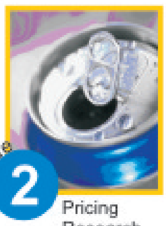
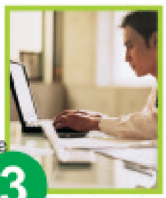
IMRB international IMPRINT


Page 2 Pricing Research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## President's Desk

thomas.puliyel@imrbint.com

Dear Friends,

This inaugural issue of IMPRINT is our attempt to initiate a dialogue with you to co-create research services which are of better value to you. In our own research industry, we are discussing the value of co-creation of insight by involving the customer. And this is another of our steps in that process.

While we share with you what is happening in our company and our success stories, you might want to write to any of the authors featured in IMPRINT or to me, to understand how IMRB can bring together their best minds to craft a unique solution to the problems at hand. We celebrate along with you on your successes as our own business can only grow if your business succeeds and flourishes.

The markets of the future might demand that we, both as Clients and researchers, give up our world-view that large global products can meet the needs of today's consumers. Trying to treat markets as large homogenous masses and creating offerings that can satisfy the needs of 'majorities' will be punished in the market place. Some industries that have already recognized the merits of differentiated marketing in India -- like publishing, broadcasting and telecom – see the benefits reflected in their P&L accounts. As a research industry too we have been so enamoured by our own large normative databases, that sometimes we judge the merits of new ideas based on successes of the past. But rules of marketing have changed and so must we.

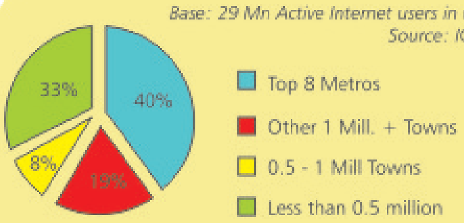
Today, we see many of our marketers and journalists unsure of the India growth story. We continue to have an optimistic economist as Finance Minster and aggressive fmcg marketers raising prices, but we have a halting industrial growth and a stock market that keeps looking west-ward for direction. Perhaps we should not be seeking a generalised story but different ones for each sector. And we need to identify specific cues for each sector to attempt to map a sector's trajectory of growth.

We are living in exciting times. The promise is great. But whether we are successful or not will depend on our ability to think and change.

## did U know?

As per ICube 2007 (IMRB's syndicated report on the Internet market in India, prepared by its specialist divison, eTech Group), one third of the Internet users come from small towns having a population of less than 0.5 million. The Internet usage in these towns is growing at a whooping 124% as compared to a growth rate of dismal 12% in Top 8 Metros. And you thought Internet usage is only confined to the big cities?

*Base: 29 Mn Active Internet users in urban India*
*Source: ICube, 2007*

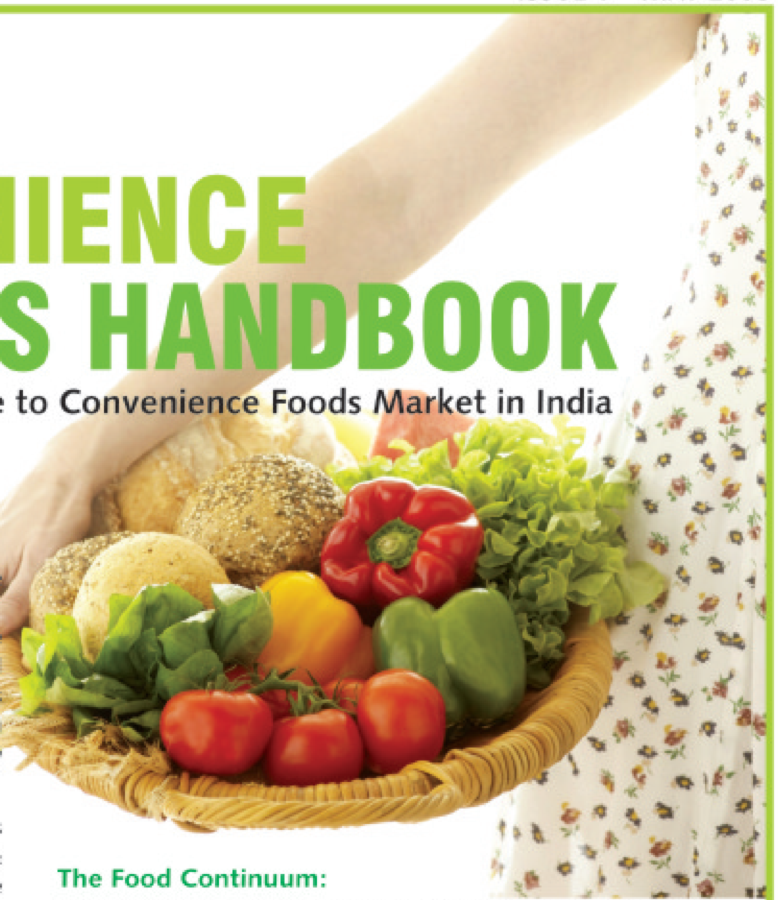



NFS FOUR

# CONVENIENCE FOODS HANDBOOK

## A definitive guide to Convenience Foods Market in India

Dolly Jha | dolly.jha@imrbint.com
Shabari Shetty | shabari.shetty@imrbint.com



Sweeping changes in lifestyle have currently become the norm in cities across India. Rapid urbanization, rising household income and an increased exposure to global lifestyle thanks to the media exposure and overseas travel has meant that the average Indian has never had it better. An offshoot of the increasing affluence has meant a sea change in the culinary habits of the Indian middle class.

Just look around what your local vegetable vendor has on offer and you will find exotic Broccoli, Celery & Iceberg Lettuce vying for space with the humble Brinjal & Spinach. Supermarkets have large sections devoted to 'Food'. Food ranging from the organic to the processed, raw to semi cooked, from cold cuts to hot breads, the plethora of choices available in all colours, shapes and sizes. Well! Who really buys this food stuff ? The average Indian or the evolved yuppie? How much is bought? Is it part of their daily consumption or restricted to the weekends? Why do they buy them? Is it a fashionable fad or plain sensible buy?

*The National Foods Survey-IV by IMRB is a Convenience Foods Handbook that answers all these questions and more........*


### NFS IV Coverage : At a glance

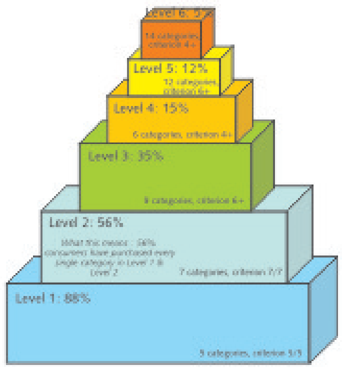
- Comprehensive coverage of 55 food categories ranging from Ready to Cook/Eat ; Instant foods ; Cold Beverages; Condiments; Dairy Products; Desserts; Breads; Health Foods and many more.
- Information on baseline marketing variables like category penetration, frequency of purchase, trial and usage of brands and barriers to adoption of certain food categories
- Exhaustive information on the media, demographic and kitchen related variables to help develop distinctive profiling of the end consumer

The report provided both enlightening and interesting information such as:

- Across categories the incidence of purchase ranged from 2% for products like Muesli to 94% for Noodles.
- Certain brands like Kellogg's, Maggi, Nutrela, Sunfeast Pasta Treat and Frooti virtually defined their categories.
- Local brands like Aavin Curd, Priya Paste and Ganesh Aata managed to hold their own in their respective regions national brands notwithstanding.
- Barriers to trial include lack of knowledge of the product, preference for home-cooked food and high price of product.

### The Food Continuum:

The NFS-IV traces the progression path of the convenience food consumers and categorizes them on six distinct levels based on the incidence of purchase. Commonly bought products such as Salt, Biscuits and packaged snacks were covered in level 1 while evolved products like Mayonnaise, Oats, Pro-Biotic Ice-creams in level 6. The findings revealed that 88% of consumers have purchased every single category in level 1, 55% every category listed in level 1 & level 2 and only 5% of the consumers purchased majority of the categories listed in level 1 through level 6.




As expected, consumers at higher levels of the food pyramid belong to affluent sections and possess better educational qualifications.

### Ready to cook & eat market :

As convenience was the key attribute that warranted inclusion in the study, we reckoned that nothing was more convenient than Ready to Cook foods.

The Ready to cook and eat report covered the following products......

- Heat & Eat foods • Frozen French fries
- Frozen Parathas • Frozen Vegetables
- Frozen Snacks • Frozen Meat

Some snippets from the Ready to Cook eat report:

- The overall incidence of purchase is 34% for heat and eat foods. Bangalore leads this category with a high incidence of purchase with a significant chunk of consumers stating that they use the product when they travel abroad.
- Heat and Eat foods get picked up 5 times a years by consumers in this category.
- About 50-60% buy one pack per shopping trip.
- On an average, consumers have tried around 4 products in the aforementioned categories.
- Each market has its own favourite Brand.
- Not all consumers buy their Heat & Eat Foods from supermarkets.
- Palak Paneer has takers in the South too!
- Frozen Peas is the most popular frozen vegetable.
- Frozen chicken is purchased by 30% of all chicken consuming Households.

Hungry for more information?
write to dolly.jha@imrbint.com

# PRICING RESEARCH

## at IMRB International

Harish Brahmanyapura | harish.br@imrbint.com

Research on pricing has been around for several decades - from the simplest of methodologies such as Gabor-Granger to the more advanced conjoint analysis and customized choice modeling techniques. Pricing research has been typically used to answer simple questions such as "At what price should I launch my product? Does my product deserve a price premium, and if so, by how much?, and so on. It also plays a large role in answering complex marketing questions - What will happen to sales volumes of our existing product portfolio when we (or a competitor) introduce a new stock-keeping unit (SKU), or launch a new pack, or rationalize our portfolio by cutting an SKU?.

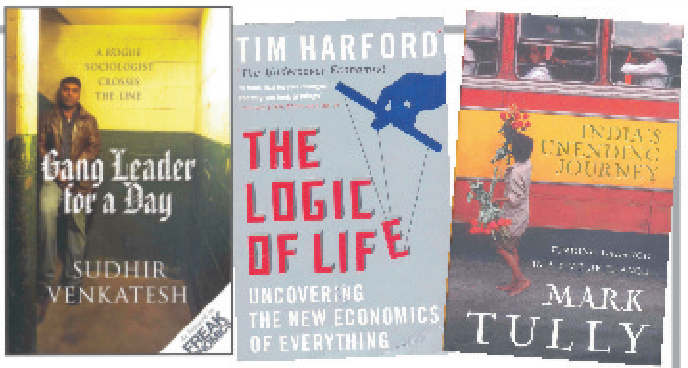
IMRB MODELS

How can the effect of distribution be factored in when assessing the impact of new launches? How does distribution, in turn get affected by new launches? In most categories, an across-the-board price change could have a significant impact on category size. Similarly, there could be consequences on category volumes if there is a price change for a key SKU, or the addition of new SKU or when trimming a product line.

IMRB International has developed several simple-to-execute innovative solutions in the area of pricing research that address these key questions. One such innovation is to measure and incorporate the impact of an individual's preferences on decisions at the store level. This improves upon the traditional factoring at distribution levels, which we believe is too rudimentary. Yet another innovation enables the incorporation of size effect of the category on pricing research. Here, we recommend the linking of conjoint utilities with observed category shifts - in experimental work, or via historical analysis. This enables us to make predictions for virtually any query. One final innovation centers around how most pricing research is traditionally done – by exposing respondents to the prices of different product(s) ideas they are made to choose, rate or rank. However, this does not replicate the traditional kirana shopping experience. The result of heightened awareness can result in artificially sensitizing consumers, and may actually inflate levels of switch-outs. Our innovation in this area involves a combination of simulated purchase-cum-Choice Based Conjoint analysis procedure that provides a more realistic prediction of switch-in and switch-out levels in the Indian context.

Books Reviewed by: Mohan Krishnan

# what to READ




### Gang Leader for a Day
Sudhir Venkatesh

Those of us who have read the hugely popular book "Freakonomics" would have been stunned to be introduced to an Indian connection in the unfamiliar setting of Chicago drug mafia ring. Sudhir Venkatesh is the intrepid sociologist who spent many years living with gangsters peddling drugs in Chicago's south side ghettos. What starts as a foolhardy endeavor culminates in an empathetic and revealing account of the little know lives of drug lords. At one level, we can appreciate the coal business logic that drives drug peddling whose problems are not very different from the pressures that drive a modern day business corporation. At another level, the book brings to life the people side of this operation and reveals society's own responsibility in finding a solution. It is here, we in the corporate world have several lessons to learn from. A deeper introspection will surely allow us in the corporate world to reevaluate the way we treat our people and how our practices are a reflection of the ills of the society in which we live in.

### The Logic of Life
Tim Harford

When Economists start writing readable books, it is time we in the business world learn to clean up own jargon filled lives. This is an unputdownable book whose central premise is that we should not throw out economics just because it assumes rational behaviour to explain every human endeavour. Tim Hartford applies these principles in human behavioural areas which are traditionally considered outside the ambit of "rational" scrutiny. He grapples with issues as diverse as "proliferation of sex trade and problems of checking AIDS proliferation", "rationale behind growing divorce levels and its importance in engendering woman equality", "executive pay and the rationality of its excesses", "urbanization and rationality of large cities growing larger" and "ghettoisation of localities despite every efforts to homogenize". The book is a lucid and an impassioned plea to heed the rational voice while not necessarily discounting the effects of emotion and irrationality in human behaviour.

### India's Unending Journey
Mark Tully

This book reveals a mellowed Mark Tully who marks his 71st birthday at Varanasi, a city he considers to provide the balance exemplified in its tolerance and warmth towards many religions. The book grapples with the problems faced by the material West and its dominant religion of Christianity both of which speak of certainties. Mark Tully contends this to be the central problem of West which he juxtaposes against the lessons he learnt from India that refrain him from moving from one certainty to another. He calls this the "uncertainty of certainty." It is a timely book especially for us in India who wonder if we are aping the West for the wrong reasons and throwing out all that is good within Eastern societies. Of course, the book does not stop at taking punches at moral problems that face our country and how we can learn a thing or two from the West as well. A timely book that carries forward the dialogue on the issues surrounding the globalising world

■■■

# ask the expert

**We want to undertake a segmentation exercise to map the market and decide on our launch plan. Do you have any advice on how best to approach this market research problem?**

Market segmentation is probably one of the toughest problems a market researcher would face in his career. There are two reasons that make it tough and one of this can be solved easily if the marketer who needs market segmentation does his homework well enough. Some of the questions the marketer needs to ask himself or herself are:

1. Am I dissatisfied with the existing segmentation as is obvious in the market place? If so, what can be the other ways to segment the market?
   a. In most product categories, it is price-functionality continuum that segments the market (low end, medium, top end etc.) This may work fine for most categories unless one thinks that the tipping point is around the corner.
   b. One can develop working hypothesis on why some of the segmentation practices (found elsewhere in the world for a given category) may or may not work in the country.
2. What are the reasons that are motivating me to undertake segmentation?
   a. Am I planning to develop products to meet different needs? If so, do I have some working hypothesis of what needs the different products will cater to?
   b. Am I planning to communicate to sub-segments? If so, do I have some working hypothesis about distinct communication channels for these sub-segments?
   c. Am I planning to develop distinct sales channel or customer servicing mechanism? If so, do I have a sales/service plan in place to cater to different sub-segments I can hypothesize?

More often than not, marketers are not able to answer these questions and therein lies the biggest problem in developing good market segmentation. In fact, many believe in the textbook like process where market segmentation is the starting point (unfortunately, Philip Kotler's chapter on Segmentation, Targeting and Positioning is probably the most misunderstood). Many marketers believe that the market segments already exist in the market place and it is for the researcher to identify distinctive clusters so that they can choose lucrative segments before developing distinctive positioning platforms for their products. In the traditional U&A (Usage & Attitude studies) this was dealt in a roundabout manner. Various questions were asked including usage, occasions, benefits sought from category, attitude, lifestyle – activities, interests and opinions about critical aspects of life that impinge on product category etc. Marketers and market researcher spent several iterations mulling over the vast database mining it until some working hypothesis was developed to segment the market. Applying this blindly in new and evolving categories is bound to be risky. In the face of pressure, a market researcher generates a battery of attitudinal statements which describes the category (on price, features, attitude to category etc.) to which the respondent agrees or disagrees based on which cluster analysis is undertaken to develop segments. Since cluster analysis techniques are not statistically rigorous methods, the researcher has to specify the distinctive segments that exist in the market basis some working hypothesis. Without ideological support from the client, a researcher makes some assumptions to arrive at market segments. Too often, this is usually followed by segment naming that evokes some attributes of the segment. Unfortunately, at this stage, the marketer realizes that he is unable to use the segmentation results in any fruitful way by which time it is too late to redeem the study in anyway.

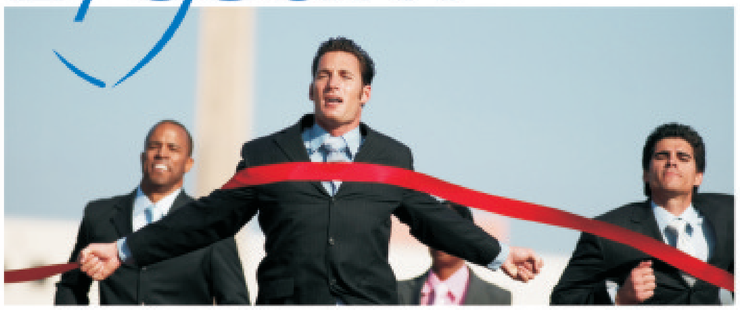
*One solution to mitigate this problem is to conduct qualitative research to develop working hypothesis so that marketers can answer basic questions on why they need market segmentation.*

*Write to our panel of experts with your queries at imprint@imrbint.com*

IMRB international IMPRINT

Sridevi Rao | sridevi.rao@imrbint.com

# THE ALL NEW Lyceum



**Last year, IMRB International witnessed significant internal changes.**

Issues like higher compensation in the external world, ennui with repetitive work and therefore a yearning for something "more exciting and different", a visible career path and reward for superlative performance, and their learning and growth were becoming key reasons for moving on to assignments on the client side or to agencies overseas. Meanwhile, on the client side, there were constant rumblings for "more value" from research, for researchers to become "partners" in their businesses. Clearly, we had to change ourselves to meet these challenges.

## Restructuring to deliver more "value" to our clients

The first big change was to evaluate whether our current structure was designed to deliver value to our clients. This exercise resulted in collapsing a 13 level hierarchy with many designations but undifferentiated roles to a flatter and a path breaking four level structure. Multiple designations denoting tenure were discontinued. The emphases moved from designation to the actual value add in the role. New designations were chosen to reflect that "value".

1. **Research Manager** mandated with managing project delivery on time and quality

2. **Insights Director** mandated with adding value to data through superior understanding of research and a clear understanding of client priorities.

3. **Group Business Director** mandated with managing business growth for his / her group, managing key client relationships, ensuring employee satisfaction and retention and designing processes to improve efficiencies for their group and building capability within the team.

4. **Unit Heads** mandated with P&L responsibilities for their Units, strategizing growth in new sectors, driving development in product, processes and people management and mana

## "Living" the new structure

To help everyone in IMRB "live" their roles and perform according to expectations, IMRB moved towards a brand new performance appraisal system designed to ensure that every role holder's performance was evaluated and rewarded on the key activities for that role. In order to keep the momentum and ensure timely corrective action, IMRB moved from an annual performance appraisal system to a quarterly one.

An important change has been the decision to make merit and capability the basis for all promotion decisions. This has also meant that promotions are no more tenure based. Everyone has realized the only way out is to work hard and deliver targeted results.

## 2008 focus: Developing capability to deliver value

The next challenge now is to "build capability". We need to give training and developmental inputs to help the staff "adopt" their new responsibilities making this the focus for 2008.

The first step towards this was taken in 2007 with the revamping of LYCEUM, our 20 year old entry level induction program. 2007 saw this institution being fully re-furbished from a 2 week, fully residential program into a month long class room based training on basic MR concepts and operations. This is followed by a Unit-specific boot camp where models and techniques related to that Unit are taught in class room sessions. The duration of these sessions varied from one week to four weeks.

IMRB will repeat this training for all existing RMs as a refresher course tailor made to their 2-3 years of actual experience in MR. The performance in these sessions is going to be a determinant in the promotion decision for the next level, i.e. the Insights Director. The Insights Directors themselves will undergo training and assessment on advanced technical skills.

In addition, IMRB is investing strongly in the development of soft skills in people management, leadership, client leadership and business leadership. All training is conducted in a systematic manner based on an understanding of the competencies required to run our business.

It's a long road, the benefits are not immediately visible, but there is no turning back!

## MR AGENCY OF THE YEAR


*For the second consecutive year!*

innovation @ work

Sugandha Mangalick | sugandha.mangalick@imrbint.com

# IMRB International takes technology leap in Market Research

Gone are the days of conducting market research on pen and paper. Now a technology intervention has taken place in the way research is conducted using CAPI – Computer Aided Personal Interviewing enabling us to Capture data an Laptops and Palmtops.

IMRB International is amongst the first few in the country to initiate this quantum leap for conducting studies like continuous brand tracking, attitudinal studies (Segmentation), Ad Evaluation, trade studies involving elite retailers etc.

The methodology followed is simple. A customized & user-friendly software is developed to conduct surveys and trained interviewers are provided Laptops / Palmtops for collecting data for the survey (house to house or central location). The collected data can be made accessible for viewing at the client end within a day of fieldwork.

This leap has enabled a much faster turn-around – taking only 2/3 of normal pen-paper time or even lesser in some studies,

- It has also simplified the entire interviewing process by chipping in the logical checks in the software to give 100% logical and error free data.
- Visual stimuli is incorporated - No longer do we show ads on a printed paper – we simply play it to respondents!
- An inherent and increasing problem with conducting market research surveys is getting respondents! This survey methodology promises a much higher hit-rate.
- With growing average incomes, comfort with technology – a good proportion of consumers have become "Premium" creating a huge market segment. Marketers often want to understand their life styles and habits, however, these consumers were always 'unreachable for market research companies. CAPI assures these premium consumers efficiency of their "valuable time".

Retail majors ITC, Kelloggs, DTC have already started using CAPI research leveraging faster turn around time with 100% logical and error free data for their research assignments to IMRB.

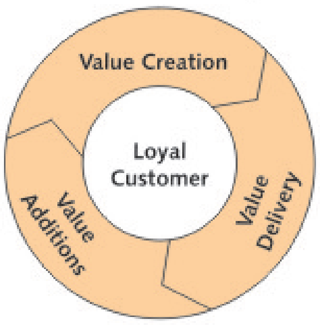
Going CAPI is the future of market research – a fundamental change that is taking place right in front of our eyes.

# Aligning Promise and Delivery

Ajit Rao | ajit.rao@imrbint.com

There is a problem in the way most customer satisfaction surveys are conducted today. Typically the first step - one would try and find out all the points of interaction that a customer has with the service provider and then develop a questionnaire. This questionnaire is then administered to a large sample of customers to find how customers would rate the "experiences" at each of the touch points on a five or ten point scale. The result of such an approach – the questionnaires of all the service providers (within an industry) begin to look very similar. While this does help organizations to a certain extent, there is perhaps a better and a more strategic way to look at Customer Satisfaction surveys.

Every organization exists because it creates some value for its customers/ consumers. While it is important to identify what value the organization will offer its customers, it is equally important to deliver those values – effectively and efficiently – to the customers. Further, the organization has to constantly add value to customers either by creating new values or by improving the delivery of those values. When an organization manages this "value circle" well, then there will be an increasing base of Loyal customers. In effect, more revenues and profits for the organization. This is illustrated in the figure below:




Let us apply this concept to the hotel industry. What value does a 5 -star hotel create for its customers and compare it with say a budget hotel? Let's assume the values they create are as in the table below:

| Value Promise | |
|---|---|
| **5 STAR HOTEL** | **BUDGET HOTEL** |
| Luxury / Opulence | Clean & Hygenic |
| Range of Facilities | Functional facilities |
| Personal Service | Convenience |
| Security | Price |

Now let us look at the "moments of truth" or the "points of interaction" that a customer has within any hotel. These would be check-in, room/bathroom, lobby, laundry, in-room service, restaurants etc. These are the vehicles to deliver the "values" that the hotel wants to create for its customers.


The challenge for each of the hotel would be to "Align" the values/promise to each of these moments of truth. To illustrate - The room of the 5-star hotel would need to be large, spacious, filled with modern equipments (fax machine, LCD TV – with a wide range of channels, well stocked bar, automatic a/c controls, internet connection, printer etc), high quality and luxurious looking beds, a sofa, writing table and chair, wall to wall carpets paintings etc. However, the room of the budget hotel would be of moderate size with functional equipments such as phone, a table and chair, a simple bed.

This "Alignment" needs to be effectively captured in the customer satisfaction questionnaire. For example instead of a standard "How would you rate the quality of your room", the 5- star hotel could ask something on the lines of "How would you rate the luxuriousness of your room". The budget hotel could ask "How would you rate the functionality of your room *"The key idea is that every customer satisfaction study must design a questionnaire that effectively captures how well the value created for customers (or the promise made) is being delivered to customers. In effect, how aligned is the organization to the promises that it makes to its customers?*

In order to develop such a questionnaire, the organization could create a "Promise/Process" Matrix. This is a matrix that maps the values that the organization wants to create for its customers with each of the moments of truth. The table below illustrates such a matrix for a 5 – star

| | Luxury | Wide range of facilities | Personalized Service | Security |
|---|---|---|---|---|
| Check-In | | | | |
| Lobby | | | | |
| Room | | | | |
| Bathroom | | | | |
| In Room Dining | | | | |
| Laundry | | | | |
| Coffee shops | | | | |
| Restaurants | | | | |
| House Keeping | | | | |
| Check out | | | | |

hotel. Each of the cells need to be filled.

Consider the Room/ Luxury cell. The hotel can ask the customer questions relating to the luxurious size of the room, if the décor/ambience was luxurious enough and so on. In the room/ range of facilities cell, the hotel can ask if customers were happy with the range of equipment/facilities available in the room. All other cells can similarly be completed with attributes that customers should rate the hotel on. It is possible that there could be more than one attribute in any cell. It is also possible that some cells such as the Check-in/ Luxury, may have no entry.

Once the Promise/Process grid is complete, the hotel will have a questionnaire that is unique and relevant to it. The questionnaire of the 5 – star hotel will be very different from that of the budget hotel. More importantly, the questionnaire becomes more actionable too - Look at a traditional question "How would you rate the overall décor/ambience of the room". If customer ratings on this attribute were low - how should the hotel interpret this? What action should it take? On the other hand, if the hotel asks "Would you say the décor/ ambience was luxurious – please rate" then low scores are more easily interpreted and therefore lends itself to better actionability. Even if the hotel's scores are high such a system can help maintain or improve. For example look at room and luxury. If the scores are high, the relevant managers can focus their thoughts on how can we make it more luxurious? And thus reinforce the "luxury" perceptions of the hotel amongst its guests.

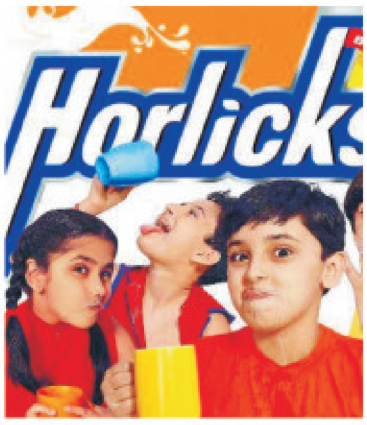
For information regarding this newsletter, email to
**imprint@imrbint.com**
or
**call on +91 22 24233526**

Puneet Avasthi | puneet.avasthi@imrbint.com;

# Assessing ROI & Scenario Building

The Health Food Drinks (HFD) category comprising brands such as Horlicks, Bournvita and Complan has been a integral part of the nutritional plan of mothers for their children in many households over generations now. The brands in the category derive their success through appropriate communication and schemes that sustain the relevance of the category for the Mother (the key gate-keeper) and attractiveness of the brand for the Kid. It is thus the role of consumer promotions in this category cannot be over-stated. Added to this is the fact that close to two-thirds of the HFD buyers buy the category between 1 to 3 times in a year contributing to only close to a quarter of the category volumes as per MarketPulse – IMRB's Household Purchase Panel. This situation makes bribing the consumer to purchase or to influence purchase appealing to the key players in this category.


However, questions such as how should one assess the impact a promotion on the targeted franchise and the likely source of business have not been well answered so far. Advances in computing




technology and data-mining allow us to answer questions such as these.

To address issues such as these IMRB and Meritus have developed Configur +. Configur+ is a unique model based on a class of mathematical techniques called the Time to Event analysis. This approach is similar to the ones used by the insurance industry to estimate "risk". From marketing analysis stand-point we treated the event of purchase to be an equivalent 'Risk' in the case of insurance. Time to event analysis allows users to dynamically create scenario's for the brand in terms of consumer response to activities and likely source of business. Additionally, the model allows us to also factor competitive response and its likely impact on the efficacy of our interventions. Configur+ works on Consumer Panel data with atleast 15 past data-points per panel member to map their individual buying behaviour and response to activities.


The model has been tested on the Health Food Drinks (HFDs) category in Tamil Nadu using MarketPulse – IMRBs Household Purchase Panel (n=75,000). Tamil Nadu is the largest HFD market in India.

The model gave some interesting insights on consumer buying behavior in the HFD category. The model indicates that in a mature HFD market like Tamil Nadu marketing interventions have negligible impact on category buying. A shopping trip to buy the category is completely habit driven. However, brand buying within a shopping trip is dynamically impacted by marketing interventions. Only 53% of brand purchases could be explained by habit alone. This was even lower for Bournvita at 47% of brand purchases that could be predicted by habit alone. However, after including consumer promotions in the model, the prediction went up to 72% for Bournvita. This indicates high dependence of the brand on consumer promotions to maintain its business in Tamil Nadu. On the other hand, the impact of consumer promotions on Horlicks (the market leader) is marginal with only a 6% improvement in prediction. Clearly, Horlicks buying in Tamil Nadu is much more habit driven as compared to a challenger like Bournvita which seems to be driving its growth in Tamil Nadu through Consumer promotion offers.

Sunil Bakshi | sunil.bakshi@imrbint.com;


KEMA
CERTIFICATE
"ABACUS MARKET ANALYTICS: A SPECIALIST UNIT OF IMRB INTERNATIONAL"
ISO 9001:2000

## SIX SIGMA ISO

We are delighted to inform you that Abacus market analytics international units in Mumbai and Pune have been recommended for ISO 9001:2000 certification by senior auditors of KEMA, Netherlands. With this, all Abacus international units are ISO certified (Bangalore unit got certified in February last year).

# Happenings

IMRB International organized its Client's meet with the theme "Consumer Portrait of 21st Century Indian Consumer–Answers to Your Burning Marketing Issues" on 23rd & 24th January 2008. The conference was attended by marketing professionals across various business verticals.

We would like to thank all our clients who graced the occasion and helped us understand their business needs and their expectations from the MR industry.


The panelists with Thomas

Mr. Pranesh Misra,
Global Director Marketing Accountability,
Lowe Worldwide

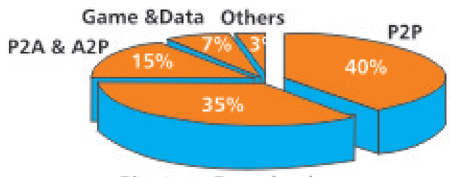
Mr. Sujit Ganguli, SVP & Head Marketing,
ICICI Prudential Life Insurance

In discussion- On burning issues of clients.

Poster Presentation by
one of the budding researchers

# information update


In a recent research conducted by eTech Group, a specialist unit of IMRB international, the Mobile VAS industry in India was estimated to touch 46 billions at the end of 2007 growing by 60% over previous year.

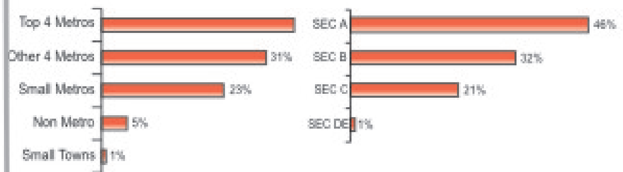



Source: eTech Group Research

## Who is the Indian gamer?

As per I-Cube 2007, there are about 2.8 Million online gamers in India and about 75% of these gamers are males. I-Cube is one of the most extensive research undertaken amongst the Internet users in the country and covers about 65,000 individuals across 20 cities of the country.

Again about 72% gamers are from higher two affluence stratas (SEC A and B) and almost 80% of the gamers are from the Top 8 Metros–Delhi, Mumbai, Chennai, Kolkata, Bangalore, Hyderabad, Pune and Ahmedabad. Interestingly, 94% of the gamers are from the metros, with the small towns accounting for only 6% of the gamer community.




Base: 30 Cities, Online Gamers : 2.8 Mn

First MAIT-GTZ study by IMRB International reveals extent of e-waste challenge in India :

- India generated 330,000 tonnes of e-waste in 2007
- E-waste expected to touch 470,000 tonnes by 2011
- Dumping from developed countries and informal recycling adding to environmental degradation
- Inclusive eco-friendly recycling is need of the hour

# client talk

*In Conversation with*

## Subroto Chattopadhyay

President CEO- Entertainment Sector, RPG Enterprises

My association with IMRB International goes way back to 1982 when I started my stint in ITC 26 years ago.

ITC can take credit for being one of the pioneers of market research in India and indeed one of IMRB's oldest clients. Mr Ajit Haksar the legendary Chairman of ITC was instrumental in forging this relationship. Along with HLL, ITC used research before it became the norm. MR as it was called became a part of regular standard operating practice and a tool for taking decisions.

My friends like Sudipto Sinha and Joshojit introduced me to the world and benefits of research. They taught me how to write briefs introduced me to the benefits of different models and indeed taught me skills to interpret the findings. As I got into new businesses IMRB provided information to build business models and plans.

Later in Pepsico I realized that the work done in India by IMRB compared rather well with what happens in Europe and USA.

My preference for IMRB is also due to the quality of people who I worked with. There was always a high standard on ethics, transparency and independent position based on information. It is a consultancy firm that is built to last.

*In Conversation with*

## Thiru Thirumalai-Anandanpillai

Microsoft R&D India Pvt Ltd

My association with IMRB representing Microsoft has been around 8 months. We approached IMRB through couple of market agencies which helped us to do some customer segmentation & customer understanding about increasing computer penetration in India.

We worked with the team that was led by Bishwapriya Bhattacharya from the eTech Group. It was wonderful experience working with them.

IMRBites are experts in the domain with their methodologies and they have fulfilled our expectations as market researchers. They were pleasure to deal with their timely delivery.

Market Research Companies have an edge as they are able to develop deep domain expertise being in constant touch with consumers and their regular interactions with people in the domain. This has helped MR agencies like IMRB to not just give us in-depth insights in market research but act as consultant to us. They are able to not only guide us through standard market research techniques but also help us in terms of new concepts or consumer trends which we could miss out on.

# IMRB IN NEWS