



Comparison of Online Research Environments among the APRC 5-countries

- Desk Research -

Working Group-2 / JMRA Research Technology Committee



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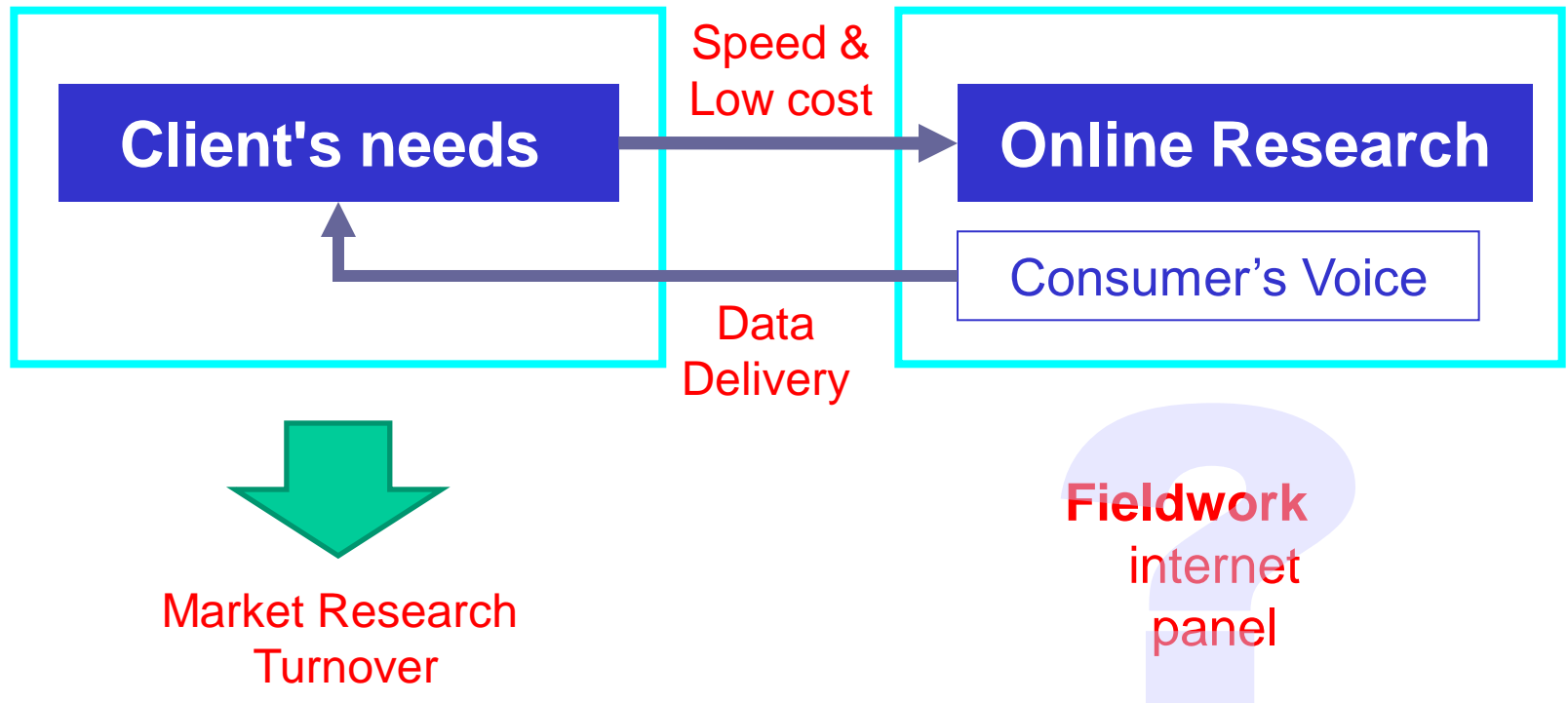
Presentation

- Objectives of this Initiative
- Outline of the Desk Research
- Findings on:
 - The Marketing Research Market in 2004 to 2008
 - The situation of the Online research in the 5 countries
 - The current status of the Online research
- Issues for the Future

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Objectives of this Initiative

- To share online research environments of the APRC 5-countries.



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Outline of the Desk Research

■ Process:

JMRA developed a list of research items, and the research associations of the other four countries (Australia, China, Korea and Thailand) conducted desk research to collect the information respectively.

■ Period:

End of April 2010 – September 2010

■ Main research items

- The market size of the Marketing Research
- The environment and situations of the Online research

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The Market Size of The Marketing Research Market in 2004 to 2008



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Summary

Asia Pacific Region in the World

- The third biggest market size in the world with continuous growth

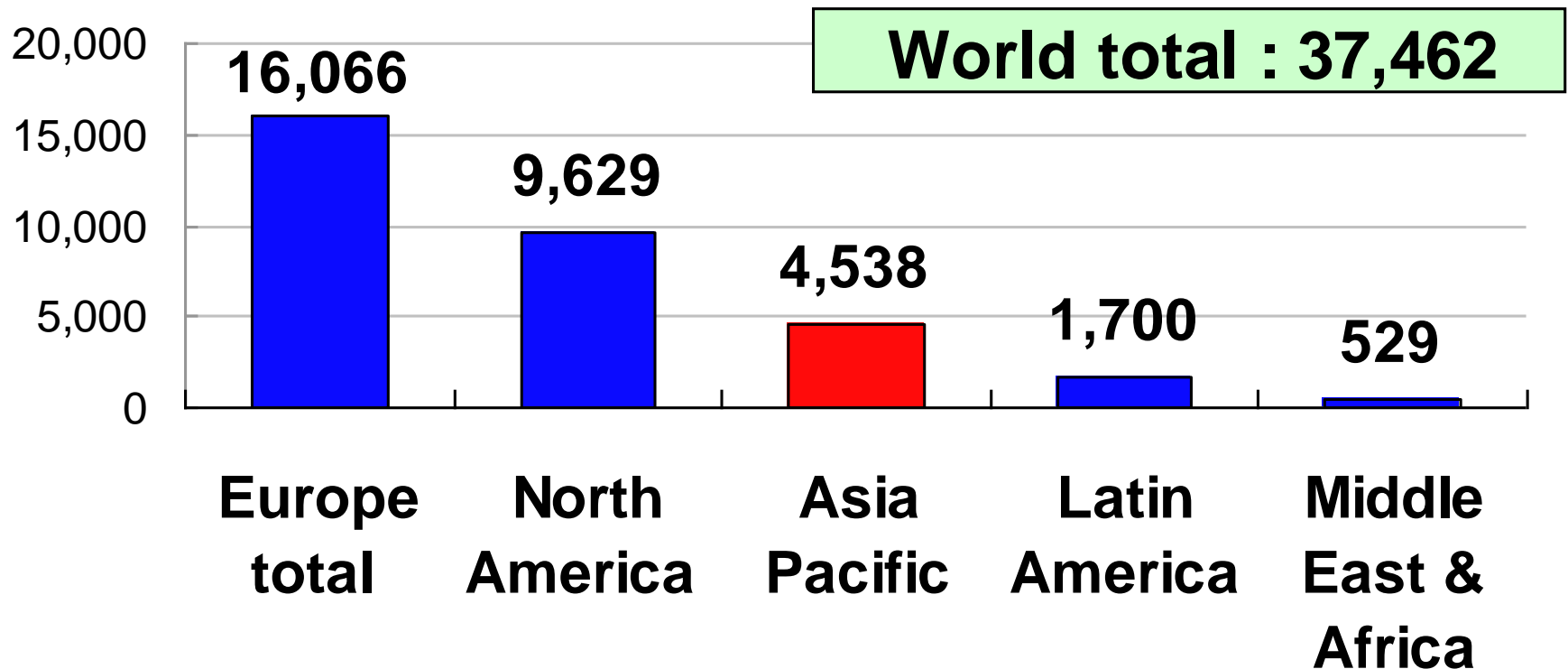
APRC 5 Countries

- The market sizes of Australia, China, Korea and Thailand have been on the continuous growth.
- That of Japan has been on the low growth trend.



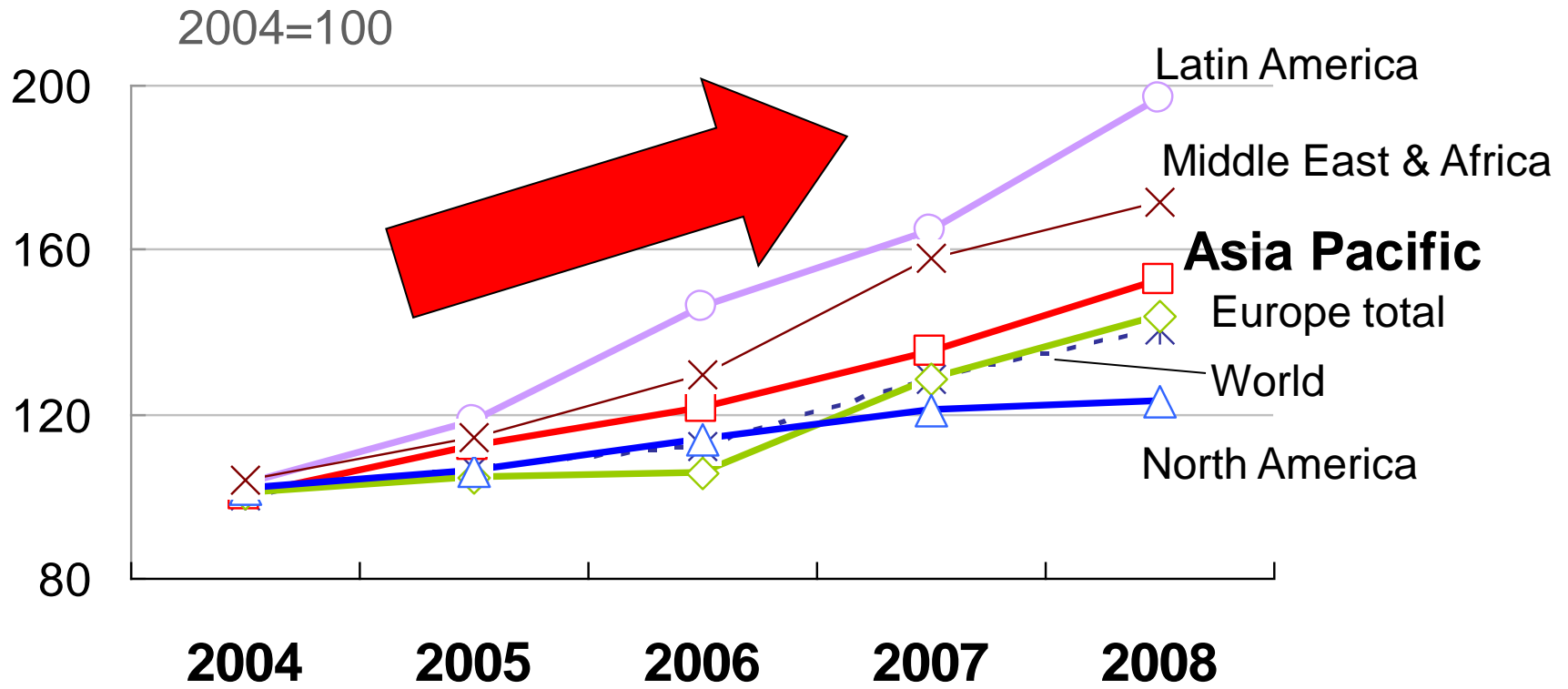
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Market research turnover 2008 (US\$m) (By region)



Source: ESOMAR, 2009

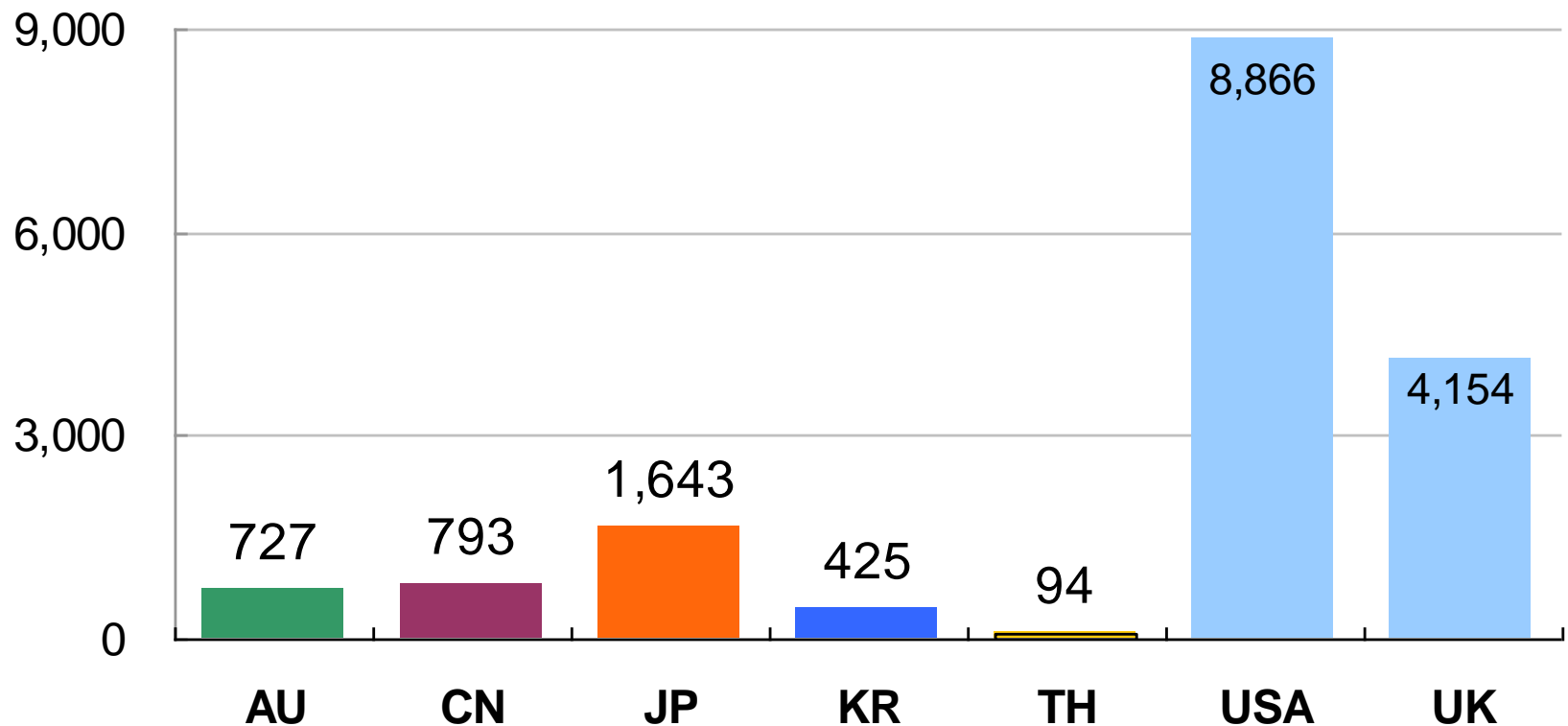
Growth rate of the Market research turnover (By region)



Source: Base on ESOMAR2009

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Market research turnover 2008 (US\$m) (APRC 5 countries and other major countries)



Source: ESOMAR, 2009

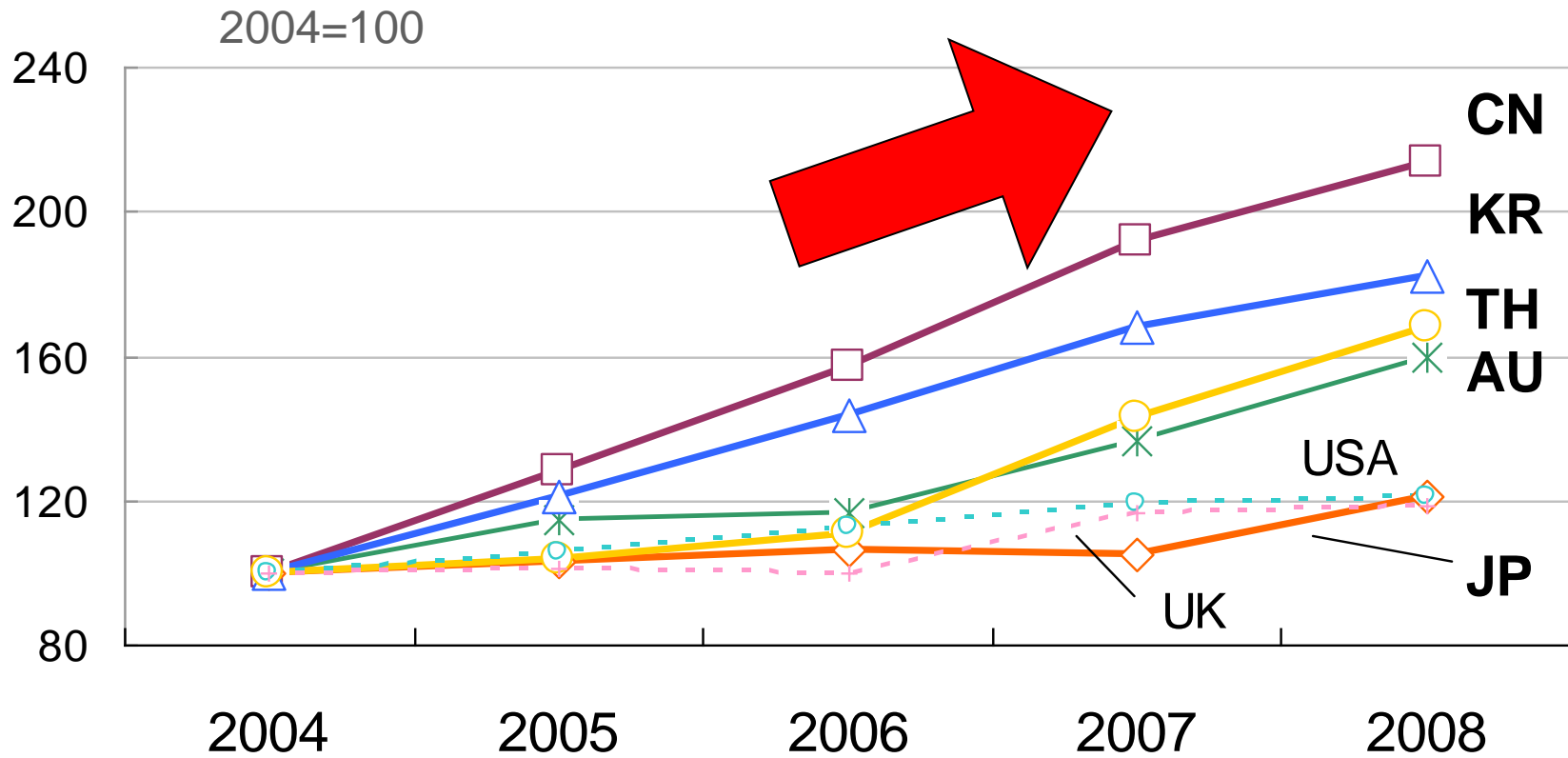


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Growth rate of the Market research turnover (APRC 5 countries and other major countries)



Source: Base on ESOMAR2009

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The Situations of the Online Research in the 5 Countries



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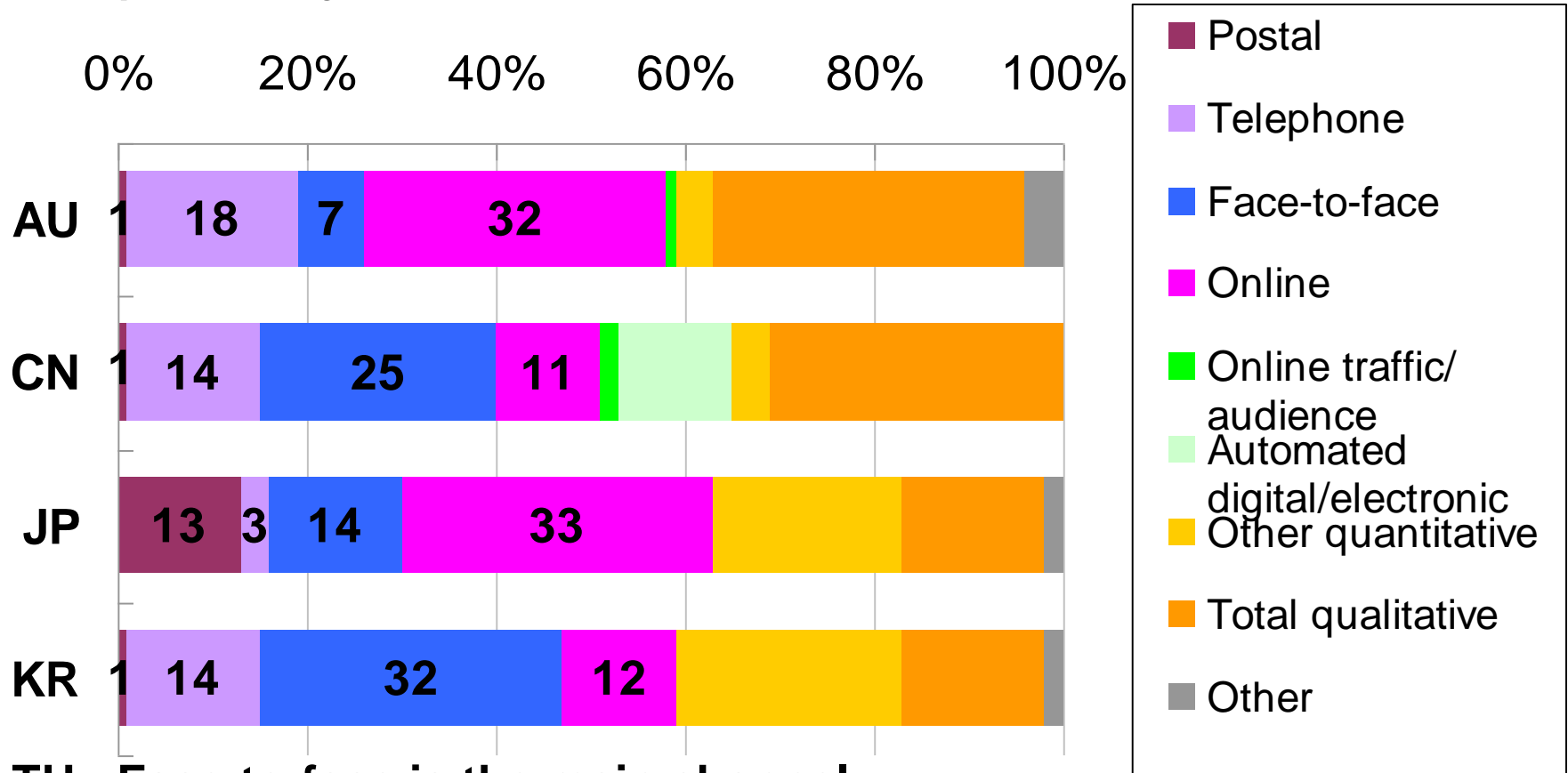
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Summary

- Main methodology of the quantitative research
 - Online in Australia and Japan
 - Offline in China, Korea and Thailand
- Steady sales of the Online research in Australia, Japan and Korea
- Online research in Australia and Japan
 - Low cost
 - High penetration with the Internet

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Spend by research method 2008

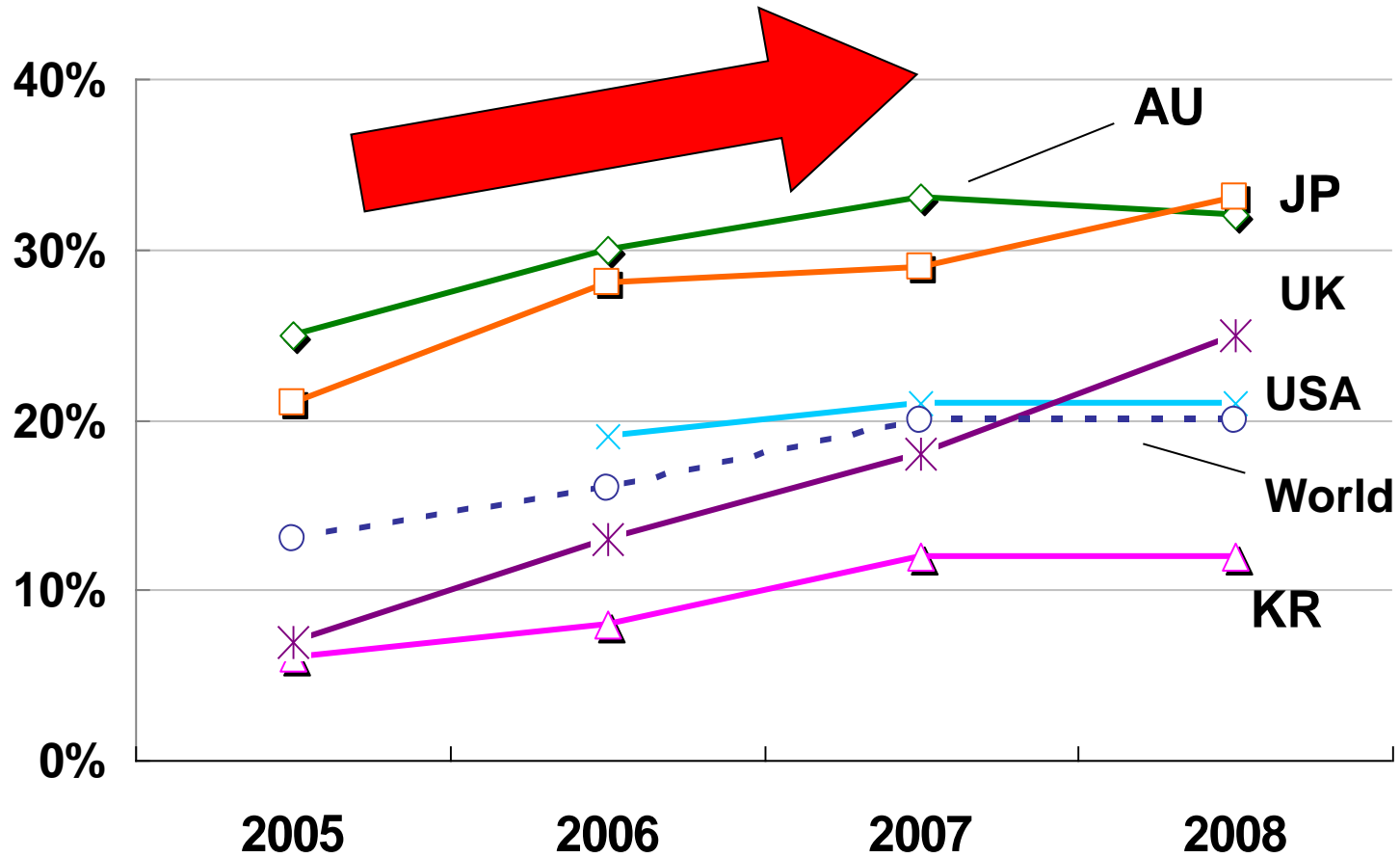


TH : Face-to-face is the main channel.

Online survey is a small amount. (Desk research)

Source: ESOMAR, 2009

Trend of the Online-research sales ratio



Source: ESOMAR, 2009



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Research cost by research method

Case: USAGE AND ATTITUDE SURVEY

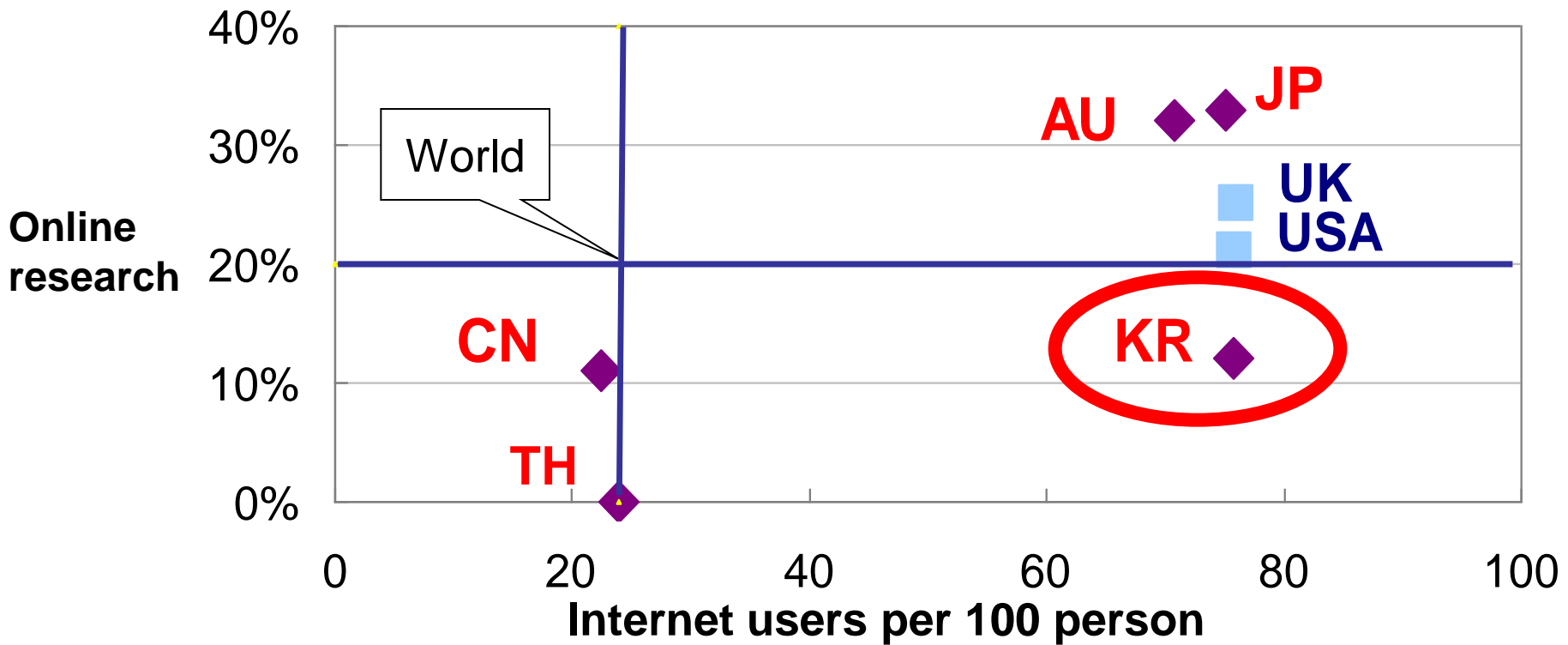
US\$

	Face-to-face in home	CLT (F2F)	Telephon/ CATI	Online
Australia	-	51,298	43,876	17,133
China	10,991	11,724	8,452	7,973
Japan	67,170	68,019	39,659	22,371
Korea	20,516	25,990	11,478	12,753
Thailand	15,067	19,552	16,110	-

Source: ESOMAR,2010

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Internet penetration and Online research spend as a percentage of total spend



Note: TH: Online survey is a small amount. (Desk research) Source: ESOMAR 2009, The World Bank

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The Current Status of the Online Research



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Summary

- Japanese information only
- The following slides show some findings.



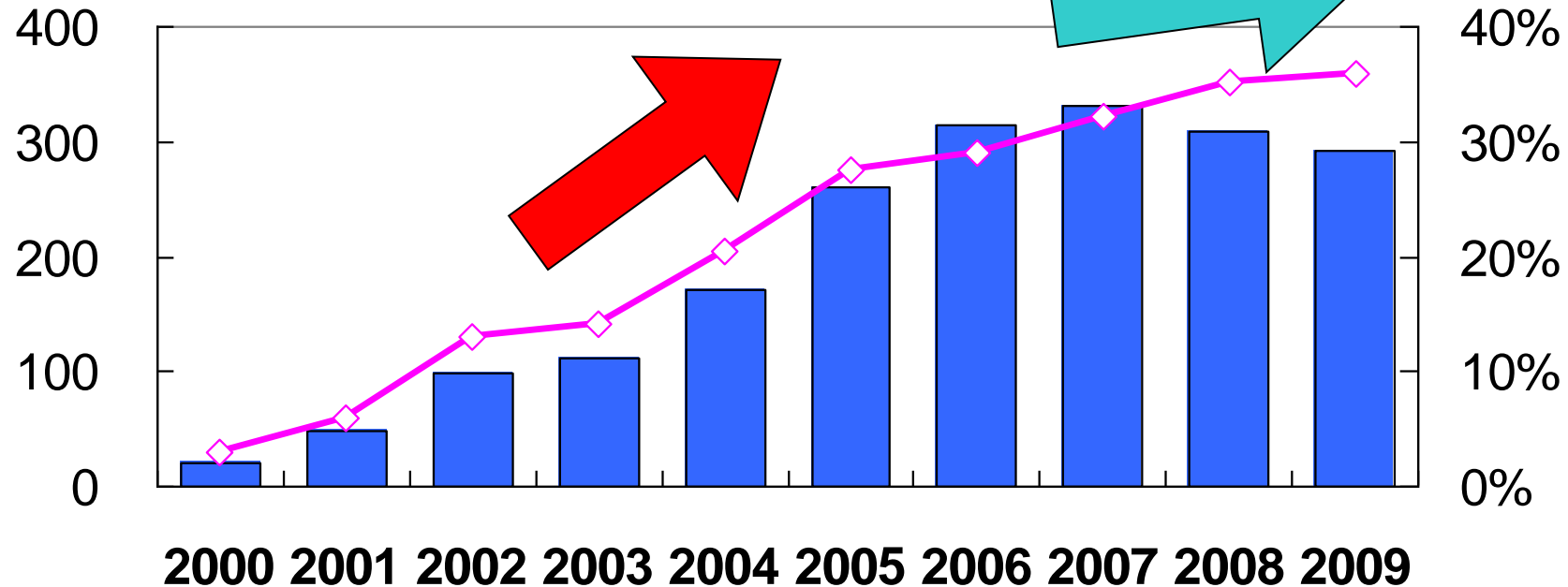
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Trend of Online research spend and a percentage of total spend in Japan

Online research turnover (US\$m)



Source: JMRA "Survey on Business Trend"



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Research Outline of “The Study on the Situations of Online research”

- Research target : Head of Online research section or fieldwork section of the JMRA member companies
- Research methodology : Through internet or faxing self-administrative questionnaire after downloading
- # of respondents : 107 companies out of 149 members (71.8%)
- Main research items :
 - Whether or not Online research is implemented
 - Whether or not internet panel is owned
 - Implementation status, etc.
- Research period : May 28 - June 18, 2010





Summary of the Online Research Study

- Implementing the Online research
- Monitor recruitment
- Panel composition
- Incentives
- Real feelings and issues



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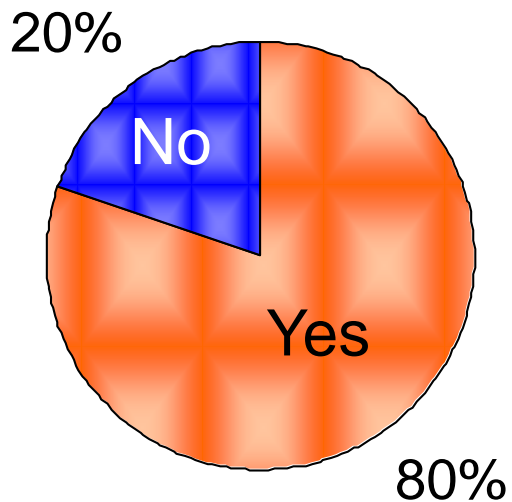


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Online research

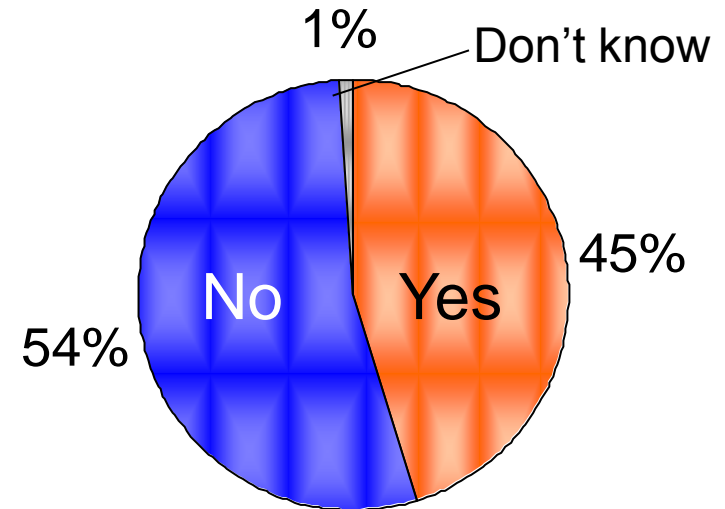
Implementation

of companies : 107



Ownership of Panel

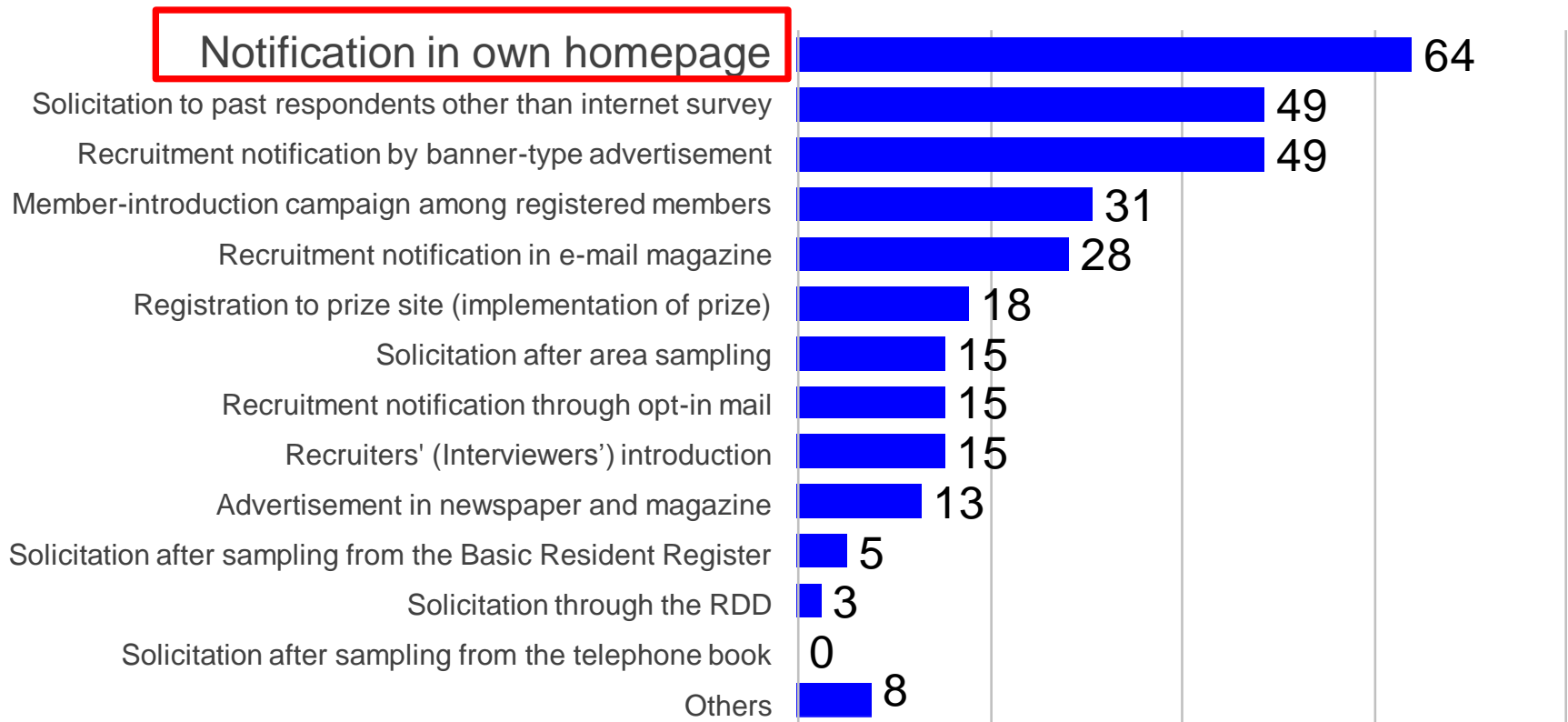
of companies : 86



Panel Development (MA)

of companies: 39

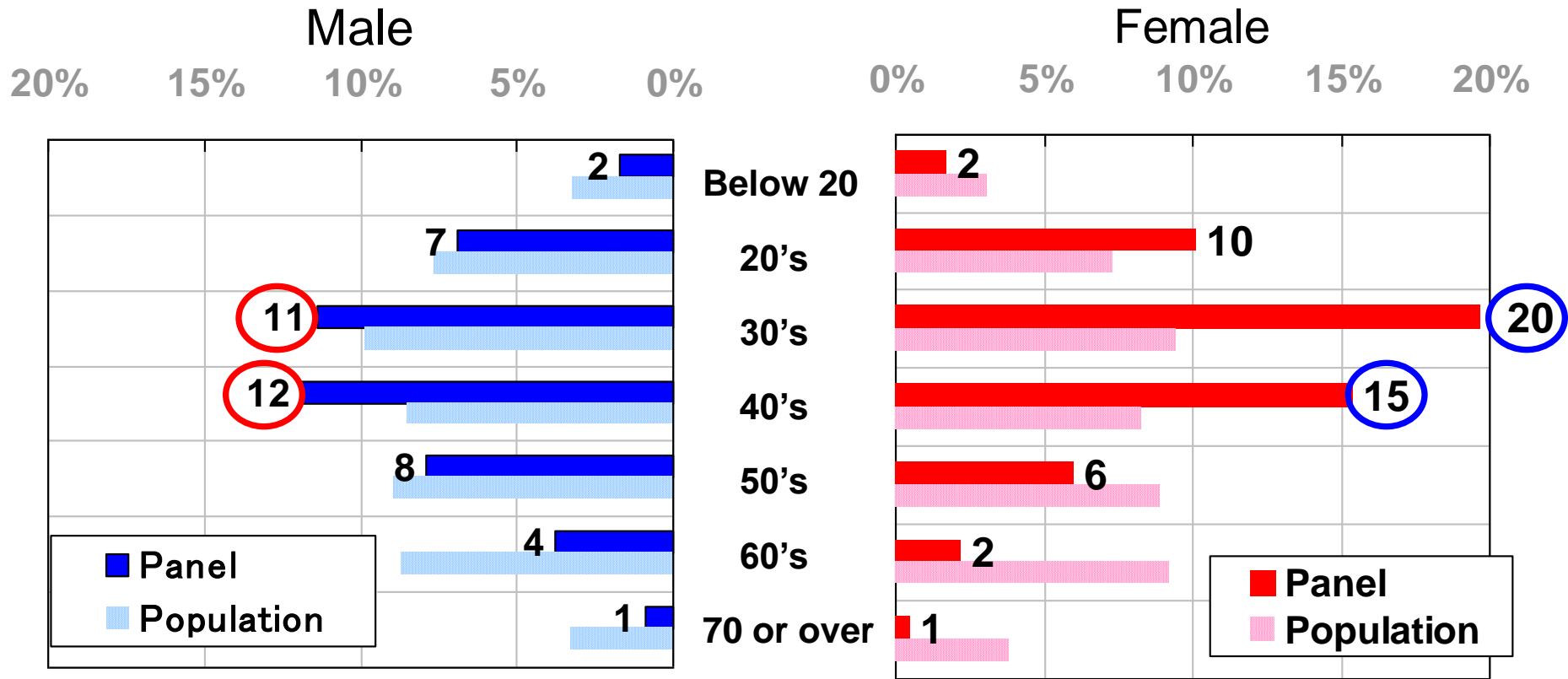
0% 20% 40% 60% 80%



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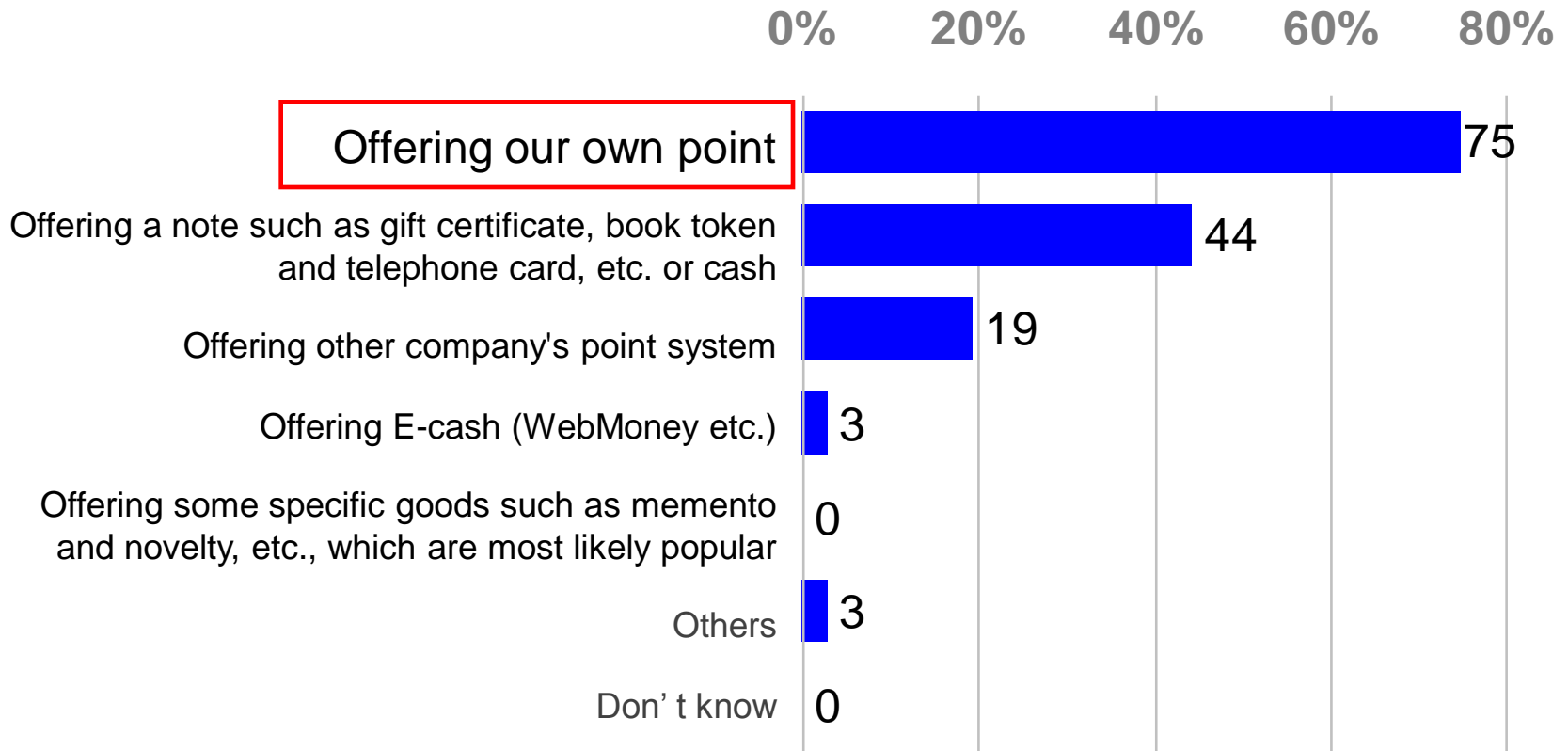
Panel composition by age/gender

(Average percentages by age/gender) # of companies : 33



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Incentives offered (MA) # of companies : 36





Real feelings and issues owned by respondent companies against the online research

Comments from OA question.....

- ✓ Biased age composition of monitors
(a few young and aged monitors)
- ✓ Too much experienced monitors
- ✓ Reliability of responses
- ✓ Excessive price competition



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Issues for the Future



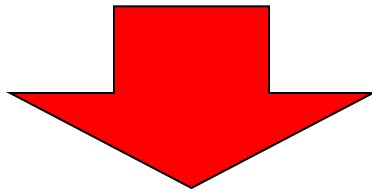
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Expectation on the Online research

- ✓ Fast and fresh data
- ✓ Flexibility
- ✓ Cost effective



- Possibility of becoming a main research methodology in future
- Necessity of quality improvement



Recommendation: Jointly implement an Online Research Study

■ It enables us

- ✓ To identify trend of the Online research in own country
- ✓ To evaluate Online Research using common indicators
- ✓ To share each other's knowledge
- ✓ To do joint studies based on findings obtained from the study



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Thank you !



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