

Dear Members,

Our quarterly newsletter is back.

In this issue, we cover consumer confidence in Singapore and consumer trends in Asia on products ranging from small domestic appliances, household appliances to mobile phones. There is also an article on using interactive techniques to engage online respondents.

The Asia Pacific 2011 ESOMAR Conference is happening in Melbourne 20-22 March. ESOMAR has kindly agreed to extend to MRSS members a 15% discount. The promotional code for all MRSS (paid up!) members is MSS\_APAC\_2011. For more details on the event, go to the ESOMAR Website <http://www.esomar.org/index.php/asia-pacific-2011-overview.html>

The MRSS Asia Research Conference is back again. This time we discuss how market research needs to change to reach out to a rapidly changing market place. Consumers are now savvier, wealthier and more technologically advanced. How do we continue to read and understand them to help our clients reach out to them?

As with the last conference format, there will be two workshops and an exciting day of conference with client & agency speakers covering a range of subjects. Conference rates start at \$300 for MRSS members. Get the most updated details from the MRSS website <http://www.mrssingapore.org.sg/>. Thanks to returning Platinum Sponsor **RESEARCH NOW**, our Cocktail Sponsor GMI, Gold Sponsors Toluna and iLink and Silver Sponsor Synovate.

See you there 6-7<sup>th</sup> April, at the Fairmont Hotel.

MRSS Committee



## NEWSLETTER

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# Future Fundamentals

## The Transformation of Market Research

6th-7th April 2011 • Fairmont Hotel, Singapore

### About this Conference

For years marketers have controlled the dialogue with consumers but, undoubtedly, the tables have now turned. The on-going challenge for researchers is to reconnect marketers with consumers in Asia – new tools, new methodologies, new thinking. We have to be innovative to be relevant.

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market  
research  
society  
SINGAPORE

This third instalment of the Market Research Society Singapore's Asia Research Conference is set to showcase new thinking and methodologies for the rapidly changing landscape within our industry. With a wide array of speakers from within the industry, from clients, as well as thought leaders from across the globe, this year's conference is sure to be the premier networking event for market researchers in Asia.

The gathering kick's off with two half-day workshops, the first featuring last year's Best Paper Award Winner Nic Hall of TNS along with Joel Cere of eYeka looking at Research in the Facebook Era. The afternoon session features Sue York from The Future Place, who will be joining us from Brisbane to talk about social media and its uses in market research.

The following day is the main event with a full-day conference beginning with three presentations in the morning. Firstly, Han Zantingh from BrainJuicer comes to us from Shanghai to talk about opportunities awaiting us on the horizon. Anupam Bhargava of Millward Brown will look at combining the latest in neuroscience with more traditional market research methods to gain extra insight. And ESOMAR President Finn Raben will address the delegation before we head into the first networking break.

The second morning session opens with Kim Walker of Silver, shedding light on the growing silver segment. Jonathan Pulestone of GMI and Daniel Hall of Sony Music will then discuss a recent case study in online research. We then break for a networking luncheon.

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After another break, we come back to hear the story of growing Singapore's Tiger Balm from Executive Director AK Han. A client panel of research buyers will discuss changing research needs in their respective industries and answer questions from the delegate floor. Lastly our distinguished keynote speaker, business strategist and author Martin Roll or the Martin Roll Company will take a hard look at the need for truly global Asian brands.

The event closes with a final cocktail reception giving delegates a last chance to meet and greet our speakers, panellists, and client attendees.

Research Now are back on board as the generous Platinum Sponsor for the third year running. GMI has sponsored the post-conference cocktail party and Toluna & iLink have given their support as Gold sponsors. Sponsors will be available at the exhibition floor during all breaks for networking and information sharing.

This event is a great opportunity for MRSS members to interact with industry players and buyers from not only the region but globally as well. We hope to see you there!

## Confirmed speakers include:



### Martin Roll

Business & Brand Strategist, Martin Roll Company  
Author of "Asian Brand Strategy"

Global Asian Brands: Myth or Reality?



### Han Zantingh

Managing Director, Asia, Brainjuicer

Emotion: A Leading Indicator of Success and a Guide to Opportunity



### Kim Walker

CEO, Silver

The Future is Silver, Rethinking Ageing Consumers



### AK Han

Executive Director, Haw Par Corporation Limited &  
Director & General Manager, Haw Par Healthcare Limited

Tiger Balm 100 Years and Beyond: Our Challenges and Experiences



### Professor David Thomson

Chairman & CEO, MMR Research Worldwide

The Science Behind Consumer Choice

### Anupam Bhargava

Director, Millward Brown, Singapore

Cutting Edge Neuroscience: Sharpened by  
Traditional Methods

### Finn Raben

President Esomar

Market Research Organisations in a Networked Age

### Sanja Burns

Head of Consumer Understanding,  
APAC, Flavours, Givaudan Singapore  
Pte Ltd

Skiing Uphill

### Jonathan Puleston

Vice President of GMI Interactive,  
GMI (Global Market Insite, Inc.)

### Daniel Hall

Insight Manager, Sony Music UK

Sony Music – A Fresh Innovative Approach to  
Online Research

### Siva Ganeshanandan

APAC GM of Autonomy Optimost

Market Research Based on Actions Rather  
Than Opinions

Join us for the 2011 MRSS Asia Research Conference,  
6th-7th April at the Fairmont Hotel, Singapore.

## 5 easy ways to register

Phone : +65 9662 0125  
Fax : +65 6536 7166  
On-line : [www.mrssingapore.org.sg](http://www.mrssingapore.org.sg)  
Email : [emilyong@mrssingapore.org.sg](mailto:emilyong@mrssingapore.org.sg)  
Post : Market Research Society Singapore  
Attn.: Emily Ong  
50 Market Street, #10-02 Golden  
Shoe Carpark, Singapore 048940



## **NIELSEN: CONFIDENT CONSUMERS IN SINGAPORE CONTINUE TO SPEND**

*Consumer Confidence Index Stabilizes at 113 Index Points*

*One in Ten Singaporeans Feel that the Nation is in a Recession*

**SINGAPORE – November 2, 2010** – Confidence among consumers in Singapore is unwavering as the nation reports a Consumer Confidence Index of 113 in Q3 2010, according to the latest edition of the Nielsen Global Consumer Confidence Index. Consumer Confidence Index levels above and below a baseline of 100 indicate degrees of optimism and pessimism. Despite gaining just one index point from 112 in Q2 to 113 this quarter, Singapore has been enjoying positive consumer sentiments since Q4 2009. In this quarter, 72% percent said the state of their personal finances is good or excellent, and one in two said this is the right time for them to buy the things that they want. Only 11% felt that the economy is in a recession.

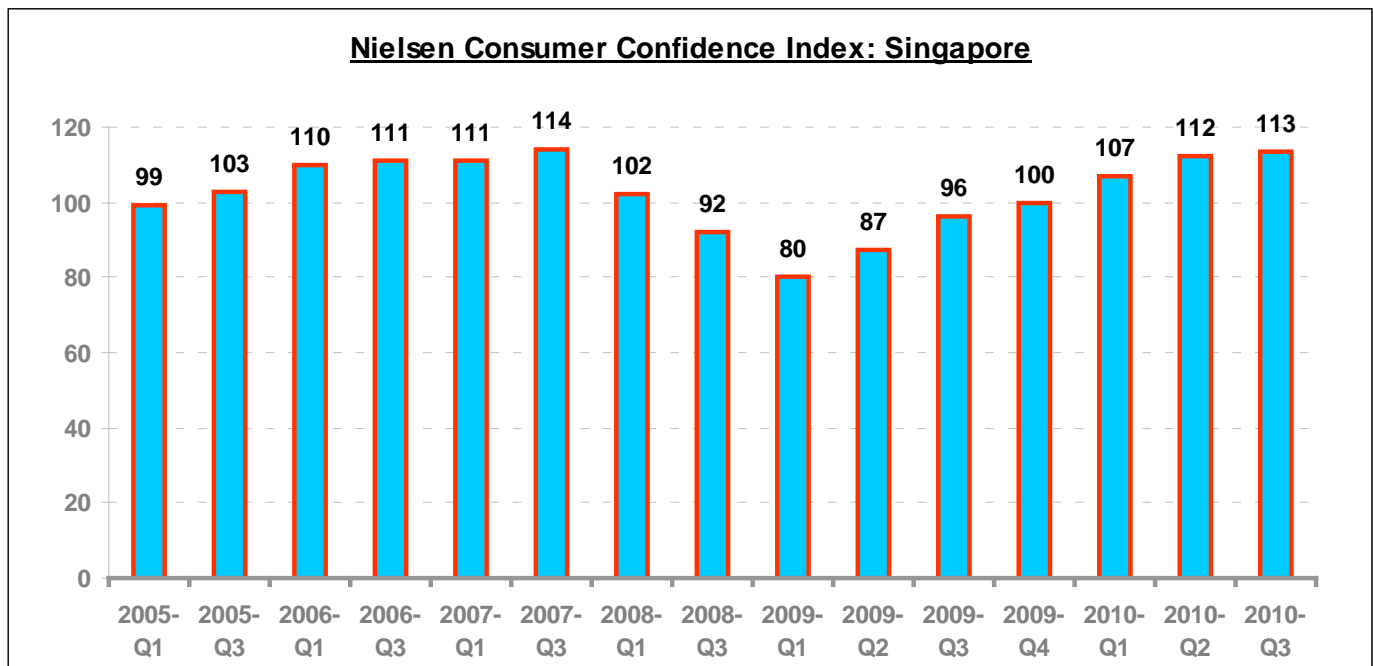
### **Asia solidifies its spot as one of the most confident regions**

Nine out of the top 10 most confident nations hailed from Asia Pacific countries: India (129 Index points), Thailand (117) and Australia and Indonesia (115),

Philippines (114), Singapore (113), China (104) and Malaysia and Hong Kong (103). Asia Pacific was the world's most confident region reporting an Index of 98, followed closely by Middle East/Africa at 97 points. Thailand posted the biggest quarterly confidence jump to an Index of 117 in the third quarter.

"The sustained consumer confidence over the last few quarters has translated into growth of FMCG sales by 12% in the Asia Pacific in the second quarter of 2010, rebounding from a general decline in growth rates for most markets in 2009," said Joan Koh, Managing Director, The Nielsen Company Singapore.

The outlook is however less rosy in the other markets in the latest round of the survey conducted between September 3 and September 21, 2010. While positive sentiment drove confidence levels up in the first half of this year, consumer confidence declined in 20 of 53 global markets in the third quarter, and most markets showed continued spending restraint.



**Savings, holidays and new clothes are top items to spend on**

After covering living expenses, Singapore consumers will put their spare cash into savings (69%), holidays/trips (60%) and new clothes (35%). These numbers are above the global average where 49% of respondents will put spare cash into savings, and 33% will spend on holidays/trips. Fifty-one percent of Singapore respondents feel that now is a good/excellent time to buy things, compared to the global average of 35%.

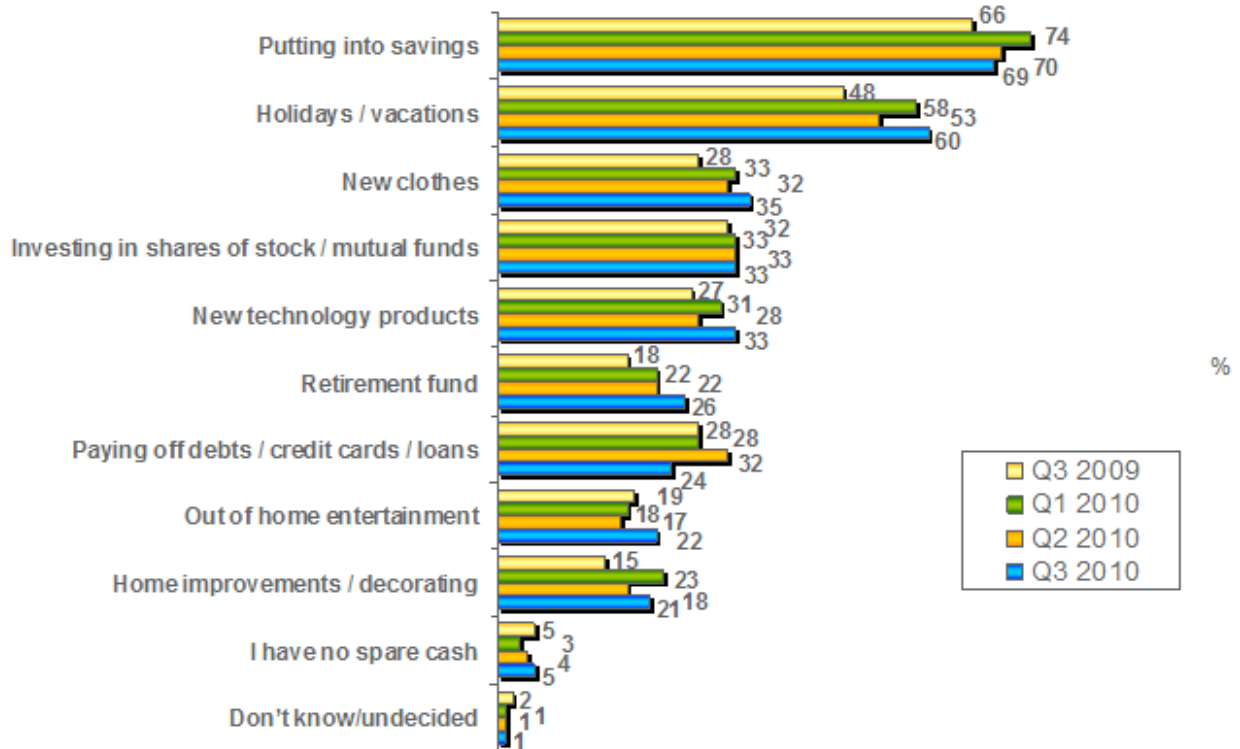
“With the improving consumer sentiment, consumers are looking to spend their spare cash on non-essential categories. We see an increase in the proportion of

respondents who will spend on holidays, out-of-home entertainment, new clothes and technology products, compared to the last quarter,” added Koh.

“Recent launches for technology products such as the iPad, MacBook Air, Windows Phone 7 OS, the influx of android phones, as well as affordable data plan packages offered by telecommunication providers to increase their subscription base, may have made it more attractive for consumers to spend on technology products.”

“While the proportion of those who intend to save remain fairly constant, more respondents are also looking at building their nest egg by investing in retirement funds,” said Koh.

## How to utilize spare cash after covering essential living expenses - SG



Base : All respondents n=504

### Rising Concerns

Work-life balance remains the number one concern as mentioned by 16% of respondents. This quarter, rising food prices have inched its way up to second key concern at 12% for consumers here. Across Asia Pacific, one in five consumers are most concerned about rising food prices—an increase of 13 points compared to the second quarter, followed by work-life balance (13%).

### About the Nielsen Global Consumer Confidence Survey

The Nielsen Global Consumer Confidence Survey was conducted between September 3 and September 21, 2010 and polled over 26,000 consumers in 53 countries throughout Asia Pacific, Europe, Latin America, the Middle East, Africa and North America about their confidence levels and economic outlook. The Nielsen Consumer Confidence Index is developed based on consumers' confidence in the job market, status of their personal finances and readiness to spend. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of ±0.6%.

## ECONOMIC RECOVERY SEES MORE CONSUMERS GOING 'GREEN' AND PURCHASING MORE SOPHISTICATED HOME APPLIANCES: GfK Asia

*Major Household Appliances Industry across Nine Asian Market Grew 23 percent*

**December 21, 2010, SINGAPORE** – Thanks to the economic recovery, increasing spending power of consumers in the region has been a boon to many industries, including the major household appliances sector which has managed to bounce back from its weakened performance of yesteryear.

GfK Asia findings across nine Asian markets—Singapore, Malaysia, Thailand, Hong Kong, Taiwan, South Korea, Philippines, Vietnam, and Indonesia revealed an exponential increase of 23 and 19 percent respectively in overall sales and volume compared to a year\* before, with various markets even registering more than 50 percent growth.

“With Asia leading the growth in home sales globally, it is not surprising to see heightened demands for household appliances in this part of the world as well. Developing economies in the region such as Indonesia and Philippines experienced the greatest growth with consumers here spending over 60 percent more on major home appliances,” said Ms Jasmine Lim, Regional Account Director for Home Appliances at GfK Asia. “Surging demands also spurred price hikes in majority of the markets surveyed where average prices rose by 10 percent or more, with countries like Singapore and Indonesia hitting 19.5 and 14.5 percent growth respectively. (Chart 1)

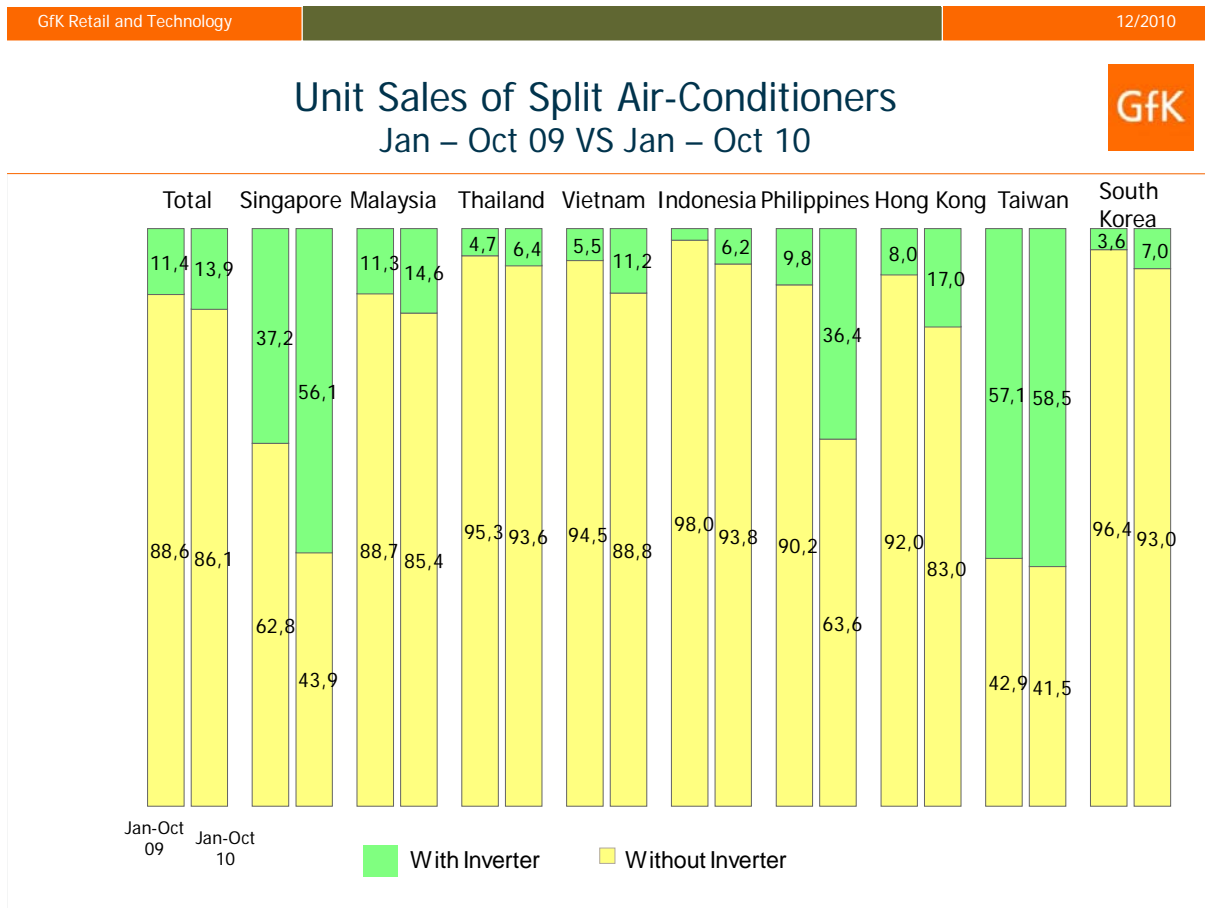
Chart 1:



According to GfK findings, a key appliance which contributed to the good performance of the industry was air-conditioners, selling over 25 percent more in units and raking in 24 percent more in dollar value in the past 12 months. Among all the countries surveyed, the top three markets which spent the most on air-conditioners, out of their total household spend on major home appliances were Taiwan (51.3%), Hong Kong (44.6%), and Singapore (42.8%).

“Besides an intense and early onset of summer in some of the markets which has led to increased air-conditioner sales, we also observed more household buying the more expensive inverter type air conditioners—reflecting growing awareness of consumers towards its environmentally-friendly and energy conservation benefits,” highlighted Ms Lim. “This trend is especially gaining prevalence in Taiwan, where nearly three in five (58%) of all air-conditioners bought are inverter-types.” (Chart 2)

Chart 2:



Another emerging trend brought about by increasing spending power is consumers' preference to purchase more sophisticated, higher-end products. "For instance, our report is showing shifts in buying patterns in washing machines from double tub to single tub, from top to front loaders, and also upgrading to higher capacity models," observed Ms Lim. (Chart 3)

Yet another example of consumers' upgrading to higher-end appliances is reflected in the refrigerator segment. In developing markets, two-door top freezer type are gradually replacing the one-door model, while in more affluent economies, there is a rising interest towards the niche segment of multi door refrigerators.

"Consumers these days are more well-informed and conscious about environmental issues, thanks to global activities such as Earth Hour and other government campaigns to raise awareness of its importance," said Ms Lim. "As such trends persist, we

can predict that the future of the home appliance industry will significantly be shaped accordingly and we can expect more environmental friendly appliances occupying a substantial proportion of the market," Ms Lim concluded.

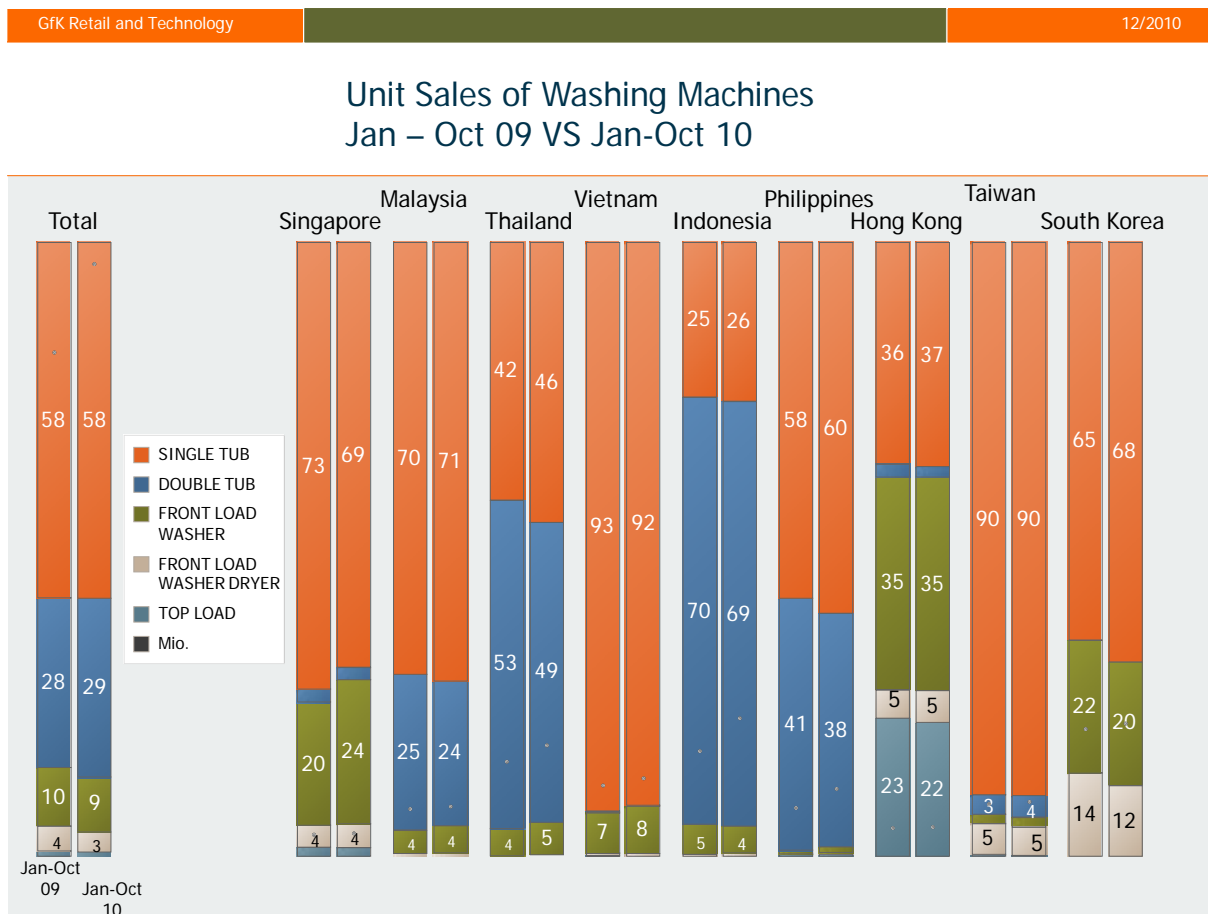
**About GfK Retail Panel**

The GfK Retail Panel is a regular survey monitoring sales of specific products and product categories, using a range of Internet, retail outlets and companies to provide trade and industry highly accurate and up-to-date information on various segments of the market, including technical consumer equipment, optics, and automotive.

**\*Notes:**

Survey period is Jan– Oct 10 vs Jan – Oct 09

Chart 3:





**SMARTPHONE VALUE SHARE REACHES NEARLY 50 PERCENT IN THIRD QUARTER AT USD1.48 BILLION : GfK Asia**

*Android overtakes Symbian in quarter three as the war of the mobile operating systems continues*

**November 23, 2010, SINGAPORE** – Popularity of smartphones continues to skyrocket with one in every five handsets being purchased in the Asia region\* in the last quarter (Jul-Sept10) being a smartphone.

growth in Asia in the last 12 months\* with over 4.7 million units of smartphones worth over USD1.48 billion being retailed in quarter three this year. It now occupies nearly half of the entire handset sales pie. (Charts 1 & 2)

According to leading market research company GfK Asia, smartphones continue to register exponential

Chart 1:

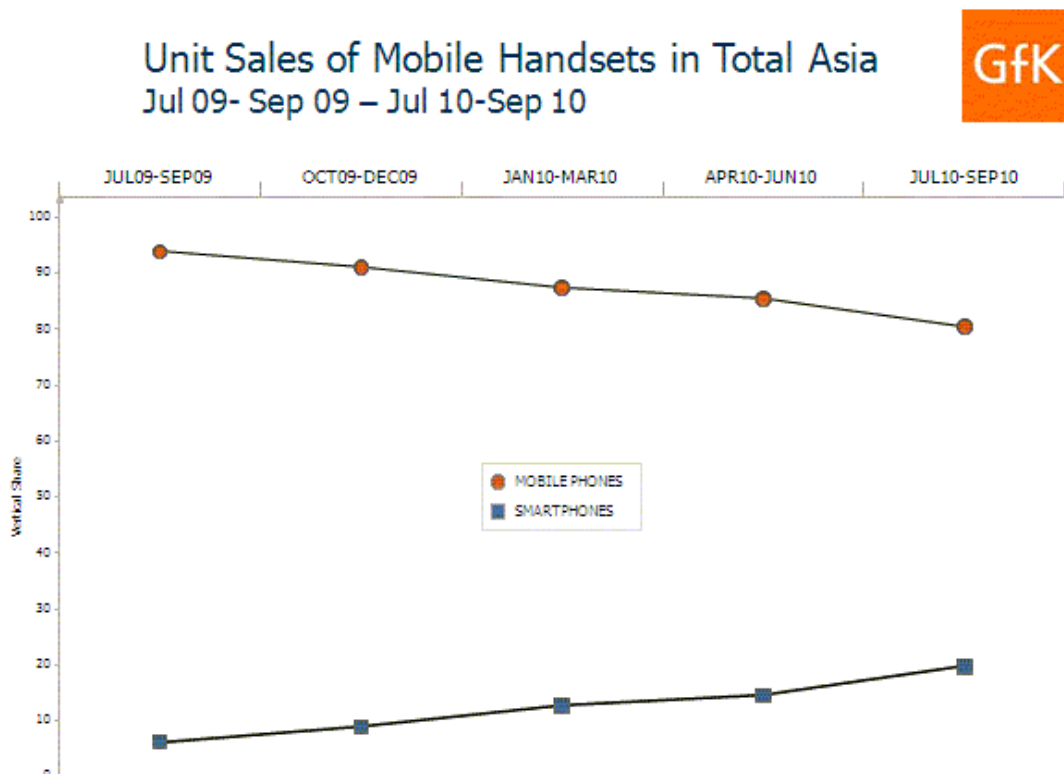
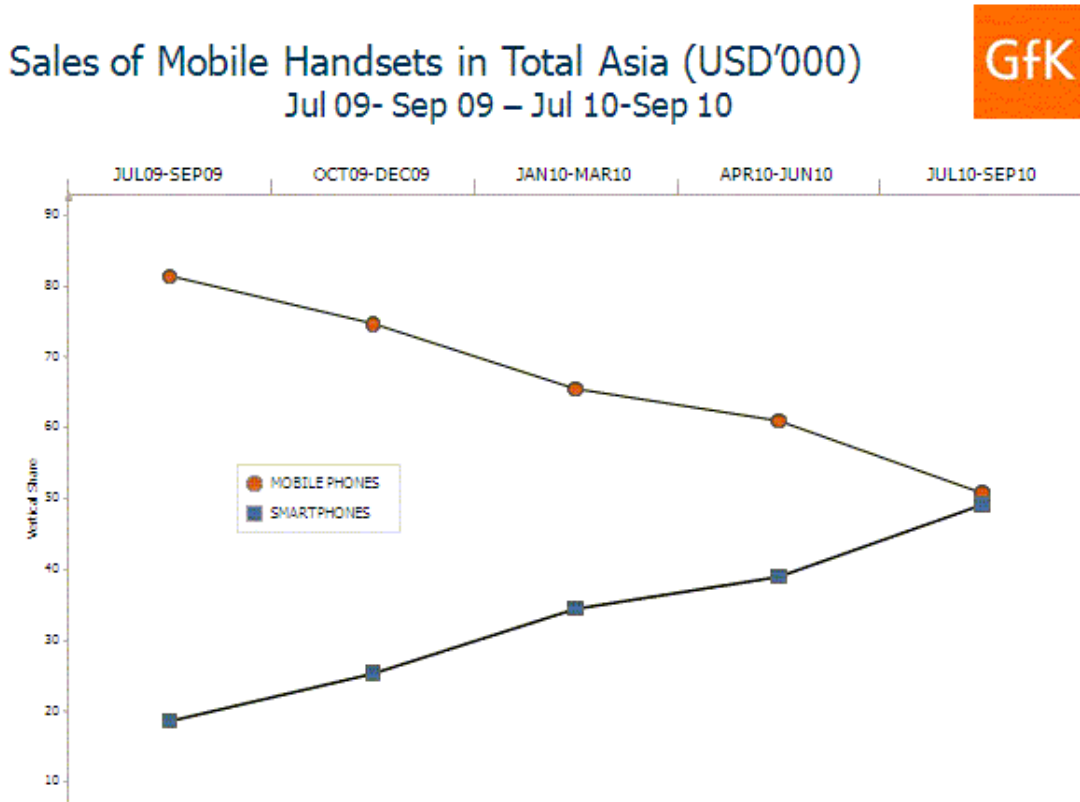


Chart 2:



“Smartphones are the key drivers of the telecommunications industry at this moment. GfK’s retail audit findings are showing impressive, almost three-fold increase in value of the industry when we compare sales figures from the latest quarter to the same quarter\* a year ago,” said Mr Gerard Tan, Regional Account Director for Telecommunications, GfK Asia Pte Ltd.

“While only 1.27 million smartphones were sold in the third quarter of last year, over 4.7 million units were

“Our Q3 report shows that Android has recently overtaken Symbian as the most popular smartphone OS in the context of Asia as a whole, in both value and unit sales. However, it is interesting to note the difference in OS trends when we look at findings in North and Southeast Asia separately,” highlighted Mr. Tan.

sold in the same quarter this year, signifying a growth of nearly 270 percent!” (Chart 1)

With the rapid rise of smartphones, an operating system (OS) war is also heating up among major manufacturers in Asia who are scrambling to introduce their smartphones on a more popular and user-friendly platform. Symbian, previously the leading OS since the second half of last year, is facing intense competition from the Android OS which has been registering strong growth in the second and third quarters of 2010. (Chart 3)

In North Asia, the smartphone OS competition is probably at its most intense as OS shares fluctuate vigorously in reaction to strategic and tactical initiatives from major manufacturers. Growth of the Android OS started escalating at the beginning of 2010 and managed to overtake iPhone OS, the second most popular platform in quarter two this year. (Chart 4)

Chart 3:

### Sales of Mobile Handsets in Total Asia by OS Jul 09- Sep 09 – Jul 10-Sep 10

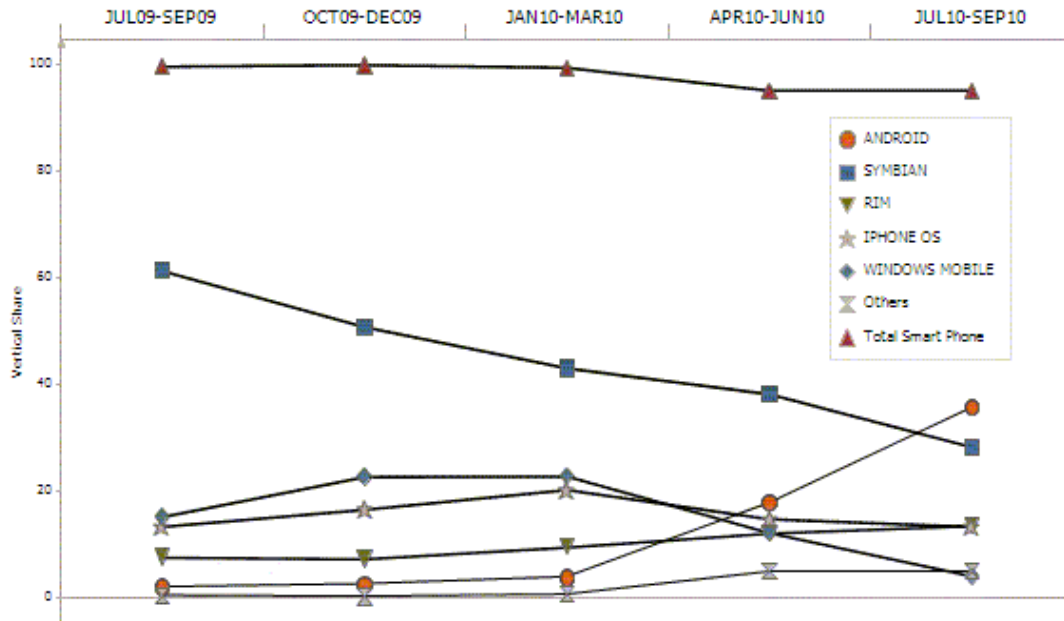
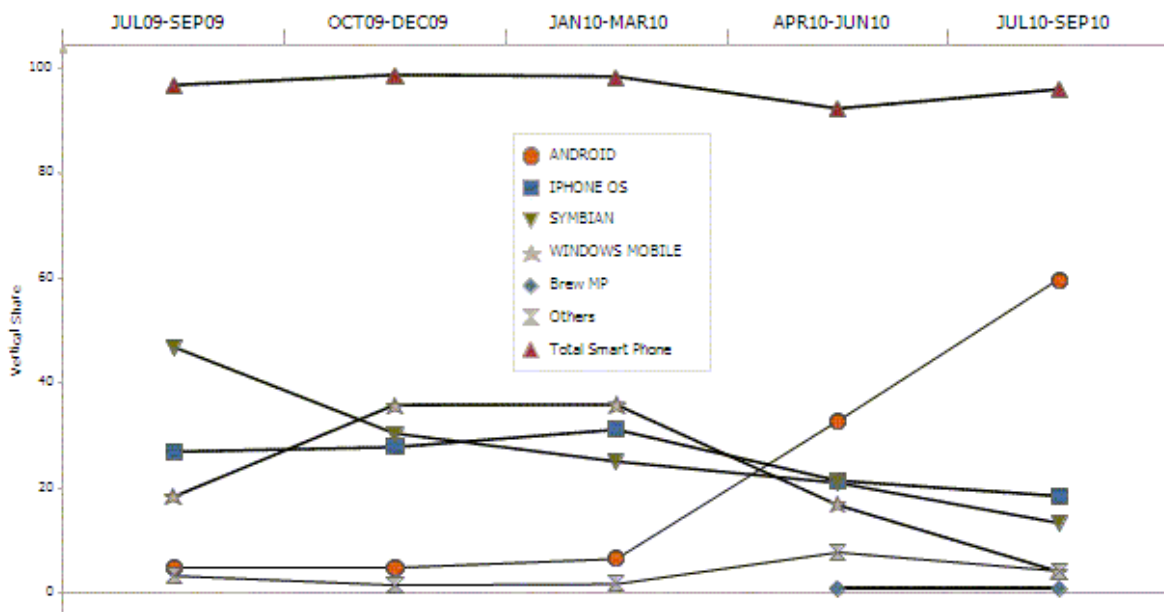


Chart 4:

### Sales of Mobile Handsets in North Asia by OS Jul 09- Sep 09 – Jul 10-Sep 10



In the Southeast Asia region however, Symbian has been the leading smartphone OS and continues its lead albeit gradually declining sales. Since the beginning of the year, Android, RIM and iPhone OS have been enjoying gains in the smartphone segment at the expense of Symbian OS. (Chart 5)

“With the myriad of mobile operating systems available in the Asia market right now, manufacturers have to look beyond hardware to succeed in this market!” concluded Mr. Tan

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**\*Notes**

**Survey coverage:**

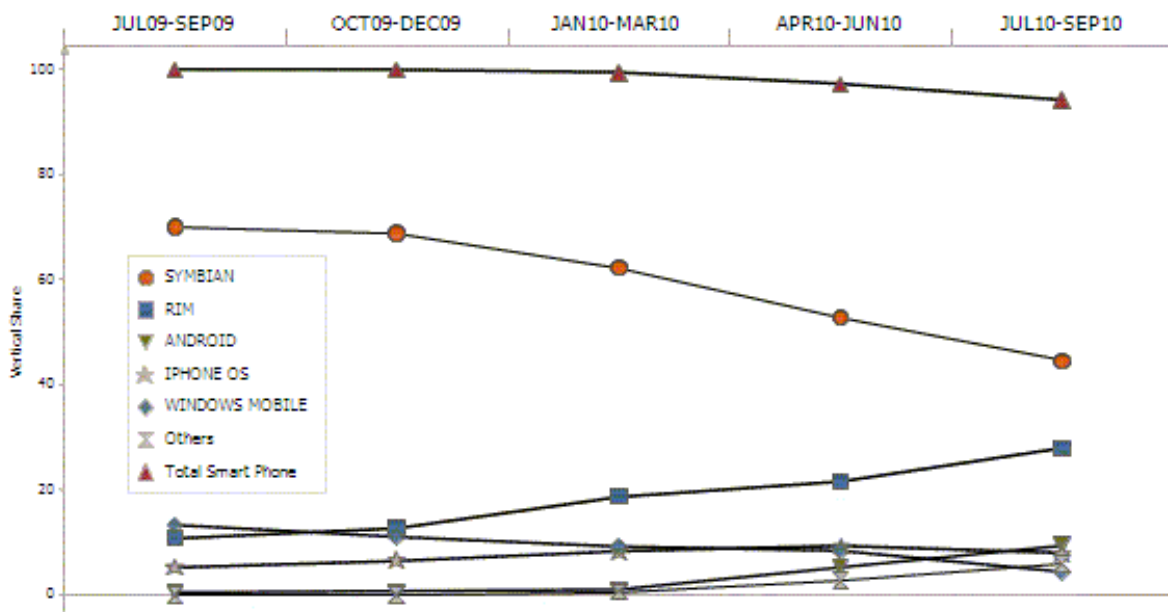
- North Asia refers to Hong Kong, Macau, South Korea and Taiwan
- Southeast Asia refers to Indonesia, Cambodia, Malaysia, Philippines, Singapore, Thailand and Vietnam
- Total Asia covers both North Asia and Southeast Asia

**Survey period:**

- 12 month survey period: Jul 09 – Jun 10
- Latest quarter comparison: Q310 vs Q309 (Jul-Sep months)

Chart 5:

Sales of Mobile Handsets in Southeast Asia by OS  
Jul 09- Sep 09 – Jul 10-Sep 10



## The 10 essential points on leveraging interactive techniques to engage online respondents - GMI



Ever since 1999, GMI (Global Market Insite, Inc.) has been amongst the pioneer in this field, empowering researchers and marketers across APAC, EMEA and the US with online survey solutions aimed at improving the quality of responses. Over the past three years, the GMI Interactive team has conducted over 100 research experiments, with more than ten thousand respondents, to learn how to improve data quality from online surveys by making them more engaging.

Christine Tan, oversees GMI's expansion of business development and operations across South East Asia. Tan points out, "We basically aim to alleviate boredom as the respondents work their way through the survey. Our research revealed, within a 15-minute survey, a 38% increase in straight-lining occurs and up to 40% decline in responses to open-ended questions." Tan states, "Engagement is the key. Human are adept at engaging respondents, and there are standardized models of behaviour when being interviewed by a human that are easily bypassed online."

Below is a ten-point summary of what we found to be useful.

**1. Think of a survey as a piece of communication.**

Many people likened online surveys to insurance forms – often dull and very badly designed. The importance of aesthetics is often overlooked, but increased visual appeal, fluidity and ergonomics reduces the dropout from some surveys by as much as 75%. The design of an online survey should abide by the same standards as communication in any other media: would you deliver a PowerPoint presentation to fifty people in black-and-white, using solely the 12-point Verdana typeface, with 20 bullet points on a page, and get your IT department to create it? Probably not. So why would that be acceptable for an online survey, where you might be talking to ten times as many people?

**2. Beware of standard grid questions.** These are the primary cause of dropout in online surveys. Mixing these up with a range of more animated interactive question types, including drag and drop, sliders, and scrolling format questions, can reduce levels of straightlining by up to 80%, and double survey experience rating scores.

**3. Focus on the introduction to a survey.** Most people drop out of surveys at the very start, and as many as half of respondents do not read the initial instructions properly. It is very important to make

the introduction to a survey as welcoming and engaging as possible. An animated introduction, or a mini-presentation outlining the aim of the survey, can drastically improve respondents' attention levels, and improve the quality of feedback by as much as 50%.

**4. Use imagery to stimulate the imagination.**

Nearly any cognitive task in an online survey can be improved by using imagery. For example, when asking respondents to recall advertising on TV, simply showing a TV set encourages greater recall. Similarly, when asking about foods respondents hated to eat, an image of someone expressing disgust triggered 60% more feedback. Images stimulate the imagination and increase respondents' enthusiasm for answering questions.

**5. Apply basic social psychology techniques.**

For example, many respondents don't know how much is acceptable to write when giving open-ended feedback. Simply showing them an example of what someone else has written helps establish a social norm they are more likely to adhere to. Also, autocratic conditionality, with warning messages about non-answering, is a big turn off for respondents, but the phrase "this part is voluntary" can act as a powerful encouragement for respondents to do extra work.

6. **Learn from qualitative research.** Many common techniques used in qualitative research can be successfully adapted to improve online survey response. For example, role-play and projective methods greatly increase respondents' involvement in a task. Allowing people to read and evaluate other respondents' feedback, as they would in a focus group, can also really draw people in.
7. **Work on the wording.** The tone and style of language used is crucial in engaging respondents. An online survey littered with "research-speak" is certain to make many switch off and tune out, whereas friendly and simple wording can have the opposite effect. Phrases like "every little detail helps", and "we would be really interested to know", encourage greater feedback.
8. **Take a break.** Changes of topic within a survey can help restore respondents' attention, especially with a bit of fun. Respondents can give 30% more answers to a question if they feel mentally refreshed.
9. **Embrace the innate desire to play.** Respondents tend to put more effort into answering questions that are more fun or seem more like games. Phrases like "we challenge you..." can double the time people spend thinking about and answering a question.
10. **Remember that the feedback from respondents is elastic.** Stimulating respondents in the right way can improve the level of feedback to an amazing degree. In our experiments, we achieved a six-fold increase in the volume of feedback simply by asking questions in different, more engaging ways.

Tan further adds, "Our research reveals, 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."

Suddenly, online emerges as a platform for more qualitative research.

## *EVENT – Future Fundamentals The transformation of market research*

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## OTHER ANNOUNCEMENTS

### **Cegedim Strategic Data expands China promotion audit in 2011**

*Rep levels compare to major western markets*

**Paris, December 15, 2010** – Cegedim Strategic Data (CSD), leading provider of integrated healthcare research, expands China Promotion audit in 2011.

From January 2011, CSD will increase its audit of pharmaceutical sales force and marketing channel promotion from 10 to 13 cities, and will also increase the number of specialist panels from 17 to 19 adding Infectious Diseases and Rheumatologists. Third quarter 2010 results from the current audit of 17 different hospital specialist panels reveal that China now ranks 4th in volume of rep calls among 39 audited countries and 3rd in total full time rep equivalents (FTE), behind the US and Japan.

“We’re now seeing comparable sales force levels that place China in the top tier worldwide along with the major 5 Europe, US and Japan in terms of volume. Roughly 13% of total pharmaceuticals sales reps worldwide are now working in China and CSD is the only agency in a position to monitor the dynamics of this leading emerging market. We have been auditing SFE and delivering promotion analytics on China since 2004 so we can bring a wealth of experience and

insight to the industry”, commented Christopher Wooden, Vice President for Promotional audits at CSD.

Industry sales force size and rep call volumes are up 13% over the same period in 2009 and this is in line with expectations given double digit sales growth and the importance the industry is placing on a market it considers the key to future profits.

Among leading promoted drug classes, anti-infectives, hypertension and diabetes represent over 25% of total promotional spending in China. CSD audits and projects promotional spending on sales force, meetings & events, samples, clinical trials, advertising and mailing. In the 12 months to September 2010, there have been heavy sales and marketing investments in the above mentioned drug classes.

“The most successful companies in China will be those that adapt the sales and marketing expertise built up in the west over many years to this market. Getting the fundamentals right now is crucial. Companies that invest too little will fall behind but there is a real potential for overinvestment as well. Data driven decisions will be a key to finding the right balance” observes Delphine Perridy, Managing Director of CSD China.

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### **Nielsen Appoints Grace Liu to lead Consumer Research in Singapore**

The Nielsen Company has appointed Dr. Grace Liu as Head of Consumer Research for Singapore, effective December 1, 2010. She succeeds Joan Koh, who has assumed the role of Managing Director for Nielsen Singapore.

In her new role, Grace will assume leadership of Singapore’s Consumer Research function, becoming a member of the Singapore Executive Committee. She jointly reports to Joan Koh and Karthik Rao, Managing Director, Consumer Research & BASES, Asia Pacific, Middle East and Africa, India and Greater China.

Grace joined Nielsen in September 2009 as Associate Director where she held responsibility for championing the Financial Services Industry strategy in Singapore and Southeast Asia region. She played a vital role in leading efforts to deepen client relationships and to drive value for their businesses.

Prior to joining Nielsen, Grace was with The Asian Banker where she led the customized research division, bringing a wealth of experience in servicing the C-suite of major banks in the region, regulators as well as listed multinationals in the technology and services sector. Grace holds a PhD in Economics from Imperial College London.

-END-