

ASIA'S MARKET RESEARCH
AND CONSUMER INSIGHTS

M E D I A

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The Asia Research
**ANNUAL
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THE MARKETING
**BLIND
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NEWS In Case You Missed It

PURESPECTRUM NAMED MARKETING RESEARCH SUPPLIER OF THE YEAR

At the 2021 Marketing Research and Insight Excellence Awards, PureSpectrum was announced as the winner of the Marketing Research Supplier of the Year award. One of the judges commented: "The core of strong consumer insights is sample integrity. PureSpectrum's system takes sample integrity and quality to the next level."

PureSpectrum was built on the ethos of making researchers' jobs easier. According to PureSpectrum: "Our customers are always at the forefront of our minds as we continue to push the industry's data quality standards forward. As the newly named Supplier of the Year, we look forward to introducing the PureSpectrum platform to more industries, thus enabling research to make life easier for everyone."

In 2020, PureSpectrum was named one of the top three suppliers and they are thrilled to receive this year's recognition. They applaud their fellow nominees and all the rest of this year's winners. They also thank Quirk's Media and the Marketing Research and Insight Excellence Awards judges for the auspicious recognition.

Web: www.purespectrum.com

FIFTY-FIVE LAUNCHES NEW OFFICE IN SINGAPORE

Data and analytics consultancy fifty-five has expanded in Southeast Asia with the opening of a new office in Singapore. They have hired Ben Poole as the market's Head of Office. Poole will be tasked with leading fifty-five's operations and growth in the Southeast Asian region as the consultancy looks to expand its regional footprint once again. He will also be responsible for establishing fifty-five as the go-to partner, as well as adapting fifty-five's portfolio of services to local markets, in collaboration with the company's global expertise and innovation team.

Poole brings with him two decades of digital marketing experience. He was formerly in IPG, where he successfully grew the agency's performance marketing agency in Asia as MD, APAC at Reprise.

"I am looking forward to tapping into fifty-five's global expertise and experience to help our global clients and new prospects in the region," Poole said.

Web: www.fifty-five.com

MRS AND JMRA FORM PARTNERSHIP

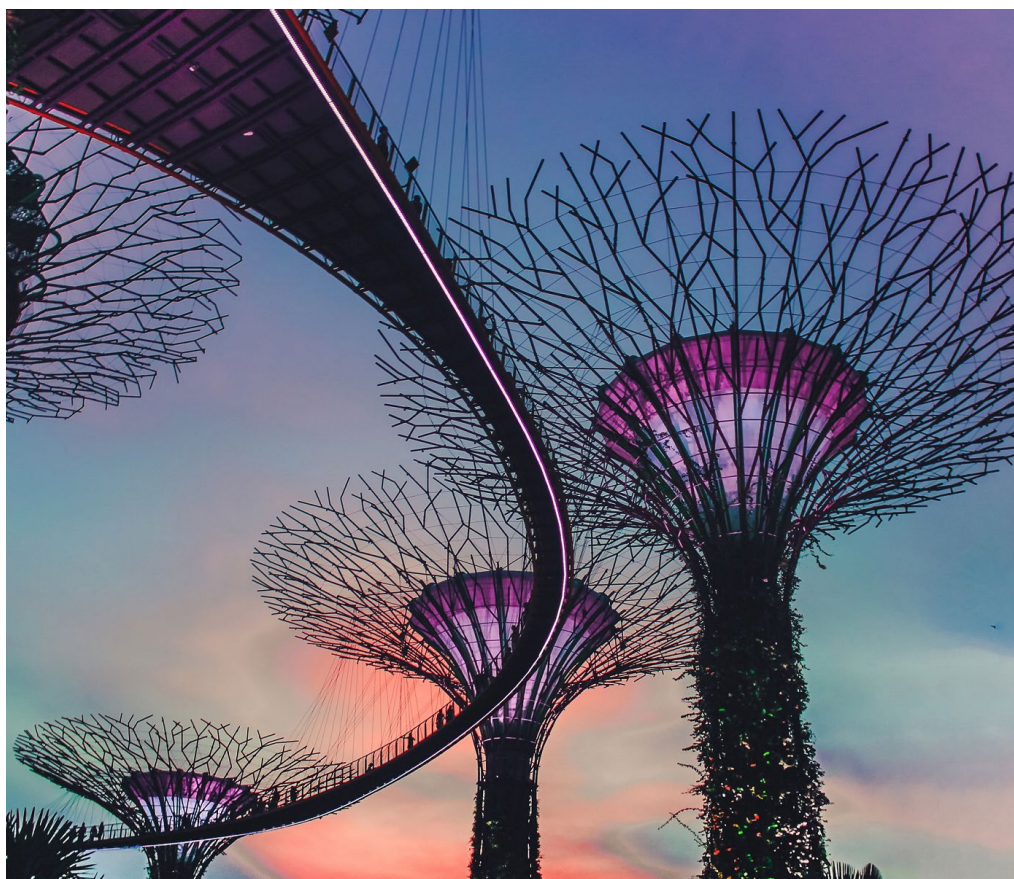
Two research associations in the UK and Japan have cemented their close ties through a new partnership agreement. MRS and JMRA (Japan Marketing Research Association) have jointly announced this new agreement and confirmed its scope, following many years of co-operative working and the continuous sharing of information.

This represents MRS's first formal partnership with a research association based in Asia. The overall objective of this historic international collaboration is to strengthen the relationship between the two organisations, which have long records of effectively serving their national markets.

Specifically, the agreement will involve reciprocal discounted member rates of 10% for all MRS and JMRA members joining the other research association. It will also include exemptions from any joining fees and will mean JMRA Official Members can become MRS Company Partners.

The initial duration of the partnership will be three years, with activities to be reviewed annually to ensure they are being delivered as set out.

Web: www.mrs.org.uk



The Asia Research ANNUAL STAKEHOLDER SURVEY

The 2021 Asia Research annual stakeholder survey gives cause for optimism for the research industry. When we conducted this survey in October 2020, a net 40% of clients expected a decline in research budgets for 2021, and 26% said that the status of consumer insight was declining in their organisation.

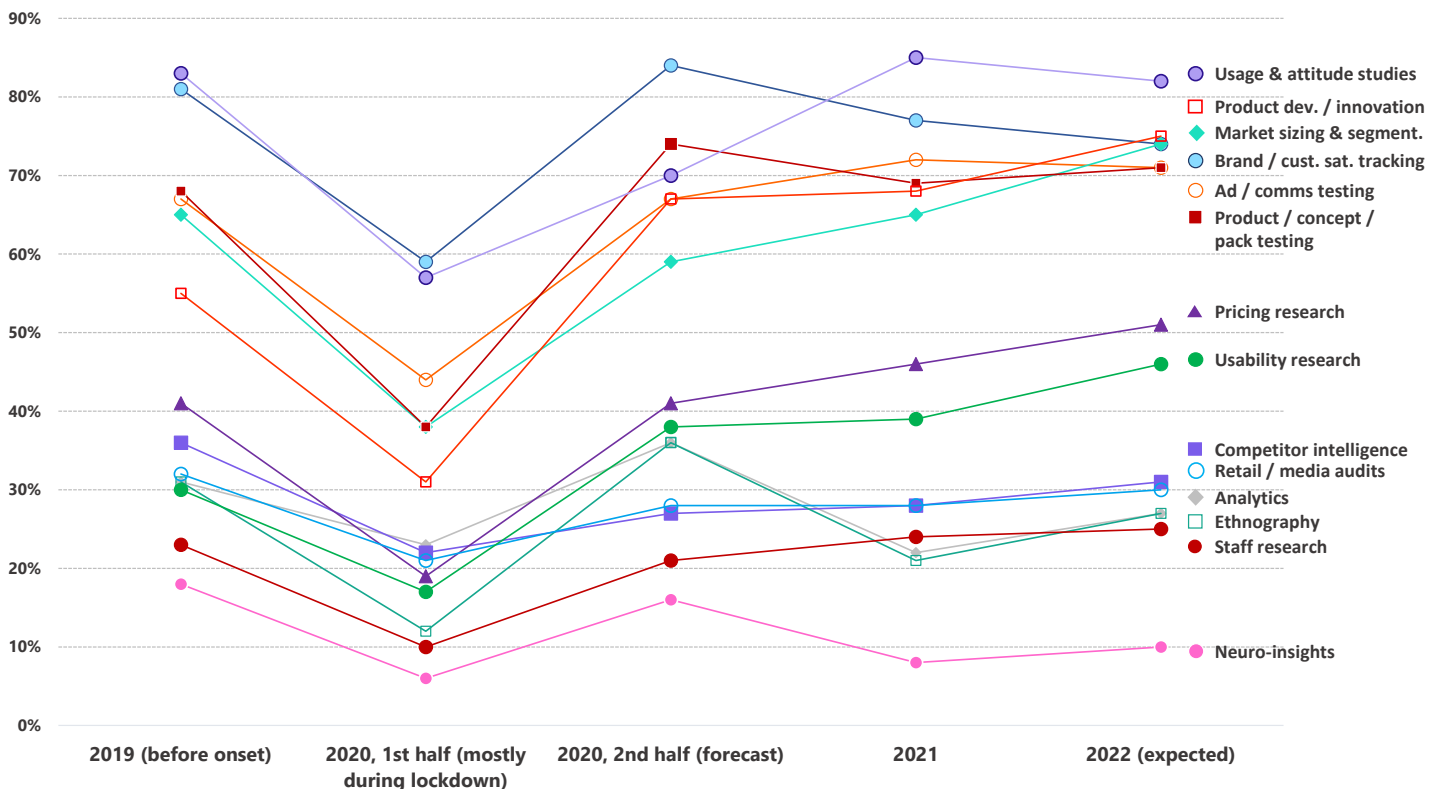
This year, a net 16% of clients say budgets for research will increase in 2022 and only 17% state that consumer insight is declining in status vs 67% increasing (the remainder unchanged).

Correspondingly, on the supply side many agencies in 2020 reported salary/benefits reductions and redundancies, but in 2021 agencies said they made more hires than redundancies, and a net increase in

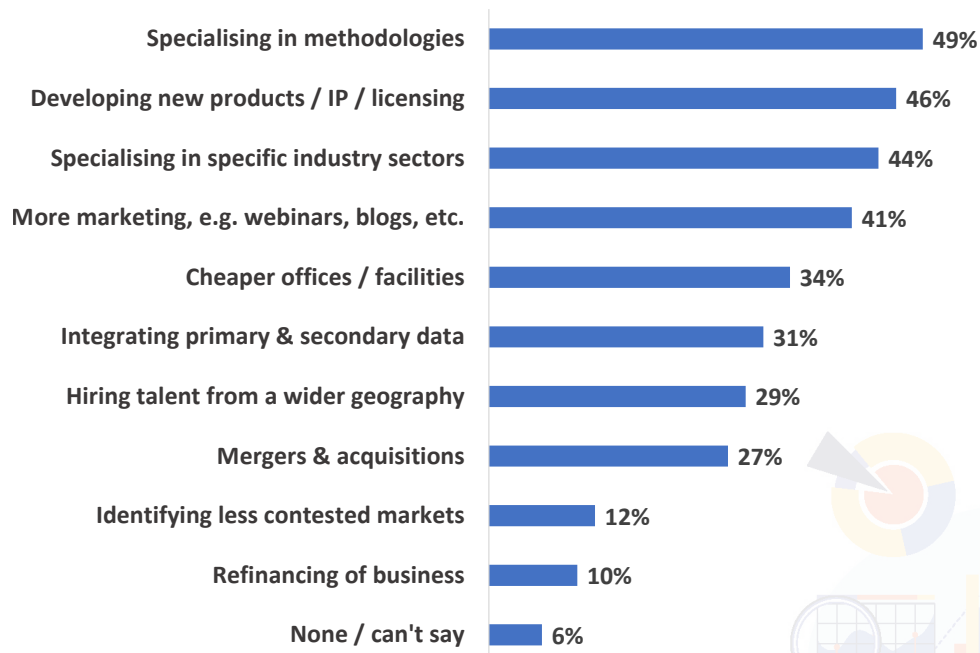
compensation. 65% of agencies state that new hires were made by their firms in 2021 vs 17% reporting redundancies, and 36% say that salaries and benefits have increased vs 17% decreasing.

The impact of the pandemic was less than predicted in some respects. In 2020, 47% of clients said that their pre-COVID tracking data and segmentation models would need 'a lot of' or 'complete' updating, but in the

Type of research undertaken through the pandemic



How supply side companies are responding to challenges



2021 survey only 16% reported significant changes to their models – the rest stated that pre-COVID models were still mostly relevant.

Through the pandemic, there was a big hit to the amount of research being conducted in the first half of 2020, with a marked drop in every research area (see chart). There has been a recovery in 2021 that reflected what the industry was expecting, with most research areas restored to pre-COVID levels. The results highlight growth in key areas including *pricing research* (possibly due to disruptions in shopping behaviour as more consumers switched to online shopping), but most notably for *usability research* that is expected to grow further into 2022. As corporations place more emphasis on customer experience, this has encouraged more research into usability, as well as more use of self-service channels, including online.

Market sizing and segmentation research should be in greater demand in 2022, while tracking and U&A remain steady, and along with product testing remain the backbone of the industry.

Many forecast a large rise in analytics on the recovery, but far fewer agencies see this as being part of their portfolio in 2022. But this could be down to clients undertaking *analytics* in-house, and indeed 43% of clients used this in 2021, and this is expected to rise to 53% in 2022.

Neuro-insights remains a niche area and sees little prospect for growth. *Ethnography* did not recover

as expected and still faces some limits due to social distancing, although digital ethnography is an option. Staff research and competitor intelligence have recovered but are not growing past pre-COVID levels.

CHANGES TO BUSINESS MODELS

The far bigger changes that have occurred during the pandemic have been to the business models of supply-side companies. In 2020, a net onshoring and insourcing was reported as a means for protecting jobs, but we now see the opposite, and this is expected to continue into 2022. It is possible that the industry had to lose a lot of blood in 2020, but does not want to take back the overhead in the recovery.

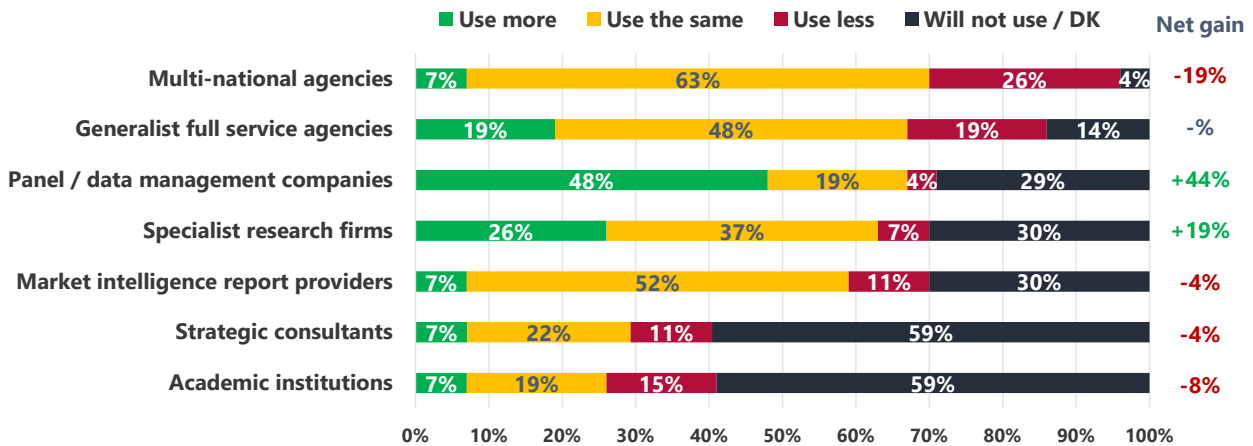
Furthermore, agencies are now using remote working as a means of casting their recruitment nets much wider, even internationally. 29% say that in response to the challenges the industry is facing, their companies are hiring talent from a much broader geography to work remotely. Another initiative to meet the changing market is to *specialise*, including for methodology and for specific industry sectors, although relatively few firms say they are looking to identify new, less contested markets to sell to.

Remote working has also helped companies reduce their costs. 34% of companies have reduced costs by moving to cheaper locations or downsizing their facilities and having more people work from home. This is now becoming a longer-term norm.

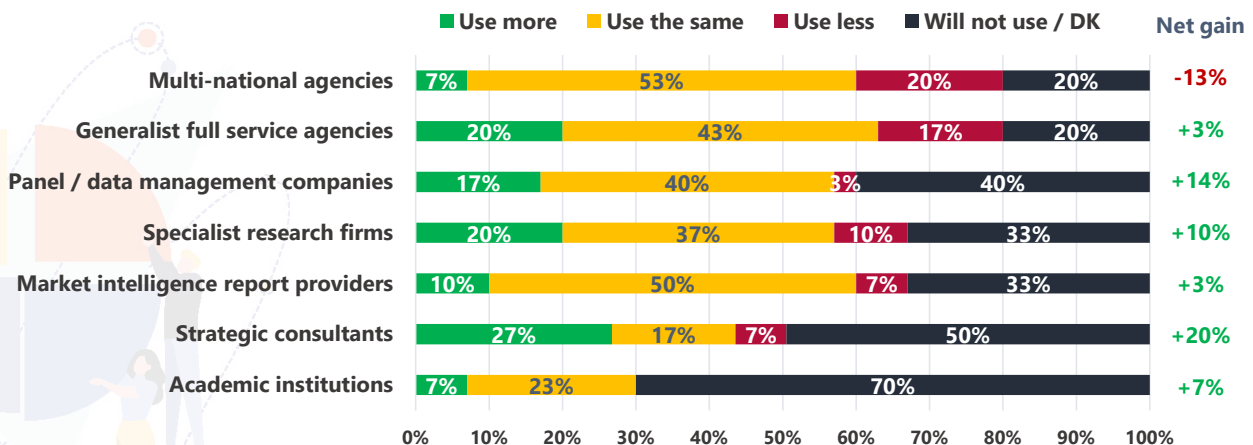
Changes are also happening on the client side. Almost

Type of research vendor clients will use in the next year

2020 Asia Research Stakeholder Survey



2021 Asia Research Stakeholder Survey



all client-side researchers are learning new skills, partly because they are undertaking more research in-house. Mostly notably, 83% of clients are looking to integrate primary research with other data sources, e.g. in-house data held on customers. 73% are advancing their data visualisation to design their own internal presentations, and 43% are training themselves on self-serve, online survey platforms.

THE OUTLOOK

Even though client budgets are expected to recover, competition remains stiff for suppliers of research. Clients expect to reduce the range of vendors they use, and similar to the 2020 survey, the net loss is higher with multinational agencies. While the portfolio of vendors used might go down, some stand to benefit more, including both the generalist and specialist

agencies and the panel companies, although the panel companies might not see the same gains as before. But it is the strategic consultants who could benefit most from the changes, with 50% of clients expecting to use them for their research needs (compared to 41% in the 2020 survey), and a net increase in their usage of +20% compared to -4% the previous year.

These shifts reflect the changing needs of clients in the new market. When clients were asked what factors would determine whether a research vendor was 'in their consideration set' for new projects in 2022, the highest consideration was 'their ability to provide higher-level business and marketing context to the research findings'. This is likely to push business not only to the strategic consultants, but also to the smaller agencies where clients can usually obtain more senior level involvement in their projects. •

PRESIDENT OF ESOMAR INTERVIEW WITH KRISTIN LUCK



Asia Research spoke with Kristin Luck in October 2021 to assess the state of the consumer insight industry and the key developments to expect in a recovering market.

Kristin became President of ESOMAR in March 2021. She runs her own growth strategy consulting firm, and also provides investment banking services to those investing in or buying/selling businesses within the marketing consulting/insight sector.

Kristin comments that the consumer insight industry globally has fared much better than analysts were expecting. By the end of 2020, the industry had seen just a 6% decline, when many were expecting a decline of 20% or more. There were considerable variations by geography, partly due to when the pandemic impacted the various global markets. Asia Pacific saw the earliest recovery, and there has been some rebound in the UK and Europe, while Latin America has been the slowest to recover.

However, the biggest positive impact on the global position for the consumer insight industry is the US market. The research tech sector actually experienced growth during the pandemic, and with it, investment and growth in tech-related consumer insight. In 2020, the US accounted for 54% of the global spend on market research, compared to 44% in 2016. The Asia Pacific share still stands at 15% (the same as 2016), but has grown in absolute terms from USD\$6.52 billion to USD\$13.78 billion.

This growth is partly attributable to some redefining of 'market research' in the market sizing calculations, as technology providers within the consumer insight arena are now included. This reflects clients seeking insight from 'data' and not just from traditional consumer insight.

'Traditional research' has been in decline since before the pandemic, although Kristin points out that clients still value traditional methods, but want to see the marriage of both primary and secondary data to obtain the 'bigger picture'. With a huge shift towards online shopping, online media, and e-commerce, corporations also benefit from having far more data to use from online activity and transaction information.

Another key development is faster-turnaround research, which means that corporations can respond more quickly to changing markets. The pandemic was an unpredicted and highly disruptive event, requiring corporations to respond very quickly to lockdowns but also to the reopening of markets. There has been development of platforms and end-to-end solutions to provide both speed and value for money, and consequently we have witnessed huge investments and M&A activity among technology providers in these fields, such as Qualtrics, FocusVision, Conconfirm, and Quantiloop.

In parallel, we see M&A activity among traditional research firms. Most of the big firms cannot grow organically, as many of the key global research markets have almost reached saturation. The big firms have relied instead on acquiring others to grow or maintain market share. Some of the more generalist boutique research firms have been 'eaten up' in this manner, or have gone out of business if they cannot demonstrate a sufficient level of specialism. Kristin summed this up: "It used to be the case that if you were all things to all people, you would grow. Now it is the opposite – >>>



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the more specialised you are and the more specialist advice you can bring, the more business you will get."

THE OPPORTUNITY WITH CHANGING BUSINESS MODELS

Kristin comments that the pandemic has also fundamentally changed the way consumer insight firms do business. Clearly, lockdowns have forced employees to work from home more, and as a result, companies have been able to reduce their facilities costs by taking smaller offices and/or operating a hybrid office- and home-working arrangement for the longer term. It also means that the location of the office is less crucial if employees only have to make the commute two or three days a week.

But the bigger opportunity is how remote working takes away the limits of hiring by geography. While firms have offshored work to cheaper locations for many years now – e.g. locating back-office work in low-cost markets – the bigger opportunity is now in identifying and hiring talent nationally, regionally, or even globally that is the best fit for the company – people who never have to relocate, and can come to the office or other centralised meeting point perhaps once a quarter while on a tourist visa. There are even HR firms (like Deel) that specialise in managing staff scattered around the world, e.g. handling payroll, legality, and healthcare.

Kristin points out that if there are two firms competing with each other, a "remote-first" firm – the firm that utilises global talent and has lower overhead costs – will likely outcompete the firm with an "office-first" approach, which is limited to hiring within its city catchment area.

THE THREAT OF BIG CONSULTING

We have seen how 'big data' can work in harmony with traditional research, but Kristin raises the issue of 'big consulting'. With easier access to data, management consulting firms are increasingly offering consumer insight as part of their services. Market researchers have for too long been 'wrapped up in tables and charts', whereas management consultants are better at storytelling, identifying the 'so what', creating hypotheses, and interpreting what consumer insight means for the whole business.

They have the advantage of having much more strategic relationships with their client organisations and contact with the C-suite. Kristin comments: "The difference between research agencies and 'big consultant' is that the latter 'thinks like a CFO and presents like a CMO'."

It seems like clients might be willing to pay large premiums for consumer insight after all! •



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INSIGHTS ON DEMAND

HOW DATA-DRIVEN INSIGHTS ARE TRANSFORMING MARTECH

BY PHIL AHAD, CHIEF DIGITAL OFFICER, TOLUNA

As we emerge from a highly disruptive year, many brands are still reeling from the realisation that the world can transform in the blink of an eye. For example, 59% of consumers are more open to trying a new product than they were pre-COVID (Figaro Digital).¹



In a consumer market that changes at breakneck speed, with unknowns around every corner, brands face immense pressure to keep pace with the rapid shifts in consumers' needs, desires, and behaviours.

Now more than ever, brands require market research solutions which deliver real-time insights to stay on top of ever-changing consumer sentiments. Insights are the new currency for business leaders, and research that captures consumer sentiment and behaviours in real time will create a competitive edge. Best-practice marketing organisations are devoting 30% of their budgets to technology platforms (Gartner Annual CMO Spend Survey).² Similar to the way entertainment industries have adopted 'on demand', we are now experiencing the shift towards 'always-on' research. A shift that will change the role of research for brands moving forward.

RESEARCH TAKES A SEAT AT THE TABLE

Traditionally, research has lagged behind marketing's footsteps in speed, technology investment, and research and development strategy. Efficiency is key for marketers, which is why they spend up to 30% of their annual budget on technology to drive maximum efficiency. 77% of insights professionals report feeling budget pressure and many (54%) look to automation to help drive value and time efficiency (Greenbook GRIT Q3 2020).³

That means that taking days, weeks, or months to

complete actionable research reports simply won't work. Now, with the digitisation of research and the implementation of cutting-edge technologies, research is finally able to keep pace with marketing and advertising departments while matching their agility and flexibility.

As real-time insights become the norm, executives are placing a new emphasis on research as a critical business function. In an ever-changing market, real-time insights are not a 'nice to have'; they have become an absolute necessity for brands to get an accurate picture of consumers in that exact moment, allowing them to make swift business decisions in a quick and timely manner.

FROM PROJECT-BASED TO 'ON DEMAND'

Times are changing. Traditional project-based research simply no longer meets brands' needs. This past year has reinforced the notion that brands must engage with consumers in real-time, all the time; the pandemic affected the way brands operate and consumers showed us that they can change their behaviour at any moment. Because of this, the research model of tomorrow must be fast, easy, and flexible so that brands stay on top of customers' opinions as they change.

This business need for real time insights will ultimately reduce the need for project-based, one-off research. Instead, ResearchTech that captures what consumers feel, think, and do in real time, in collaboration with

>>

strong MarTech and AdTech, will prove essential for brands to inform their digital strategy and evolve to remain relevant. With the use of real-time insights, brands will be able to stay one step ahead and tweak their brand message as consumer sentiment shifts.

INCREASED ROI

'Always-on' research isn't just a buzzword. The insights derived from real-time research have substantial business benefits; this not only provides a window into the minds of consumers which can be accessed on demand, but this cutting-edge, digital, 'always-on' research improves ROI. And more than simply increasing the ROI of research itself, having access to real-time insights will ultimately also improve the ROI of marketing and advertising, alerting brands to any shifts in consumer sentiment and allowing them to adjust campaigns in real time.

As more organisations recognise the measurable business impacts of always-on research, and savvy leaders recognise its tangible business value, research will hold an even more important role in the strategy room.

RESEARCH OF THE FUTURE

It's clear that today's brands must move away from a legacy, static research model to ensure they stay relevant and meet evolving customer requirements.

We have found in our proprietary research that quality, global reach, targeting, and speed are the four key buying factors for online consumer audiences. Consumer sentiment and behaviour has always been a moving target – but we must realise that the – pandemic accelerated that pace, and if brands want to respond and remain relevant, they need the right insights to adjust and adapt their strategy in real time. This is a make-or-break moment for brands, and they must leverage all the tools available to them to stay ahead of the pack – and constant, real-time access to critical insights will mean the difference between innovation and stagnation.

'Always-on' research is not only revolutionising and transforming the way brands gain consumer insights; it has become a critical business tool. Brands must stay one step ahead of consumers with real-time insights – or risk being left on the shelf. •

[1] A Year in Review: The Ever-changing 2020 Consumer, and Planning for 2021, Figaro Digital. [2] The State of Marketing Budgets 2021, Insights From Gartner's Annual CMO Spend Survey, Gartner. [3] GRIT Report: Business and Innovation Edition 2021, GreenBook.

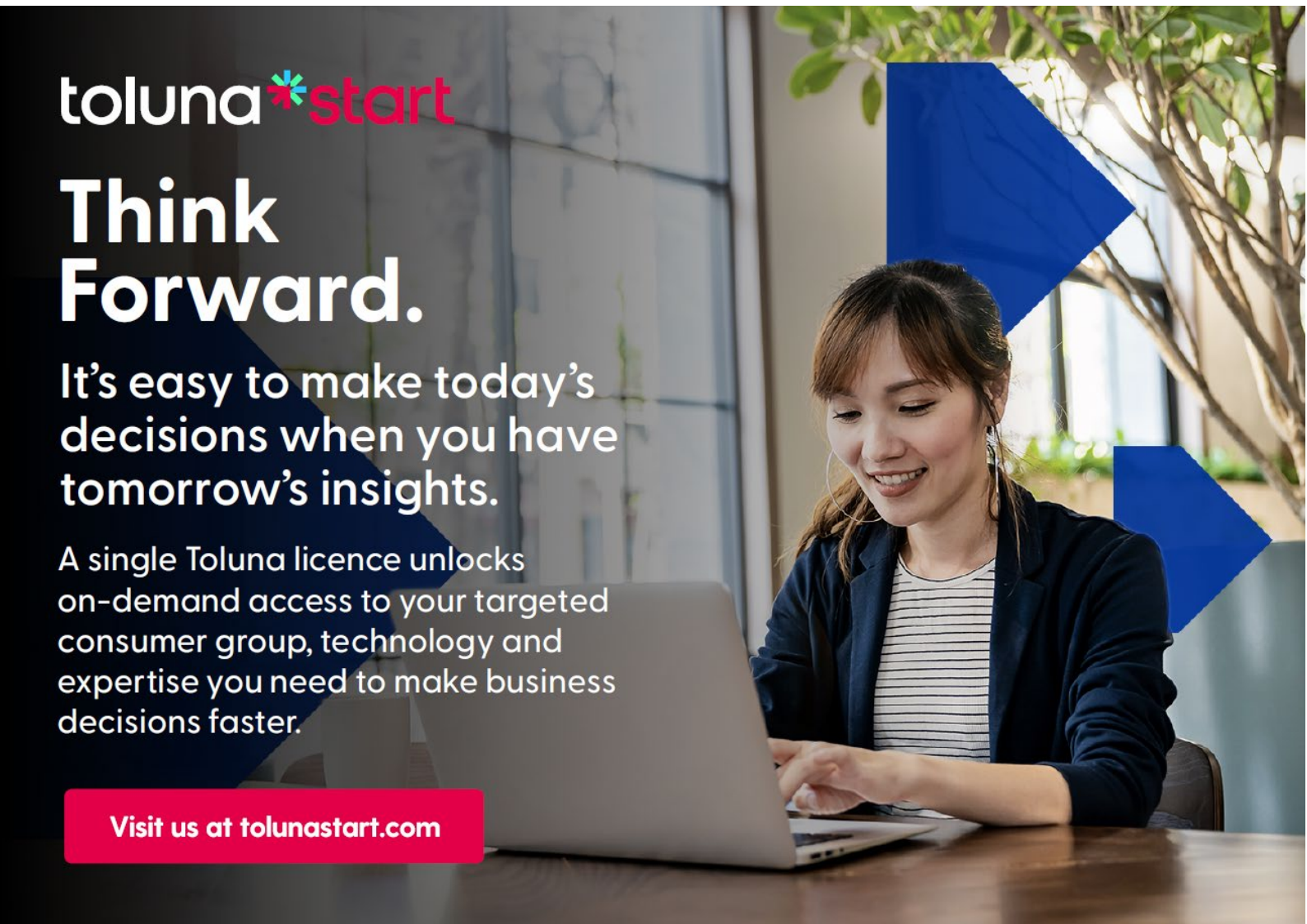
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THE E-COMMERCE ENGAGEMENT SHIFT:

HOW SHOPPER EXPERIENCE CHANGES BRAND NARRATIVES

Lester Sualog, Senior Client Development Director, Asia PureSpectrum and Kriska Ramos, APAC Regional E-commerce Manager, Shiseido

The growing appetite for consumer experiences is riding the wave of offline to online brand narratives. With the pandemic accelerating online shopping, it has changed the context, environment, and motivations of consumers in the Asian region.

As an effect to brands, new shopping behaviour has expanded the 'moments of truth' from brand-centric content created as feeds of an e-commerce platform to a world of experiences-driven social media heuristics. Generating consumer pull via brand-generated content alone rarely guarantees a sale these days. A typical person is exposed to hundreds of marketing messages and makes thousands of decisions daily. The chances of one brand message being able to influence someone's decisions are vanishingly low.

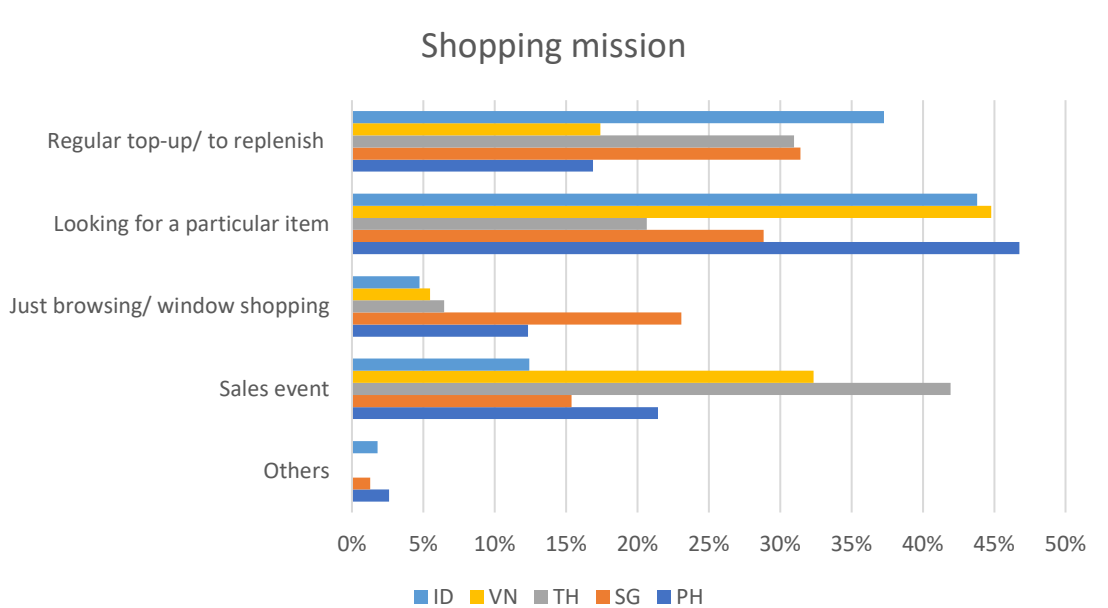
Fortunately, our understanding of decision-making has expanded dramatically over the last few years, thanks to the two interlinked decision-making systems: System 1 and System 2. System 1 decisions are guided by a variety of things – past experiences, habits, or emotional associations. It's also – and here is where shopper insights come in – strongly directed by the shopping environment. System 2's role is simply to ratify and justify decisions.

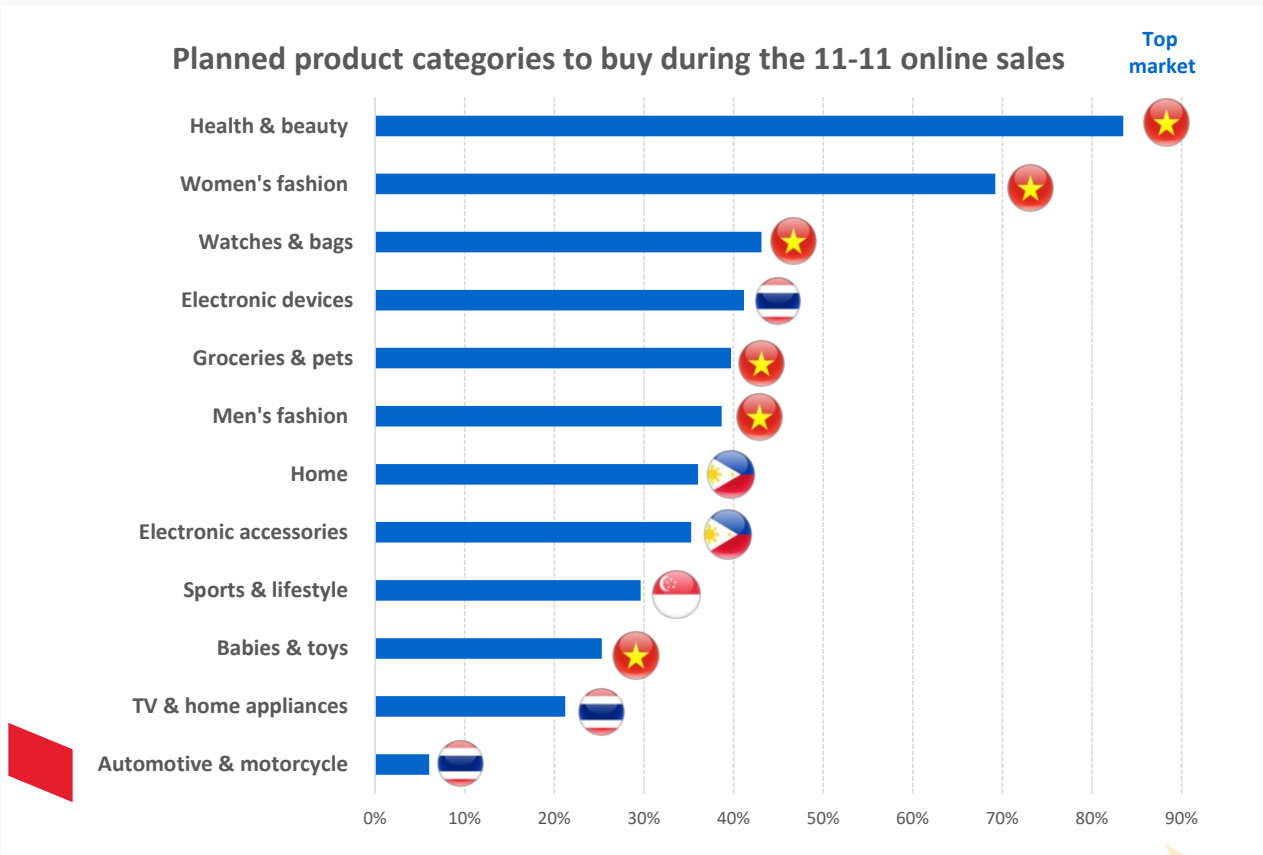
Given the shifts, the future opportunities lie in our ability to understand and tap into how people make decisions in a specific shopping context.

ADD-TO-CART TRIGGERS

Most of the industry's pre-pandemic baseline data on online shopping behaviour showed that it was mainly driven by special occasions and not the usual, go-to channel when consumers are thinking of buying something. With staying home was the default situation during the pandemic, online shopping changed the brands' environment, narratives, and sensory triggers, which can all be summed up as 'experiences'.

We see differences in online shopping uptake among markets in the region. In our study conducted in the first week of November 2021, among five markets – Singapore, the Philippines, Indonesia, Thailand, and Vietnam - Singaporeans tended to just browse for items online, while consumers from other markets would





mostly go online with a particular shopping mission, e.g. looking for a particular item to buy.

As online shopping behaviour leapfrogs across Asian markets, understanding 'stopping power' initiatives to catch the consumers' attention is not enough any more. Both brands and e-tailers must develop 'moving power' mechanisms through memorable experiences to get the most of each online shopping mission.

EXPERIENCE IS EVERYTHING

With brands putting together an always-on approach, customers are searching and discovering new experiences daily according to Shiseido's APAC E-commerce Manager, Kriska Ramos. As one of the world's largest health & beauty companies, Shiseido, ensures that the company covers the most relevant e-commerce touchpoints for targeting and retargeting customers. Key experience activities include livestreaming, key opinion leader reviews, influencer collaborations for unboxing, branded Instagram filters, virtual make-up try-ons, virtual launch events, and gamification partnerships with key e-tailer partners.

So what online shopping experiences are working so far? Kriska Ramos affirms that livestream events bring conversion up to 20 times higher if a customer is directly driven to a product page during the broadcast. Aside from driving sales, livestreams build the brand's credibility when a key opinion leader is paired with a product. Success stories are already being seen in China and South Korea, while the rest of the Southeast

Asian markets are catching up, opening a lot of room to play and innovate.

THE BIG EVENT: 11-11

This year's 11-11 sales event saw a significant jump from last year's consumer participation across the five markets that we have studied. Except for Singapore, 8 in every 10 consumers' from the Philippines, Thailand, Indonesia, and Vietnam have indicated that they will most likely participate this year.

From the same survey, we predict that the Health & Beauty and Women's Fashion product categories will get the most of the consumer's shopping budget out of 11-11 online sales transactions.

With Singapore again differentiating itself from the pack with online shopping, the rest of the SEA markets are experiencing a shopping surge across product categories.

THE DOUBLE-DAY SALES EVENTS

A major assumption of marketers about the effect of double-days on the 11-11 sales event is that it will tone down the impact of the annual Singles' Day shopping spree. What we found out was the contrary:

double-days have encouraged online shopping habits among the cross-section of the general population. In addition to the steady base of Southeast Asia, online shoppers who are women, aged 18-44 years old, the online crowd has expanded this year to include more



men and those who are from mid- to low-income households.

What's interesting to note is that as online shopping is embraced across demographics, the need to customise the shopping experience based on addressable consumer target markets is overwhelmingly relevant. Both brands and e-tailers must already know that there is no such thing as one size fits all for online shopping consumer targeting.

SPEED TO INSIGHTS IN WRITING THE E-COMMERCE PLAYBOOK

Today's online shoppers want information at the swipe of a mobile phone or the tap of a finger. Consumers should be able to easily navigate a brand's website, so attention is held through the completion of a transaction. The platform navigation experience is such a big part of the customer journey, both brands and e-tailers should continuously invest in optimising their key visuals and relevant creative assets.

When undertaking optimisation research work, it has been said that testing often and testing early are key to having successful online shopping content and experiences. The understanding of the dynamics of the

two interlinked decision-making systems, System 1 and System 2, should be part of the consideration in the research design. However, at PureSpectrum, we put an additional layer of speed and quality into perfecting the performance of our clients' e-commerce investments. Our Insights Platform integrated with our quality-first Marketplace Platform provides unparalleled speed and data quality.

PureSpectrum offers complete end-to-end Insights and Marketplace Platforms, helping insight professionals make decisions more efficiently and faster than ever before. PureSpectrum, the recent winner of MR Supplier of the year by Quirk's, has pioneered PureScore™. PureScore™ is a respondent-level scoring system, bringing a new standard for data quality to the MR industry.

Methodology: PureSpectrum interviewed a total of 1,500 general population respondents (males/ females, 18+ years old, from all household income classes) from Singapore, the Philippines, Thailand, Indonesia, and Vietnam from 5-9 November, 2021.



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GEN X: THE MARKETING BLIND SPOT?



JAMES REDDEN, MANAGING DIRECTOR-ASIA PACIFIC AND
SATPAL DARYANANI, RESEARCH MANAGER 2CV

Young consumers have always been the key focus of attention for marketers in Asia.

With a population that is young (over half the population of India and over a third of the population of China are under the age of 30) and a world that is rapidly turning to technology, Gen Z and Millennials are the audience of focus.

Baby Boomers and Traditionalists (75 years old and above) also receive attention from some quarters, primarily due to their perceived differentiated needs (healthcare, housing, etc.). In all this hyper-classification, the Gen X consumer often gets left out.

Born between 1965 and 1980, Gen X are often referred to as the 'sandwich generation', sitting between the analogue life of the Boomers and Traditionalists and the digital-first lives of Millennials and Gen Z. Due to this, brands tend to bundle Gen X with their adjacent cohorts. However, upon closer examination, Gen X have several distinct characteristics of interest to marketers. While not making the headlines like their younger cohorts, Gen X could potentially be the silent giant that brands need for their next stage of growth. Some of the key considerations for brands to cater to this cohort are:



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Powerful influencers

Gen X are an essential part of the corporate workforce and are at the peak of their working careers. They control some of the largest organisations in the world (Tesla, Tencent, etc) and are instrumental in making decisions that are shaping our world today. They are also here to stay, with the older Gen X expected to remain in the workforce for an average of 10 years and the youngest potentially working for another 30.

Heavy spenders

Despite the future potential of young consumers, Gen X have the money to spend now. Singaporean Gen X have a gross mean income that is almost double that of the previous generation. They are also responsible for the spending needs of more people than their cohorts. Roughly half of Gen X are supporting a parent and a child at the same time, making them the highest spenders among all the generational cohorts.

Experience chasers

With growing professional stature, Gen X are typically particular about what they wear, where they shop, where they travel, etc. They prefer quality over quantity and are willing to spend a lot on unique experiences. Gen X in Singapore and Japan generally spend over a quarter of their incomes on travel and holidays.

Deal-makers

Despite the focus on quality, Gen X like a good deal, and sales and coupons are a good way to attract their attention. 86% of Gen X were willing to try a new brand if it offers a coupon or a discount. They also like to get rewarded for their repeat business, with 71% appreciating rewards programs.

Digitally adaptable

While Gen X are not digital natives like Millennials or Gen Z, they have proven to have adapted well to the digital age. A study by HRD found that over half of Gen X employees (54%) in Asia were digitally savvy at work, on par with their Millennial (56%) counterparts. This extends to the way they make purchases. While Singaporean Gen X mainly prefer to use their credit cards, over half of them make payments with mobile/digital wallets.

Convenience hunters

Mostly working or with their families, Gen X are busy all the time, making convenience paramount during any purchase experience. They are more willing to try new categories (e.g. meal prep subscriptions, etc) or new purchase channels if it makes their life easy. Over one in three Singaporean Gen X have experimented with making purchases through social media sites (e.g. Facebook Marketplace, etc).

Gen X are silently powerful consumers who have the knowledge and the influence to swing key decisions in their household. Combining that with growing life expectancy rates in Asia makes this cohort a very attractive long-term proposition for brands in the region.

However, there are challenges in engaging with this audience. Being the 'sandwich generation', Gen X have influences from generations that came before and after them. Because of this, engagement with this consumer will need to be more personal and customised.

Brands who can effectively reach out to this diverse audience and provide products/services that focus on value, quality, and convenience stand to benefit from their business and loyalty. •

JAPAN'S COVID-19 VACCINATION PROGRAM

BY GMO RESEARCH

Recently, COVID-19 booster shots have been a much-talked-about topic globally. There have been many debates around the need for booster shots, with the World Health Organization (WHO) earlier calling for a halt to booster programs, especially in first-world countries with high vaccination rates.

The WHO suggested the pause in booster programs to allow for the available vaccines to be distributed to impoverished nations with low vaccination rates due to lack of vaccine access.

With some studies showing that the vaccine's effectiveness lasts for approximately six months, many countries are looking into offering booster shots to their populations to control the spread

of COVID-19. For example, in the United States, France, Israel, and Singapore, COVID-19 booster shot programs are in full swing, especially for the elderly and immunocompromised, despite calls by the WHO to delay booster shots and prioritise the evening out of vaccination inequality in the world.

The Japanese government recently announced that, from December, it would offer COVID-19 booster shots to anyone who has received both doses of the vaccine within the past eight months. Japan's health ministry has based its booster shot strategy on American research that indicates the vaccine's effectiveness wanes to 47% after five months across all age groups.

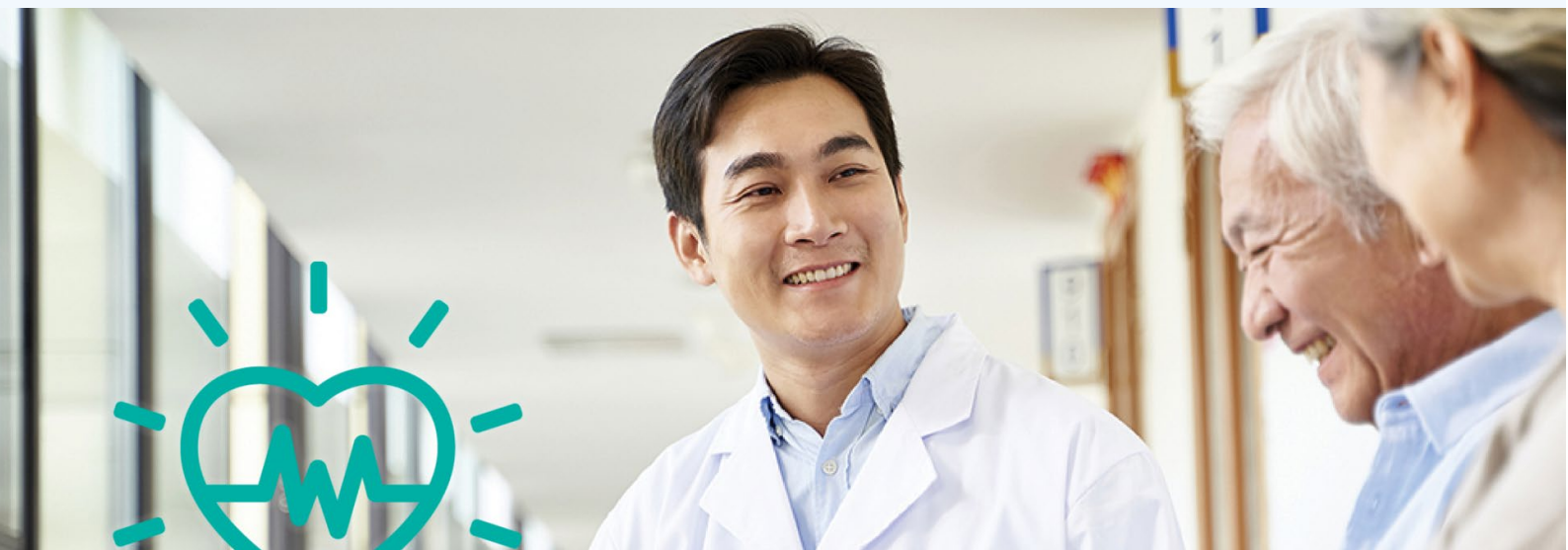
Japan has recorded 1.72 million COVID-19 cases, with a recovery figure of over 1.7 million and more than 18,000 deaths. The Japanese population was initially lukewarm to the COVID-19 vaccination. However, in the middle of this year, Japan managed to turn its vaccination rate around and achieved a fully vaccinated rate of almost 74%.

More than 400 physicians across varying specialisations have taken part in a study conducted by GMO Research on its Healthcare Insights Network, and 66% stated that they see the booster vaccine as a necessity for the Japanese general public. However, 25% indicated that

they were unsure of its necessity, while 9% suggested there was no need for the booster vaccine. The uncertainty over the need for COVID-19 booster shots could be due to the conflicting data and information available regarding the vaccines' efficacy.

While there may still be some degree of hesitancy around the booster shots, 81% of respondents said that they would recommend their family and friends get vaccinated with the currently available vaccines. Japan is offering Pfizer-BioNTech, Moderna, and AstraZeneca, and there still appears to be uncertainty over physicians' recommendations regarding the mixing of different vaccine types. 52% of respondents indicated that they think it is effective and safe to mix the vaccines to achieve higher efficacy and effectiveness. In contrast, 11% opposed the idea, and another 37% stated that they were unsure how safe and effective the mixing of vaccines would be.

These mixed sentiments could be attributed to the relative newness of the COVID-19 vaccines, and the availability of research and statistics. However, with Japan's current plan to move forward with offering the booster shots to its entire eligible population, it will be seen how effective the COVID-19 booster shots will be for the country. •



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SUSTAINABILITY IN INDONESIA IT'S DEVELOPMENT, STUPID!

By Piers Lee, Director, BVA BDRC

"It's the economy, stupid!" was a phrase coined by James Carville in 1992, a strategist in Bill Clinton's successful presidential campaign. While considering various strategies to unseat the incumbent, George H.W. Bush, the US economy at the time was struggling, and it was just so obvious that this is what mattered most to the electorate.

When politicians try to understand what is important to the people, they often make the mistake of believing that is the same as their own concerns or outlook. Lack of proper electoral research can result in listening to your own echo chamber, but narcissism can also be a factor.

There is a view that attitudes towards the environment in developed countries match attitudes in developing countries – this is far from the case.

Earlier this year, BVA BDRC was asked to assess what 'sustainability' means to consumers in Indonesia and what causes were important to them. In the West, 'sustainability' is often framed by net zero-emission targets, taking away people's cars and flights, and even deindustrialisation. When we surveyed 1,000+ consumers across Indonesia, we found that the interpretations of 'sustainability' were very different, with most framing this around education, the economy, and infrastructure.

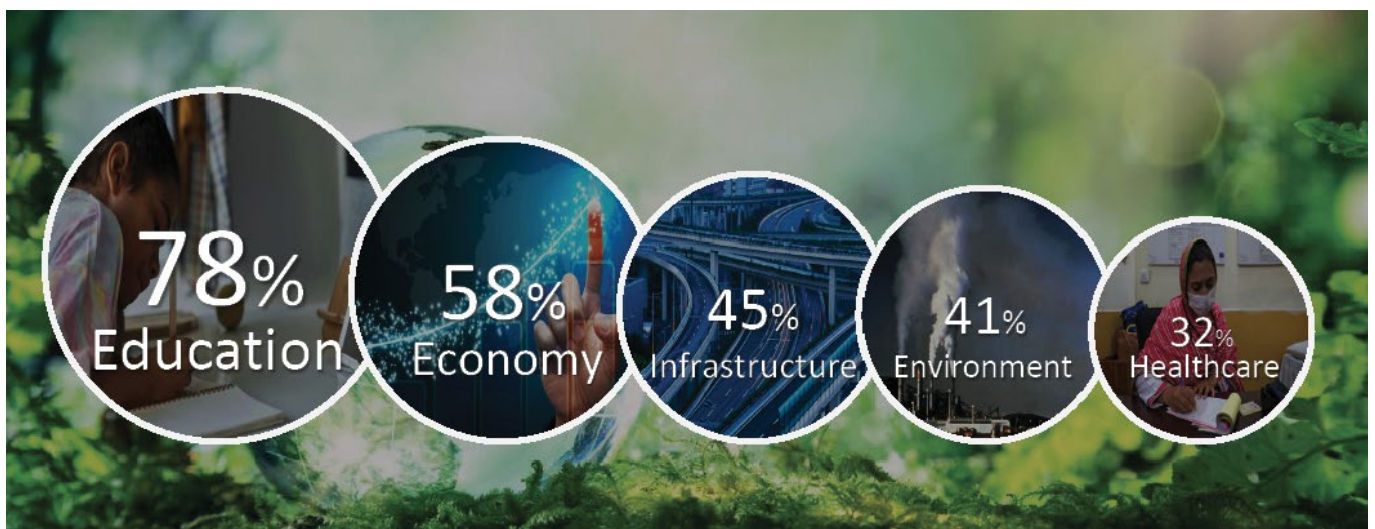
Indonesia is the 15th largest economy in the world and the largest in SE Asia. While its growing economy

brings millions of people out of poverty each year, income per capita is still very low at just US\$ 3,900 (2020), compared to US\$ 7,800 in Thailand, US\$ 10,400 in Malaysia, and a whopping US\$ 65,200 in Singapore.

Indonesia has a young population, and by 2030 about 70% will be working-age adults, a circumstance that will supply the nation with a beneficial demographic structure for wealth generation. While much has been done to improve state education in Indonesia, the country still has lower literacy levels and fewer graduates compared to other SE Asian nations.

Hence, many Indonesians see improving education as the means for a more sustainable future – 78% wanted more support for education programs, and 58% to address 'economic sustainability' that included supporting business and entrepreneurship and reducing social and economic inequality. Inequality is very high in Indonesia, but the research showed that relieving poverty, facilitated by better education and a thriving economy is part of the solution.

While 41% of Indonesians have concerns about the >>





environment, most of these relate to natural disaster relief – much of Indonesia straddles a tectonic plate boundary, meaning it is occasionally impacted by earthquakes, tsunamis, and volcanic eruptions, none of which are attributable to some of the mainstream issues around the environment, such as global warming. In fact, within the BDRC survey, only 19% of Indonesians are specifically concerned about climate change and air pollution.

Indonesia's more frequent environmental impact is from flooding, particularly within Jakarta – a low-lying

city at a tropical latitude. But many look to their much wealthier neighbour Singapore for solutions to this problem.

Singapore is at a similar latitude to Jakarta, also a low-lying city, and is affected by monsoons in the same way as Jakarta, that many experts say will become more frequent due to global warming. But Singapore was impacted by flooding far more in the 1960s and 1970s when it had yet to invest in the infrastructure to deal with it. Singapore's economy boomed, and this provided the means to invest in infrastructure. In the late 80s and early 90s, it implemented a range of flood control measures, including the construction of diversion canals in flood-prone areas and increasing drainage in new housing estates. Thereafter, flooding and the resultant loss of life and property has decreased significantly. Having lived in Singapore for over 20 years, I can only recall one occasion when I could not leave my home due to flooding.

Hence, infrastructure development can be seen as a better solution to climate change than measures proposed by those in more developed countries. Organisations like Extinction Rebellion have their origins in developed countries. Those most impacted by climate change are instead within developing countries, and their interpretation of 'sustainability' can be very different to those in the West who think that deindustrialisation is the answer to these challenges – in case you didn't know, "It's development, stupid!" •



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UNLOCKING BEHAVIOUR OF ELECTRIC VEHICLE OWNERS AND OPPORTUNITIES FOR MARKETERS!

By Borderless Access

Imagine people widely using smartphones and laptops in the 1980s, colour TVs in the 1950s, or motor cars in the early 1900s. These technologies were regarded as futuristic concepts at first, but eventually became a way of life.

Similarly, the idea of operating a vehicle using electricity was conceived in the 19th century. Unfortunately, the concept did not progress beyond just being an amusement, or as they say, a parlour trick – “Look! No horse or ox, yet it moves!”. Yet, after several ups and downs, when electric vehicles (EVs) subsequently entered the automobile market as an alternative to internal combustion engine vehicles (ICEVs), they failed to penetrate the market for multiple reasons.

With rising fuel prices and environmental concerns over the last few years, the automobile industry has witnessed the return of EVs, with new entrants such as Tesla painting a unique picture for the automobile sector with their high-performance EVs that use advanced technology. This led to a disruption in the automobile sector causing dominant automobile brands to rethink their strategy and evolve. But the big question is, have the industry and brands been able to address the consumer concerns associated with EV adoption?

Hence, Borderless Access conducted a study across 13 markets to unlock the evolving behaviour, brand preferences, and factors influencing the attitudes and perceptions of EV owners. The insights here would also highlight the opportunities for brand marketers and how they can help drive EV adoption to gain a bigger market share for their brand.

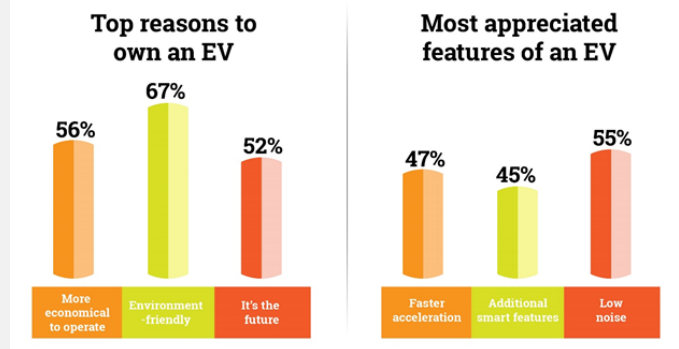
EVS ARE NOW MORE THAN JUST “CLEANER VEHICLES”

EVs have always been a smart environmental choice, and this is one of the top reasons for existing EV owners to choose an EV over a fuel guzzler, and a sizable proportion of respondents are considering purchasing one, with 67% stating that they believe faster EV adoption will help slow down global warming.

Another common reason for owning an EV is their low operating cost, which is a significant purchase factor for a large number of existing EVs.

It is common knowledge among EV enthusiasts that EVs are more economical to operate and maintain than ICEVs. EV sceptics, on the other hand, will point to the

Why consumers choose EVs over ICEVs?



premium pricing of many EVs. So, are EVs truly less expensive to own in the long run?

EVs are not only environmentally friendly; existing owners find EV's to be more comfortable, with better ride quality and fast acceleration.

EV OWNERS DEMAND BETTER CHARGING INFRASTRUCTURE

Among the factors influencing EV satisfaction, range – the distance the vehicle can travel on a single charge – is crucial.

Access to efficient charging stations is not only a concern for potential EV buyers, but it also has an impact on the level of satisfaction of existing owners.

Charging infrastructure remains of paramount concern due to the inadequate number of charging stations and long charging times causing range anxiety, influencing the purchase decisions of consumers.

36% of EV owners will consider an upgraded version only if it offers more drive range, while 49% of potential consumers will make a purchase decision based on the range offered.

OPPORTUNITY FOR EV MARKETERS

It is true that the movement towards cleaner vehicles has been a driving force in reshaping the EV market, and word of mouth has played a significant role.

While making an expensive purchase, buyers mostly rely on the opinion of existing owners or users. In the case of EVs, there are already several concerns about cost and convenience, hence, real-time feedback from friends and family appears reliable. This gives brand marketers a great indirect marketing and sales team in the form of existing owners (95%) who are inclined to encourage non-EV owners to switch to EVs. However, if the product does not meet the needs of the existing owners or creates a negative experience, then this can work against the brand; hence it's important for marketers to create fantastic experiences for their consumers at every touchpoint.

Almost on par with word of mouth, the next big medium driving awareness and influencing the purchase decisions are 'social media and digital ads'. A compelling ad instigates the thought of considering the product and then a potential buyer goes to peers for recommendations and existing consumers for feedback. Social and digital media has played a crucial role in promoting EVs as a cleaner alternative and marketers have used this agenda well to place the product.

FUTURE-WILL EVS TAKE OVER THE AUTOMOBILE INDUSTRY?

EVs do have a promising future. Consumers are more likely than ever to consider purchasing an EV, and sales could skyrocket.

However, there is still a long way to go before witnessing a complete shift to EVs. Manufacturers are attempting to address concerns about charging infrastructure and mileage. Charging infrastructure in some markets has certainly improved in recent years, which has been critical in the positive shift in EV adoption.

55% of potential buyers think that the improvement rate of charging infrastructure is slow, which consequently may impact the adoption rate.

For 56% of existing EV owners, government subsidies played a significant role in their purchase decision. Interestingly, 42% of intenders feel that the current incentive scheme should be improved to encourage them to make a purchase.

Collaboration between local governments and businesses can aid in determining the best strategy for EV charging station locations. By ensuring that the appropriate charging infrastructure is in place, one can ensure that their and the public's money is being spent wisely, facilitating the increased uptake of EVs.

CONCLUSION

To address raging environmental concerns and fluctuating fuel prices, the world appears ready to transition to EVs. The environment is not the only advantage of EVs. They are also cost-effective to operate and maintain. Nevertheless, the path to complete transition has several impediments.

The increasing demand for EVs is an opportunity to invest in EV infrastructure and consumer engagement. The top reasons for slow EV adoption are poor drive range due to limited battery capacity, cost vs benefit, and lack of adequate charging infrastructure. If these concerns are not addressed in a timely and appropriate manner, they can hurt potential consumers' purchase decisions.

Not just the potential of EV adoption, but the loyalty of existing owners will be determined by how well consumer concerns other than environmental impact are addressed and how brands create a positive experience for them. •



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LEADING THE GREEN CHANGE BUILDING COMPETITIVE AND SUSTAINABLE PRODUCTS

By EyeSee

Sustainability, climate change, and plastic pollution are the significant, unavoidable issues we need to face – and solve – in our lifetime.

While individuals can play their role in this, it is the brands that have the power to both help the cause and develop sought-after and future-proof products that are more sustainable – and that people want to shop for.

However, many new product strategies simply miss the mark, don't affect sales, or are labelled as greenwashing. The only way to do sustainability right is to think about the full picture – the product, its advertising, its claims, and the aim to understand who your consumers are and how they relate to this issue.

With the ambition to help brands take the green leap in the new year and beyond, EyeSee has run a comprehensive study that utilised a combination of methods such as eye tracking and facial coding to uncover emotional engagement and visibility, paired with virtual shopping (which famously has a 0.8–0.9 correlation with real shopper behaviour). On top of this, traditional methods such as MaxDiff claim evaluation and surveys were used as well.

Additionally, to help showcase how this can be done in practice successfully, Colgate-Palmolive's leading expert on sustainability, Cherie Leonard, shared her thoughts on what makes sustainable products truly competitive.

Here are the common myths about making sustainable products competitive on the shelf:

MYTH #1: SUSTAINABLE PRODUCTS ARE A NICHE CATEGORY – VERY FEW CONSUMERS ARE INTO THEM

The study uncovered that 86% of consumers are open to trying more eco-friendly products – implying that this is not only a not niche category but also an opportunity-packed one. This group consists of two segments: the True ECO buyers that are motivated to make a difference and change their behaviour, and the 'talk is cheap' segment who state they care about sustainable products but need incentives to change their behaviour. The remaining 14% are truly not interested in the cause and have no intentions to change their behaviour.

From Cherie's perspective, two big consumer trends have emerged – the first one is the urgency to take

action. As she put it: "We see this not only because people are seeing the good, such as cleaner air and fresher skies, especially through the early days of lockdown, but also because they're seeing the bad – suddenly, it became very apparent to consumers how much trash they produce as an individual and as a household." The second trend is the uncertainty of where to start acting more sustainably – and this is where manufacturers have an enormous opportunity to help and encourage their consumers to act greener!

MYTH #2: CLAIMING YOUR PRODUCT IS SUSTAINABLE MAKES A REAL DIFFERENCE

Product claims are the best real estate to describe your green impact quickly and clearly. Therefore, the study incorporated a claim test to understand how consumers perceive some of the most commonly used claims based on clarity and impact on shopping behaviour, such as 'eco-friendly', 'zero waste', 'sustainable', etc. In reality, while most claims were somewhat equally compelling, some are definitely a smarter choice for brands.

For instance, the three just mentioned are some of the worst-performing claims out of the tested ones! These findings indicate that consumers are unsure how these types of products contribute to a cleaner environment – and as such, they have very little to no impact on shopper behaviour. One of the brilliant ways Colgate-Palmolive saw packaging as an opportunity to educate their consumers, as Cherie explained, is by putting a QR code next to a clear and straightforward claim, to encourage people to learn more about the product, the pack, and the process and ultimately build trust with them.

MYTH #3: BUYING SUSTAINABLE MEANS 'SACRIFICING' CONSUMER EXPERIENCE FOR THE GREATER GOOD

One of the biggest misconceptions about sustainability is that it means lowering the standard of living or making consumers give up on the things they love and enjoy. What we have uncovered is that 41% of consumers are ready to buy more sustainable products – but only if they are better quality. This huge portion of shoppers that are ready to make greener purchases are opening



doors to brands not only to produce more sustainable products but to do so in a way that actually improves the consumer experience. And this is not a new trend – as with every NPD, every new product launch, brands are always striving to better the shopper experience and outdo the competition – so, why treat sustainable products any differently?

MYTH #4: WITHOUT CONSUMER DEMAND, THERE IS NO SPACE FOR OPPORTUNITY

Greener products are still a novel and growing market, so it is not surprising that the demand isn't overwhelming yet. It's the same with every new category – relying on the existing demand makes little sense. But this is where bigger brands can change the game – since over 27% of shoppers stated they would buy more eco-products if they were from well-known brands!

However, there are a few insights to keep in mind; as with any new product on the shelf, there are some consumer barriers that affect making sustainable products accessible and competitive to regular products:

- The price – The majority of people (50%) would purchase sustainable products if they were the same prices as their regular products.
- The unavailability – About 29% of consumers stated that sustainable products are not

available in the shoppers' area.

- The lack of variety – There are not enough options for sustainable products according to 27% of respondents.

So, when it comes to the incentives and barriers, it becomes evident that 'sustainable' must not become a synonym for premium and that the prices need to remain competitive.

MYTH #5: GUILT-TRIPPING WORKS WONDERS FOR ATTENTION

Most social media campaigns that tackle environmental issues communicate in a way that scares and makes consumers feel concerned about the future – but this approach has little impact on consumer purchase. This is why we zeroed in on how social media posts that focused on pollution impacted purchases for more sustainable options in a virtual shopping environment. Posts that are scientific in nature and offer some knowledge to consumers while making them feel good about their choices are the definite winners.

In Colgate-Palmolive's case, social media is a tool that amplifies the conversation on sustainability – and drives energy and excitement for what they are doing as a brand. It is also an opportunity for brand enthusiasts to share their knowledge and message about sustainability. •



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WHAT MAKES A RESEARCH ENTERPRISE IN ASIA?

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Vinay Rao
Regional Client
Business Partner
SKIM

Q. Tell us more about SKIM the company.

SKIM is a privately held global insights agency with a heritage of over 40 years, helping leading companies thrive by understanding decision-making. To stay ahead today, it's critical to know how decisions are made and how the changing environment influences decisions for consumers, healthcare and B2B professionals.

By adapting sophisticated research techniques and developing innovations to address this new reality, we provide our clients with practical recommendations in the areas of brand communications, revenue management, product innovation, e-commerce, and advanced analytics. Anything they can use to propel their business forward, online, and offline.

What sets SKIM apart is our decision behaviour expertise + analytical and choice-modelling roots + a thorough understanding of the marketing challenges brands face. This unique combination, along with our creative thinking, is the reason why strategy consultants and leading companies, from Fortune 500 to digital disruptors, continue to partner with us for decades. Our clients and industry peers recognised SKIM as one of the top 10 most innovative market research agencies in 2021 (Greenbook GRIT Report).

Our growing Singapore team works in close collaboration with 200+ enthusiastic SKIMmers from

across our other offices in Europe, the US, and Latin America. This enables us to provide local market expertise on a global scale for leading brands with multi-country operations.

Q. How long has SKIM operated in Singapore, and what was your reason for setting up in Singapore in the first place?

We opened the office in Singapore in January 2015. We saw increasing demand from our existing multinational clients who were – and still are – seeking to uncover market opportunities in Asia's high-growth economies through advanced research. Singapore gave us a truly global presence (time zone-wise), as we already had offices in Europe, the US, and Latin America.

This way we could offer global support across time zones and build regional expertise internally. We often still work directly with the teams in other offices when a client in Singapore is interested in conducting research there, and vice versa.

SKIM is a highly networked company with all team members routinely working on projects and initiatives across geographies. We have seen our Singapore office contribute globally to development of SKIM's innovations and thought leadership in Brand Communication (e.g., SKIM's Psychological Distance Framework) and Customer Decision Journey Mapping.



Q. What were some of your key challenges in entering the Singapore market? Was anything unexpected?

Certainly, it's been challenging! Every client wants you to show them that you have specific case study examples of their exact business questions, in their industry, in their country. Although we had a lot of relevant experiences and can apply our tools and methods to many of the same business problems, in our first years we found a lot of clients here were more risk averse, and hesitant to start with another partner if we couldn't show a very specific set of experiences. Nowadays we have a deep pool of local experiences to draw from, including in frontier markets like Myanmar and Cambodia!

In addition, we were faced with competition from local players who can be physically present more easily and more frequently. This meant a lot of travel in the pre-pandemic days! SKIM has always had a flexible work environment, so transitioning to a work-from-home environment after the pandemic wasn't difficult for us. We've been able to stay connected with our clients through digital channels (Google Meet, WeChat, Zoom, etc).

Q. How would you describe your success factors in Singapore? How did you develop your business in what is one of the most competitive research markets?

One of our key success factors was SKIM's global network. Through connecting with multinational clients

that we work with globally, we were able to have a decent base and have been able to build on that. We also adapted our offer to include quicker yet usable and robust products that don't break the bank for clients in the region, e.g. the more cost-effective SKIM Price Explorer™ tool. Also, unlike some of the larger agencies, we have highly technical analysts handling studies end to end, ensuring quality and key senior leadership involved in projects, providing consultancy and added value. For example, the global SKIM practice lead for communications is based out here and our clients benefit from his expertise on a first-hand basis.

Q. How have you been impacted by COVID-19? What are your plans for the recovery market or longer term?

Globally and within the Singapore office at SKIM we actually have had strong growth during the pandemic period. In Singapore, we grew our team of SKIMmers by 33%! In these uncertain times, we experienced even more how our clients are looking for that trusted partner they can rely on for the high impact and strategic business questions they are facing.

We have also been pioneers in e-commerce and decision journey research, which saw strong growth as the consumer behaviour changed in this period. We are in a strong position for continued growth.

Q. What advice would you give a start-up research/consumer insight firm in Singapore today?

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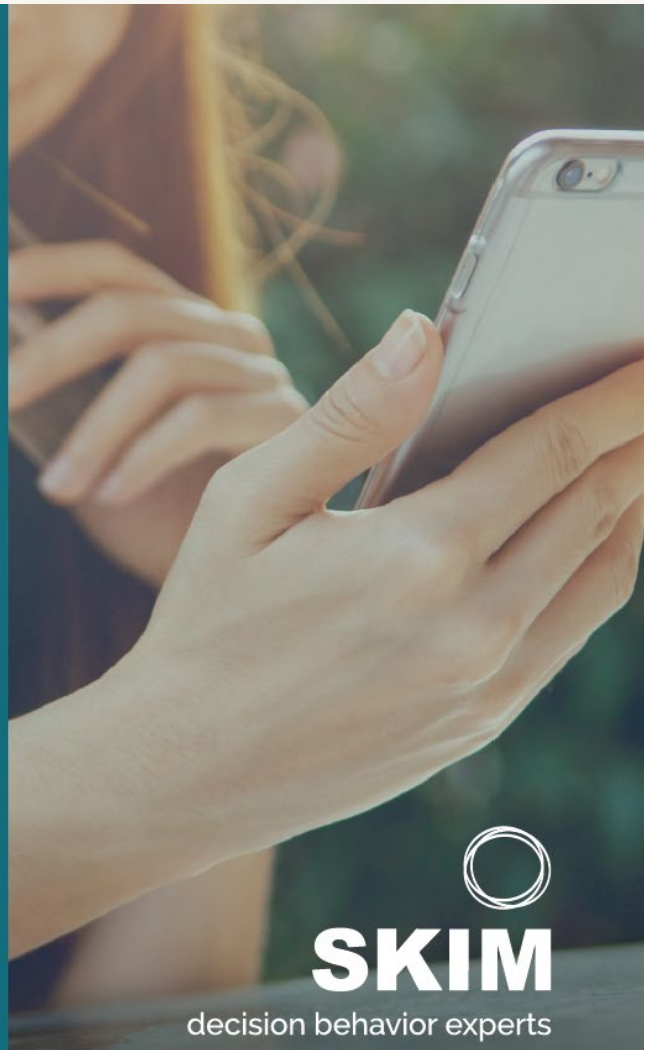
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Take care of your people, take care of your clients and the world! We are proud to be a company which really takes care of its employees, work-life balance and this has resulted in loyal employees. New companies should adapt to the new way of working post-pandemic. This means empowering employees to work in way that best suits them – at home, in the office, or in a hybrid set-up. Internally, we call this the NEO workspace. Clients are hungry for consultancy and deep insights in the region and it's a very networked space. If you provide excellent value, clients will beat a path to your door!

Finally, remember that no matter the size of your firm, you can make a positive impact outside of your own space. At SKIM, we have ambitious goals to help our local communities, become a carbon-positive company, and help accelerate the circular economy. We call this SKIMpact. Locally in Singapore, for example, we are helping 16- to 17-year-old students, many of whom have just graduated and may be applying for internships and jobs, to acquire Excel skills. •

Q&A WITH JULIEN CHEVIGNON

CEO OF YOUTOV ASIA PACIFIC

Q. Where does YouGov position itself? Are you an online panel company, a full-service consumer insight firm, or a hybrid of sorts? Is your position unique in any way?

YouGov is an international research data and analytics group, offering a full range of online research solutions to support a wide spectrum of marketing activities for our customers with our proprietary panel.

Since beginning operations, YouGov has used the internet to conduct its market research. Our business model has been built on the principle that internet-based research is more accurate than traditional research. Unlike other companies, this digital approach has placed YouGov in good stead for the interoperability of its products and services, easily aligning them into a single system. As an organisation that operates across borders, high standards are essential to our continued success. It ensures that our panels are always engaged within a GDPR-permissioned environment, which is supported by secure ISO 27001 certificated operations.

As the pioneer of online market research, we have a strong record for data accuracy and innovation. A study by the Pew Research Center concluded that YouGov "consistently outperforms competitors on accuracy" as a vendor of choice.

Q. When did YouGov open its first office in Asia, and what was the motive for YouGov to come into Asia?

In 2014, YouGov announced its first long-term strategic plan which focused on growing the company's syndicated data capabilities and expanding its geographic footprint to key emerging markets around the globe. YouGov has thus established its APAC presence in the same year through acquisition.

Besides, we've set up our first panel of Chinese consumers and have enabled it to launch a Chinese version of BrandIndex back in 2013. This operational establishment in the APAC region has also motivated us to come to Asia and develop a regional business centre here. This strategy accelerated our ability to enhance data capabilities and mobile technology, enlarge our panel, and grow revenue.

Today, YouGov has already emerged in the top 3 most quoted market research firms in Singapore, Hong Kong, and Australia; and we were named as the Research Agency of the Year in 2020 and 2021 by APAC Insider, two years in a row.

Q. What were some of the 'firsts' for YouGov in online research over the last 21 years (areas you innovated)?

YouGov is dedicated to innovating and improving its products and services to better cater to clients' research needs. Over the past 21 years, we continuously optimised our ground-breaking syndicated data solutions: the daily brand perception tracker, YouGov BrandIndex, and the media planning and audience segmentation tool, YouGov Profiles. Our market-leading YouGov RealTime provides a fast and cost-effective solution for reaching nationally and internationally representative and specialist samples. YouGov's Custom Research offers a wide range of quantitative and qualitative research, tailored by sector specialist teams to meet clients' specific requirements.

YouGov Crunch is the most advanced analytics tool for research data, combining super-fast processing with drag-and-drop simplicity. YouGov Cube is a unique, single-source, connected-data library that holds over 10 years of longitudinal data. We maximise the value of our connected data through these technologies and strong research expertise, including our application of Multilevel Regression with Post-stratification (MRP) methodology, to make accurate predictions at a granular level.

With our continuous innovation, YouGov data has successfully reflected our mantra: best panel – best data – best tools. >>



Q. How did you identify a need for self-serve online research, and who are the main users of this service? Does the 24/7 service involve 'human' servicing, and why is there a 24/7 need for this? How do you deliver this?

Nowadays, consumer attitudes and behaviours change every second. Timely consumer market insight becomes essential for businesses. That's how we came up with the idea of launching 24/7 research services, via YouGov Direct or YouGov RealTime.

YouGov Direct is a self-service platform where our clients can create and launch a survey straight away and get results within an hour.

If our clients need research support, they can also launch surveys with YouGov RealTime, where our research experts work around the clock with live chat support to get clients' surveys up and running.

This 24/7 service is suitable for all our clients who need instant and reliable data, especially advertisers, media-owners, and publishers.

Q. How does the recontact capability of panellists differ from that offered by other panel companies? What key benefits do clients see in this?

Some companies offer research services to help clients evaluate post-campaign results, but not many can do the in-depth campaign analysis on a long-term basis. YouGov Re-Contact integrates clients' research with continual

follow-up surveys from their tracking results, allowing them to re-target a particular group of respondents who gave a specific answer on a previous survey. With this solution, our clients can uncover deeper diagnostics on the 'why' behind target audiences' behaviours and attitudes. Our single-source, proprietary panel can help clients to get in touch again with those who have seen their ad or heard buzz around their brand to understand on a greater level the specific messages they recall and the impact. It also helps to discover the drivers of their behaviour and barriers to using their product/brand.

Q. Do you have any new developments for online research?

We integrated blockchain technology into YouGov Direct. This creates both complete transparency of data use for our clients, providing necessary assurance, and an audit trail of verifiable transactions for our panel members.

In a GDPR and post-CCPA World, YouGov Direct also enables accurate and ethical consumer research targeting as panellists decide how much of their personal data they wish to share with advertisers and are compensated monetarily each time that data is used. A double opt-in process gives businesses complete peace of mind when conducting research – the YouGov Direct panel is ready and receptive to relevant surveys and research. Consumers are compensated for their opinions when they complete a survey. •



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ON THE MOVE

NEW GLOBAL CHIEF RESEARCH OFFICER AT TOLUNA



Susan Vidler
Toluna

Toluna has promoted Susan Vidler to the newly created role of Global Chief Research Officer. Vidler will lead Toluna’s global research teams and will be responsible for developing, defining, and implementing best practices across the research function.

Vidler joined Harris Interactive (acquired by Toluna) in 2007, and has held several roles throughout her tenure, including Research Director, Head of Financial Services Research, Head of Research, Managing Director of Harris Interactive UK, and most recently, European Chief Research Officer. Over the past 14+ years, Vidler has worked closely with clients to deliver leading consumer insights that enable them to make critical business decisions.

“Data-driven insights are at the core of what we do, and Susan has been integral in delivering the critical research and insights our customers need to drive business decisions. We are thrilled to have her now take on the role of Global Chief Research Officer and provide an even greater voice for our researchers around the globe,” said Frederic-Charles Petit, CEO Toluna. •

PURESPECTRUM CONTINUES APAC EXPANSION WITH NEW APPOINTMENT

PureSpectrum has appointed Lester Sualog, former Managing Director for System 1 Research and driving force behind SKIM Insights Agency, as Senior Client Development Director for Asia. He will be leading client development in the region.

With over 20 years of experience covering Southeast Asia and beyond, Lester brings both regional knowledge and experience to PureSpectrum. Lester is known for building partnerships with clients and MR governing bodies alike, focusing on cutting-edge methodologies and quality.

James Rogers, APAC Managing Director comments: “Lester epitomizes the talent excellence that PureSpectrum continuously looks to attract in APAC. As we gain momentum around our quality-focused Marketplace, end-to-end automation, and Insights Platform, we must bring tried and tested talent to lead from the front.” •

NIelsen APPOINTS NEW APAC PRESIDENT

The international leadership team at Nielsen welcomes new member Robert Gilby, who has been appointed the President of Asia Pacific (APAC). Tasked with driving new business opportunities and relationships and developing new media opportunities in the APAC region, Rob starts on 18 October 2021. He has a proven passion for the media industry, supporting the latest market innovations, and he has a deep appreciation of audience behaviour trends.

Rob is a global leader who has lived and led in APAC for over 25 years. He is based in Singapore, where he has had an extraordinary career, previously holding senior positions at The Walt Disney Company, Turner, PricewaterhouseCoopers, and advisory and board roles with the Singapore Ministry of Communications and Information, and its agencies.

“Rob’s appointment is a signal to the APAC media industry that we are committed to and investing heavily into the region. His experience will provide invaluable expertise to help support our growing client base to understand cross-media audience behaviours (through our global Nielsen ONE measurement vision), provide marketers with full-funnel search, interest and sales metrics and enable audience content discovery,” said Sean Cohan, Nielsen Chief Growth Officer and President, International. •



Lester Sualog
PureSpectrum



Robert Gilby
Nielsen



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