changes and cutbacks as they shift gear into serious credit crunch mode,” Ms Santos observed.

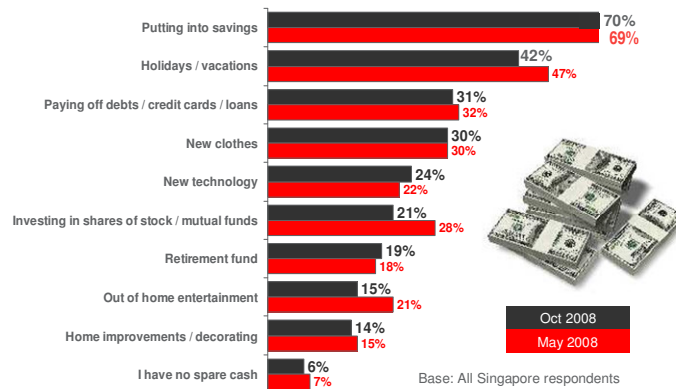
## CONSUMER CONFIDENCE IN SINGAPORE SLIDES TO AN ALL TIME LOW... (Continued Part 3)



"Staying In has become the new Going Out for a new breed of credit crunch consumers," said Ms Santos. "And while restaurants and bars may already be feeling the pinch, the "stay-in" trend is providing new marketing opportunities for innovative at-home entertainment options as well as at-home food and beverage products, along with premium and prepared food ranges specifically aimed at home entertaining."

When queried on how they will spend any spare cash after covering essential living expenses, a high majority (70%) said they will put it into their savings nest. However, most Singaporeans are avid travelers who enjoy their customary annual overseas trip. Even as they switch to their cost-saving mode, spending on holidays/vacation still ranked second on their list if they have extra cash to spend. In this time of economic volatility, cautious investors have also decided to put their investment plans on hold, as seen by the decline in intention (7 percentage points) by Singaporeans to put their money in stocks/mutual funds. (Chart 4)

**How Singaporeans intend to spend their spare cash**  
Oct 08 vs May 08



"However, even during economic slowdowns it's important to remember that there are opportunities for savvy marketers, and brand investment during a downturn has never been more important to drive and secure brand loyalty for better days ahead," said Ms Santos. "Companies that continue to invest in their brands and products and stay constantly engaged with their target market will come out of this downturn as winners. Consumers will remember the companies and products which best understood their changing needs and demands during a slowdown."

(Continued...)

## CONSUMER CONFIDENCE IN SINGAPORE SLIDES TO AN ALL TIME LOW... (Continued Part 4)



### THE NIELSEN GLOBAL CONSUMER CONFIDENCE SURVEY – OCTOBER 2008

Although consumer confidence declined across all global regions in the last five months, Latin America remained the most optimistic region, with a regional Consumer Confidence Index average of 96.8, followed by EMEA at 88.5 and Asia Pacific at 85.1. Consumer confidence in North America fell 2 points to 83 while Europe fell five Index points to 77. The global Nielsen Consumer Confidence average fell four Index points from 88 to 84 points.

Despite a drop of eight points in the past five months, India (114) and Denmark (112) came out on top of global Consumer Confidence rankings this month, while South Korea, which saw its stock market close at its lowest since October 2005 recently, languished at the bottom of Consumer Confidence rankings at 36 points, a loss of 14 points in the last five months.

Singapore, Chile, Ireland and Latvia recorded further double-digit declines in Consumer Confidence for the second time this year – a clear reflection of the global nature of this economic slowdown.

The only nations which recorded marginal increases in consumer confidence were Brazil (4 points), Philippines (3 points) and New Zealand, China, Venezuela, Thailand and South Africa gained one point compared to five months ago.

**This December - January edition of the MRSS Newsletter was compiled and edited by**



RESEARCH INTERNATIONAL