



Brands
in ***Motion***

Singapore | 2018

A country in motion

- **Globally-recognised innovator**
 - 4th largest exporter of high-tech products as defined by the World Bank
 - 5th place on 2018's Global Innovation Index
- **Government policy a driving force for change**
 - Smart Nation: a public sector-led initiative to create a smarter, more seamless and livable Singapore
 - The push towards a unified cashless payment system has placed local brands like Razer and Singtel squarely in the intersection of technology and policy
- **Culture of innovation vs fear of unknown**
 - Expectations around innovation are sky-high—but so are fears about how technology will disrupt consumers' lives
 - Singapore's society values the positive outcomes of innovation, while preferring comfort and familiarity over the uncertainty of the 'new economy'

Singapore has high expectations for tech

Compared to our counterparts globally, Singaporeans have significantly higher expectations for tech-enabled brands. We expect technology to deliver better and more efficient experiences, and are less inclined to accept that tech-enabled brands will make mistakes.

Q: “Over the next few years, to what extent do you think technology will allow companies and their products/services to...?”

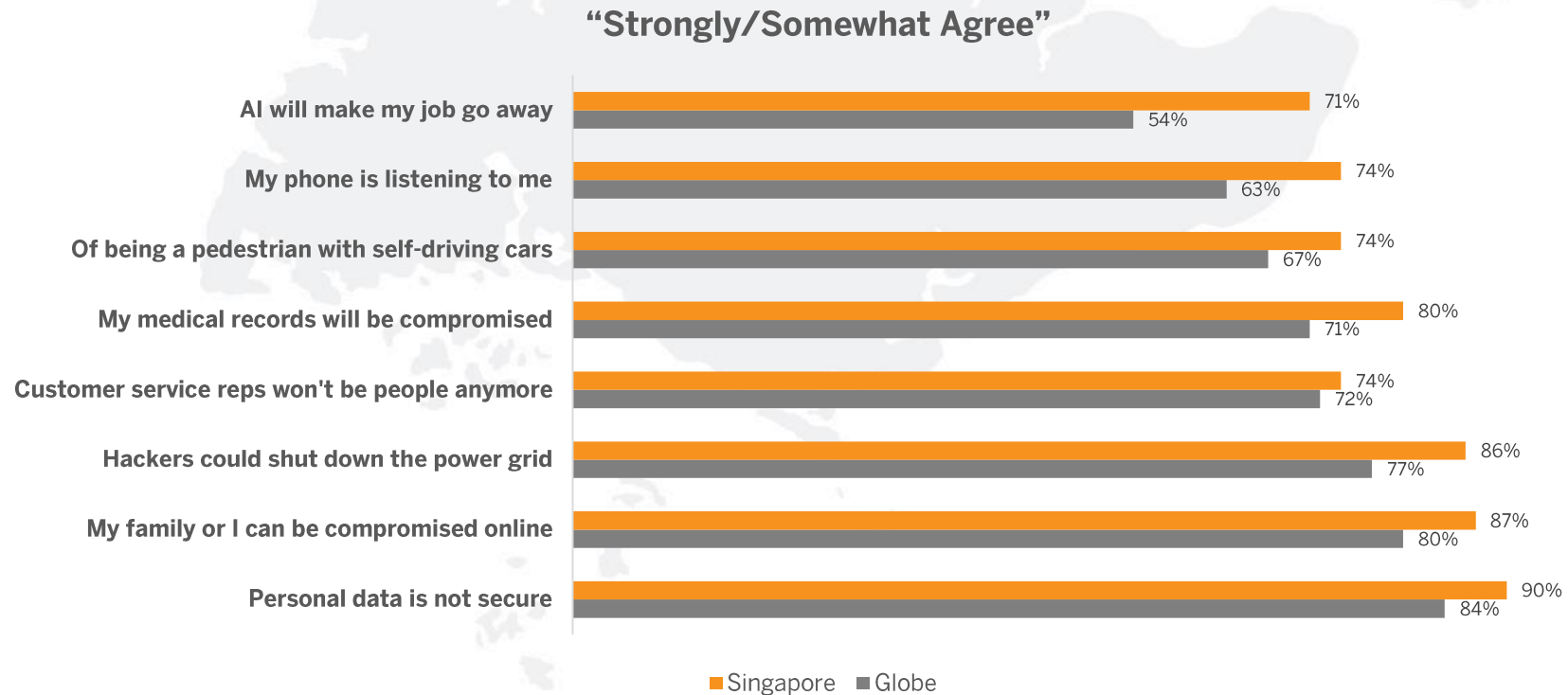


Respondents were able to choose “Absolutely,” “Maybe,” or “Not at all”.

Fear of technology is also high

Singapore bucked the trend of other optimistic markets, which tend to have high expectations and low fear of technology. Fears in Singapore were significantly higher than the global average, and are centred around personal safety and security concerns.

Q: To what extent do you agree you are fearful of the following scenarios?

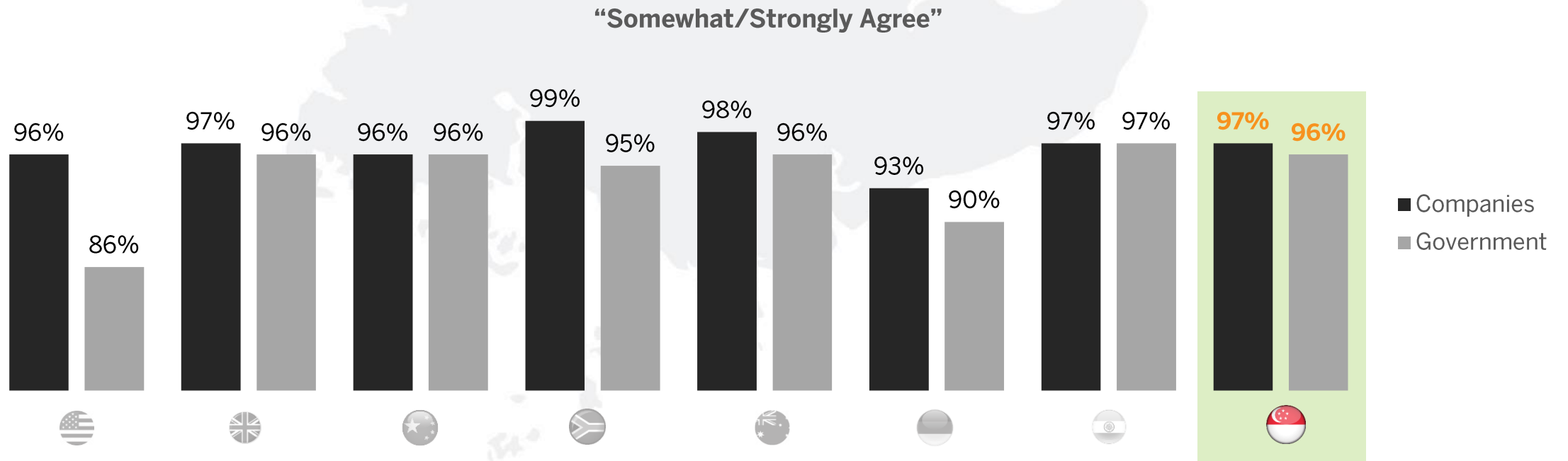


Respondents were able to “Strongly agree”, “Somewhat agree”, “Strongly disagree” or “Somewhat disagree”.

Innovation meets ethics

Singaporeans believe that the government shares equal responsibility with brands to ensure ethical use of technology.

Q: To what extent do you agree that companies have a responsibility to use technology ethically? To what extent does the government have a responsibility to ensure companies use technology ethically?



Respondents were able to agree or somewhat agree, or to disagree or somewhat disagree



2017 Realities: Truer Than Ever

REALITY #1

Stability is an element of motion

REALITY #2

Cutting-edge is transcendent

REALITY #3

Good product, good purpose

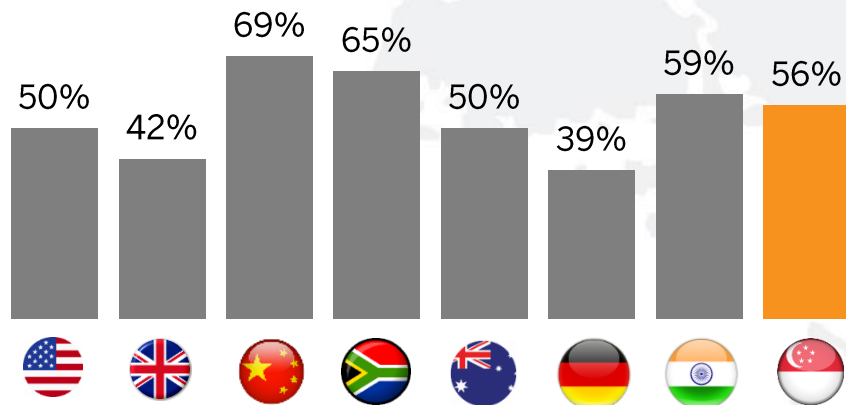
REALITY #4

Love you today, shame you tomorrow

Reality 1: Stability is an element of motion

Can brands provide stability?

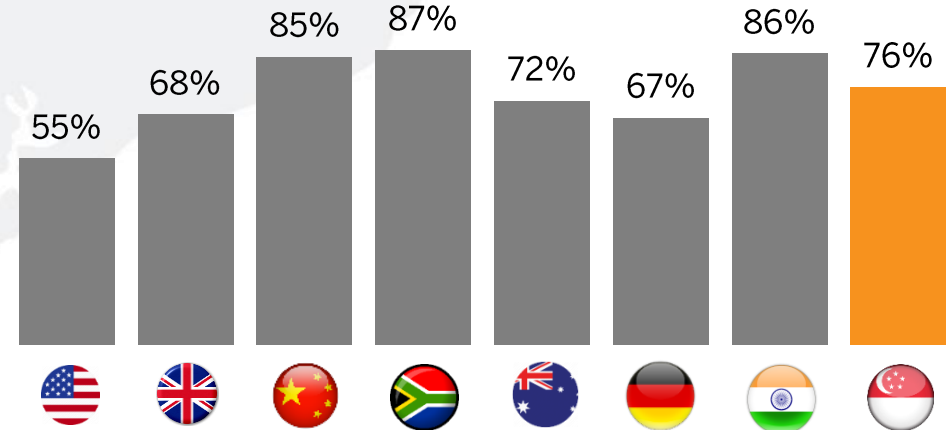
We asked “in a climate of uncertainty, do brands/businesses have the capability to provide stability?”



56% of respondents believe brands can.

Should brands take a stand?

We asked “How much do you agree with the statement...? “I expect brands to take a stand on important issues.”











76% of respondents have an expectation.

(agree or somewhat agree)

Reality 2: Cutting-edge is transcendent

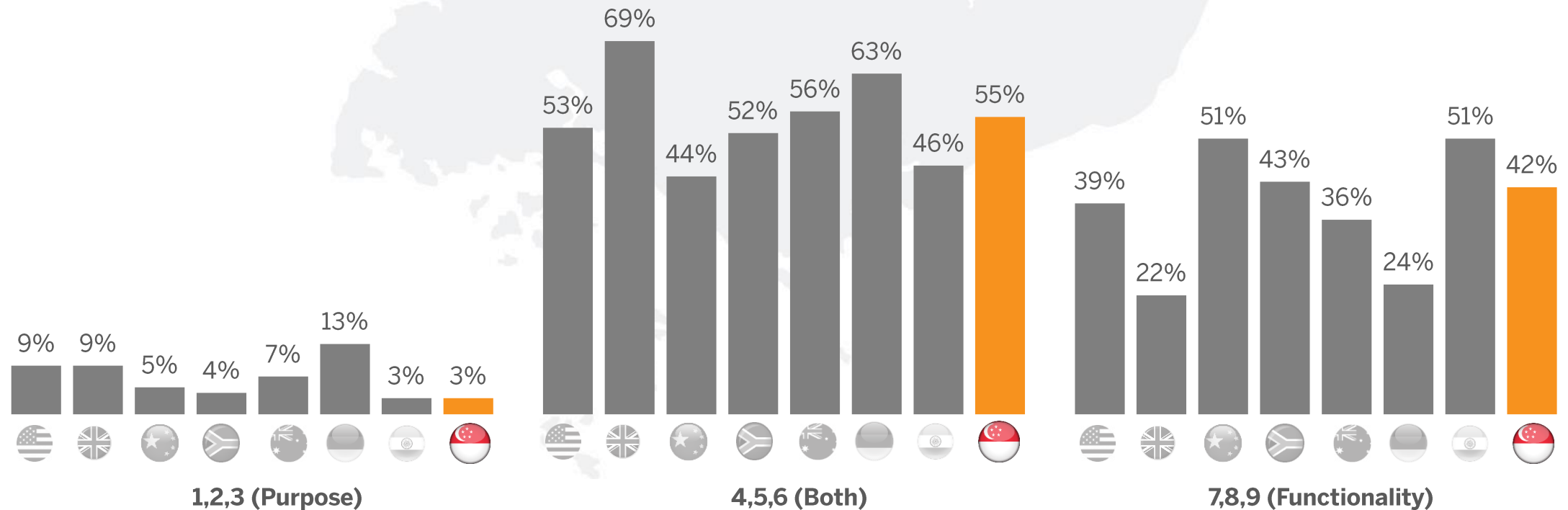
Brands that are viewed as cutting edge – whether enabled by technology or inspired by it – are also viewed positively in areas that transcend product.

| How they correlate with innovation (A correlation of .5 or higher is considered strong) | | | |
|---|-------------------------------------|--|-------------------------|
| | Common good OR Does harm | It's a pleasure OR Completely miserable | Love OR Hate |
|  | 0.63 | 0.61 | 0.67 |
|  | 0.59 | 0.57 | 0.61 |
|  | 0.65 | 0.69 | 0.69 |
|  | 0.52 | 0.61 | 0.62 |
|  | 0.63 | 0.64 | 0.68 |
|  | 0.52 | 0.54 | 0.58 |
|  | 0.56 | 0.64 | 0.62 |
|  | 0.62 | 0.69 | 0.68 |

Reality 3: Good product, good purpose

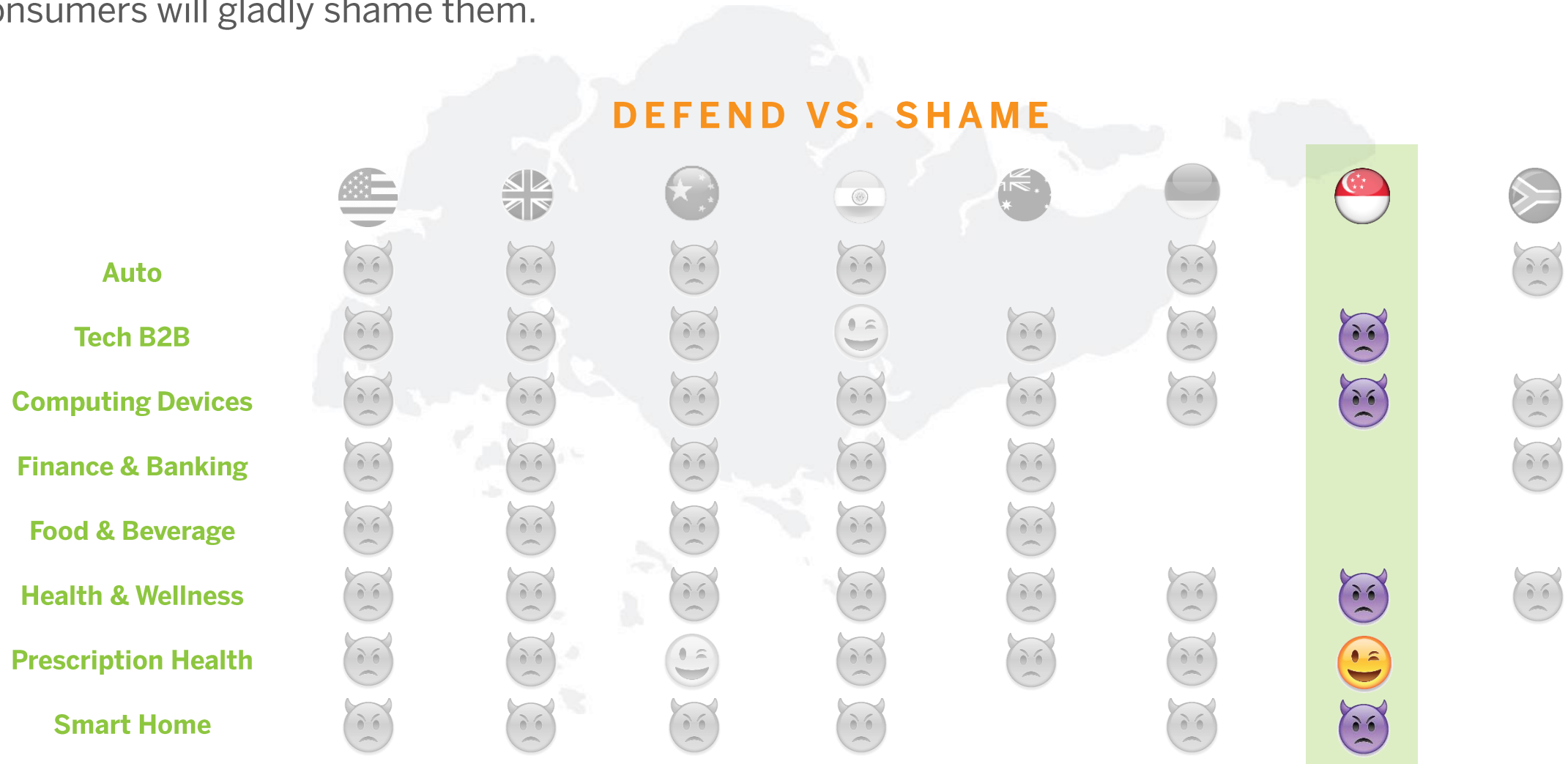
The majority of Singaporeans prefer to support brands that balance purpose and functionality. When given the choice between the two, they have a significantly higher preference for functionality. This is consistent with the practical and value-conscious mindset of consumers in Singapore.

We asked the question “Are you more likely to support a brand that has a high level of purpose or a high level of functionality?”



Reality 4: Love you today, shame you tomorrow

No matter how much consumers say they love an industry, if a brand steps out of line, most consumers will gladly shame them.

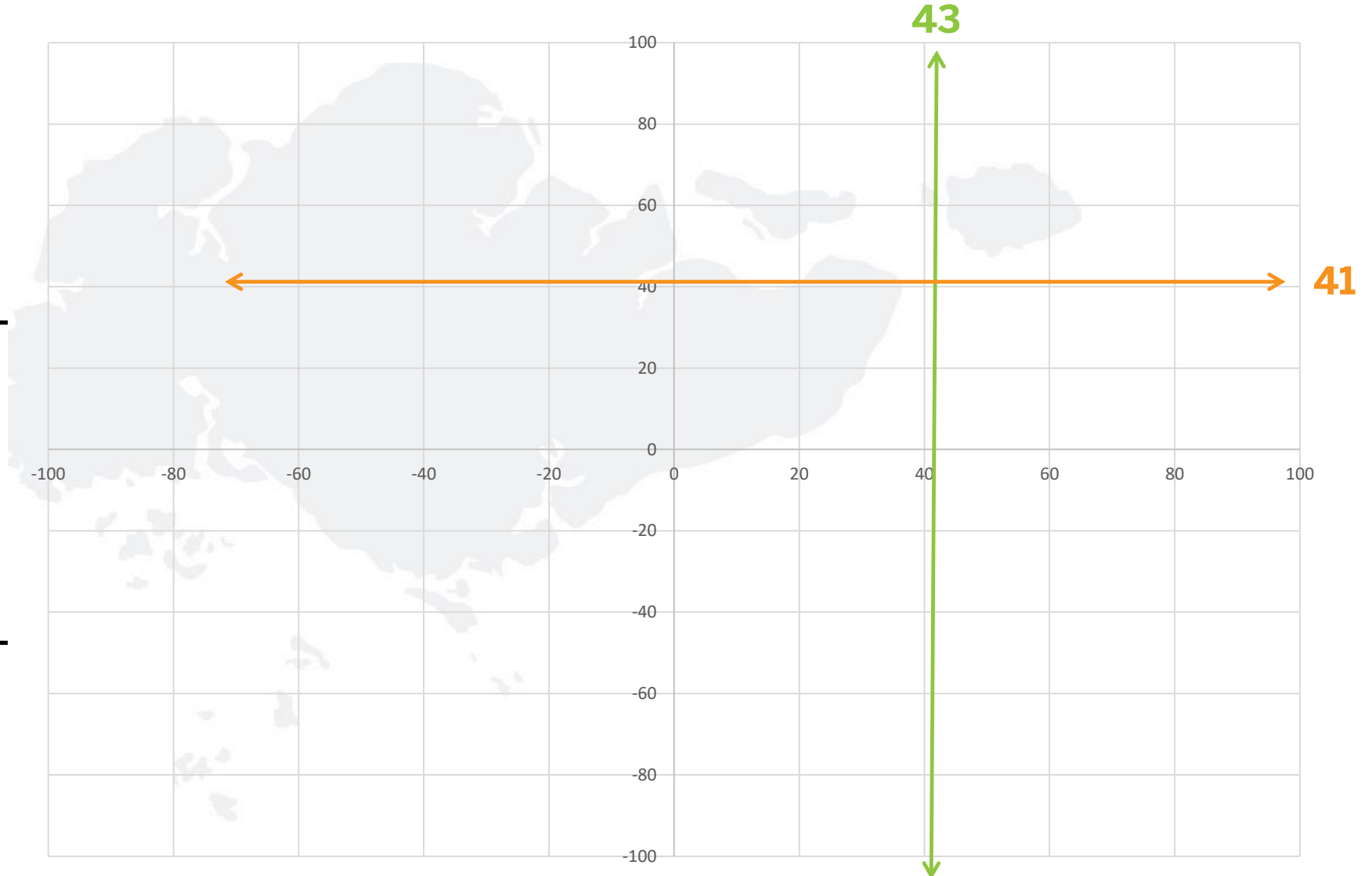


Motion Matrix: Understand the axis points

This is the first year Brands in Motion has surveyed Singapore. Average emotional driver scores in Singapore were 41, and average rational scores were 43, making it one of the more optimistic markets we surveyed.

Other optimistic markets include China, South Africa and India.

| | 2018 | |
|-------------------------------------|-----------|-----------|
| Category | Emotional | Rational |
| Computing devices | 44 | 47 |
| Smart home | 40 | 39 |
| Health and wellness | 32 | 35 |
| Technology B2B | 40 | 42 |
| Prescription health | 47 | 50 |
| Matrix axis points (average) | 41 | 43 |



Motion Matrix: Key observations

Rational and emotional scores are high in Singapore, which makes it difficult for brands and categories to be seen as movers.

- Singapore is the only market in which **smart home** is a defender. Despite Smart Nation initiatives, smart home adoption is low, perhaps due to fears over data privacy and poor availability.
- **Prescription health** is a mover in Singapore, likely due to affordable and accessible brand name products and a halo effect created by the excellent state-run healthcare system.
- On the other hand, **health & wellness** is struggling to connect with consumers—it's a defender on the Motion Matrix, perhaps due to the government's support for digital health transformation, which has flooded the market with quick-to-grow and quicker-to-fail health tech startups. There's a generational aspect as well: 61% of Generation Y and Z respondents say they love health & wellness brands, but that number falls to 44% in Generation X and 45% for Baby Boomers.



Managing a World of Motion

How to put this study to work for you:

1. Understand your ideal placement on the Motion Matrix
2. Understand how you compare to your category
3. Choose a balance in terms of function and purpose
4. Using technology to meet and exceed customer expectations is imperative

APPENDIX

ABOUT BRANDS IN MOTION





2018 STUDY

8 MARKETS

CHINA, UK, US, SOUTH AFRICA, GERMANY,
AUSTRALIA, SINGAPORE*, INDIA*

26,897 consumers and B2B decision makers

8 CATEGORIES

1. Business Technology Solutions
2. Computing Devices
3. Smart Home
4. Automobile
5. Finance and/or Banking Products
6. Health & Wellness
7. Prescription Health*
8. Food & Beverage*

What WE Measured



RATIONAL DRIVERS

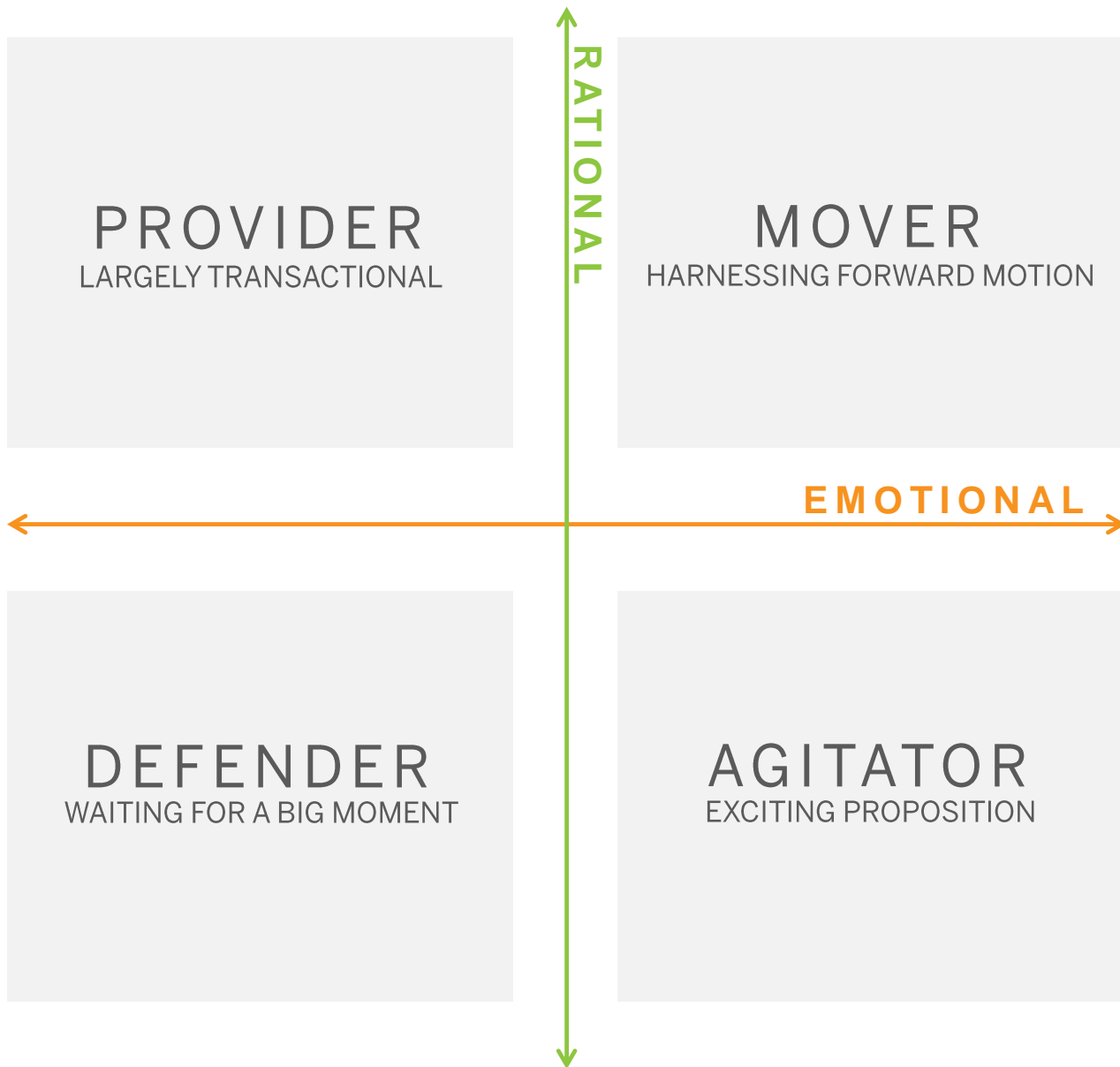
1. Executive behavior*
2. Innovative*
3. Intent to purchase*
4. Necessary*
5. Financial performance
6. Industry leader
7. Quality
8. Responsible
9. Value
10. Easy to work with



EMOTIONAL DRIVERS

1. Customer experience*
2. Defend or shame*
3. Disappeared*
4. Love/hate*
5. Overall impression*
6. Social impact*
7. Buzz
8. Forgive/not forget
9. Life impact
10. Shared values

* Measured at the category level



Defining the Quadrants

MOTION MATRIX QUADRANTS

1. Movers: Harnessing forward motion
2. Agitators: Exciting proposition
3. Providers: Largely transactional
4. Defenders: Waiting for a big moment