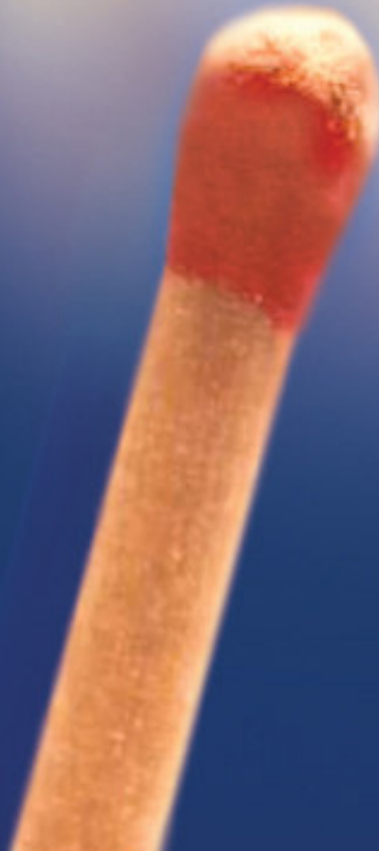


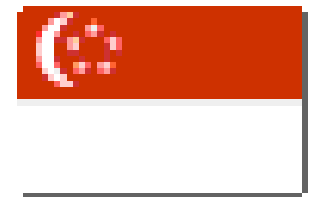
Synovate Hotspots Singapore



lifetolife



Bringing
Singapore
to life



Bringing Singapore to life

- This document is designed to give you an overview of Singapore, its people and some of the key issues and trends Synovate is observing.
- The core source of information is ‘LifeWorlds’ (Synovate’s ethnographic approach) supplemented by Synovate’s broader understanding of this country’s culture.
- Our discussion has two main parts:
 - “Big Ideas”: insights into Singaporean culture and consumers
 - Implications for research



synovate

Research reinvented

Some numbers

- Total Population : 4.6 million, densely populated for its size, often referred to as the 'red dot' on the global map!
- Singapore is proud to describe itself as an Immigrant nation - our very own melting pot in East
 - almost 25% of the population comprises expats who are not local Singaporeans. This makes the environment very dynamic and international while still being rooted in culture
- Ethnic mix
 - 76% Chinese
 - 13.7% Malays
 - 8.4% Indians
 - 1.8% Others
- Religion
 - Singapore is home to a diverse mix of religions including Buddhism, Islam, Christianity, Taoism and Hinduism
- Age profile
 - 0-14 years: 20%
 - 15-64 years: 72%
 - 65 years and over: 8%
- Multi lingual society
 - English as the official language
 - Chinese (Mandarin), Malay (national language) and Tamil
- Literacy rate:
 - High literacy with 95% literacy ratio



Sources: Singapore Facts and Figures, Economic Development Board

Some salient brands in Singapore

NOKIA
Connecting People



CLARINS
PARIS

 StarHub

NETS
make life great




**SINGAPORE
AIRLINES**

 **SingTel**
asia's leading communications company

The background is a solid teal color. On the left side, there are several abstract, overlapping shapes in a lighter shade of teal. These shapes include a large, curved form that resembles a stylized letter 'P' or a similar character, and a smaller circle below it. The overall aesthetic is modern and minimalist.

Section I: Big Ideas

Bringing Singapore to life: “Big Ideas”

Insights into Singaporean culture and consumers

- **Close Quarters:** Limited living space has implications for how Singaporean lead their daily lives and means that factors like convenience and organization are extremely important to consumers.
- **Eat, Drink, and SHOP:** Singapore is a small country with limited leisure / entertainment options – in this environment, shopping, eating out, and general consumerism take on bigger dimensions that in most other countries
- **More than Multi-Cultural:** Over time the four major ethnic groups in Singapore (Malay, Chinese, Indian, and British) have created a uniquely Singaporean take on food, architecture, and art.
- **Government is God:** Singapore is highly regimented, and its citizens implicitly trust their government on matters from the economy to the cleanliness of its streets.
- **Economics and Entrepreneurship:** More than a nation of immigrants, Singapore is a nation of hard-working entrepreneurs focused on doing whatever is good for business.

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Big Idea: Close quarters

Crowded residential spaces creates specific consumer needs...

The Need for Convenience

The Need to be Organized

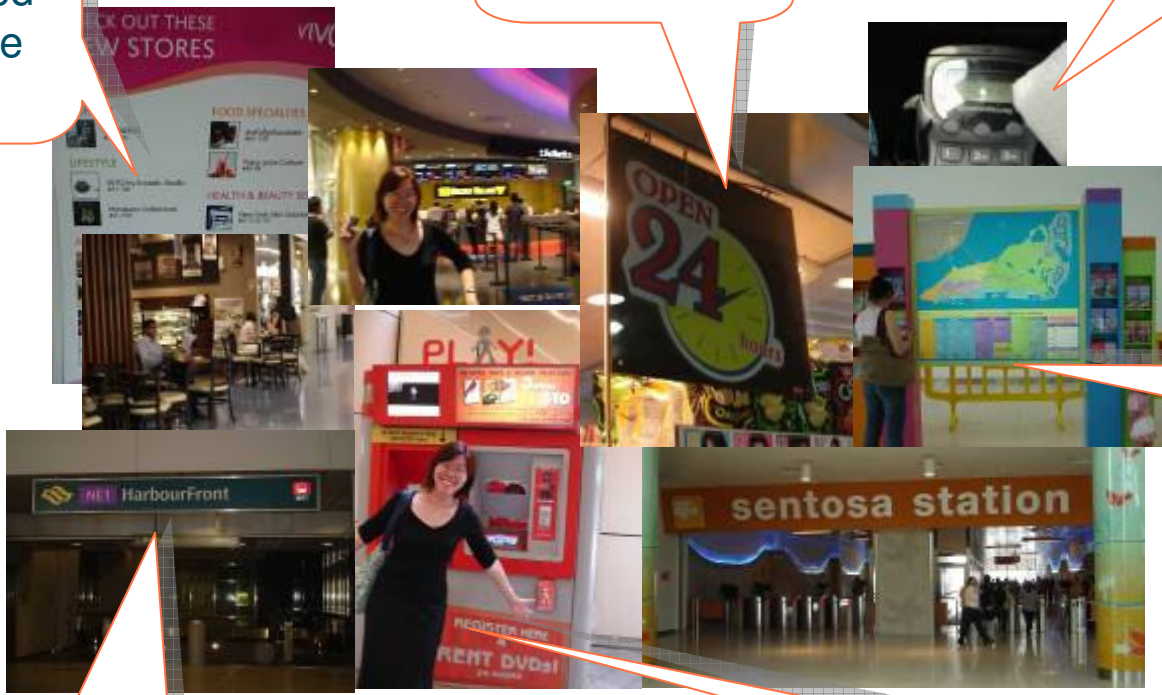
The Need for Space



The Need for the Best Deal

The need for convenience

Merchandize categorized by lifestyle drivers!



24 / 7

Pay anything anywhere by NETS – even taxis

Neat navigational maps everywhere

What is Singapore without the Qs

Drop your DVDs or rent news ones – rental kiosks at malls

The need for space

Keeping a safe distance



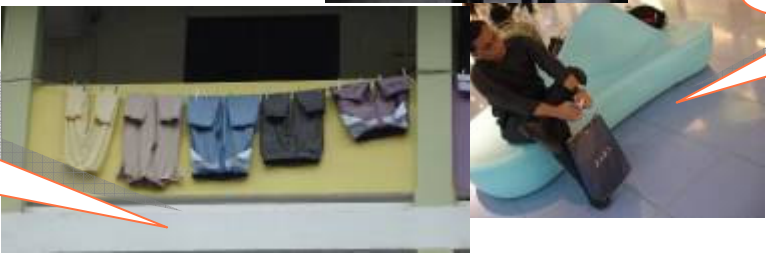
Crowded places always make the Singaporean grumpy



In spite of or rather because of being one of the most densely populated countries, there is a need to maintain spatial boundaries and define personal spaces

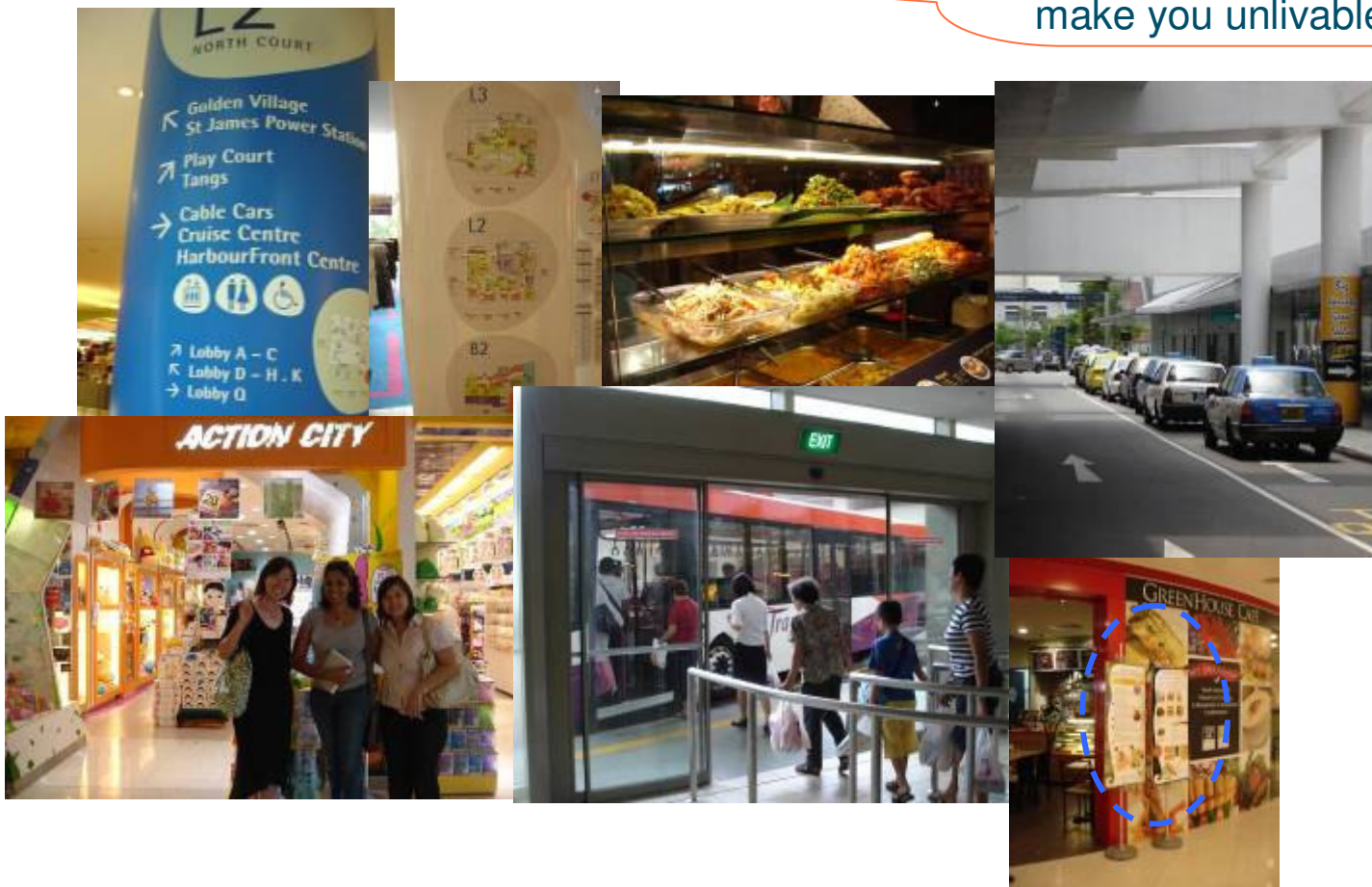
Shopping bags come in handy to stake your personal space

Making the most of my limited space



The need to be organized

Neatly organized maps, food options, menus, merchandize ...
taxis – order and method everywhere. Living in Singapore can make you unlivable elsewhere!



The need for the best value



Nobody buys anything at 100% price!



Slice of Singaporean life in MRT – Where you can see mainstream lifestyle in action!



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Big Idea: Eat, drink, and SHOP – 24/7!



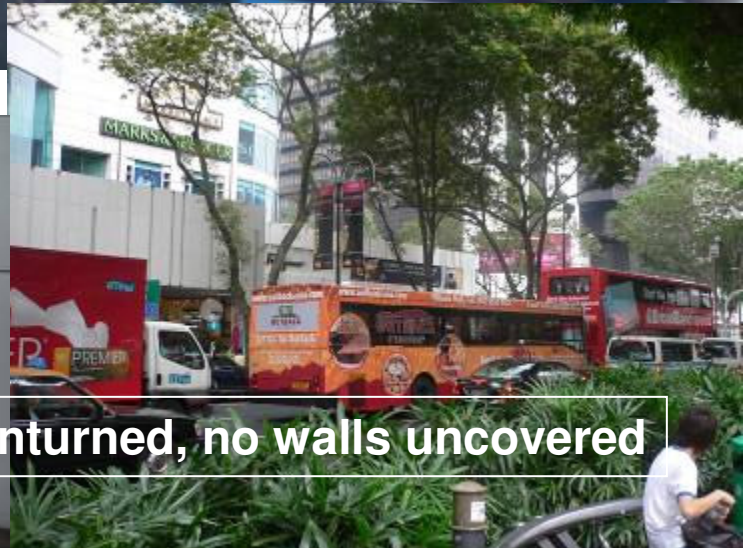
Increasingly demanding and impulsive consumers

Brands: All-powerful and omnipresent



Every possible surface is used to advertise to brand conscious Singaporeans!

Consumerism as leisure fuels intense marketing



Need constant innovation... leave no stones unturned, no walls uncovered

Bringing Singapore to life: “Big Ideas”

Insights into Singaporean culture and consumers

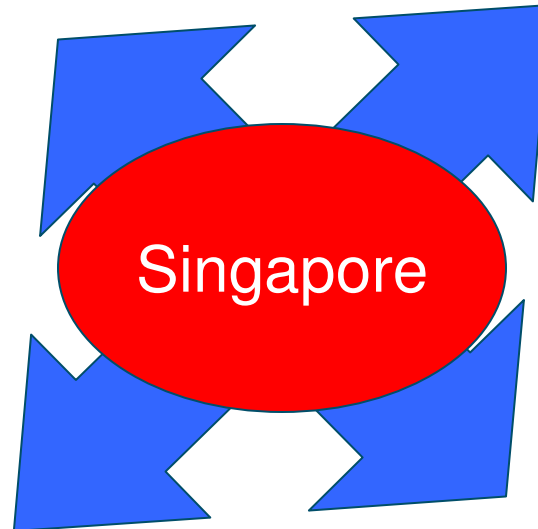
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Big Idea: More than multi-cultural Four major cultural influences...



Chinese

Indian



Malay

British



...Have combined to make something uniquely Singaporean

- Singaporean consumers have unique and characteristic preferences that have been shaped by Singapore's mix of Western and Asian cultures. Key examples:
 - Food
 - Arts/ Entertainment/Leisure
 - Design

Singaporean food: Immeasurable variety at cheap prices and excellent quality – All uniquely Singaporean



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Research reinvented



Peranakan Food – which is a unique mix
of Malay and local influences – not
found anywhere else!



Chilli Crab – the signature
Singaporean dish

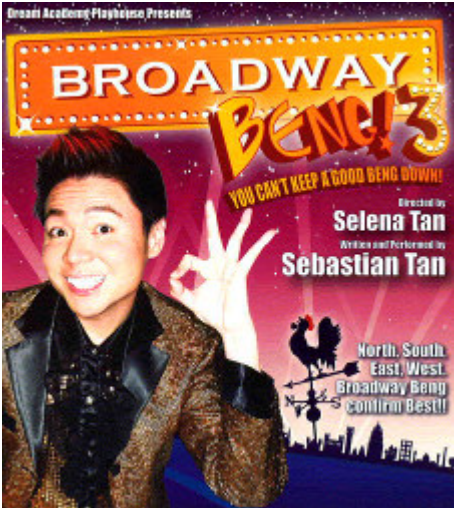


Indian Rojak – nobody in India would
know about this!



Hainanese Chicken Rice – found not in
Hainan but only Singapore

Singaporean arts and entertainment: A special Singaporean sensibility



Local humor which laughs at the Singaporean values – which binds all diverse Singaporeans into a common national identity



Gambling which began with immigrants hoping to win enough to go back home and has stayed as a sort of obsession



The Singapore Symphonic Orchestra



Singaporean architecture: Modern yet rooted in culture – All cultures

Singapore's answer to Star Bucks – 100% Singaporean coffee shop – Ya Kun



HDB – the local housing clusters with ethnic quotas



Traditional Chinese house

The ubiquitous Durian fruit which you can smell several miles away – inspiration for the Esplanade



Impact of tourism: Increasing Western cultural influences



Tourist based products and services all set to grow!!

Large number of expats adds further to multicultural landscape



Marketers will increasingly cater to a multi cultural audience

Western / foreign food craze



Open to influences from outside
Also permeates language, fashion, lifestyles

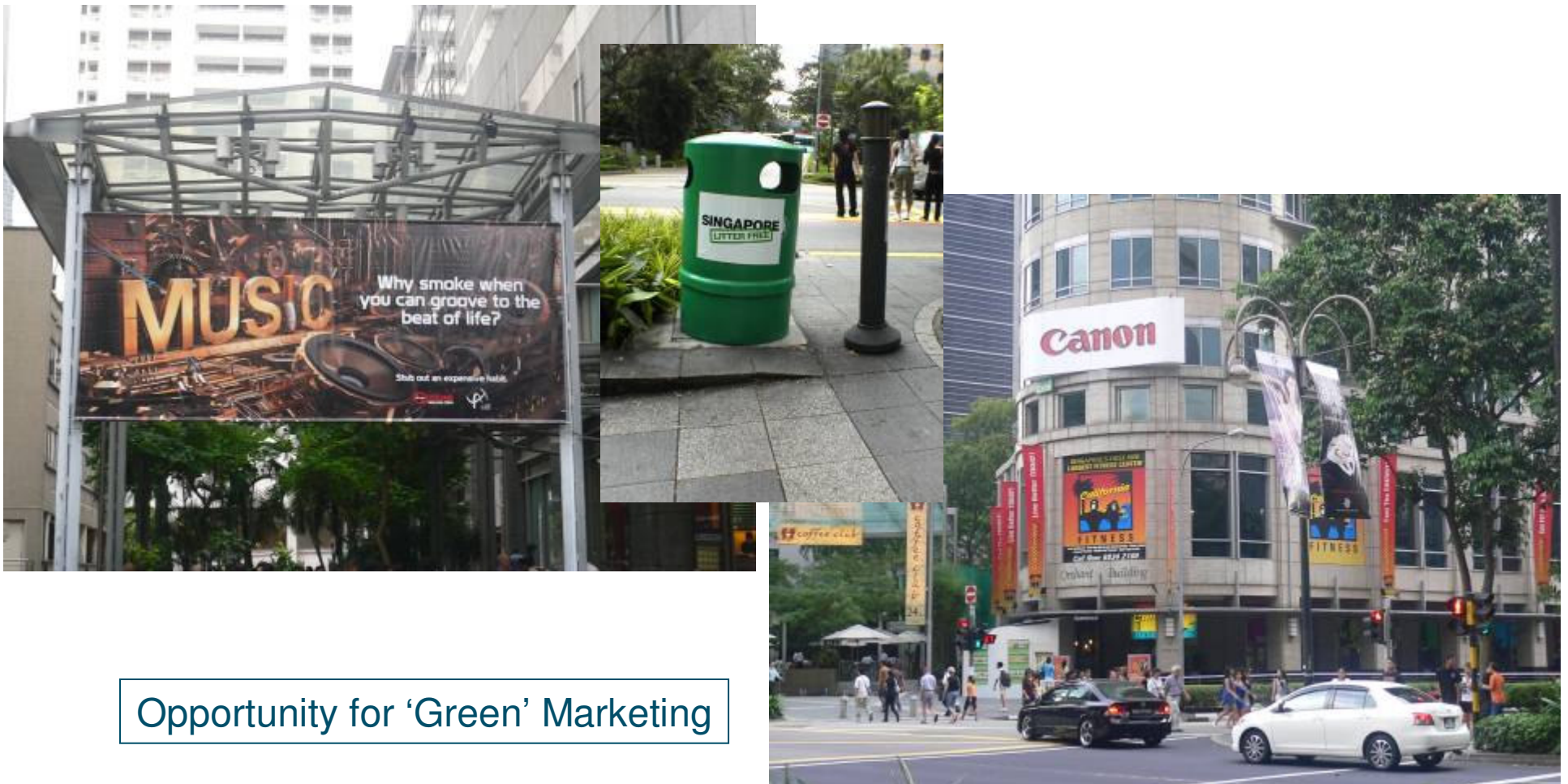
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Big Idea: Government is God

- Singapore is famous for its strict laws as well as its strictly law-abiding culture
- This “law and order” society is maintained not so much by fear of punishment but by a deep trust in government and comfort with authority.
- Singapore embraces “mandated” solutions to problems from the economic to the social

Clean and green: Cleanliness has always been a preoccupation, “Green” is the latest government sanctioned goal



Opportunity for ‘Green’ Marketing

Bringing Singapore to life: “Big Ideas”

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Big Idea: Economics and entrepreneurs

- Singapore is a financial and commercial hub for South east Asia – enjoying considerable influence in the region and beyond
- The economy has been largely stable, with one of the lowest unemployment rates in the world and a well stabilized inflation rate (often under 3%)
- The economy is run by the government along corporate best practices where entrepreneurship and profit is rewarded; Singapore is also one of the lowest taxing nations with average income tax in the region of 15%
 - On the flip side, it also encourages people to work for as long as they can with few medical or welfare sops
- Singapore's culture is deeply influenced by its immigrant / entrepreneurial background:
 - Tremendous work ethic and task-focus in all aspects of life
 - Focus on money and making pragmatic decisions (“whatever is best for business / the pocketbook”)

A large, stylized number '2' in a light blue color is positioned on the left side of the slide. It is composed of several overlapping, semi-transparent shapes that create a sense of depth and movement. The background is a solid dark blue color.

Section II: Implications for research

Implications for qualitative research in Singapore

1. Ethnicity matters – specify ethnic composition and mix
2. Singapore is a highly wired city-nation. Technology can provide many options
3. We have seen how important structure, order and precision is! When you say 7.02 a.m., be there at 6.59 a.m. at least.
4. And we don't need to over recruit too much either – mostly when people say yes they mean yes
5. Personal space is important – making the average Singaporean therefore let their hair down and reveal their innermost secrets will be a challenge – invest in good warm up techniques
6. It is culture dominated by the immigrant survival spirit – give them a task and Singaporeans will work very hard to excel. That is why groups tasks like collages or making-your-own-ad works so well here
7. Money is important – often the most important thing. Anything is possible with the right incentive
8. The average Singaporean is highly consumerized, deals oriented and into maximizing his/her dollar! Loyalty and emotional brand connect all takes on a new meaning here – and will be a challenge to the best qualitative researcher

Bringing lifetolife



Thank you