

Breakfast in Second Life



MRSS was lucky to have Ms Isis Shek, Senior Regional Account Director, Viacom Brand Solutions Asia Pacific, MTV Networks, as our speaker at our November Breakfast talk.

Isis gave an impromptu explanation of Second Life at this year's Research Day but she kindly agreed to come back armed with her laptop to take MRSS members through the virtual world that has now attracted 10 million avatar-wielding players.

Her presentation was entitled "*Beyond Real Life. The Virtual Immersion*" and Isis demonstrated that Second Life is deeply engaging – she freely admitted that a Friday evening there can be more compelling than one spent with real friends. This is not a game for socially awkward geeks but a highly social fantasy world that allows one to hook up with creative and uninhibited people from all over the world. It seems inevitable that it has now intersected with other social networking sites like Facebook and has spilled over into RL (SL-speak for real life) as the people behind the avatars can eventually meet up.

SL also takes a long time to master and Isis has invested up five hours a day learning the skills to build and dress her perfect avatar and negotiate her way around the islands, homes, cars, clubs and fashion mags in this land of the latest property boom (although for a fraction of what it costs in Singapore. No COE in Second Life – a new Mercedes can be driven away for the Linden Dollar equivalent of US\$2).

Of course research companies have quickly followed their clients on to SL as both attempt to reach a generation that has tuned out of traditional media. Some like Starwood Hotels have used SL to get design input for their new properties.

Not surprisingly panels have sprung up. French research company Repères has a panel of 7,000 avatars which it claims is representative of the profile of the SL population. An exploratory study it conducted with 137 residents led them to the following conclusions:

- SL is perceived by the residents to be the largest community ever created
- SL isn't about isolation it's a meeting place involving:
 - the discovery of other cultures – differences and commonalities;
 - helping other people navigate through SL;
 - building together;
 - making friends.
- SL is considered a humanitarian step, albeit with the raunchier sides of RL, but one with a mostly positive side characterised by:
 - authenticity and self-expression (no discrimination or normative repression)
 - the opportunity to develop new skills
 - infinite potential for discovery and creativity limited only by imagination
 - total freedom to live out one's fantasy, escape from the mundane and to have fun

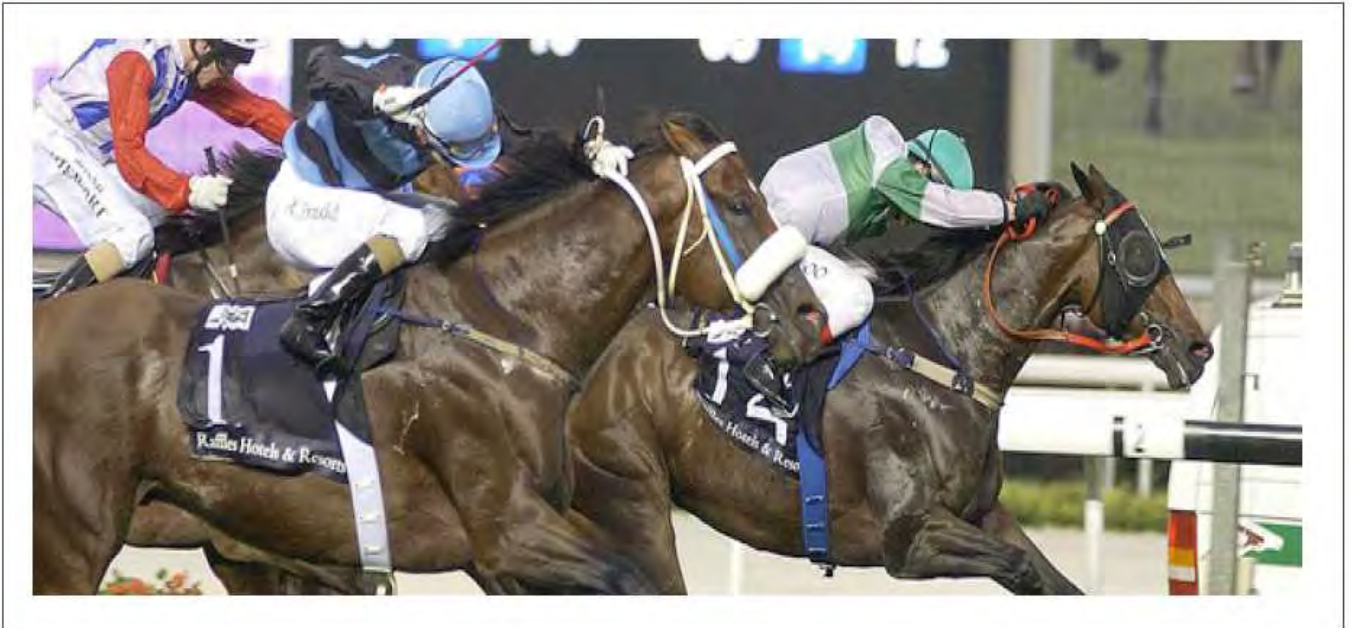
Finally, SL has an economic dimension which delights the entrepreneurs but some regret that the commercialism of RL is contaminating the utopian ideals of SL.

Sounds like the place to be. Many thanks to Isis for the guided tour. In the meantime we'll have to make do with Real Life breakfast talks so stay tuned for our next speaker in January.

And don't forget the Night at the Races planned for December. It's our last event of this year and promises to be even more fun than Second Life.

Contributed by Greg Coops, Asian Strategies

AN MRSS INVITATION



Join us for a night at the races!
Friday, 7 December 2007, from 7:00pm-10:00pm
at the Orchid Box, Singapore Turf Club
(snacks & refreshments are on us, just bring your
wallet!)

A private coach will leave from Newton Circus carpark
at 6:00pm & return after the races (ETA 10:30pm).

Admission badges will be provided by MRSS

Please RSVP to Theresa Wong
(theresa_wong@mrssingapore.org.sg) by 23 November
2007.

More details to follow

Headaches, Colds and Backaches—Most Common Health Complaints: Nielsen Global Survey

Singaporeans report the World’s Highest Sore Throat Incidence

Key findings from a global health survey conducted by The Nielsen Company has found that headaches, colds, sleeping problems, and backaches are the most common ailments of the world’s consumers. In an industry estimated to be worth over US\$70 billion, consumers are loyal and habitual purchasers of over-the-counter (OTC) self-medication products to treat their condition.

According to Nielsen, headaches are the most common complaint for consumers around the world – and may explain why analgesics are the largest category in the OTC market. Nearly half of those polled in the online survey (42%) claimed to have suffered a headache in the last four weeks, while one in three had suffered a cold, back problem or sleeping problem. One in five suffered from a cough, sore throat, stomach upset or some other kind of pain.

In Singapore, the three most suffered ailments by locals are headaches (43%), flu (38%), and sore throat (37%). In fact, when compared to the rest of the world, Singaporeans appear to be especially prone to sore throat and flu—close to four in 10 said they suffered from either of these ailments in the past month; ranking them first and second respectively on a global scale. On the other hand, 14 percent of the population claimed to be in the pink of health, with no complaints of any sickness contracted recently.

The Nielsen Company’s 47-country survey also revealed diverse regional differences among populations and their health problems. EEMEA and Latin American consumers suffer more headaches,

with more than half in these regions said they had suffered a headache within the last month.

Asians (36%) were more susceptible to catching colds than any other region and are more likely to suffer from sore throats, coughs, stomach pain and toothache than they would a back problem, unlike those in North America and Latin America.

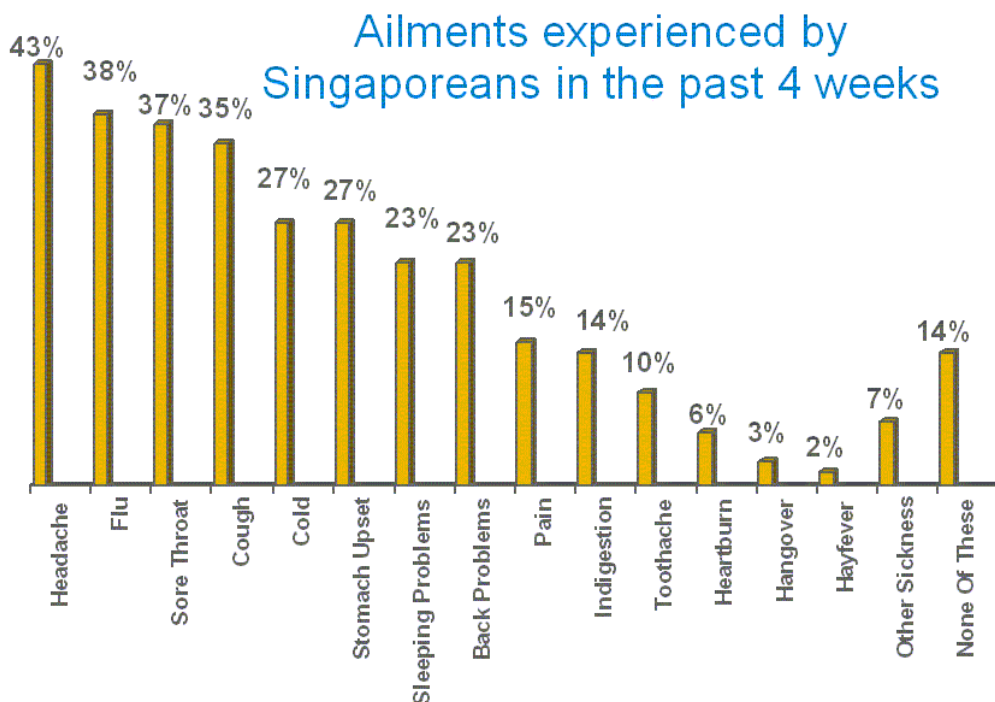
Singaporeans led the world with 37 percent suffering from a sore throat; a third of Filipinos were coughing more than anyone else; and Indonesians topped the world with 44 percent suffering flu in the past four weeks.

At the other end of the scale, Indians, Japanese and Portuguese were the healthiest consumers, with one in four claiming not to have suffered any health ailments at all in the past month.

What do people do when they fell ill?

Nielsen polled 26,486 internet users in 47 markets from Europe, Asia Pacific, the Americas and the Middle East at the end of April this year. Nearly half (42%) said they reached for their usual ‘tried and tested’ medication at home during times of ill health, and one in three either saw their doctor or visited a pharmacy in search of an over-the-counter recommendation.

Some one in 10 Singaporeans (11%) chose to ‘let nature take its course’ by not using any remedy to treat their ailment, while close to half (47%) would go see a doctor—this ranked Singaporeans second globally, after Hong Kong (51%) with the most people knocking on the doctors’ doors whenever they experience any health discomfort.



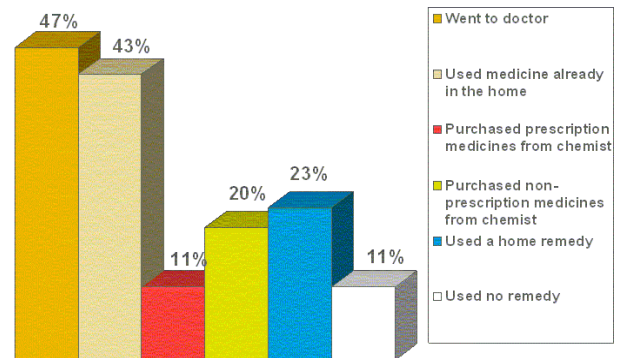
The survey findings reflect some regional differences in the way consumers treat their ailments. In North America, consumers are more likely to seek out pharmacies than visit their doctor. In Europe and Asia, a visit to the doctor came ahead of reaching for non-prescription medication and home remedies. Meanwhile, people in Scandinavia and Asia Pacific are also more likely to 'grin and bare it' – about one third in Denmark (36%), Norway (33%) and Taiwan (28%) led the global rankings for taking 'nothing at all' to cure their health complaint.

The Nielsen survey also indicates that once a consumer wants to purchase a non-prescription medicine, experience with the product/brand always counts. Overwhelmingly, the most *loyal* consumers of OTC/self medication products are Asians – over 80 percent of Hong Kong, Singaporean and Chinese consumers say they always buy the same 'tried and tested' products. Two-thirds of North Americans (68%) also say they always buy the same brand of self-medication. The other factors influenced what consumers did when they fell ill were *reliance on medical professionals*; and *deeply rooted cultural 'home remedies'* – especially in Central and Eastern European countries and throughout Asia.

It is worth noting that while one in five global consumers (19%) said they were influenced by advertising or a friend's recommendation when trying new OTC medications, people in Asia rely on OTC advertising more than any other region when making their decisions, led by China, with 39 percent of Chinese consumers - the world's highest - saying their self-medication purchasing decisions are influenced by ads.

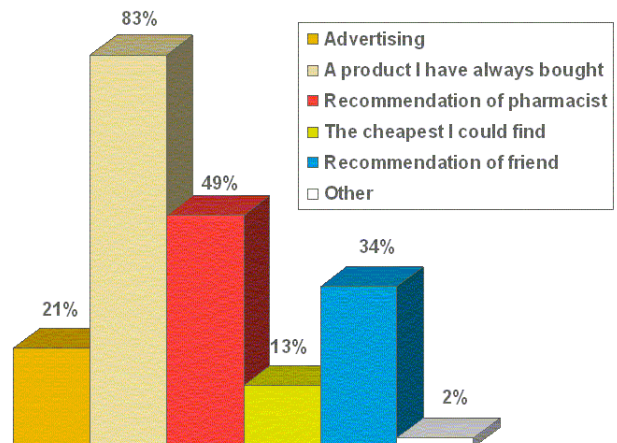
Singaporeans tend to go for the tried-and-tested method when self-medicating in times of sickness, with over four in five (83%) claiming to take a product they always used, rather than relying on other information sources such as pharmacist (49%), friends (34%), and advertising (21%).

Thinking about the ailment you had most recently, what did you do? – Singapore



Base: Singapore respondents who said they suffered from any of the mentioned in the last month

If you purchased a non-prescription medicine from a pharmacy, what factors influenced your purchase?



Base: Singapore respondents who purchased non-prescription medicine from a pharmacy/chemist

Contributed by The Nielsen Company

Starfish Launches On-Line Customer Communities in Asia

Starfish Research is bringing one of the latest phenomenons of web 2.0 research to Asia with the launch of On-line Customer Communities in conjunction with Connecticut based, Bellwether Interactive.

Customer Communities are private invitation only communities of customers or target customers that log-on to a secure website to share experiences, offer advise, brainstorm ideas, comment on market trends and help a company figure all kinds of business issues. Unlike traditional internet panels, private customer communities are smaller (typically 300-400) and involve a continuous conversation between the client and community members. Members take an active role as advisors providing input and immediate feedback on business issues.

"Insights generated from on-line customer communities do not replace the more traditional methodologies of focus groups and surveys, instead they should be thought of providing additional ways in which to engage with consumers" commented Nicholas Cameron, Managing Director of Starfish Research (Asia). "If marketing's objective is to engage in a conversation with consumers and involve them in better decision-making, then this methodology adds value."

Starfish with offices in the UK, Singapore and Papua New Guinea is a private, independent company specializing in developing creative new marketing research tools including SponsorMap™, BluRay™, Scrutineer™ and RedMantis™.

Contributed by Starfish Research (Asia)

Singapore's Traditional Media Maintaining strong Foothold in Spite of a Changing Media Landscape

Internet and Cable TV Fast Becoming Mainstream Media for Half of Singapore's Population

Despite a backdrop of evolving new media choices and changing consumer habits, traditional media continue to sustain their mass audience presence, according to the Nielsen Media Index 2007 survey. Meanwhile Internet and Cable Television, traditionally seen as 'new' or 'alternative' media, have strengthened their foothold in the mass media consumption palette in Singapore over the past years and move a step closer to 'mainstream' media status with about half the population viewing cable TV weekly and slightly more than half using Internet daily.

The Nielsen Media Index survey interviewed 4,723 respondents representative of the Singapore population, aged 15 and above.

Newspapers and Magazines

In general, Print media enjoys stable performance and remains an integral part of people's media choice set, with overall daily's *Yesterday* readership holding its place across almost all newspaper titles.

English dailies readership settled at 50 percent—a slight dip from last year's 52 percent.

Chinese dailies readership edged one percentage point up to 34 percent, mainly bolstered by the introduction of My Paper into the newspaper daily market in June 2006.

Magazine readership also continues to thrive, with the introduction of new and re-branded titles contributing to the vibrant magazine market.

Terrestrial TV

The television landscape in Singapore has experienced some exciting changes in the past year—from the increase in cable television channels to the launch of IPTV and Video-on-Demand broadband TV services like Mio TV, M2B World and MobTV. Despite the influx of changes, Terrestrial TV continues to be a staple in people's media diet in Singapore — more than eight in 10 (83%) continue to view TV *Yesterday* and 96 percent for *Past Week* viewing.

"Television has evolved in recent years in terms of new and varied content, delivery and platforms. This fragmentation, together with the changing population dynamics and the increasingly hectic and mobile lifestyle of people in Singapore presents a challenge for broadcasters to hold their audience although Terrestrial TV has so far managed to maintain its audiences," said Ms Rebecca Tan, Executive Director of Nielsen Media Research, Singapore for The Nielsen Company.

Cable TV

According to Nielsen Media Index, with a three percentage point increase recorded from last year, almost half of the Singapore population (48 percent) is now subscribing to Cable Television. *Past Week* Cable viewership increased by over two percentage point to 47 percent, while yesterday viewership also increased from 35 percent to 37 percent.

Internet Usage

Like Cable TV, the Internet is another medium that casting off its 'new/alternative medium' status and becoming a permanent fixture in the lives of the average person in Singapore, as more and more people access the Internet on a daily basis. Broadband usage at home and Wireless Internet usage in the *Past Year* also continue to see growth.

One in two (51%) people reported *Yesterday* usage, while almost three in five (58%) claimed to use the Internet in the *Past Week*. Registered increments for *Yesterday* usage were not only seen among the young and affluent but across all major occupation groups.

"The Internet has truly become embedded into people's lifestyles, with users not only from the PMEBs and student groups, but among the masses such as the Blue Collars and Housewives," said Ms Tan.

Radio Diary Survey

Radio listening among Singapore population appeared to be stable with *Past Week* listening at 95 percent, according to Wave 1 of Nielsen's Radio Diary Survey 2007. Both Chinese (54%) and English (44%) radio stations' listening recorded an improved performance in this wave.

Cinema

Going to the cinema remains a popular outdoor entertainment activity in Singapore. One in five people (24%) continue to visit the cinemas on a monthly basis, while 16 percent (+2% point) are going more regularly, on a fortnightly basis. *Past Week* cinema viewing maintains at 10 percent, with students (33% of past week cinema goers) and PMEBs (28% of *past week* cinema goers) continuing to form the bulk of its audience.

About Nielsen Media Index

Nielsen Media Index, a syndicated survey, is the print currency for media owners and advertising agencies. It provides demographic, lifestyle and general media consumption information on the adult population aged 15+ in Singapore.

Contributed by The Nielsen Company

TNS Introduces 'Six Degrees of Online Quality' System at ESOMAR Panel Research 2007 Conference

TNS is urging the market research industry to continue seeking ways of delivering maximum quality in online research and has introduced a new global quality program called the 'Six Degrees of Online Quality'. To be implemented by TNS in 2008, the 'Six Degrees of Online Quality' covers all phases of the research process from panel recruitment methods to validating the quality of the final results.

Speaking at the ESOMAR Panel Research 2007 Conference in Orlando, Florida today, Jon Briggs and Mark Walton – both TNS regional directors for online research in Asia Pacific, Latin America, Middle East and Africa – underlined that effective online research can only be delivered through an integrated and rigorous quality programme, covering every stage of the research process.

Specifically, TNS recommended these 'Six Degrees of Online Quality' procedures should be embedded into the online research process:

Building a panel: adopting a variety of techniques to carefully analyse the calibre and motivation of every single person joining a panel.

Panel management: applying long-established best practice to actively manage panels through initiatives such as capping panel sizes, removing inactive panel members, and ensuring participating members are properly motivated.

Sampling techniques: delivering balanced, qualified, eligible and relevant samples to best meet the needs of particular projects.

Questionnaire design: ensuring that the wording, content and overall strategy of a survey contributes to higher data quality, and that protocols are in place to facilitate accurate completion of long surveys.

Quality of data captured and reported: vetting the locations of survey participants and how long they spend in completing a survey, and checking surveys visually to ensure the questions have been carefully answered.

Panel reporting: providing clients with a breakdown after a survey is completed of key quality metrics such as the response rate and the number of participants that were rejected either at the panel recruitment stage or at a later phase in the survey.

Jon Briggs, TNS Regional Director, 6thdimension™ Interactive Research, said: "As the leader in customized research and the industry's leading online access panel company, clients expect that we will deliver a panel that is fully representative of the population they are measuring.

TNS is leading the industry in implementing the highest level of quality with regard to building and maintaining panels. However, in addition to the quality of our panels, TNS believes it is just as important to have standards around other aspects of the studies we develop for our clients, including questionnaire design and data reporting. In the end, clients expect us to deliver the highest level of quality throughout the entire process – end to end. As the industry develops new approaches to conducting online research such as online communities and using customer and employee databases, it is just as important that this 'end-to-end' approach to quality is fully developed and implemented."

Mark Walton, TNS Regional Director, 6thdimension Interactive Research, said: "Achieving quality throughout the online process is critical for our industry and TNS fully supports the work of ESOMAR and other organizations (such as the recently formed ARF Online Research Quality Council*) in this area. The 'Six Degrees of Online Quality' procedures we are recommending reflect the experience we have gained in a range of emerging markets – such as China, Hong Kong, Korea, Malaysia, Thailand, Singapore, South Africa, Saudi Arabia, Taiwan and the United Arab Emirates. We have also found that the processes we have developed are equally applicable to more established markets such as Australia, Europe, Japan and the United States."

TNS's online access panels – known as 6thdimension™ access panels – have a strong global footprint. The operation is co-ordinated out of three 'centers of excellence': Toledo, Ohio supporting North America; Amsterdam supporting Europe; and Hong Kong supporting Asia, Pacific, Latin America, Middle East & Africa. With panels to be added in 2008 in several new markets, TNS 6thdimension access panels will soon operate in up to 30 countries and will comprise some 3.6 million panelists.

Contributed by TNS

Five Clear Affluent Consumer Groups Emerge in the Latest PAX Survey

Synovate PAX media survey in its 12th year now, continues to be the currency for upscale audiences in Asia Pacific. In the latest round of data release (up to Q2, 2007), distinct consumer groups emerged from the first-ever segmentation analysis. PAX respondents across Asia Pacific can be segmented into five clear groups, each with differing attitudes, media and product consumption patterns. This analysis is based on 10 markets across the region - Hong Kong, Singapore, Korea, Taiwan, Thailand, Malaysia, Indonesia, India, the Philippines and Australia.

The Work to Live's - Lifestyle-oriented, green and socially aware

- 28% of affluent Asians
- 21% of affluent Singaporeans

Successful, well-educated and affluent, this group is arguably the best at achieving a work-life balance. These consumers work to live, not live to work.

Most likely to be aged 45 plus, these people are Business Decision Makers and 27% of them have a post-graduate degree. They are more likely to be from Australia, India and Seoul.

The HUMmers (Hungry, Urban and Mobile) - Screen-dependent, striving and relentlessly positive

- 15% of affluent Asians
- 8% of affluent Singaporeans

This segment tends to be Young, hungry, career-driven, urban, mobile and upbeat. They are always striving, very positive about life, very well-educated and constantly in touch via mobiles, laptops, PDAs, etc.

More often found in developing markets like India, Manila and Jakarta, these 25-34 year olds don't yet own too much, but if it's convenient and represents a fast-track to the top, they'll own it soon! They have a high intention to purchase household products, personal products, accessories and leather, with 17% stating intent to buy a laptop and 15% intent to buy mobile phone with internet access in the next year.

The Luxury Loyalists - Comfortable, conservative and wealthy

- 12% of affluent Asians
- 6% of affluent Singaporean

Nearly half this segment is aged 45 years or more. While strongly skewed towards women (57%), there are also men in this group who share similar attitudes and consumption patterns. Two thirds of people in this segment are married with children and they tend to not work.

They have a very high ownership of luxury products like jewellery, watches, designer footwear, leather and accessories. Interestingly, if they do go for technology, it tends to be from the 'luxury' end of the technology spectrum.

The Gimme's - Fashion-conscious, acquisitive and privileged

- 25% of affluent Asians
- 29% of affluent Singaporeans

Aged largely 25-34 years old, they are from developed, urban areas like Hong Kong, Singapore, Kuala Lumpur and Seoul, and are very focused on their privileged world. They are skewed towards female.

They enjoy the second highest average household income of the segments and their money clearly goes on living a luxurious lifestyle. This group is focused on fashion and they have the highest levels of ownership of luxury products, specifically designer clothing, accessories, leather products and jewellery.

The Executive Warriors - International, quality-conscious and on-the-move

- 21% of affluent Asians
- 36% of affluent Singaporeans

The Executive Warriors are typically top income earners, found in large companies (37% are in companies of 300 or more people), are skewed towards male and mostly found in Taipei, Singapore, Hong Kong and Bangkok. Majority of them work full-time, are well-educated and have the highest ownership of all the segments when it comes to household and personal products.

On the move for business, the Executive Warriors need to stay current. They have a high viewership of television, especially cable and satellite, and are also very likely to view TV content on their computer. They have high readership levels for regional print media as well. They value international perspective (47% strongly agree versus a regional average of 32%) and find regional media to be more insightful.

Contributed by Synovate

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