

## President's Message

Although the COVID pandemic has receded, the on-going war in Ukraine, the tightening in the world financial market brought by high-interest rates and inflation continue to slow down global economic growth. Across the world, businesses faces uncertainty leading to the reduction of capital and resource investment. This trend would likely continue depending on the global conditions and national policies.

In today's hypercompetitive world, head on competition often leads to a zero sum game where one company's gain is another company's loss. In this issue of *Leading the Way*, "Toddlers and Co: Innovate or Die", addresses this challenge through the application of a proven, replicable framework of creating new uncontested market space, thus making the competition irrelevant.

With a population of over half of the world's population, the Asia Pacific region plays an important role in the global economy. In "Business Opportunities in ASEAN", Atty Benedicta "Dick" Du-Baladad from the Management Association of the Philippines shared a summary of the panel discussion which took place in July 2023. The panel, made up of ambassadors from Malaysia, Singapore, Thailand, Vietnam, and Indonesia, focused on business and investment opportunities in their respective countries.

The three-year-plus pandemic has also

provided businesses and employees unprecedented opportunities to learn and adapt. New trends in the workplace, such as work from home, have also enabled companies worldwide with new economic and tangible benefits in attracting and retaining talented employees. In "Humanizing Workplaces Transformation in a Technology-driven Market Environment", Ms Alma Rita R Jimenez shared with the readers the three changes essential to humanizing the workplace, namely Mindset, Process, and Skillset, which enable employees to excel no matter working in the company offices or at home. Mastering these changes would propel business growth with high-performance employees.

Advances in digital technology have also transformed the entire media and entertainment industry. The three-year lockdown has brought on more in-home and mobile entertainment where streaming of video and music have reached high growth, thanks to the mobility and high quality media distribution and delivery using mobile technology. In "From Passive Listeners to Active Curators: How On-Demand Music Streaming Transformed the Hong Kong Listening Experience", Mr Zion Lee shared with readers how the power of streaming and customization have enriched consumers' music experience and brought a profound change in media consumption and culture. I trust you all would enjoy reading these

articles. I personally find them insightful, practical, useful and entertaining. I wish all of you a very productive 2023 and good health and happiness.



**S K CHEONG,**

President

Asian Association of Management Organisations

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# Toddlers & Co: Innovate or Die

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## Abstract

Each month at least one or two new Facebook pages are introduced with news regarding another launch of a new company related to recreational activities for young children. The market appeared to be commoditized with little differentiation of offerings. A research was conducted to explore a new business model for Toddlers & Co, a recreational company launched in 2016. The research suggested that the industry is using both emotional as well as functional appeals, but majority of parents prefer other alternatives because they perceive this industry to be more or less similar to school i.e. providing the same set of activities such as reading, writing and storytelling amongst other things. Changing this industry's orientation could unlock untapped markets. Six pain-points were identified during the research such as how to spend time without getting worried to pick up kids on time, or the risk involved in purchasing the service. The solution can be to introduce online payment methods and to inculcate a gym and/or a coffee shop to let the parents enjoy their time while the kids were having fun in the program. To tap the unexplored non-customer group such as the elderly people living in old-age houses or the street children, Toddlers & Co. could opt for the introduction of a philanthropic subsection in its business model.

**Key Words:** Industry Structure, Industry Strategy Canvas, Buyer Utility Experience, Non-Customers, Six Paths Framework, ERRC, Value Innovation.

2nd November 2017: Maryam and Fatima, owners of Toddlers & Co., were discussing about the emerging competition and commoditization of their new enterprise on young children's recreational activities in Karachi. They were concerned that their business might not survive well because of the nature and ease in opening up such business. With the threat of being unprofitable, they wanted to make a sustainable strategic move.

With every passing day, a new company was introduced targeting children for recreational activities. The young ladies who had conceived of and created Toddlers & Co were wondering how they would fight the current and new entrants ... they recalled their grad level 6 MBA course on Marketing Strategies & Value Innovation and decided to explore the process and tools that they had gathered from there.

To select the fastest growing and leading company in recreational sector, the definition of the segment should be clear. According to Naics 2012 Industry definition, recreational segment comprises of a wide range of establishments that operate amenities or offer services to meet varied cultural, entertainment, and recreational interests of their patrons. Global brand rankings are done by 'Inter-brand' and their criteria include: financial strength, consumer choice/preference over its competitors, and brand strength. However, this company caters global brands only. In Pakistan, 'Brandsynario' do so for the local brands, but however this recreational sector of Pakistani industry is yet to be marked by. So, a criterion was selected in order to evaluate the rankings of the companies operating in this sector and it comprises of consumer choice/preference over its competitors, brand strength, schedule provided, and program's staff to child ratios. It was based on the criteria used by Inter-brand as well as by Brandsynario. And thus Dot & line was selected as the leading company and Happy Place was selected as the fastest growing company in the Pakistani recreational industry.

Michael Porter's five forces provide actionable insights about an industry profit potential. Bargaining power of supplier in this industry was low since the accessories such as papers, card sheets, paints, stationary etc. that were required for crafting activities were easily available at different stores and could be bought from there effortlessly. The other suppliers include the instructors, maids, guards etc. All these jobs do not require any special skill

and due to high unemployment rate in Pakistan they were easily available as well. Threat of substitution was high since customers have a lot of substitutes available. Parents could take their children to malls, amusement parks and local gardens at minimum costs. Other substitutes included tuition centers and day care centers. The bargaining power of buyers was high as there were a lot of options available and the buyers could switch competitors easily, but however there was registration fee as well that made the switching cost quite high and by doing so the buyers were left with the choice of trade-offs, i.e. to choose lower category options and to let go of many other options that the companies with registration fee offered. Barriers to entry in the recreational industry for kids were very low as anyone can easily enter this industry and start their own recreational business. One major reason was that the startup cost was very low. Another reason was the technological advancements in the last few years including social media, applications as well creative ways of doing the advertising through technology that was usually free of cost such as opening up a Facebook page was quite easy and sending invites to almost everyone you want. The intensity of rivalry among competitors was very high as differentiation among the offerings was low as well as many new companies were also entering this industry that made the competition more intense.

Some important factors that determined the advantage that various players in the industry adore includes price, location, visual appeal/decoration, credibility of organizers, quality of material used, safety, hygiene, arts and craft, storytelling, reading, creative writing, music and dance. The identification of the competing factors was based on the research to evaluate first if the competing factor is of importance to the consumers or not. Second the extent of a player's offering in the minds of the consumers, high, medium or low. The factors are explained below in detail.

Price was not taken as the value for money, but what the consumer paid in rupees. The value is the worth of a product or services that customer believes. But here price referred to the monetary value. Location is the area, locality or the place where the company is located. The location should be where people can reach easily and have access to even if it's raining or bad traffic jams in parts of the city. The site should be free from turbulences such as traffic jams, hard to reach locations, congested areas where cars cannot come easily to attend the event and have proper parking space etc. Visual Appeal/Decoration comprises of the elements perceptible by the sense of sight. Above the line, visual appeals that a company deploy to engage the audience and indulge in the essence of scenery to attract the audience and let them feel cozy and different than usual. This means that the venue should be relevant and consistent with the theme and it should be appealing and meaningful. Too much of decoration can also distract the audience, therefore the decorations should be set in a manner that may seem minimal but consistent and appealing i.e. the audience must enjoy while sitting there and looking at the decorations. Credibility refers to the trustworthy source attached with the company, such as famous artist for paintings is assigned for painting classes, or popular singer for singing classes for kids etc. This enhances the trust in the consumers about the service. For engaging kids and mothers, quality of materials used in crafting activities matters in terms of safety, freshness, brand and appearance. In some studies, it is found that quality is a hygiene factor, which is must to have in order to exist in the market, but in our industry where learning facilities are provided to kids, material quality matters in terms of brand used and cleanness.

Safety is the most important factor. As Parents are concerned for safety of kids so it is a must to make sure that the children of all ages are safe during the event. Anything which is poisonous is kept out of reach of children. There should be a proper first aid kit available in the premises with all products of first aid like bandages, thermometer, gloves, scissors, tweezers, petroleum jelly, pain killing creams and cotton-tipped swabs etc. Hygiene is yet another very important factor that cannot be over looked. There should be proper ambiance such as no smelly rooms; proper dustbins are there, availability of maids to clean in case of emergency, availability of etc. Arts & Craft includes the wide variety of activities usually making things with one's own hands. Activities such as coloring, drawing, painting, pottery, collage, sketching, and candle making etc. are included. Storytelling is the interactive art of using words and actions to reveal the

elements and images of a story while encouraging the listener's imagination. Reading is the process of looking at a series of written symbols and getting to mean from them. Creative writing is any writing that goes outside the bounds of normal professional, journalistic, academic, or technical forms of literature, typically identified by an emphasis on narrative craft, character development, and the use of literary tropes or with various traditions of poetry and poetics. Music is vocal or instrumental sounds (or both) combined in such a way as to produce beauty of form, harmony, and expression of emotion. Dance is a performing art consisting of purposefully selected sequences of human movement.

### Company Background: Toddler & Co

On February 1, 2016, Toddlers & Co. was founded by Maryam and Fatima as a recreational company. The story behind the creation of the company was to involve their own kids in activities that are fun and to let the kids express their creativity using colors and their imaginations. Soon many friends and family members started to reserve their seats in the events, and the word-of-mouth pulled many others. Events were targeted for the kids in the age bracket of 3 to 12 years. Events included summer and winter camps, one day program, and/or daily activities designed for kids & moms, after the school timings or usually in the holidays from the school.

Toddler & Co charged 650 PKR for per day event per child while for the camps that comprised of 10 days, the price was 3,000 PKR per child. A registration of 2000 PKR was also charged at the time of registration. Parents were not required to bring anything from home; everything was included in the package. The buyers considered this price as a good value for money when compared to competitors. They believed that almost all the activities such as reading, creative writing, storytelling and even the environment in which the children play and learn are worth it. There were two permanent locations in which Toddlers & Co. operate, DHA Phase 6 and Phase 4 Karachi. Toddlers & Co had sophisticated visual appeals, i.e. the place was decorated keeping in mind that too much of decoration can actually hamper and distract the attendees. However careful selection was done for decorating such as the use of simple yet colorful technique by the renowned Japanese artist Yayoi Kusamas. However, the decoration was mostly done using chart papers and crepe papers. Other than this decoration was done in a manner that the sunlight can easily enter the area and so the children can reap the benefits of it.

Toddlers & Co aimed to develop credibility by hiring professionals for each segment of activities, for example for reading and storytelling volunteers were also pooled in, and certificates were also distributed to the children and volunteers. Quality toys were used, and stationary was purchased from retailers in Karachi such as "Bacha Party" based in Clifton, a store that has children related stuff and their quality of products is well accepted amongst the parents in Karachi. The material was also purchased from Urdu bazar located in Sadar and Paras the art fever shop located adjacent to Khy-e-Bahria. So, there was a mix quality type of materials used at Toddlers & Co. However, the company had some strict rules about safety. The locations of events were decided based on safety. Maids were there to keep an eye on children and to help them. All domestic staff was hired after proper investigation and their contact details along with CNIC were also kept under the management's hands. But there were no equipped guards deployed at the doors for extra security. Toddlers and Co. only kept relevant things on the table which were of use during the activities and no other things were kept in the room to avoid any mishap. First aid kits were also installed and kept handy. In the premises children friendly furniture was kept. Though the company was new to the industry, yet it was maintaining the hygiene standards and made sure that the supplies used during activities were safe and hygienic to use.

Toddlers & Co instructors had vast experience in conducting different activities including arts and crafts, creative writing, painting etc. to ensure kids learning. However, the crafts related activities were usually done using papers only and could be improved. Toddlers & Co had an active facebook page where they posted all about their upcoming events and guide their customers as to how they can register for the event. For reading different sessions were conducted according to the age groups of children, such as skimming, sight words, and intensive & extensive reading. However, the reading quality was not very remarkable and considered as below average. There were sessions conducted for creative writing for all ages starting from 3 years. In the 3 to 6 years age group, different techniques were used such as inculcating habit of writing and forming sentences. However upper level creating writing focused more on drawing something related to the theme and then explaining it in your own words. There were no music and dance classes happening in Toddlers & Co. however rhymes and poems were recited with all the movements. Dot and line

Dot & line, the leading company in recreational sector, was considered as an alternative learning environment after

school. There were workshops for children from 9 months to 12 years of age. Parents loved to visit this place and spent some quality time with their kids. The rates were starting from 7,000 PKR. The price varied depending upon the program selected such as Jazz Jr or senior reading etc. There was also a registration fee of Rs. 10,000 per child. A 50% discount on the second child for the registration only was given as well. It was located at Lane 7, Bokhari Commercial, DHA Phase 6 Karachi. Dot and line were a well-equipped and fully decorated place i.e. they were focused on changing the appeals after every camp or event ends. They wanted to emphasize that being in a fully decorated place; the creativity emerges in the attendees. Dot and line being leading company in this industry was following credible approaches in making their curriculum effective in after school learning. They used Orff Schulwerk approach for music classes which is a developmental approach in music education; they used Orton-Gillingham approach in reading programs which is an instructional approach for corrective reading and pronunciation. Their cooking courses were affiliated with Okra & Le Cordon Bleu-trained chef, which is one of leading chef institution of Australia. Their material was of very high quality and there were guards and maids for the safety of children; they also made sure that they use stationary that is safe and should be purchased from high end retailers such as Bacha party, Billboard etc.

Dot and line Team included designers and curriculum developers who had experience in their relevant field. Their team included mathematicians, child therapists, child psychologists and crafters. They also partnered with one of the best talents for their workshops and different programs/sessions which included okra trained chefs, musicians, architects and engineers. Okra is one of the best fine dining restaurants because they always keep on experimenting with its ingredients and recipes and constantly try to change their menus and dot and line had hired their chefs for their culinary program which was related to cooking and presentation of food. Dot and line had musicians for their baby jazz mornings where babies were exposed to new sounds and sensations and music or instruments and jazz tunes. All this information was obtained through their face book page, website, and asking their customers.

At Dot and line hygiene of children was taken very seriously. The company put the plastic sheets on the floors for painting sessions. The company was on leading position because of its hygienic indoor setting. Hygiene conditions and practices were helping the company to maintain

health and cleanness setting. Dot and line offered arts and crafts activities such as coloring, painting, collage, sketching and also gave classes related to art history. But was very similar to what other competitors were offering. There were story telling session on every Friday. The sessions were designed for both members and non-members as well. The fee for members was PKR 500 and for non-member PKR 1000 per session. Dot and line offered two batches for reading and creative writing, one was for the senior level and other one was for the junior level. Both the activities were provided with proper considerations, such as if a child was not following they put-in extra to make sure that the child grasped the content before moving forward. Music and dance class was also offered by Dot & Line, along with proper instruments and skilled teachers to let the kids understand and learn.

### Happy place

Happy place was created by Hiba Masood who is by profession a storyteller and an educator as well. She was well known as Drama Mama. Happy place was a community center where families meet to sing, dance, paint, read, jump & play. The major theme behind its creation was to develop social and technical skills in kids. Their activities revolved around storytelling, arts and crafts, music, dance, family bonding and sports.

Happy-place charged 5,000 PKR to 15,000 PKR, depending upon the program selected. After the results of questionnaire, many customers considered this to be too expensive. It was located in Phase 2 DHA, Karachi. Happy-place believed strongly in the visual appeals and kept on renovating quite often. The recent renovation was quite good as compared to their previous level. Their activities were designed under supervision of trained therapist and psychologist with careful segregation of each age group.

Happy-place not only had their face book page, but its owner also had a proper YouTube channel for parenting and guidance etc. The company was growing at a faster pace and the major reason was their safety and hygiene standards. Cleanness and safety were emphasized again and again on their social media page. Happy-place offered a combo of story, reading, art and play. But the quality of these activities was above average but not very exceptional. Many customers switched from them because of the reason that they were charging quite high, but the quality was not optimum as perceived by many customers. Customers assumed that there were basic arts & craft related activities such as using empty tissue paper rolls and glitter to showcase arts &

crafts, but they could do better than that such as creating 3d cards or canvas paintings etc. They offered music and dance class not only for the kids but for their dads as well. But this only included move and groove kind of thing, such as the parents was supposed to sing along with babies and made them move. Their focus was more towards the development of social skills in children along with the sensory skill enhancements for small infants.

In this business the main source of revenue was the registration fee which was charged annually and the program fees which were charged for every program organized by the companies. Dot & Line charged the highest fee annually as well as per program basis. The registration fees and fee per program of happy place was slightly lower than Dot & line. The registration fee of Toddlers & Co was only 2000PKR which was quite less than the other two competitors and the fee per program was also very low as compared to other two companies. Staff salary of Toddlers & Co was a small amount because of the number of people working in the company was less whereas Dot & line and happy place had more staff and hence more cost was involved.

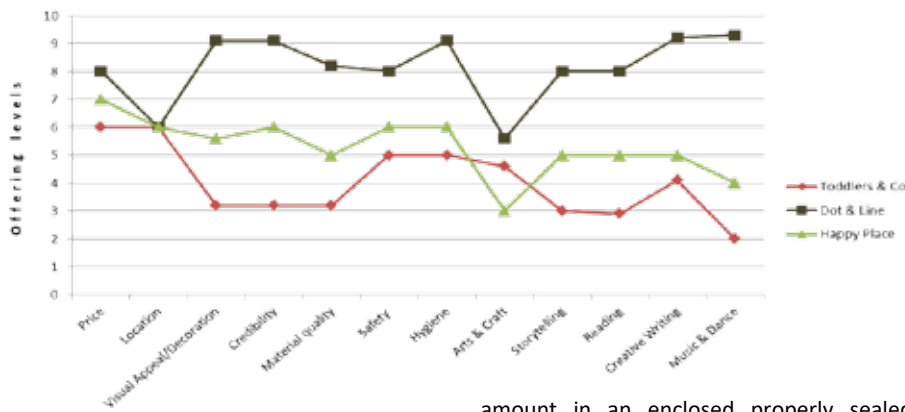
The cost of decoration for Toddlers & Co was low because the venue was just decorated with chart papers and other hanging stuff. On the other hand, the decoration of Happy Place was the highest because they had just renovated the place and a lot of work was done on the decoration of the venue. Also because of their continuous renovation, the cost was quite high comparatively. The decoration of Dot & line was slightly less than the Happy Place. Dot & line was bearing the highest material cost as compared to Happy place and Toddlers & Co but all three of them were maintaining the quality and purchased material like stationary and other stuff from best shops in town. Dot & line had the highest marketing cost as it was using different mediums for marketing that comprised of: maintenance of website and advertisement on social media etc. Happy place was also using different mediums for marketing, but the company was not maintaining any website and the only online medium they were using was Facebook so all they bear was the social media maintenance cost. Toddlers & Co.'s marketing cost was low because currently it was not using any social media or website that charged, rather used only a free Facebook page. Word of mouth was the only medium that was used to promote the company.

In the current industry it was very important to give market compatible salary, Dot & line which was the market leader gave the highest salaries to the people working with

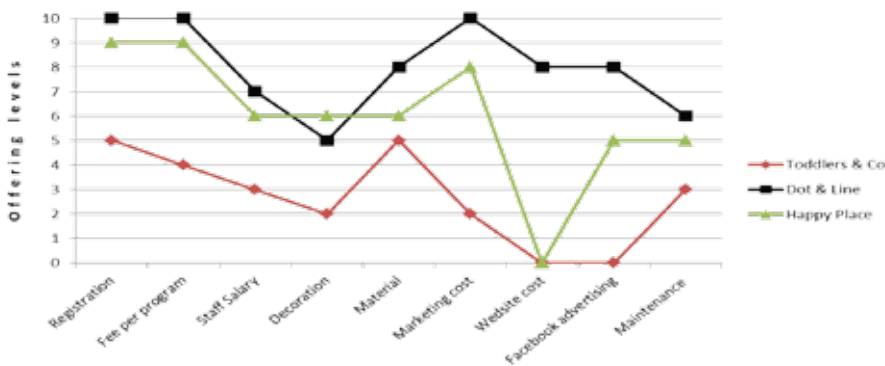
them, Happy place was giving slightly less salaries and since Toddlers & Co was new to the market, so salaries were the lowest. All the three companies gave rewards for motivation of their people and certificates and discounts for the customers. Certificates were distributed to both the employees as well as the customers. Dot & line gave more rewards as compared to Toddlers & Co. Dot & line and Happy place also gave discounts on registration of members whereas Toddlers & co did not offer any discounts now.

Questionnaire was made to gather the responses for the key competing factors from both current customers as well as non-customers to get better insights about how important each key element is in their preference and what weightage they put for each factor with respect to the companies. Because of limitation of time, only the following areas were covered for respondents: DHA, Clifton, Gulshan-e-Iqbal, Nazimabad, Korangi and PECHS.

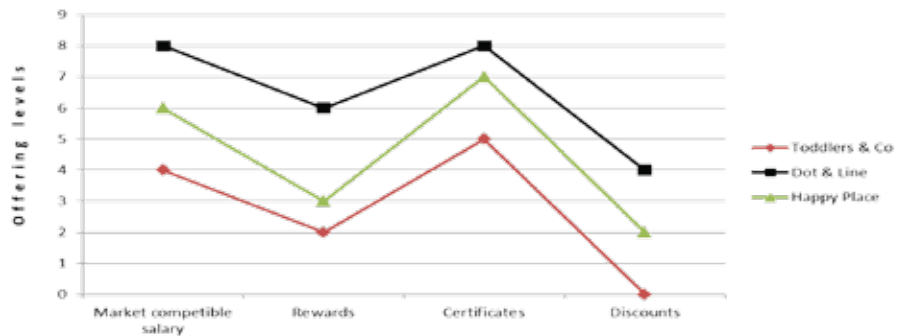
**Exhibit 1.1** As-Is Strategy Canvas: Value proposition



**Exhibit 1.2** As-Is Strategy Canvas: Profit proposition



**Exhibit 1.3** As-Is Strategy Canvas: People proposition



### The User Experience

The reservations or booking of seats for the events and camps was simple such as all the relevant information regarding how to get registered was conveyed at the time of the booking and the parents were required to fill the form which comprised of the kids Name, Age, school, mother and father name and their contact numbers. So, it was a wow point for the customers. Parents were supposed to make payments by visiting the place physically. They can either drop the

amount in an enclosed properly sealed envelope at the gate and after dropping, they were required to message immediately to the concerned person in order to receive

a confirmation. That seemed to be a tedious process overall from parent's perspective. Financial risk and safety risk were also involved, such as when the parent drop-in the money they kind of felt insecure unless they received the confirmation call or SMS and beside they did not have any written proof of the deposited amount. Sometimes the customers considered that may be the

money wasn't worth spending at such places for kids, and wanted to spend the same at Malls with different set of activities i.e. play pods, amusement rides, sand-art etc. because they assumed that it is more or less like a school and no element of fun was associated.

The customers had to come to the place of event in order to avail the services of the event provider. i.e. the parents were required to drop their kids to the location where the event or program was and there was no way that could help the parents get things done better and faster and to improve the productivity of parents/guardians. The dates of the events were announced at least 3-weeks prior to the event so the customers can mark their calendars easily and to avoid any clash in the dates. This made the delivery unpretentious. The use of the services required assistant and without the facilitator the children won't be able to carry out the activities. For this purpose, highly trained facilitators were provided to engage the kids in activities and carry out the work properly such as painting, crafting, creative writing etc. Therefore, parents were not supposed to be seated along with their kids hence making the process convenient for the parents. There was fun appeal in using the services, such as the parents could drop their kids and spend their time the way they want. And the kids also had fun with all the activities that was usually not allowed to be done at home, for example hand painting, throwing color paints and coloring walls with abstract art and designs etc. Some parents found it annoying as to visit the malls after dropping the kids and then calculating the time required to leave the place and pick the kids on time. It seemed to be tedious and required extra care and attention when the service was in use. The products used were green such as organic paints were used along with paper bags in order to avoid polluting the surroundings.

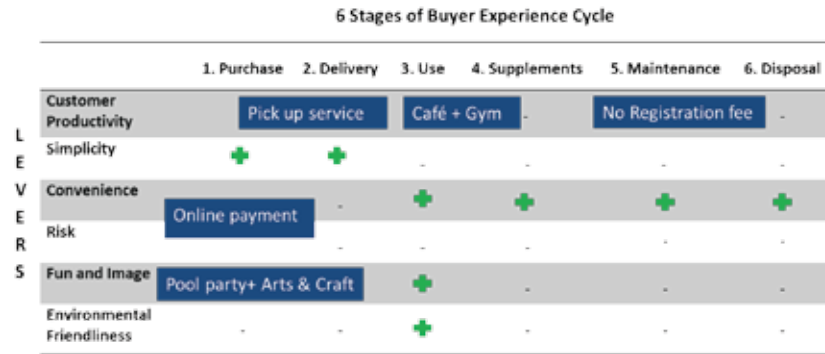
Useful appealing accessories were used as per the activity of the day, such as if showing Spiderman movie, spider man printed stationary and accessories were provided to the kids by the recreational company.

Customers did not have to bring anything special to make the service work, it was being provided by the organizers. The parents were locked into a contract for a year by paying the registration fee. And hence seemed to be a tedious process because once they want to re-register the kids, they will have to pay the registration fee again for every year they were enrolling their kids in. Activities were scheduled by management and updated on website and social media page so that customers could select the program according to their availability. Pre-booking of events was there so to avoid any clashes. Telephone numbers along with email and Facebook messenger id was provided for the convenience of the customers. If after dropping the sealed envelope the parents failed to inform the management about their drop offs, the customer will had to face the cancellation of the seat and hence emotional risk was involved. The termination of the contract was easy and simple. The customers did not have to come to the place to cancel the subscription of their child; rather on phone it can be done. And the disposal was not costly as well.

The above details were the result of focus group conducted at different locations with non-customers such as, DHA, Korangi, Clifton, PECHS, Nazimabad and Gulshan-e-Iqbal. Buyer utility map consists of a total of 36 spaces and according to our focus group survey only fourteen spaces were occupied with the current offering of the industry. Out of that eight were the wow points while the rest six showed some form of distress from the non-customers point of view.

Exhibit 2 Buyer Utility Experience: Overview of Industry's offering

Exhibit 2.2 Buyer Utility Experience – Addressing Pain Points



Non-Customers

For Toddlers and Co., the customers who sat on the edge of industry and used the services minimally were the families with toddlers who were living abroad but often visit Karachi. Since Toddlers & Co. was located in DHA therefore the families living far away, who consider time and day feasibility were also considered in the first tier of the non-customers. If we look into the matter of law and order situations of this city parents of kids under age twelve were concerned about their safety and they did not feel comfortable to send their kids for after school learning activities in areas away from their homes. These first-tier non-customers were always in search of optimal solutions and they shifted very quickly as soon as they got better opportunities. Approximately 7.6 million Pakistanis were living abroad. Assume if 2% of this group belongs to Karachi and visit Karachi time to time, so it will be around 152,000. Total population of Karachi was around 16,051,521 and 1,791,751 were living in DHA only. The remaining 14,259,770 were living in areas other than DHA. This tier could

be roughly around 4 million excluding the extreme far flung areas.

People who refused to use these recreational services were the families with low income, those who could not afford such services after paying heavy amount of school fees. In addition, those people with lack of awareness of such services introduced in the city, or parents who consider after school learning as least important because they assumed children should not be given burden to learn. Those kids who go for tuitions after their school time who remain busy in studies were considered in the second tier of the non-customers. There was a group of customers who wanted to spend time with their kids. This service was offered by the competitors of Toddlers & Co and so the group rejected our offerings which were solely for the kids. According to an article around 50.5% of the total population in Karachi lived below the poverty line. The estimated tier size would be approximately equal to 8 million.

Unexplored market comprised of orphans; those who were living in the orphanages and did not have families to look after. Second category was parents who did not have kids to spend time with. Another group was the physically and mentally disabled kids who would require special treatment for learning activities. Street children could also be considered under the third tier of non-customers. According to Dawn, there were about 15000 children under the age of 12 living on streets. And that's a remarkable number. Last but not the least our survey resulted in another category of unexplored customers that were the elderly people who also required to be treated as kids and required some fun engaging activities to spend their time happily. These non-customers had never thought about the offerings of recreational companies and were considered as unexplored market. The estimated tier size was nearly 10 million.

Exhibit 2.1 Buyer Utility Experience (Pain & Wow Points)

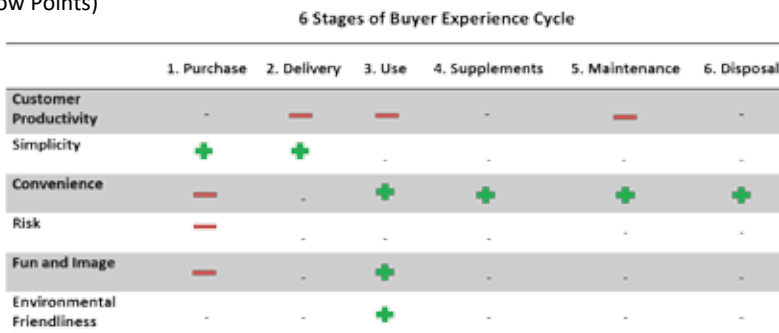
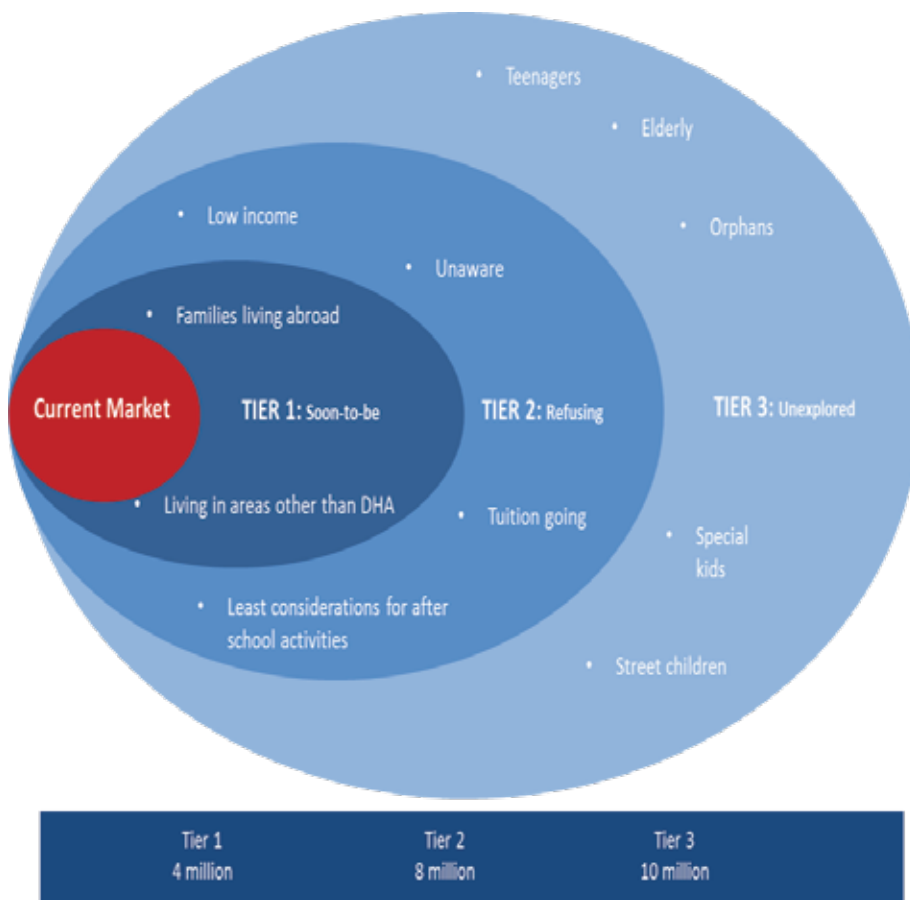


Exhibit 3 Non Customers



kids. Recreational means an industry offering fun activities for enjoyment,

entertainment because they believed entertainment was a waste of time and activities that may enhance the skills were more important when it comes to learning and fun. There were non-customers who believed that entertainment was better than recreation because they got a chance to spend quality time with kids.

In the second path looking across strategic groups, the businesses within an industry that pursue a similar strategy, can generally be ranked in a hierarchical order in terms of price and performance. Toddlers & Co falls in fun & recreational strategic group. The higher strategic group comprises of Science & learning and MAD school, the lower strategic group consists of Islamic manners and teachings and homework solutions. The commonalities in the focus group said that they trade up for the higher strategic group because of social class issues, peer pressure and renowned reputation of the service provider. And they trade down for the lower strategic group because of the monetary problems and close by location of the service providers. Customers were willing to trade off because of location and low-price offerings. Another group of non-customers that was focused on instilling the Islamic mannerism and knowledge in their kids traded off to lower strategic group. Non-Customers were trading up because of peer pressure and the reputation of service provider. They loved the vocal or instrumental sounds and wanted to teach their kids how to play and have fun. While for trade downs there seemed to be a burden on kids and they were missing the fun element.

Reconstructing Market Boundaries

Reconstruction of market boundaries was very important in order to identify the haystack of potentials that exist in the market or that can be created. It comprised of: Industry, Strategic Group, Buyer Group, Scope of Product or Service Offering, Functional-emotional Orientation and Time. Focus group was used to collect the information from non-customers. A total of 4 focus groups were conducted. Due to the limitations of time and availability of non-customers the number of focus group was four. In the first focus group industry, strategic group and buyer group was discussed. The second focus group was conducted with the area of discussion regarding scope of product or service offering, functional-emotional orientation and time. Third focus group was regarding industry, buyer group and functional-emotional orientation. Finally, the fourth one was related to the strategic group, buyer group and scope of product or service offering.

amusement, or pleasure. Learning means the acquisition of new or modification of existing knowledge, behaviors, skills, values, or preferences. Entertainment industry means activities that provides a diversion or permits people to amuse themselves in their leisure time, and may also provide fun, enjoyment and laughter. It comprised of amusement parks, theaters, malls, play pod etc. Recreational and entertainment was more or less the same, but the only difference was the types of activities involved such as summer camps or programs designed to involve participants to enhance their skills such as paintings to express themselves etc. was categorized under the recreational industry, while events intended for public viewing such as live performances, theaters, cinemas, amusement parks etc. was categorized as the entertainment industry (North American Industry Classification System).

The objective was to identify the problems or needs that the focal industry currently solves, and then to identify other solutions that satisfies the same needs, or addresses the same problems, for noncustomers in alternative industries. Non-customers selected recreation over learning because of fun, and selected learning over recreation because they were towards learning and wanted skill development. Further non-customers selected recreation over

In the third path looking across the chain of buyers, the chain of buyers in the Industry comprised of User: who were the kids, Purchasers: were the parents, siblings and orphanage institutes, and Influencers: were the grand-parents, teachers, family/cousins, society, neighbors, and existing customers. Currently the industry typically was focused on parents and guardians i.e. the purchasers. In order to shift the focus to the user and/or influencer to unlock new value, Toddlers & Co. could offer referral discounts, outside recognition, and influence by the class teachers. Non-customers wanted their child to be more creative, more knowledgeable than they were before attending such classes. Collaboration with well-known stores could also work.

In the fourth path looking across complimentary products & services, three set of activities were classified, i.e. before, during and after. Usually the non-customers cook the food, made their kids ready, arranged cars and funds in order to do the registration if not done prior. Amazing commonalities for during were: form



completion, visit to shopping malls and tailors, read story books, relax, visit relatives, go to gym, watch movies, prepare presentations, and even spend and plan day outs with friends. Finally, after the event, they feed the kids, change clothes and complete the home assignments if there was any. Four pain points were identified across the context in which Toddlers & Co's service was being used i.e. getting kids ready, arranging funds in cash and required format, breakdown of car and availability of time to pick and drop kids. To eliminate these pain points through a complementary offering, Toddlers & Co could provide free pick up service and online payment methods. Non-customers and customers wanted to relax when the kids were not around and want to spend their time by reading a book, visiting malls, relatives, and enjoying desserts and coffee. Most notably a huge response was gym and movies. For this Toddlers & Co can also provide gym section for parents/guardians or even a mini theater.

In the fifth path looking across functional vs. emotional orientation, the current industry's orientation was towards both. There was a huge space that can be filled by enhancing further the emotional appeals, such as the result of questionnaire suggested that mostly parents prefer play pods or malls etc. just to have more fun, so their children won't consider it to be just like school.

In the sixth path looking across time, the industry was supposed to grow huge because of the trend of working women, which was increasing every year. And hence could have a substantial impact on businesses because it shapes what buyers' value over time, i.e. more relaxing time would be required along with kids at a proper place to have fun and learn something as well. Given this, Toddlers & Co could open up unprecedented customer utility i.e. new activities for cognitive and analytical skills and confidence building for kids can be introduced along with love and care. Further non-customers were shifting to internet of things, and thus they want such things to be inculcated in their routine tasks. Hence an attractive website, active Facebook page along with online payment methods would be able to cater a whole lot of new customers.

## • Exhibit 4 Six Path Framework

Six Paths	Key Ideas & Insights
Industry	focal: recreational industry alternative: education, entertainment, Day care
Strategic Group	Trade up = peer pressure and the reputation of service provider & love for vocal or instrumental sounds Trade off = location and low price offerings or focused on instilling the Islamic mannerism and knowledge in their kids
Buyer Group	Current focus: Purchaser - Non-customers want their child to be more creative, have fun
Scope of Product or Service Offering	Non-customers and customers want to relax when the kids are not around and want to spend their time by reading a book, visiting malls, relatives, and enjoying desserts and coffee. Most notably a huge response was gym and movies
Functional-emotional Orientation	Orientation is towards emotional plus functional appeals.
Time	More working women - A website - more activity on social media - an online registration and payment process, CC TV cameras

## Four Actions Framework

In order to reconstruct buyer value elements for constructing a new value curve for the recreational company, the four-action framework was used, comprising of: eliminate, raise, reduce, and create. Based on the current offering levels, their importance in the eyes of customers and the buyers experience cycle, the first thing should be to reduce the price and increase its value, i.e. to offer more activities but in less amount. At this point the profit appeared to be decreasing, but that can be covered using the create option in the four-action framework. To compensate the profits, an addition will be done as in a non-for-profit section in business model in order to cater the third tier of the non-customers, i.e. the street children etc. The profits will come from philanthropic donations. As Pakistan is amongst the top countries list for charitable activities, and thus catering the new market space would be easy. The importance of factors such as credibility, material quality, safety, talent of instructor, and hygiene can't be compromised in this kind of business where children were involved. And based on the results of the questionnaire, as parents were more concerned with these issues therefore these can further be raised for Toddlers & Co. As the current location of Toddlers & Co and its competitors was DHA. The company can raise the location element by opening its center at PECHS society. The reason for opening its office at PECHS could be to provide conveyance to those non-customers to whom reaching DHA was not easy because they lived in areas away from that location. The arts and crafts activities will be raised further because most of the parents required reasons to send their kids to these events organized by the company as they consider these events similar to schools. As majority said that what is the point of sending their kids to these events when they can take their kids to malls or play areas

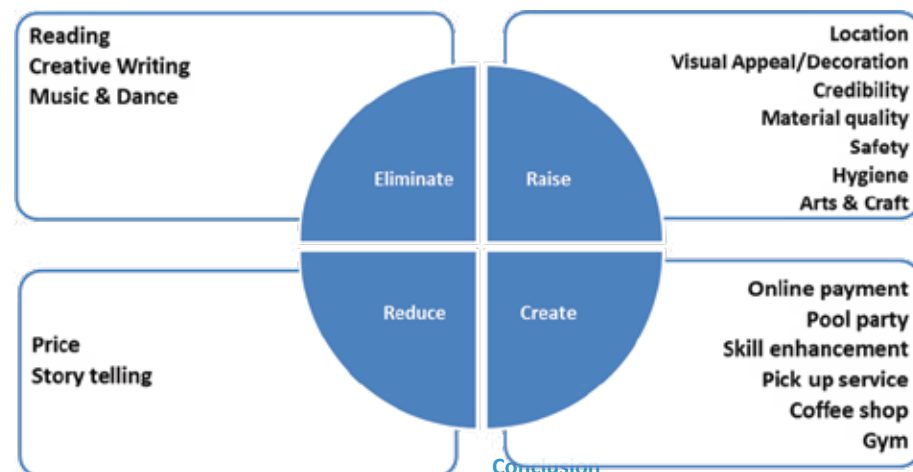
where their kids had fun and enjoyment. To best use the create option, and to cater the concerns of parents, Toddlers and Co will have an option to add the following activities so that the kids can have fun and enjoy along with learning and skill development, such as: creative drawing activities, collage art where they can make a collage of different images created through this art activity, clay and play dough activities for kids, stained glass and sun catcher crafts (capture light and color in a magical way), water color projects for kids including water color activities etc. Visual decorations will be raised as well, as now the location was only decorated with chart papers and some more materials which were pasted. Plan will be to give the place an artistic look with graphic paintings which will be more attractive for children. Reading, Creative writing, Music and dance will be eliminated completely as competitors Dot & line and Happy Place were more focused on these elements and Toddlers & Co will focus on after school entertainment because parents wanted to give break to children from studies and inculcate fun. According to the conducted research, parents were more interested in learning through activities rather than academic learning. Story telling will be reduced because there were so many other activities for entertainment of children. They were usually more interested in fun activities rather than educational activities. The results of research showed that parents considered story telling as a fun activity too so Toddlers & Co will only reduce it to keep the learning element alive.

Today the word is revolving around the use of technology and therefore its importance can't be denied. Toddlers & Co can introduce the online payment methods which would be a solution to solve the pain point the consumers feel when they purchase the services of recreational

companies, such as Happy place or Dot & line. For the mentioned companies the customer must come to the office of the desired company and drop-in the amount by themselves prior to the event. And according to the results of questionnaire, many non-customers found the process difficult. The price and story-telling were reduced so to cater the problem that usually parents were facing considering it to be more like a school alternative and created pool party options as well. To fix the issues pertaining to the availability of space or to find a suitable place to stay while the kids enjoy the activities coffee shop and gym has been added to the create part of the ERRC grid. Some parents who lived in far flung areas usually miss the programs because they considered it difficult to reach and have car issues, for that carpooling option has been introduced. Finally, to cater the third tier, programs can be introduced in such a manner that involve the kids as well as the grandparents or older people, those who does not have any grandchild or were living in old-age houses.

The revenues can come from donations and opening of onsite gym and coffee shop so that parents and other attendees can have a place to go and relax while their children were attending the program. The staff salaries will be increased, there will be an increase in marketing expenses as well as the maintenance cost but can be covered easily with the new proposed business model with innovations. In order to attract the influencer or the purchasers further, there should be outside recognition for more motivation for its people, such as giving coupons discounts on outlets like Bacha party or even Sindbads etc.

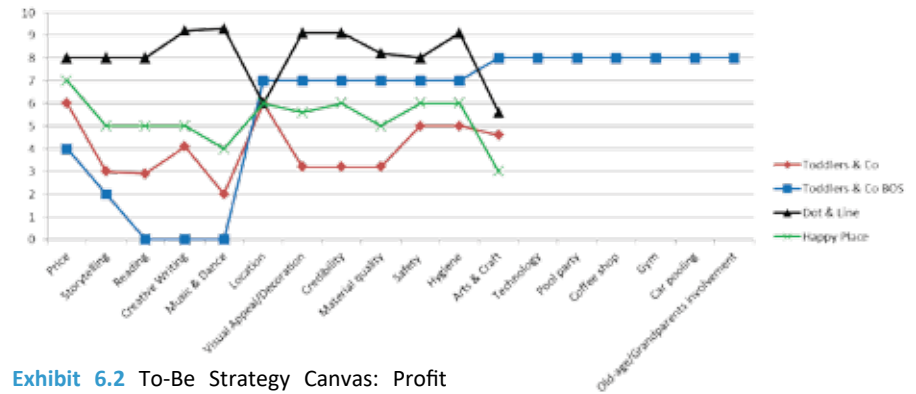
**Exhibit 5:** The ERRC Grid



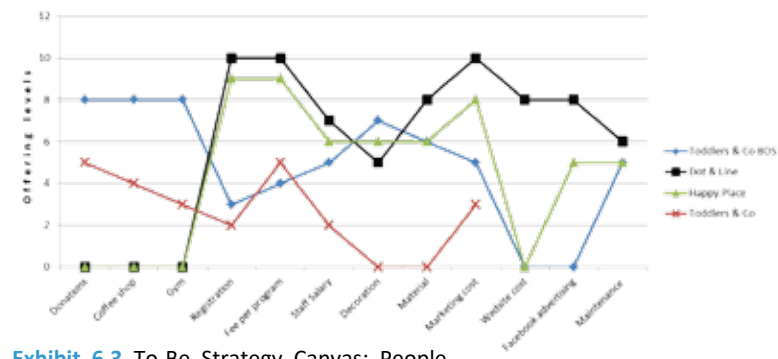
**To-Be Strategy Canvas**

Based on the exploration of three tiers, buyer experience cycle, and the six path framework we made the ERRC grid and constructed the to-be strategy canvas for Toddlers & Co.

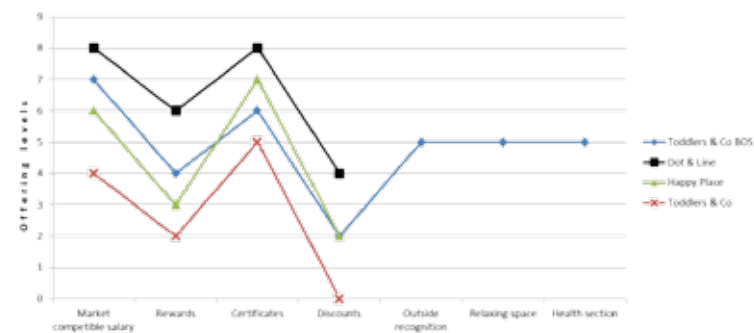
**Exhibit 6.1** To-Be Strategy Canvas: Value proposition



**Exhibit 6.2** To-Be Strategy Canvas: Profit proposition



**Exhibit 6.3** To-Be Strategy Canvas: People proposition



ocean strategic move or they can opt for the same business model in which they were

currently competing upon i.e. to beat the competition and exploit existing demand. Two perspectives lie in front of them: “defend their current position” or “innovate & pursue new opportunities”.

**Questionnaire 1: Importance of Key Competing Factors**  
**Results of Questionnaires**

*Insights*

The above questionnaire was used to judge the importance of key competing factors derived by the team after talking with a number of about 10 people. The results are as follows:

A sample of 40 customers was selected carefully comprising of those who send their children for recreational activities to different companies, even other than the mentioned three.

Majority of the respondents said that the prices charged by many companies are quite satisfactory, though they are not willing to

pay any more for the same set of services. The most preferred location was DHA and Clifton followed by PECHS, Bahadurabad, and Gulshan. Majority of the respondents said that the more beautifully the place is decorated for kids the better the chances are that kids will love the place and would like to stay there. So the better the decoration and visual appeals are the better the chances are that the parent/guardians would love to send their kids in. It was quite apparent that almost all the respondents agreed that hygiene, credibility, quality of material and safety are very critical for businesses dealing with the kids, and their importance cannot be compromised. Majority of the respondents said that the use technology such as apps and/or interactive devices for activities in events should not be allowed. The major reason behind this was, as majority wrote that, they are already using such devices at home and they do not wish their children to use such devices all the time and so it should not be allowed at all. Majority of the respondents said that when sending their kids to such places they want their kids to get engaged in activities like arts & crafts, canvas paintings, baking, pool party and play with colors. Some of the respondents said that they would like the organizers to give home-made fresh refreshments to their kids but many said that they would not opt for refreshments.

## Questionnaire 2: Offering Levels of Key Competing Factors

### Insights

A sample of 33 customers was selected that have used the services of any of the three companies, Toddlers & Co, Happy place and Dot & Line.

Majority of the respondents said that the prices for Dot & line are quite high but at the same time the quality of spending is worth it, because they said that they are quite satisfied with the services of the company. But they are not willing to spend any further amount for such services. They said that the location is easily accessible and there seems to be no issues for the parking space as well. The respondents were very happy and satisfied with the offering levels for visual appeal. They said that the credibility of the Dot & line team is high as they said that they are using high profile personalities in relation to the task requirement, such as okra-trained chefs, musicians, etc. The story telling sessions are very creative and healthy for the children along with reading and creative writing. Music and dance is really energetic and compelling at Dot & Line.

The research reveals that the Happy place is charging high rates while as compared to many other services provided by different companies. Respondents are quite satisfied with the location of Happy place and its

decorations inside and outside the arena is attractive and kids love to go there. However, the respondents said that only the word of mouth and reference of Hiba Masood helped us find the place otherwise it would have been difficult to find the place. However, there are usually celebrities present as well that increases its credibility. Majority of the respondents said that they are satisfied with the material quality, safety and hygiene standards followed at Happy place. Many respondents said that the storytelling sessions are good and very engaging but the creative writing and reading though is there but is not very much emphasized and however their music and play thing is really pleasing and kids enjoy a lot.

Majority of the respondents said that they are very happy with prices offered by Toddlers & Co. and find its location easy to access. Many respondents liked the appeals for decoration, very colorful but still lack professional touches such as proper painting and linkages with arts. Majority also said that they only sent their kids because they are familiar with the owners and otherwise if they didn't know them they won't send their kids to such locations. Similarly, they find they quality of some materials below satisfactory levels such as the paint containers or the canvas quality etc. They find a need for safety only when it comes to stairs, as they said that they staircase seems to be the reason for not sending he kids alone and mothers have to come up to drop the kids. Almost majority are satisfied with the hygiene standards at Toddlers & Co. Arts & crafts activities are loved by many but majority said that there can be more done in the time for arts and crafts. Majority find the reading and storytelling to be more like school. Creative writing was appreciated by any respondents but finds music and dance to be just below the average.

## Questionnaire 3: Buyer Utility Experience

### Insights

Majority of the respondents said that they are comfortable to purchase the services of event organizers in Karachi for kids but are dissatisfied with the process of registering a child for an event or program because of the time efforts and complex process involved in the payment. They said that online payment would be much easy. However, they find it very simple when it comes to finding such services and entertainment places for kids. A huge chuck also said that they find such services to be boring and something school like because of the activities involved such as reading, writing, and coloring etc. and thus their experience with the companies is discouraging.

Respondents find it a bit difficult to settle the time because there are only 2 to 3 hours of fun scheduled for the kids and therefore

time management mostly becomes an issue such as if they drop the kids to the place and then go visit a friend, they have to keep a check and balance on time. Majority said that the painting, colors and other accessories used by the companies are really appealing. Many respondents said that there should be some testimonials and customer reviews to satisfy the doubts for such event organizer does the service for kids. Majority also commented that the registration fees is quite annoying and becomes difficult sometime to cater. They said that there seems to be no issues as to when can we end the contract with the service provider.



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# From Passive Listeners to Active Curators: How On-Demand Music Streaming Transformed the Hong Kong Listening Experience

By Zion Lee

## Introduction

In recent years, the prevalence of music streaming services has been widespread in Hong Kong. Notably, worldwide platforms such as Spotify, Apple Music, and YouTube Music have emerged as the primary channels through which individuals explore and engage with music. In the past, the influence of radio DJs and record stores played a significant role in shaping individuals' musical exposure. However, with the advent of personalised playlists and on-demand access, consumers now possess an unparalleled level of control over their listening experience.

The advent of this transition has evoked a sense of nostalgia for the age before to the prevalence of streaming, during when the act of listening may be considered more passive and characterised by a greater degree of homogeneity. In the absence of the capacity to selectively skip tracks, individuals with an affinity for music were compelled to endure songs that fell outside their customary preferences, as determined by radio programming or the sequential arrangement of songs on an album. Although characterised by limitations, this setting also facilitated fortuitous findings and provided a well-rounded repertoire of music.

In the present day, a reversal of circumstances has occurred. The act of streaming audio content provides individuals with the ability to independently build personalised listening experiences that are tailored to their current emotional state or preferred musical genres. Nevertheless, the emergence of this fragmentation has the potential to lead to isolation and a reduction in the breadth of musical experiences. Therefore, the evolution of Hong Kong's media consumption and culture, from forced listening to empowered curating, offers valuable insights into the impact of technology on these aspects.

## The Pre-Streaming Past: Limited Choice Dictates Listening

Before the 2000s, the music consumption patterns in Hong Kong were predominantly influenced by traditional forms of media, such as radio, television, compact discs (CDs), and cassette tapes. The listening experience provided was somewhat restricted and passive, although it fostered a sense of collective exploration. In the realm of music broadcasting, a limited number of stations, such as TVB Jade Solid Gold and Commercial Radio, held significant sway as prominent tastemakers. These stations' DJs played a pivotal role in acquainting the general public with new songs, so shaping mainstream musical preferences. The audience had limited agency in determining the content that was broadcasted within inflexible programming schedules, which predominantly featured commercially appealing popular music tracks alongside promotional messages.

The act of skipping songs was considered inconceivable, hence necessitating a passive listening experience to whatever content was broadcasted. Although music enthusiasts had the option to acquire albums and mixtapes, the listening technology available at the time was quite basic. Vinyl records, cassette players, and CD players in the past facilitated sequential playback, albeit with limited customization options, such as the ability to repeat discs or fast forward. The absence of genre filters, personalised recommendations, and extensive libraries was evident. The extent of listeners' action was limited to the selection of a radio station or the act of hitting the play button.

The absence of options compelled Hong Kong audiences to passively assimilate a wide range of musical content. Audience members were unable to confine themselves only to their preferred niche preferences, as they were subjected to a diverse range of musical genres including mainstream pop, Cantopop, jazz, classical, and others. Due to the restricted range of media types available, even individuals who were not particularly devoted to music were able to keep a comprehensive knowledge of popular songs that were performing well on the charts. Although major label musicians

were prevalent, independent acts had the opportunity to make progress by receiving DJ spins or appearing on television, which provided them with public exposure that would otherwise be challenging to attain. During the contemporary period, the experience of encountering an unexpected song on the radio presents an exhilarating opportunity for musical exploration beyond one's customary repertory. Audiences had a favorable response toward the incorporation of randomization and unpredictability regarding the subsequent musical selection. The act of enduring musical compositions has the effect of solidifying their presence into the collective consciousness, irrespective of an individual's level of devotion to the particular genre or artist. The collective adoption of shared listening habits in Hong Kong served to consolidate its cultural identity rather than causing its fragmentation into disconnected echo chambers.

## The Rise of Personalized Streaming Playlists

The advent of music downloading in the early 2000s initially offered valuable insights into the possibility of improved personalized listening experiences. Platforms such as WinMX, BitTorrent, and Foxy have permitted the personalized selection and subsequent downloading of music or albums onto personal computers and early MP3 players. The emergence of personal mixtapes has replaced conventional radio programming as a prominent factor in shaping individuals' musical exposure.

The introduction of YouTube in 2005 offered an additional platform for accessing music on demand, enabling fans to construct playlists consisting of their preferred music videos. During the mid-2000s, there was a significant shift in the music industry where digital downloads surpassed physical sales, so establishing the groundwork for the subsequent rise of streaming as the dominant mode of music consumption. The ability to discover music was no longer contingent upon the offerings of radio stations, record stores, or television channels.

The advent of streaming services, such as Spotify, marked a significant milestone towards the realization of complete musical autonomy, which was eventually introduced in Hong Kong in 2013. Users can conveniently and expeditiously retrieve extensive collections of both domestic and global music using various technological devices. Playlist algorithms utilize data analysis techniques to examine listening trends and generate personalized song recommendations that align closely with an individual's musical preferences. Characteristics such as the ability to skip songs without limitations, subscriptions that eliminate advertisements, and tools to adjust playback speed enhance the ability to curate an optimal listening experience devoid of other tracks or interruptions. Contemporary audiences possess the ability to confine themselves to particular subcategories, temporal contexts, and emotional states. Jazz enthusiasts possess the ability to select playlists that cater to their preference for either tranquil or lively musical compositions. It is possible to only engage with popular Cantopop songs that topped the charts during the 1990s. In contemporary times, users can exercise control over several aspects of their music listening experience, such as the duration, genre, and specific parameters of the tracks. This autonomy allows them to deviate from the traditional practice of adhering to the decisions made by disc jockeys (DJs) or the predetermined order of songs on an album. The streaming industry caters specifically to individual preferences rather than catering to popular or mainstream choices.

## Fragmented Futures: Musical Echo Chambers?

Nevertheless, there are growing concerns regarding the potential negative impact of streaming on the musical landscape since it may lead to a fragmented future characterized by a lack of diversity and limited opportunities for discovery. The available evidence indicates that personalized playlists tend to promote a concentrated listening experience centered around an individual's preexisting dominating taste, rather than fostering a more diverse and exploratory musical inquiry. The availability of unlimited on-demand libraries reduces the motivation to explore genres beyond one's personal preferences.

The fragmented listening patterns provide a potential risk of fostering "echo chambers" because users are exposed solely to music that reinforces their existing tastes. The instantaneous capability to skip songs restricts the capacity for individuals to cultivate tolerance towards listening to tracks that are above their comfort zone. The occurrence of serendipitous discoveries stemming from unknown tunes is

diminished when listeners possess complete control over their soundtracks. The collective popular songs and common reference points that once fostered cohesion throughout music culture are diminishing.

Furthermore, the prevalence of worldwide platforms such as Spotify poses a significant obstacle for local artists in Hong Kong to get recognition and visibility. The current landscape of music discovery is predominantly influenced by personalized algorithms that prioritize content that has already achieved viral status or is associated with artists who possess substantial promotional resources. This has an especially significant impact on independent musicians. Local bands and niche genres have significant challenges in gaining recognition and visibility in the middle of a continuous influx of globally renowned music that is specifically curated to cater to individual listener preferences.

The significance of radio spin or television appearances as means of gaining recognition has diminished in contemporary times. Fragmentation in the music industry also gives rise to the phenomenon of music overload, wherein the vast influx of tens of thousands of new songs across various genres on a daily basis poses a challenge in maintaining sustained attention towards any specific artist. In an increasingly fragmented media landscape, Hong Kong performers face heightened challenges in effectively engaging with their local audience due to the proliferation of personalized content consumption preferences.

In summary, the shift from restricted to boundless musical options has resulted in both emancipation and unforeseen challenges. The audience in Hong Kong has transitioned from being passive users of programming schedules to becoming empowered curators who customize each session. However, given the absence of the previously prevalent collective listening practices, the future scenario seems to be characterized by fragmentation and disparities. The re-establishment of equilibrium presents itself as a significant obstacle.

## Challenges for Artists and Industry in the Streaming Era

The music industry in Hong Kong, along with its associated professionals, is likewise experiencing significant disruption due to the transformative impact of streaming services on conventional revenue structures and promotional strategies. The decrease in high-profit physical sales has significantly altered the distribution of power and financial gains within the business. The remuneration received from streaming subscriptions each individual play is significantly smaller in comparison to the

revenue generated from CD or download sales. In contemporary times, artists who were formerly able to continue their careers primarily through record deals have experienced a shift in their reliance on live performances and supplementary sources of revenue, such as clothing sales.

Larger, well-established entities within the industry have strategically modified their operational frameworks to endure and thrive. Nevertheless, streaming platforms present unique challenges for independent and lesser-known musicians in terms of gaining exposure and receiving equitable compensation. Critics contend that algorithms exhibit a bias toward musicians that have already attained popularity or are supported by record labels with substantial promotional resources. Instances resembling payola have been observed, wherein allegations have surfaced regarding record labels engaging in the payment of funds to obtain fabricated streams or secure placements on playlists. This exacerbates the difficulties that local musicians encounter in their efforts to establish organic connections with their fan base.

The public discourse in Hong Kong has raised inquiries regarding the necessity of regulatory measures to address concerns about artist compensation, power dynamics within the business, and competition. There is a growing concern regarding the sustainability of different creative voices in the face of consolidation and the dominance of industry titans. The implementation of radio royalties guarantees that legacy artists are fairly remunerated for their airplay. However, there is currently no comparable solution available in the domain of user-centered streaming.

In general, the disruptive nature of streaming platforms has the potential to empower consumers, but it also introduces much uncertainty regarding the ability of local artists to flourish and avoid precarious circumstances. Both the industry and the government are crucial in maintaining a dynamic and fair music ecosystem in Hong Kong, particularly in the face of significant technological advancements.

## Mitigating Risks in A Fragmented Musical Landscape

Lessons from Hong Kong's past provide insight into sustaining diversity and discovery going forward, even while fragmentation raises worries. The phenomenon of collectivism was already ingrained across society through the practice of shared listening habits and cultural touchpoints. While the phenomenon of personalized choice is expected to endure, it is crucial to strike a balance by incorporating external exposure to prevent the formation of closed echo

chambers.

Public radio maintains its relevance by offering opportunities for musical exploration that go beyond the limitations of algorithmic recommendations. Community events and in-person concerts serve as a means of reconnecting individuals with local talent and fostering social connections among attendees. The independent music scene in Hong Kong provides a remedy for fragmentation by facilitating collaborative musical experiences and introducing individuals to novel auditory sensations. Education plays a pivotal role in fostering an appreciation for a wide range of musical genres and local performers that extend beyond the popular cantopop or global successes typically encountered in mainstream culture. The integration of arts education inside schools and colleges facilitates the development of open-minded individuals who possess cultural literacy. In addition, policymakers engage in the evaluation of reforms in many aspects such as artist royalty payments, competition among platforms, consolidation within the business, and the promotion of media diversity. The implementation of a comprehensive policy roadmap is crucial to ensure that consumers, creators, and the wider public can derive maximum benefits from the ongoing technological revolution. In recent times, emerging music platforms have effectively used technology to facilitate social discovery, thereby offering viable alternatives to the conventional approach of algorithmic personalization. Companies such as Juked aim to restore the elements of chance discovery and communal engagement that were formerly fundamental to the musical landscape of Hong Kong. The integration of hybrid online and offline listening experiences has the potential to support a sustainable and well-rounded approach to music discovery in the future.

## Conclusion

The transition of Hong Kong's music consumption from a constrained and passive listening encounter to a boundless yet fragmented on-demand environment presents significant insights for music enthusiasts, artists, and the industry on a global scale. The implementation of personalized control has provided consumers with increased empowerment. However, it is important to address the potential hazards associated with this approach, such as the potential negative impact on diversity, local talent, and communal culture. Therefore, it is necessary to develop strategies to mitigate these risks. The continuous struggle of maintaining the well-being of the musical environment in the face of persistent technical advancements and globalization persists. The appeal of the previous epoch of music exploration, characterized by radio DJs,

mixtapes, and record stores, is ultimately irreplaceable. The audience had a positive reception towards the incorporation of randomization and unpredictability in the sequencing of songs. The constrained alternatives necessitated the assimilation of genres outside of one's customary preferences, thereby imparting comprehensive musical instruction. Entering a record shop provided the opportunity for hands-on exploration of vinyl records stored in crates, to discover a rare or lesser-known B-side track. Mixtapes and radio dedication songs have been utilized as a means of expressing affection and camaraderie through the medium of music.

The shared atmosphere, however, characterized by its inflexibility, facilitated a profound appreciation for artists as enthusiasts dedicated their time to acquiring the limited number of CDs they could buy. Audiences were cognizant of the scheduled appearances of their preferred musicians on television or radio, prompting them to congregate collectively to partake in the shared experience. The experience of eagerly awaiting the commencement of a song or the airing of a video was accompanied by a sense of excitement that is sometimes absent in contemporary society's culture of immediate satisfaction. The exercise of patience was considered virtuous during the era when acquiring music involved actively searching for it, as opposed to the current practice of passively streaming it.

In addition to passive listening, the era before music streaming fostered dynamic interactive music cultures, encompassing activities such as garage bands and ballroom dance. Nightly, live venues were filled as local artists engaged in direct interaction with their fan base. Amateur musicians were able to increase their visibility through street performances, participation in competitions, and the organic spread of positive word-of-mouth. DJ collectives and underground music zines played a pivotal role in promoting and advocating for emerging genres. The exhibitions offered unique opportunities to engage in formal attire, encounter like-minded individuals, and immerse oneself in the works of artists who extend beyond the realm of mainstream popularity.

Music was not simply a subjective exchange, but rather a dynamic cultural force that nurtured individual and collective identities. The individuals who engaged with the music were not only isolated curators with an unlimited array of specialized options but rather participants in a collective ecosystem that transcended the individual songs or artists comprising it. The rekindling of this sentiment toward the appreciation of music highlights the reason why the era before streaming services

evokes a sense of nostalgia in contemporary times. The serendipitous experience of discovering unfamiliar music when browsing physical vinyl collections or the intimate act of requesting songs during late-night radio broadcasts cannot be replicated by algorithms alone. In the context of a more fragmented future, it becomes imperative to strike a delicate equilibrium between the advantages of digital ease and the importance of fostering in-person community interactions.



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# Humanizing Workplace Transformation in a Technology-driven Market Environment

By Alma Rita R. Jimenez

The pandemic is the fastest accelerator of technology. We had to quickly embrace the change or risk not being able to get our needs during the lockdown. Digital platforms in a flash made everything and everyone reachable, rendering borders and distance superfluous.

To continue functioning, companies had to make the homes of their employees their remote offices during the lockdowns. Now, workplaces are fusions of physical and digital – and that will most likely become a way of life. The more obvious advantages for organizations are the opportunities to have more cost-effective operations – less overhead, wider market reach and improved efficiency and productivity as repetitive tasks become automated. All these help the bottom line.

But the digital space expanded the horizon of the workforce too. When every physical space becomes just a location point where digital transmissions are coming from, then the individuals become the center of everything. This opened opportunities and choices for people - where to go, who to join, what to get - even how they want to define their roles in the workplaces. Workforce mobility is a challenge for companies because in the end, having the right people is mission critical. Technology is a tool that needs human intelligence, creativity, and innovative spirit to animate it and put it to effective use.

So, talent today is a business capital, and it is getting scarce. That means we compete to acquire people who are essential to our business growth. What attributes will make it attractive for them to join and stay? Humans need humanized workplaces, and that becomes more important in a tech-driven environment. There is a lot to change in our organizations and the way we do business, but three changes are essential to humanize the workplace:

- **MINDSET:** Accept that you cannot have your cake and eat it too. You cannot use a work-from-home arrangement for instance, yet still measure attendance via traditional time-based metrics. We are so compulsive about maximizing eight hours that we even encroach beyond that. Flexible work

arrangements should accommodate personal needs and help employees achieve better work-life integration. Respect the boundaries. As they say, structure follows strategy. We cannot cherry pick the changes we want to adapt and expect them to work using outdated systems and policies.

- **PROCESS:** It is time to reconfigure processes so that systems and procedures are aligned to the technology changes taking place. The future of doing business is striking a balance between the human side and technology. Be clear about expectations, deliverables, and outcomes rather than time. Deploy the tech but leverage this equally with the distinct qualities and skills that humans bring to the table - critical thinking, problem-solving, empathy, and creativity. That fusion will foster better customer interaction, drive innovation, and find unique solutions to complex problems.

- **SKILLSET:** We must invest in the development of our workforce, equipping them with skills or retooling them to be adaptive to the transformations. This is an area that is oftentimes overlooked – we seem to expect that when we throw people in the water, they will learn how to swim. What is wrong with teaching them first so that there is less risk, they can handle themselves better and we shorten the learning curve?

In this technology-driven, transformed workplaces, both the employers and employees are learning together. No one has the monopoly of knowledge. Collaboration is crucial and hence, it is important to maintain strong human connections.

While technology facilitates communication, it is the human touch that fosters trust, empathy, and a sense of belonging. We must encourage regular and meaningful interactions, both in-person and virtually, so that no one feels isolated or disconnected. Building a strong sense of community within our organizations will enable us to weather the challenges of a technology-driven market together, emerging stronger and more resilient.

Today's environment is in constant motion

and where possible, leaders must always be ahead of the changes so that transitions are better managed. Staying static is not an option because eventually, the change will catch up. When it does, the options may already be limited or worse, the opportunity to act is no longer there.

Companies and their staff should work hand in hand to successfully navigate the transformations. The pandemic is an experience like no other - no one is a pioneer, and we are all at the starting line. The contribution of everyone counts.

I mentioned in a previous article I wrote that "Today's imperative is to morph the organizational DNA and emerge completely different. The discipline, foresight, and innovative spirit to transform mindsets and processes will give birth to stronger, agile organizations that can create and shape their markets, unhampered by geographies and technologies."

**That is how we can thrive in this tech-world.**

*(This article summarizes the author's presentation during the 44th National Conference of the Employers' Confederation of the Philippines (ECOP) on June 28, 2023. The author is Chair of the MAP CEO Conference Committee, Vice Chair of the MAP Tourism Committee, President and CEO of Health Solutions Corporation, and former Undersecretary of the Department of Tourism. Feedback at <map@map.org.ph> and <alma.almadrj@gmail.com>.)*



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# Business Opportunities in ASEAN

By Atty. Benedicta “Dick” Du-Baladad

The Association of Southeast Asian Nations (ASEAN) has emerged as a dynamic region that presents enticing business opportunities. ASEAN member-countries boast of a rapidly growing consumer market and a flourishing entrepreneurial ecosystem. With its strategic location and diverse economies, the ASEAN region has created a favorable environment for trade and investment through advanced technology, robust manufacturing centers, developing sectors, and attractive tourism destinations. Businesses have garnered opportunities to capitalize on ASEAN’s economic growth and tap into its immense potential.

Among the 10 member-countries of this region, the Ambassadors of Malaysia, Singapore, Thailand, Vietnam, and Indonesia were invited to a Panel Discussion during the General Membership Meeting of the Management Association of the Philippines (MAP) last July 12, 2023 in Taguig City to share the business opportunities in their respective countries that investors and companies in the Philippines may be inspired to tap into.

The countries’ representatives actively seek investments to foster sustainable growth, connectivity, and success for businesses in a clean and secure environment.

## MALAYSIA

With a population of over 32 million and a strong trading nation ranking in 2022, Malaysia offers a substantial consumer market having signed 16 free trade agreements and among the signatories of important regional agreements, such as the Regional Comprehensive Economic Partnership (RCEP) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). Malaysia boasts of competitive high-value manufacturing business opportunities while excelling in electric and luxury products, chemical products, palm oil-based agriculture products, and processed food exports.

Green technology and halal products are the main industries that Malaysia strongly

highlights. For the continuous expansion of Malaysia’s halal industry, companies were encouraged to invest in its halal food manufacturing and Islamic banking. With its pro-business policies and investment incentives, a favorable environment was created for these sectors to sustain long-term success. Despite current economic uncertainties, the country’s manufacturing sector continues to play a vital role in its economic transformation and its contribution to its export revenue and growth.

## SINGAPORE

Thriving industries through various Singaporean sectors made the country a global hub for businesses, attracting multinational companies and fast-growing start-ups. Singapore serves as a vital gateway to companies seeking multiple market strategies and commits on providing advanced manufacturing capabilities, innovation centers, open and free trade investments, and significant government support.

Singapore, as the Philippines’ top source of foreign direct investment (FDI) and largest trading partner in ASEAN, calls for a collaboration with the country to seize opportunities and enhance their relationship further. Notably, Singapore’s business-friendly environment allows for opening a business in just 15 minutes, showcasing its ease of doing business, efficiency, and attractiveness for entrepreneurs.

## THAILAND

Intra-ASEAN trade and investment for the Philippines were much promoted by Thailand, highlighting its investment-friendly environment, reduced trade barriers, tax incentives, and supportive services for high-tech industries and agriculture technology.

The existence of the Eastern Economic Corridor (EEC) serves as a one-stop service

to businesses seeking consultations on suitable business types and land options. This makes investments in Thailand not only beneficial for the country but also opens opportunities in the macro region covering Cambodia, Laos, Vietnam, and Myanmar.

Partnerships with local Thai companies can facilitate broader investments and access to the regional market. Additionally, exploring business-to-business opportunities with Thai organizations can unlock further prospects for partnerships and growth as engaging with Thailand can lead to valuable connections and avenues for cooperation.

## VIETNAM

Earning recognition from the United Nations Conference on Trade and Development (UNCTAD) signifies that Vietnam has been successful in developing and attracting foreign investments.

Vietnam is well-positioned at the center of Southeast Asia -- a dynamic region of the world where socio-political and macro-economic stability are well maintained; inviting enormous potential on the Vietnamese consumption market helping the country increase its global standing.

Along with its dynamic economic reform, innovation and digital transformation, and large-scale transport in urban infrastructure projects, Vietnam also boasts of its abundant workforce that continues to be developed and reformed through vocational training.

As a large export market in the Asia-Pacific, Vietnam readies itself for the next global investment wave providing advanced technology projects, strong reform, and various business opportunities.

## INDONESIA

The Nusantara National Capital Authority of Indonesia facilitates regulations on business permits and investment facilities offering special incentives, such as land rights with a duration of 80-95 years.



The investment process in Nusantara follows eight steps and there has been significant interest from potential investors, with over 200 LOIs received from various countries.

Indonesia currently has 20 Special Economic Zones (SEZs), including the Sanur SEZ and the Kura Kura Bali (KKB) SEZ. The KKB, located in Bali, offers an integrated economic environment with SEZ status, providing incentives for investors in the tourism and creative industries as it offers opportunities in various sectors in health, innovation, marina, and hospitality, among others.

Investing in KKB allows businesses to benefit from Bali's rich historical, cultural, and artistic traditions that will promote tourism in Indonesia. The SEZ status and alignment with Bali's economic roadmap make KKB an excellent vehicle for international direct investment to drive the country's economic development.

#### Conclusion

The ASEAN region continues to prominently advance business opportunities in various industries and sectors. The entry of the 4th Industrial Revolution has prompted the ASEAN member-countries to prepare their businesses and the economic environment by providing game-changing and innovative ideas that would stand the rapid developments in technology.

All the 5 countries – Indonesia, Malaysia, Singapore, Thailand, Vietnam – and the Philippines all called to improve intra-regional investment and trade. These not only bring economic benefit to their respective companies or their own local jurisdiction, but also foster better friendship and collaboration within the region leading to the earlier realization of its dream of becoming a powerful regional economic bloc, one that can help shape the development of world commerce.

**Our Philippine business sector is encouraged to heed this call.**

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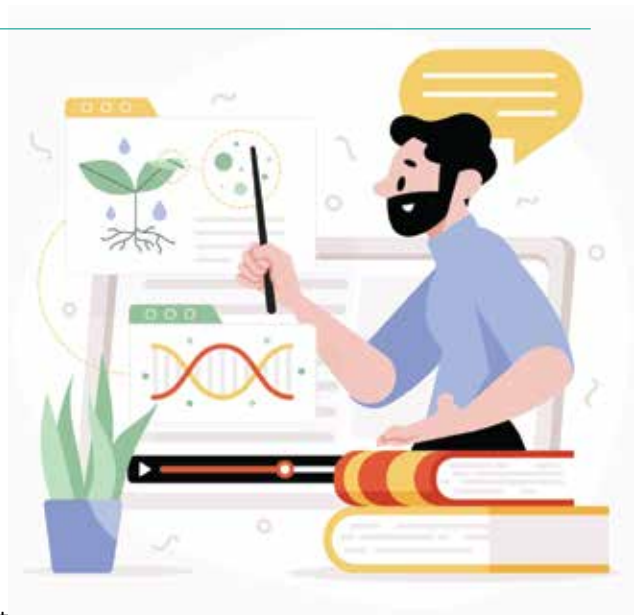
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# Unlearn to Learn

By Brian Tang, Corporate Training Consultant



During summer time my family and I visited an outlying island in Hong Kong. It was a beautiful place for sightseeing, bike riding and walking. We decided to rent a bike, a tricycle to be precise, so that we can explore farther in the island. However, to my surprise, I was unable to ride the tricycle. No matter how hard I tried to steer the bike, it always went to my left-hand side instead of going straight. At first, I thought there might be something wrong with the axle or wheels so I went back to the shop and replaced the tricycle. It turned out to be the same. Then I asked my wife to try it. She got into the same problem. I was perplexed, frustrated, and I gave up trying.

I went back to the shop and asked the shopkeeper what happened. The weather was hot enough, and so was my emotion. I am sure my tone of voice was not very friendly. The shopkeeper remained calm and answered me in monotone, as if he has responded to the same question hundreds of times. He told me to “let go” of controlling the tricycle, and only hold onto the handle to guide the direction. Tricycle is a balanced vehicle. It doesn’t need any more balancing. He kept repeating the keyword “let go”. I tried. It wasn’t easy. I had to keep telling myself to “let go” of balancing the bike. Slowly but surely, the tricycle started moving straight. Occasionally it still went to the side but as soon as I let go of balancing, it went straight.

Essentially, I had to unlearn the technique of riding a bike so that I can start learning how to ride a tricycle. The unlearning and relearning process took me about 15 minutes and then I started enjoying the beauty of the breeze and scenery. As I rode down the road, I began thinking whether there are other parts of our lives that require us to unlearn previous experience before we can learn new things. Certainly, there are.

## The never-ending change management

If I had to summarize the biggest lesson of the COVID pandemic in the last couple of years, I would say it is the ability to adapt to changes and stay resilient. The world has never been more VUCA, and there’s no sign of it slowing down. To survive, let alone to

thrive, individuals and organization able to swiftly respond to changes and adapt. The way we view change management must change from a one-off, project-based task to a mindset that:

- Change is inevitable (It will happen and it happens all the time, whether we like it or not.)
  - Change is possible (I accept the change. I can change, and I can help my team/organization to change.)
  - Change is beneficial (There’s always something to learn from the change.)
- Change management is a big discipline and enough literature has been written on the topic, from organizational change to individual change. In this article I will switch gear and specifically focus on something related to change management but not exactly change management: **Unlearn to Learn**.

Changes often require us to let go of existing ways of doing things and adopt new ways. Therefore, mastering the technique of unlearning and relearning can speed up the change curve, reduce time and effort, and increase change effectiveness.

<sup>1</sup> VUCA stands for Volatile, Uncertain, Complex, and Ambiguous. It was a term coined by US Army to describe the unstable world environment at the end of the Cold War.

## From Unlearn to Learn

The unlearning story I told at the beginning of the article, though a frustrating one, didn’t take me a lot of time to go from unlearning the old technique to learning a new one. However, more complicated changes may benefit from a structured process to unlearn and learn. I am going to offer a three steps process with a personal case study. Let me start with the background.

I am a full-time training consultant. Most of my work involves offering training workshops in a classroom. When the pandemic turned the world upside down a couple years back, I was stranded at home just as everyone else. It meant that all my

ultimately canceled). As I sat idle at home, I began attending different webinars and virtual workshops. Soon I realized this pandemic thing is going to last for a while so I decided to develop my skills in conducting virtual trainings.

I tested different virtual meeting and collaboration platforms and I started conducting many trial runs on different topics with friends and associates (for free). In a few weeks’ time I felt like I have known enough to be a competent virtual trainer and I can teach people how to be one. Hence, I designed and developed my own “Train the Virtual Trainer” program and rolled out to the public. The response was positive and I have successfully conducted a number of classes. That kept me busy during the pandemic and established myself a new role: “Virtual Trainer”.

In retrospect, I unlearned what I knew about training service in a classroom and learned how to do it in virtual space. The process can be broken down into three steps.

### 1. Adjust mindset

When it comes to learning a new skill, most people immediately jump to the new skillsets required. While skillsets are paramount, I believe a proper mindset should precede the skillset. There are two mindsets involved in here.

#### 1.1 Let go

Unlearning means letting go of your existing awareness of the skill, knowledge, status, ego, etc. (I call this “baggage”) that is associated with the issue on hand. Without letting go of the baggage, we will be unable to truly unlearn and relearn. For instance, as I learned to be a competent virtual trainer, I realized that I was not learning a new skill based on my existing knowledge of a trainer – I was actually learning something completely new from the ground up. It takes a completely different skillset to be a virtual trainer. Letting go of my previous knowledge allows me to question the status quo and creates room in my mind to absorb new things like a rookie.

### 1.2 Growth Mindset

Once we have let go of the baggage, we can start to learn new things. However, learning new things aren't always smooth and easy. Setback is inevitable. Hence we need to harness a Growth Mindset, a term coined by psychologist Dr. Carol Dweck. People with a Growth Mindset believe that intelligence and skills are not inborn but cultivated. Given the right resources and strategies, any one can develop any skill. To unlearn an old way of doing or thinking things, one must believe in Growth Mindset. No one is too old or too late to learn. Believing in the opposite (a Fixed Mindset, which states that either we have it or we don't) will only paralyze us from learning new things.

### 2. Learn from others

Regardless of your professions, there are always people who are ahead of us in the learning curve. During the unlearning and relearning process, it pays enormous dividends to learn from those who are successful. There are two ways to do that.

#### 2.1 Find a role model

Find someone in your profession who is doing well in what you want to do. What did she do? How did she do it? I attended many virtual workshops during the pandemic. In each case, I observed how the trainer handled the virtual session. I would document areas that she did well and not-so-well in detail. After I have attended a number of sessions, I started to identify patterns of what makes a virtual trainer competent. I even reached out to one trainer whom I believed was the best of the best. I was being open and straight – I like your virtual workshop and I want to learn your skills. Would you give me 15 minutes for a video call and share your expertise? When you are being genuine, most people would respond favorably. When you learn from a role model, you save yourself time and resources from reinventing the wheel.

#### 2.2 If a big shot were in my seat, what would he/she do?

Finding a role model is about learning from a real person. The next tactic is to learn from a real person in a hypothetical situation. Imagine if someone you know, who is ultra-successful in some part of his/her life or career (in this case we call this person the "big shot") were in your shoes, what would he/she do? In my case, I have a good friend who is in an executive position in an organization. He is very competent as an individual contributor as well as a leader. I always look up to him. When I was learning to be a virtual trainer, I asked myself, if my friend (the big shot) were in my seat, what would he do? Based on my understanding of my friend, I know he would create something unique and original and brand

himself as the expert. I "took his advice" and created my own "Train the Virtual Trainer" program.

What you are doing is basically force yourself to look at the issue from a third person's eyes. We are always good at solving other people's problem but not so good at solving our own. This mental exercise makes us adopt someone's perspective (someone who is super successful) in order to gain additional insight or reveal blind spot. Note that this big shot doesn't have to be in your profession. If you don't know any "big shot" in person, you can try some well-known big shots. For example, ask yourself, "If Steve Jobs were in my shoes, what would he do?"

### 3. Journal the learning process

The last step in the unlearning and learning process is to document the journey. After each unlearning and learning exercise, reflect and document your thoughts. Ask yourself:

- What did I do?
- What went well and what didn't?
- What is the lesson learned?

Unless what you want to learn is a simple thing, it usually takes some trial and error to truly unlearn old habits and learn a new skill. Journaling allows you to crystalize your thoughts and learn from your experience. It strengthens your Growth Mindset as you reinforce the belief that everything is learnable as long as we try properly. Don't over rely on our memory. What was not written is basically lost.

After I conducted each and every virtual workshop, I would document my lesson learned. I also asked participants for feedback. During the "Train the Virtual Trainer" program, I would share my lesson learned with the participants.

In sum, unlearning and relearning is a much-needed skill in the fast-changing world today. It is by no means easy, as it involves a shift in mindset and development of new skillset. By following the 3 steps process I outlined in this article, you can unlearn and relearn with ease. Riding a tricycle should not be as difficult and frustrating as my experience showed.

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Asian Association of Management Organisations

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AAMO is a partnership of National Management Organizations (NMO) whose purpose is to share and actively leverage resources to enhance the achievement of their respective missions. AAMO is an independent, nonpolitical and not-for-profit Association of NMOs, which promotes, facilitates and supports the development of professional management in the Asia Pacific Region.

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