Qualified Respondents
17 million

Data Points
4 billion

Global Access

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Dear readers,

Welcome to the Q4 edition of Asia Research, 2017.

Our lead story examines the key developments in the online and research technology business in Asia (see Page 11). Based on interviews with the heads of some of the leading panel & research technology companies in Asia, we see that the ‘panel business’ is becoming more of a ‘data management business’, with organisations offering a much wider range of services beyond just panel management. With more surveys conducted on mobiles these days, there are also changes in the way surveys are being structured. These changes are designed to fit in with the busier lives people are leading and need to capture consumers’ online attention with more engaging surveys.

Toluna expands on the development of big data into new areas, including predictive answers and targeting (Page 14). ’Machine learning technology’ can help predict answers to questions from what is already known about the respondent, with the benefit of greater efficiency and reduced survey time.

We report on our Q3 breakfast seminar in Singapore, ‘Talking About Generations’ (Page 8). Four papers were presented that focused mainly on the Millennial generation, including how difficult they can be to predict in polling, with reference to the UK general election, and the new values that Millennials have in Asia. BDRC provides further insight and arguments into the ‘myths & realities of generational marketing’ (Page 19), arguing that this approach can be a distraction that results in missed opportunities.

We have an article from SKIM that discusses a framework to better understand why and how brands gain or lose in the marketplace (Page 15), and how to identify potential ‘white spaces’ for brands. Join the Dots addresses the classic question of ‘what is an insight?’ by making the point that we need to go ‘below the waterline’ to examine the human condition, emotions, and dynamics of consumer behaviour, and also to apply this understanding to benefit the brand.

Through the results of the recent Superbrands polling we report on the most favoured brands in Singapore (Page 8), and there is a review of the APRC Conference, which was held in the unique setting of Ulaanbaatar, Mongolia (Page 22).

Enjoy your read!

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Content Strategist and Director
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JOIN THE DOTS EXPANDS INTO THE US

Join the Dots has launched its second international opening this year, this time in New York. The UK-based company, whose revenue is set to break the £12 million barrier this year, is currently working with GSK and Shell in the US and Asia, and PepsiCo in America. The new US office will allow Join the Dots to service these clients and pursue new opportunities stateside.

The US operation will be headed up by Jeff Haselum, who has been promoted to Head of US Research. He has been with Join the Dots in the UK for nine years, latterly as Head of Research Teams, and has many years’ experience across qualitative and quantitative disciplines in a range of sectors.

Speaking about opening in New York, Group MD Quentin Ashby said: “Having successfully launched in Southeast Asia two years ago we are delighted to be branching out in the States. Our initial focus will be with our current clients but in time we will develop new business opportunities across North America. Jeff’s experiences gathered whilst performing his previous role as the Head of Research Teams makes him exceptionally qualified to take on this exciting role in the US and I know he is relishing the move.”

According to the company, Join the Dots has seen growth of twenty percent or more for the last four years and now employs in excess of 140 staff across its three offices.

Web: www.jointhedotsmr.com

TOLUNA ADDS DIGITAL TRACKING INTO ITS AUTOMATED RESEARCH PLATFORM

Companies can use Digital Tracking to obtain a deeper understanding of their customers with insight into Internet usage, how people use their mobile phones, and to obtain valuable new insight into consumers’ path to purchase. Digital Tracking intelligence fuels the development of more successful marketing, and product/service strategies.

Toluna’s Digital Tracking offering is a single-source permission-based solution that passively collects individual traffic and online behaviours in real time, from digital activities, media consumption, and ad exposure, to e-commerce activity at the SKU level. Digital Tracking can be used alone, or in combination with other research methodologies, and becomes extremely powerful when used in conjunction with branded communities.

“With the continued development of our Digital Tracking product, and now as we’ve integrated Digital Tracking into Toluna’s end-to-end Automated Platform, we are empowering consumer insights professionals to couple attitudinal and transactional data to deepen their insight, in real-time,” says Frederic-Charles Petit, CEO, Toluna. “This is truly revolutionary, and clients have quickly seen the benefit of this end to end Digital Tracking.”

“Our clients have been successfully leveraging Digital Tracking to learn more about their consumer’s path to purchase, digital audience insights and even in-app competitive intelligence – we’ve found the applications are virtually limitless,” says Tahai Ben Yosef, Vice President Digital Products. “Given the hyper-competitive marketplace conditions marketers face today, we’ve seen Digital Tracking truly transform their insights strategies and improve marketing success.”

Web: www.toluna-group.com

UNRULY LAUNCHES EMOTIONAL TARGETING CAPABILITY IN SE ASIA

Video ad tech platform Unruly has introduced a new targeting capability which helps advertisers across Southeast Asia connect with consumers most likely to emotionally engage with a specific ad.

Unruly Custom Audiences (UCA) uses data from the company’s content evaluation tool Unruly EQ™ – created using almost 2 million consumer data points – to target people most likely to engage emotionally with a specific video, leading to increases in earned media impressions, brand recall, and purchase intent.

UCA can also help marketers target light buyers of a brand, consumers who have a preference for competitors’ brands, and hard-to-reach, customised audiences such as business decision-makers and movie-goers. Campaigns using UCA have seen significant uplifts in campaign performance, up to +74% in brand favourability and +80% in purchase intent.

Have news to share? Send to prnews@asia-research.net

Did you find the nugget in the data yet?

DID YOU FIND THE NUGGET IN THE DATA YET?

I’m still looking. Can you help?

CevGant
Various clients of GroupM agencies across the region have been quick to adopt this new targeting technology. Ten clients have used the technology so far, including leading multinational FMCG, QSR, and automotive and financial service brands, across multiple markets, including Singapore, the Philippines, and Indonesia.

Matt Wigham, GroupM Deputy Head of Investment, APAC, said: “One of the key areas of focus for our business is to find innovative and ground-breaking solutions for our clients. Our clients are extremely excited to be able to trial and evaluate this new methodology for identifying and targeting key audiences at a campaign level to enhance the brand impact and drive greater returns in their campaigns. Data insights and targeting capabilities are core components of our agencies’ offerings enabled by [m]PLATFORM, and this partnership signals our intent to remain at the cutting edge.”

Unruly’s Chief Commercial Officer APAC, Phil Townend, said: “We’re really excited to be launching this ground-breaking solution for advertisers across Southeast Asia. For the first time, advertisers across the region can apply psychographic, emotional and bespoke targeting to their digital video buys. In today’s frenetic media landscape, brands that want success on social media and memorability at the point of purchase need to create and distribute contagious content that makes a deep emotional connection with their audiences.”

Web: unruly.co ■

**APP ANNIE LAUNCHES ANDROID METRICS FOR CHINA**

Mobile app data company App Annie has launched comprehensive Android app usage metrics in China. This allows the company to provide extensive data visibility into the world’s largest mobile app economy.

App Annie’s launch of Android insights in China now offers companies an independent, streamlined, and magnified view into how to measure success for their app business across all app markets. This had previously posed a challenge for the mobile industry, as the market is fragmented into app stores of different sizes and consumer bases, which made access to digestible, unbiased, and reliable data extremely difficult.

These new metrics will help companies truly gauge real mobile app usage behaviour in China from real-world users, empowering them to benchmark their success both in China and in international markets. Further, companies may now use these insights to: shape product development strategies based on high-performing apps in China, keep a pulse on the feature sets driving engagement, and benchmark against international peers to better understand their own performance in a global context.

“As a globally-focused company, we are very impressed by the impact the Chinese market has had on the mobile space and are devoted to providing the most reliable data into this market for our customers,” says Bertrand Schmitt, CEO and co-founder of App Annie. “China is a key leader in mobile and digital trends, and having independent and trustworthy insights into its mobile consumers is critical for businesses to build successful app strategies – both in China and internationally.”

Web: www.appannie.com ■

**ESOMAR REPORT: INDUSTRY SHOWS MOST SIGNIFICANT GROWTH SINCE 2010**

The annual ESOMAR Global Market Research Report shows that 2016 saw the most significant growth for the traditional global market research sector since 2010. ESOMAR, the international organisation for the research and insights community, announced that the global turnover of the traditional market research sector was US $44.5 bn in 2016, an increase of 2.3% after inflation. When combined with ‘new’ research methodologies, such as data analytics, the annual global turnover for research in 2016 was US $71.5 bn.

**ACROSS THE DIFFERENT REGIONAL MARKETS, WHERE WAS THE GREATEST GROWTH?**

Africa was the world’s fastest growing region, posting a net growth rate of 22.7% from the previous year. Nigeria showed an increase of 61% of like-for-like growth, and turnover on research in South Africa, the largest market in the region, was up by 17%. Asia Pacific saw a net growth of 7.8% after accounting for inflation. In recent years, growth in Asia Pacific was predominantly fueled by China, but Japan has recovered, reclaiming the position of the biggest APAC market. Latin America (excluding Venezuela), moved from a net decline of -7.8% in 2015 to growth of 1.6%. However, the largest markets saw some decline in growth: in the North American continent, growth was just under 1%, down from a net growth of 3.1% the previous year. In Europe, the net growth was 1.6%, down from 2.8% the previous year.

The five largest markets were:

<table>
<thead>
<tr>
<th>Market</th>
<th>Turnover US $ m</th>
<th>% of Global Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>19,487</td>
<td>44</td>
</tr>
<tr>
<td>UK</td>
<td>6,642</td>
<td>15</td>
</tr>
<tr>
<td>Germany</td>
<td>2,767</td>
<td>6</td>
</tr>
<tr>
<td>France</td>
<td>2,334</td>
<td>5</td>
</tr>
<tr>
<td>Japan</td>
<td>1,891</td>
<td>4</td>
</tr>
</tbody>
</table>

In 2016, 18% of the global research industry’s turnover was earned from international clients, up from 15% the previous year.
BULLISH GROWTH PROSPECTS FOR THE TOP 50

The trend of consolidation towards big players in the industry has continued and the top 10 companies continued to represent 47% of the total market in 2016. The total revenue for the top 50 companies was US $10,552.7 mn with a real growth rate (after an adjustment for inflation) of 4.6%.

The top 10 companies based on turnover were:

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Company</th>
<th>Turnover US $ m</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The Nielsen C.</td>
<td>6,309</td>
</tr>
<tr>
<td>2</td>
<td>Kantar</td>
<td>3,595</td>
</tr>
<tr>
<td>3</td>
<td>QuintilesIMS</td>
<td>3,301</td>
</tr>
<tr>
<td>4</td>
<td>Gartner Inc</td>
<td>2,445</td>
</tr>
<tr>
<td>5</td>
<td>Ipsos SA</td>
<td>1,981</td>
</tr>
<tr>
<td>6</td>
<td>GfK</td>
<td>1,667</td>
</tr>
<tr>
<td>7</td>
<td>IRI</td>
<td>1,027</td>
</tr>
<tr>
<td>8</td>
<td>Westat Inc</td>
<td>512</td>
</tr>
<tr>
<td>9</td>
<td>INTAGE Inc</td>
<td>441</td>
</tr>
<tr>
<td>10</td>
<td>Dunnhumby Ltd</td>
<td>429</td>
</tr>
</tbody>
</table>

SPENDING BY CLIENT SEGMENT

In the US, by far the largest global research market, the largest client segment of research was media and entertainment (25%), followed by pharmaceuticals (21%) and consumer non-durables (13%). In addition, in the US, 70% of all research spend was on quantitative, with 25% of spend going to online quant, 18% on digital automated research solutions, and 18% on qualitative research.

In the UK, the second largest global research market, the largest client segment was consumer non-durables (30%), followed by government and non-profit (14%) and telecommunications and ICT (10%). In addition, in the UK, 54% of all research spend was on quantitative, with 30% of spend going to online quant, and 8% on qualitative research.

Globally, the largest client segment of research overall continued to be consumer non-durables at 26% of the total research spend. However, this was slightly down from the 23% of 2015. The share for media & entertainment went up to 17% from the previous year’s 15%, as did research on pharma, up from 13% in 2015 to 14% in 2016, and government and non-profit with a 1 point share gain. Ad agencies doubled their presence from 2% to 5%. The financial services segment was down to 5% from 7% previously.

LOOKING TO THE FUTURE

Two-thirds of the countries contributing to this year’s report said that they believe that growth will continue. They acknowledge that the increasing role that legislation is now playing, such as the European GDPR and the Do Not Call Lists in the US and UK, will have an impact on how research is conducted in the future.

Two of the fastest growing areas have been social media monitoring and online analytics, with spending among social media networks up by 5%, and spending on online analytics up by 8%. In the future there will be even more of a need from business decision-makers for iterative, instant-streaming snippets of observations.

“In the race to the future, there are drivers, passengers and roadkill.”
Gary Hamel

BDRC Asia applies the most advanced research techniques to help clients become the drivers of change.

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piers.lee@bdrc-asia.com
www.bdrc-asia.com
MILO has been ranked as Singapore consumers’ favourite brand, according to the latest brand survey from Superbrands, which was conducted by the research agency BDRC Asia earlier this year, in September 2017.

The latest findings from Superbrands identified over 500 of Singapore consumers’ favourite brands across 107 consumer product and service categories. The brands were then ranked according to the greatest number of consumers identifying the brand as their “favourite brand”.

MILO narrowly beat local favourite Singapore Airlines to bag the top spot, with VISA in third place. Golden Village was the only other homegrown brand that made the top ten. Making its appearance in the top ten for the first time was the taxi-hailing app GRAB, which has achieved a huge leap in awareness in a relatively short period of time.

Singapore’s Top Ten Favourite Brands 2017

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MILO</td>
</tr>
<tr>
<td>2</td>
<td>Singapore Airlines</td>
</tr>
<tr>
<td>3</td>
<td>VISA</td>
</tr>
<tr>
<td>4</td>
<td>7 Eleven</td>
</tr>
<tr>
<td>5</td>
<td>Golden Village</td>
</tr>
<tr>
<td>6</td>
<td>Watson</td>
</tr>
<tr>
<td>7</td>
<td>GRAB</td>
</tr>
<tr>
<td>8</td>
<td>MasterCard</td>
</tr>
<tr>
<td>9</td>
<td>Samsung</td>
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<tr>
<td>10</td>
<td>Nippon</td>
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</tbody>
</table>

Mark Pointer, CEO of Superbrands Singapore, commented, “We commissioned third-party consumer research so that the selection of brands and their subsequent achievement of being recognised as a Superbrand is independent from the Superbrands organisation itself. The fact that these brands have been voted for by Singapore’s consumers as being their favourite brand, is a testament to the recognition and standing that these brands have achieved in the local market. These are truly exceptional brands that are at the forefront of consumer consciousness.”

Piers Lee, Managing Director of BDRC Asia, added, “The results of this survey represent a powerful endorsement of the brands and provide evidence of the remarkable standing that these Superbrands have achieved with Singaporean consumers. How a brand resonates with its audience and the extent to which the brand remains relevant in order to maintain brand loyalty is crucial. Great brands such as the brands in the Superbrands top ten list consistently deliver on this and that’s why consumers identify with them and think of them as their favourite brands.”

In addition to identifying Singapore’s favourite brands, the survey also looked at consumer perceptions of Superbrands in Singapore, where the logo is the most widely recognised brand award.

The research revealed that the overwhelming majority of Singaporean consumers (80%) said that they were more likely to consider buying products and services from a brand that had received endorsement from Superbrands.

76% of consumers are also more likely to try a brand for the first time when endorsed by Superbrands, as well as being more likely to recommend a brand to a friend (59%) and to consider switching from their current brand to try that brand (51%).

“The research results demonstrate that the Superbrands logo enjoys exceptionally high awareness and recognition in Singapore that is significantly ahead of other brand award programmes in the market. The logo does a lot to build brand equity, mostly in terms of its reputation, and significantly helps a brand to stand out from other brands in the same category. However it is the fact that consumers are much more likely to buy a brand endorsed by Superbrands or recommend it to a friend, that represents a very tangible benefit to brand owners,” added Mark Pointer.

Participation in the Superbrands programme is strictly by invitation only and it provides a Mark of Excellence and recognition that the brand has established the finest reputation in its field. At the same time it acknowledges the significant emotional and tangible benefits that the brand provides its customers and ultimately helps boost their confidence that they are making the right brand choice.

Brands participating in the Superbrands programme are entitled to use the Superbrands logo on their advertising, packaging, and other marketing and communications collaterals. The brand’s story is featured in the Superbrands reference book as well as on the Superbrands website.
Asia Research held its Q3 Singapore breakfast seminar in September: ‘Talking about Generations’. The seminar focussed mainly on the Millennial generation, but addressed a range of products and categories and discussed how the new generation of consumers is different. It was also the first seminar where Asia Research looked at political opinion polling.

Millennials are “the most studied and talked about generation”, and much of the interest in this age cohort is because they are a new generation in terms of their ‘spending years’ and hence are of interest to brands. The seminar attracted insightful papers from a range of independent global agencies.

Karen Schofield from Join the Dots presented a paper entitled ‘Millennials – are they who we think they are?’ Her paper discussed whether the ‘labels’ given to generations are useful or not. Karen argued that by understanding the macro-environment that people grow up in and the factors that shape their thinking and behaviour, brands can obtain a better understanding of their needs and, with it, the appropriate product offering.

Karen pointed out that Millennials are growing up in a different world, in which their spending years are taking place in the environment of the post-global financial crisis era. This means consumers have different expectations: for example, a switch from material possessions to a desire for authenticity, autonomy, and greater social-mindedness.

We need to understand what motivates people, including the need for happiness. In applying their Happiness Model to Asia, Join the Dots reassessed the Drivers of Happiness, and added Health and Security, aspects that were taken for granted in developed markets (e.g. in Maslow’s Hierarchy of Needs) but today have new meaning.

Join the Dots’ paper showcased a study they undertook among Millennials in Singapore and Hong Kong. These markets are thought to be quite similar in terms of the economy and business, but Hong Kong clearly has heavy Cantonese cultural influences, whereas Singapore is more multi-cultural.

Singapore and Hong Kong Millennials were compared using three main dimensions. First, Karen spoke about Achievement: Millennials in both markets have been brought up to be competitive and have gone through a challenging education system. But today, some status symbols are no longer so important. In Singapore, for example, “cash, condo, car, and country club” are being replaced by a desire for “creativity, compassion, confidence, and contribution”. In both markets, this manifests itself in a change of career aspirations, with Millennials wanting to work in start-ups, co-working spaces, and entrepreneurialism, following the idea of “determining your own direction”. Failure (often associated with start-up businesses) is also becoming more culturally acceptable.

The other dimensions were Meaning and Relationships. Millennials want to be heard more and to cause change. In Hong Kong, they are seeking more local identity and are willing to express this publicly, as has been seen in the political protests over recent years.

Millennials are finding it difficult to develop relationships in urban cities, and high living costs are having an impact on people’s willingness to get married and start families. Millennials are delaying marriage so that they can save, and Hong Kong has the highest proportion of Millennials in the world still living at home (84%).

The implications for brands are that they need to offer more freedom and flexibility, as well as ‘immersive experiences’. Self-expression is important, meaning that Millennials will back brands that allow them to express their opinions and provide a framework for sharing.

Examples of brands adapting to Millennials are Ascott Ltd, which provides co-living spaces designed for sharing, “designed by Millennials for Millennials”; C-Trip, a Chinese online travel agent that communicates the meaning of “freedom”; and Tiger Beer, with its “uncaged campaign” designed to resonate with Millennials.
SKIM presented a case study on the telecoms market. Lester Sualog presented a global study undertaken by SKIM, designed to gain a better understanding of Millennials within the telecoms category. His paper stated that the “universal truths” of Millennials are that they want “a good time”, “good looks”, “good friends”, and “good feelings”. They are always on the go; they often make quick “binary choices”, with few shades of grey.

This has implications for the way we need to survey Millennials. In wanting to understand their reactions to concepts, SKIM implemented mobile-based surveys that involve simple ‘swiping’, (e.g. swipe left for ‘not interested’ and right for ‘interested’), a bit like the Tinder dating app. Their approach also measured reaction time (e.g. a quick swipe means a definitive view), essentially tapping into the System 1 impulsive reaction which, apparently, is even more important with Millennials.

The conclusion of the study is that Millennials need their service providers to get the basics right, and they are very open to switching to other brands if the basics are not delivered. They certainly need strong visuals in the context of the message, and they reject plain-text advertising.

YouGov presented their paper on ‘The Unpredictable Generation’, again with reference to younger consumers and how it can be difficult to predict their impact on voting in elections.

Over the last two years, opinion polling has not had a very good record in predicting voting outcomes, particularly when the race is very close. The best examples are Brexit, Donald Trump’s victory in the US elections, and, more recently, the UK general election, where the incumbent government was expected to win a sizeable majority, but instead lost their majority and just about managed to hang on to power.

A lot of research has been undertaken into polling accuracy. For example, the Pew Institution in the US studied non-probability sampling and tested this with nine different online polling companies. Most of the panel companies use similar polling methods, but their accuracy depends on how vigorously they weight the sample.

YouGov used a different approach to predict the outcome of the UK general election based on a weighting method called Multi-Level Regression and Post-Stratification (MRP). YouGov predicted a ‘hung parliament’ (i.e. no party with an overall majority) three weeks before the actual result. Their approach received a lot of criticism, ridicule, and was even called irresponsible by commentators at the time. But they later needed to eat their words when YouGov became one of the only pollsters to get the election result right.

When the results of the election were in, the MRP approach had predicted the correct result for 95% of the constituencies contested on the day of the vote.

The YouGov paper explained that MRP is a “bottom-up” approach to weighting. It starts with the micro-geometry from individual constituencies and builds up a national picture, but also factors in historical data on voting behaviour.

With its analysis of the results, YouGov demonstrated that socio-economic class (SEC) is no longer a predictor of voting intention or political ideology, and in fact this has been somewhat reversed in recent years, with those of lower SEC actually voting more for the Conservatives. However, age is a huge predictor of voting intentions, with Labour attracting more of the youth vote; it was only the 40+ year-olds who managed to save the Conservatives.

The final paper from Piers Lee at BDRC Asia, ‘Generational Marketing – are we missing the point?’, was voted Best Paper of the event. Piers argued that generational marketing can be misleading, a distraction, and most importantly result in missed opportunities. Piers, who introduced himself as the oldest speaker at the event and said he was “standing up for the older generations”, argued that the obsession with Millennials is driven by the fact that they have grown up with technology, but technology is affecting all of us, and often different generations use it in the same way.

His most significant argument was that corporations are obsessed with Millennials as the new generation of consumers, but seem to be neglecting the older generations who, by virtue of aging populations, are far more numerous than Millennials, and also have far more spending power. More details of his paper can be found on Page 19.

In the post-event survey, 65% of attendees rated the ‘Talking about Generations’ event as ‘very good’ or ‘excellent’ (95% including ‘good’), and 72% said they were likely to attend future events.

For speaking and sponsorship opportunities at Asia Research events in 2018, please contact editor@asia-research.net
Asia Research recently concluded its annual review of the online and research technology business in Asia. This review involved conducting interviews with a range of industry experts who are the heads of some of the leading online panel and research technology companies operating in the region.

For 2017, we interviewed Martin Filz, CEO of Lightspeed; James Burge, Managing Director of Research Now; Ludo Milet, Managing Director of Toluna; Fumiya Nakajima, Global Business Director at GMO Research; and Mark Lepine, Managing Director of SSI.

Some of these companies are redefining their market position having moved from being ‘online panel managers’ to ‘survey technology providers’, and today positioning themselves as broader ‘data management companies’ whose work includes automation of insights and passive data metering. This demonstrates how far and how quickly these organisations have developed their product offering to include more holistic data collection, analytics, data delivery, and reporting solutions.

As we conduct these reviews, there are particular developments in the industry that define the year under review. In the opinion of our industry experts, one of the key developments in the industry in 2017 was the greater use of ‘combined data sources’. This includes fusing primary survey data from standard Q&A surveys with both passive data collection (online metering and geolocation) and data that might already be held on the respondents in the panel. For the latter, a lot of information can be retained about respondents from screening questions and past surveys, which can then be built up within a data bank to give far more insight into each respondent. For customer-specific surveys, clients can append additional data on customers (e.g. transaction history) to provide more insight into each customer, and there is the facility to combine this with information on customers from their social media (e.g. pop-up groups that they have liked).

All this additional profiling can help to identify segments more easily within panels, so that online surveys can be more targeted, with less screening out of respondents. This can bring down the costs of online research for very targeted samples.

This approach somewhat replicates the principles of ‘insight communities’, where data held from past surveys can be used to provide greater insight for subsequent surveys without the need to ask so many questions. As consumers get increasingly impatient with long surveys, this approach helps to reduce survey length and hence promotes greater participation in and completion of surveys.

While it has been slow progress to reduce the length of questionnaires, clients are becoming more aware of the limits of PC-based surveys. Martin Filz from Lightspeed comments that APAC has both a disadvantage and an opportunity, with local clients still transitioning from offline but jumping straight to mobile online and skipping PC. However, both established online markets and growing Asian markets face the challenge of cutting down either lengthy online trackers or offline questionnaires, and this is no simple task.

Lengthy tracking questionnaires can result in nearly all surveys being completed on PCs rather than mobiles, with obvious implications for lack of representation. Younger generations may only entertain surveys on mobiles, and this generally requires surveys of 10 minutes or less.

In order to reduce survey length, some organisations are opting for chunking (i.e. getting a respondent to do surveys in stages), or are just running multiple shorter surveys with balanced samples, with each survey addressing different elements of a study but with different respondents.

Fumiya Nakajima from GMO Research comments that mobile surveys are particularly important in Asia, and many solutions have looked at cutting up surveys into chunks, but looking at all these chunks as one whole survey.

Martin Filz comments that, for practicality’s sake, clients might opt for ‘least fill questions’. For example, within a broad U&A survey on financial services, when the survey encounters a respondent with an unusual financial product, the survey would focus just on this product so as not to bog them down with questions on the main-stream products, for which there will already be enough data from others taking the survey.

Martin also states the need for Modern Surveys which address length and compatibility issues, as well as incorporating passive and third-party data to limit the questions but maximise the insights clients need to answer the business objectives.

Mark Lepine from SSI comments that the move to shorter surveys cannot come quickly enough. Researchers are having to compete more and more for the online attention of consumers, so not only do we have to think about creating shorter surveys, but also more engaging ones by providing a better survey user experience for consumers in the same way as other online interface providers are doing.
Aside from technological developments, some comment that another defining characteristic of the online research business in 2017 is greater adoption of online research in general. Mark Lepine observes increased use of online methods in SE Asia, which has been traditionally associated with the dominance of offline data collection. Local, Asia-based panel start-ups are also helping to develop this business with homegrown panels.

**CHANGE IN BUYER TYPES**

A consistent finding in this year's review is the emerging range of new buyers of online research. Increasingly we see marketing personnel from client organisations bypassing their own insight departments to access consumer information directly from the panel/technology companies. Most of these requests are for very short, simple surveys, where the client need is for very fast feedback to aid tactical marketing decisions.

Ludo Milet from Toluna draws a distinction between the business they receive from end clients and that from research agencies. The end clients have ‘questions to answer’ (and very quickly), whereas the research that is channeled through insight departments and agencies tends to be ‘projects’ requiring considerably more thought behind the design and the analysis. Ludo feels that this ‘dual demand’ will continue, and the request for answers to questions from end clients will not kill the need for projects from insight departments and agencies.

For example, Toluna provides weekly feedback to a telecoms firm to understand the main motive of consumers who happened to buy a mobile phone that week in choosing their phone. This very simple survey tracks the hot selling points of mobiles at that point in time so that communications can be adjusted accordingly, or simply to provide insight for the client’s next marketing meeting.

In 2017, James Burge from Research Now observed increased use of video-based research. While online quantitative research traditionally maintains a certain distance between the client and the respondent (compared to qualitative research), greater use of video – such as through Voxpopme – provides clients with another window into consumers’ lives. These videos can almost be mini ethnographies, as we can actually see the respondent in their real-life situation. BDRC is using video to provide audits of mystery shopping through their BDRC Vision approach, as well as linking mini qualitative studies with standard online segmentation surveys, like with their research into TV news viewership with the BBC.

Ludo Milet from Toluna comments that another development this year has been far more automation of research. For example, product and concept tests that follow a very standard test protocol can be piped through programs with little human involvement in the survey. Toluna’s PowerConcept and PowerPack, which run on their own technology and panel, can deliver an end-to-end solution in 48 hours.

Mark Lepine comments that lower costs and more accessible surveys are opening up research to companies or institutions who previously could not afford it. They are providing similar end-to-end solutions, where clients can undertake a simple survey, select a sample type, and have it analysed without having to interact with any researcher. Similarly, Martin Filz comments on key developments for Lightspeed’s end clients, including user-friendly online reporting and access to data in the field which connects the brand to their data.

But again, it’s horses for courses – these solutions will not replace the full agency-based concept test where more complex purchase paths and nuances might have to be assessed.

**WHAT HAPPENED TO COMMUNITIES?**

Asia Research has frequently commented on the relatively low adoption of online insight communities in Asia, as reported in our client surveys earlier this year. Initial objections to insight communities from clients have included the costs, particularly in the set-up, but competition and price restructuring have addressed some of these concerns. However, Mark Lepine from SSI comments that insight communities are being compared directly with other online methods and are still viewed by some clients as expensive. Mark comments, “Clients need to be informed that insight communities require a lot of time in management and moderation, making it quite labour intensive. But the value from insight communities is enormous.” He continues, “Perhaps what is missing are local case studies that can really point to the benefits of communities over traditional research, including qualitative methods. With some experimentation and growth in expertise, I see no reason why communities cannot be as popular in Asia as they are in the West.”

For communities to work in Asia, Fumiya Nakajima at GMO Research again comments on the importance of mobile. For example, asking panelists to perform tasks on PCs will not work in Asia, but if the online community platform can be adapted to mobile then it can work well in Asia.

The challenge in Asia is that many clients’ budgets are simply not large enough to keep a panel engaged. We also spoke to Karen Schofield from Join the Dots, who are active in this area. She points out, “for an ongoing online community to really be a ‘community’ rather than a more traditional panel, we need to be having regular conversations with our members, talking to them at least a couple of times a month, and ideally more often”. While client-side researchers who focus on a specific market often have sufficient research needs to generate this level of engagement, clients who have responsibility for insights across multiple SE Asian markets can find this more of a challenge, since they focus on different markets at different times, depending on the business’s needs.

In this scenario, short-term ‘pop-up’ communities in the markets of interest can be an alternative, as they are set up to meet a specific set of objectives over a fixed period (e.g. 1–4 weeks). Karen comments that communities are actually a very flexible tool and can be scaled up or down as needed, and a short-term community can be a great way of showing the value of an online, longitudinal approach to internal stakeholders, without the need for a long-term commitment.

Martin Filz from Lightspeed comments that a potential solution is in the sharing of insight communities across different clients. For example, an insight community can be developed for a specific category (e.g. sportswear), but different brands can tap into this community for a range of studies.

However, as touched on at the beginning of this article, the online panel companies are now using their own panelists as a form of
managed community (e.g. learning more about them across various types of survey), and hence these panelists can be utilised in the same way as insight communities. In Australia, for example, Martin states that Lightspeed’s own panelists are being invited to take part in online bulletin board research over a two-week period, making them in a sense a type of short-term community.

This could be the trend for insight communities in Asia, where they are not brand specific and will be ‘owned’ by either the research agency or the specialist panel companies.

THE B2B OPPORTUNITY

While still in their early days, B2B panels are gaining some traction in Asia, but Mark Lepine comments that there is a bit of a “chicken and egg” issue here. In order to grow and maintain B2B panels there needs to be the demand, but there is low demand due to lack of B2B panels. Currently, much of the demand is coming from outside the region where global B2B studies need to be extended to Asia.

Indeed, it was global demand that helped develop consumer online research in Asia, often cross-subsidised by Western investment, and this trend seems to be repeating itself for B2B panels. These panels are sometimes developed from consumer panels, where job titles and functions can be verified through LinkedIn profiling as an additional quality check.

ARTIFICIAL INTELLIGENCE

A bit like ‘big data’ five years ago, artificial intelligence (AI) is one of those buzzwords that the research industry is talking about. But what does it really mean and what are the implications? We put this question to our industry experts. Martin Filz from Lightspeed feels that AI fits in with appended data insight on the target audience so that it does not require additional questioning. This can include looking at correlations – so, for example, a particular consumption habit can imply other habits without even needing to ask the question (e.g. wine drinkers are almost certainly also cheese eaters), and unless you need an exact figure on the incidence, the correlation itself can be enough information for some clients.

AI can mean understanding consumers through other data sources, such as social media profiling or information held from past surveys. Future surveys could be a series of ‘micro-surveys’ made up of two questions asking a ‘what’ and a ‘why’, and the AI will tell you the rest about who they are. Ludo Milet from Toluna sums up AI as “analysing data without even collecting it”, but human judgment is still needed to determine whether these are quality insights or not.

James Burge from Research Now thinks that AI can power more standard analysis and insight generation that can feed into end-client tools and dashboards, replacing the more mundane tasks covered by researchers today.

But will AI kill the industry? Overwhelmingly, the answer is no! Fumiya Nakajima at GMO Research says that, while there are digital and automation providers, “the knowledge and expertise of extracting the ‘why’ is our asset held by the traditional research industry, so I believe there is a way we can mutually find a way to collaborate – the power of asking and analysis is the only way to obtain real insight from the enormous data”.

James Burge comments that some agencies are growing towards more strategic research, and this opinion is also held by Martin Filz, who states that the industry will still need “the best people for seeing the nuggets in the data, and researchers are best placed for doing this”.

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Technology continues to empower marketers to improve the efficacy and personalisation of messages. Data informs targeting capabilities and insight supplements understanding. This insight has become more critical as marketing teams need to understand the ‘why’ behind the ‘what’, making survey research increasingly important. To address this need, market researchers are often looking for ever more targeted individuals to participate in survey research.

Take, for example, an insights professional planning a survey of 1,000 people who drive a specific make and model of motorbike and live in the London area. A traditional survey approach would be to send the survey to 200 people who have been pre-identified by a research panel and ask many more about their ownership of motorbikes in order to try to get the 1,000 motorbike owners. While this is a longstanding practice, it runs contrary to achieving speed to insight, not to mention that it does not improve upon the survey experience.

The good news for market researchers who face this problem is that help is on the way.

Machine learning technology is emerging that will help online survey tools predict the answers to questions like “Do you own a motorbike?” The technology teaches computers to learn from experience — learning from data without relying on a pre-determined equation as a model. Machine learning algorithms adaptively improve performance as available sample numbers for learning increase.

Machine learning has an expanding presence in marketing, such as in online advertising as a tool for making digital campaigns more targeted and personalised. Another way marketers leverage machine learning is in customer experience applications to identify patterns among customer interactions to increase revenue opportunities. Market research is a natural extension of this technology trend.

With machine learning, survey platforms can learn and predict properties of users based on their answers to other questions and on demographic and profile data similarities to additional panelists. The technology enables insights professionals to rely less on asking questions to qualify respondents, which means less wasted time and resources. It aligns with respondents’ expectations that researchers already have knowledge about them and don’t need to ask basic information questions which can turn them off.

To return to our motorbike example, machine learning will enable surveys to primarily target people who are likely to have a high chance of owning a motorbike, even though they have never specifically answered the question. Based on this learned intelligence, a survey will simply ask respondents to verify this fact as they enter the survey, reducing the number of people rejected and boosting panel satisfaction because the survey is attuned to their profile.

Machine learning addresses a challenge that is impossible to handle with traditional heuristic-based approaches; these methods would not perform well and would be impossible to scale. Survey panels can run into millions of users, with each panelist having thousands of data points — potentially billions of data points in total. Machine learning techniques address this scale issue to learn about panel users based on their activities and then predict their answers to questions.

In examining the ways in which machine learning can advance market research, Toluna has used an open-source library developed from Google to investigate and compare a number of learning algorithms. Our research shows that this technology can help improve targeting significantly. Survey design will continue to first look for people who match the target and then look for people whose predicted answers match the target. We expect this new process will reduce panel fatigue significantly. It will also help drive more completes per survey panel and require less capital expenditure for each survey.

Machine learning technology shows great promise in market research. It can learn from huge amounts of data to generate insights and predict answers without asking irrelevant questions to panelists, improving respondent experience and survey results.
BRAND DRIVER ANALYSIS – UNCOVER WHAT DRIVES BRAND VALUE IN YOUR MARKET

By Juan A. Tello, Senior VP Americas, SKIM & Ajay Chourasia, Senior Manager Asia, SKIM

Most brands rely on a brand tracker to monitor the health of their brand and competitors over time. While these trackers can lead to insights about trends affecting your brand and your competitors, they usually explain very little about causality, how and why a brand shifts position over time. To better understand brand health, marketing researchers can turn to brand driver analysis to extract more strategic insight from the tracking data that your company has already collected. This article will cover a framework to better understand why and how a brand gains or loses ground in the marketplace, to define what should be strategic points of difference and points of parity for your brand, and to identify potential white space opportunities in the market.

HOW TO STRUCTURE A BRAND DRIVER ANALYSIS

The first step in this framework is to identify the brand equity attributes that collectively describe the dynamics of the category and the positioning of all brands in the market. To capture a broad spectrum of the market, a large set of attributes is tested in a brand tracker. Ordinarily, many of these attributes are highly correlated and can be clustered into 15 to 25 consumer underlying dimensions, which can then be assembled into a hierarchical model. Constructs at the bottom level tend to include more functional performance-related variables – for example, reliability, portability, product quality, ease of use, and fair price. These subsequently drive other constructs found at a higher level which are more emotional and/or holistic in nature, such as customer service, product performance, and value for money.

The initial list should include both functional and emotional items, since both are involved in decision-making, and the clustering process may reveal important interconnections between them. It is important to list attributes that are also relevant to your brand’s competitive set. This method can produce an accurate picture of an entire market, as long as the appropriate data representing all market players is included. For example, a company may decide not to use their existing brand tracker data because it does not fully capture novel and disruptive benefits of newcomer online competitors. Instead, they may field a new study with an enhanced and broader list of attributes covering different market spaces.

An important step in the analysis is to define which variable to use as a proxy for brand health for a given industry. There are many options and it is often not obvious which is the right choice: purchase intent, overall performance rating, likeability, uniqueness, loyalty, or likelihood to recommend. We recommend conducting an external study to determine the best metric for your brand.
By overlaying brand drivers and attributes owned by brands, marketers can easily identify the relevant strengths of their brands, threats from competitors, and opportunities to expand their brands' identities. Brands can also define strategic points of parity and difference vs competition. We typically look at differences by segment to determine whether differentiated strategies might be appropriate for different groups. One obvious choice is to split by age cohort or any other demographic variable. Heavy users of a product might be compared to light users. Consumers can be divided by frequency of shopping trips or preferred shopping destinations. These segments can then be compared on the basis of other variables. For example, segments can be mapped across a malleability index, a measure of how difficult it is to change brand perceptions within each segment. Brands can then identify opportunities for growth if a particular group is found to lack a strong attachment to any particular brand within a category, or if another group of consumers has not fully formed a set of associations with your brand.

### THREE DELIVERABLES

Marketing researchers who turn to this method should look at concluding with three deliverables. The first deliverable is a brand ladder. It shows a full profile, with both strengths and weaknesses, for one brand at a time. This ladder visualises how the brand is perceived in the minds of consumers. The brand ladder can be used to see which important attributes are owned by the brand, as well as the attributes in which the brand shows a weak association. At a glance, the brand ladder can inform us about the attributes that are driving the brand’s performance or the lack of it.

The second deliverable is the market opportunity ladder. This ladder visualises available opportunities in the market. It combines all brands in a market, but it only displays ownerships. Weaknesses are not incorporated, but white space opportunities – attributes that are not currently owned by any brand – are visible. It can be used to identify which attributes are solely owned, co-owned, and not owned in the overall market and how impactful these are on brand health. It helps to guide brand strategy towards points of parity and points of difference for the brand to own. At a glance the market opportunity ladder can be used to conduct an opportunities and threats analysis for the brand.

Finally, a contribution bar chart offers a traditional ranking of brand drivers, in terms of how impactful they are on brand health. All of the visualisations discussed up to this point are descriptive, but this method also has predictive ability through market simulations. If the analysis identifies customer service as an unclaimed white space, a scenario can be simulated to assess the gains in overall brand health of moving into that space vs the risks of a competitor claiming it first.
WHAT IS AN INSIGHT?

By Karen Schofield, Managing Director at Join the Dots, Singapore

It’s widely agreed in the market research industry that just asking people their opinions isn’t enough to provide insight. I could give you a list of reasons why this will only result in top-level, conscious feedback – we post-rationalise, lie to ourselves, aren’t conscious of why we behave the way we do, etc – but I’m sure you’ve heard them all before. ‘Findings’ – i.e. the things that people say (and think) they do – are just the tip of the iceberg. What lies beneath the surface is where we discover insight.

Insight goes beyond direct question and response. Below the waterline is where you start to really discover your consumer: things about the human condition, emotions, and the dynamics of what really influences behaviour and choice.

Take website usability – a ‘finding’ might be when people tell us they want a big red button to view their basket. An ‘insight’ will explain why they’re completely blind to and distracted from the big red button that’s already there, because their eyes are drawn to the striking visuals of cars, hotels, or other goods which are significantly more eye-catching than the functional aspects of the site we’re testing.

It’s difficult to pin down a single view of what an insight is because different people, including our clients, have wide-ranging definitions. These can depend on a business’s knowledge of the category, the issue they are trying to understand, or even the level of sophistication about consumers within that business.

One of our clients, for example, defined insight as a “penetrating discovery about consumer motivations that can be applied to drive growth” – an interesting perspective which places important on the application of the information as much as its depth.

So while there’s no universally agreed upon definition of an insight in research, we’d suggest ticking most, if not all, of these boxes:

1. Does it explain a consumer or an aspect of human behaviour better?
2. Is it just data or have you subjectively applied your researcher’s point of view to interpret it?
3. Is it true and relatable, without being completely redundant and overly obvious?
4. Will your client/stakeholder be able to buy into it?
5. More importantly, will the organisation or brand benefit from it?

So we’ve broadly ‘defined’ our elusive insight. But now we know what we’re looking for, how do we find it? Well, of course it varies, but here’s one real client example in which we used behavioural economics (BE) as a lens for research design, analysis, and to identify insights.

Our client, a national restaurant chain, wanted to explore how consumers make decisions about what to order, in order to optimise their menu items and menu design. We turned to BE because we know that in-the-moment choice is an incredibly difficult thing to pull apart and reflect on in a post-rationalised way. BE starts with a very simple proposition which many market researchers have already instinctively bought into: that what people say they do and what they actually do can often be two very different things!

We tasked our participants with carrying out self-ethnographic restaurant visits, using a mobile app to film their experiences of navigating the menus and ordering, which we then combined with post-rationalised through depth interviews and co-creation sessions conducted with our self-ethnographers.

By creating a list of heuristics and biases which we expected we might observe in the self-ethnography, we were able to identify which ones were at play during the decision-making. This meant we could virtually observe the mental shortcuts which reduce consumer stress and effort and significantly impact decision-making, and we observed a lot of them. By speaking to our participants in detail after the self-ethnography, we were able to play back what we’d observed to them, telling them what we saw (and what they may not have been aware of), creating a pleasantly disruptive dynamic for both our interviewees and our analysis, and really unpicking what influenced them in the moment.

We determined that many customers were heavily influenced by ambiguity bias and risk aversion, where the non-traditional layout of dishes on a menu and the vocabulary used meant people tended to stick with ‘safe’ options, or dishes they knew would potentially bring a more favourable outcome. We also learnt that, in the moment, herd mentality kicks in, and many customers were influenced more by who they were dining with or what they saw others eating than by the menu itself. In addition, many customers took what they perceived to be greater risks (in this case choosing less familiar dishes) when their perception of safety increased, such as when the occasion was deemed less important.

Insights like these (e.g. that people don’t actually choose curries over ramen because of the taste, but rather because they’re deemed a safer option for reasons they can’t articulate) encouraged our client to think about their menu differently, from the design, language, and visuals they used, to how technology and in-restaurant theatre could help consumers better navigate their offer.

So there isn’t necessarily a single definition of what an insight is, and no set way of discovering one, but whatever definition you use, an insight should help explain behaviour, be relatable, and be something you or your client can benefit from. Otherwise it might be just a finding.
DOES LANGUAGE BIAS MARKET RESEARCH?  
WHY PICTURES ARE MORE PRECISE THAN WORDS

By Neil Gains, TapestryWorks

The standard model of market research has relied on language as the main medium for understanding behaviour for more than 100 years. But recent discoveries in psychology and behavioural economics suggest that behaviour is driven more by emotions than reason, so is language still the best medium for communication in research (or in marketing more broadly)?

TapestryWorks recently undertook research on research to understand the impact of different stimuli, verbal and visual, on human responses to the same set of questions. Our focus was on the motivations underlying women’s perceptions of beauty, and we ran the same study across four different countries: Australia, Indonesia, Thailand, and the UK.

The findings are revealing about the use of verbal vs visual stimuli. In all, we tested 36 concepts relating to beauty goals, through verbal and visual representations of the concepts. The verbal versions were in English for two markets, and carefully translated (and back-translated) into Bahasa Indonesia and Thai to ensure that the full meaning of the concept was captured as closely as possible in the local language.

We also tested different sets of visual stimuli. A set of Western visual representations of each concept was tested across all markets. Additionally, we tested a third set of stimuli in each market, using Indonesian visual representations of the concepts in the UK and Indonesia, Asian visual representations in Thailand, and a multi-cultural representation in Australia. Each set of stimuli comprised 36 concepts, representing 12 overall motivational segments (based around TapestryWorks’ proprietary StoryWorks® model).

The results are fascinating. Starting with our verbal stimuli, there was a high degree of agreement about the single most important goal of beauty: confidence. The word ‘Confident’ (percaya diri in Bahasa Indonesia, meaning ‘believe in yourself’; and มั่นใจ in Thai, meaning ‘stable heart’) was by far the most popular choice of verbal concepts, chosen by 63% of women in Indonesia, 55% in the UK, 53% in Australia, and 49% in Thailand. Does this mean that confidence is really all there is to beauty, and does it really mean the same thing around the world?

The second, third, fourth, and fifth verbal choices trailed far behind in their popularity and had much less agreement in terms of the choices that were made. By contrast, the top five choices of visual concepts were completely consistent across the four countries, although they were given different rankings.

‘Confident’ remained the most important concept in Indonesia and the UK, but other options were closer in popularity. The first and second choices in each country clearly show the difference between Western and Asian beauty culture, with ‘Confident’ and ‘Powerful’ being the top two choices in Australia and the UK (‘Powerful’ was the number one choice in Australia), while ‘Confident’ and ‘Hopeful’ were the top two choices in Indonesia and Thailand (with ‘Hopeful’ being the number one choice in Thailand).

So which set of responses gives a more accurate representation of beauty goals? Given the very strong bias towards ‘Confident’, the answer depends on how you interpret the meaning of ‘Confident’ and the emotions associated with it. Below are three pictures that were first choice in at least one of the four countries. They are very different versions of ‘Confident’ that reflect the different priorities of women in Australia, Indonesia, Thailand, and the UK.

What accounts for the differences in responses to verbal and visual stimuli? Firstly, verbal stimuli force us to engage the rational brain in finding the right answer, encouraging explicit rather than implicit responses (implicit responses give a truer picture of emotional goals). Secondly, verbal concepts can be very broad and flexible, spanning many ideas across many contexts or situations. This makes them useful communication tools, but less precise for understanding real behaviour, especially where the local language has a smaller vocabulary (than English, for example).

This leads to the third and most important reason: verbal concepts can span multiple situations, with very different emotions and needs, and it’s only when a context is made clear that the concept becomes more precise.

For example, in TapestryWorks’ experience of beauty in Indonesia, the more formal meaning of confidence (i.e. transformation, glamour) is only relevant on special occasions such as parties and weddings. While these are very important to women’s perceptions of their own beauty behaviours, they only represent a small slice of their normal everyday beauty behaviours, which are associated with different emotions and goals.

‘Confidence’ is a catch-all term for the emotions associated with feeling beautiful, but as a catch-all it can mean different things to different people in different situations in different cultures (ignoring any issues of translation). TapestryWorks believe that visual concepts have much greater specificity and therefore provide much more accurate cross-country comparisons.

Visual stimuli do not need to be translated and, in our survey, the choices of images were much more consistent across the different stimuli sets than were the verbal stimuli. A final advantage is that images are processed quickly and intuitively by people, providing a very simple, quick, and engaging question that takes less than a minute in a survey.

Image choices revealed the subtleties of cross-cultural differences that were obscured by responses to verbal questions, which were much less clear. It’s time for research to get more visual and learn to use the power of pictures to understand the emotions, cultural values, and contexts that drive human behaviour.
Generational marketing has become almost a default segmentation for some brand owners. Most of the consumers in the market today are found within the generations born since World War 2 (i.e. after 1945). Names have been given to distinct segments that have emerged over this period, including 'Baby Boomers' (born 1945–1964), 'Gen X' (born 1965–1979), 'Millennials' (born 1980–1999), and ‘Gen Z’ (born 2000 or later).

In order to get a better understanding of these consumers and how to market to them, stereotypes and ‘pen portraits’ have been developed for these generations that can be crudely summed up as follows. Note that these are very much in a Western context.

‘Baby Boomers’ (born 1945–1964):
These consumers grew up during a period of sustained economic growth following World War 2. Such fortunes allowed governments to subsidise education with free universities, and consumers benefited from huge appreciation in the value of their homes over their lifetimes, allowing for comfortable retirement for some.

The Baby Boomers were the first true TV generation, making it easy for brands to communicate with them, and it was this generation that lived through the Sexual Revolution with all the associated liberalisation of attitudes to sex outside of marriage, homosexuality, and even recreational drugs.

Sometimes called the ‘latchkey generation’ because kids would come home to empty homes after school, this generation saw a breakdown of marriage, and with more female participation in the workforce, kids needed to look after themselves more than ever. Kids were free to wander around their neighbourhoods completely unsupervised, and they grew up with MTV (music TV) and the development of the pop video, which some say created a generation of cynical, disaffected adolescents.

But the ‘forced self-sufficiency’ in their childhood paid dividends later on in life, with many Gen Xers going on to have successful careers and some starting their own businesses.

The most studied generation ever, Millennials have grown up with technology and are wedded to their mobiles and social media, which have come to replace ‘real’ relationships.

There are mixed views pertaining to the work ethic of Millennials, with some claiming that they are lazy, impatient, and entitled, while others say they are working harder than any other generation before them.

‘Gen Z’ (born 2000+ or possibly earlier):
Gen Z are curators of online information, and corporations will only be able to communicate with them via content, visuals, and particularly video, some of which Gen Zers will share with friends, making ‘word-of-mouth’ marketing even more powerful than before.

They will be, or already are, the most ethnically diverse group, born of mixed marriages, with more educated overseas or within multi-racial classrooms.
They are inheriting a world with a hangover. They will need to deal with enormous national debt and look after an aging population while the numbers of their own ranks able to pay for the care of the elderly diminish. They will also need to deal with the impact of decades of environmental degradation. If the Gen Zers are the ones to fix these problems, they certainly have their work cut out!

But to what extent do these stereotypes apply to Asia? Some believe that the generations in Asia are somewhat shifted compared to the West. For example, the Millennials in Asia can show similar characteristics to Gen Xers in the West, and Asian Gen Zers to Western Millennials.

But in contrast to the West, many of the emerging Asian markets are seeing generations becoming ‘better off’, for example through more democratic governments, less corruption, more foreign direct investment, and growth of their own indigenous industries and brands, resulting in a growing middle class.

WHY THE OBSESSION WITH MILLENNIALS?

As ‘the most studied generation ever’, Millennials have been targeted by some organisations with very specific product propositions. For example, Air France have launched a new airline called Joon, with in-flight services designed around technology and a cabin service designed for “an innovative and offbeat experience”.

But the obsession with Millennials leads to distractions, and the issues are often misunderstood or taken out of context. The reality is that technology impacts all generations, and often in the same way. For example, people who use the shared economy through apps are using it for the same reason. A Baby Boomer using a taxi-ordering app is doing so for the same reason as a Gen Xer and a Millennial (i.e. they need to get from A to B quickly) – there’s nothing generational in this!

Developing products and services for specific generations based on these stereotypes can tell a much larger audience just to ‘go away’. For example, will 40+-year-olds think of Joon if this airline is continually shouting about being for Millennials? And even among Millennials, supposing the product proposition disappoints them? If a brand or product overtly targets a particular audience, it is harder to please them and much easier to disappoint.

The obsession with Millennials also ignores the realities of populations. Sometimes I get the impression that corporations think that anyone over 55 years old is about to die, but people are living longer than ever. In Singapore, people older than Millennials account for two-thirds of the population, and this will grow to nearly three-quarters by 2025. 55+-year-olds will represent 40% of the market by 2025. The reality of these demographic changes is also affecting other SE Asian markets, such as Thailand, which is on a similar trajectory to Singapore.

With this in mind, would it not be better to develop an airline proposition for an aging population? Why do so many clients not want to sample consumers over 55 years old?

WHERE IS THE EVIDENCE?

BDRC Asia looked at various categories to see whether or not generational marketing actually works. One area in which BDRC undertakes considerable research is the travel sector. In 2017, we conducted a global survey of air passengers through our Media GPS (Global Passenger Survey). One aim of this survey was to establish travellers’ motives for leisure trips. Within SE Asia (including Singapore, Malaysia, and Thailand), Gen X and Baby Boomers generally had similar motives for travel, the top three being to see family, for relaxation, and to see and explore landscapes. Millennials showed similar motives to the others, although they were less likely to want to travel to see family; indeed, they might even have been looking to get away from their families when they travelled!

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**Main Reason for Leisure Trip - Millennial comparison by region**

![Image showing the main reason for leisure trip comparison by region for Millennials, Gen X, and Baby Boomers.](image)

![Image showing the top 3 priorities guests have for selecting hotels for leisure trips.](image)

![Image showing the top 3 priorities guests have for selecting hotels for leisure trips.](image)

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**Source:** BDRC GPS study, Q4 2016

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**Source:** BDRC Hotel Guest Survey, 2016
But when we compare across nations, the differences are far more contrasting, particularly between the West and Asia. When we look at Millennials specifically, Western Millennials are far more motivated to travel to see family. Sightseeing and shopping are more motivating to Asian Millennials compared to their counterparts in the West.

With reference to the BDRC Hotel Guest Survey (a survey that examines the key motives for people's choice of hotels), in SE Asia we see Millennials having more in common with Baby Boomers, both putting 'good value' and 'free access to Wi-fi' in their top three considerations for choosing their hotels. Gen Xers, on the other hand, have completely different considerations in their top three. In China, the generations’ needs for hotels are quite different and do not follow much of a pattern.

Across the generations, Japanese hotel guests consistently put 'location' in their top three considerations, with 'value' and 'trust-worthiness' also being relevant to two of the three generations. Australia has remarkably consistent needs across the generations, with 'good value' and 'affordable luxury' always being the top two.

Based on this evidence, we would not recommend generational marketing to the travel sector. Far more effective segmentations of this market are based on the circumstances of the travellers, which then translate into the needs of the hotel guests. Hotel 'residences' and 'apartments' are designed for longer stayers, as they have a more homely feel, including in-room kitchen facilities. Not only do these services provide pragmatic solutions for longer stayers, they also reach out to all generations.

But a far smarter way of determining the needs of a traveller is at the point of booking. The online travel agent (OTA) is now one of the leading methods for booking hotels. But with so many OTAs to choose from, each OTA needs to be able to shortlist the hotels that people really want, otherwise these inquirers will just become browsers with no sales. It is essential for the OTA to put a range of appealing hotel propositions within the first one or two pages so that the client will then go on to book, and the OTA can get their commission.

The needs of the hotel guest can be worked out quite easily. For example, weekend dates for a room for two people in a city location are likely to suggest a couple looking for a city-break holiday. This in itself can determine the type of hotel likely to appeal to the couple, who might spend relatively little time in the hotel room during the day, but want comfort, privacy, and a bit of luxury at night.

While generational marketing has obvious applications in some areas (e.g. anti-aging cream and retirement), if age is going to be used as a proxy for assessing needs, then 'life stage' might be a better measure. The needs of a single person in their early 40s can be far closer to those of a single person in their 20s than a couple of the same age. Pre-family couples have more spending power and tend to go out more. Families have specific needs, such as child-friendly, informal eating outlets when they dine out, or TV channels in the home. Empty Nesters can behave like pre-families when they lose the burden of providing for children, and have more disposable income and want to relive their youth!

But it is the understanding of the context or circumstances of the individual consumer regardless of their age that will result in the best products and the highest sales conversion rates. ■
In September this year, the APRC 2017 Conference was held in Ulaanbaatar, Mongolia. It was a two-day event consisting of presentations, workshops, ‘trend sharing’, and case studies. The APRC 2017 Conference brought together the experiences, cases, methodologies, and techniques of marketers, branding agencies, market research companies, and experts from all over the world on: co-operation of brand owners, market researchers, and other stakeholders, and advantages of understanding the insights of markets and customers for creating strong brands, exploring the local market, and entering the international market. At the conference, new trends in market research, technological solutions, and methodologies for MR, and possibilities for usage of MR results for marketing strategies and planning were introduced.

Section One of the conference was titled ‘Explore Local, Lead Global’. Andy Zhao, MD of North East Asia, GfK Consumer Choices, kicked off the segment with a presentation about the Market Research Industry Development in China and Asian Developing Countries. Next, Victor Yuan, Chairman of Dataway Horizon, spoke about the Global 1985s Phenomenon and New Brand Opportunity. Bum-Erdene, CEO of MMCG, emphasised the Importance of Collaboration in Building Effective Consumer Research, before the session broke for a coffee break. After 30 minutes of synergistic networking, delegates returned to a Brand Growth Story: Journey to Top Global Player from Local Giant, told by Yang Jungyul, CEO of Kantar Insights Korea. Atsushi Yamamoto, Director of Global Marketing at GMO, and Pavel Vilensky, Marketing Manager at Wakoopa, concluded Section One with insights on Online Shopping Behaviour in Asia.

‘Growth Hacking’ was the topic in Section Two, where speakers focussed on digital, technology, and the IoT. Shen Hao, President of CMRA, opened the session by articulating the current trend and development of Market Research in China. A joint presentation by Kantar Insights was next, talking about Unlocking Growth through Insights Technology. Just before tea break, Debrah Harding, MD of MRS, gave an update on the New European Data Privacy Laws, and Dave McCaughan, Chief Strategy Officer of Ai.agency, spoke about using artificial intelligence platforms for undertaking market research. To wrap up the section, Dr Huh Chung-Ling presented on Big Data in Social Media being the New Trend of Marketing.

Datin Kala Sethu, President of MRSM (Market Research Society of Malaysia), commented, ‘APRC showcases the strong support system present in the ‘APAC’ marketing research community, which is vital in this fast evolving digital world. The host MMRA (Mongolia Market Research Association) had gone the extra mile to deliver a memorable conference and summit. Mongolia’s population is only 3 million but over 300 participants registered for the conference. Amazing!’

The conference ended with a one-day cultural programme for delegates, with visits to various scenic attractions in Mongolia.
The Research & Results 2017 show was yet another highly successful event, with close to 180 exhibitors from more than 20 countries. In keeping with the show’s motto, “Insight Innovation”, the event organiser put up an ‘Innovation Area’ for the first time this year. In this area, exhibitors presented the most innovative trends and tools in the industry.

The Innovation Area was the highlight of the show, with topics like chatbots, virtual reality, language tools for analysing the mood of test subjects, recording intuitive assessments, and social listening with the aid of NLP, just to name a few.

With the increase in providers, tools, data collection, and analysis methods, market research is becoming ever more complex, and that complexity and diversity was reflected at Research & Results 2017. With 104 workshops, the programme covered the entire spectrum of the market research world and informed the participants about the latest trends in the industry. GfK, Kantar TNS, Ipsos, and Nielsen – four of the world’s top five market research institutes – had booths at the show this year, but there were also various start-ups, online providers like Research Now, SSI, and Toluna, as well as mid-sized institutes and market research associations on the exhibitor list.

The workshops provided the latest perspectives on the industry’s leading topics, such as customer experience, big data, online panels, implicit tools, and mobile. For example, GIM showed how you can use implicit methods to get inside the heads of consumers. Also, Produkt + Markt presented their mobile approach to shopper insights research. Some exhibitors made use of the workshops to present new tools.

Alongside the extensive workshop programme and widely diverse exhibitors, Research & Results 2017 also offered networking opportunities to meet with industry peers in an informal atmosphere. For instance, the Research Club held a Networking Party on the first evening and the exhibition organiser invited visitors to a Happy Hour on the second day.

Research & Results 2017 had a huge turnout with exhibitors from around the world, driving the growth of the show on an international level.

Research & Results 2018 will be held on October 24 and 25 in Munich. Let’s go, Germany.

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**WHY MOBILE?**

Touch consumers on-the-go and in-the-moment with dataSpring’s mobile research panels in Asia

25% of research participants use mobile to respond to surveys

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<th>Millennial Smartphone Owners</th>
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Mobile Survey App Features

- **Response Velocity**
  With In-App Survey Notification, you can instantly remind panelists whenever a new survey opens and get responses faster.

- **Powered Tracking**
  Target respondents with IDFA/AAID or Cookie to get accurate results on your ad’s performance.

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  Connect to over 100,000 active proprietary panelists in APAC countries via any device. You can control which devices can be used to enter your survey.

- **Expansive Coverage**
  Choose from over 47 profiled variables to find the “right” respondent for your research.

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THE PUSH FOR FLEXIBLE WORKING IN ASIA

The newly published 2017 Gender Diversity Report from recruitment expert Hays has revealed that flexible working is highly sought after by employees in Asia. The report, which is based on a survey of workers from 30 industry sectors in China, Hong Kong, Japan, Singapore, and Malaysia, has revealed the importance of flexible working to both men and women, and warns employers that they ignore this push for flexibility at their peril.

THE PROS AND CONS OF FLEXIBILITY

For many companies, traditional office working might seem like the easiest option. Having all employees work within set hours makes communication simpler, avoids misunderstandings, and ensures that everybody is doing what is required. However, flexible working options – such as flexible start and finish times, and opportunities to work from home – can bring a whole raft of benefits.

Allowing employees to choose when and where they work gives them the freedom to plan their own time and demonstrates the company’s trust in them. According to Singapore’s Ministry of Manpower, this can boost staff morale and productivity, and help to retain staff who might otherwise be turned off by a more rigid, office-based structure. Agnes Chan, EY’s managing partner for Hong Kong and Macau, says, “The younger generation of employees are more in favour of the gig economy and they like… more flexible working hours instead of a full-time commitment.” If companies want to attract and keep these kinds of employees, flexible working could be the answer.

ALL GENDERS WANT TO WORK FLEXIBLY

The key findings of the 2017 Gender Diversity Report reveal that both men and women are on the lookout for flexible working. Many workers are keen to fit their careers around their personal lives, especially when they have young children or elderly relatives to look after. Of those surveyed in mainland China, 37% approved of flexible hours for parents, and this was reflected by 34% in Malaysia, 29% in Japan, and 26% in Hong Kong.

However, it isn’t just women who are looking for the flexibility to fit work around parenting. Lynne Roeder, Managing Director of Hays Singapore, says, “Flexible working is still seen very much as something that benefits working mothers but our latest research shows that companies developing flexible work policies have to take a broader view.”

The Hays survey found a clear desire among men for access to flexible working options. In fact, more men than women rated flexibility as important, and 50% of men said they already have access to flexible working (compared to only 40% of women). However, most of the respondents said that, when a child is born, fathers receive less leave than mothers, and 31% of respondents in Malaysia said that fathers are not offered leave at all.

The major advantage of offering flexible working to parents is that it can help to break down gender barriers. Lynne Roeder stated that a large proportion of respondents “are supportive of seeing more shared family responsibilities… as a way of breaking down gender bias and improving gender diversity.” 45% of the women and over one-third of the men surveyed agreed that this sharing of responsibility would have a positive effect in the workplace and help to dispel unconscious biases.

IS FLEXIBLE WORKING THE WAY FORWARDS?

Flexible working has become more available in Asia in recent years, but many companies are wondering whether it is simply a fad, and some are even returning to the traditional office-hours structure. Lynne Roeder says, “I would urge businesses to think about why they started offering flexibility in the first place.” Companies who have attracted employees with flexible working options could find themselves in hot water if they take them away. “For workers in skill short areas,” says Lynne, “organisations that offer flexible working can often beat the competition to an employee’s signature.”

The Hays study also revealed that there is less fear of flexibility among employees. Although most respondents felt that flexible working could have some negative impact on their careers, only a few described this impact as being “very much” a problem. It seems that for many, a slight career setback is worth the potential improvement in quality of life.

Thanks to the proliferation of digital technology, it is easier than ever for companies to provide flexible working options to their staff. There are also no hard-and-fast rules, so if a company is having problems, there is always room to compromise. For example, projects that require close teamwork can still be carried out in-office, leaving the more flexible work to be done remotely.

However companies choose to act upon this trend, the evidence is clear: flexible working is hugely desirable among employees in Asia, and offering it could help to attract and keep the most valuable workers.
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THE NPD GROUP APPOINTS NEW PRESIDENT

Information and advisory services provider The NPD Group has appointed Gerhard Hausruckinger as Group President for Europe and APAC. A former member of the Management Board of GfK, Hausruckinger also held the position of interim CEO last year during a GfK management change. In his new role, he will be based out of Europe and will report to NPD CEO Karyn Schoenbart.

During his seven years at GfK, Hausruckinger drove strong organic growth and successfully implemented major changes to account and quality management systems and operations in his area of responsibility. Prior to joining GfK, he was CEO of emnos, a loyalty analytics business in six countries. Before that, he was with Accenture as an Executive Partner.

“Gerhard has successfully led a global organization and has extensive experience in retail and consumer businesses, which are NPD areas of focus,” said Schoenbart. “As we grow our business in Europe and APAC, we need continued strong leadership to ensure that we are maintaining the superior quality that our clients expect from NPD even as we continue to transform our business with the addition of new analytic solutions to complement our core measurement services.”

“I am excited to join such a dynamic company with an outstanding reputation for leadership,” said Hausruckinger. “NPD is known for its industry expertise and impressive growth trajectory. I’m looking forward to working with the team to continue to broaden the portfolio, bringing new services to new markets.”

Hausruckinger will succeed Michel Maury, who joined NPD in 2007 and led the very successful expansion of NPD services in Europe and Asia during the past 10 years. Maury will stay on with NPD until March 2018, at which time he plans to retire. During this period he will focus on the APAC region and work with Hausruckinger to ensure a seamless transition.

METRIXLAB APPOINTS NEW MD FOR GREATER CHINA

Digital research agency MetrixLab has appointed former Nielsen exec Brady Ni as Managing Director for Greater China. Brady replaces Edwin Song, who takes up a new regional role in Asia to support the growing needs of these markets.

Brady brings 14 years’ experience in market research to this key post. Most recently, he was Vice President of Nielsen Greater China, heading up a 100-strong team, overseeing client and business development across the region. His sector expertise spans FMCG and Retail, Financial Services, and Healthcare. He has earned a reputation for his dedication to both excellent execution and client service.

Commenting on his new role, Brady said: “The passion and dedication that MetrixLab has brought to the research industry is awe-inspiring. I’m really thrilled to be joining the team that is pioneering digital research. In particular, I am looking forward to growing the operation in Greater China as more companies see the benefit of working with this dynamic world-class research agency.”

Jan Willem Gerritsen, MetrixLab Executive Officer, said: “Brady is an extremely energetic and impressive leader. As well as his impressive industry experience, he has a keen focus on our commercial performance. I’m delighted to have him driving our future growth in this exciting and rapidly expanding marketplace. Together, Brady Ni, Edwin Song and our Singapore Managing Director Rob Valsler, are a formidable leadership team spearheading our growing in Asia.”

APP ANNIE HIRES NEW MD FOR ASIA PACIFIC

App insights agency App Annie has appointed Cindy Deng as Managing Director for Asia Pacific. She will be responsible for the company’s customer-centric efforts and go-to-market strategy in the region.

Deng comes with more than 18 years of experience in digital advertising, data management, data analytics, and enterprise technologies for major Fortune 1000 companies across the CPG, auto, finance, travel, and technology industries. In her most recent role at Turn, she was responsible for the overall P&L, strategies, and daily operations of Turn’s business in Asia Pacific.

“From day one, we have had a keen focus on Asia Pacific, and the region currently accounts for more than 40 per cent of our global business. Drawing on her vast experience and leadership abilities will be key as we continue to scale and deepen our investment in a comprehensive solution — from our product suite and customer success to training and professional services,” said Bertrand Schmitt, CEO and co-founder of App Annie.

“From an industry perspective, we are at a tipping point of change as more brands turn to mobile. Companies need independent and trustworthy insights into their mobile consumers; this is critical for businesses to engage with their customers and build successful business strategies,” said Deng.

ON THE MOVE

The NPD Group

Gerhard Hausruckinger, The NPD Group

Cindy Deng, App Annie

Brady Ni, MetrixLab

www.asia-research.net
The sails of the Elbphilharmonie are a technical marvel: 1,000 plate-glass panels, heated to 600°C to curve, bulge, or pucker, each imprinted with a seemingly random pattern of metal dots that change colour in response to the shifting light.

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