



APRIL 2018

Digitally Enabled Field Data Collection

Innovating Market Research in Southeast Asia

Introduction

Premise turns everyday consumers into **taskable market researchers** on behalf of leading brands and research companies. Through Premise’s innovative mobile platform, brands and research companies can direct a global network of contributors to collect accurate and highly granular market data, delivering critical intelligence on in-store **product placement, promotion compliance, pricing, consumer sentiment**, and more.



GDP GROWTH FORECASTS FOR SOUTHEAST ASIAN COUNTRIES (% , year)

COUNTRY	2017	2018
Brunei Darussalam	0.0	1.0
Cambodia	7.1	7.1
Indonesia	5.1	5.3
Lao People’s Dem Rep	6.9	7.0
Malaysia	5.4	5.4
Myanmar	7.7	8.0
Philippines	6.5	6.7
Singapore	2.7	2.7
Thailand	3.5	3.6
Viet Nam	6.3	6.5
AVERAGE	5.0	5.1

Source: Asian Development Outlook 2017 Update

Premise has built a robust network in Southeast Asia to serve a growing portfolio of clients in the region. Premise’s proprietary contributor recruiting methodology is ideally suited to the region as many countries are experiencing strong population growth, with young, urbanizing, and digitally enabled individuals. With annual GDP growth at close to 5% for the region, Premise’s clients are interested in collecting reliable data to understand more about specific markets and trends in this evolving and complex region.

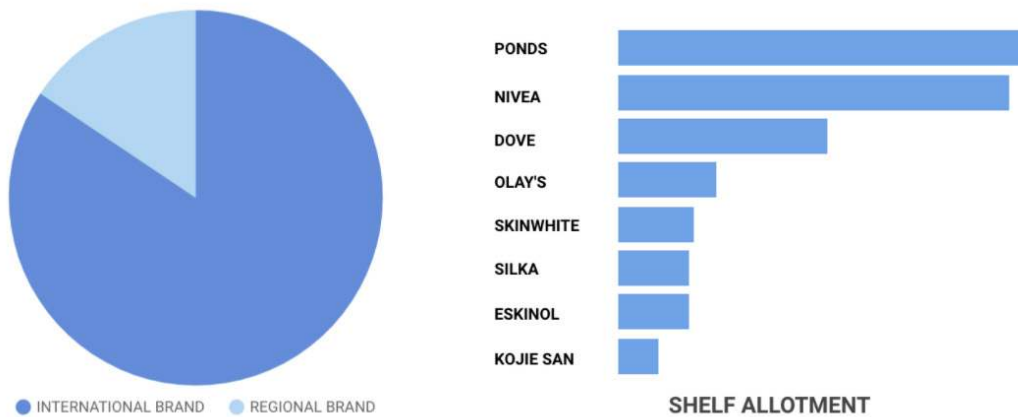
Premise’s Southeast Asian network recently conducted a two week data collection project evaluating in-store product placements of top skin moisturizer brands. The project targeted popular drugstore chains in the two largest metro areas in the Philippines, Manila and Davao City, as well as Ho Chi Minh City in Vietnam.



Sample Results

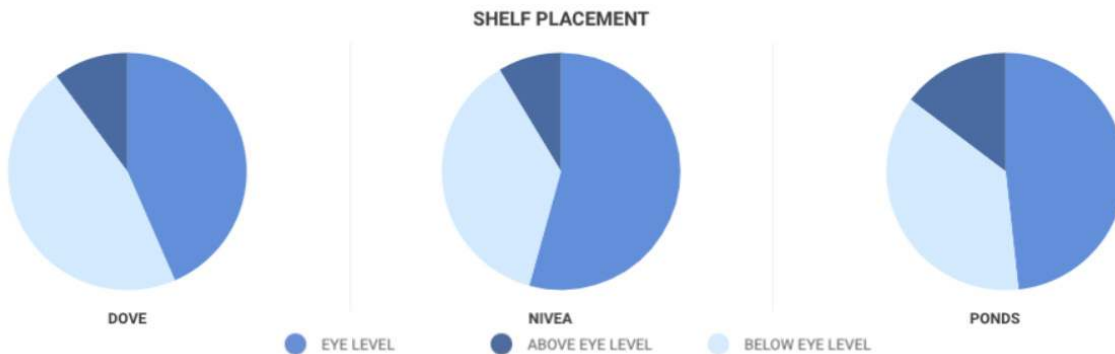
GLOBAL BRANDS TAKE TOP SPOTS IN SHARE OF SHELF

Data showed stronger share of shelf from global brands like **Ponds** (Unilever), **Nivea** (Beiersdorf), and **Dove** (Unilever) than from regional brands like Skin White (Splash) or Silka (Cosmetique Asia). Global brands were 5 times more likely than regional brands to hold the top spot for share of shelf.



NIVEA LEADS IN EYE-PLACEMENT ON CATEGORY SHELVES

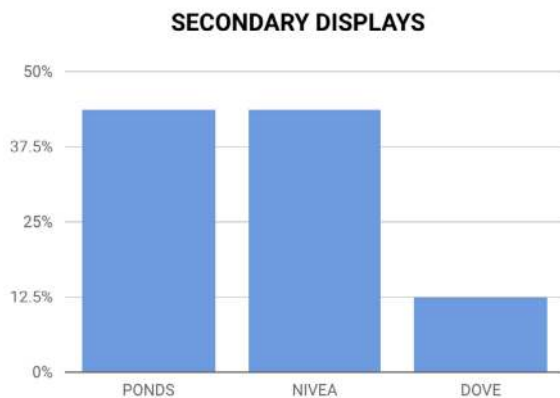
Nivea’s products were the most often reported at eye level (51%), closely followed by Ponds (47%). Of the leading three brands, Dove was most often found below eye level (50%) and was the least likely of the three to be placed at eye-level (39%).





PONDS AND NIVEA TIE FOR SECONDARY/PROMOTIONAL DISPLAYS

Ponds and Nivea were a virtual dead heat with over 40% of stores having secondary displays of their moisturizers. Those top two brands far outpaced the field with the Dove brand in third place with secondary displays in 10% of stores.



Summary

The Southeast Asian consumer goods market will continue to evolve quickly and access to the right data will drive smart marketing and merchandising decisions. These high level results reflect the innovative market research that Premise's global network is producing - on-demand, highly granular, accurate, efficient. As global and regional brands battle to position themselves with consumers, digitally enabled field data collection will deliver short and long term ROI.

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