

LIVING IN CRISIS

MASKED UP AND MOVING FORWARD IN SEA

Tracking the evolving opinions and behavior around COVID-19 in Southeast Asia

Wave 2 : Survey Period 18 – 22 Sep 2020

15 October 2020

GAME CHANGERS



REPORT CONTENTS



Evolving State of Pandemic in SEA



Impact on income and outlook



Impact on various sectors and product categories

- Survey Period:
 - Wave 1 : 19-25 May 2020
 - Wave 2 : 18-22 Sep 2020
- Coverage : Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam
- Sample per wave : N=500 nationally representative sample in a country aged 18 and above (Quotas on age, gender and ethnicity were employed by markets to ensure that the sample's composition reflects the overall population distribution)
- Data Collection : Using online methodology

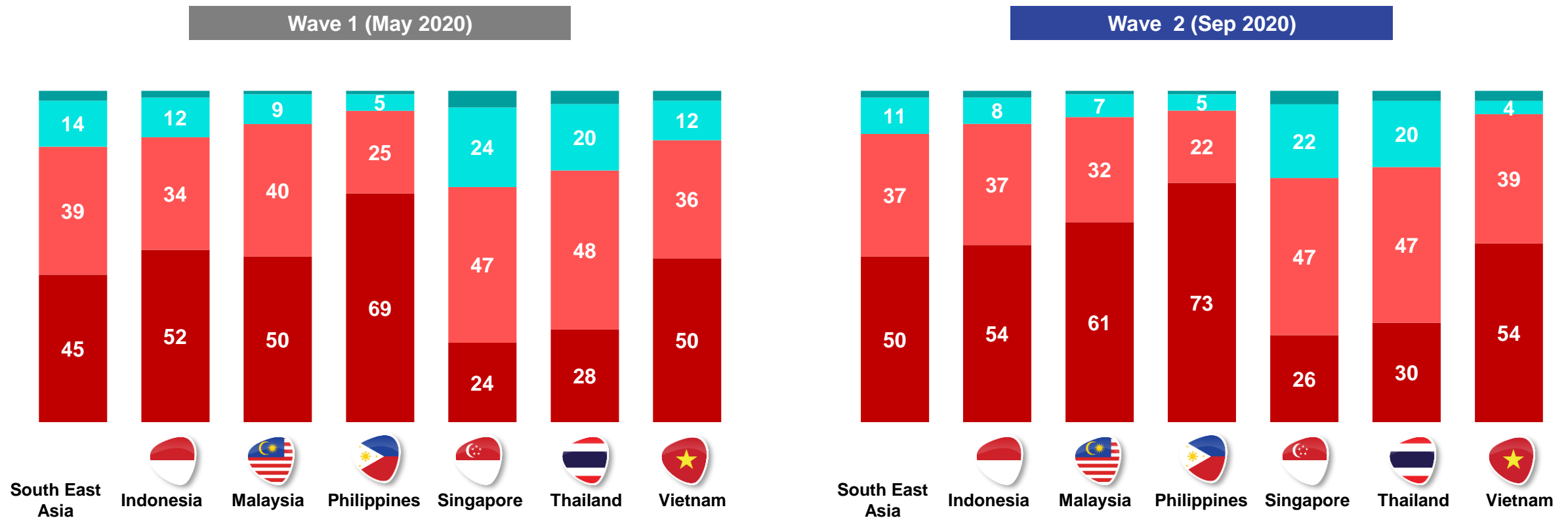


Part 1

The Evolving State of the Pandemic in SEA

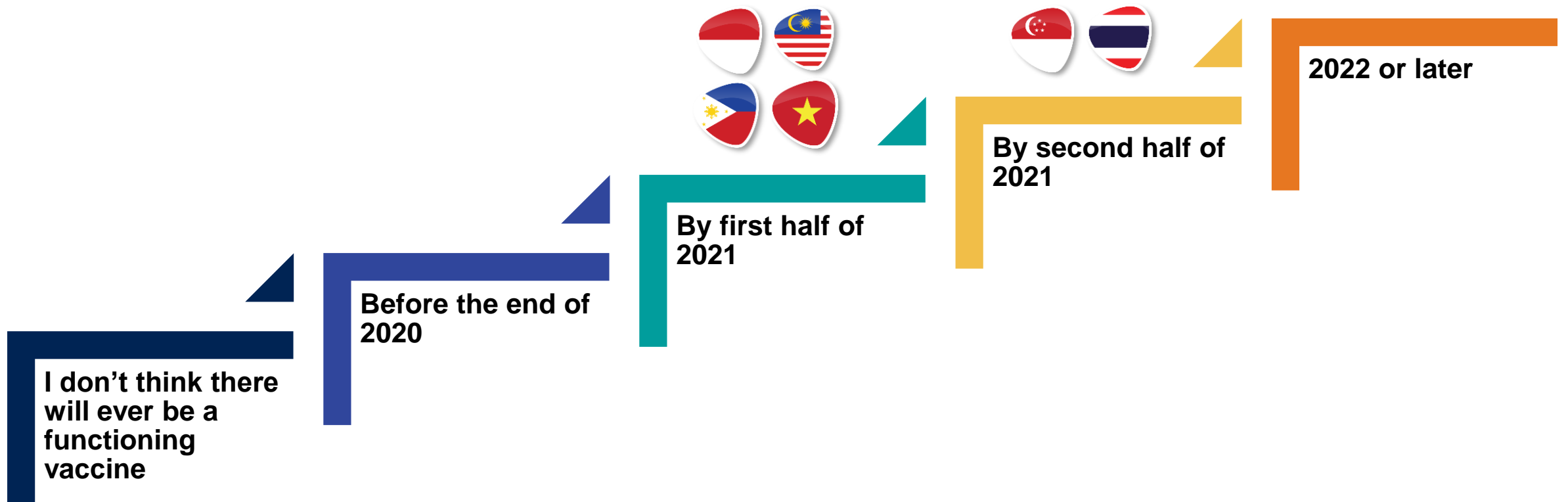
PEOPLE ARE STILL CONCERNED ABOUT CONTRACTING COVID-19. NO CHANGE SEEN FROM PREVIOUS WAVE ACROSS MARKETS.

Are you worried about contracting Covid-19?



MAJORITY THINK A VACCINE WOULD ARRIVE IN 2021. SINGAPOREANS AND THAI PEOPLE EXPECT VACCINE ARRIVAL EVEN LATER.

When do you believe a vaccine against Covid-19 will be available to everyone in your country?

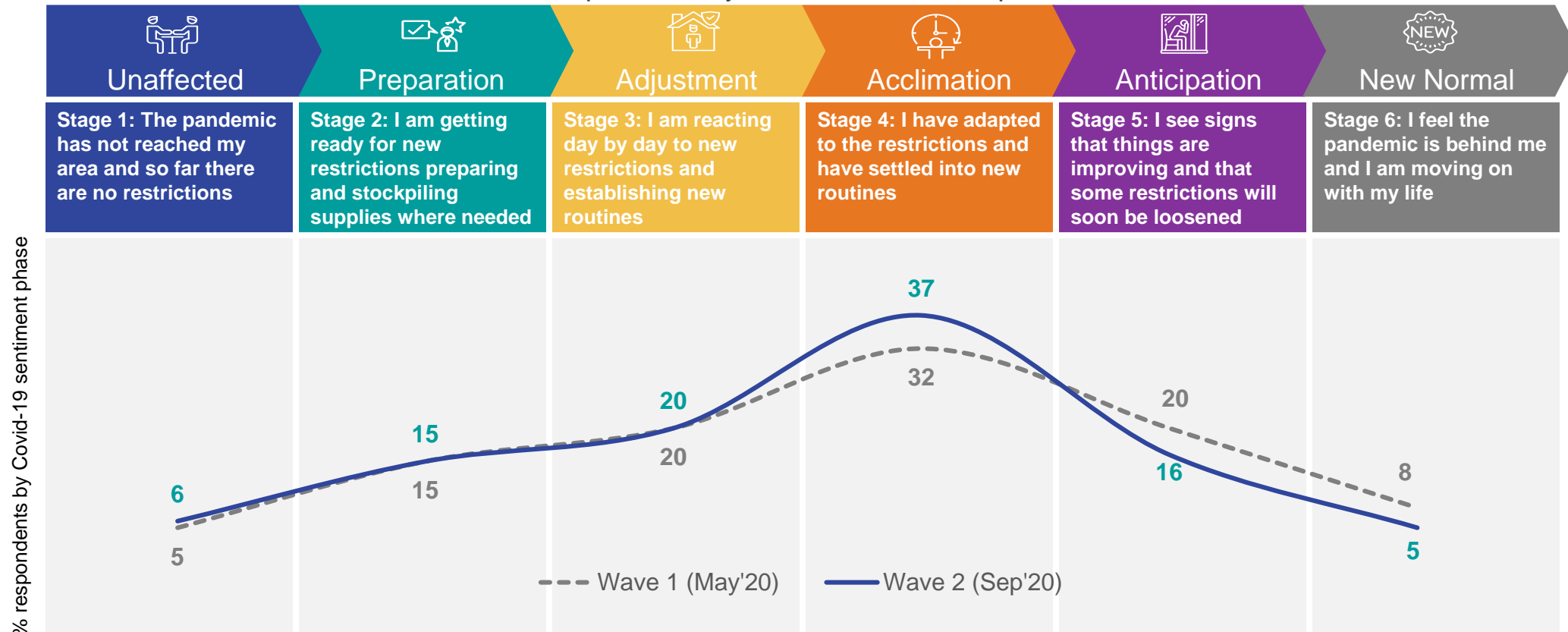


MOST HAVE ADAPTED TO NEW HABITS AND ROUTINES, HOWEVER NO IMPROVEMENT SIGNS SEEN SINCE MAY.

Considering the current state of Covid-19 and the counter measures implemented in your country, how do you feel about the situation as it is now?

South East Asia (All countries)

% respondents by Covid-19 sentiment phase



MOST HAVE ADAPTED AND SETTLED INTO NEW ROUTINES

Considering the current state of Covid-19 and the counter measures implemented in your country, how do you feel about the situation as it is now?

Wave 2 (Sep 2020)

Colour Flags (W2)
indicate perceived stage by the plurality in each country

Stage 1: The pandemic has not reached my area and so far there are no restrictions

Stage 2: I am getting ready for new restrictions preparing and stockpiling supplies where needed

Stage 3: I am reacting day by day to new restrictions and establishing new routines

Stage 4: I have adapted to the restrictions and have settled into new routines

Stage 5: I see signs that things are improving and that some restrictions will soon be loosened

Stage 6: I feel the pandemic is behind me and I am moving on with my life

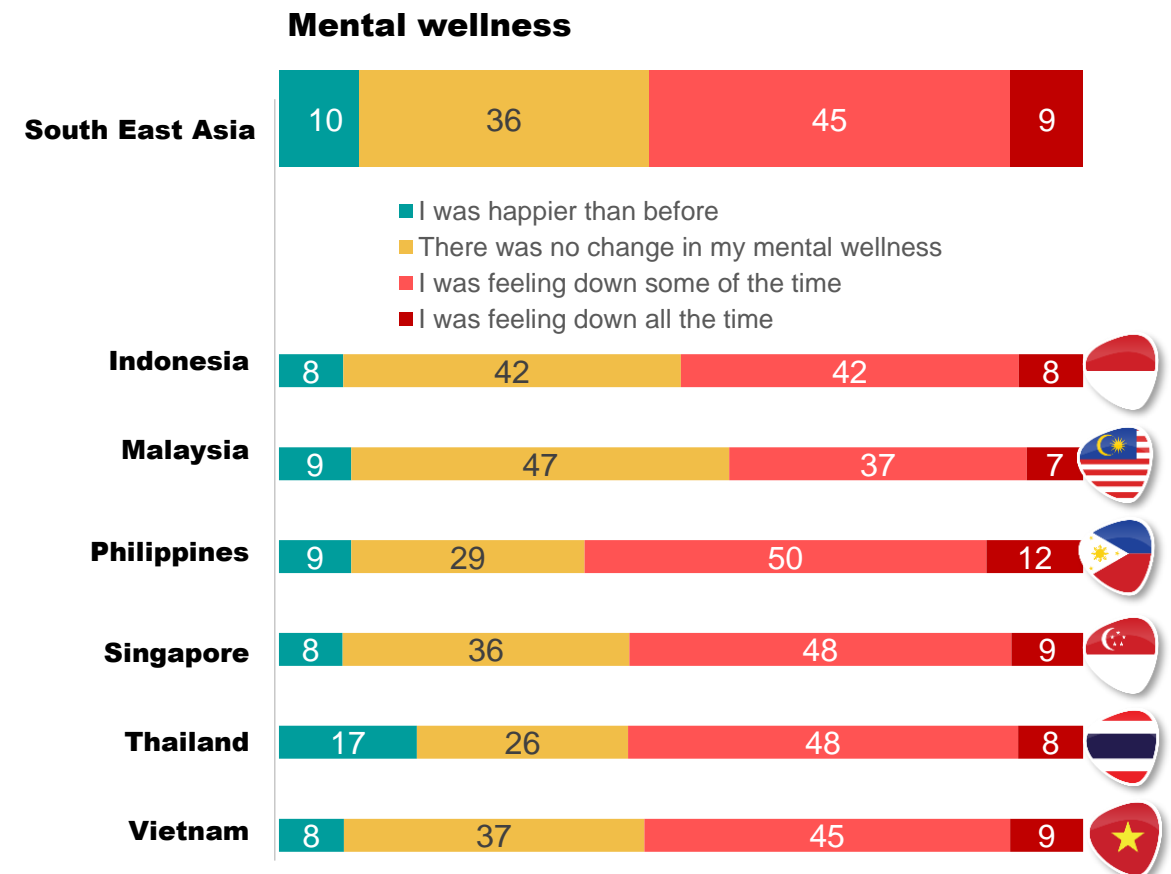
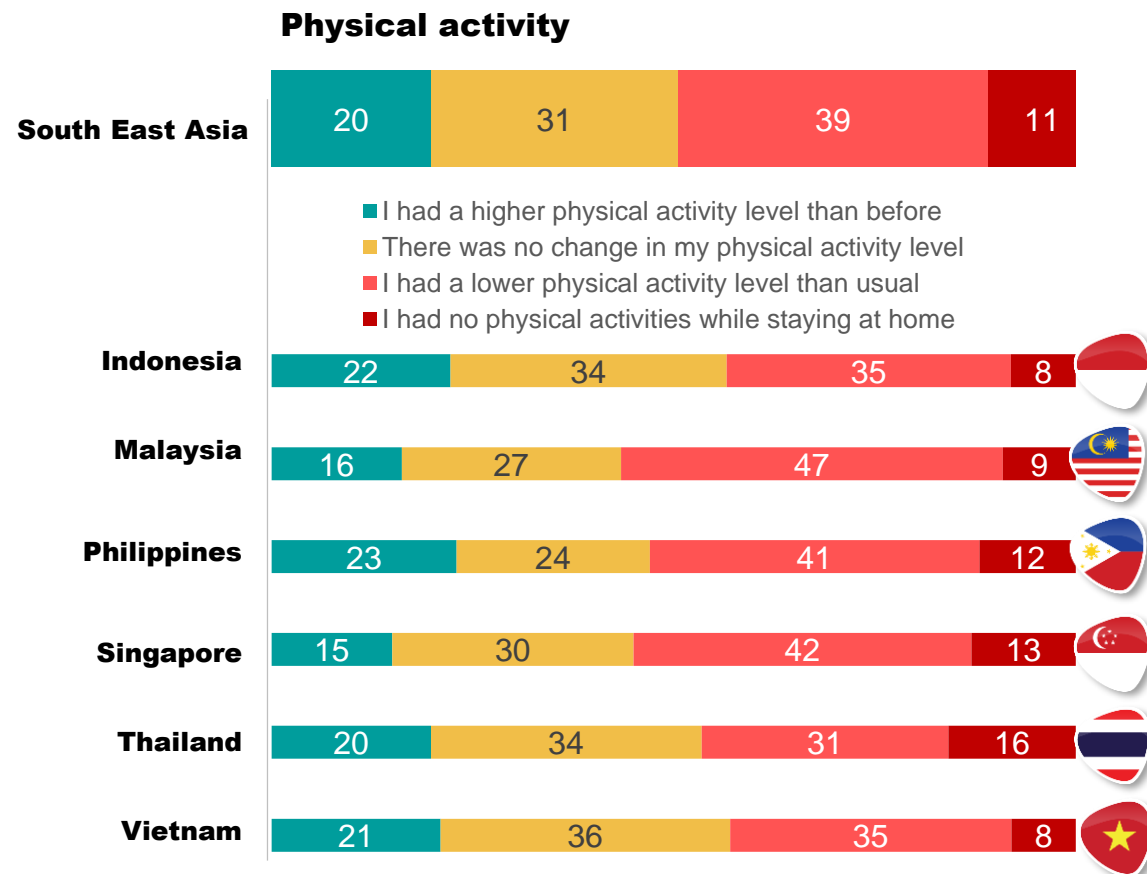


Wave 1 (May 2020)

Gray Flags (W1)
indicate perceived stage by the plurality in each country

STAYING AT HOME HAS IMPACTED BOTH PHYSICAL AND MENTAL WELL BEING FOR MOST

Since the beginning of the Covid crisis, how do you feel staying more at home have impacted your physical activity level and mental wellness?





Part 1 : The evolving state of the pandemic in SEA

No major improvement seen since last wave. Majority are still concerned about contracting Covid-19 and they don't expect the vaccine to arrive until next year.

Majority have adapted to new habits and routines; however, they don't see signs of things improving since last wave.

Staying at home has also impacted both physical and mental well-being for most.



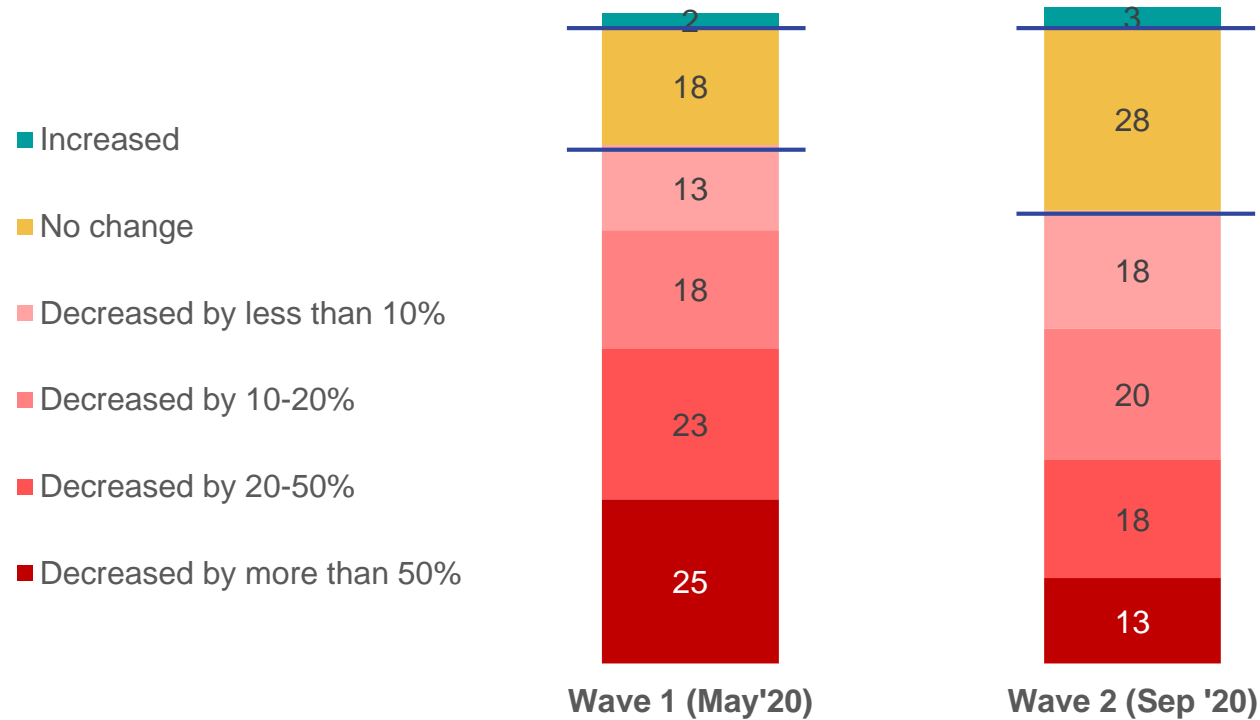
Part 2

The impact of the outbreak on incomes and outlook

IMPROVEMENT SEEN IN INCOME AS CONSUMERS GET USED TO CONDUCTING BUSINESS UNDER THIS PANDEMIC

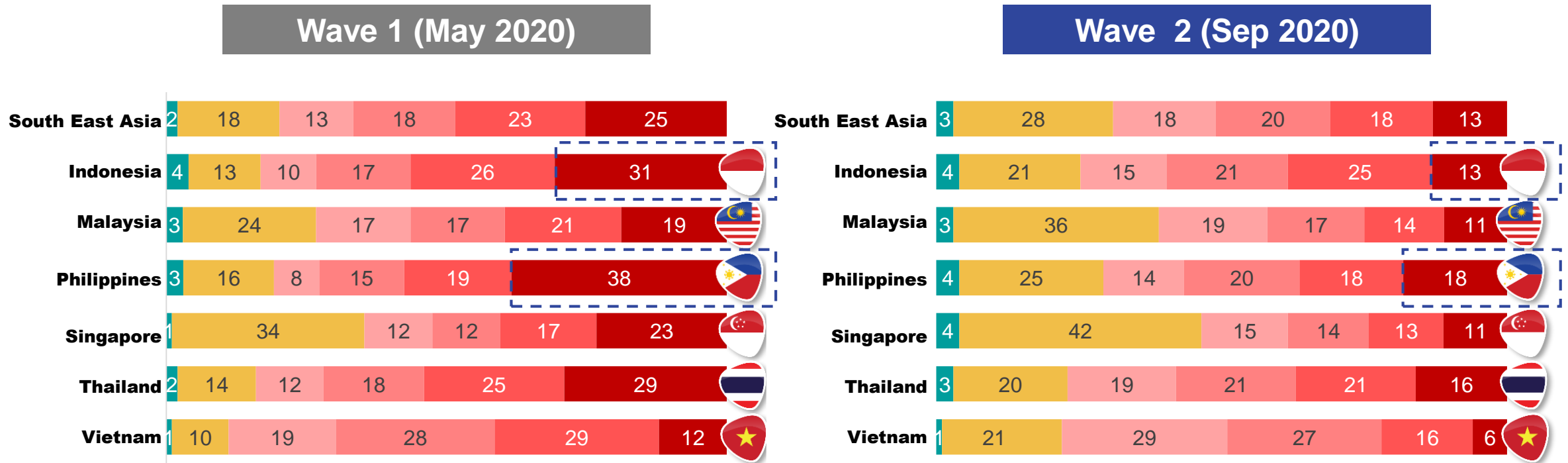
What is your current household income compared to before the Covid-19 pandemic?

South East Asia (All countries)



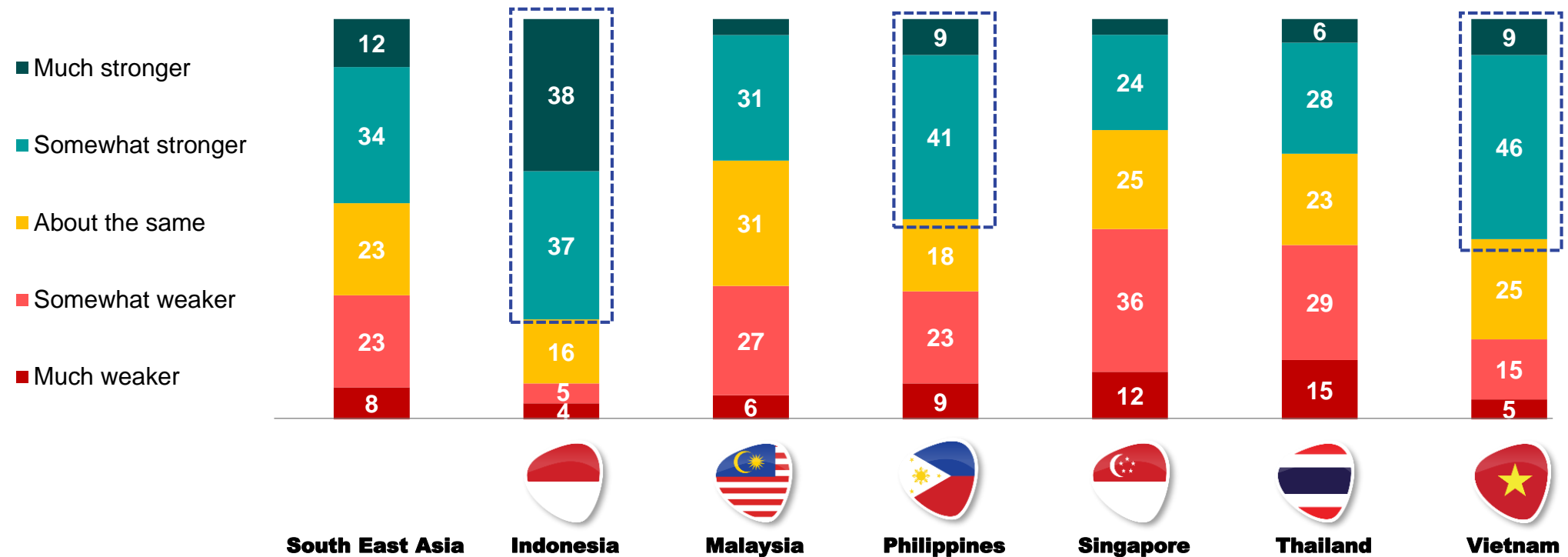
THE IMPACT ON INCOME IS LESS SEVERE THAN BEFORE ACROSS ALL MARKETS. INDONESIA & PHILIPPINES SHOW MOST IMPROVEMENT

What is your current household income compared to before the Covid-19 pandemic?



IN LINE WITH INCOME RECOVERY, INDONESIANS, VIETNAMESE & FILIPINOS ARE MOST OPTIMISTIC.

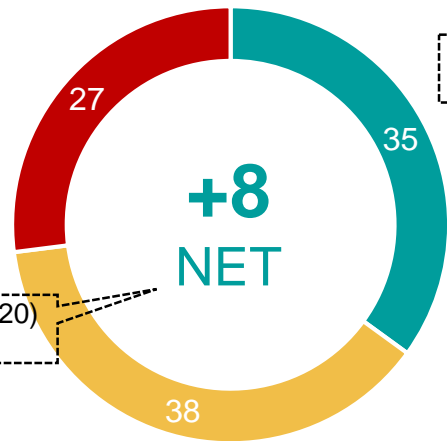
Looking ahead six months from now, do you expect the economy in your local area to be ...



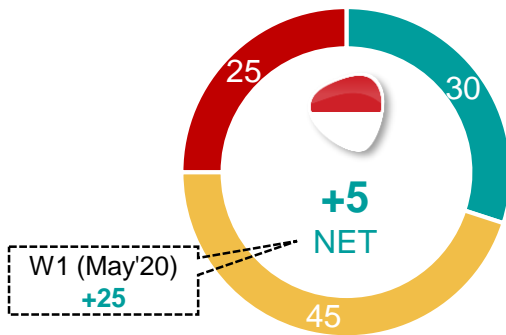
VIETNAMESE ALSO MOST OPTIMISTIC ABOUT SWIFT INCOME RECOVERY. LESS PESSIMISM SEEN AMONG SINGAPOREANS AND MALAYSIANS THAN BEFORE.

How do you see your household income changing in the next 6 months?

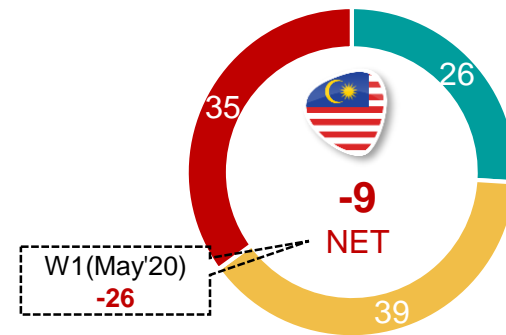
- Will improve
- Remain the same
- Will get worse



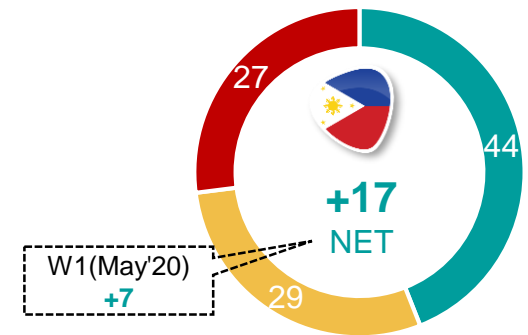
South East Asia



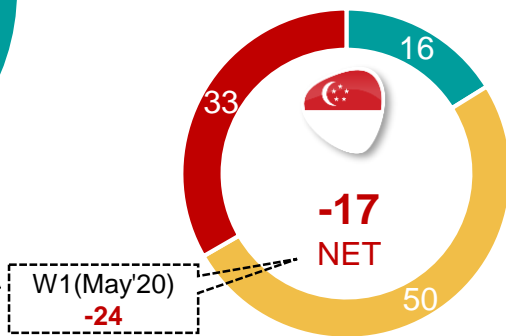
Indonesia



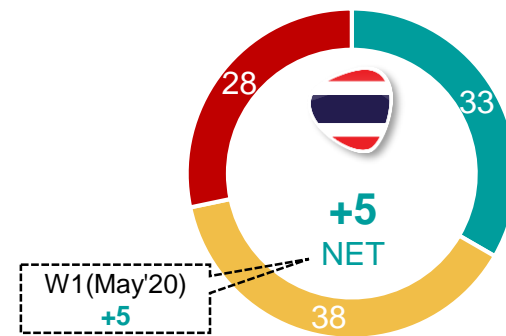
Malaysia



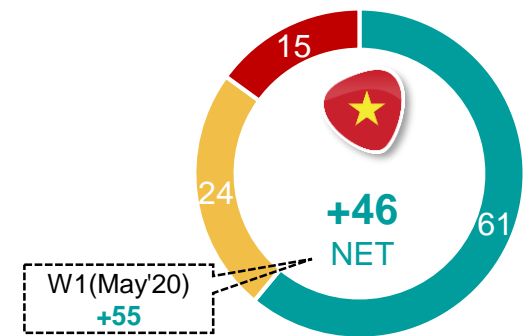
Philippines



Singapore



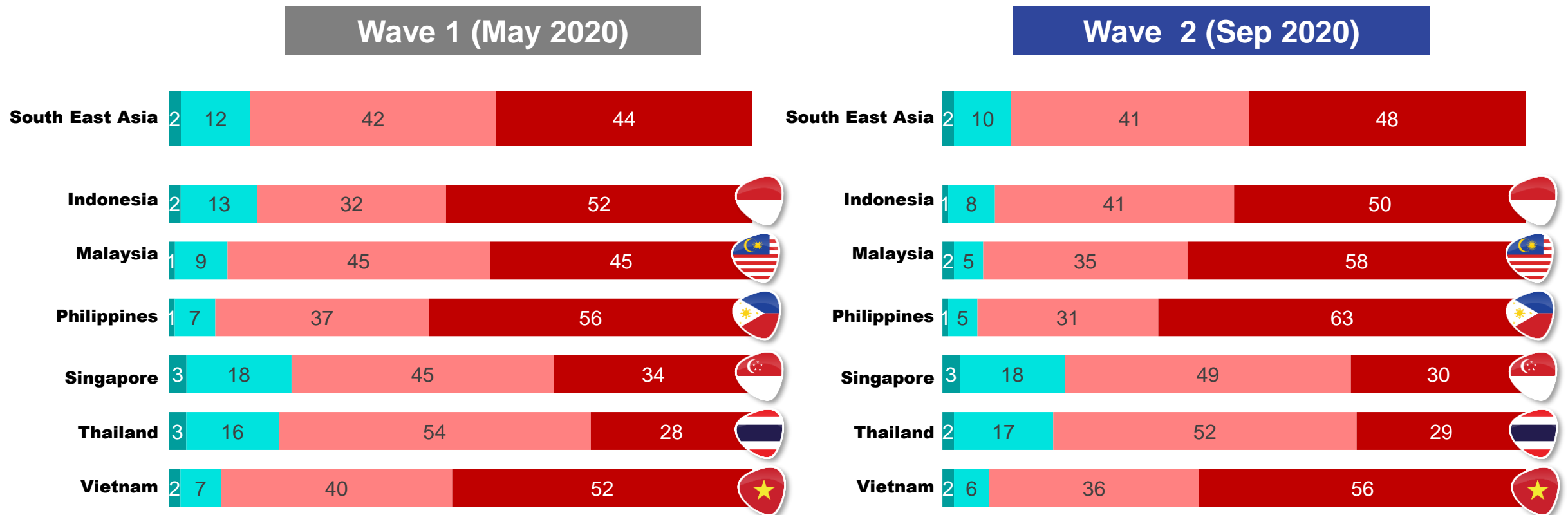
Thailand



Vietnam

MOST STILL WORRIED THAT NEW RESTRICTIONS BE IMPOSED AGAIN. LEVEL UNCHANGED SINCE LAST WAVE.

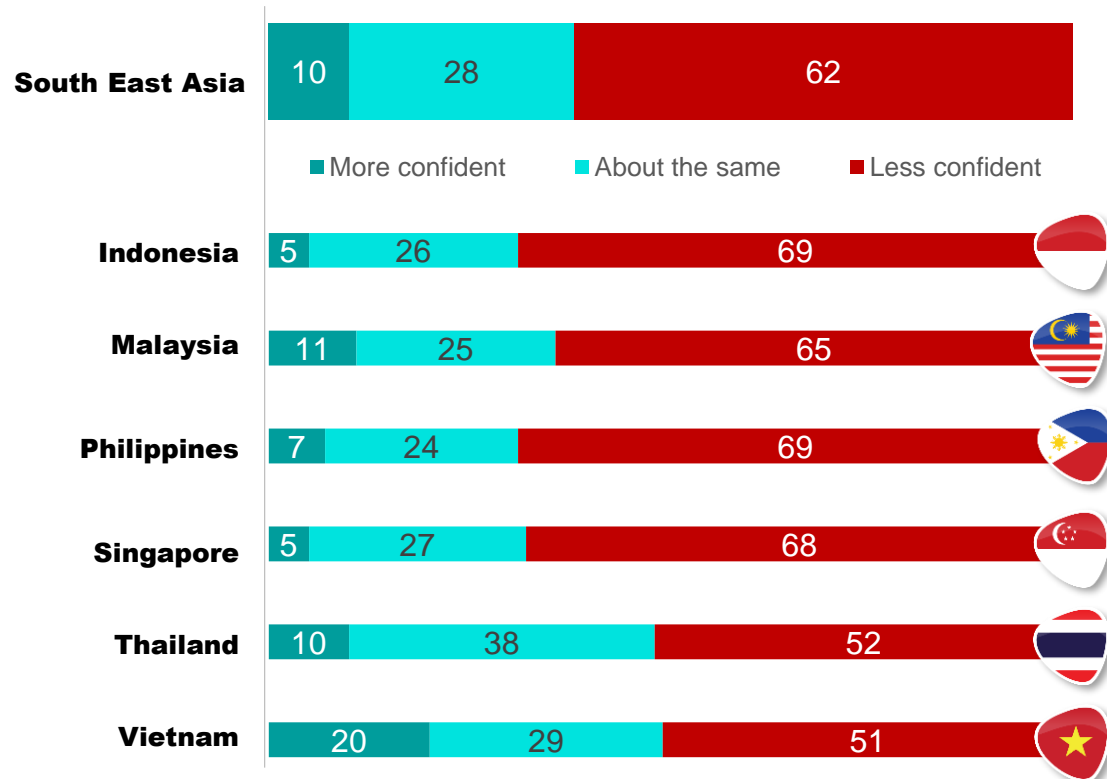
If there is a resurgence of Covid-19 cases in the future, how worried are you that the government will reimpose containment measures and affect your income?



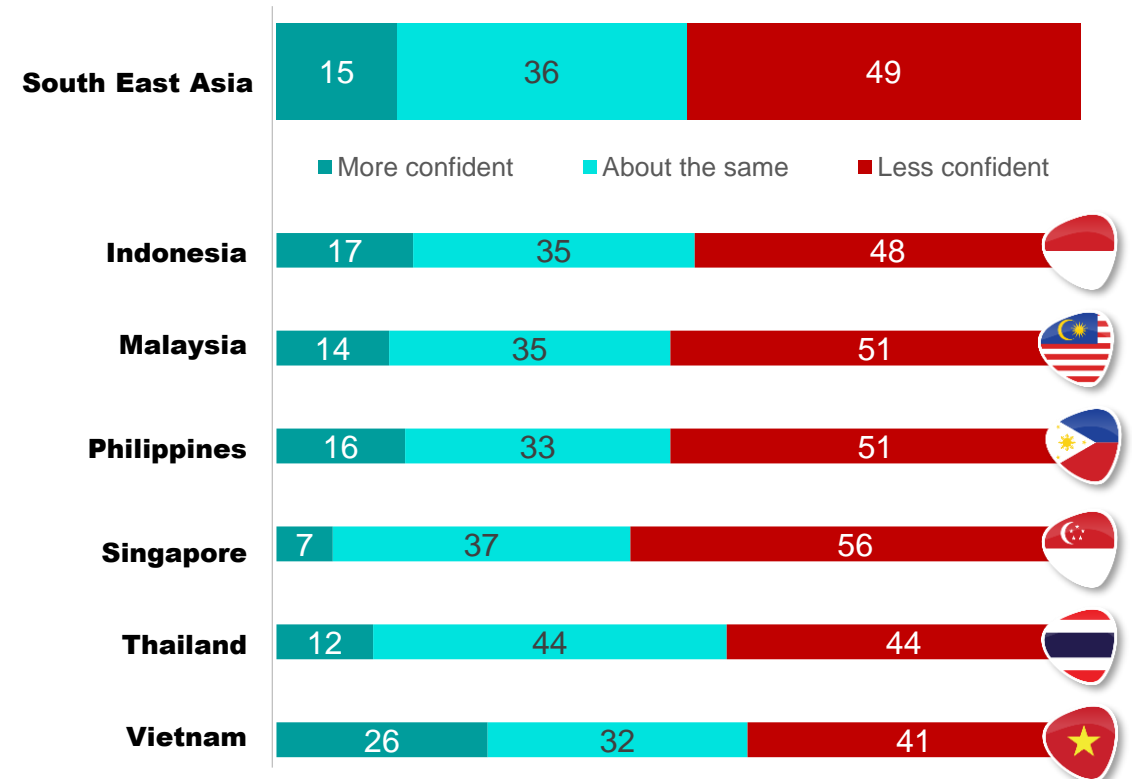
AND ARE NOT CONFIDENT OF MAKING ANY BIG-TICKET PURCHASE OR INVESTMENT

Compared to about 3 months ago, after Covid had become widespread, are you NOW more or less comfortable with ...

Making a major purchase, like a home or car

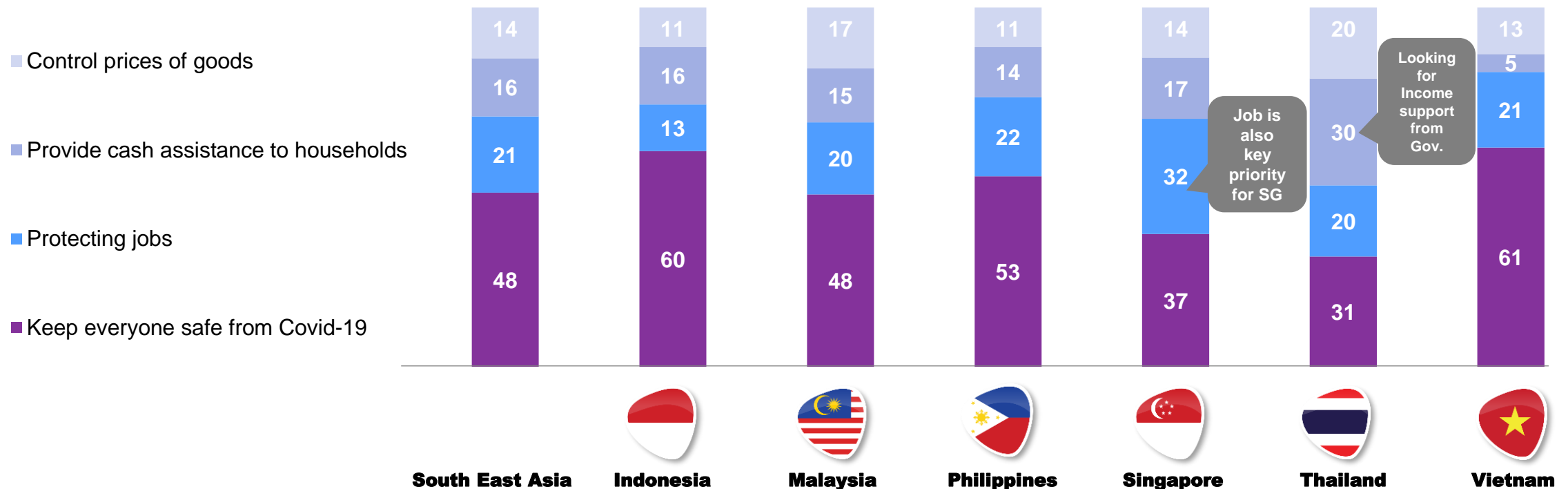


Job security for yourself, your family and other people you know personally



PROTECTION FROM COVID-19 STILL IS TOP PRIORITY EXPECTED FROM GOVERNMENT ACROSS MARKETS.

In the next 6 months, what do you think is the most important issue the government should focus on?





Part 2 : Impact on income and outlook

Income situation, though still a concern, has improved in the region.

Income outlook in Vietnam remains positive. Indonesia and Philippines, however, show most improvement vs. last wave.

But most are still living with caution, should new restrictions be imposed again and are currently not confident to make any big-ticket purchases such as houses or cars.










Part 3

The impact on various sectors and product categories

WHILE MOST ARE COMFORTABLE TO VISIT FAMILY OR RESTAURANTS, LONG RECOVERY CAN BE EXPECTED FOR TRAVEL (ESPECIALLY INTERNATIONAL) AND SOCIAL EVENTS

When would be the earliest time you would be comfortable with doing each of the below activities?

South East Asia (All countries)

		September-October	November-December	January – February 2021	March 2021 or later
Go to a restaurant		41%	22%	19%	18%
Visit friends or family in their homes		47%	23%	18%	13%
Use public transportation		46%	19%	16%	19%
Join a cultural event/gathering		21%	19%	24%	35%
Go to a gym/sports facility		30%	17%	19%	34%
Travel domestically		24%	19%	20%	36%
Travel to another country		9%	6%	13%	72%

MALAYSIANS AND FILIPINOS THINK IT WILL TAKE A WHILE LONGER BEFORE LIFE WILL RETURN TO NORMAL

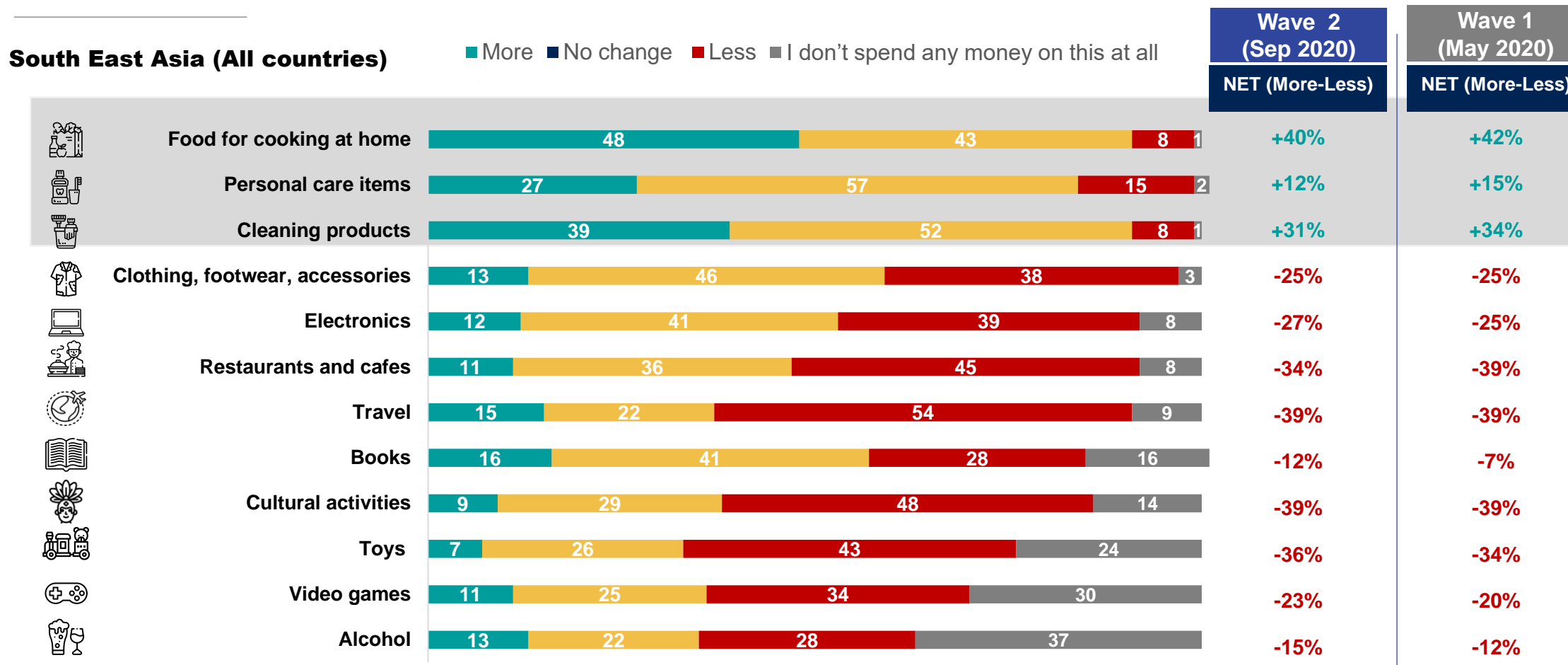
When would be the earliest time you would be comfortable with doing each of the below activities?

Flag indicate comfort level by plurality of people in each country

		September-October	November-December	January – February 2021	March 2021 or later
Go to a restaurant					
Visit friends or family in their homes					
Use public transportation					
Join a cultural event/gathering					
Go to a gym/sports facility					
Travel domestically					
Travel to another country					

MORE DEMAND CAN CONTINUE TO BE EXPECTED FOR GROCERIES, CLEANING PRODUCTS AND PERSONAL CARE ITEMS.



















When the period of movement restrictions is over, do you plan to spend more, less or the same amount of money on the below items or activities, as compared to before the Covid crisis?



CITIZENS FROM ALL COUNTRIES WILL CONTINUE TO SPEND MORE ON PRODUCTS FOR HOME USE

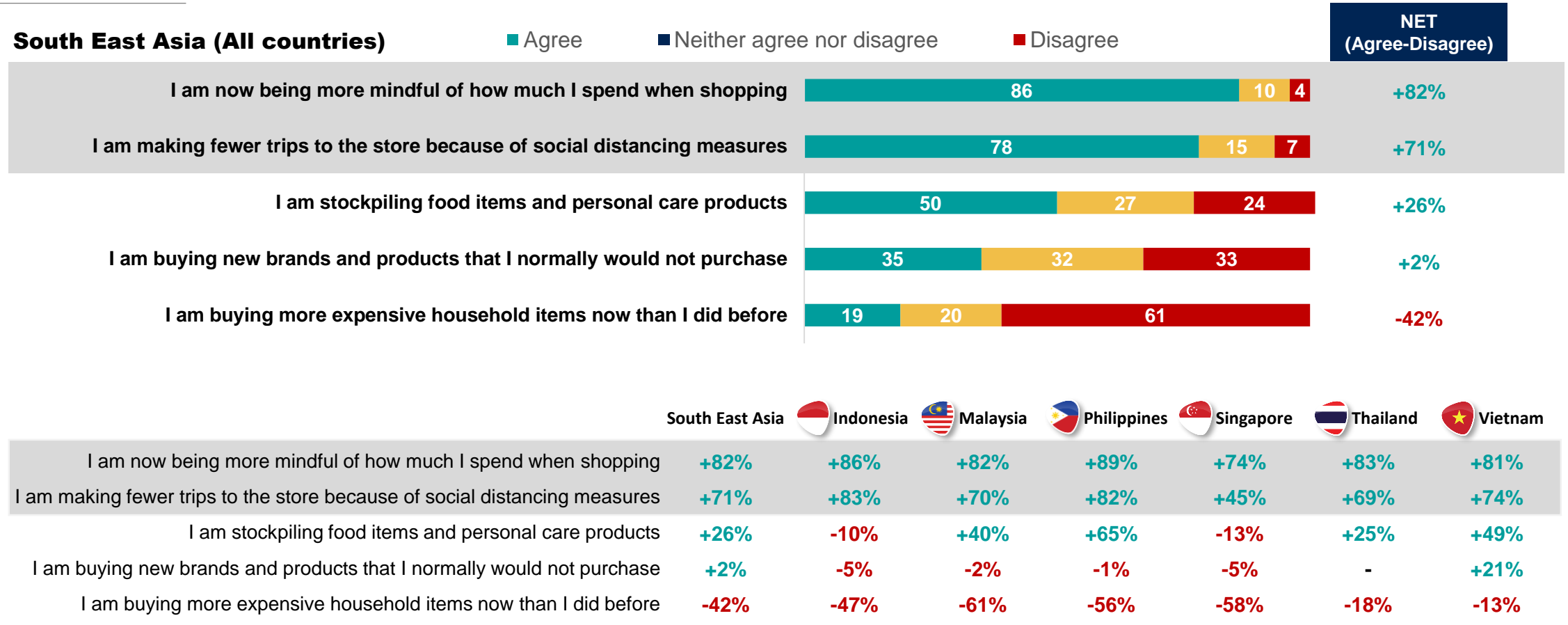
When the period of movement restrictions is over, do you plan to spend more, less or the same amount of money on the below items or activities, as compared to before the Covid crisis?

NET (More-Less)

	South East Asia	 Indonesia	 Malaysia	 Philippines	 Singapore	 Thailand	 Vietnam
 Food for cooking at home	+40%	+45%	+45%	+45%	+37%	+41%	+32%
 Personal care items	+12%	+10%	+1%	+23%	+9%	+9%	+17%
 Cleaning products	+31%	+33%	+24%	+45%	+23%	+35%	+28%
 Clothing, footwear, accessories	-25%	-16%	-41%	-30%	-24%	-20%	-17%
 Electronics	-27%	-28%	-38%	-30%	-28%	-22%	-13%
 Restaurants and cafes	-34%	-37%	-39%	-44%	-21%	-30%	-28%
 Travel	-39%	-35%	-50%	-51%	-40%	-25%	-34%
 Books	-12%	-12%	-24%	-12%	-11%	-12%	+3%
 Cultural activities	-39%	-38%	-50%	-58%	-38%	-21%	-23%
 Toys	-36%	-34%	-43%	-48%	-32%	-35%	-23%
 Video games	-23%	-21%	-32%	-33%	-18%	-20%	-18%
 Alcohol	-15%	-15%	-17%	-	-13%	-18%	-29%

HOWEVER, MOST WILL SPEND CAUTIOUSLY WHILE SHOPPING

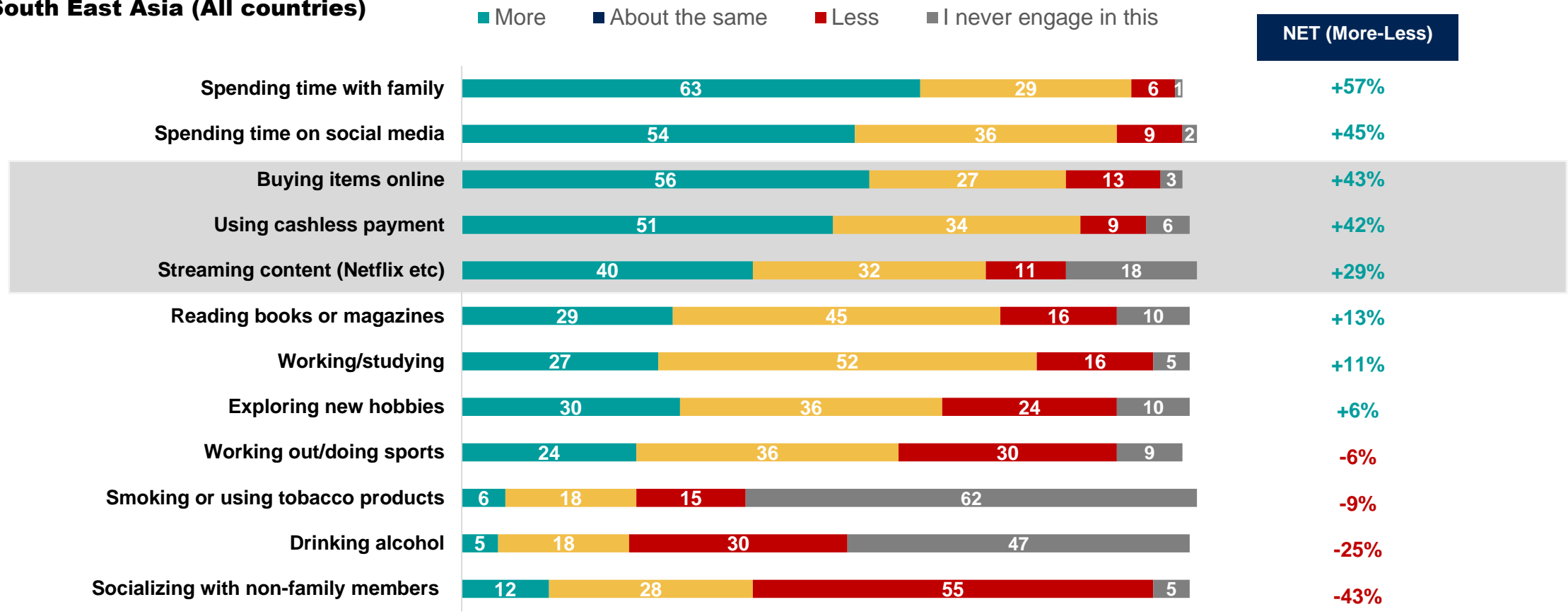
Thinking about your behaviour now compared to before Covid, how much do you agree or disagree with the following statements



THERE IS AN INCREASING DEMAND FOR DIGITAL ACTIVITIES, E-COMMERCE, CASHLESS PAYMENT.

Thinking about your habits now compared to before Covid, would you say that you do the below activities more, less or about the same?







South East Asia (All countries)



AND CITIZENS FROM ALL COUNTRIES WILL SPEND MORE ON ONLINE SERVICES AND SHIFT TOWARD DIGITAL PAYMENT.

Thinking about your habits now compared to before Covid, would you say that you do the below activities more, less or about the same?

NET (More-Less)

	South East Asia	 Indonesia	 Malaysia	 Philippines	 Singapore	 Thailand	 Vietnam
Spending time with family	+57%	+68%	+62%	+69%	+40%	+52%	+55%
Spending time on social media	+45%	+48%	+45%	+54%	+38%	+54%	+36%
Buying items online	+43%	+51%	+44%	+36%	+51%	+28%	+49%
Using cashless payment	+42%	+44%	+53%	+45%	+53%	+18%	+43%
Streaming content (Netflix etc)	+29%	+30%	+24%	+37%	+32%	+25%	+23%
Reading books or magazines	+13%	+21%	+10%	+11%	+5%	+6%	+23%
Working/studying	+11%	+13%	+7%	+18%	+11%	+2%	+17%
Exploring new hobbies	+6%	+8%	+5%	+7%	-7%	+26%	-5%
Working out/doing sports	-6%	+14%	-15%	-30%	-18%	-8%	21%
Smoking or using tobacco products	-9%	-8%	-6%	-16%	-	-10%	-14%
Drinking alcohol	-25%	-13%	-14%	-37%	-15%	-35%	-39%
Socializing with non-family members	-43%	-39%	-44%	-51%	-48%	-47%	-33%



Part 3 : Impact on various sectors and product categories

As people stay mostly at home, groceries and home cleaning products, may continue to see a surge in demand. However, a longer recovery is expected for travel (especially international) and social events.

Also penetration of e-commerce will continue to get a boost and shoppers show an increasing shift towards online services and digital payments.

**BE
SURE.
GO
FURTHER.**

For more information regarding this report:

Indonesia

Indah Tanip
Associate Project Director, Observer
Indah.Tanip@ipsos.com

Singapore

Abhishek Choudhary
Associate Research Director, Innovation
Abhishek.Choudhary@ipsos.com

Philippines

Cielo Remorin
Business Development Manager
Cielo.Remorin@ipsos.com

Malaysia

Nik Tasha
Client Officer
Nik.Tasha@ipsos.com

Thailand

Aitsanart Wuthithanakul
Business Activation Director
Aitsanart.Wuthithanakul@ipsos.com

Vietnam

Thuy Nguyen Thu
Associate Research Director, Client Org
Thuy.NguyenThu@ipsos.com

GAME CHANGERS

