



ASIA
PACIFIC
RESEARCH
COMMITTEE

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ASIA PACIFIC RESEARCH COMMITTEE (APRC)

MINUTES OF COMMITTEE MEETING

Meeting: Asia Pacific Research Committee Interim Meeting

Date: 10 October 2011

Time: 1.00 pm – 4.00pm

Host: CMRA

Venue: Xian International Conference Centre

Apologies: Mr. Kee-hyoung Lee, Mr Ian Thomas

Attendance: **AMSRS/ AMSRO:** Mr Peter Harris, Ms. Elissa Molloy

CMRA: Dr Liu Dehuan, Mr Weng Ruiguang, Mr Andy Zhao

CMRS: Dr Jian-bang Lin

JMRA: Taori-san, Ota-san, Suzuki-san, Tateishi-san, Iiyama-san

KORA: Dr Ick Sang Roh, Mr Ian Kim, Mr Jeong-hoon

MRSM: Ms Rozina Mat Rawi, Mr Barry Ooi

MRSS: Mr Baxter Tan, Mr Martin Tomlinson

TMRS: Ms Viruya Vorakittikun, Ms. Warunee Chookhare, Ms Dangjaiithawin Anantachai

Ota-san welcomed all committee members to the 3rd Asia Pacific Research Committee meeting in Xi'an. Ota-san thanked CMRA for hosting and asked all attendees of the meeting to introduce themselves and the association they represent.

Agenda 1 - Knowledge sharing between associations

A representative from each association updated the committee on the status of their associations and any new initiatives they have undertaken.

AMSRS: AUSTRALIA – update from Peter Harris

- Market good but increasingly competitive
- Membership not grown but remained static
- There has been a reduction in student members
- The professional development program offered by the AMSRS has grown, particularly in the area of webinars.
- The Qualified Practising Market Research accreditation program is strong
- Australia is in the process of developing various collaborative relationships with affiliated associations such as the Australian Marketing Institute
- AMSRS set up a LinkedIn group that now has 1200+ members and is very active.

CMRA: CHINA – Andy Zhao

- The China MR industry and the CMRA have many opportunities and challenges
- 2011 - 8.5 billion RMB (900 million Euro). Growth rate of 11.5%. 16.3% growth rate in 2010. In past very strong growth. In 2010 a lot of merging and competition so value did not grow. Conservative forecast - 2012/ 2013 growth rate of 13%
- Challenges are:
 - Quality control - not just small but also large companies
 - Pressure from price
 - costing up continuously
 - challenges of human resources
- A lot of people are coming to China so the competition is great. There is pressure on providing quality research because the market is so competitive and there is a lot of pressure to do cheap research.
- Price for research went down but costs went up - currency and manpower (living cost more expensive); liberal law changed a lot so not easy to fire people and find talented people. Good people moving to other industries that make more money.
- The industry has a good future in China. Demand getting stronger and stronger. Number of members has doubled in past 4 years. Use new media to advertise themselves. Twitter and FB forbidden in China. There are local social media platforms in China.

CMRS: Taiwan - Dr Jian-bang Lin

- There is a President election in March 2012.
- The challenge for CMRS is how to integrate the individual companies and inform the government that survey research is important.
- The CMRS is a new Society and they are looking to expand membership and increase quality of research conducted in their country.

JMRA: JAPAN - Suzuki-san

- Economically the industry has faced a very serious depreciation. There has been a decline in growth - 2009 5% decline; 2010 - 1% decline and in 2011 there was an even more serious decline in growth.

- From April to June after earthquake - no need for marketing research. Then manufacturing began to recover from July so we have begun to see more active outbound activities
- Policy is to expand their research wing to understand their citizens the most.
- There is a focus at JMRA to promote of research activities in collaboration with govt and industry.
- The JMRA are also encouraging organisations to become certified to ISO20252. One company has now become certified to ISO20252 in Japan.
- The JMRA are also promoting their new research guidelines.

KORA: KOREA

- KORA 44 companies; started 1992; considering individual membership; 2 full time staff; 400 million in industry;
- Current hot topic is social research and polling for election next year. RDD system now used to access the households. Often hold joint seminar with govt.
- Trying to introduce research quality system ISO20252
- Personal information protection law introduced from 1 October 2011 so KORA helping their members with this.

MRSM: MALAYSIA - Rozina

- Malaysia - after GFC - economy not good in 2009 but has improved in 2010 and 2011. The government has introduced a economy transformation plan
- In 2010 there was some decline in value in currency. In 2011 this is now picking up against US dollar.
- A lot of independent firms, less reliance on multi national organizations. A lot of new research from government.
- There have been several mergers of larger companies which has contributed to emerging of smaller companies and freelance researchers in the market.
- Problem with attracting talent; to train new talent and increase research acumen

MRSS: SINGAPORE – Martin Tomlinson

- Martin advised that he has become the Treasurer of the MRSS.
- The MRSS is a relatively new Society, been existence since 2000. No professional staff only volunteers.
- Numbers of members increasing from smaller and independent researchers.
- The government is looking to set up an industry body in government to work with corporate companies to increase revenue into Singapore
- There is a concern about quality; costs rising, clients demanding cheaper research.
- However, there is plenty of opportunity in Singapore

TMRS: THAILAND - Viruya Vorakittikun

- After suffering for 4 years in politics - there is now more stability in Thailand

- People now have more confidence in economy. Growth for Thailand in 2010 was 9.2%
- 3G and smart phones just started working in Thailand and may influence more online research.
- Threats - cost cutting, low quality field services and consultants taking up some MR space Hard to attract talent to industry

Ota-san thanked everyone and advised he would email a copy of the presentations to the committee members.

Action: Ota-san to distribute a copy of the presentations to the committee members via email.

AGENDA 2 - Achievements - what we did and what we are doing

TEAM ALPHA

An update on the activities of Team Alpha was provided by the Team Captain, Andy Zhao. Andy advised that Team Alpha had done one major project this year and that was the multi-country research. Main project for the year. Andy advised it was not an easy project. It generated a lot of work and there were a lot of difficulties. He advised that the results will be late and will not be able to use the results from all countries. It was suggested that we could use it for analysis in the future.

Andy advised that the CMRA conference is divided into 2 parts - one is the APRC conference, the other is the CMRA conference. Andy thanked the JMRA for all their help with arrangements for the APRC conference.

Alpha team could have a regular conference call through Skype to share information about what is up in each country and discuss what the future APRC conference would like etc

The committee members discussed this issue and agreed to the following:

1. We would explore the option of arranging for a research company to host it next year – e.g. SSI, Research Now etc
2. we would consider each country collecting their own data. We also need to consider the cost of conducting a survey is different in each country
3. We should explore options on how the data we collect could be used such as selling it to government, media etc

TEAM BETA

Ota-san explained that as Kee-hyoung Lee from Korea was unable to join the committee meeting today, he would present for team Beta instead.

1) APRC Website promotion

- a. each association has their own website APRC website can be the hub website -linked to the other association's websites to network and share information and knowledge. All associations can link to each other through the APRC tab on the website.
- b. Monitor hits on the APRC site
- c. Emphasize APRC benefits on the top/ home page
- d. Consider ideas to make our website more attractive and useful
- e. Consider sponsorship on the website to generate some more revenue
- f. Decide who is in charge of the APRC site and who should be responsible for its updates etc

Action: Team BETA to consider all the website promotion points above in a teleconference/ or via an email exchange.

Action: Elissa advised she would send through some possible options for banner ads/ sponsorship on the website for Team BETA to consider

Action: All the committee agreed to send through information for the website to make it more useful and practical.

Action: Team GAMMA to finalise the benefits of APRC and add those to the website.

Action: Elissa agreed to add in a sponsorship button on the home page of APRC website.

2) Linked-In; Social Media Networking

- a. Set up an APRC LinkedIn Group
- b. Add all the people we met at the conference in the next few days to the group
- c. This group would encourage information and knowledge sharing
- d. Increase visitors to the APRC site and conferences

Action: Elissa advised she would set up a link to LinkedIn from the homepage of the website

Action: Team BETA to set up LinkedIn Group and discuss other social networking opportunities

Action: All committee members help populate the APRC LinkedIn Group with members

3) APRC directory

- a. Set up a directory of research specialists in Asia Pacific – similar to the ESOMAR one – that could sit on the APRC website.

Action: Team BETA to consider how we could set up an APRC Directory on the APRC website

3) New promotional ideas

- a. Share archive information at each association
- b. Share association activities
- c. Share association factsheet
- d. Novelty with APRC logos for extra revenue
- e. Conference promotion on APRC site
- f. Organise an online seminar
- g. Share research related magazines – collaborative campaign etc

Action: Team BETA to consider potential promotional ideas for APRC further.

TEAM GAMMA

Elissa presented on behalf of team Gamma and updated on the administrative activities of the group that included:

1) Organising information for the annual conference

Elissa acknowledged and thanked the contribution of Weng and his operations team.

2) APRC website

Elissa advised that she had set up the framework and the structure of the site but relied on all associations to help populate the content. It was agreed that the website could be a very useful portal for all members if we update it regularly and share thought leadership and association information.

Action: All committee members help populate the APRC LinkedIn Group with members

3) Membership of APRC

The committee had a general discussion about membership to APRC. It was agreed we need to try to expand APRC membership to other Asian associations in the region.

Action: Team GAMMA to explore how we can get more members on APRC.

ESOMAR advised that they would like to join APRC. The APRC had a discussion about this and agreed that while we would like a strategic alliance with ESOMAR, membership to APRC is limited to national associations in the region (as per our constitution). ESOMAR is not a national association in Asia.

Resolution: The committee agreed that we should have an alliance with ESOMAR, ARIA and EFAMRO but they should not be able to join the APRC committee.

AGENDA 3 – Future issues

Ota-san briefly discussed how we could have more efficient and less-burdensome Operations of APRC administrative matters

He suggested we could outsource some administrative matters such as:

- collecting annual subscription fees
- Periodical updates of each APRC member association
- Controlling budget plans and audit checks of implementation
- Assisting member associations host conferences
- Frequent communications in English among APRC countries
- Promoting inter-group activities (ALPHA, BETA, GAMMA)
- Secretariat affairs for committee members

Committee had a general discussion about outsourcing some activities and was not opposed to taking this action.

Action: Ota-san to co-ordinate the initial outsourcing of these activities.

AGENDA 4 – Financial status

APRC audit report for FY2010 was submitted by JMRA and result is a balance to be carried forward of US\$3,162.

Ota-san then discussed the budget plan for FY2011 and advised we would need to cover expenses of approximately US\$18,500. This would cover website maintenance of US\$6,000; administrative workloads US\$6,000 and collaborative activities of US\$6,500.

As our revenue last year was only US\$9,500 we need to make up the shortfall.

Ota-san suggested that increasing membership fees is inevitable. Committee had a general discussion about how much this should be. Ota-san should three possible revenue stream scenarios.