A DISRUPTED YEAR IN PERSPECTIVE

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Sources:

LIVING IN CRISIS MASKED UP AND MOVING FORWARD IN SE Asia

Tracking the evolving opinions and behavior around COVID-19 in Southeast Asia Wave 2 : Survey Period 18 – 22 Sep 2020

September 2020

GAME CHANGERS Ipsos

Global Trends 2020 Beyond the pandemic

2019 = 33 countries November 2020 = six countries

GLOBAL ATTITUDES ON A COVID-19 VACCINE

October 2020

GAME CHANGERS Ipsos

WHAT WORRIES THE WORLD

20,000 surveys in 27 countries

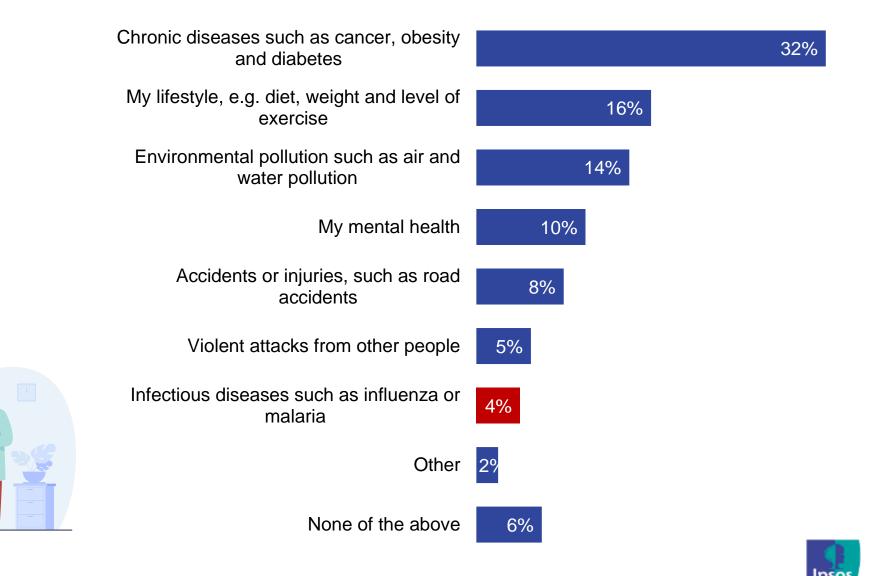
November 2020

GAME CHANGERS Ipsos



No One Saw it Coming

What people most saw as a threat to health in 2019



Now (Nov 2020) it is the largest worry globally!

Q Which three of the following topics do you find the most worrying in your country?

Mentioned in November 2020 (%)

Coronavirus (COVID-19)	\triangle			47%
Unemployment			389	%
Poverty & social inequality	X		29%	
Financial/political corruption	{\$)		27%	
Crime & violence	<u>jo</u> ţ		26%	
Healthcare	Q		23%	
Education	\bigcirc	16%		
Taxes	₿	13%		
Climate change		11%		
Immigration control	Ð	10%		
Moral decline	÷	10%		
Rise of extremism		9%		
Terrorism	Â	9%		
Inflation	<u>i</u>	9%		
Threats against the environment	Ø	8%		
Maintaining social programmes	-	6%		
Access to credit	ß	2%		
Childhood obesity	8	*		

Base: Representative sample of 20,006 adults aged 16-74 in 27 participating countries, October 23rd 2020 - November 6th 2020. Source: Global Advisor



Coronavirus: how the pant This Deloi has changed our perceptic 3 days ago

of time

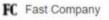
May 28, 2020 12,54pm BS1

How we exercise is different now – the pandemic changed everything

App-based studies have shown older people have been more active than before

② Fri, Oct 16, 2020, 06:01

Covid-19 has changed everything. Now we need a revolution for a born-again world **Simon Tisdall**



5 ways the pandemic has changed staff development forever

This Deloitte exec says the evolution is a net positive. 5 ways the pandemic has changed professional and staff development forever. [Photo: ... 3 days ago

World Economic Forum

3 ways the COVID-19 pandemic has changed youth activism



The COVID-19 pandemic has made us all more reliant on digital tools for connection and communication;; Dealing with COVID-19 restrictions ...

Everything

America 2.0: Ready or not, here it comes. Five cognitive strategies can help.

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IS | UNKNOWN QUESTIONS

of work may change forever





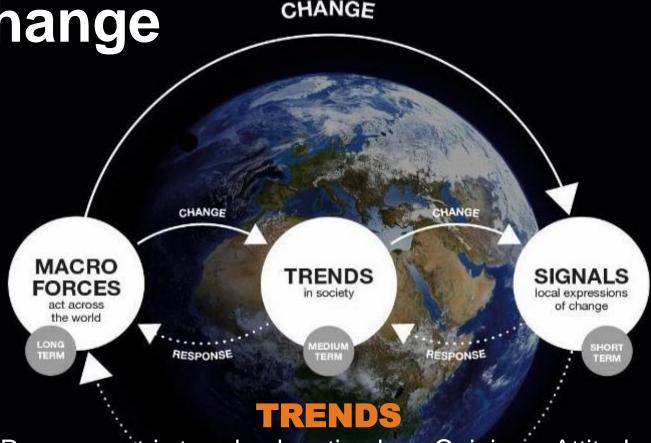
Judging by the news, you may feel everyone is like this



First, let's look at a framework to assess change

MACRO FORCES

Affect the whole world, and have a high likelihood of happening. They are deep currents with long term and far reaching impacts and tend to drive human systems.



Person-centric trends, denoting how Opinions, Attitudes & Values of citizens and consumers are changing over time in response to macro forces & early signals.

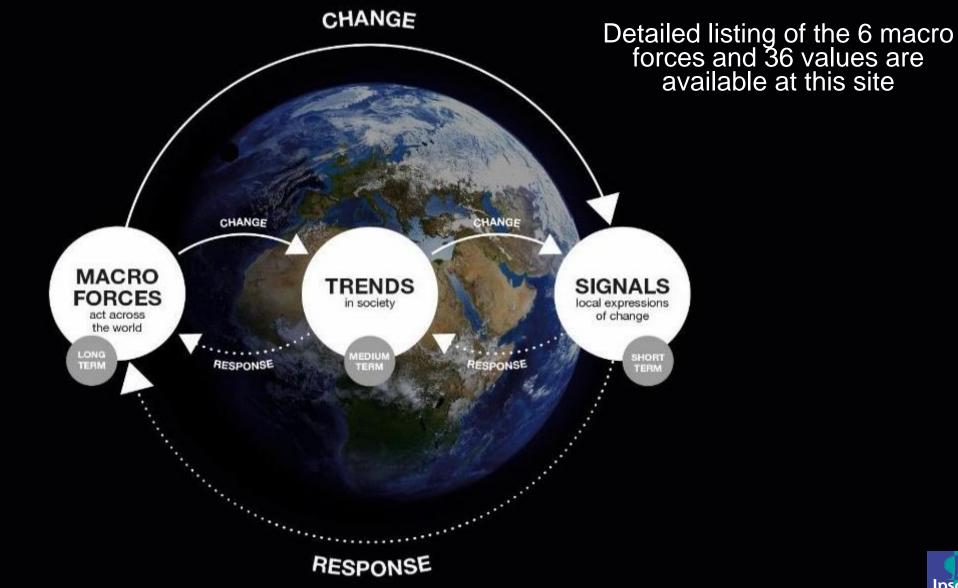
RESPONSE

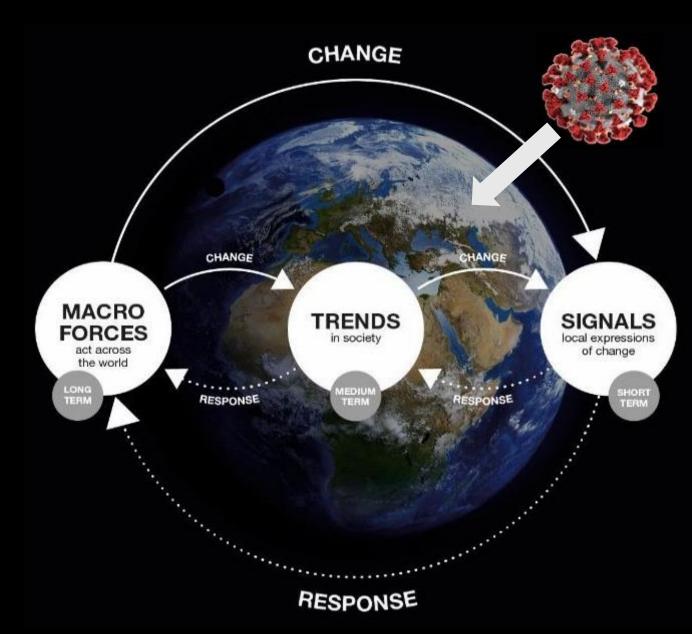
SIGNALS

Visible real world examples of the responses to the forces and pressures; how these are adopted and adapted - what people & organisations are doing, being, looking at, listening to, choosing, avoiding, experiencing, believing...they can be BIG or small.



https://www.ipsosglobaltrends.com/





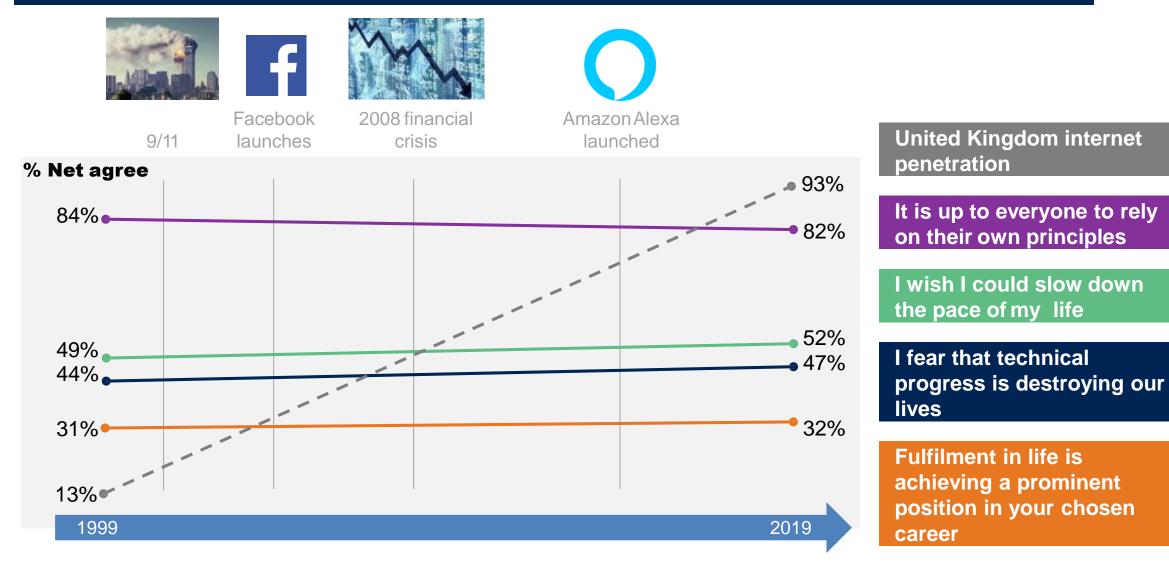
A 'shock' to the eco-system!

Covid-19 has produced a tsunami of new signals that are impacting life now and may result in impending change to our future societies.



Even with a shock like COVID-19, it still takes much longer to shift underlying trends and macro forces before a 'new normal' is created.

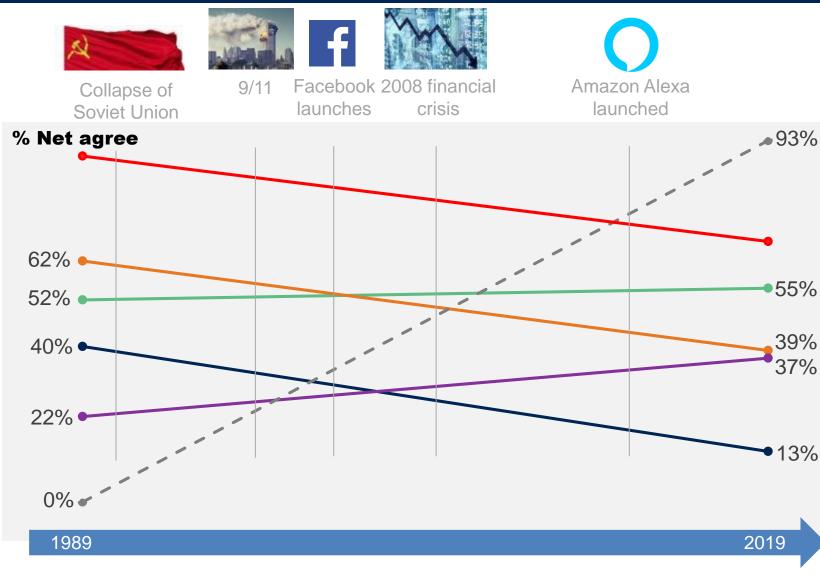
Values Can Hold True Over the Medium Term





Sources: 1999: Ipsos Socioconsult Survey, 2019: Ipsos Global Trends survey – GB data, United Kingdom Internet penetration, Office for National Statistics (UK)

While Some Changes are Gradual Over Time



United Kingdom internet penetration

Using hard drugs like heroin is morally wrong

It is wrong to have sex with someone who is married to someone else

The use of soft drugs such as cannabis is morally wrong

Capital punishment is morally wrong

Homosexual relationships between consenting adults are morally wrong

Sources: 1989: MORI "We British survey" 2019: Ipsos Global Trends survey – GB data, United Kingdom Internet penetration, Office for National Statistics (UK)



Besides Cultural Norms, the Stage of the Covid Pandemic also Matters

• The pandemic not reached m area and so fa there are no restrictions	у	I am reacting da by day to new restrictions and establishing ner routines		I see signs that things are improving and that some restrictions will soon be loosened						
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6					
	I am getting rea for new restrict preparing and stockpiling sup where needed	ions	I have adapted the restrictions and have settle into new routin	I feel the pandemic is behind me and am moving on with my life						



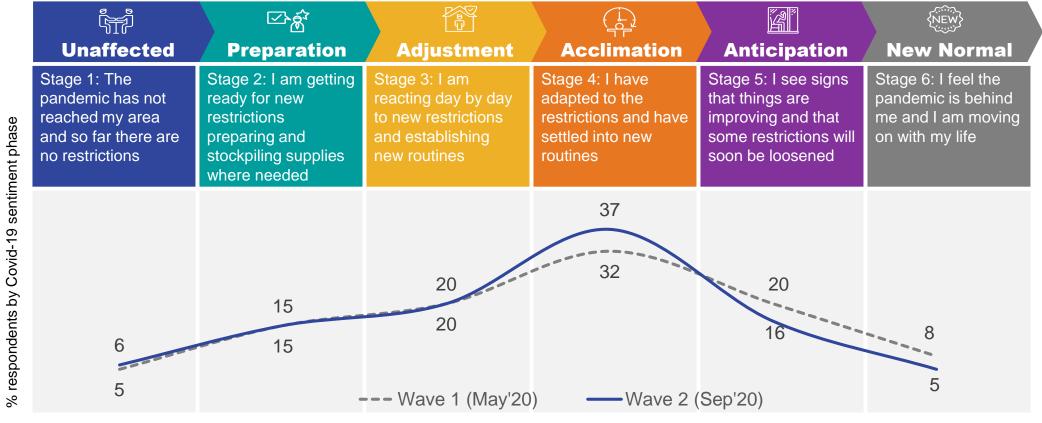
IN SE Asia, Most Feel They are in an Acclimation Stage.



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

South East Asia (All countries)

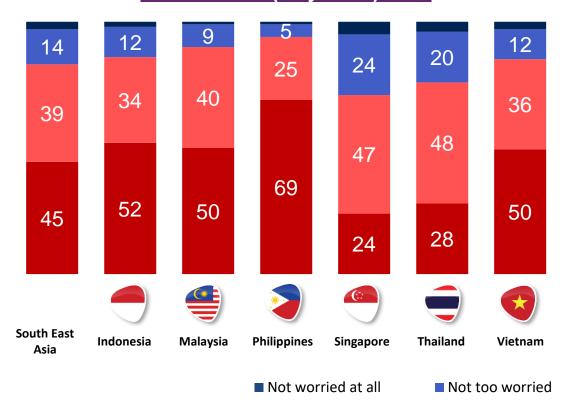
% respondents by Covid-19 sentiment phase



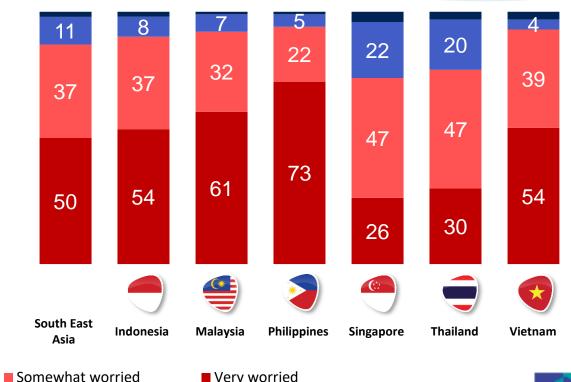
People are Still Concerned ABOUT Contracting Covid-19

Are you worried about contracting Covid-19?

Wave 1 (May 2020)



Wave 2 (Sep 2020)



Verv worried



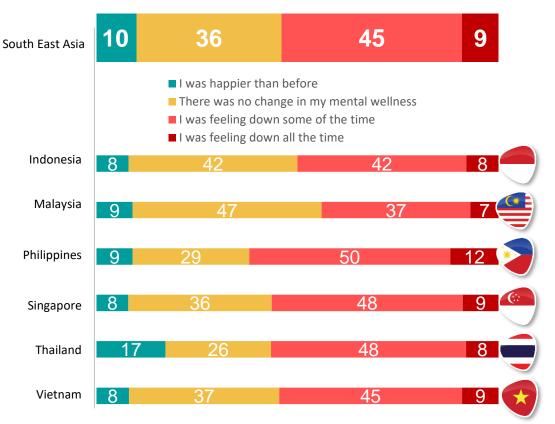
Staying at Home has Impacted Both Physical and Mental Well Being

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

20 31 39 11 South East Asia I had a higher physical activity level than before There was no change in my physical activity level I had a lower physical activity level than usual ■ I had no physical activities while staying at home Indonesia 22 2Λ 35 8 Malaysia 16 27 **4**7 Philippines 24 12 23 41 42 13 15 Singapore 20 34 31 16 Thailand 35 Vietnam 21 8

Physical activity

Mental wellness



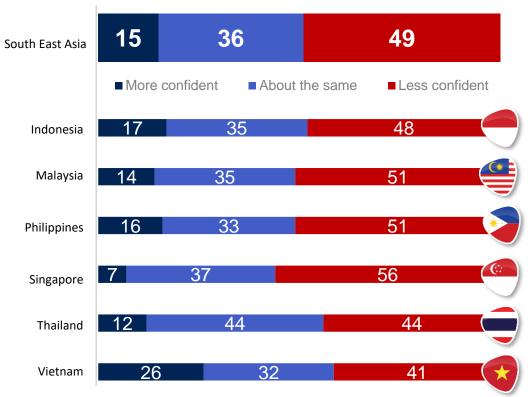


Less Confident of Making any Big-ticket Purchase

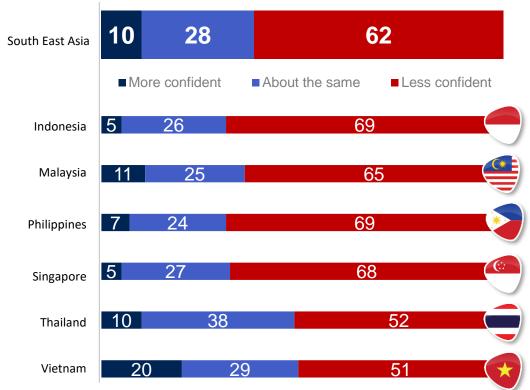
Compared to about 3 months ago, after Covid had become widespread, are you NOW more or less comfortable with ...



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



Making a major purchase, like a home or car



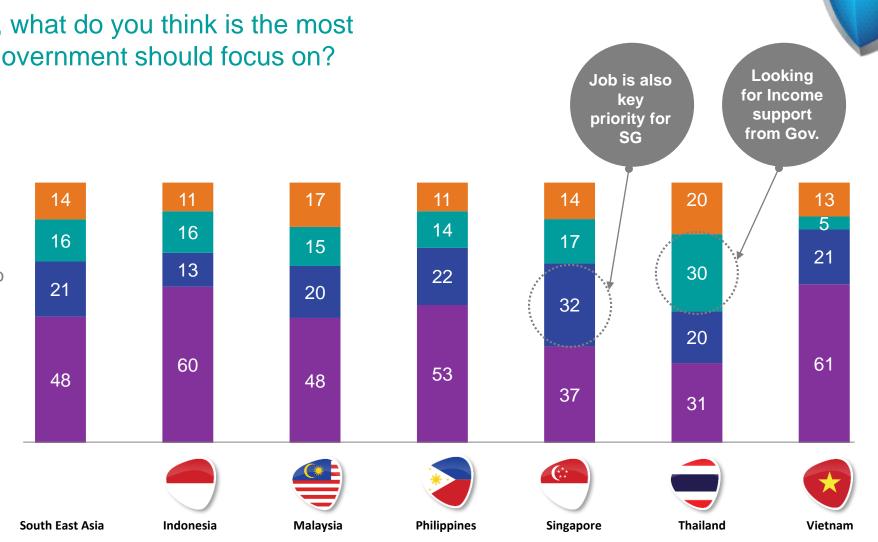
Protection from Covid-19 STILL is Top Priority Expected from Government Across Markets

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

Control prices of goods

- Provide cash assistance to households
- Protecting jobs

Keep everyone safe from Covid-19





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?

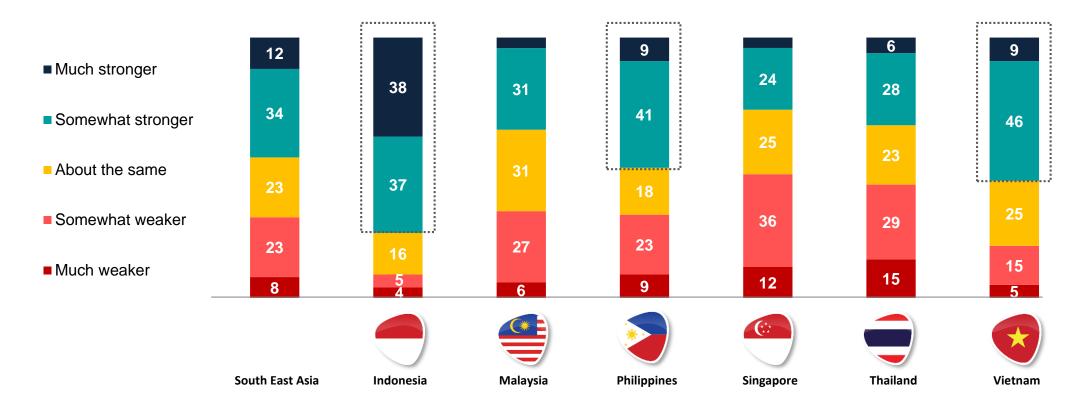
South East Asia (All countries) About the same Less ■ I never engage in this More **NET (More-Less)** +57% Spending time with family 63 Spending time on social media +45% Buying items online +43% 56 Using cashless payment +42% 51 Streaming content (Netflix etc) +29%Reading books or magazines +13% 29 Working/studying +11% Exploring new hobbies +6% Working out/doing sports -6% Smoking or using tobacco products -9% Drinking alcohol -25% Socializing with non-family members 55 -43%



Yet, Many Remain Optimistic about the Future

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







Lets Look at Countries Around the World

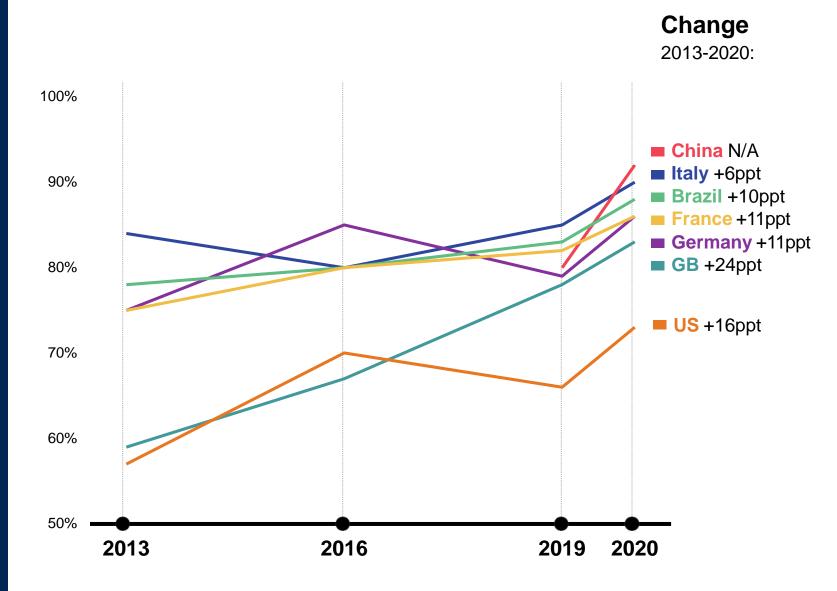
COVID-19 has not Dented Climate Concern

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

% agree

22 - © lpsos





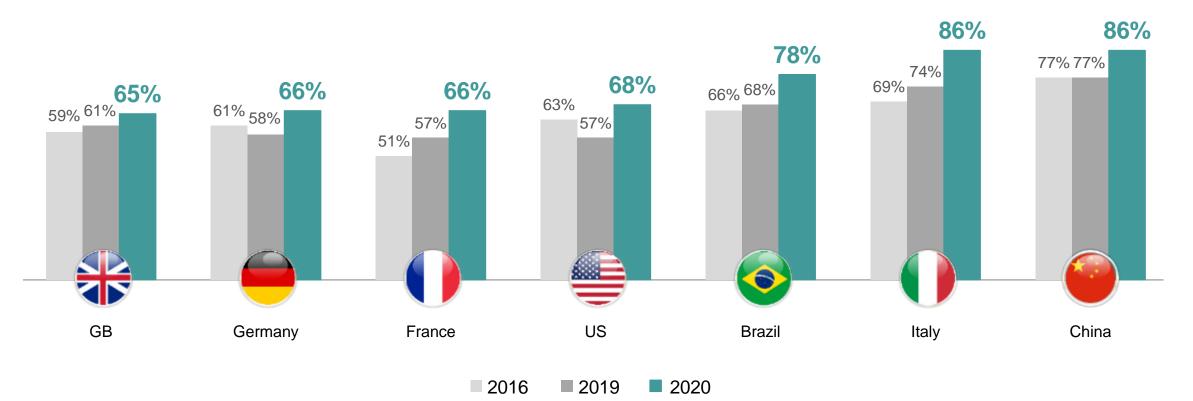
Ipsos Global Trends Series Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave



Health has Moved Up the Agenda for Consumers

"I will sacrifice convenience if it means getting healthier products" - % agree





Base: 7,444 adults aged 16-75 (18-75 in US) in 7 markets interviewed in September 2020

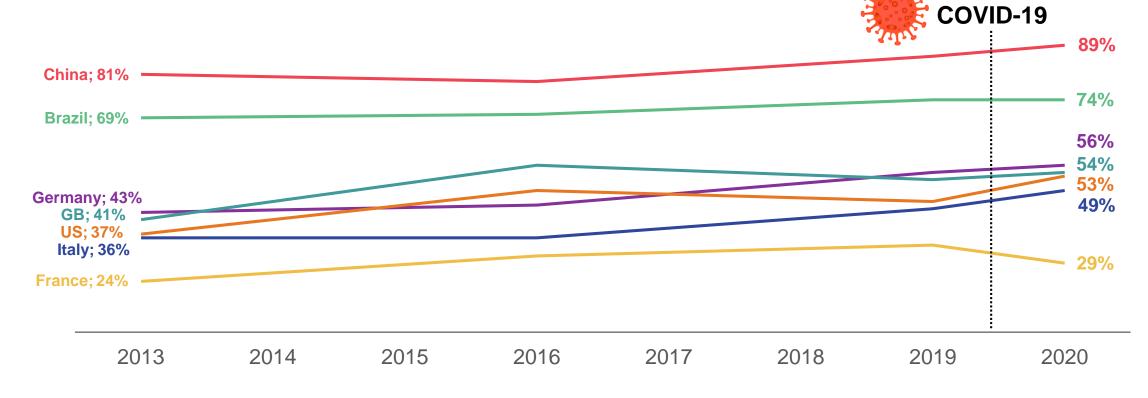


24 – © Ipsos

Ipsos Global Trends Series Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

Globalisation is not Seen as THE Problem

"Globalisation is good for my country" - % agree





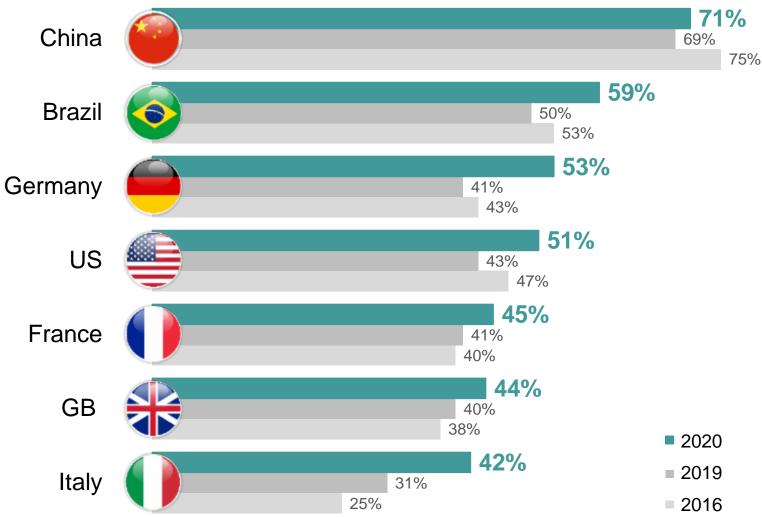


Brands have Gained in Importance

"I am generally willing to spend extra for a brand with an image that appeals to me"

% agree





Ipsos Global Trends Series

Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave



But are Looking Closer to Home

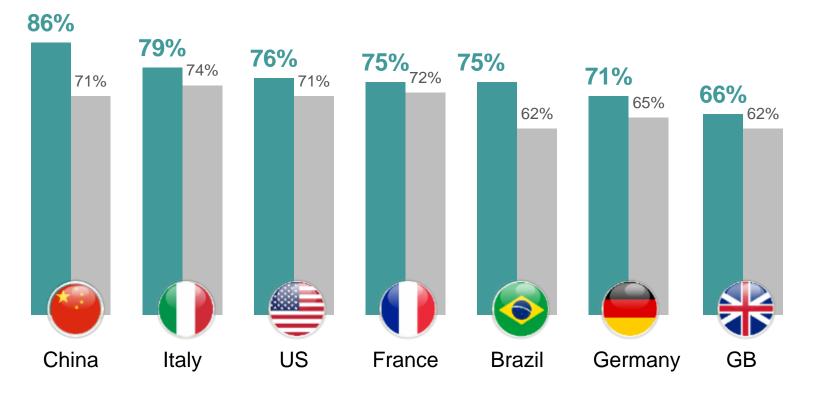
"I prefer to buy products from my country rather than products from abroad"

% agree

Resilience

Shorter supply chains Retreat to known and familiar





2020 2019

Ipsos Global Trends Series

Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave



Big Shift to Local in China

"I think global brands make better products than brands that are just local to my country"

% agree



27 - © Ipsos

Change since 2019 **59%** +5 Brazil 🚺 54% 34% -16 China 50% 32% +2 GB 30% 29% US 🙆 +2 27% 27% Germany +6 21% 24% Italy -5 29% 20% France +1 19% 2020 2019

Ipsos Global Trends Series

Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave



With Vaccines (almost) Available, does that Change Things?





Faith in Vaccines Varies a Lot Across Countries

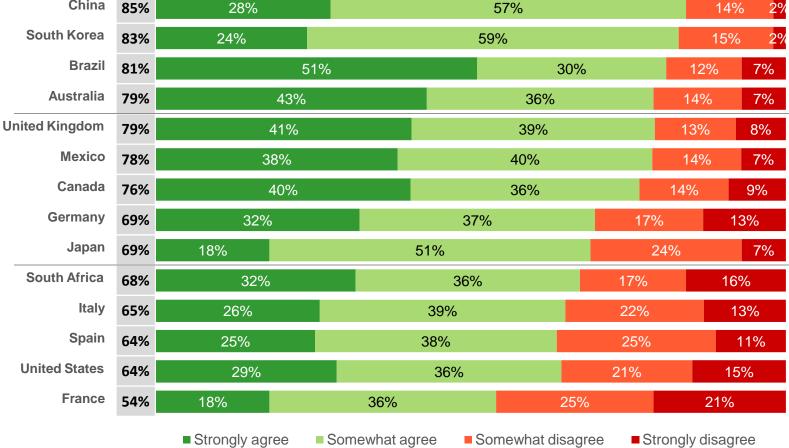
If a vaccine for Covid-19 were available, I would get it

Total Agree 73% 33% 87% 54% 85% 28% 83% 24% 81% 51%

Total

India

China



40%

57%

17%

34%

10%

5%

8%

Base: 18,526 online adults aged 16-74 across 15 countries

* Online samples in Brazil, China, India, Mexico, and South Africa tend to be more urban, educated, and/or affluent than the general population





Side Effects and Concern About the Speedy Development Of Vaccine, Among Those Who are Not Ready to Take It

Which best describes why you would not take A vaccine For covid-19? (Base: would not get a vaccine if available)

Total	34%	33%				10%		8%	1	0%	4%	
Japan		62%					13%		13%	4	<mark>%</mark> 5	% 3%
China	46%				20%		9%		2	0%		4%1%
Spain	36%				48	3%				6%	5%	<mark>3%</mark> 2%
South Korea	35%				39%				9%	10%	, o	<mark>3%</mark> 3%
Mexico	35%		38%					8%	69	6	10%	3%
India	34%		16% 14%				14%			19%		2%
Italy	33%		37%				8	%	7%	12	%	4%
France	32%		35%				12%		6%	13%		2%
Germany	30%		33%				15%		9%	1	0%	4%
Australia	30%		29%			7%		19%		9%	6 0	6%
South Africa	30%		23%		8%	10	10%		21%			8%
United Kingdom	29%		349	6				11%		10%		8%
Brazil	27%		48%					7%		7%	6%	6 3%
Canada	27%		32%			1	14%		6% 1			7%
United States	24%		38%				11%	9%	6	12%		6%

I am worried about the side effects

I am worried that a vaccine is moving through clinical trials too fast

I don't think it will be effective

The risk to me of getting COVID- 19 is low

I am against vaccines in general2

Other

Base: 4,859 online adults aged 16-74 across 15 countries who disagree somewhat or strongly that "if a vaccine for COVID-19 were available, I would get it"

* Online samples in Brazil, China, India, Mexico, and South Africa tend to be more urban, educated, and/or affluent than the general population



What does it mean for 2021?

In Conclusion...

Pandemic has NOT changed everything... Massive behavioural changes not attitudinal ones.

While there are present-day concerns, people are inherently optimistic about the future. As long as a sizable number have concerns with the vaccines, the pandemic may last for a while.

Still less than a year into this...stay adaptive!



THANK YOU

Related thought papers (for free) available at https://www.ipsos.com/en/news-and-polls/overview



