

IPSOS SEA AHEAD SHIFTS & SENTIMENTS

Findings from Ipsos SEA Study

**WATCH WEBINAR
RECORDING**

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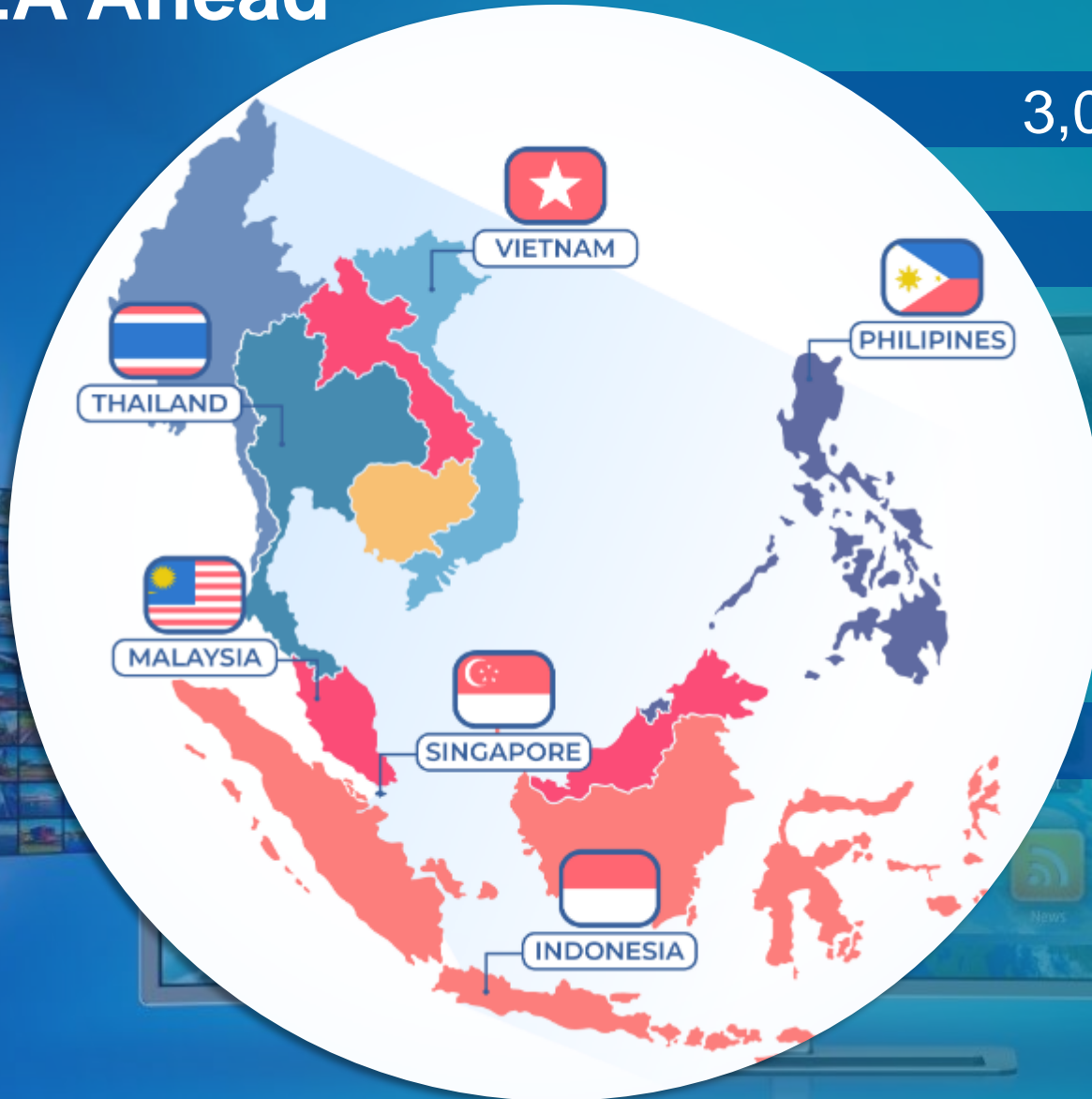
Moderated by
Viraj Juthani
Group Service Line Leader - Thailand



GAME CHANGERS



Ipsos SEA Ahead



3,000 adults in SEA / Wave

6 markets

- *Singapore*
- *Malaysia*
- *Indonesia*
- *Thailand*
- *Philippines*
- *Vietnam*

5 Waves:

- May 2020
- Sept 2020
- Feb 2021
- June 2021
- **November 2021**



**SHIFTING
CONTEXT**



**DYNAMIC
SHOPPING**



**BEYOND THE
SURFACE**

IPSOS SEA AHEAD

SHIFTING CONTEXT

EVOLVING SEA CITIZENS' CONCERNS &
SENTIMENTS

Kiranjit Singh
Head of Strategy3

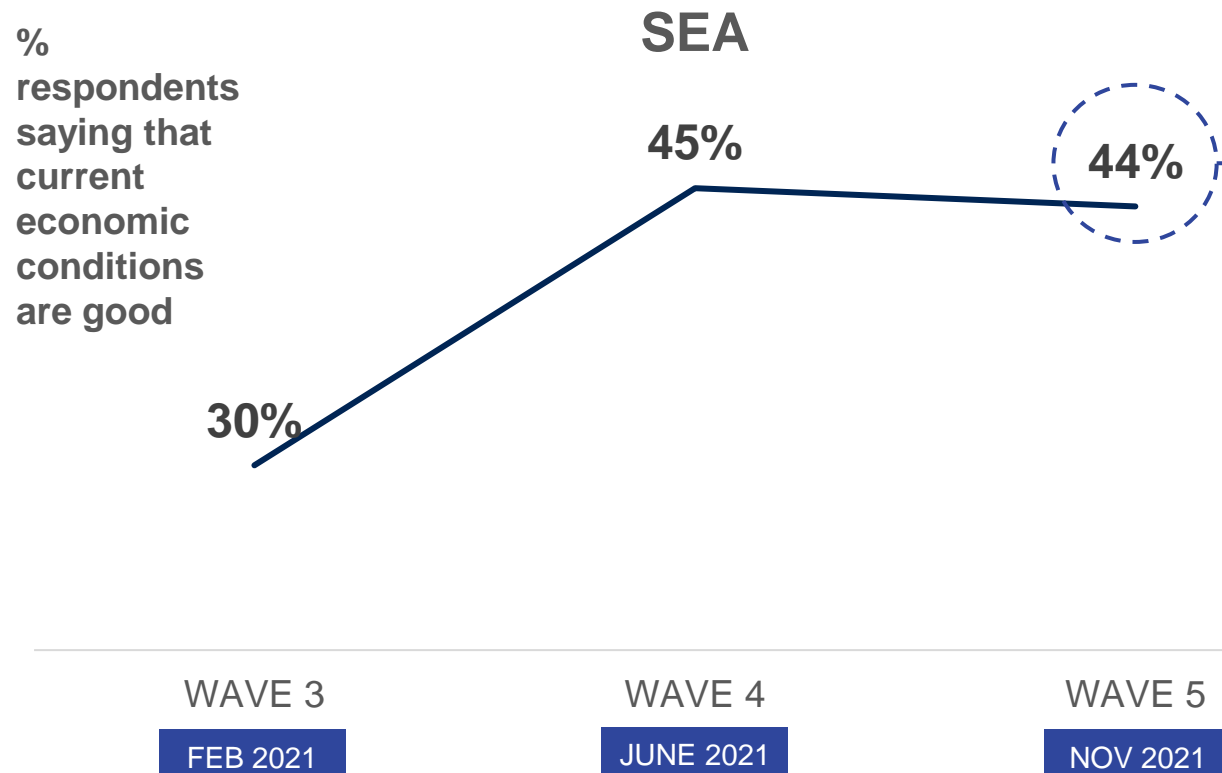


How stronger are we compared to a year ago?

Our findings showed that the society is still feeling fragile and vulnerable



DESPITE ECONOMIC CONDITIONS IMPROVING SINCE BEGINNING OF THE YEAR, MAJORITY STILL THINK THE ECONOMIC CONDITIONS ARE POOR



57% think the economic conditions are good.



Only **22%** think the economic conditions are good.

Q: How would you describe the current economic situation in your country? (T2B: Very Good/Somewhat Good)

Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

WHILE WE SEE A POSITIVE UPWARD TREND, ONLY 51% OF THE POPULATION ARE EXPECTING THE ECONOMY TO IMPROVE IN THE NEXT 6 MONTHS

% respondents expecting a stronger economy in the next 6 months

SEA

42%

46%

51%

WAVE 3
MONTH?

WAVE 4
MONTH?

WAVE 5
NOV



Almost **80%** expecting a stronger economy.



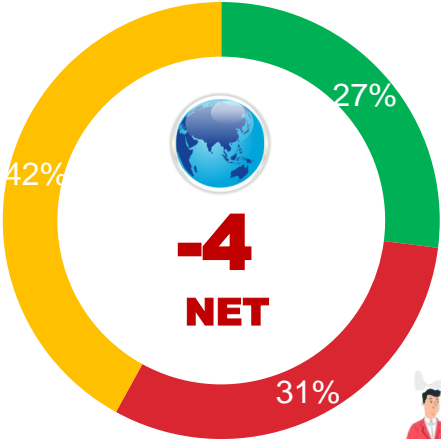
Only **35%** think the economy will improve.

Q: Looking ahead six months from now, do you expect the economy in your local area to be (T2B: Much Stronger/Somewhat Stronger)

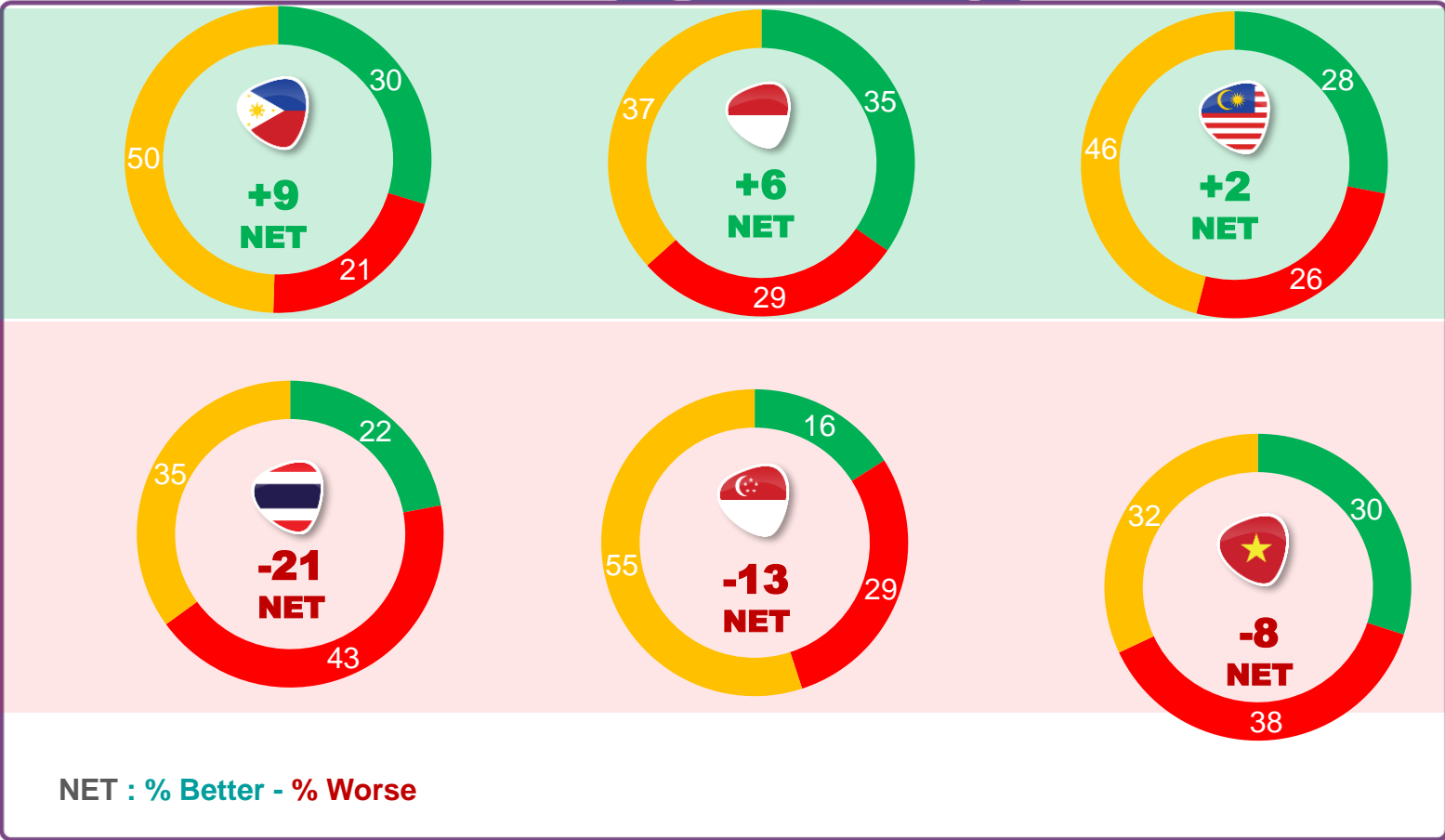
Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

COMPARED TO A YEAR AGO, ABOUT 1 IN 3 ARE FINANCIALLY WORSE OFF

SEA Average



- Better Off
- About the same
- Worse Off

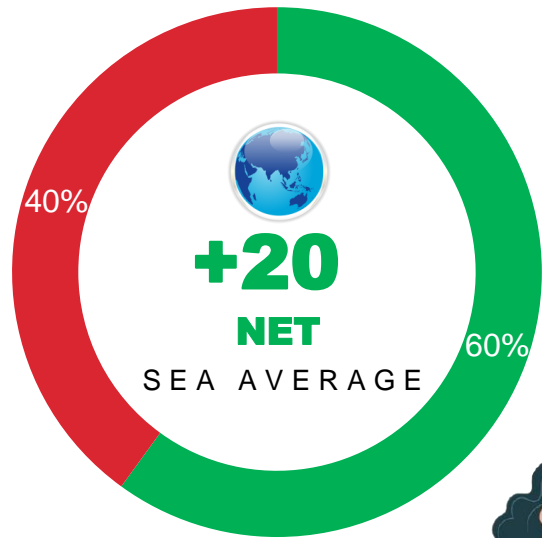


Q: Would you say that you and your family are financially better off, worse off, or just about the same as you were a year ago?

Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021



40% OF WORKERS ARE NOT SATISFIED IN THEIR CURRENT JOB

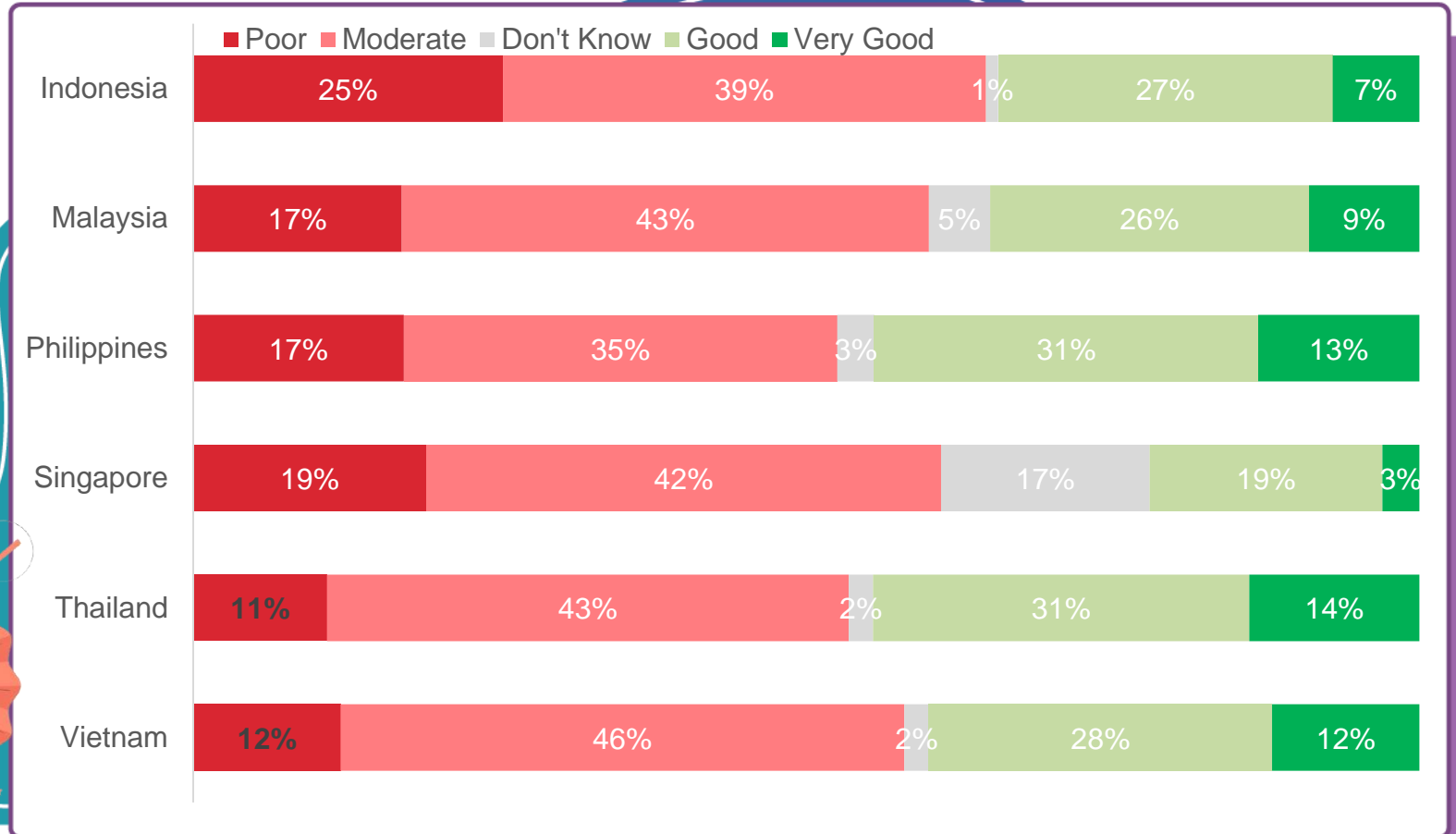
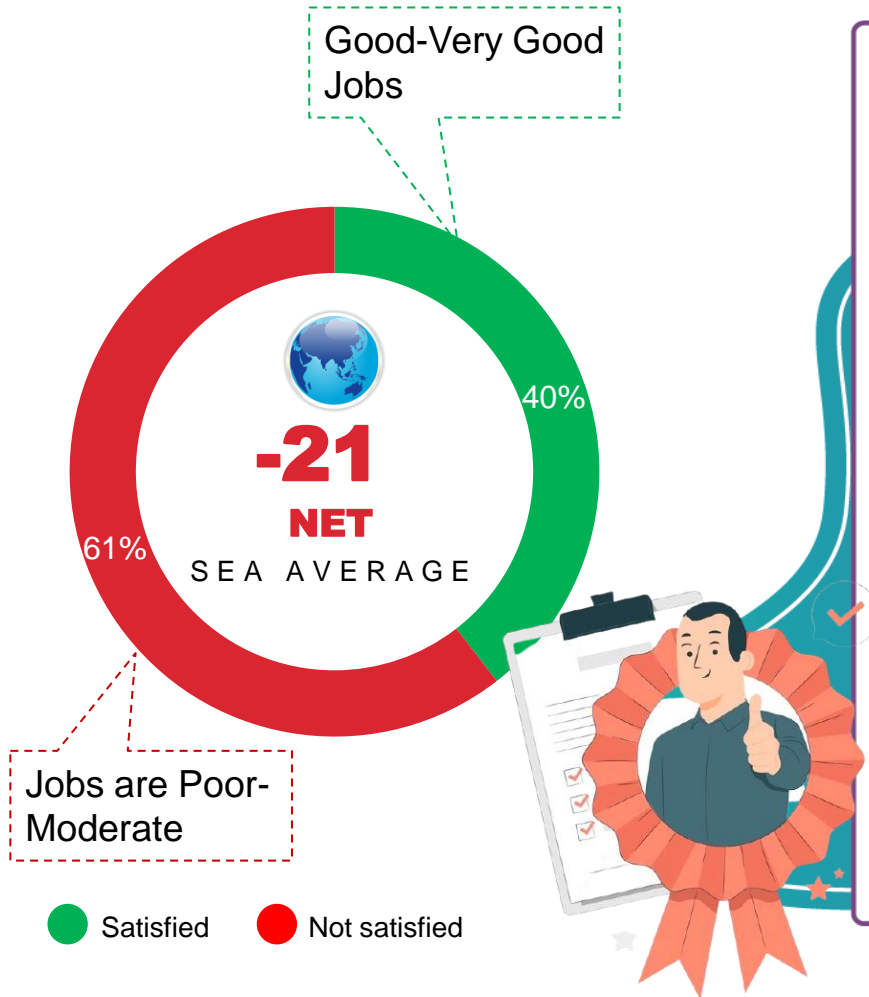


● Satisfied ● Not satisfied



Q: How satisfied are you with your current job?

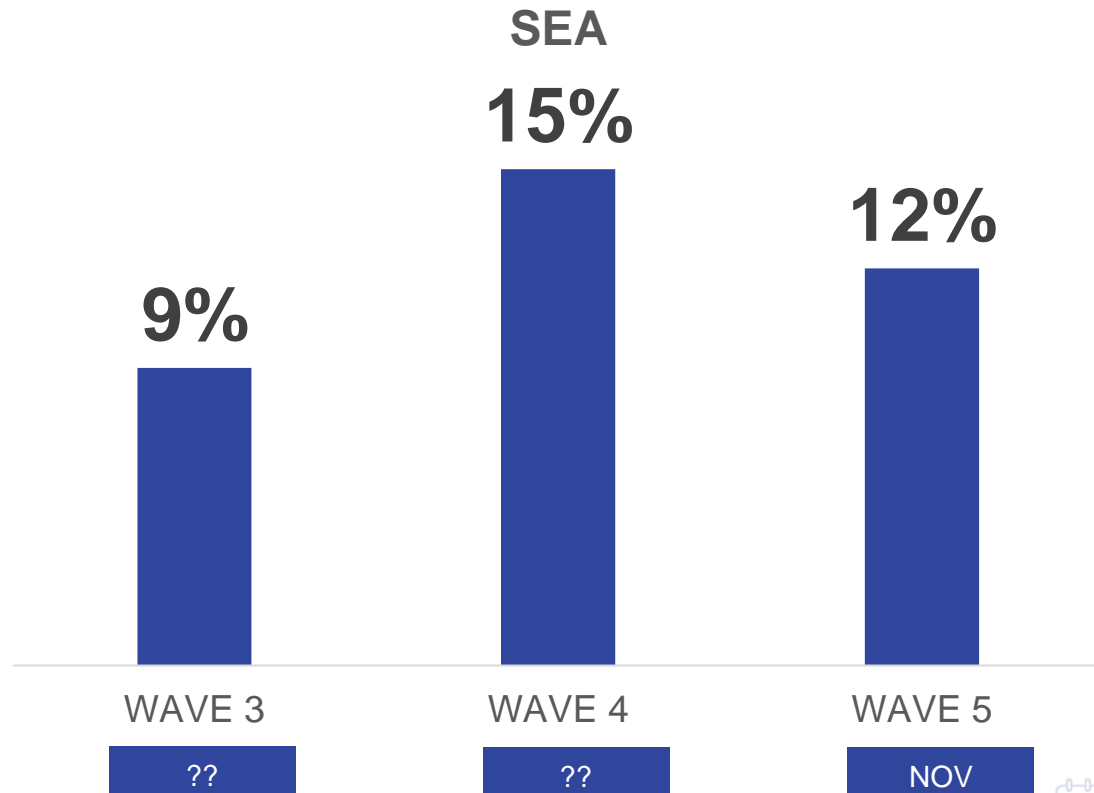
ABOUT 60% RATED THE AVAILABILITY OF GOOD JOBS IN THEIR AREAS AS LIMITED



Q: How would you rate the availability of good jobs in the area where you live?

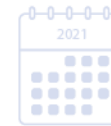
CONFIDENCE IN JOB SECURITY HAS NOT IMPROVED MUCH SINCE BEGINNING OF THE YEAR WITH ONLY 12% FEELING MORE CONFIDENT

% respondents currently more confident of job security compared to 6 months ago



Q: Compared to 6 months ago ,are you NOW More-Less Confident

Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

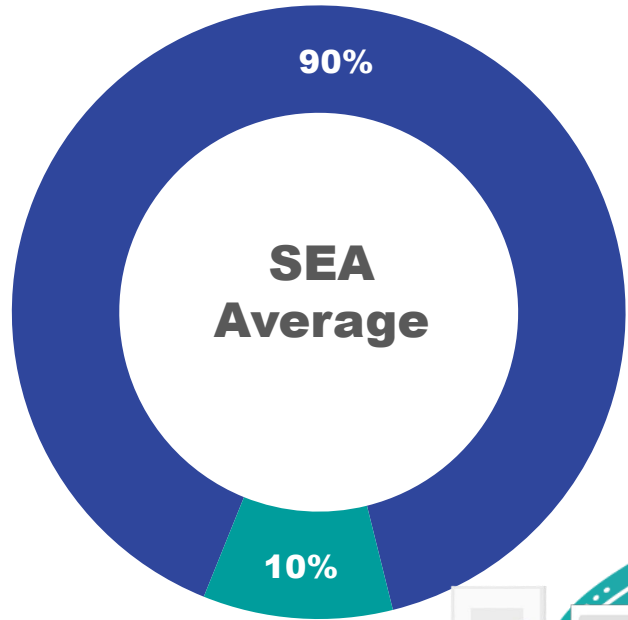


Looking ahead... how will the pandemic shape the future of SEA

One way of answering this question is to understand how significant is the pandemic in shaping people's views

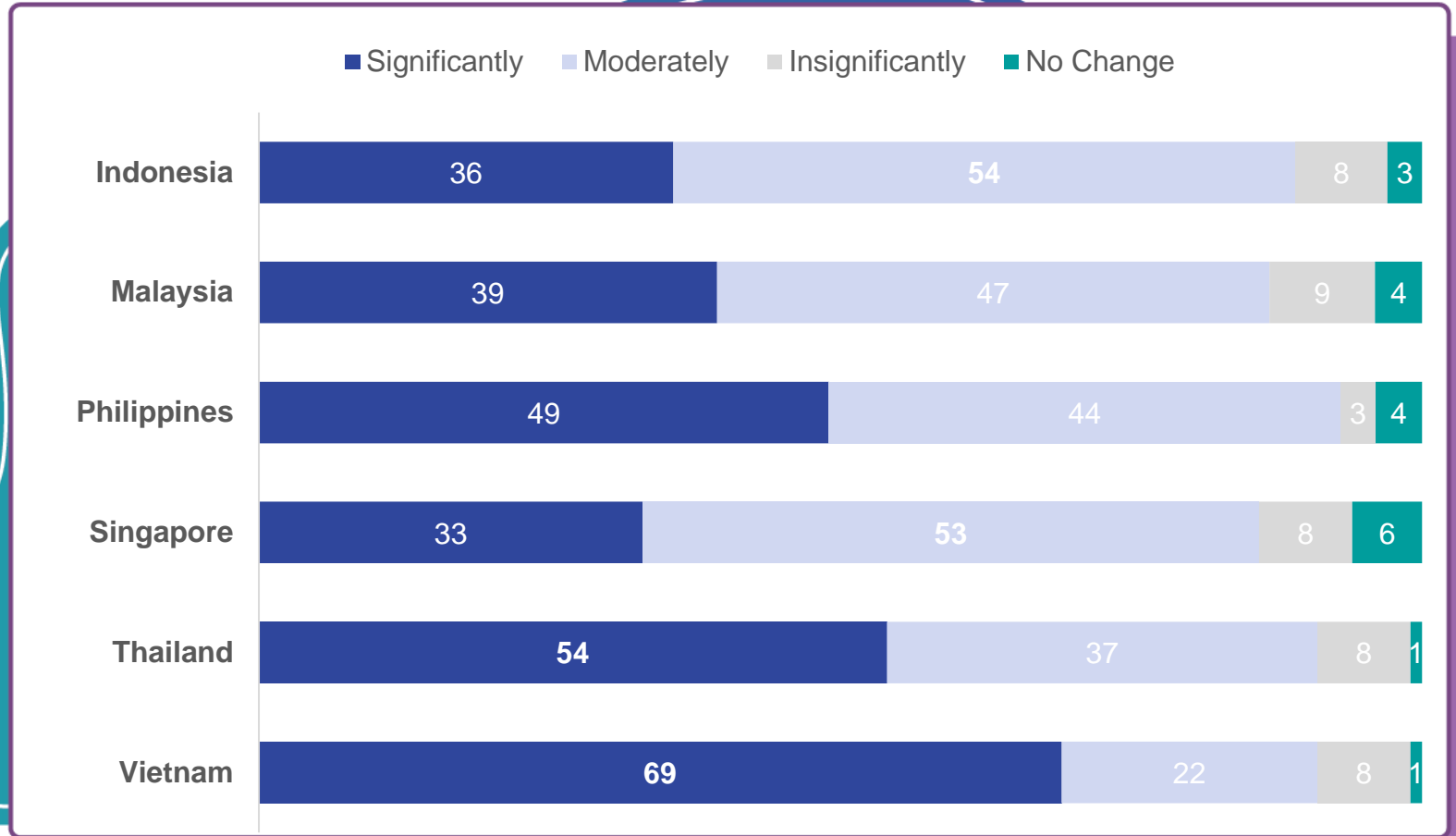
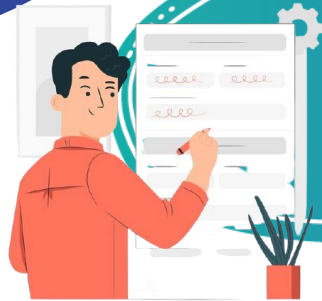


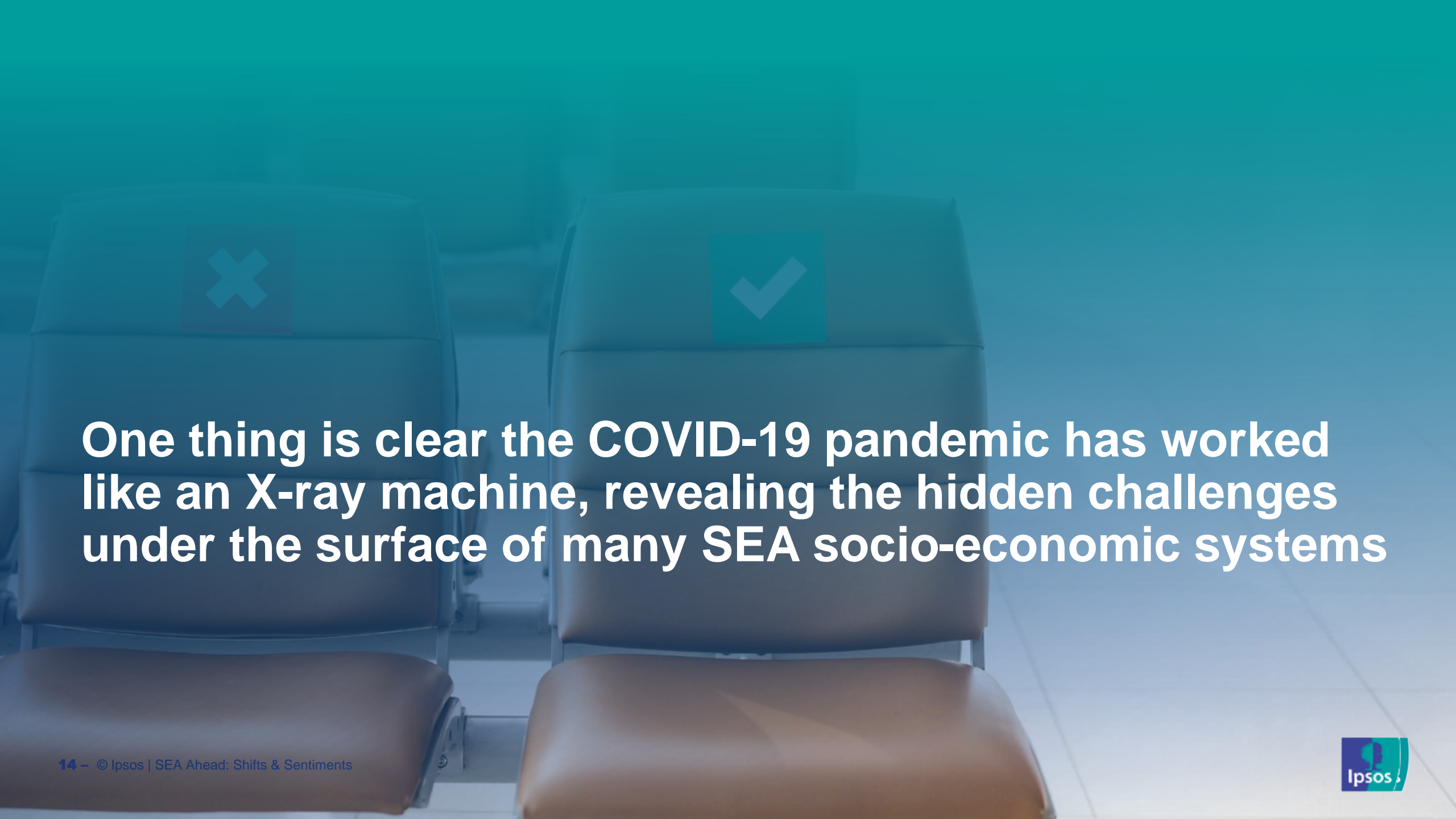
ABOUT 90% OF SEA CLAIMED THAT THE PANDEMIC HAS IMPACTED THEIR FUTURE OUTLOOK IN LIFE AND LIFESTYLE, WITH 50% STATED THE IMPACT IS SIGNIFICANT



Q: How much has Covid-19 pandemic impacted your outlook in life and your lifestyle?

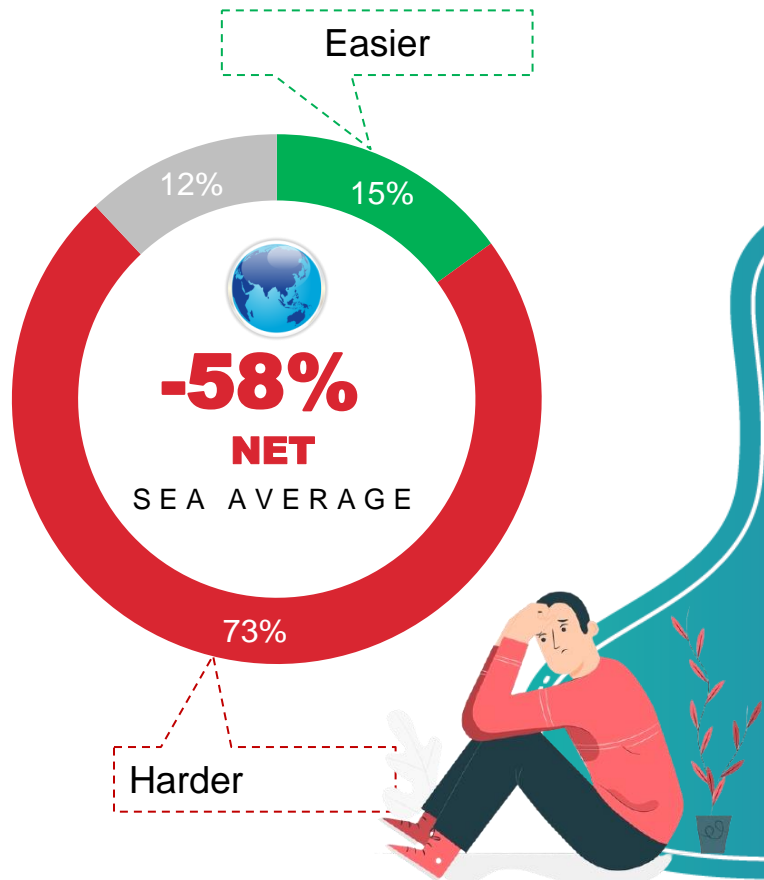
Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021



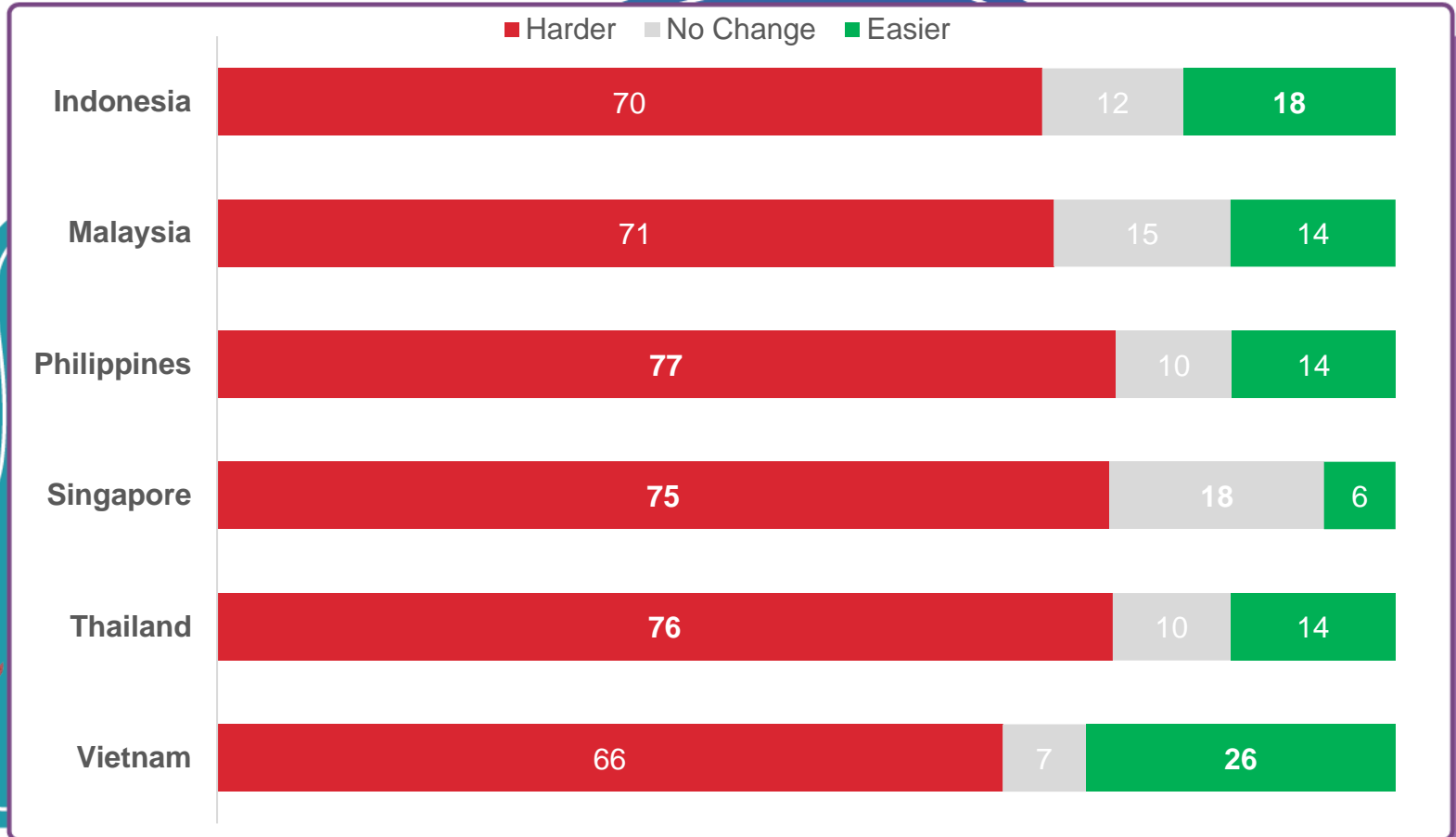


One thing is clear the COVID-19 pandemic has worked like an X-ray machine, revealing the hidden challenges under the surface of many SEA socio-economic systems

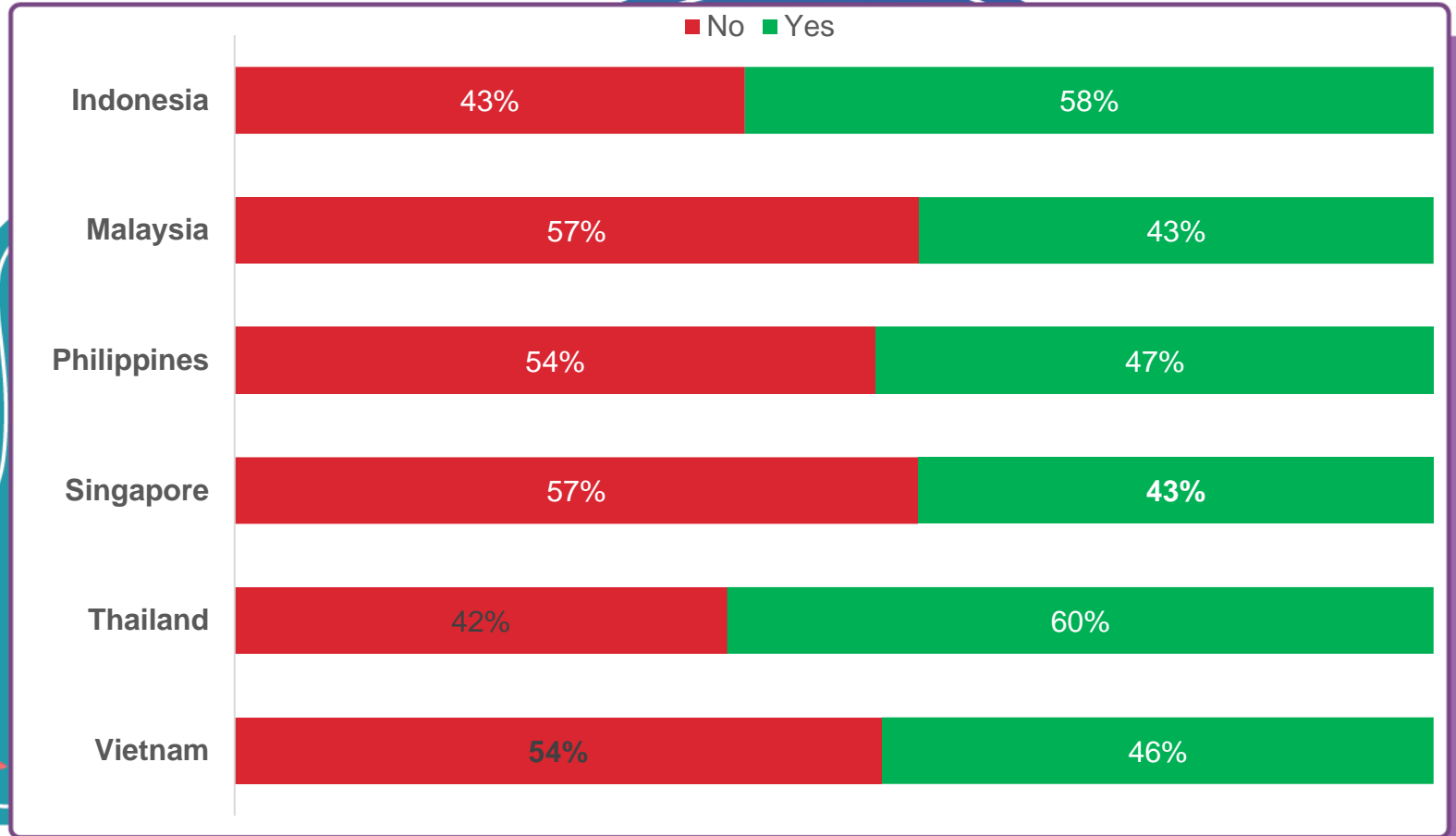
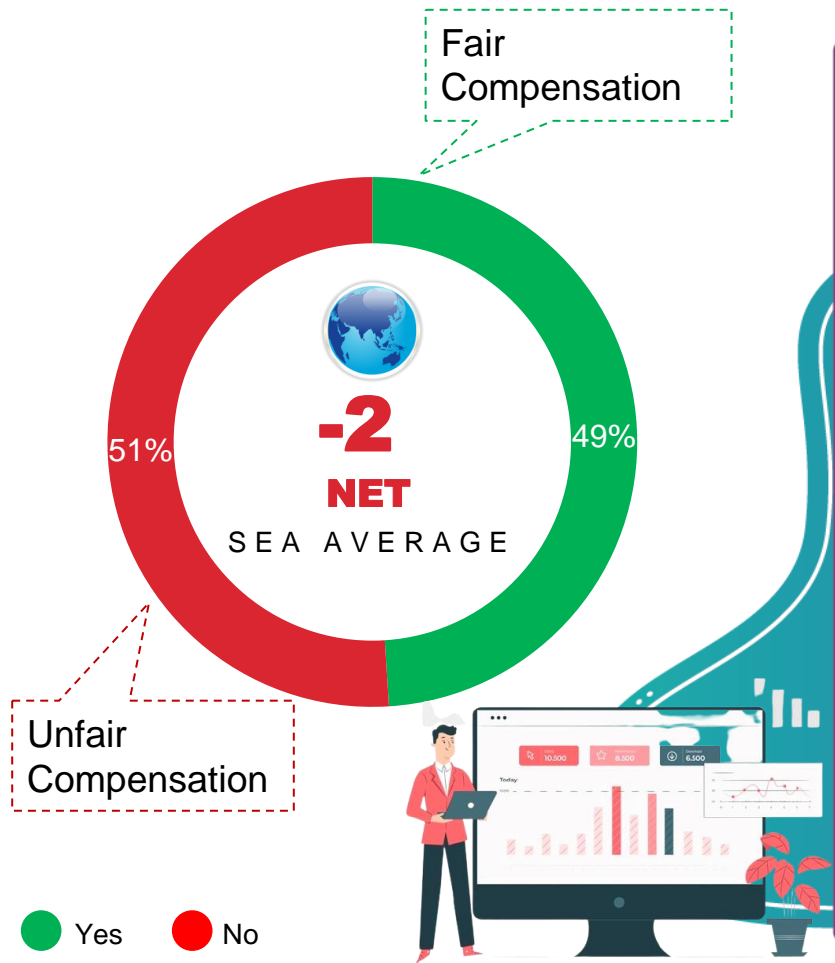
OVERWHELMING MAJORITY FEEL IT'S GETTING HARDER TO SUCCEED DESPITE WORKING HARD



Q: Do you think it is getting easier or harder for someone who works hard to succeed compared to a year ago?



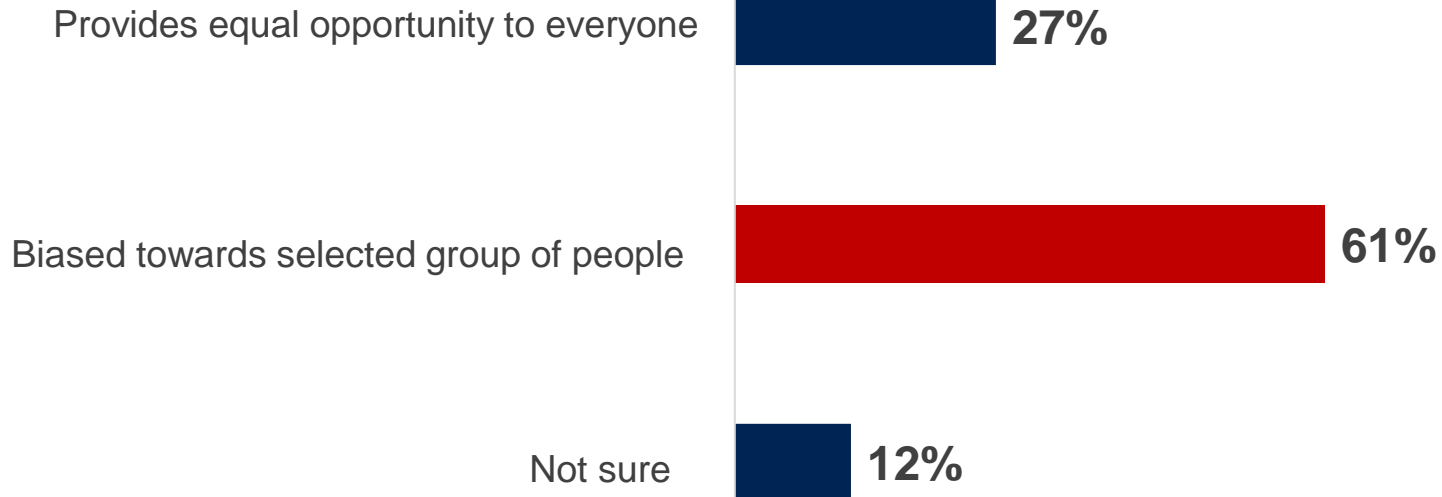
THERE IS AN EVEN SPLIT BETWEEN THOSE WHO FEEL THAT WORKERS ARE FAIRLY COMPENSATED VS THOSE WHO THINK OTHERWISE



Q: In general, do you think the regular workers are fairly compensated for their work?
 Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

ABOUT 60% BELIEVE THAT CURRENT ECONOMIC SYSTEM DOES NOT PROVIDE EQUAL OPPORTUNITY TO EVERYONE TO SUCCEED

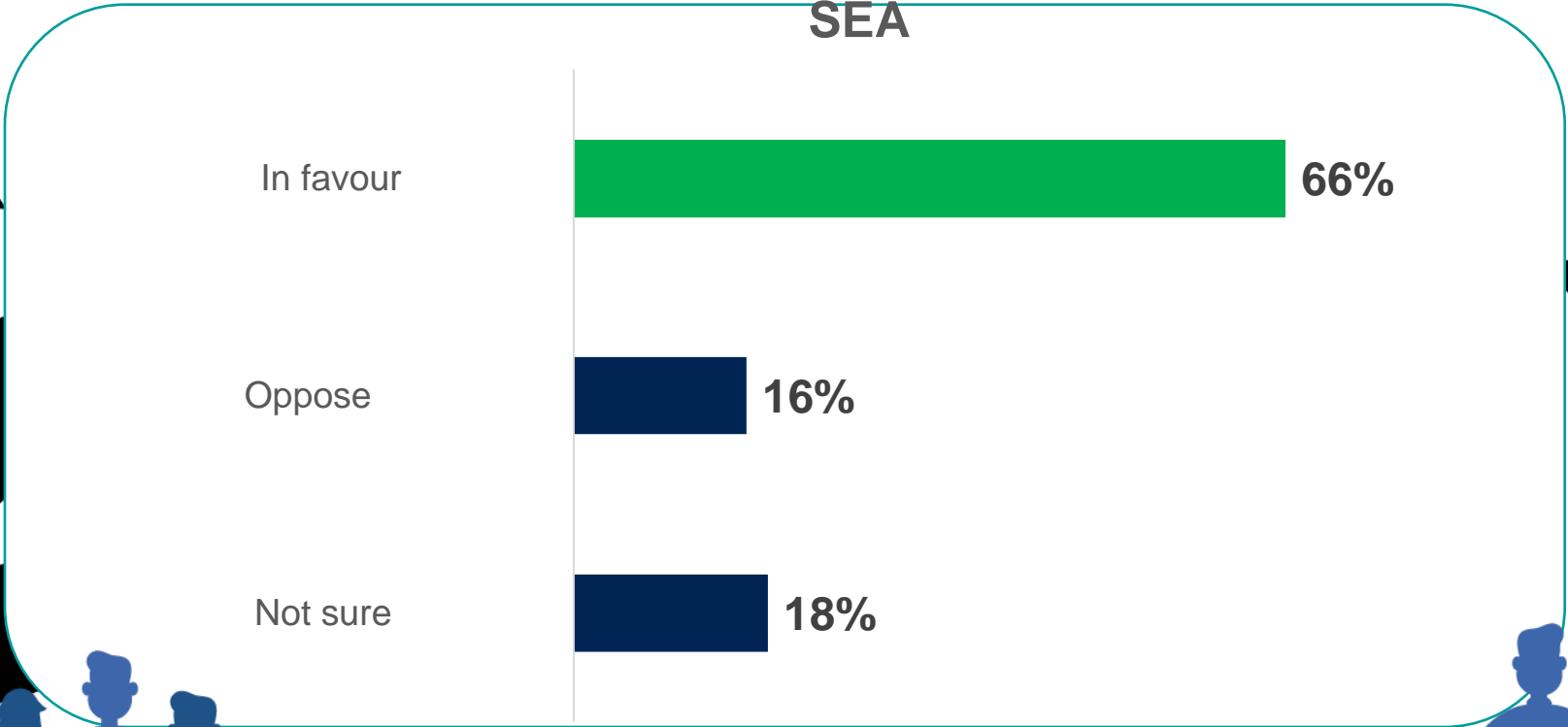
SEA



Q: Do you think the current economic system is fair (i.e. provides equal opportunities for everyone to succeed) or biased towards selected groups (i.e. privileged & rich elites, the well-connected)

Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

UBI, WHICH DID NOT HAVE MUCH TRACTION IN THE PAST, 66% ARE IN FAVOUR OF HAVING SOME FORM OF NATIONAL GUARANTEED INCOME FOR EVERY ADULT CITIZEN



Q: Would you support a policy in providing every adult citizen a guaranteed income, sometimes called a 'Universal Basic Income' of about XX a month?



The pandemic is a major shock and history has shown us that any major shock will have some ramifications to the existing economic and social systems

THE PANDEMIC HAS ALREADY FORCED BUSINESSES, SOCIETY AND GOVERNMENTS TO CHANGE THEIR PERSPECTIVES IN CERTAIN AREAS, FOR EXAMPLE...



SUPPLY CHAIN



BUSINESS MODELS

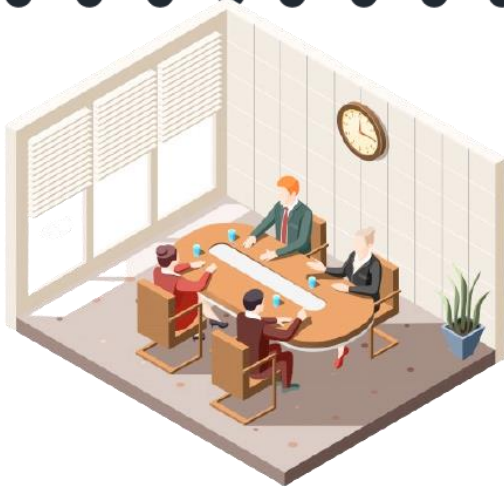


SOCIAL SYSTEMS

Pre-pandemic	Post-pandemic
Just-in-time	Just-in-case
Robustness	Resilience
Aids should be targeted to those who need it most	Aids can and should be universal so that no one falls between the crack

IN THE COMING YEARS, THE PEOPLE OF SEA WILL DEMAND AND EXPECT MORE FROM THEIR SOCIAL CONTRACT WITH GOVERNMENT AND BUSINESSES

Income inequality in Singapore fell to a historic low in 2020 due to “massive transfers” and schemes tilted towards supporting lower income groups, however, more needs to be done.



- Governments will need to ensure that the socio-economic system is equitable. We are already seeing efforts in that direction e.g.:
 - China – Common Prosperity Vision
 - Malaysia – Shared Prosperity Vision



- Businesses will need to ensure they are:
 - Making **meaningful social impact**, be it to their customers, employees or the community they operate in e.g. sustainability,
 - **Enhancing customer experience** by offering more empowering channels of engagement e.g. livestreaming

IPSOS SEA AHEAD



DYNAMIC SHOPPING

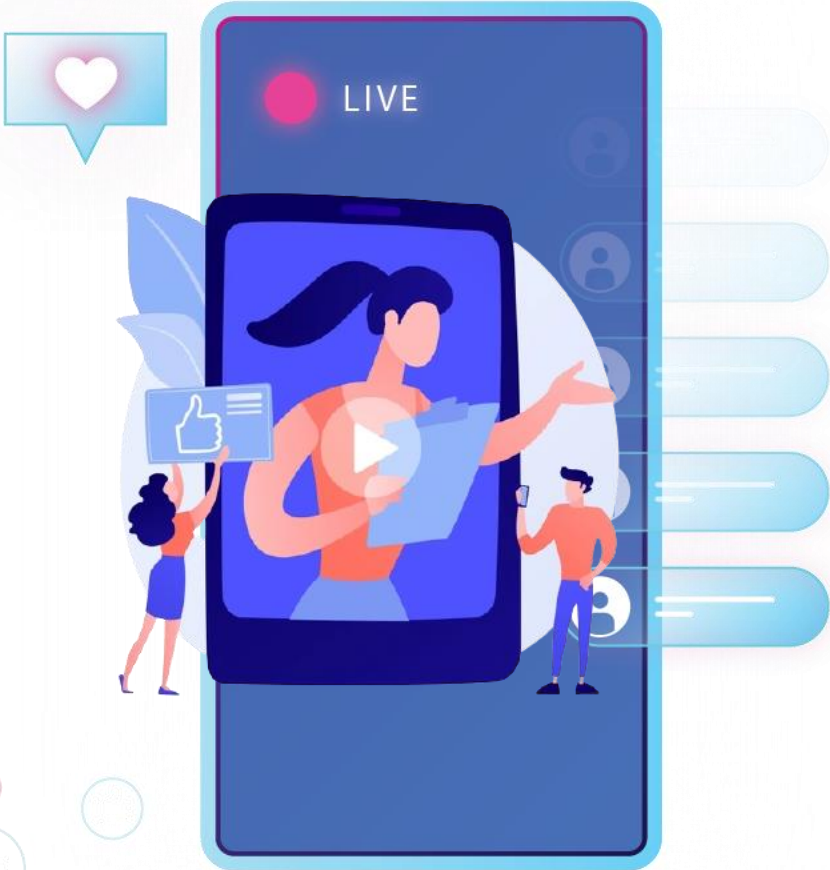
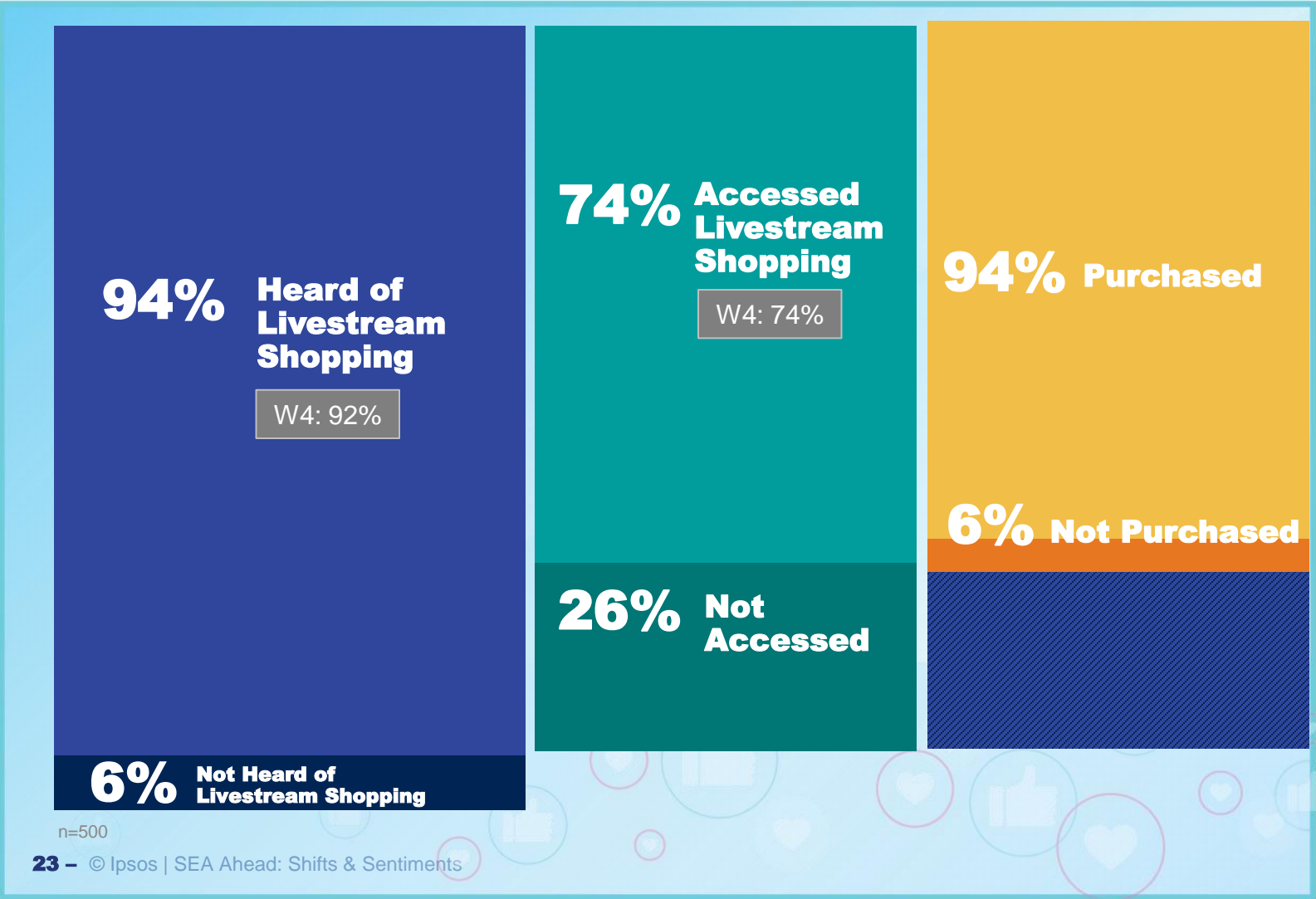
A LOOK INTO LIVESTREAM SELLING IN VIETNAM

Ngan Ly

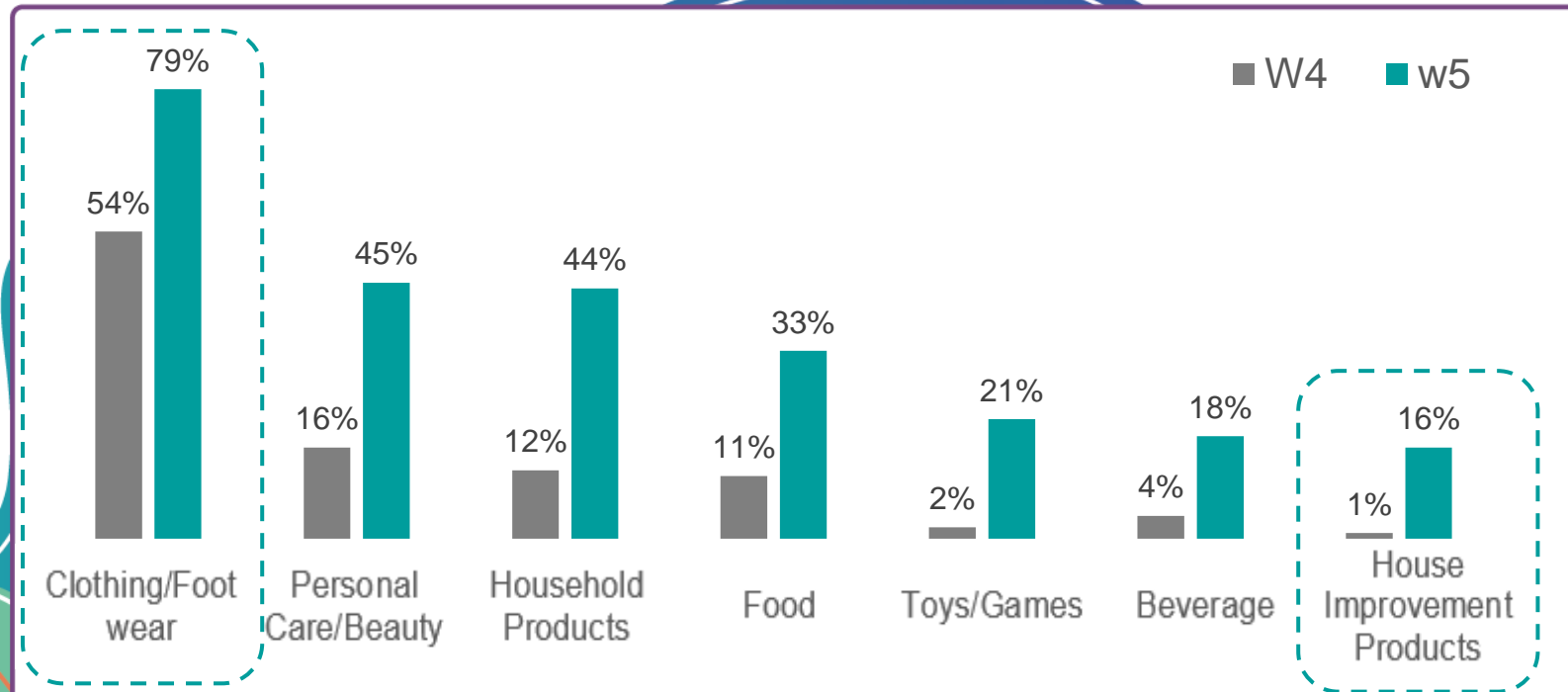
Managing Director- Vietnam



Livestream is among top marketing trends in Vietnam in 2021



Items purchased in a livestream



GIẢM 50%

Mã P7

Serum ngừa mụn Pharmacy (12ml)

169.000 VND

84.500 VND/hộp

Pharmacy

#SĐT_MÃ_P_SỐ_LƯỢNG_MUA_HÀNG

MC Ngọc Hà & MG-Thanh Tuyền

stream Hội Thảo Chuyển Nhượng Bất Động Sản Dự án 2021 Được ghi trực tiếp

hcombank Việt Nam

Bình luận Chia sẻ

249 · 69

Thành Thúc Thủy và các...
Sendo Official: các bạn nhân vào giờ hàng bán trái để mua hàng nhé. Thành toàn zalopay sẽ đc hỗ trợ phí vận chuyển 50K nhé!
Sendo Official: Ban Thúc trưởng ơi, có ship HCM nha ban

Livestream is a billion-dollar sector in Vietnam

[LIVE] Livestream khủng của TPBank được các bạn yêu thích đã quay trở lại v... Được ghi trực tiếp

TPBank

Vi chúng tôi hiểu bạn

Tải app TPBank, có tài khoản dùng ngay, Sẵn vé gặp Tùng tháng 10!

THÁCH ĐẤU THẦN TỐC

Thích Bình luận Chia sẻ

2,3K · 1,3K bình luận

#BEBOLDFORCHANGE

KIẾN TẠO THẦN THÁI GẶT HÁI TỰ TIN

LIVE STREAM FE CREDIT Stories

19:30 CN, 07/03

- Định hình phong cách cá nhân
- Yêu bản thân, sống trọn vẹn

Đừng bỏ lỡ MÓN QUÀ ĐẶC BIỆT dành cho CÁC NÀNG THƠ FEC

Hiện kim 2.000.000 VND 3 thời Sơn CHANEL

Style & Life Coach Bùi Việt Hà MC Tú Trinh

FE CREDIT

FE CREDIT STORIES đã phát trực tiếp. 7 tháng 3 ·

LIVESTREAM "KIẾN TẠO THẦN THÁI, GẶT HÁI TỰ TIN" NHẬN... #BEBOLDFORCHANGE ... Xem thêm

148 527 bình luận 5,8K lượt xem

Thích Bình luận Chia sẻ

Bình luận

Phù hợp nhất

Người chia sẻ FE CREDIT STORIES · 14:52 THAM GIA NGAY ... Minigame 1: Comment con số may mắn từ 1-1000 & share livestream để có cơ hội may mắn nhận Voucher hiện kim trị giá 2.000.000 VND Cú pháp: SĐT- Số may mắn

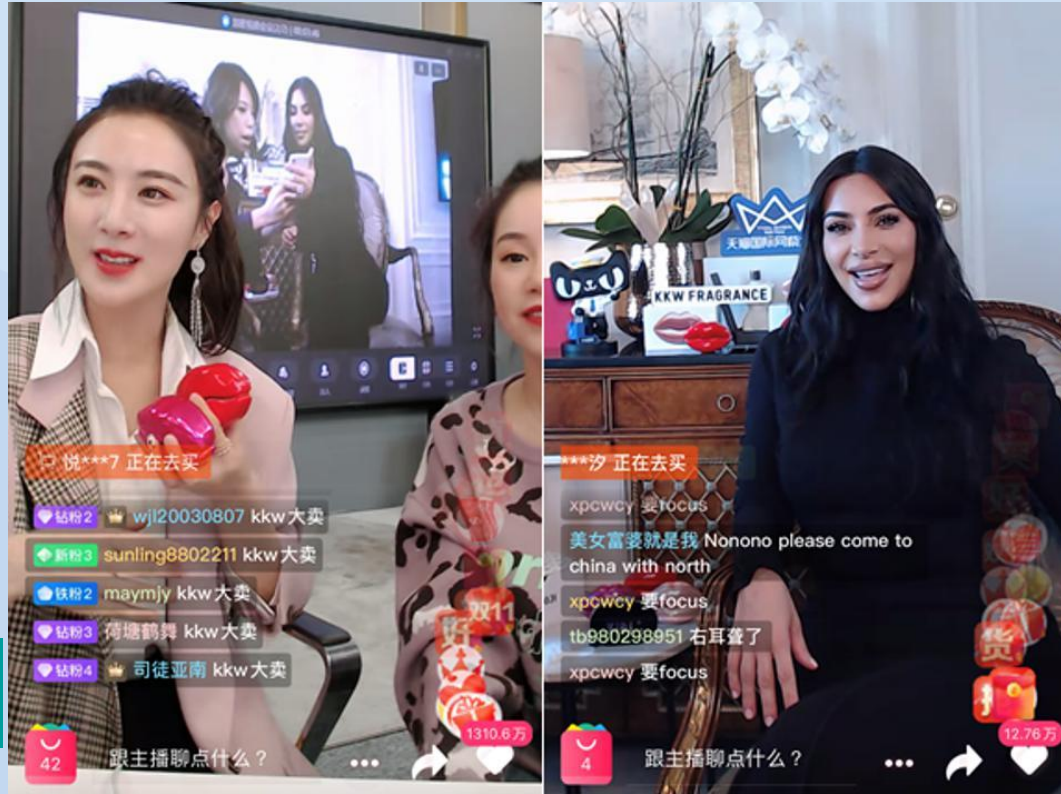
AND THE SHOW MUST GO ON

64%

Joined livestream shopping event to obtain for product knowledge

42%

who have not purchased plan to buy in the future



IPSOS SEA AHEAD

BEYOND THE SURFACE

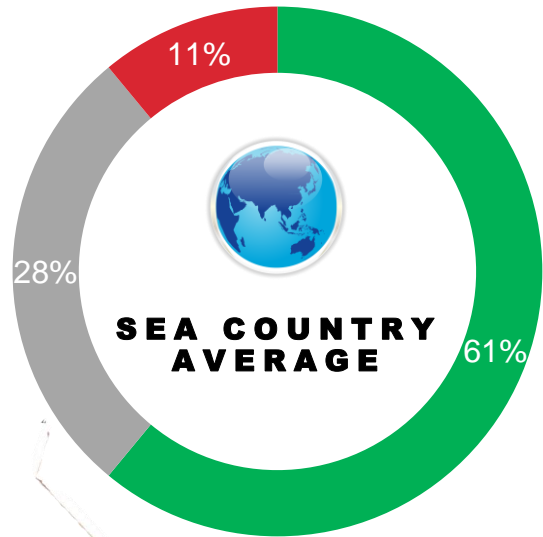
GROWING CONCERN ON CLIMATE CHANGE IN THAILAND

Usana Chantarklum
Managing Director- Thailand

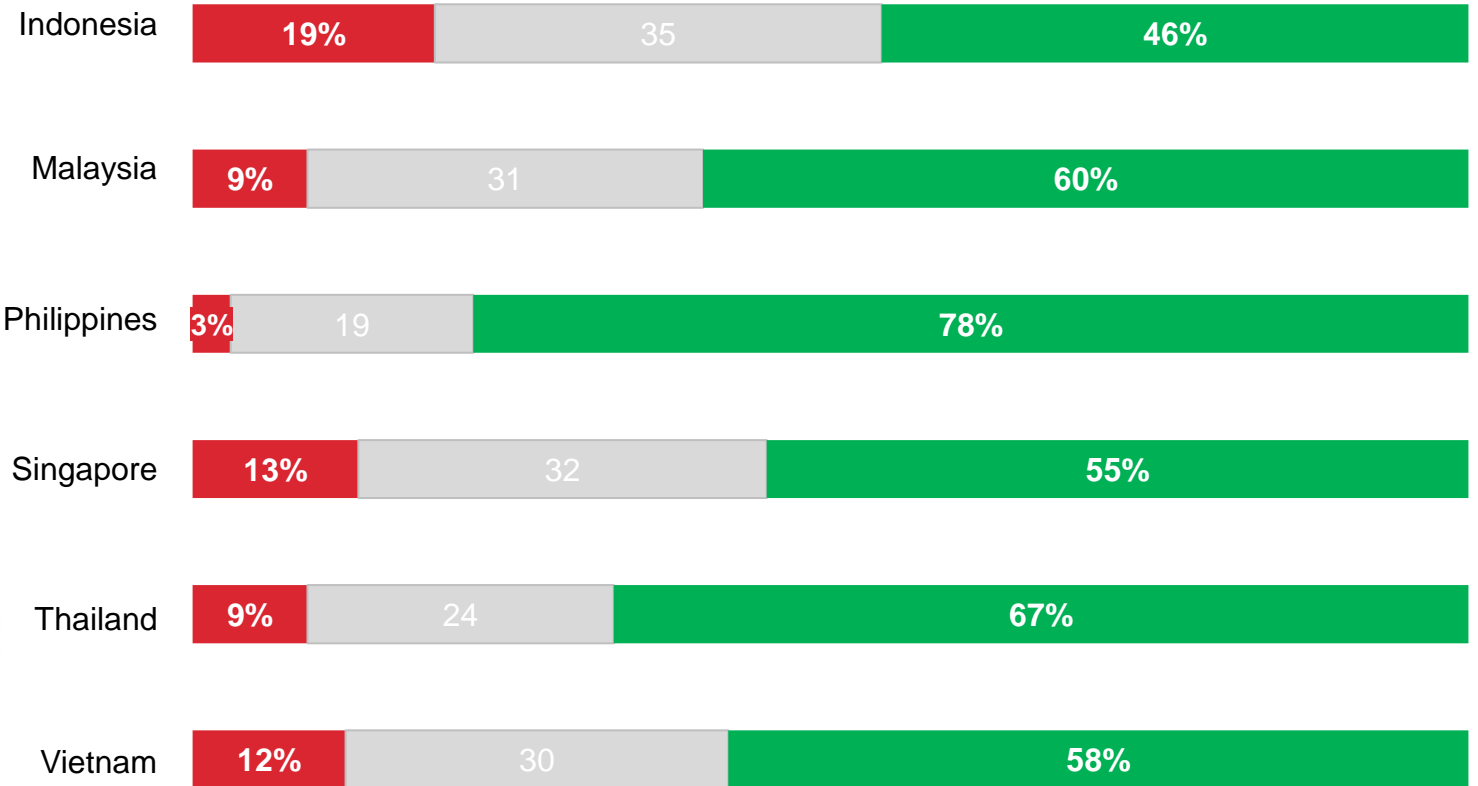


Growing Online Shopping/e-Commerce, growing concerns about environment?

“I AM CONCERNED ABOUT THE ENVIRONMENTAL IMPACT OF E-COMMERCE”



■ Disagree ■ Agree



Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

CLIMATE ANTAGONISM



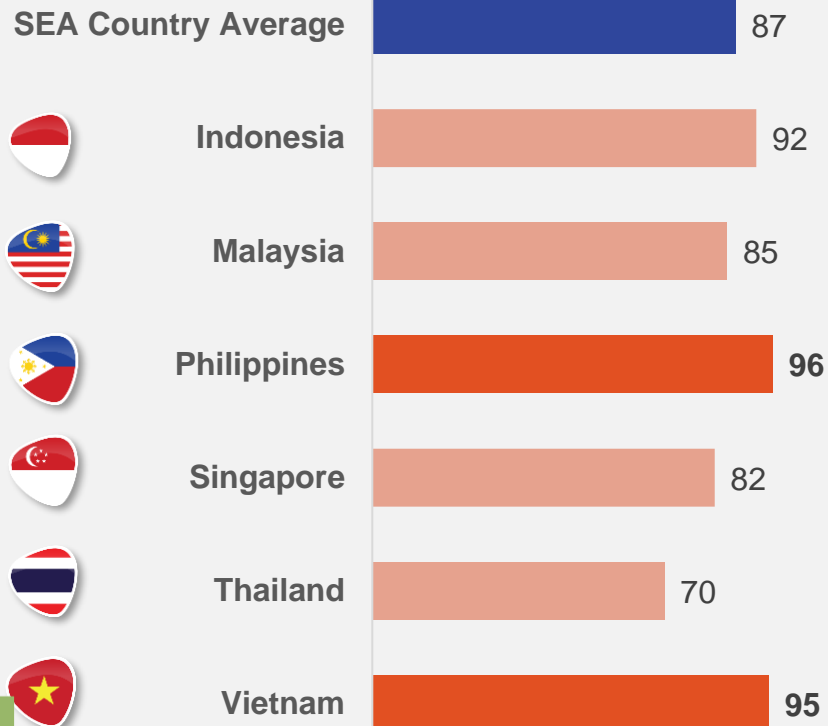
83%

“We are heading for environmental disaster unless we change our habits quickly”

92%

While most believe the key causes for climate change is mainly human activity, but considering the seriousness of the threat, do we need to do more?

CLIMATE CHANGE IS A SERIOUS THREAT

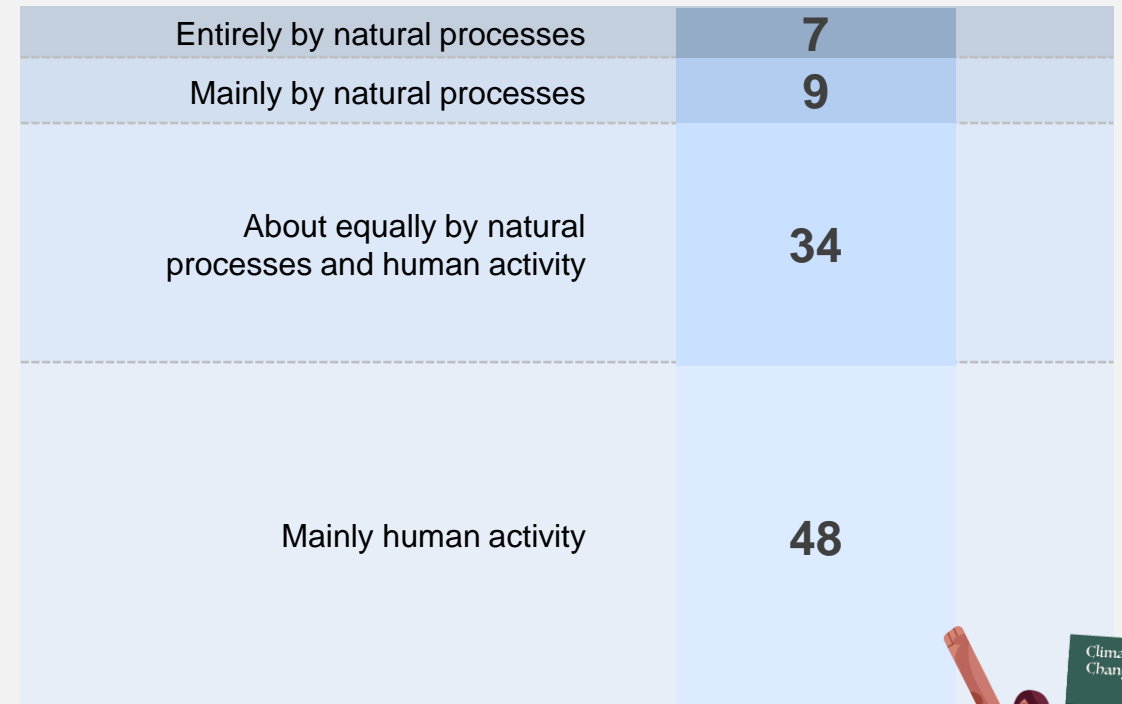


CLIMATE CHANGE IS A SERIOUS THREAT

Base Total n=3000; n=500 per country, Fieldwork Dates: 29 October to 8 November 2021

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KEY CAUSES FOR CLIMATE CHANGE



% SEA COUNTRY AVERAGE

Q: What are the key causes for climate change?

Q: In your opinion, how serious of a threat is climate change to the economy and quality of life? (Top 2 Box: Very Serious/Somewhat Serious)



Consumers...

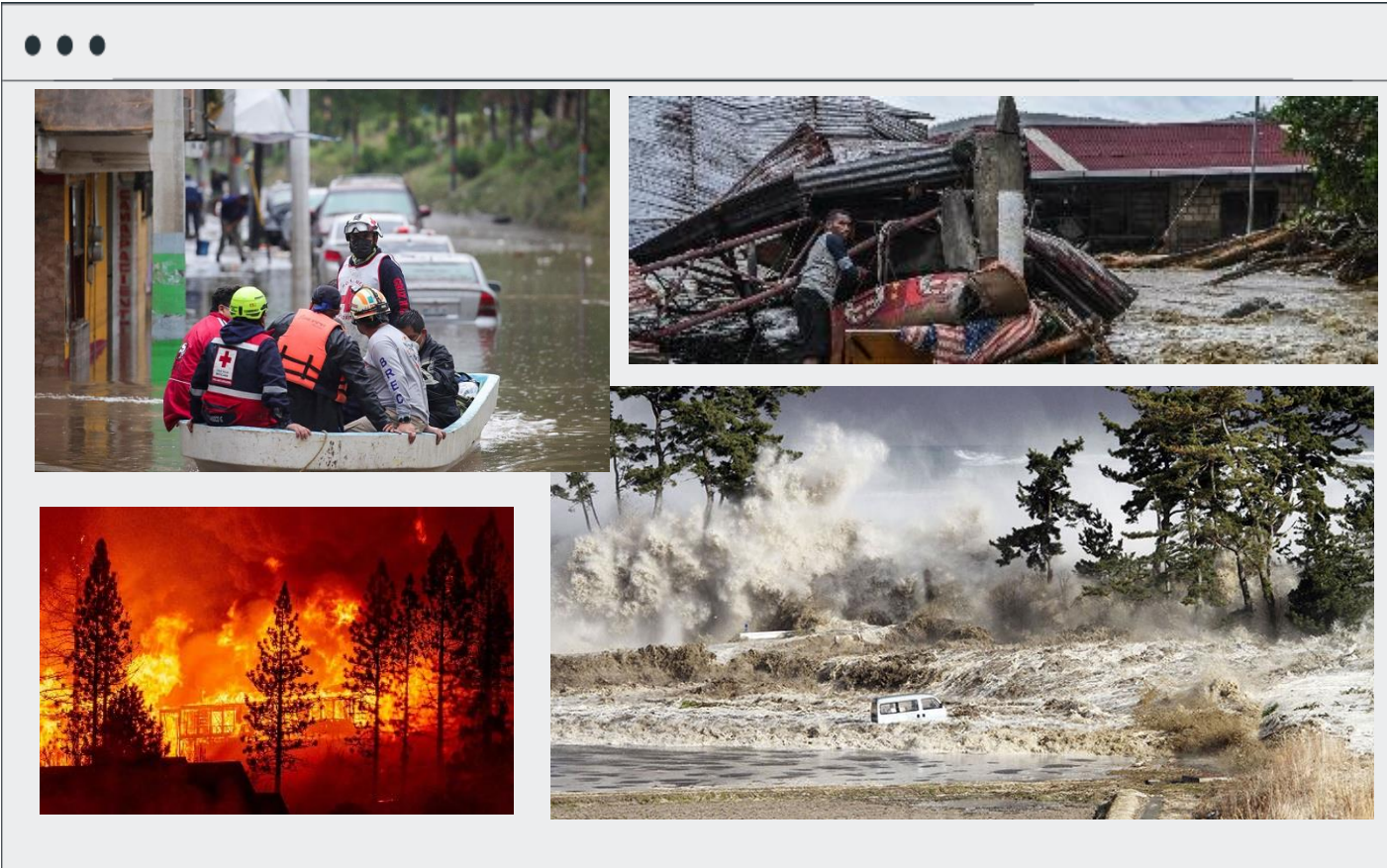
A photograph of a busy city street, likely in New York City, showing pedestrians in winter clothing walking past tall buildings. A large puddle in the foreground reflects the scene, including the people and buildings. The sky is overcast.

...

- **believe business is acting too slowly to avoid massive harm from global warming**
- **are willing to travel much less in future to help reduce climate change**

The growing concerns toward climate change, an opportunity for brands to invest in sustainability to combat climate change 'in time'

Q: If businesses in my country do not act now to combat climate change they will be failing their employees and customers



71%

of **Thais** agree that if businesses do not act now to combat climate change, they will be failing their employees and customers



ROADMAP TO NETZERO



Q&A

Moderated by
Viraj Juthani



Kiranjit Singh
Head of Strategy3



Ngan Ly
Managing Director- Vietnam



Usana Chantarklum
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GAME CHANGERS



BE SURE. GO FURTHER.

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