



ASIA
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ASIA PACIFIC RESEARCH COMMITTEE (APRC)

MINUTES OF COMMITTEE MEETING

Meeting: Asia Pacific Research Committee Summit Meeting

Date: 31 October 2013

Time: 4.00pm – 6.00pm

Host: TMRS

Venue: Grand Millennium Hotel, Sukhumvit, Bangkok, Thailand

Apologies: MRS NZ/AMRO: Ms Winifred Henderson

Attendance: **AMSRS:** Mr Peter Harris, Ms Elissa Molloy and Ms Sarvenaz Ghahreman

AMSRO: Mr Ian Thomas

CMRA: Dr Liu Dehuan, Mr Andy Zhao

CMRS: Mr Ben Chang, Ms Tiffany Chen

JMRA: Mr. Takashi Makita, Mr. Shunichi Uchida, Ms. Kazunori Watanabe, Mr. Tatsuzou Uewaki, Mr. Chiharu Sakai, Mr. Norio Taori, Mr. Michihiro Ota

KORA: Ms. Cindy Shin, Mr. Jung-yul Yang, Dr Ick-sang Roh

MRSM: Mr Barry Ooi, Ms Rozina Mat Rawi

MRSS: Mr Martin Tomlinson, Mr Baxter Tan

TMRS: Ms. Dangjaithawin, Anantachi (Orm), Dr Kreaovan Limapichat, Ms. Viriya Vorakittikun

MMRA: Mr. Davaasuren Chuluunbat, Mr. Amgalan Baatar

Agenda 1 – Welcome to APRC delegates

Orm welcomed all committee members to the 5th Asia Pacific Research Committee summit meeting in Bangkok.

Agenda 1a – Welcome Mongolia Marketing Research Association (MMRA)

Orm welcomed Mr. Davaasuren Chuluunbat and Mr. Amgalan Baatar the representatives of the MMRA to the meeting and to APRC, and expressed the hope that MMRA will be officially joining APRC soon.

Action: AMSRS to follow up with the MMRA with administrative arrangements for joining the APRC.

Agenda 1b – Update on conference activities

- Orm noted that the conference has had over 300 registrations, which is a fantastic outcome.
- All workshops were booked out with over 40 registrations in each.
- All APRC members were advised to meet in the lobby at 6pm to join the buses going to the special cruise being hosted by TMRS and TCEB (Thailand Convention and Exhibition Bureau). Everyone was asked to wear their special scarves in order to display their APRC Board status, so the other cruise attendees could approach them for more information about APRC and GRBN.
- The conference is scheduled from 9am – 4pm on the 1 November and Orm asked everyone to register by 8.30am so they could start the conference at 9am sharp.

Agenda 2 – Income and expense report for 2013/14

The Secretary-General, Elissa Molloy, provided a written and a verbal financial report for the APRC delegates. Elissa thanked Orm and her team for their hard work and excellent organisation skills in putting together this year's APRC Conference.

- Explained the format of the agenda papers and the collaboration study invoices.
- Provided an update on the financial status of APRC noting that the budget is a modest one. Copy of the report is attached in Appendix A.
- CMRA paid their membership fees in cash to Elissa at the summit meeting.
- There were no questions raised, Elissa invited all APRC members to contact AMSRS if they have any questions about the budget.
- ***Action: Elissa to bank the CMRA membership fees and send them a receipt.***

Discussion about fees and it was agreed that fees should remain the same and other forms of income sourced. Further discussion required on this topic down the track.

Agenda 3 – APRC Secretariat update for 2013

- Elissa provided a written report from the AMSRS secretariat. Elissa spoke to her report and noted that South Africa had decided not to join the APRC. The South African Association, SAMRA, decided it would be best to join other African associations to develop their own federation, and then join the GRBN.
- Elissa invited everyone to submit papers to the Australasian Market and Social Research journal that is administered by the AMSRS. Elissa advised that the AMSRS would love to make it an APRC journal with contributions from around the Asia Pacific region.
- Elissa also invited all APRC associations and their members to take advantage of the special price for APRC members to attend AMSRS webinars. Elissa advised that a copy of the APRC webinar brochure was in their information pack provided to at the meeting.

Agenda 4 – Update on APRC 8 country collaboration study 2013

Orm spoke to this agenda item and provided the delegates with an update on the APRC 8 country collaboration study. Orm advised the following

- This year we reduced the number of questions, because last year we received feedback from some countries that the study was too long.
- We have kept the core questions to keep the data developing on major trends.
- The theme of the survey this year was the power of women in Asia – the power of women as consumers..

Orm advised that a copy of the slides on this study were included in a folder that was in everyone's hotel room when they arrived (along with the colourful Thai scarf). Orm advised she would provide the data for all the APRC countries after the conference.

Peter commented that it would be good to get more coverage on the study and asked whether we could we do an APRC webinar on women in research, especially since this topic is gathering momentum worldwide. There's a group called 'Women in research', could we use the content we have gathered to do a webinar?

Orm noted that the study belongs to all the APRC; she asked the representatives in the room if they would be happy to share it more widely and also reference the data with the APRC logo when using it.

Orm noted that they shared the results from the collaborative study with their Board members to show them why it is good to be part of the APRC, so they see more tangible benefits.

RESOLUTION: Everyone agreed that all APRC members could use and promote the data.

Action: Orm to send the APRC raw data and electronic presentation slides to Sarvenaz to distribute to the APRC committee.

Action: Sarvenaz to send link to raw data and excel format of the study to all APRC members. Sarvenaz to load the data onto the APRC website in the member centre.

Action: Sarvenaz to distribute a copy of the electronic copy of slides to all APRC members via email.

Agenda 5 – Update on GRBN activities

Elissa provided an update, noting the following actions GRBN has taken in the last 12 months:

1) Draft GRBN Mobile Research Guidelines:

GRBN launched a draft version of the Mobile research guidelines. It was compiled by AMSRS, CASRO and MRS UK, it was initiated under GRBN.

Elissa offered the opportunity to adopt the guidelines if each association agrees with them. Each association can tailor them to suit their own country. We can include an appendix at the end of the guidelines for each country. Elissa thanked Martin Tomlinson from MRSS for his involvement in the sub-committee, as well as Diane Bowers CASRO President, Debra Harding and Barry Ryan from MRS UK.

Elissa offered her assistance in tailoring the guidelines to fit with the other associations. Elissa noted that this guideline does not compete with ESOMAR's guidelines, they are complimentary. This guideline goes into more detail than the ESOMAR guidelines. This guideline recognises the expertise of the Asia Pacific research companies in this field. GRBN would love to receive any feedback you may have on the guideline, as you are seen as the thought leaders and experts in this field.

Action: APRC Committee members to review the draft GRBN Mobile research guidelines and provide feedback to Elissa.

If you would like to adopt these guidelines, please let us know so that we can add your logo to the front page and any special requirements for your country to the appendixes. The more country's that are involved the better it will be as it will provide a more global perspective for anyone doing multi-country surveys.

Action: Elissa to send follow-up email to APRC members to ask for their feedback on the draft GRBN Mobile research guidelines.

Action: Sarvenaz to email an electronic copy of the draft GRBN Mobile research guidelines to all APRC members.

Tatsuzo Uewaki-san from JMRA enquired as to how the draft GRBN Mobile guidelines were written:

Elissa explained that all mobile devices were included in the guidelines, e.g. iPad, mobile, sms etc...

Peter Milla from CASRO chaired the committee. The committee reviewed the current CASRO and ESOMAR guideline and drafted new guidelines and then sub-committees from each federation were formed to obtain feedback. Martin from MRSS sat on the AMSRS sub-committee.

Elissa noted that APRC associations and their members are the experts in mobile research and their feedback on this new guideline would really be appreciated..

Elissa noted that in the draft guidelines there is a section mentioning the requirements for each country, e.g. UK, US and Australia, we would really like to include all the Asian country's requirements in there too.

Elissa requested the following:

- Could each association please let us know if you are happy to endorse the guidelines or let us know if you would like to adopt them and we can include your logo on the guideline document

The guideline does not belong to just AMSRS, CASRO and MRS UK; it belongs to all APRC, ARIA and EFAMRO members.

2) General GRBN updates:

The GRBN committee met today, representatives from ARIA and EFAMRO attended as well. From ARIA we had Diane Bowers the President of CASRO and Alex Garnica who is the, ARIA Executive Director. From EFAMRO we had Andrew Cannon who is the EFAMRO President, and Debrah Harding and Barry Ryan from MRS UK.

- We discussed ideas on developing more guidelines in Social Media Research
- Our GRBN activities are about how we support national associations.
- We would like to grow the GRBN brand, prominence, presence and reputation.
- We are achieving everything with no funding. Currently funding for GRBN is being provided by AMSRS, CASRO and MRS.
- We plan to develop a model that does not require any funding from the national associations.
- The draft GRBN mobile guidelines are the first tangible result of our GRBN membership.
- We want to ensure that the voice we have at GRBN is representative of APRC members, please let us know if there is anything you want us to represent on your behalf.
- We want to make it so that the guidelines have input from all APRC members we are not going to say 'here is the guideline you have to use it'.
- We want to provide global conferences at member rates.
- GRBN will have a lot more activity over the next 12 months.
- If anyone else would like to contribute, or join the meetings of GRBN, we would really like that, but there is a lot of work involved in the role.

Andy Zhao from CMRA thanked Elissa and Peter for their hard work with GRBN, but he noted that it is hard enough promoting APRC to their members let alone trying to inform them about GRBN. He recommended that a power point presentation be developed that

could be presented at association conferences, and provide an explanation about APRC and GRBN.

Action: Elissa to prepare power point charts about APRC and GRBN that can be promoted at local conferences.

Mr Ick-sang Roh from KORA asked who the GRBN is made up of? Who are the executive GRBN committee members?

Peter explained that anyone who is a member of APRC, EFAMRO, and ARIA automatically becomes a member of GRBN.

The GRBN represents 38 GRBN associations, the executive committee members of GRBN are:

EFAMRO (European federation):

- Barry Ryan (MRS UK employee and legal advisor to EFAMRO),
- Debra Harding (Chief Operating Officer of MRS UK), and
- Andrew Cannon (EFAMRO President).

These representatives sit on the EFAMRO executive Board.

The EFAMRO executive Board nominated them to be the GRBN representatives.

ARIA (which consists of the North and South Americas, Central America and Canada):

- Diane Bowers (President of CASRO)
- Alex Garnica (Executive Director of ARIA) and
- Jeffrey Resnick, (immediate past President of CASRO).

APRC:

- Peter (APRC Vice Chair and
- Elissa (APRC Secretary General).

Each year we could decide who gets nominated to represent APRC.

- GRBN is not a membership organisation it is merely a networking and collaboration network.
- Peter and Elissa are the voice of APRC on that committee.
- Everything done on that committee they will try and bring back for APRC members.
- All the resources that have been developed are on the GRBN website and all APRC members can access that information. This includes all APRC associations and your members.

Action: Sarvenaz to send email with GRBN website access for APRC members.

- The GRBN has completed a code comparison document, comparing the Codes of US, UK, Germany, Canada, Australia and the ESOMAR Code. If anyone would like their code included in that comparison you just have to give a copy of your Code to Barry Ryan (the legal mind) and he will review your code and add it to that document.

- That is just one example of the documents contained on the GRBN member site. There are many support documents included there.
- There is no funding, at the moment the funding is coming from MRS UK, CASRO and AMSRS. We are donating our time and money to develop resources, just as we do for APRC.
- This means that you can all go to the conferences of the main associations (MRS UK, CASRO and AMSRS) and attend the conferences at member rates.

Agenda 6 – APRC association updates

Each of the nine countries gave an update on the activities of their association/s in the past year. Due to the time constraints this agenda item was only allowed 10 minutes. As all associations provided an update on in writing prior to the meeting, a few minutes were allowed for questions.

Australia - AMSRS

Elissa noted a negative 3% growth, based on a study completed in Australia consisting of 111 research companies. Things are stable in Australia but have declined slightly. Peter noted that client budgets are shrinking, and there is less research being conducted and more analysis of existing data.

Ben-Chang Shia noted the same challenge being faced by CMRS. Baxter Tan from MRSS asked if the decline is across the board?

China - CMRA

- Andy noted a growth of 6% – 7% this year versus a growth of 13% – 14% last year.
- The salary paid for fieldwork is the same as 20 years ago, even though the fieldwork is costing 10 or 20 times what it used to. This leads to decreased quality.
- The market is definitely growing the growth has slowed.
- There are a lot of 'Big Data' companies in the market place, but they are not CMRA members.
- CMRA is currently made up of research companies; we'd like to try and draw in the Big' Data' companies. So far it has not been successful because they have their own society.

Chinese Taipei – CMRS

- Took their report as read, and no questions were raised.

Japan – JMRA

- Uewaki-san noted that the challenges raised by other associations are being faced by JMRA also.
- Non research companies are coming more into research.

- Clients want more for less.
- Japan's gross rate for this year was 5.3 million.

Korea – KORA

- Cindy noted that their situation is similar to China. Overall stable but a slight decrease in growth.
- A lot of the large companies are doing research outside Korea.
- We are working with the Bureau of statistics to promote the importance of research and the minimum required costs for research. To ensure that costs are kept fair.
- We are conducting more hybrid research in order to combat the decrease in response rates.
- Big Data is a threat to our industry.
- Though SNS and mobile are very important in data collection, they have limitations and they cannot represent all consumers. If we say this to our clients with one voice they may be forced to listen.

Malaysia – MRSM

- We have received endorsement from our members to start a database on serial respondents. It is still in the implementation stage.
- Barry noted that they are into single digit growth rates this year.
- The challenge is to keep the profile on MRSM.

New Zealand – MRSNZ/ AMRO

Elissa noted that unfortunately New Zealand could not send any representatives to the conference, but that the most exciting news is that MRSNZ and AMRO have decided to join their two associations.

Singapore – MRSS

- Research in Singapore is being commoditised (it is not a new problem but an ongoing one). As the society for market research we have been trying to improve the perception of the industry.
- This year we launched our certificate in market research, which shows an improved quality standard. We are looking at developing something like the AMSRS's QPMR program. We have a dedicated sub-committee in place to work on improving the brand of MRSS.
- We're also looking at who we should be bringing into the society. Considering the increase in PR companies and advertising companies doing their own research.

Mongolia – MMRA

- Mongolia has just become the Mongolian Market Research Association (MMRA) in the last few weeks.

- Mr. Amgalan Baatar introduced himself; he is the director of MMCG (Mongolian Marketing Consulting Group) which was started in 2002.
- Economic growth is very high in Mongolia.
- Quality in research is not as it should be, in order to increase the quality in research MMCG joined ESOMAR in 2008.
- Last year we attended a research conference in Munich Germany, it made us realise that we need to be connected and networking with our own regional associations. Which lead us to APRC.

Thailand – TMRS

- Kreaovan noted that the Thailand market research companies made over 80 million euros last year. Thailand is a very small country, but in mobile research standards we're number 18.
- One of the main challenges being faced by our industry is the lack of experienced researchers.

Action Sarvenaz to send slides from meeting to everyone

Agenda 7 – Future direction and organisation of APRC

Peter and Barry managed this agenda item.

They raised the following questions:

- How can APRC help the local associations?
- Is APRC relevant?
- Are we able to carry on with the current arrangement
- Do we need a more structured format?
- We have had 5 APRC summits and 5 conferences, what do we want to be known for?
- Right now we are using the services of the AMSRS, do we want something more permanent.

Peter noted the following:

- We have a very modest profit and loss.
- We are not going to ask for any more money.
- We want to think of ways to increase the brand of APRC in our region
- More content, time or information on what is happening in your area.
- We need more information flow.
- Language is one of our barriers.
- We're up against organisations that have a lot of money and stature.

What we have tried over the last five years:

- APRC website
- Sharing webinars, giving access to training.
- Collaborative study

- Summit each year

Peter noted that he and Barry thought there might be a better way forward. Noting that the APRC members need to vocalise what they need from APRC, he asked if any of the following were what they needed:

- APRC Possible Paths Towards Greater Relevance
 - Education and training
 - Professional standards and company quality assurance
 - Mobile thought leadership
 - Privacy and data protection

Peter noted that only a few of these ideas could be taken on at a time.

Barry agreed that a maximum of two of those ideas should be taken on and used as a platform to move forward.

Right now the services of AMSRS are being used for APRC's admin needs. Do we need something more permanent?

The following ideas and questions were raised by Peter, Barry and the committee members:

CMRA – Andy Zhao

- CMRA wanted to link our members with the international industry. For Japan this has happened as there is always many Japanese delegates that attend the APRC conferences, but for CMRA this has not quite happened yet, with only the two of us and possibly a third delegate whom we don't know attending the conference. How can we promote APRC and how to make our members feel that they can benefit from it? If we can achieve that then we are 90% there.
- Increased fees are very difficult; we can probably find a way to find revenue for APRC.

TMRS – Orm Dangjaithawin Anantachai

- Orm noted that what APRC stands for, is different from ESOMAR, Europe and the Americas, by putting together things like the GRBN Mobile guidelines, according to the needs of each country we are moving towards being relevant to APRC members. The next step is to try and get endorsement from APRC members and one tool we have is the collaborative study in this way.
- Orm noted that she cannot imagine anyone else other than AMSRS managing the administration of APRC, if anyone is going to be brought in on a permanent basis then we need to find a way to fund it.
- The idea of changing the Chair each year is not a good idea; the chair person should be there for 5 years. Recommended Peter be the chair for the next 5 years.
- If we get clients to pay for a few questions that get included in the collaborative study, we could sell it as an omnibus survey.

KOREA – Ick-sang Roh

- We need more alliances
- We need more senior speakers for our conferences
- Ultimately we need more money.
- It is fair that we pay a salary to the secretariat office. We are always depending on them.
- We should increase membership fee from next year.

Multi-country study ideas:

AMSRS – Elissa Molloy

An idea from GRBN is having 2 questions that are asked all over the globe. They are suggesting mind, mood questions. About the confidence level and how researchers feel about the future. EFAMRO and CARO and ARIA have asked 2 questions, as part of their research this year. Australia included those questions as part of the RICA study this year. The questions are added as appendix B.

We could then analyse them across the globe. Then we've have a nice piece of information that we could take back to our members and to clients.

Action: Elissa to send the 2 mind mood questions from GRBN to all APRC members. The questions are added in as appendix B.

- Andy asked how ESOMAR does their research; Elissa noted that they ask their members to do it. Then all the members provide the responses to them. We could create a standard methodology for this research.
- If we can coincide it with a global release it will be very powerful research indeed. It would effectively be competing with ESOMAR.
- If we could do a standard methodology of market research survey across the globe, we would be the only one that has this. CMRA can confirm that ESOMAR's Chinese numbers are not from CMRA. We can then create a currency.

Peter thanked everyone for their input and apologised for having to cut the discussion short.

Agenda 8 – How we prepare for next APRC Conference: 2014, 2014 and 2016

Orm thanked everyone for attending and apologised for the rush but noted that we don't have time to discuss this agenda item.

Orm asked everyone to email their views on the crucial questions posed below.

Action: APRC members to provide feedback on the following questions: How we want to continue? What do we want to stand for?

Orm advised that she is now formally handing over the Chair of the APRC to Barry from MRSM. She wished him luck with the role and also commented that being the chair of

APRC and organising the conference is too much for one person and this re-arrangement should be reviewed at the next APRC committee meeting in Malaysia.

Action: APRC Committee to review the executive committee structure in Malaysia in 2014.

Meeting closed: at 6pm.

Appendix A

2. Income and expense report for 2013/2014



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APRC Audit Report (From 1st January till 23 October 2013)						
Balance carried forward from 2012					Total	USD 1,856.45
Income:						
Annual membership fees from eight countries initial founding association						
	Member	Invoice Number	Member Fee (USD)	Received Date	Amount Received	
	AMSRS/AMSRO	APRC 0021	USD 3,000.00	30/04/2013	USD 3,000.00	
	CMRA	APRC 0022	USD 4,000.00			
	CMRS	APRC 0023	USD 1,000.00	20/08/2013	USD 1,000.00	
	JMRA	APRC 0034	USD 6,000.00	10/06/2013	USD 6,000.00	
	KORA	APRC 0025	USD 2,000.00	11/04/2013	USD 2,000.00	
	MRSS	APRC 0027	USD 1,500.00	13/08/2013	USD 1,500.00	
	MRSM	APRC 0026	USD 1,000.00	7/05/2013	USD 1,000.00	
	TMRS	APRC 0028	USD 1,500.00	23/09/2013	USD 1,500.00	
	MRSNZ	APRC 0019	USD 500.00	30/04/2013	USD 500.00	
	AMRO	APRC 0020	USD 500.00	17/04/2013	USD 500.00	
		Total	USD 21,000.00	Total	USD 17,000.00	
APRC Eight Country Collaborative Research Study 2013						
	Member	Invoice Number	Member Fee (USD)	Received Date	Amount Received	
	AMSRS	APRC 0031	USD 1,500.00			
	CMRS	APRC 0033	USD 500.00			
	JMRA	APRC 0044	USD 2,500.00			
	KORA	APRC 0035	USD 1,000.00			
	MRSS	APRC 0037	USD 500.00			
	MRSM	APRC 0036	USD 500.00			
	TMRS	APRC 0038	USD 750.00			
	AMRO	APRC 0030	USD 500.00			
		Total	USD 7,750.00	Total	USD 0.00	
APRC Eight Country Collaborative Research Study 2013 - Additional Subsidy						
	Member	Invoice Number	Member Fee (USD)	Received Date	Amount Received	
	AMSRS	APRC 0041	USD 592.00			
	APRC	From conference budget	USD 2,658.00			
		Total	USD 3,250.00	Total	USD 0.00	
APRC Eight Country Collaborative Research Study 2013 Total					USD 11,000.00	
	Income:			Total	USD 17,000.00	

Expenditure: Administrative and operating costs of the APRC			
2013 Administration fee paid to AMSRS			
for first half of year		USD 2,750.00	
for second half of year			
(USD 2,750.00)			
2013 Website maintenance paid to AMSRS			
for full year (www.aprc-research.com)			
(USD 2,750.00)			
APRC meeting in Vietnam			
Intercontinental - Meeting room rental		USD 635.25	
APRC Conference in Thailand			
2013 APRC conference sponsorship – 1 booth - SSI			
(USD 3,700.00)			
2013 APRC Meeting package – 28 people			
(USD 1,960.00)			
2013 APRC registration fee for committee – 14 people			
(USD 2,590.00)			
2013 APRC Eight Country Collaborative Research Study	APRC share of balance of survey costs	(USD 2,658.00)	
SSI Japan - Invoice 2013/9/30	Total Conference expense	(USD 10,908.00)	
(USD 11,000.00)			
Note: Expenditure in BOLD are amounts to be paid.			
2013 Bank fees of funds transferred and payments received			
JMRA		USD 9.71	
KORA		USD 10.83	
MRSM		USD 15.50	
TMRS		USD 14.70	
CASRO		USD 0.00	
AMRO		USD 35.70	
CMRS		USD 9.43	
CMRA		USD 0.00	
MRSNZ		USD 30.65	
MRSS		USD 0.00	
			Total USD 3,511.77
Balance carried forward as per bank statement 23 October 2013			Total USD 15,344.68

APRC Budget Plan of FY 2013			
Balance carried forward from 2012		Total	USD 1,856.45
Income:			
Annual membership fees from nine countries			
Member			Member Fee (USD)
AMSRS/AMSRO			USD 3,000.00
CMRA			USD 4,000.00
CMRS			USD 1,000.00
JMRA			USD 6,000.00
KORA			USD 2,000.00
MRSS			USD 1,500.00
MRSM			USD 1,000.00
TMRS			USD 1,500.00
MRSNZ/AMRO			USD 1,000.00
		Total	USD 21,000.00
Income:		Total	USD 21,000.00
Expenditure: Administrative and operating costs of the APRC			
2013 Administration fee paid to AMSRS			
	for first half of year	USD 2,750.00	
	for second half of year	USD 2,750.00	
2013 Website maintenance paid to AMSRS			
	for full year (www.aprc-research.com)	USD 2,750.00	
2013 Conference payments to TMRS			
	2013 APRC conference costs	USD 12,000.00	
2013 Bank fees of funds transferred and payments received			
	2013 Bank fees	USD 300.00	
			Total USD 20,550.00
Balance to carry forward at end of 2013		Total	USD 2,306.45

APRC Budget Plan of FY 2013 (Revised 23 October 2013)		
Balance carried forward from 2012		Total USD 1,856.45
Income:		
Annual membership fees from nine countries		
Member		Member Fee (USD)
AMSRS/AMSRO		USD 3,000.00
CMRA		USD 4,000.00
CMRS		USD 1,000.00
JMRA		USD 6,000.00
KORA		USD 2,000.00
MRSS		USD 1,500.00
MRSM		USD 1,000.00
TMRS		USD 1,500.00
MRSNZ/AMRO		USD 1,000.00
Membership Fees	Total	USD 21,000.00
APRC Eight Country Collaborative Research Study 2013		
Member		Member Fee (USD)
AMSRS		USD 1,500.00
CMRS		USD 500.00
JMRA		USD 2,500.00
KORA		USD 1,000.00
MRSS		USD 500.00
MRSM		USD 500.00
TMRS		USD 750.00
AMRO		USD 500.00
AMSRS (Additional)		USD 592.00
APRC Eight Country Collaborative Research Study 2013	Total	USD 8,342.00
Total Income:	Total	USD 29,342.00
Expenditure: Administrative and operating costs of the APRC		
2013 Administration fee paid to AMSRS		
	for first half of year	USD 2,750.00
	for second half of year	USD 2,750.00
2013 Website maintenance paid to AMSRS		
	for full year (www.aprc-research.com)	USD 2,750.00
APRC meeting in Vietnam		
	Intercontinental - Meeting room rental	USD 635.25
2013 Conference payments to TMRS		
	2013 APRC conference costs	USD 8,250.00
2013 APRC Eight Country Collaborative Research Study		
	SSI Japan - Invoice 2013/9/30	USD 11,000.00
2013 Bank fees of funds transferred and payments received		
	2013 Bank fees	USD 300.00
Total Expenditure	Total	USD 28,435.25
Balance to carry forward at end of 2013	Total	USD 2,763.20

APRC Budget Plan of FY 2014		
Balance carried forward from 2013		Total USD 2,763.20
Income:		
Annual membership fees for nine countries		
Member		Member Fee (USD)
AMSRS/AMSRO		USD 3,000.00
CMRA		USD 5,000.00
CMRS		USD 1,000.00
JMRA		USD 6,000.00
KORA		USD 2,000.00
MRSS		USD 1,500.00
MRSM		USD 1,000.00
TMRS		USD 1,500.00
MRSNZ/AMRO		USD 1,000.00
	Total	USD 22,000.00
Income:	Total	USD 22,000.00
Expenditure: Administrative and operating costs of the APRC		
2014 Administration fee paid to AMSRS		
	for first half of year	USD 2,750.00
	for second half of year	USD 2,750.00
2014 Website maintenance paid to AMSRS		
	for full year (www.aprc-research.com)	USD 2,750.00
2014 Conference payments to MRSS		
	2014 APRC conference costs	USD 12,000.00
2014 Bank fees of funds transferred and payments received		
	2014 Bank fees	USD 300.00
	Total	USD 20,550.00
Balance to carry forward at end of 2014	Total	USD 4,213.20

Appendix B

Mind Mood Questions to be added to all annual surveys for all associations:

The Questions (unless otherwise agreed)

Q1. Thinking about the year ahead, do you think your research revenues will be higher than, lower than, or about the same as 2012?

Higher than 2012 - By what percent (best estimate): %

Lower than 2012 - By what percent (best estimate): %

About the same as 2012

Don't know

Q2. Looking at the research industry in INSERT COUNTRY NAME overall, what are your expectations for growth over the next 12 months?

The industry will grow

The industry will decline

The industry will stay about the same size

Don't know

Required data