

# PASSION FOR THE NEXT

## Market Research Market アジアのリサーチ市場(いちば)



*Discussion Summary & Overview Presentations, 2010/11/25*



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## ***Discussion Summary from China (CMRA) : 1***

### **➤ Overall methodologies**

- If interviewing generic population representatively, CATI will be recommended. CATI questionnaire is usually better no longer than 20 minutes.
- For those low incident product/brand research, pre- recruited and CLT is applied. CAPI is very commonly used in CLT.

### **➤ About Online**

- Now online data collection is popular for kinds of special segments research, such as baby's mom, IT managers, business elite who access internet very often.
- The client is starting to try more types of research. We can predict much more online application in the next few years.

### **➤ About physician and patient interview**

- A very good sampling database exists to do physician sampling design, due to the organized hospital management.





## ***Discussion Summary from China (CMRA) : 2***

- **Doing research in Beijing, Shanghai and Guangzhou**
  - As the first tier cities, Beijing, Shanghai and Guangzhou are always selected to collect consumer's insight. At the analysis stage, if the sample is enough, we will do city comparison due to the significant difference consumer's living habit and personality. If sampling more than those three cities, we always group those three cities as the tier one city result.
  
- **Statistics is reliable for sampling design reference**
  - Some people say the statistical data from the government is not so accurate. But, when doing sampling design, that data is the only solid for reference, better than none. Further more, country level, province level and city level data is existed.





## ***Discussion Summary from Japan***

- **Japanese Teens: Internal Market**
  - Less powerful, more selective as consumers.
  - Investment for “myself” is important.
  - “Kawaii”(Cute) , “Friendly” and “Relax” are important concepts to approach them.
  
- **Japanese products in Asian Countries: External Market**
  - Which sweets and drinks are popular in each country?
  - How do Asian consumers feel about Japanese products?  
Like? Dislike? Don't Know?







## ***Discussion Summary from Korea***

- **Difference in mind set.**
  - Due to country size, Korean firms have always sought opportunities overseas cf. Japanese companies only looked at Japan.
- **Clients have Different Views on each countries**
  - To see marketing opportunities in each market.
- **Speed**
  - Korean clients are very time-oriented, quick to make decisions based on research result.
- **Growth of Online Method in Korea**
  - Korean clients relay on online research result.
  - Comparison with Japanese MR industry, especially research fee and speed to respond clients.





## ***Discussion Summary of Singapore, Malaysia, and Chinese Taipei***

- **Diversity**
  - Difference of culture among ethnic groups, even language.
  - Divided markets for each ethnic groups.
  - Diversified consumer behavior.
  - Literacy rate is very high even in rural areas.
- **Country Census Singapore versus Malaysia**
- **More segments in Malaysia more FGI groups**
  - Attitude of FGI respondents are very different country to country.





## ***Discussion Summary from Thailand***

### **5 tips to make research successful in Thailand**

➤ **Understand the client business issues**

Be aware of where the job is coming from – local office or HQ in Japan, and talk to the right people.

➤ **Length of interviewing**

Thai questionnaires will be longer than Japanese or English. Not only for language structure, but Thais tend to speak slower.

Please assume 20% longer interview time.

For F2F, no more than 30 minutes.

For CATI, no more than 20 minutes.

➤ **Experienced team**

It's a must anywhere isn't it?

➤ **Good sampling plan**

Since Thai families are big and stay in same areas, considerations on how to select the participant

> Focus on purchasers and decision-makers.

➤ **Good quality control procedures**

Fieldwork control > % of quality control in Thailand is already high

DP control > Japanese clients prefer for Double Punching.



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# AUSTRALIA

## KEY NATIONAL INDICATORS

GDP 2009	AUD 1,120,000 million +1.2% JPY 88,480,000 million +1.2%
Inflation 2010	3.1%
Unemployment 2010	3%

Source: ABS 2010



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# AUSTRALIA

KEY INDUSTRY FIGURES	2009	
Industry revenue	729	\$million (AUD)
Revenue growth	-9	%
Number of enterprises	294	
Employment	12,300	People

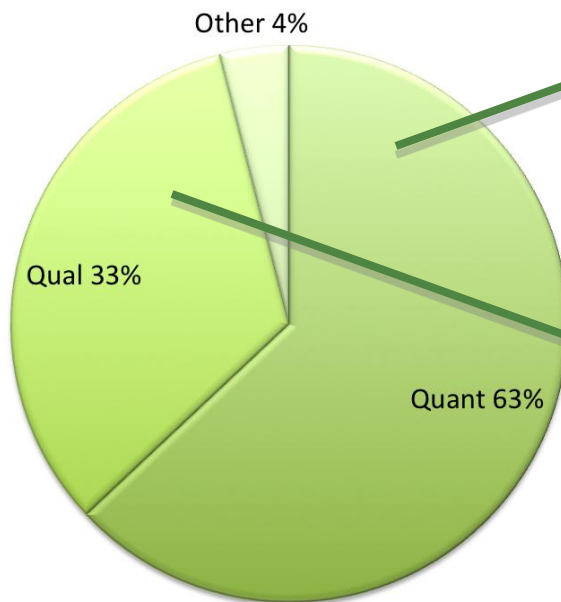
In 2009, the GFC flowed through to reduce market research spending

In 2009, industry revenue fell by 9% to AUD 729 million (JPY 57,591 million)



# AUSTRALIA

## Turnover by research method



Online	32%
Phone	18%
Face to face	7%
Postal	1%
Other	5%

Groups	22%
In-depth interviews	10%
Other	1%

Source: ESOMAR 2009



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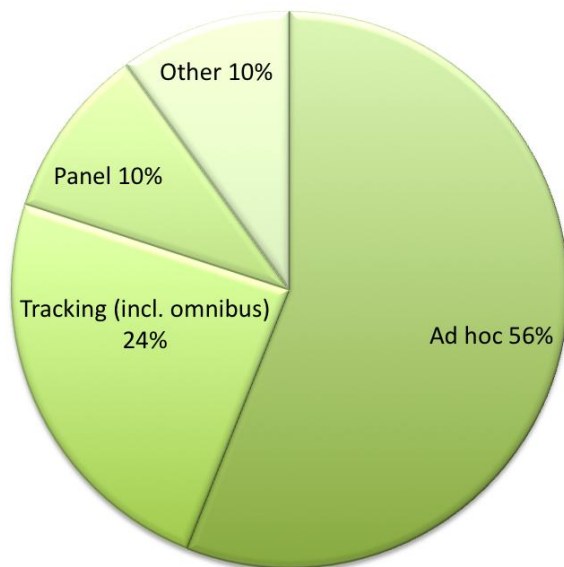
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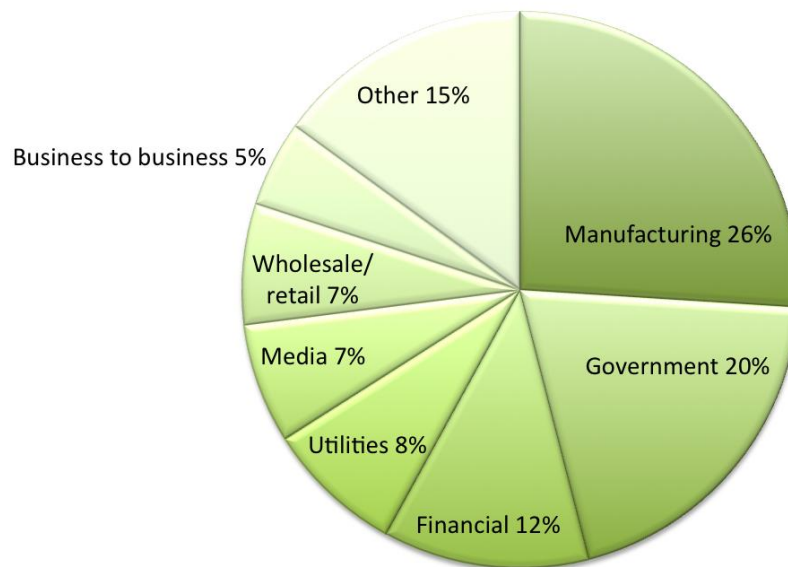


# AUSTRALIA

## Spend by Design



## Spend by industry



Source: ESOMAR 2009



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# AUSTRALIA

## **Recent trends in Australian consumer behaviour**

**Taking comfort in reliable and trusted brands**

**Adopting more convenient shopping methods  
and channels**

**Purchasing locally grown and manufactured products**

**Adopting sustainable living and conscious  
purchasing practices.**



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# AUSTRALIA

## Prospects for future developments in market research

**The greatest potential is with on-line research**

**Reason:**

**on a weekly basis, Australian consumers spend:**

- 22 hours on the Internet
- 14 hours in front of the television
- 8 hours listening to or downloading music
- 3 hours gaming

Source: A "connected consumer" study by Cisco Australia 2009



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# AUSTRALIA

## Online consumer behaviour

**80% of Australians have internet access (Nielsen) and 80% of Australians shop online**

**Up to 50% of Australians search online prior to purchasing in-store**

**Ranked as the most important pre-purchase information source due to “ease of comparison”**

**Growth linked to technological advancement and smart-phone devices**

Source: Australian Institute of Retail Studies 2010



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# OPPORTUNITIES TO NETWORK IN AUSTRALIA IN 2011

## **AMSRS National Conference 2011**

**Sydney 8-9 September 2011**

## **ASIA PACIFIC 2011**

**ESOMAR World Research Conference  
Melbourne 20-22 March 2011**







# China Market Research Industry Review

## CMRA



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## China's Market Research

	2008	2009	Oct 2010
Inflation rate	5.9%	-0.7%	4.1%
Gross Domestic Product Growth			
Size (BCNY)	31,405	34,051	38,921
Growth rate	9.6%	9.1%	9.8%
Domestic Market Research Growth			
Size (BCNY)	6,141	6,270	6,897
Growth rate	17.5%	8.9%	13.3%
Labor cost evolution	11%	12%	10%
Internet penetration rate	22.6%	28.9%	31.8%
Population (BCNY)	1.32	1.33	1.34





## Market Share by Methodology

	2008	2009	2010
Telephone	16%	16%	16%
Face to Face	64%	61%	62%
Mail	2%	2%	2%
Qualitative	14%	16%	15%
Prof.Service/Consulting	2%	2%	2%
Online	2%	3%	3%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>



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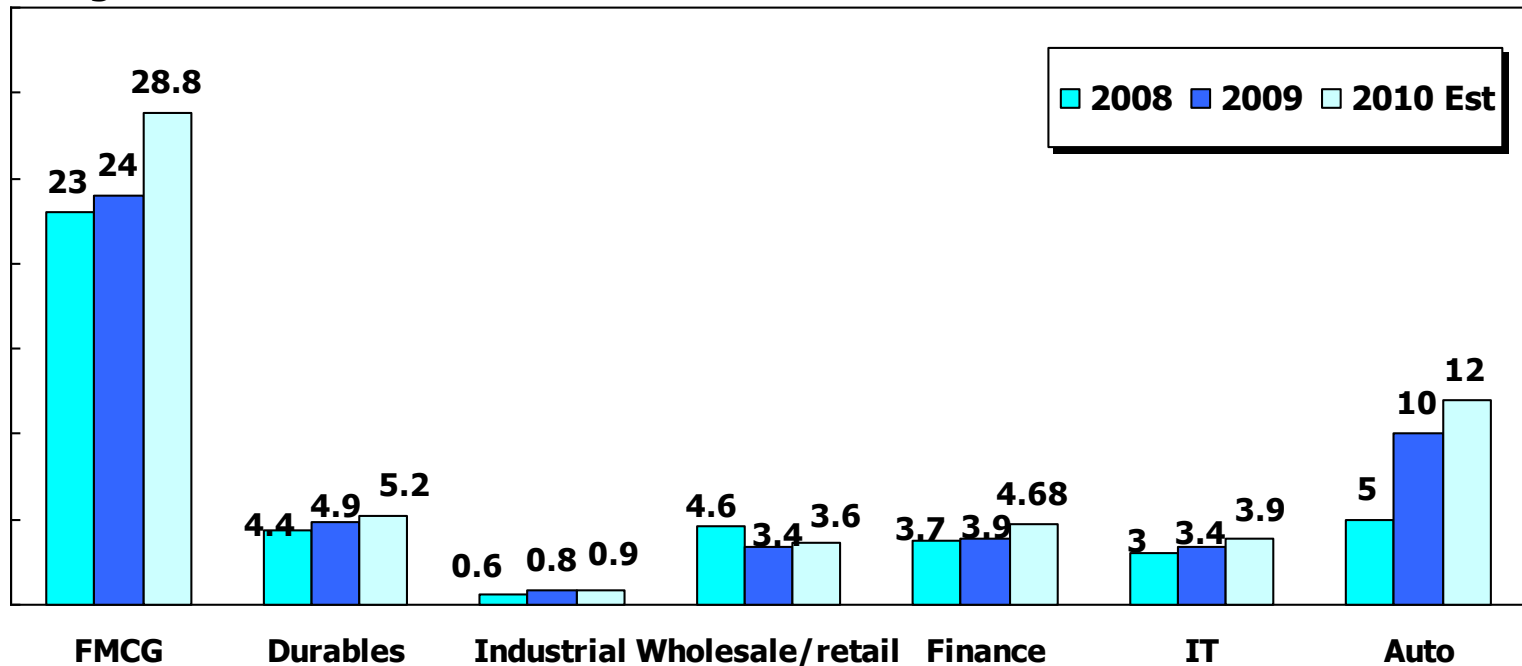


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## Market Share by Client Industry

Percentage %



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## Market Leaders

MCNY		TO Survey Research		TO Panel		TO Total MR	
Name of companies		2009	2010 Est	2009	2010 Est	2009	2010 Est
1	The Nielsen Co.	223	268	284	335	507	603
2	CTR+CSM	60	65	460	480	520	545
3	Ipsos	367	435	-	-	367	435
4	TNS-RI	290	319	-	-	290	319
5	MB ACSR	210	300	-	-	210	300
6	Synovate	240	240	-	-	240	240
7	GFK	60	70	150	165	210	235
8	Sinotrust	160	168	40	50	200	218
9	Horizontal	60	65	30	30	90	95
10	SinoMonitor	20	22	55	55	75	77

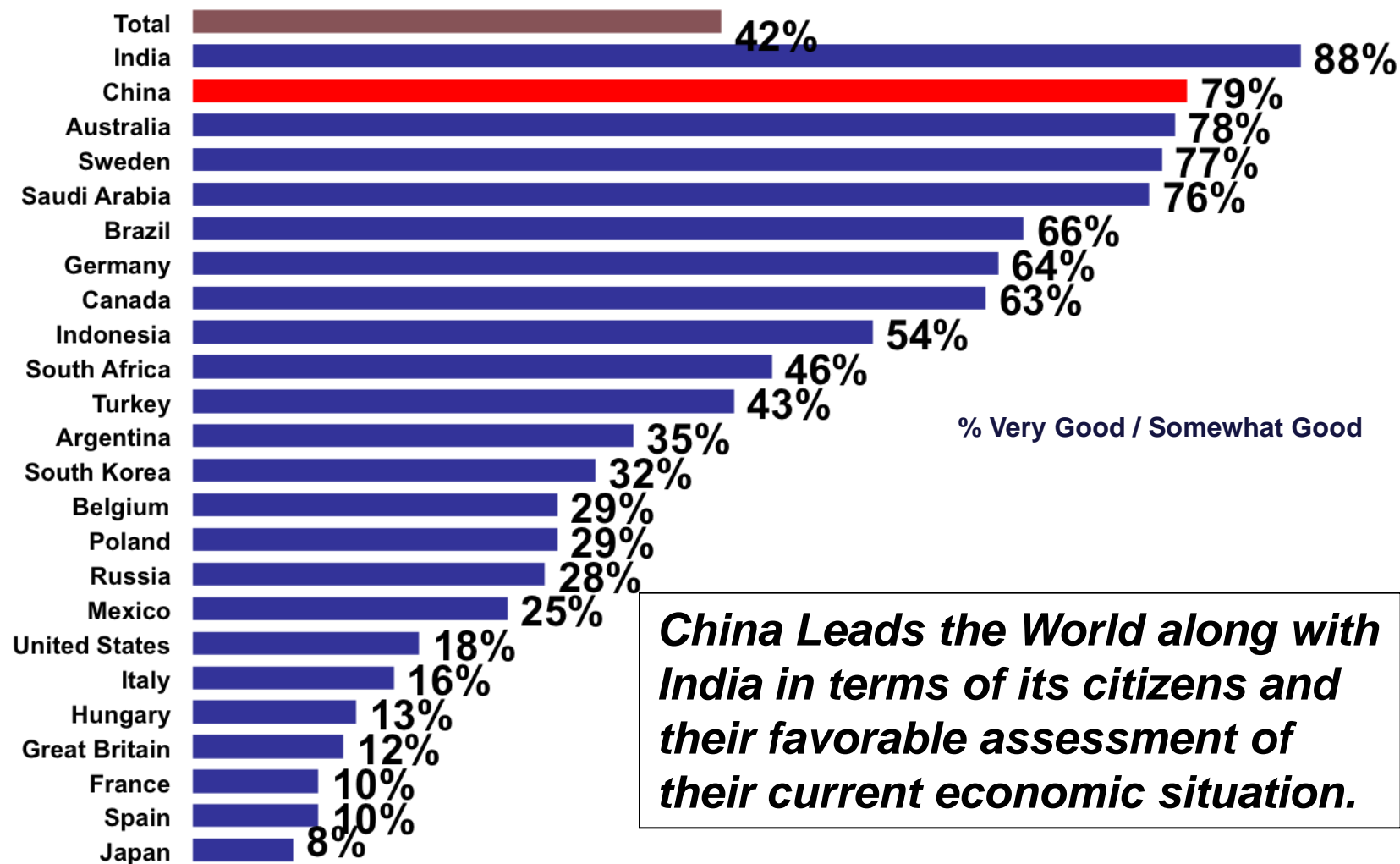


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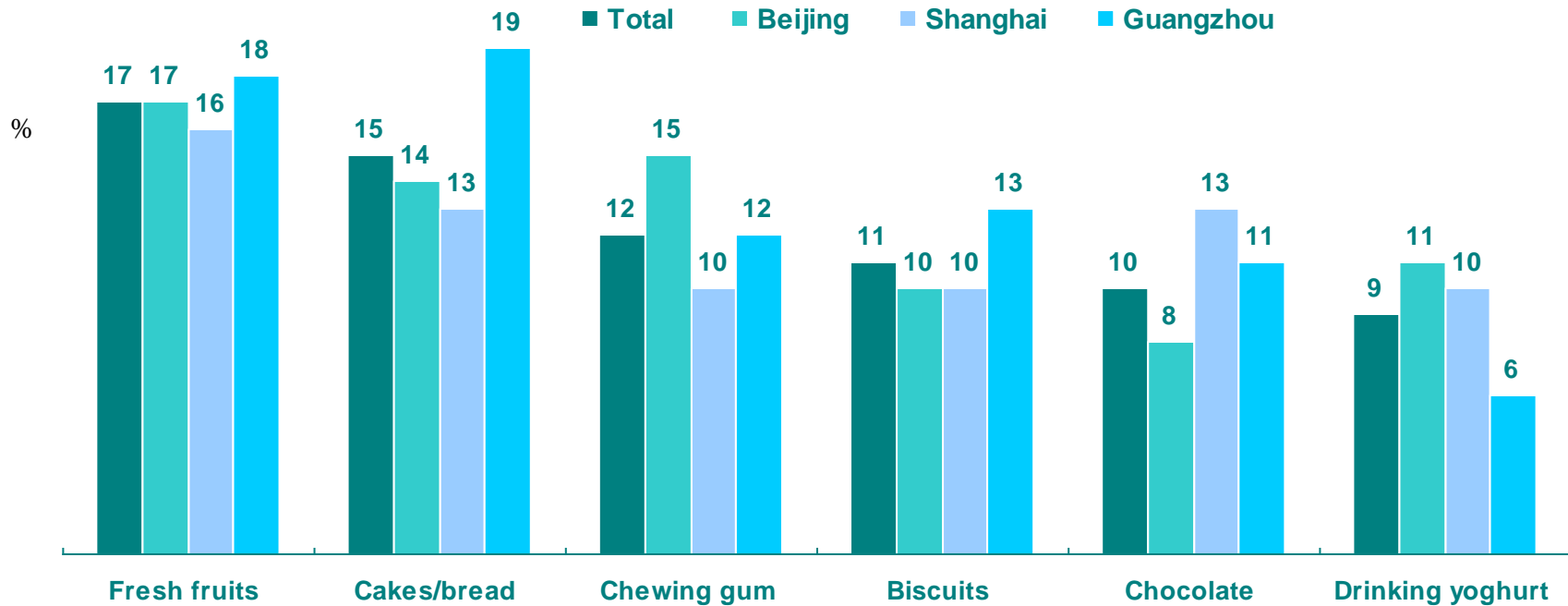


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Now thinking about our economic situation, how would you describe the current economic situation in [insert country]? Is it very good, somewhat good, somewhat bad or very bad?

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## *What Chinese are snacking on*



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**Thank you for your attention!**



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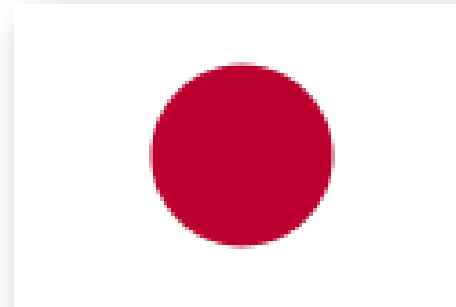


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# Market Research Market Japan 2010



Tatsuzo Uewaki



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# Market Research Market Japan 2010



**Tatsuzo Uewaki**



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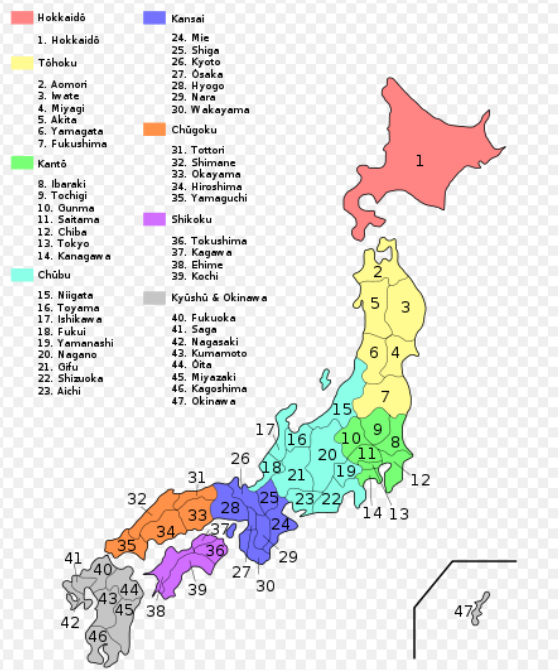
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## Regions and Prefectures of Japan



## Population

**2010 estimate** 127,360,000 (10th)

**2004 census** 127,333,002

**Density** 337.1/km<sup>2</sup> (36th)

(AU 3/km<sup>2</sup>)

## GDP 2010 estimate

**Total** US\$4,276trillion (3rd)

**Per capita** US\$33,478 (23rd)



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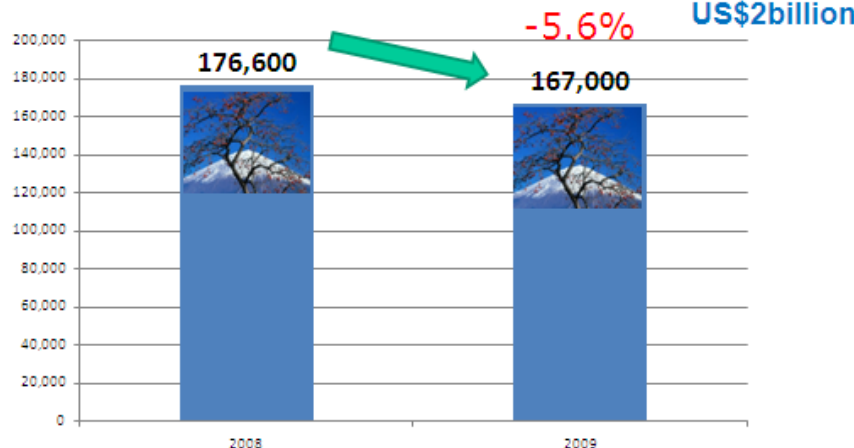
**150 Companies**

**Total turnover = US\$2 billion - 5.6%**

**Employee - 1.3% 2009 vs 2008**

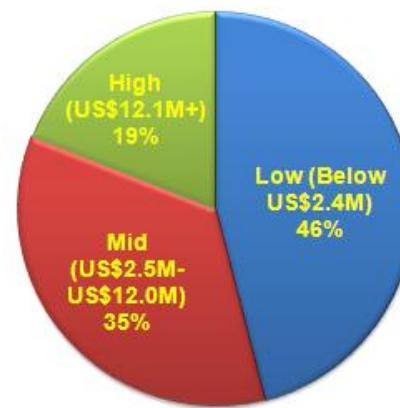
**Average age = 37 (Male = 39, Female = 34)**

Japan Market Research Market Size :  
Million yen



**Small & Mid size companies=81%**

Organization Size by Turnover



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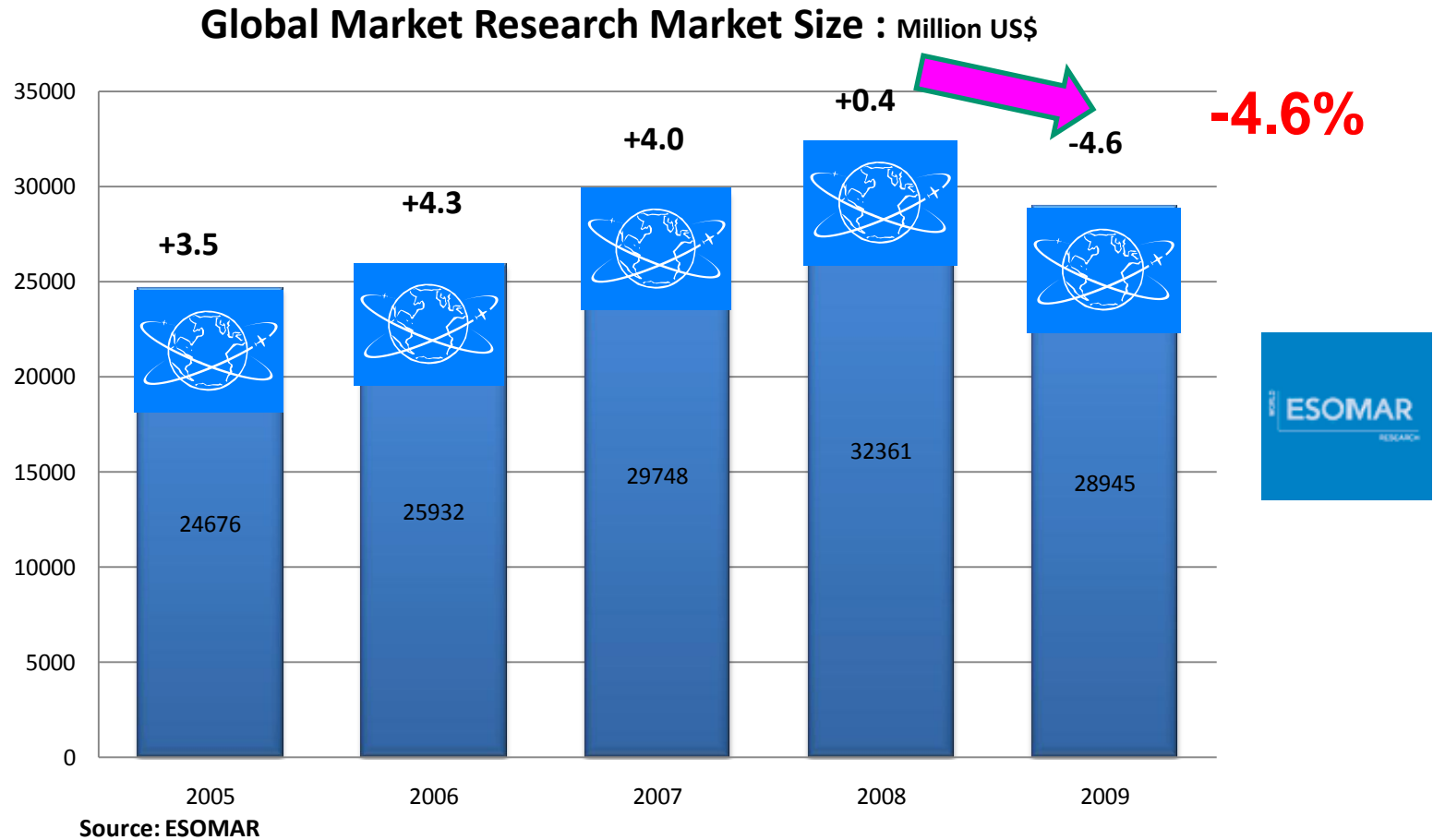


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**Decline the market – Challenge the new Direction!**



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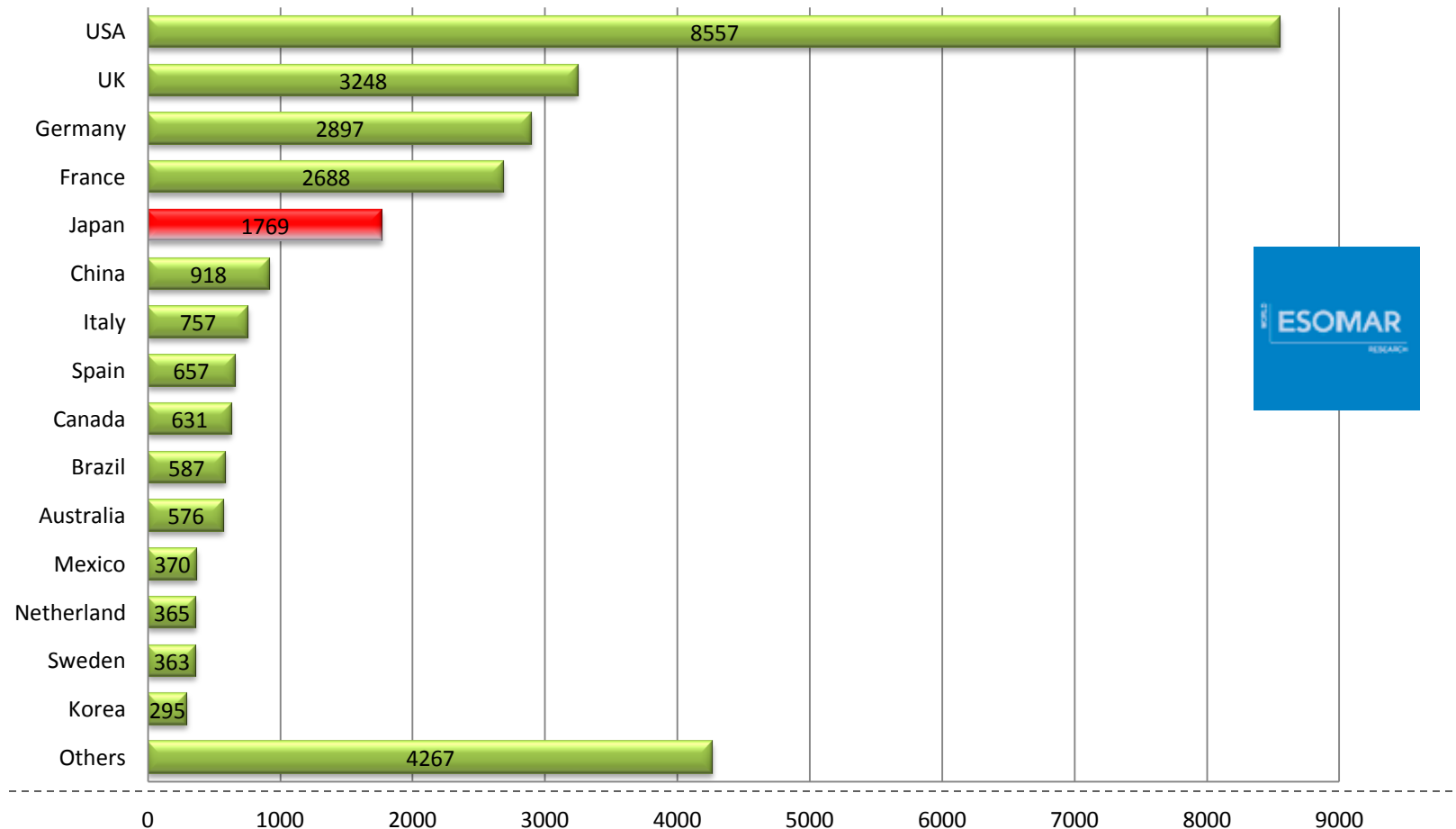


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## Japan is No. 5 Market in the World!

Marketing Research Market Size – Global 2009 : Million US\$



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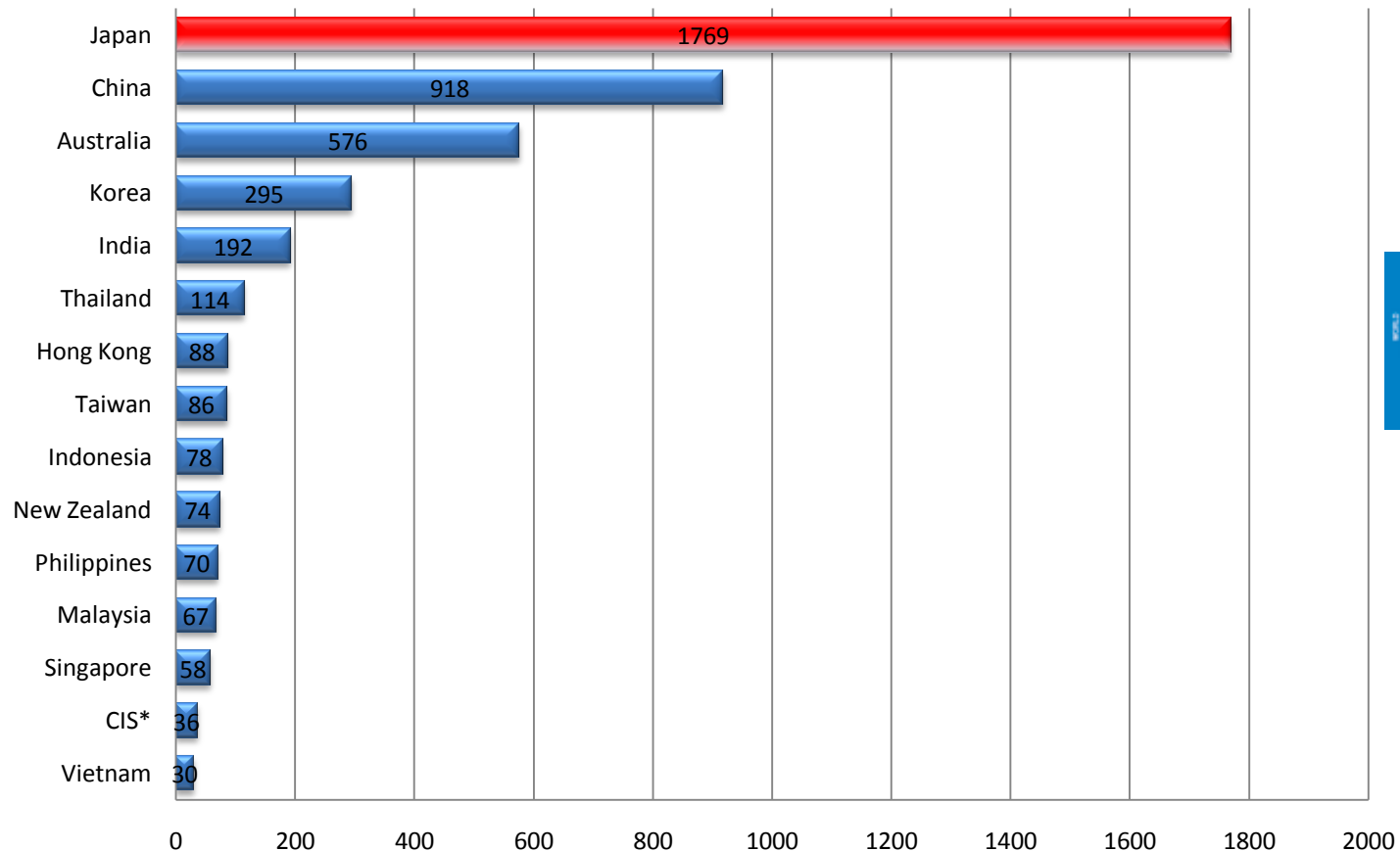
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**Japan is No. 5 Market in the World!**

**But No. 1 in Asia Pacific**

**Marketing Research Market Size - Asia 2009 : Million US\$**

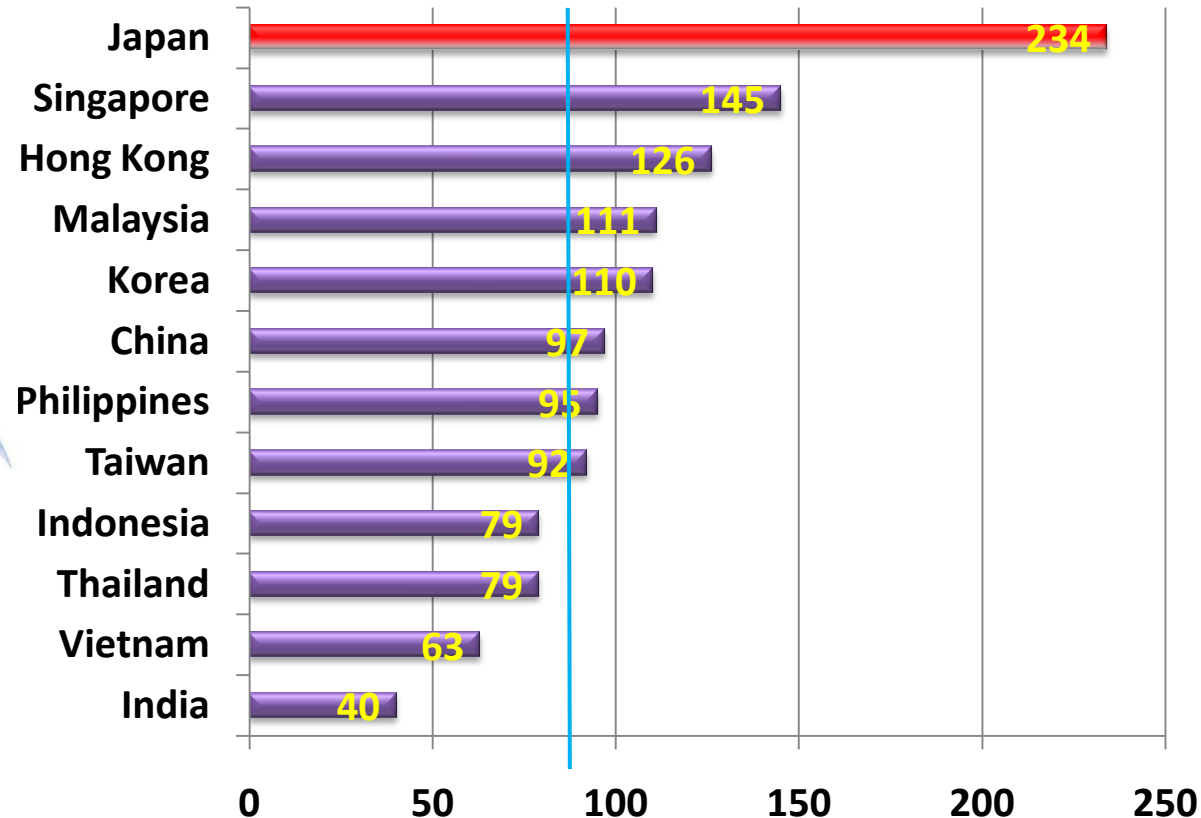


CIS= Commonwealth of Independent States= Armenia, Azerbaijan, Georgia, Kazakhstan & Uzbekistan.



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## Japan is the highest price market in Asia! ESOMAR Price Index 2010 - Asia



Source: ESOMAR



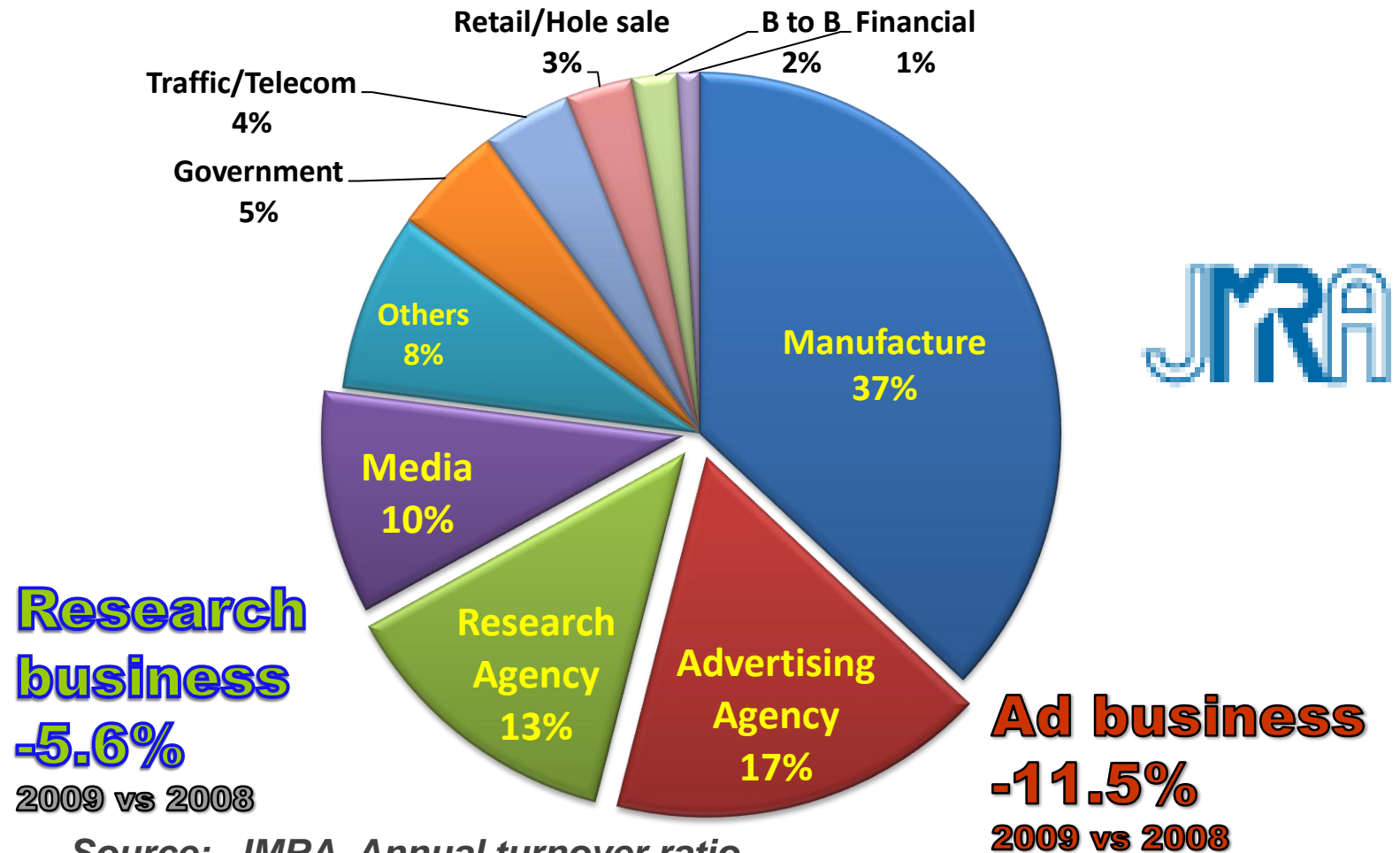
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## Ad / Research Agency & Media represent 40% Business in Japan



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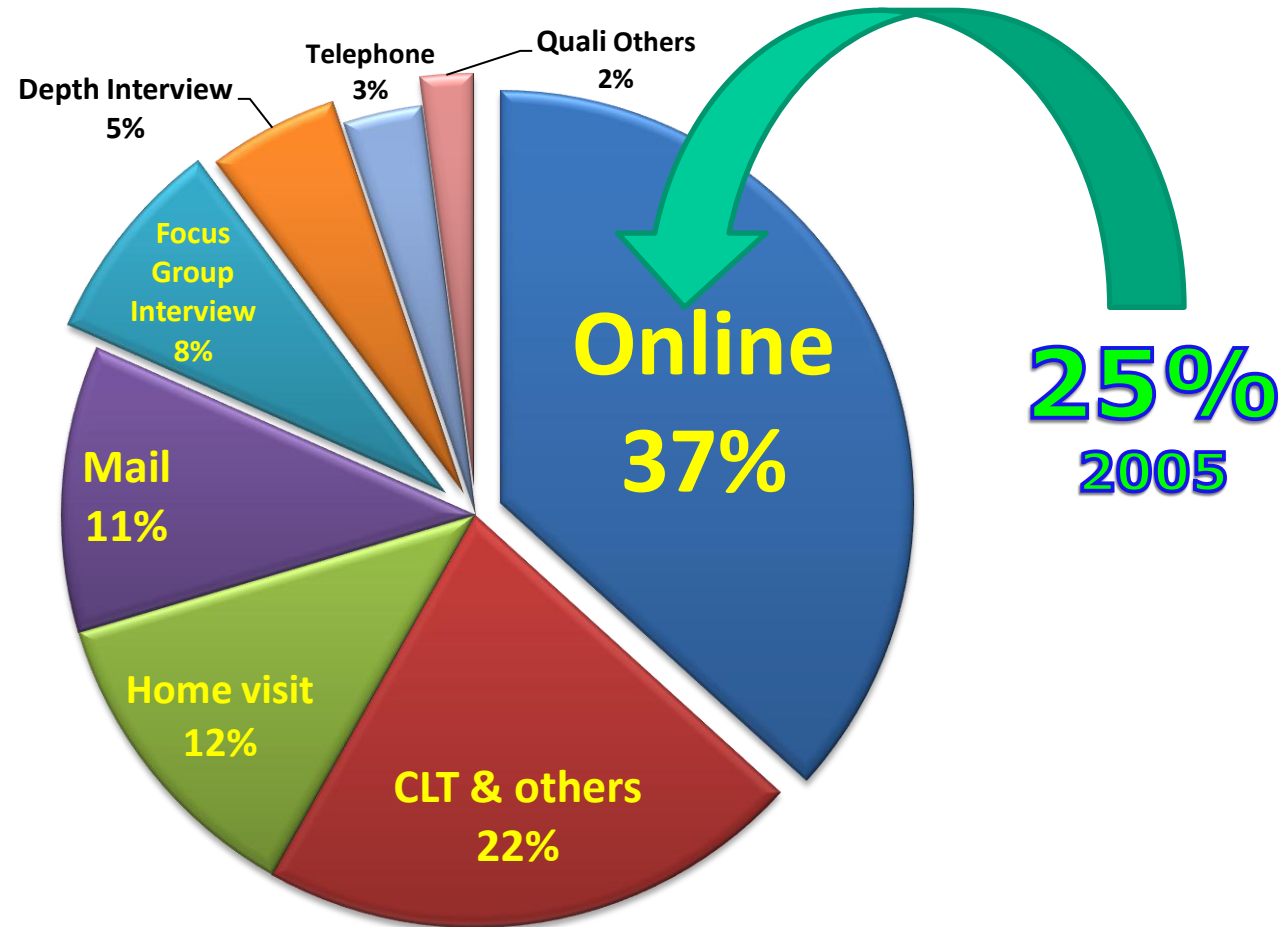
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Online portion is growing and the biggest business in Japan

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Source: JMRA Annual turnover ratio.



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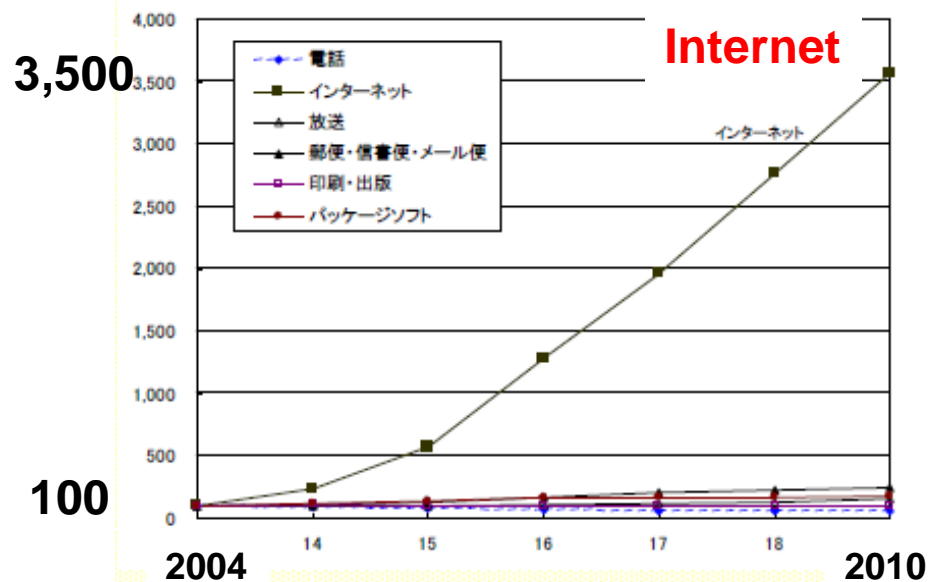
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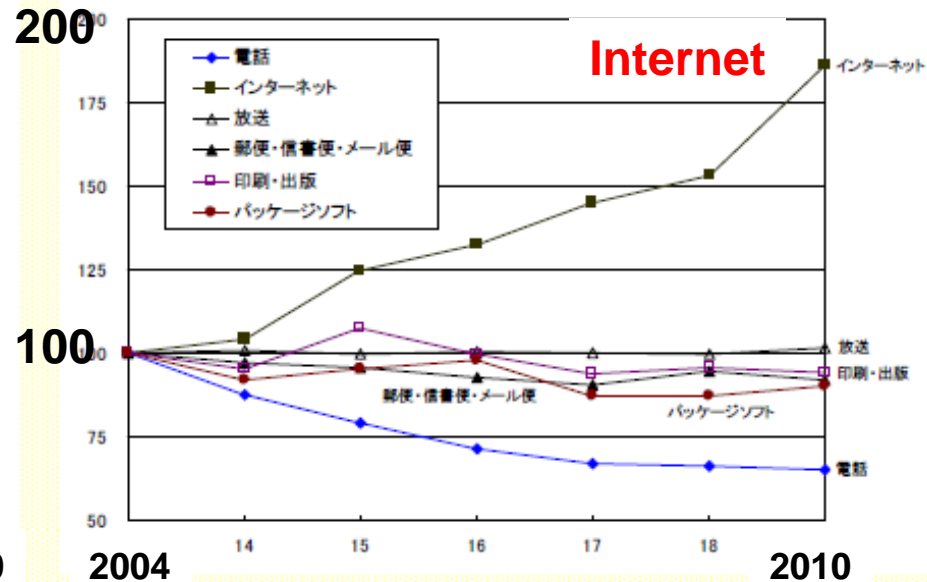
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## Trend of Information Volume – Base 2004=100

### Information Distribution Volume



### Information Consumption Volume



Telephone, Internet, Broadcast, Mail, Publishing/Printing, Package soft

Source: Institute for Information Communication Policy



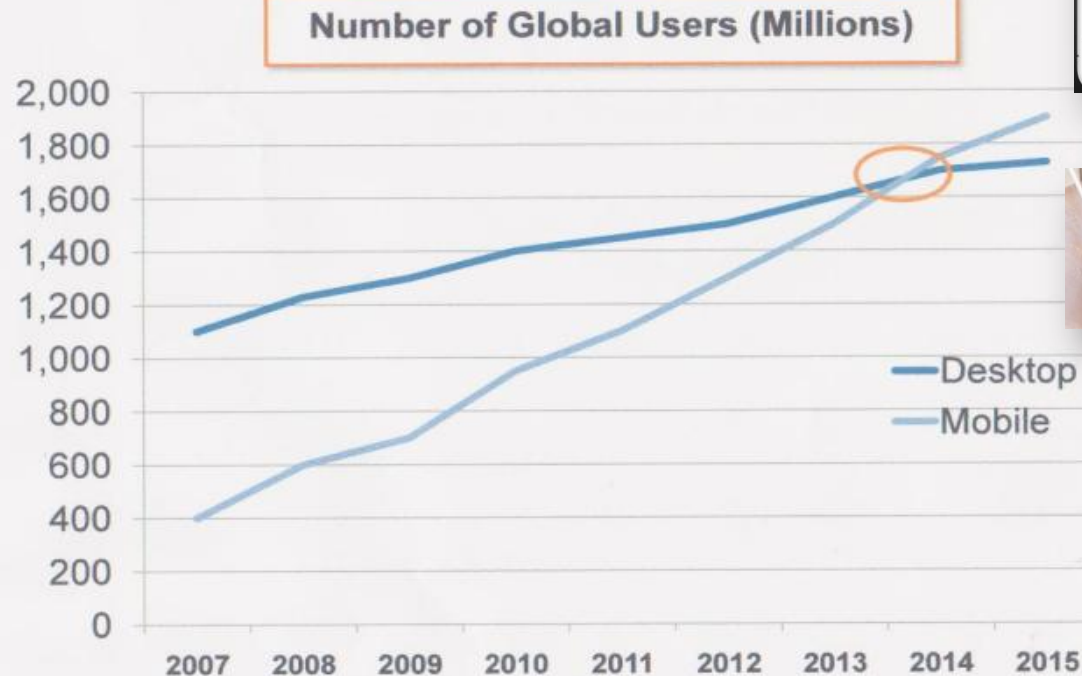
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## Internet Access

Mobile On Track to Eclipse the Desktop



comSCORE

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7

Source: Morgan Stanley Research

Source: com SCORE



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## Management Issues Management Survey 2010

- **Low Price** **70%**
- **Unfavorable Sales** **52%**
- **Excessive Competition** **42%**
- **Lack of middle class staff** **35%**
- **Lack of Research skill** **21%**
- **Lack of Consulting capability** **17%**





## Market Research Market - JAPAN

### ◆ New Definition

- **Change Hi Price Low profit margin!**
- **Creating new clients/markets**

### ◆ New Challenge

- **Globalization**
- **English communication skill**

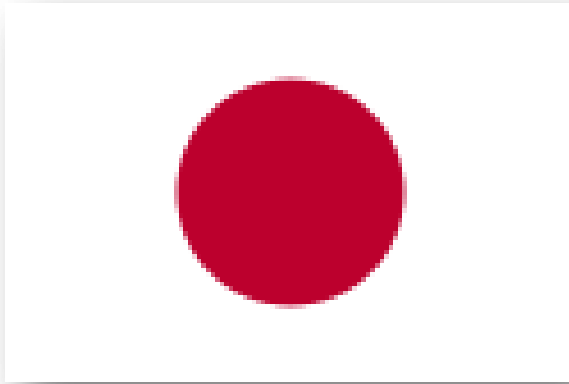
### ◆ New Frontiers

- **Online**
- **Qualitative**





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**See you Xi'an APRC in 2011!**



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Current issues & insights:

**“MORE ONLINE RESEARCH?”**

Kee Hyoung Lee

Dongseo Research Inc.(DSR Group)

Korea Research Association (KORA)



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## Contents :

1. Overview of Korean Research Market
2. Asia Pacific Economic Confidence Study
3. Current issues & insights :  
“More Online Research?”



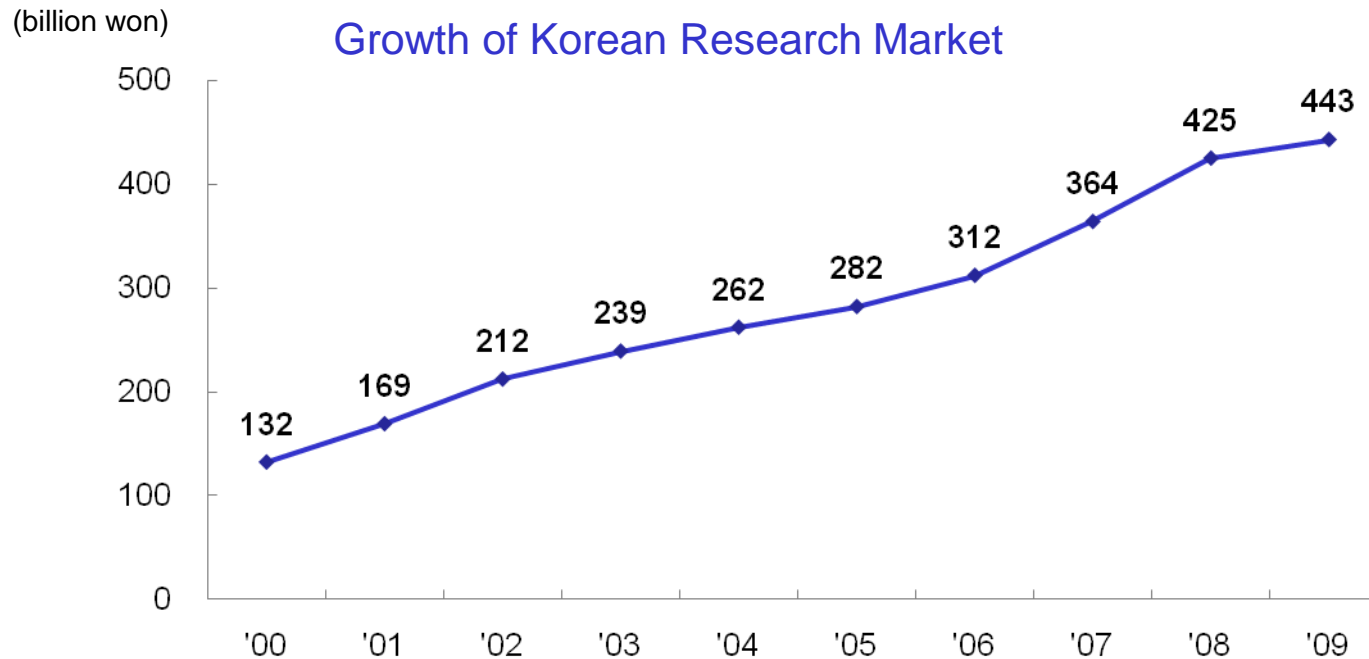
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## Overview of Korean Research Market



(Note : 1billion won  $\doteq$  890,000 USD, 1billion won  $\doteq$  650,000 ¥)



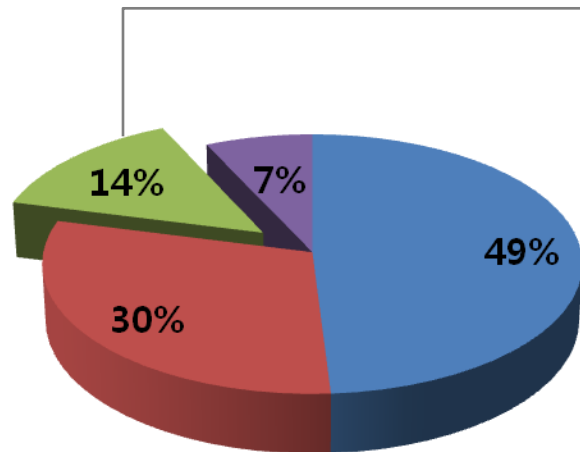
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## Overview of Korean Research Market

### Korean Research Market Share



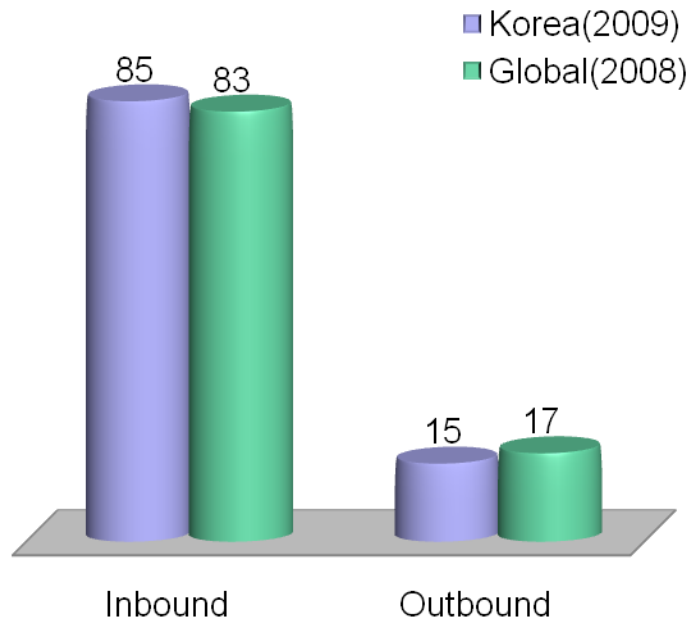
	M/S	Global Rank
Japan	5.1	5
China	2.4	8
Australia	2.2	10
Korea	1.3	15

■ 유럽   
 ■ 북미   
 ■ 아태   
 ■ 기타

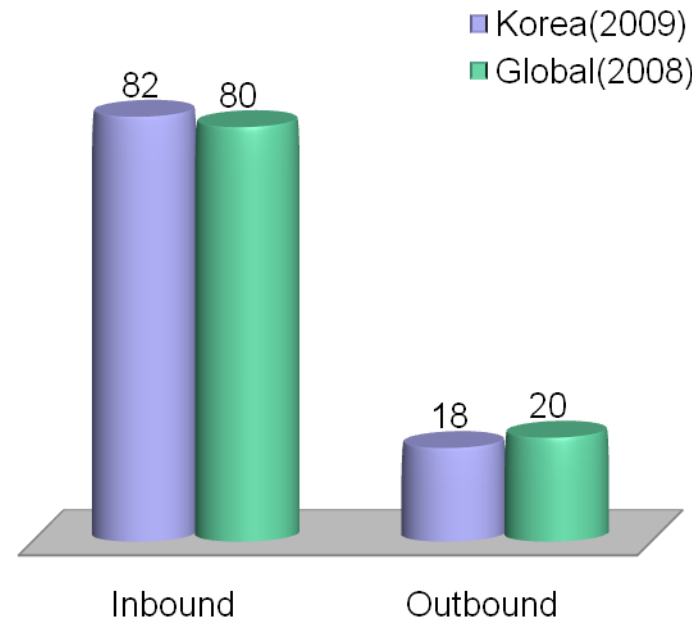


## Overview of Korean Research Market

[Inbound vs. Outbound]



[marketing Research vs. Social Survey]



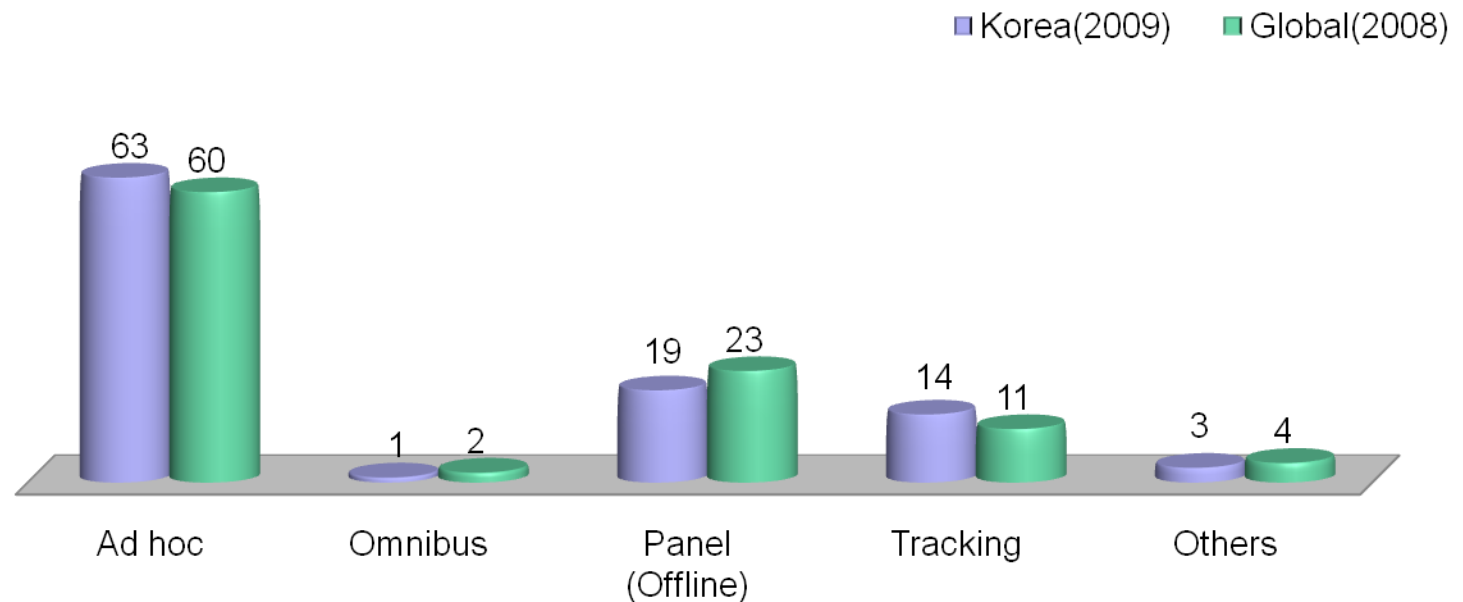
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## Overview of Korean Research Market

### [Quantitative Research]



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## Overview of Korean Research Market

### [Area of Research]

(%)

	Korea (2009)	Global (2008)
<b>Product</b>	45	47
<b>FMCG</b>	19	25
Drink	1	4
Food	4	7
Cosmetics	5	9
Cigarette	1	1
Confectionaries	1	2
Others	7	2
Durable Goods	11	2
Pharmaceuticals	6	11
Motor vehicles	5	4
Others	4	5
<b>Commercial</b>	4	4
<b>Trade</b>	5	4
<b>Financial</b>	7	5
<b>Utilities</b>	8	7
Gas/Water	3	
Communication	4	
Construction/Traffic	1	
<b>Public</b>	18	9
<b>Media/Entertainment</b>	2	14
<b>Advertisement</b>	3	3
<b>Research</b>	4	3
<b>Others</b>	4	4





# Overview of Korean Research Market

## [Methodology]

Global		(%)		
		'00	'05	'08
Quantitative	F2F	40	24	12
	Telephone	29	21	18
	Mail	8	6	4
	On-Line	2	13	21
	Off-Line Traffic			1
	ED/RFID/DB			17
	Other	5	19	7
Qualitative		13	14	14
Other		3	3	6

Korea		(%)		
		'00	'05	'09
Quantitative	F2F	44	37	32
	Telephone	27	19	14
	Mail	1	1	1
	On-Line	1	6	14
	Off-Line Traffic			2
	ED/RFID/DB			9
	Other	7	18	11
Qualitative		17	17	15
Other		3	2	2



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# Asia Pacific Economic Confidence Survey

**Joint study by local research companies in 5 countries: 2009/2010**

**Views on local economic situations and consequences on two aspects :**

Personal financial situation

Role of national and world economic /financial institutions

**Identify:**

Up-to-date measurement of the recession/recovery level

The present and future impact on daily life

People's reaction and attitudes toward the economic crisis/recovery

Perception on "who is to blame"

Evaluation of government's and financial institution's actions

**Comparison & Analysis on differences and similarities among the five countries.**

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## Asia Pacific Economic Confidence Survey

### [Survey Outline]

		Australia	China	Japan	South Korea	Thailand
Fieldwork:		Telephone	Telephone	On-line	Telephone	Telephone
Respondents:		Men & Women aged 20-69				
	2009	554	1,000	1,000	1,000	760
	2010	502	1,000	1,000	1,000	1,025



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## Asia Pacific Economic Confidence Survey

[Perception on the current economic situation]

	Now is a good time to buy the products that I want / need		Struggling to make ends meet		Current economic situation is the worst in lifetime	
	<%Positive – %Negative>		<%Agree – %Disagree>		<%Agree – %Disagree>	
	2009	2010	2009	2010	2009	2010
Australia	-7	+5	-38	-43	+10	-26
China	-7	-4	-17	+3	-30	-32
Japan	-27	-44	+24	+33	+25	+11
South Korea	-53	-72	+83	+84	+58	+17
Thailand	-44	-45	+40	+7	+53	+23



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## Asia Pacific Economic Confidence Survey

[Outlook for future economic situation]

	Personal financial situation in next 6 months		Possibility of losing jobs by family members		National economy	
	<%Better – %Worse>		<%Concerned – %Not concerned>		<%Stronger – %Weaker>	
	2009	2010	2009	2010	2009	2010
Australia	-3	+21	-25	-52	-58	+10
China	-7	+26	-24	-36	+22	+56
Japan	-42	-20	+4	-5	-78	-73
South Korea	-38	-1	-12	-28	-25	+1
Thailand	-40	-1	+21	+2	-69	-56



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## Asia Pacific Economic Confidence Survey

[Who is responsible for the global economic problem?]

	Free Market System works well vs. Need gov't intervention		Government taking sufficient measures		IMF and World Bank taking sufficient measures	
	<%Free Market System – %Gov't intervention>		<%Sufficient – %Not Sufficient>		<%Sufficient – %Not Sufficient>	
	2009	2010	2009	2010	2009	2010
Australia	-14	-26	+33	+14	-12	-10
China	-28	-20	+13	-16	+4	-20
Japan	-17	-15	-93	-94	-85	-81
South Korea	-30	-26	-8	+5	+15	+14
Thailand	-37	-42	-79	-81	-77	-60



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## Current issue & insights : “More Online?”

**National Census 2010: over 40 % by online (0.9% in 2005)**

: (Australia in 2006: 6%, Japan 8.4%)

### **Reasons & Influences:**

- Internet accessibility & availability (over 80%)
- Changed Lifestyle & family units
- Means of communication & research methodology
- Reward for respondents (financial benefits & others)

### **More Online ?:**

- Economical & accessible
- How to attract more participants and responses
- How to improve (screen) the quality of information



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# PASSION FOR THE NEXT



## The Research Business in Singapore

Dr Neil Gains  
Tapestry Works, Singapore

**25 November 2010**



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## History & Development - Singapore

1990-95

1996-2000

2001-2005

2006-2010

2011-2015

Growth of research business with **rise of Asian Tiger Economies.**

Singapore gains status as **regional research hub** for Asia.

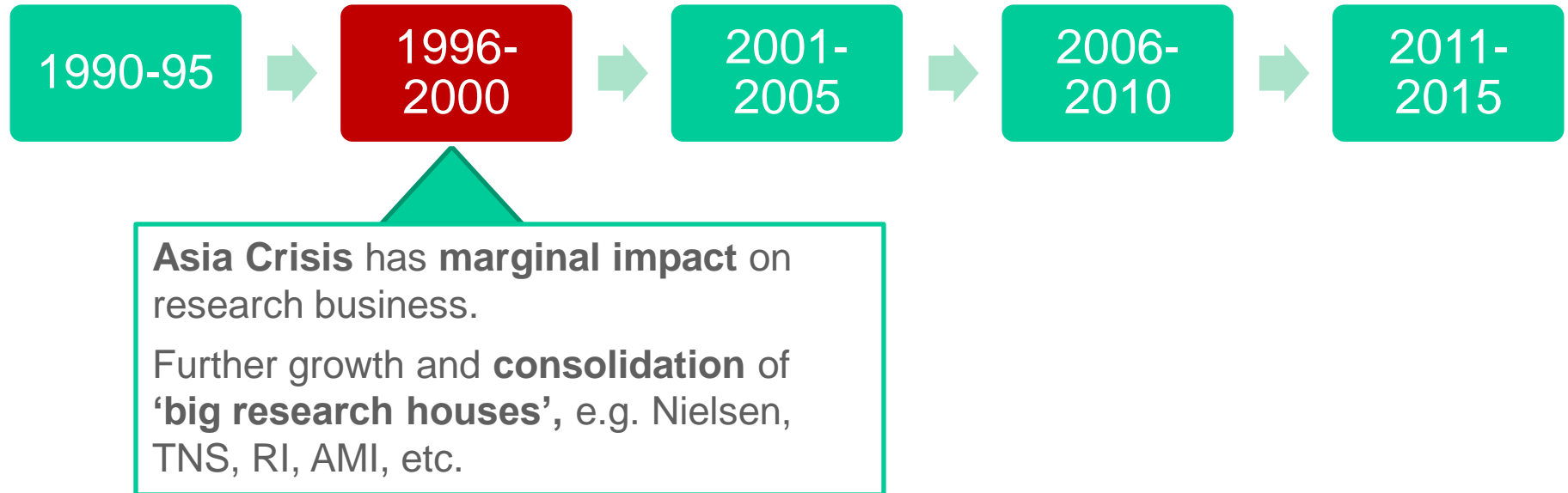


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## History & Development - Singapore

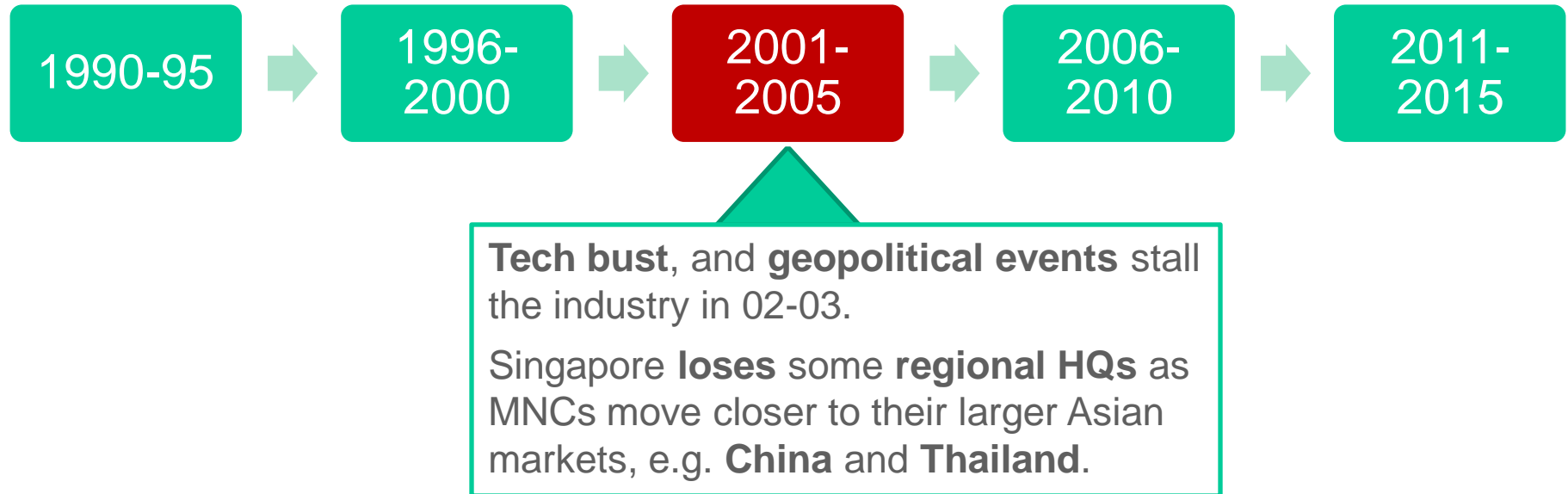


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## History & Development - Singapore



## History & Development - Singapore



06-08 sees **large boom** in research industry (c. **30% growth**) with many **start ups** and **new entrants**.

09 sees GDP decline of 8% and the **worst crash** (c. **15% decline, widespread redundancies**), leaving MR industry in state of **oversupply**.

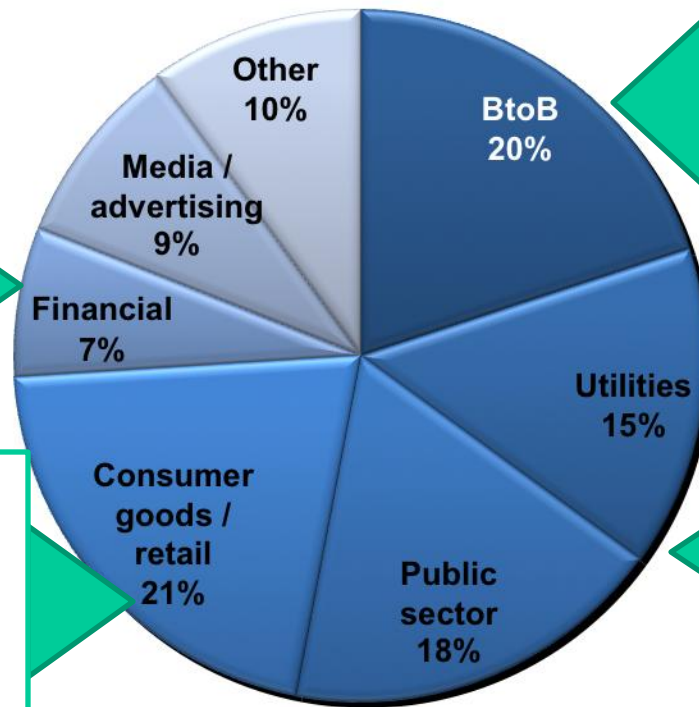
**Some** recovery in 2010, and **Singapore government** target growth of **regional hub**.





# PASSION FOR THE NEXT

**Market size was USD \$ 58 M in 2009**



**High proportion of B2B – hub for Canon, HP and other players**

**Global research HQ for Standard Chartered Bank**

**Small domestic market hides a bigger regional role. Unilever, P&G and others have HQs in Singapore**

**Government and privatized utilities big spenders on research**



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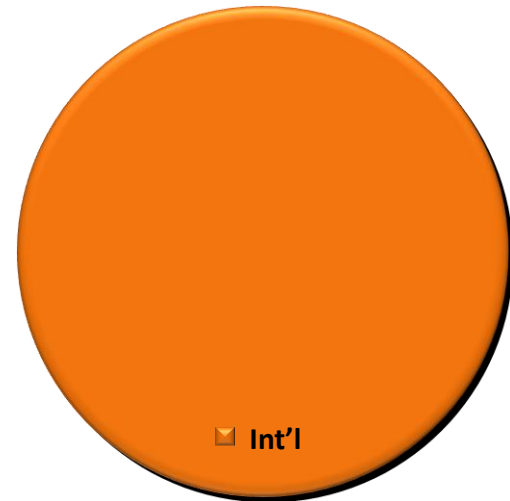
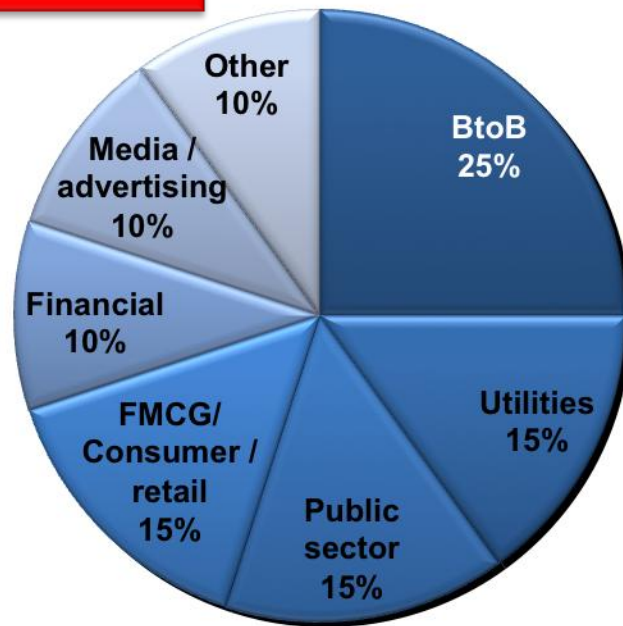
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## International research another ~ \$38M

(Total market size ~ USD 100 million)

A large market of  
international research



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## Future - Singapore



Continued growth in **mobile and on-line** methods and increasing use of **behavioural data** and **analytics**.

Fragmentation and specialisation: growth of new **boutique research consultancies**.

Continued growth of Singapore as an **Asian hub**.



# PASSION FOR THE NEXT



## Thank you!

Dr Neil Gains  
Tapestry Works, Singapore

**25 November 2010**



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**PASSION FOR THE NEXT**

# market research society SINGAPORE



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# PASSION FOR THE NEXT

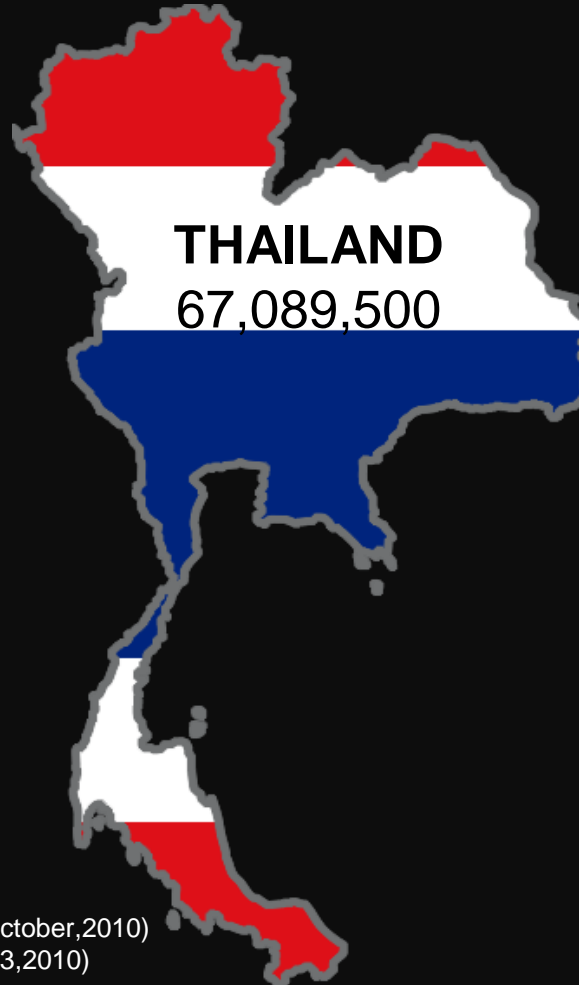
## Population :

67,089,500 (July 2010 est.)

Gender	Census (%)
--------	------------

Male	49.46
------	-------

Female	50.54
--------	-------



Sources: National Statistics Office Thailand (October,2010)  
CIA The World Factbook (November 3,2010)



# PASSION FOR THE NEXT

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## Age:

0-14 years

20.8%

15-64 years

70.5%

65 years and  
over

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Thai

75.00

Chinese

14.00

Other

11.00



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## Ethnicity:

Thai 75.00

Chinese 14.00

Other 11.00

**Literacy (15  
yrs+)**

**92.6**



Sources: National Statistics Office Thailand (October,2010)

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Economic Forecast Year 2010:	
(% )	Projection
GDP	7.0-7.5
Export of Goods	25.7
Inflation	3.5

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\*Bangkok Post (November 11, 2010)

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Communications 2010*:	
Telephones - main lines in use:	7.024 million
Telephones - mobile cellular:	69 million
Internet hosts:	1.335 million
Internet users:	18 million
High Speed Internet users:	2 million
Social Network Facebook users:	6 million
Grow up-	15% per month

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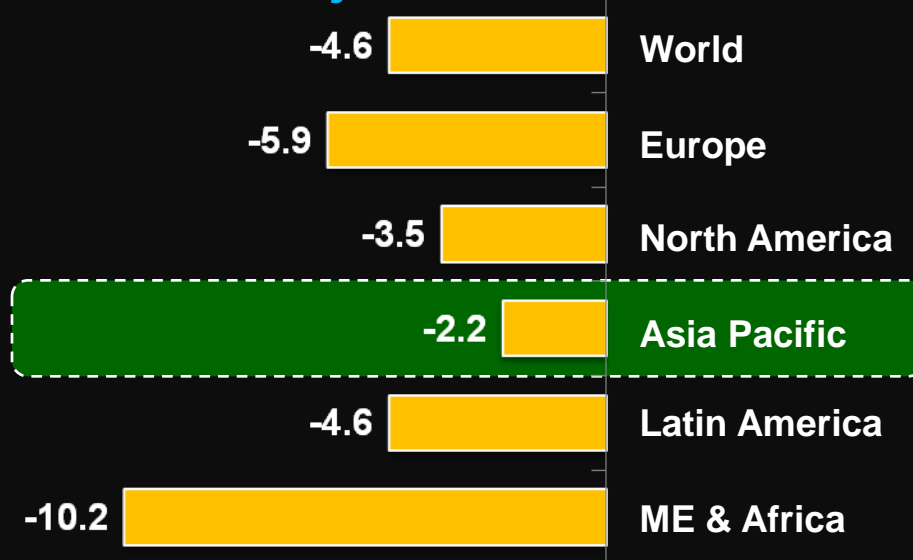
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## GLOBAL AND REGIONAL GROWTH RATES

### Growth rate adjusted for inflation

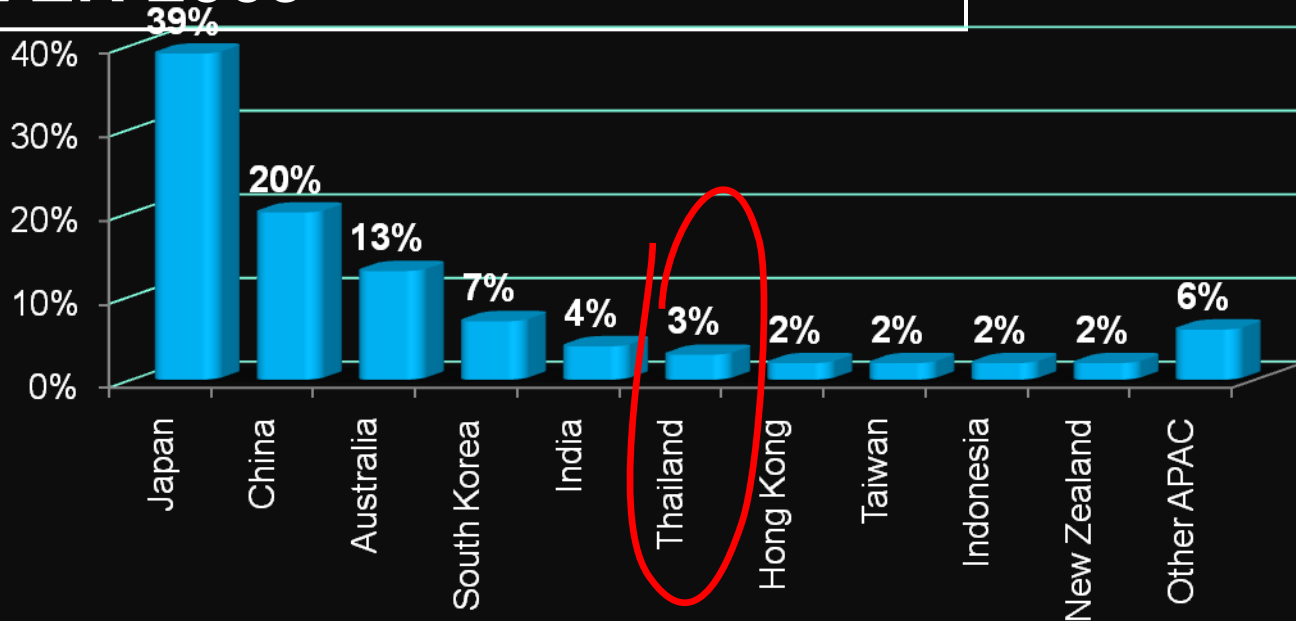


Exchange rate fluctuations eliminated. IMF inflation rates used to determine net growth.

- A decline of 4.6% is the 1<sup>st</sup> decline in worldwide research turnover since ESOMAR began measuring the industry in 1988
- APAC experienced the softest declines globally

Sources: ESOMAR Global Market Research 2010

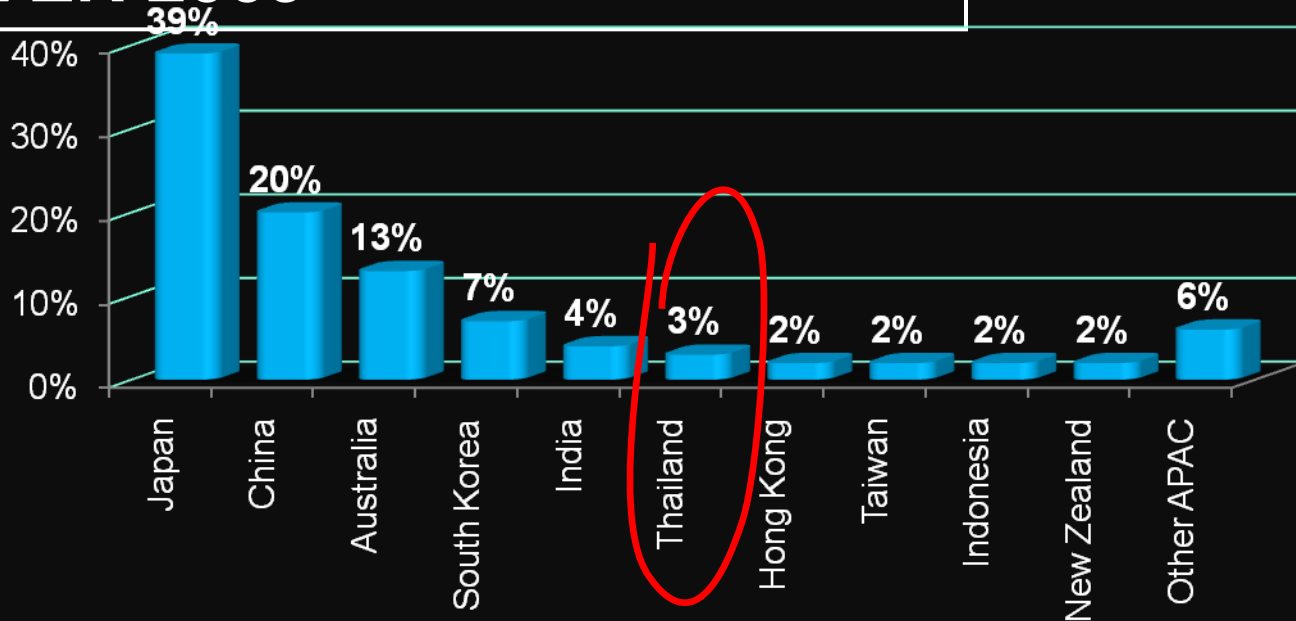
## BREAKDOWN OF APAC TURNOVER 2009



- Japan is by far the largest market in the APAC region, however its prominence is falling as emerging economies grow at a fast rate

Sources: ESOMAR Global Market Research 2010

## BREAKDOWN OF APAC TURNOVER 2009



- With turnover estimated at \$114m or 3.9bn Baht Thailand is the 6<sup>th</sup> largest market in APAC

Sources: ESOMAR Global Market Research 2010



## ASIA PACIFIC 2009 AND GROWTH RATES

	Turnover (US\$m)	Net growth (%)	
Asia Pacific	2009	2008/09	Growth over 5%
Australia	576	-10.6	
Bangladesh	8	-4.5	
Cambodia	3	3.7	
China	918	2.8	
Commonwealth of Independent States	36	3.1	
Hong Kong	88	-10.4	
India	192	-6.0	
Indonesia	78	15.5	15.5
Japan	1,769	-4.0	
Laos	1	-4.8	
Malaysia	67	-0.6	
Myanmar	2	-7.2	
New Zealand	74	-19.9	
Pakistan	12	-10.5	
Philippines	70	4.3	
Singapore	58	-14.2	
South Korea	295	16.6	16.6
Sri Lanka	5	3.8	
Taiwan	86	7.2	7.2
Thailand	114	6.9	6.9
Vietnam	30	0.1	
<b>Total</b>	<b>4,480</b>	<b>-2.2</b>	



**Established on  
Novembers 3, 1999**

**Revenue in 2009 = \$114m**

**33 companies participating  
TMRS =87% of total revenue**

## Top 15 Market Research Companies

- 1 The Nielsen Company (Thailand) Ltd.
- 2 TNS Research International (Thailand) Ltd.
- 3 Synovate Ltd.
- 4 Millward Brown Firefly Co., Ltd.
- 5 Ipsos (Thailand) Limited
- 6 Advanced Research Group Co., Ltd.
- 7 Research Dynamics Co., Ltd.
- 8 MOCAP Limited
- 9 Gallup Co., Ltd.
- 10 Market Support Co., Ltd.
- 11 Acorn Marketing & Research Consultants Co., Ltd.
- 12 Infosearch Ltd.
- 13 CSN & Associates Co., Ltd.
- 14 Vitamins Consulting & Research Ltd.
- 15 Custom Asia Co., Ltd.

Sources: ESOMAR Global Market Research 2010

## MARKET RESEARCH REPORT

**Face-to-face and telephone are popular**

**Online research has just born and ready to grow up in 2012 when the G3 system is completely used in nationwide within the year of 2011.**

Sources: ESOMAR Global Market Research 2010

