Healthtech in Asia

Recovery Through Optimism

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<table>
<thead>
<tr>
<th>Company</th>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>2CV</td>
<td>James Redden</td>
<td>+65 9230 0729</td>
<td><a href="mailto:james@2cv.com">james@2cv.com</a></td>
<td><a href="http://www.2cv.com">www.2cv.com</a></td>
</tr>
<tr>
<td>BDRC Asia</td>
<td>Piers Lee</td>
<td>+65 6970 9571</td>
<td><a href="mailto:piers.lee@bdrc-asia.com">piers.lee@bdrc-asia.com</a></td>
<td><a href="http://www.bva-bdrc.com">www.bva-bdrc.com</a></td>
</tr>
<tr>
<td>GMO Research</td>
<td>Atsushi Yamamoto</td>
<td>+81 3 5456 3244</td>
<td><a href="mailto:request@gmo-research.jp">request@gmo-research.jp</a></td>
<td><a href="http://www.qmo-research.jp">www.qmo-research.jp</a></td>
</tr>
<tr>
<td>SKIM</td>
<td>Paul Janssen</td>
<td>+65 6939 8018 ext. 102</td>
<td><a href="mailto:p.janssen@skimgroup.com">p.janssen@skimgroup.com</a></td>
<td><a href="http://www.skimgroup.com">www.skimgroup.com</a></td>
</tr>
<tr>
<td>People Data Company, Inc.</td>
<td>Greg Lipper</td>
<td>+65 9832 6472</td>
<td><a href="mailto:greg@peopledatocompany.com">greg@peopledatocompany.com</a></td>
<td><a href="http://www.peopledatocompany.com">www.peopledatocompany.com</a></td>
</tr>
<tr>
<td>Toluna</td>
<td>Oleg Safine</td>
<td>+61 412 306 663</td>
<td><a href="mailto:Oleg.Safine@Toluna.com">Oleg.Safine@Toluna.com</a></td>
<td><a href="http://www.tolunacorporate.com">www.tolunacorporate.com</a></td>
</tr>
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MEDALLIA LAUNCHES SINGAPORE DATA CENTRE
Customer experience management agency Medallia has accelerated its investment across APAC by opening its Singapore Data Centre. A global business and connectivity hub, Singapore is a priority market for Medallia.

“Medallia is investing across the APAC region, supporting expansion and helping our customers drive growth by understanding and managing customer, employee, and citizen experiences,” said Gavin Selkirk, APAC Vice President and General Manager, Medallia. “The Singapore data centre plays an integral part in ensuring we deliver on the data security and regulatory requirements of businesses who are scaling up customer and employee experience programs. We already have customers using the infrastructure and it will become the default location for many of our Asian customers.”

NEW GLOBAL BUSINESS CENTRE IN MALAYSIA FOR CLARIVATE
Innovation insights agency Clarivate has launched a Global Business Centre in Penang, Malaysia. It is one of three new Global Business Centres that Clarivate is building to provide world-class services to customers, with the other two based in Chandler, AZ, USA and London, UK.

Located at GBS@Mahsuri, Bayan Baru, a hub for global business services in the city, the Penang Global Business Centre will become the primary centre for Clarivate shared services in Asia. Recruitment has already kicked off and Clarivate expects to employ approximately 350 at this centre.

Shankar Nagalingam, Clarivate Vice President for the Global Business Centre in Penang, said, “Known as the Silicon Island of the East for its industries, Penang is an ideal location for building a Global Business Centre. The city offers us access to a great global business centre landscape with

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good infrastructure and connectivity, along with an impressive talent pool. Moreover, the Malaysian and Penang governments are very supportive of our plans for increasing local employment opportunities.” •

**NIELSEN FAN INSIGHTS NOW COVERS SOUTHEAST ASIA**

Nielsen has enhanced its Fan Insights platform to enable better visibility into the interests, media consumption behaviours, brand attitudes, and purchasing habits of sports fans around the world. Expanded country coverage and new reporting capabilities, including enhanced Crosstab functionality, empower global sports properties and brands with critical data and actionable insights to inform smarter decision-making around sponsorship, fan engagement, and media rights investment.

The robust Nielsen Fan Insights platform now includes data for 26 of the world’s most dynamic sports markets. Newly added are the six largest Southeast Asian economies of Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam. Data for Australia, Canada, Mexico, Poland, Turkey, Saudi Arabia, South Africa, and the United Arab Emirates (UAE) is also now available. These new countries complement Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, the UK and the US, which have been available since 2019. •

**KANTAR EXPANDS NHWS TO SOUTH KOREA AND TAIWAN**

Healthcare data and analytics provider Kantar Health has expanded its National Health and Wellness Survey (NHWS) into South Korea and Taiwan. NHWS is the world’s largest patient-reported outcomes survey and provides a unique patient perspective into health needs and experiences.

Over 40,000 patients and caregivers in South Korea and Taiwan will join the survey, increasing the global sample size to 250,000 patients across 12 markets, which already include Japan and China. In its 23rd year of reporting, NHWS covers 200 medical conditions using validated research instruments and disease-specific measures.

NHWS also has the flexibility to uncover timely, synergistic insights around global healthcare events through Pulse recontact surveys. The survey found that the proportion of patients reporting symptoms of moderate to severe depression in South Korea almost doubled from 16% to 30% since the start of the COVID-19 pandemic. This is similar to the US, where moderate to severe depression symptom rates increased from 14% to 22%. In comparison, the proportion of respondents reporting these symptoms in Taiwan, a country which has been widely praised for its response to the pandemic, did not significantly change during the same period. •
A total of 190 surveys were conducted, including clients, suppliers, and support companies. This sample included 52 managing directors and another 38 directors, providing a good ‘top-down’ view of the industry.

The survey shows that COVID-19 has had a big impact on the industry, with 24% of supply-side and support companies stating that their firms have already made redundancies. There are notable differences between the global research firms in Asia, and the local companies headquartered in Asia. The global agencies are more likely to have made redundancies or intend to make more (43% vs 26% of Asian agencies), while the Asian agencies have resorted more to reducing salaries of staff.

This indicates that Asian agencies and their staff are taking a more flexible response to the crisis that will give them the advantage on the recovery in terms of having retained staff. Asian agencies (which tend to be smaller) have also been able to downgrade their offices during the crisis (31%), whereas only 18% of global agencies have been able to do so, e.g. they are locked into longer and more expensive leases.

During the lockdown, and with fewer projects to manage, many agencies have increased their staff training. Global agencies have increased training internally, whereas Asian agencies have used external training firms (maybe lacking internal resources), and more Asian agencies are looking into further training in the second half of 2020.

### Impact on suppliers and response to COVID

<table>
<thead>
<tr>
<th>Impact / response so far (to end August 2020)</th>
<th>Expected impact / response (to end of 2020)</th>
<th>Net impact /response in 2020*</th>
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<tbody>
<tr>
<td>Staff working from home</td>
<td>95%</td>
<td>80%</td>
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<tr>
<td>NET: CUTS</td>
<td>53% Including</td>
<td>80%</td>
</tr>
<tr>
<td>Reduced salaries</td>
<td>39%</td>
<td>62%</td>
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<tr>
<td>Reduced benefits</td>
<td>32%</td>
<td>43%</td>
</tr>
<tr>
<td>Redundancies</td>
<td>24%</td>
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<tr>
<td>NET: MORE TRAINING</td>
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</tr>
<tr>
<td>Inhouse training</td>
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<tr>
<td>External training</td>
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<td>In sourcing of services</td>
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<td>Onshoring, to protect jobs</td>
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<tr>
<td>Offshoreing, to reduce costs</td>
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<table>
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<td>26%</td>
<td>10%</td>
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*Either impacted / responded so far or expected by end of 2020

Global = Multinational or global group agency

Asian = agency HQ in Asia
**Shorter-term prospects**

Three-quarters of MDs in our survey had developed business/strategic plans during the lockdown – one in five expect to invest more in licensing products, e.g. IP, platforms, enhanced reporting software, etc, and a similar number intend to use external training companies to develop their staff (in addition to one-third of companies who will increase internal staff training).

On balance, there are more firms that intend to insource and onshore services, particularly among the global research firms. This can be used as a measure to protect jobs, but 24% of companies expect further redundancies in the second half of 2021; this is offset by 26% expecting to make new hires, indicating a mix of restructuring or shifts in employment between different types of research supplier.

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We asked clients in our survey what would put a research vendor ‘in the consideration set’ for new projects in the next year. Compared to the last stakeholder survey in 2018, competitive pricing has shot up the rankings in consideration, and team members/leads have dropped down the list. Having a track record of undertaking similar projects and a reputation in their field of research (e.g. methodology) remain of high importance to clients. Being a ‘big name’ and the familiarity of the agency to the internal clients remains of stated low importance, but these can be much higher subtle drivers of importance,

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especially given that the multinational agencies are the most commonly used type of research vendor among the clients surveyed.

That said, when asked who would be the gainers and losers among their research suppliers in the next year, clients are more likely to drop the multinational agencies. With price becoming more important, clients are also more inclined to engage panel/data management companies directly, but prospects for the more specialised research agencies also look better.

**Longer-term prospects**

The short term, i.e. the next year, will continue to be tough for the research industry. 52% of clients expect their research budgets to be lower in 2021 than in 2019, vs just 11% stating they would be higher (the remainder being the same or could not say). However, as a result of COVID-19, 44% of clients state that research/consumer insight is gaining status in their organisation vs 26% stating that it is losing status (30% state no change).

When weighing up the balance of opportunities and threats in the research industry, a net +2% of stakeholders see more opportunities than threats. This is higher than those we surveyed outside of Asia (albeit a small sample), where a net 26% see more threats than opportunities.

The main opportunities for the research business are summed up as follows (% are those who rank the opportunity in the top 3 out of 10):

1. Leveraging on technology (48%) – this has ranked number 1 since 2015 and involves more use of online research
2. Faster turnaround/more agile research (47%) – a new measure for 2020, this can be related to ‘1’ above, but will also need to include faster and more iterative reporting
3. More value-add research (41%) – defined as providing greater insight, this has been in the top three of opportunities for the industry since 2015
4. New research methods (34%) – can include big data, new qual, neuroinsights, etc; also in the top four since 2015

The main threats are as follows (% are those who rank the threat in the top 3 out of the 10). NOTE: for threats, there are more significant differences in perceptions between clients and suppliers (less notable for the opportunities):

1. Clients scaling back on research (62%) – rising from third place in 2018, the absolute amount spent on research is expected to fall, and this was confirmed by clients in this survey when asked about their expected budgets for 2021
2. General economic uncertainty (44%) – also rising in saliency (sixth in 2018), although clients are less likely to cite this as a threat (33%)
3. Clients using low-cost, tech-based solutions to replace mainstream research (43%) – number two in 2018 and still salient today
4. Price pressure (35%) – specific to open tenders and procurement, although clients rate this less as a ‘threat’ (23%), but this will not affect them negatively!
5. Clients undertaking more research in-house (35%) – clients rate this much higher at 53%, perhaps because they know they are going to do this!
Conclusions

The fall in optimism for the research business has been highly influenced by the prevailing economic conditions, with many companies having to lay off staff and expecting to do so for the second half of the year. Clearly this is dampening the mood of the stakeholders.

What is clear is that the rate of change for the industry is accelerating. 51% of the stakeholders state that in the next five years the industry will see ‘big changes’ in terms of the type of research organisations there are in the market, including 8% stating that the kinds of research departments and suppliers present today will no longer exist. This compares to 38% when we conducted the survey in 2015.

For the more immediate term, e.g. 2021, the research industry will be lower in revenue, but clients will have higher demand for insights in a more changeable world. They will be investing in faster, more tactical research, and are likely to postpone investment in reassessing their segmentation partly due to cost, but also because the market remains volatile and uncertain, which could make these new models obsolete again.

Suppliers have already made significant cuts to their overheads, and there will be more pain to come. Encouragingly, there is still some hiring going on, with 34% of suppliers already hiring or intending to hire new staff, and making efforts to retain staff through more flexible work arrangements and a net insourcing of services.

Suppliers might need to emulate what clients are doing and to focus on their existing clients and business, i.e. ‘customer-centricity’ and ‘enhancing customer experiences’. They are also taking steps to invest in new IT and the licensing of new products. They see a greater need for faster, more agile research, but clients seem to be more satisfied in these areas. There will need to be a change in the way agencies report data, with clients looking for better data visualisation than the ‘storytelling’ that was more in vogue a few years ago, but with agencies seeing this as a higher priority.

Clients also report that consumer insight is, on balance, gaining status in the client organisation. While we might need another year to ride out this dreadful storm, we can still tell our children that consumer insight is a worthy profession to go into...

Asia Research would like to thank Toluna for hosting the survey and data processing.

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The rapid growth of the healthcare industry in Asia is largely due to the emergence of healthtech, which is the use of technology to advance the practice of medicine. Healthtech, which constitutes technological advancements such as medical wearables, centralised databases, medical applications, artificial intelligence (AI), and mobile advancements, among others, is a constantly growing and evolving industry.

The digital healthcare industry in Asia Pacific is predicted to be one of the fastest growing in the world, and it is estimated that by the year 2025 it will be valued at US$80.7 billion. The bulk of this projection is attributed to the aging population in the Asian region, who will significantly benefit from the advancement of digital healthcare as it offers them convenience and ease in seeking assistance from medical professionals.

Wearable medical devices

Today, we are already seeing many patients in Asia with pre-existing conditions, especially the elderly, being equipped with wearable medical devices. For example, patients diagnosed with diabetes are fitted with continuous glucose monitors (CGMs), small, wearable devices that allow for the constant monitoring of a patient’s blood sugar levels. This information can be easily transmitted to one’s smartphone or smartwatch and shared with medical professionals or the patient’s carer.

It is understood that medical wearable devices, which are fitted with microchips and sensors, will reach US$ 61.4 billion globally in the next five years. It is expected that Asia Pacific will account for approximately US$ 3.2 billion of the market share, which will be significantly contributed to by China, India, and Japan. While the figure appears small, the CAGR is indicative of a 25.52% growth from 2020, reflecting significant growth in the Asian market. Globally, a 10-year forecast (2018–2027) of the industry’s growth shows a CAGR of 13.8%, with North America being a major contributor to the growth of this industry.

However, these figures are predicted to see further growth, especially since the digital healthcare industry within the Asia Pacific region, in both developed and developing countries, has seen exponential growth due to the prevalence of COVID-19.

Telemedicine

Many Asian countries have also deployed telemedicine as a way to mitigate the spread of the pandemic. Mobile applications, such as Dr World, Doctor Anywhere, Halodoc, and others, have made waves across the region as they have allowed people to receive assistance from doctors via video calls. However, this is not a recent phenomenon as telemedicine has gained traction in the past few years, and COVID-19 has further developed its growth.

Back in 2018, it was reported that Halodoc, a telemedicine application from Indonesia, was receiving “several thousand consultations a day” and had 2 million users. Today, in the face of the pandemic, they have more than 7.2 million users, with a 300% increase in their mobile application downloads. Similarly, another telemedicine application, Alodoktor, reported an increase of 50% in its users.

To ease the bottleneck that its virtual doors were facing due to the pandemic and the Indonesian government’s urging for its citizens to avoid going to hospitals unless it is an emergency, the team at Halodoc created a dedicated COVID-19 section, which featured the use of an AI chatbot to assist patients who were worried about COVID-19. The use of this technology allowed Indonesians to receive the information they needed instantly, without having to wait for a doctor to attend to them, thus freeing up doctors to deal with more important cases.

The prevalence of telemedicine is not just limited to Indonesia or its neighbouring countries, but is also happening across Asia in developing countries such as Vietnam, Thailand, and others. Some of these countries may be new to the concept, such as Vietnam, but they have seen a significantly positive reception from their people, signifying the potential of this generally untapped industry.
Artificial intelligence

When it comes to the use of AI, this technology is not just limited to chatbots or mobile applications. In fact, in the Philippines, AI has been utilised in the development of a Robot Roving Doctor (Rovidoc) in place of a doctor, as the country has tried to minimise COVID-19 exposure for its doctors.

Interestingly, in Wuhan, China, the epicentre of the virus, the government launched a hospital that was operated by robots and utilised internet of thing (IoT) devices. Deploying AI, patients wore wearable medical devices that reported their temperature and vital stats, and these were monitored by robots that alerting the human medical team if anyone needed immediate medical attention. Disinfecting, medicine dispensing, food services, and even information services were all provided by the robots, thus limiting any unnecessary human exposure to the virus.

The success of this field hospital in China, as well as the Rovidoc in the Philippines, is indicative of things to come across Asia as technology develops. As it is, we are already seeing the use of AI in surgeries, and in aiding doctors to make medical diagnoses quicker and more efficiently. With the presence of 5G technology and IoT, the intricacies surrounding the use of AI in the healthtech industry will become further refined and more widespread.

Healthtech is the future of medicine

Moving forward, Asia will witness phenomenal growth and transformation in its healthcare industry as technological advancements pave the way for the growing healthtech industry. The reception of these upcoming changes will have been unintentionally tested during the pandemic, which has seen many, young and old, embrace and adapt to the changes in the healthcare industry.

While North America, China, and South Korea are the largest esports markets in the world, the audience for esports is also expanding into other markets, with the COVID-19 pandemic only accelerating this growth. During March–April, more than 1 billion people viewed an esports event. Twitch is estimated to have grown its audience by 31% in March alone.

While the numbers are huge, what is truly impressive is the diversity of the audience who now engage in esports. By being centre stage, esports has been able to reach out to a whole new set of eyeballs ranging from mobile gamers to sports enthusiasts.

This is a significant change – previously esports found it challenging to attract mainstream audiences, with most of its growth coming from PC and console gamers who wanted to further engage with the games they love.

However, COVID-19 has opened up the world of esports to mobile gamers, different demographic groups, and even new markets. The following are some trends which have brought about this change.

Esports betting

Esports betting has been one of the biggest catalysts for wider audience growth. With virtually all major (non-gaming) sporting events cancelled during the initial months of the pandemic, esports took centre stage in the betting arena. Esports betting sites like Luckbox and Unikrn saw record-breaking numbers, traditional sites like Bet365 and DraftKings introduced esports-specific products, and even some casino operators and physical bookmakers began taking bets on popular esports tournaments.
Betters appreciated and responded to these new developments. A study that we did (in collaboration with ProdegeMR) with 1,068 gamblers in the UK found that 36% of gamblers bet on esports during the height of the pandemic. Our research also showed that 22% of non-esports betters will consider placing a bet on esports in the next three months.

While there has been some pull back as live sports have returned, analysts believe that the increased awareness of esports betting, plus its inherent advantages of being quick (short game sessions) and constantly available (no off peak), will help maintain its appeal among gamblers. We estimate that the esports betting market will double from $7 billion in 2019 to $14 billion worldwide by the end of this year.

Blurred lines between live sports and esports

It was not only betters who were missing the action – the lack of live sports has been keenly felt by fans worldwide, a lot of whom structure parts of their lives around sporting schedules. Sports associations/organisations worked quickly to fill the void by introducing a variety of esports initiatives. Formula 1 flagged off its virtual Grand Prix with active Formula 1 drivers participating, while the Bundesliga in Germany organised a FIFA 20 tournament involving esports professionals and professional football players. The response to some of these events was astounding. Over 30 million tuned in to watch 19-year-old Dani Berezny beat established F1 drivers such as Lando Norris and Nico Hülkenberg in virtual racing tracks all over the world.

With live sports slowly coming back, such collaborations between the real and the virtual have naturally subsidised. However, not only have these tournaments introduced sports enthusiasts to esports, they have also increased sports star engagement with the industry. Football stars such as Gareth Bale and Antoine Griezmann have recently founded or invested in their own esports teams. With increased star support, the interest among sports fans in esports is expected to continue.

Increased brand support

The increased number of eyeballs on esports brought with it new advertising opportunities. While the lack of live stadium esports events has hurt the esports industry, it is still expected to grow 9.9% to $844 million this year. Along with endemic brands (HP, Intel, etc), new brands and categories (FMCG, auto, etc) are dipping their toes into esports and gaming in general and are thereby creating new customer engagement opportunities.

Chipotle has partnered with skateboarding superstar Tony Hawk, giving customers who order Hawk’s favourite burrito access to a demo version of his video game. Hawk will also appear on Chipotle’s Twitch page to engage with fans and promote the brand. Chicken wing specialist Wing Stop has a Twitch ordering extension, allowing customers to continue gaming while creating their order.
FEATURED

Meanwhile, **BMW** initiated sponsorship deals with five of the world’s leading esports teams in April.

As more brands engage with the esports ecosystem, awareness and engagement among a wider set of consumers is bound to increase.

**The rise of mobile esports**

While esports was primarily the domain of PC and console games, recent years have seen mobile esports titles play an increasingly larger role in the industry, bringing with them a slew of new potential viewers. The advocated lockdown that most people had to go through during the pandemic has only hastened this trend.

China: While China has been very active in esports, it has mostly been dominated by male viewers and participants. With mobile’s rise to prominence in esports, China’s massive base of 473 million female mobile gamers has begun to participate. During the pandemic, 98% said that they spent more time on gaming – this increased engagement also resulted in a 75% to 100% increase in mobile esports viewership among this audience.

India: Long known as the sleeping giant in gaming, India is waking up from its slumber to engage in mobile esports, with the pandemic providing consumers with the time to participate. The ESL India Premiership, India’s flagship esports tournament, saw an 1,866% increase in participation and a 325% increase in watch time; while Gamerji, an Indian mobile esports platform, registered a spike in its daily active users from 15,000 pre-pandemic to 50,000 currently.

This increased focus on mobile esports will continue to appeal to mobile-first consumers and help bring more casual gamers into the ecosystem.

While the esports growth engine continues to chug along, the springboard that COVID-19 has provided will resonate long after the pandemic recedes.

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**RECOVERY THROUGH OPTIMISM**

**By Piers Lee, Managing Director of BVA BDRC Asia**

**How consumer and business morale can help build economic recovery**

Most economies go through periodic downturns, and the road to recovery is partly built upon improving consumer and business confidence and optimism. Asia has benefitted from quick recoveries from crises in the past – e.g. the 1997–98 Asian Financial Crisis and even the Global Financial Crisis – characterised by ‘V-shaped’ rather than ‘U-shaped’ recoveries for some markets.

Today we are waiting to see how economies will recover from the lockdown period for COVID-19 – a highly unusual type of recession which theoretically should see a quick rebound. The issue, though, is that the severity of the recession and the unprecedented changes to consumer behavior prompted by the lockdown will have ‘changed the game’. This could mean a longer road to recovery, but also a very different consumer and business environment.

The ‘Post COVID-19 World’ survey conducted by BDRC in April/May showed that 63% of households have had or expect to see a reduction in their income, 15% have seen someone in their household lose a job, and 94% will reduce their household budgets at least for the rest of 2020, partly out of necessity and partly as an insurance policy for more difficult times ahead.

Our corresponding business survey also shows that, despite generous government support measures for businesses, a net 25% of companies claim they will be worse off at the end of 2020. 77% of businesses report a reduction in revenue and business activity, and 55% report reducing headcount, cutting salaries/benefits, or switching staff to part-time hours. 18% of companies have retrenched staff, and 32% expect to do so in the next six months.

**The path to recovery and how to achieve this**

While businesses have been battered, there will be opportunities in the recovery. Consumers will still spend, but in new areas and via new channels. Clearly e-commerce will benefit, as 30% of consumers state they will continue to do more of their shopping online, and there will be higher demand for consumer electronics, household goods, and home entertainment products, as people will work and entertain themselves more at home. In response to changes in working arrangements, 80% of businesses state they
will invest in new IT (e.g. cloud services, AI, remote working technology, etc), and there will be higher demand in areas such as healthcare, hygiene products, and safety certification.

But a boost to both consumer and business morale will be needed to achieve a return to some form of normality, which is only half expected to happen in 2020. Within our surveys, we assessed the morale of both consumers and businesses and the factors that will help to determine positivity and better business outcomes by the end of 2020.

Among consumers, clearly those who were more negatively impacted by the lockdown – e.g. through job losses or reduced income – had lower morale, but this was actually more prevalent among those who anticipated these losses in the future. This indicates that uncertainty about the future can be worse than the certainty of what has already happened.

What helped to build morale was the activities that consumers turned to during lockdown. Those who kept themselves busy with new activities reported better morale than those who did not, especially when they partook in exercise, more socialising (e.g. through Skype calls), and in particular self-improvement, such as training and upskilling, learning to cook/finding new recipes, and doing creative activities such as art, music, or writing.

Among businesses, the outlook varies a lot by industry sector. Manufacturers are the least optimistic, although some industrial sectors are more positive, possibly because of government investment in Singapore’s infrastructure. Consumer services (excluding retail and hospitality) are the most positive as opportunities are opening up for e-commerce and technology, among others. Importers are also more optimistic than exporters, the latter being more inhibited in selling overseas than those who buy overseas, as selling often requires more face-to-face contact with prospective clients than buying remotely does.

But like consumers, businesses need to take action to improve their own outlook. We see that those businesses that moved quickly to remodel themselves, and those that have definitive plans for restructuring and investing in IT specifically, have a more positive outlook. Notably, companies that have managed to switch staff to part-time working arrangements, those who plan to implement more flexible work arrangements for their staff, and those who intend to outsource more to reduce headcount are more optimistic about their business prospects. They also intend to focus more on core markets than chasing new business.

In contrast, companies that have needed to retrench, and those with no plans to take on new technology, are the least positive. Those seeking concessions from their landlords are less positive, indicating that being stuck with expensive leases is dampening business morale. In Singapore there is a lot of flexibility for companies to reduce their staff costs, but the financial commitment of leases can be a burden on businesses with relatively high commercial real estate costs.

The Economist wrote about the ‘90% economy’ – for most businesses, achieving 90% of their revenue compared to 2019 would be quite an achievement given the circumstances, even with tighter margins. But many businesses will have significantly less revenue than this, although even companies dropping to 70% of their former revenue can adapt to this ‘new normal’, and it is better to think of the 70% of revenue that has been retained than the 30% that has been lost. What is important is that businesses have the flexibility to adapt to this ‘new normal’ by, if possible, retaining their best staff through more flexible work arrangements.

Like consumers, the businesses that have been more active during the crisis – e.g. by undertaking a range of initiatives to remodel themselves – have a better outlook. This can also mean that they have been able to communicate their plans and initiatives to all levels of management within the business. Managers ‘left in the dark’ about their company’s plans have a more negative outlook for the future. Similar to consumers, uncertainty about the future can be worse than what has already occurred.

One of the most significant findings from the BDRC survey is that, with both consumers and businesses, one of the highest drivers of a more positive outlook and morale is the level of confidence they have in the government’s handling of the crisis. Those describing themselves as ‘completely confident’ in the government were 50–90% more likely to have a more positive mood or outlook. Hence, beyond the financial assistance provided by the government during the crisis, specific support to help consumers retrain and upskill will add to consumer sentiment, as well as support for businesses to invest in new technology to help them adapt to a new market characterised by more e-commerce, remote working, and disruption to international markets.
Today the challenge lies in balancing pressing tactical decisions and long-term strategic ones. To inform all these decisions, assumptions are being made about if, and when, consumer behaviour will return to pre-COVID norms. These assumptions could be based on pre-COVID insights (experience), but especially now, old assumptions need to be reverified by multiple data sources where possible.

Strive for data-driven decision-making

Run ‘what’ if and competitive scenarios and overlay these with as many data sources as possible. A wide dataset, such as sales data, brand trackers, marketing mix models, expert views, and consumer insights, will help you make the best pricing and portfolio decisions.

Emerging from the initial shock of COVID-19, consumer purchasing habits have been disrupted, be it temporarily or permanently. Sales data alone is also less reliable for forecasting models, thanks to activities such as hoarding and disrupted shopping frequencies. More than ever, we operate outside of known parameters and thus face more uncertainty.

Under normal circumstances, trended sales data combined with information on promo pressure can give robust indications of what to expect when making changes in store or online. Even when going outside of known parameters, we can supplement data with research among shoppers to understand how they would react to triggers such as an innovation, new promotions, or new prices.

3 tips for making pricing decisions for the ‘new normal’

Below are recommendations for how you can tackle pricing decisions now:

1. Collect information from a variety of ‘experts’
   Different external, secondary sources can inform the pricing scenarios you are considering. Publications from consultancy houses, trade organisations, and industry experts are good starting points.

2. Zoom in on unexplained model variations
   Determine which variations in your models you can explain and dig deeper into unexplained variations. Consider reaching out to your shoppers directly to get a better understanding, whether qualitatively or quantitatively. You can keep it as simple as doing interviews with a few customers or set up more extensive research.

3. Keep feeding your scenarios with data
   Before COVID-19, one could safely base decisions on sales data supplemented with a single piece of pricing research to fill in the knowledge gaps. But as consumer preferences continue to shift, the shelf life of old pricing research is changing. Consumption rates and ‘willingness to pay’ for certain products and services can change from one day to the next depending on lockdown restrictions, travel bans, news, and economic conditions. While it may be tempting to completely avoid investing in primary research right now, new research can reveal...
valuable and critical insights that are useful in the current environment. For example, the combination of increased home-bound consumption and widespread economic insecurity has big implications for manufacturers (e.g. offering the right SKUs, pack sizes to fit changing needs).

Key takeaway for pricing and insights professionals

Sound research and data are critical to inform pricing decisions in the short and long term, especially in times of disruption. Now, more than ever, brands that are maintaining a competitive edge have adopted an agile approach to pricing research. They recognise that relying on a robust pricing model with a validity of perhaps less than three months is not sustainable. Instead, they have shifted their insights strategy to keep a finger on the pulse of consumer behaviour now and in the coming months.

On this last point, it seems a tough decision to warrant investment in pricing or portfolio research. Results from a pricing rerun of eight large CPG pricing studies in December within the US and Europe give us confidence that outcomes are consistent. We learned that consumer preferences and purchase behaviours remained similar from the end of 2019 to March and April of this year. Although our research for this particular study shows that COVID-19 had minimal impact, it doesn’t mean the same results will occur for a different product or brand. By comparing the same conjoint analysis during COVID-19, and in three and nine months’ time, these businesses will be able to track any changes and adapt their pricing strategy in a dynamic and uncertain market. This effective and efficient approach will also better equip them for tough retailer negotiations during the recession, because “retailers are likely to want to reevaluate their category vision and assortment” (McKinsey, April 2020).

Just as we have personally adapted to the disrupted life with and beyond COVID-19, our answers to these pricing questions will determine our business direction in the next crucial years. •

Decision-making continues to change
Adapt your insights strategy today

Pricing & revenue management  
Brand communication  
Product development & innovation

Advanced analytics  
Decision & customer journey mapping  
Choice modeling

SKIM is a global insights agency helping leading companies thrive by understanding decision-making, online and offline.

Want to pick our brains? Contact our team in Singapore: skimgroup.com
In the history of marketing, there has never been a more direct, intimate, and current window into the soul of consumers than their online behaviour. In Asia, ‘online’ means mobile, and therefore the smartphone is the gateway to understanding the Asian consumer. Passive metering is the aggregation of this data for research and measurement purposes. Everything a consumer does on their phone leaves a digital trail, and passive metering enables marketers to follow those trails by aggregating information about every website visited, app used, term searched, media streamed, influencer followed, and social media engaged with on monitored devices.

Harvesting marketing gold
This information is pure gold to marketers, and, like gold, its allure has encouraged many mining methods. Some nefarious means have led to public relations fiascos that can both enrage consumers and lead to huge fines.

The brand-safe approach to harvesting this data is opt-in panels of consumers, who give very conscious consent to sharing this very personal data. But this approach can be expensive, difficult, and risky.

The challenges of the traditional passive metering approach
Recruiting panels is hard enough, but the real work with passive metering panels is in compliance monitoring and retention. The traditional approach to passive metering is to gather every morsel of data from each phone, regardless of the differing tolerance levels of the consumers or their phones. The trade-off for this comprehensiveness in mobile-focused projects is phone burden in terms of battery, CPU, memory, and broadband. In emerging markets, smartphones are the lifelines, the sole connection to the grid, for many consumers. The greater the monitoring methodology’s burden on the phone, the greater the challenge and cost to panel recruitment and retention. The panel expense combined with client budget restraints leads to short-term studies with small panels, which defeats the real promise of passive metering.

Add to the panel expense the cost of licensing and integrating the survey, monitoring, and reporting technology, along with the project management and operations costs and the significant project failure risks, and it is
easy to see why many brands have shied away and how this has prevented passive metering from achieving its full potential for consumer insights.

Unlocking commercial viability

The key to achieving the consumer insights passive metering enables in a commercially viable way is to monitor large panels continuously, focus data harvesting on critical data only, syndicate the data streams to lower the costs for all clients, and enable each client to meet their unique needs through custom extras like surveys targeting the exact consumer profile or mobile behaviour of interest, measuring the reach and effectiveness of specific internet, TV, radio, or OOH advertisements, or collecting and adding metadata to pictures of products, places, or life moments uploaded by participants.

The People Data Company (PDC) is helping marketers break through these barriers by providing large, continuous panels across emerging market nations, with a specific focus on mobile shopping activity in its Mobile Shopper Monitor service.

This approach allows clients to select the consumer profile they wish to analyse in increments of 500 consumers, select the specific behaviours they wish to see from which apps and sites, and pre-program surveys triggered by specific mobile actions immediately. For example, if a consumer orders a meal without a beverage, a survey can ask them why, immediately. If a consumer changes SIM cards and then streams music, a survey can ask them why they prefer that SIM for that purpose. If a consumer selects an item on one marketplace or food delivery app, a pop-up survey can ask if they would buy another item if offered a better deal.

Better, faster, cheaper insights

To address marketers’ increasing need for better, faster, cheaper insights, PDC presents both the syndicated mobile activity data and each client’s custom data like survey responses and advertisement reach measurements on interactive dashboards. These enable DIY analysis with dynamic filtering and cross-tabbing, as well as one-click print to PowerPoint and/or downloading of the raw data. Scheduled downloads of custom formatted files and API connections enable each marketer to get the data they need, when they need it, and how they need it to support their decision-making processes.

Fulfilling the potential of passive metering across SE Asia

PDC launches Mobile Shopper Monitor in October in Indonesia, Vietnam, and the Philippines. Expansion will continue in other SE Asian nations before year-end.

Making passive metering more actionable for clients and less burdensome for consumers will enable this powerful technology to finally fulfil its potential effectively and economically for clients, and painlessly, transparently, and ethically for consumers.

Mobile Shopper Monitor: mobile metering and polling to understand the...

ads she sees,
apps she uses,
sites she visits,
media she consumes,
products she buys
...and the reasons why.

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MOVE TO MORE DIY RESEARCH

The Asia Research Stakeholder Survey showed that 48% of clients put ‘faster turnaround of research’ as a ‘high priority’ for their research needs in the next year, and 37% also state it is a high priority to undertake more DIY research. These findings reflect some of the challenges clients will face in markets severely impacted by the COVID-19 crisis, including lower budgets for research and having to deal with more volatile markets. This means that consumer insight will have to be cheaper, faster, and undertaken more frequently.

Online panel companies have long since moved on from just being providers of consumer access panels, and now position themselves as ‘data management companies’ providing a suite of services for clients to access and use survey and customer data.

Asia Research interviewed Ludo Milet, Managing Director of Toluna (Asia Pacific), to understand how data management companies are responding to new client demands for data.

Ludo comments that from around 2016, clients were looking more to automation in the reporting of data. Hence, instead of waiting on agencies to provide standard PowerPoint reports taken from data tables, dashboards were developed not only to increase the speed and accuracy of data delivery, but also to extend the visibility of data within client organisations, i.e. with more individual users of the data.

These dashboards lent themselves well to more templated types of research, e.g. brand trackers that generally followed standardised questionnaires. However, clients increasingly looked to a wider range of research that can be delivered seamlessly without the involvement of research agencies, including pre- and post-product/advertising testing and more general surveys, e.g. usage and attitude studies.

With more client organisations developing internal insight departments, much of the design work of surveys can be undertaken by the in-house research teams. Toluna has invested in a new platform that allows clients to script their own surveys, select their audiences for research, launch online surveys, and have results delivered automatically and in real time through a single platform.
A key component of the new platform is making the scripting that much easier for researchers who lack the programming skills of more complex survey-hosting software. This requires the data management companies to understand more about the nuances of survey design and combine this with better usability. While Toluna has avoided becoming a full-service agency in their own right, in 2014 they acquired Harris Interactive, with full-service sector expertise and award-winning research designs. This design expertise helped Toluna to develop a platform for more tailored surveys that can also include ‘quick communities’ and online qualitative research, although the main demand is for more standard quantitative surveys.

While these solutions might be seen as a response to the new demand for research in a COVID-19 research world, Ludo comments that Toluna had anticipated this demand prior to the onset of the crisis, and they have been undertaking product development to meet this anticipated need since 2015.

Ludo also discussed the current impact of COVID-19 on their business. Like most companies, staff have been forced to work from home, which generally suits sales and account management personnel, but puts challenges on the data processing teams, who need more interaction with teams. There are also additional pressures on staff in some markets such as Hong Kong where staff usually live in small apartments which mean that ‘stay at home’ directives can be more stressful, and also in India where they have large data processing teams but where there is quite a severe lockdown environment.

But the future looks bright for the data management companies – based on Asia Research’s stakeholder survey, 70% of clients expect to go direct to panel companies in the next year (up from 40% currently), and among these, 68% state they will use them more than before COVID-19.

### NEW LEADERSHIP AT MOENGAGE

Customer analytics platform MoEngage has made several new appointments to its leadership team.

Atma Gunupudi has joined as Vice President of Global Customer Success to help shape and scale the company’s customer success strategy. Prior to this, Atma built and led globally distributed customer success teams at Salesforce, delivering complex digital transformations across segments, industries, and geographies.

Saurabh Madan has joined as General Manager of South-East Asia & ANZ and will oversee the company’s go-to-market initiatives in the region. He brings deep experience in consulting mobile-first brands and has a proven track record of setting up high-performance growth teams.

Additionally, Yash Reddy takes charge as Chief Business Officer; he will oversee growth and strategy across APAC and the EMEA regions.

### UNRULY PROMOTES NEW APAC GROUP MD ROLE

Video ad tech firm Unruly has promoted UK MD Alex Khan to Group MD, International. The former Oath and AOL MD, who joined Unruly in May, will now head up the company’s commercial activity across the APAC region, as well as continuing to oversee all UK operations.

Khan will be responsible for driving Unruly’s growth across APAC, including rolling out the additional CTV, In-App, and In-Stream services added following its acquisition by Tremor International at the start of 2020. Khan takes over the APAC region from Phil Townsend, who has left his role as APAC CRO after 10 years at Unruly.

### SAAS VETERAN STEVEN MEDEIROS JOINS VISION CRITICAL

Customer insights solution provider Vision Critical has appointed Steven Medeiros as General Manager, Asia Pacific and Japan. Medeiros joins the Vision Critical executive leadership team to expand the company’s high-growth trajectory in these regions and support its clients and partners in driving excellence in the customer experience management (CXM) space.

“Steven is a highly passionate and established SaaS leader who believes in delivering perfection and value to all of his clients,” said Ross Wainwright, Vision Critical CEO. “With his extensive experience and insight building successful businesses within the international market, Steven is sure to propel Vision Critical as a CXM leader in the Asia Pacific region. We are fortunate to have him join our team.”
Many species of butterfly can reflect and absorb ultraviolet light through spots on their wings. This light is invisible to the human eye, but butterflies can use ultraviolet light to communicate by flapping their wings.

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