

LIVING IN CRISIS



**Evolving opinions and behavior in Southeast Asia
through the COVID-19 pandemic**

Wave 3 Topline Report

Conducted 4th – 15th February 2021

11 May, 2021

GAME CHANGERS



Ipsos COVID-19 Tracker

3000 adults in SEA / Wave



6 markets

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

3 Waves:

- *May 2020*
- *Sept 2020*
- ***Feb 2021***



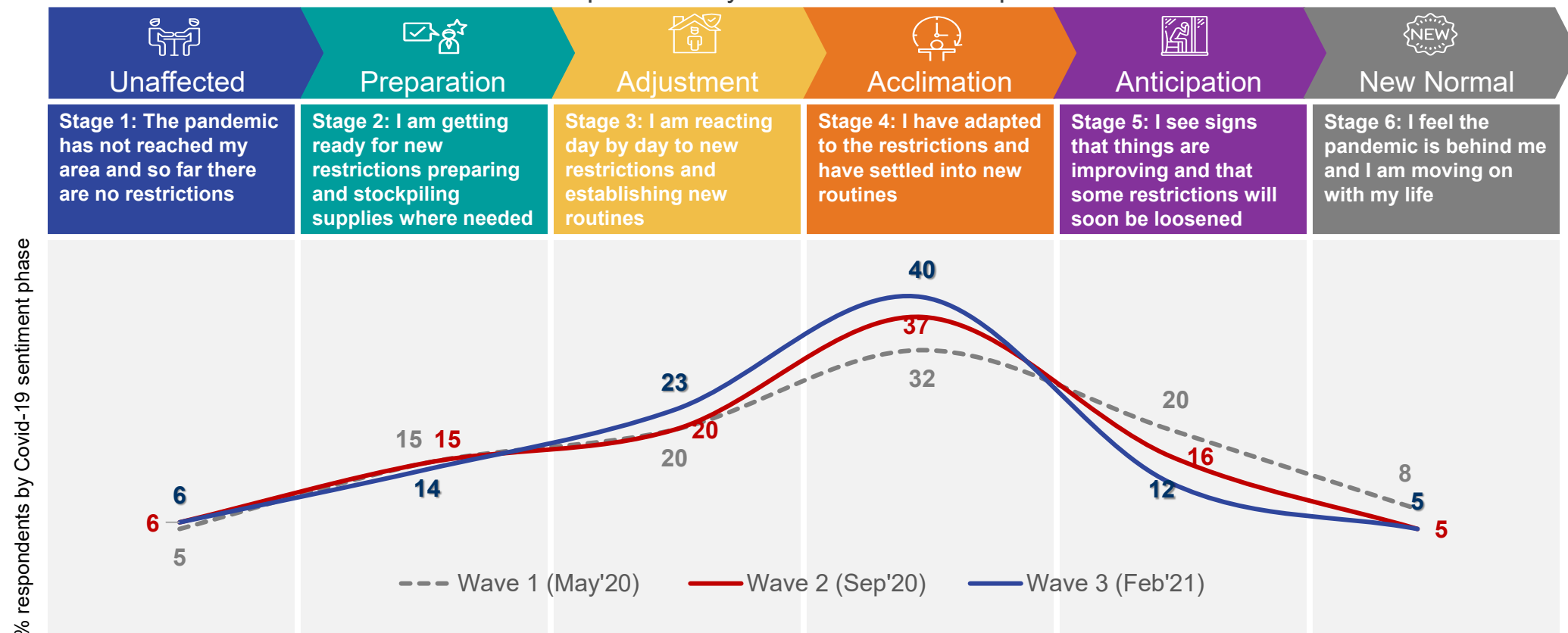
COVID IMPACT ON ME...

NEW ROUNDS OF LOCKDOWNS AND SECOND WAVES HAS AN UNSETTLING EFFECT ON CITIZENS

Q: 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





HOW DO I FEEL ABOUT THE FUTURE ...

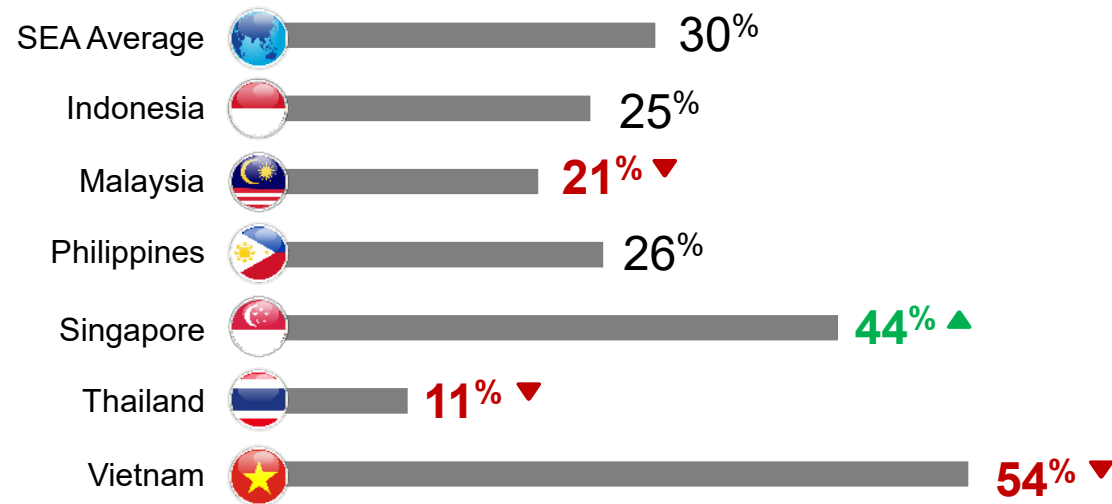
A YEAR OF LIVING WITH COVID-19, CITIZENS IN SEA CONTINUE TO BATTLE THE CONCERN ON THE OVERALL ECONOMY AS WELL AS FUTURE ECONOMIC OUTLOOK

Q: How would you describe the current economic situation in your country?

Q: Looking ahead six months from now, do you expect the economy in your country to be ... ?

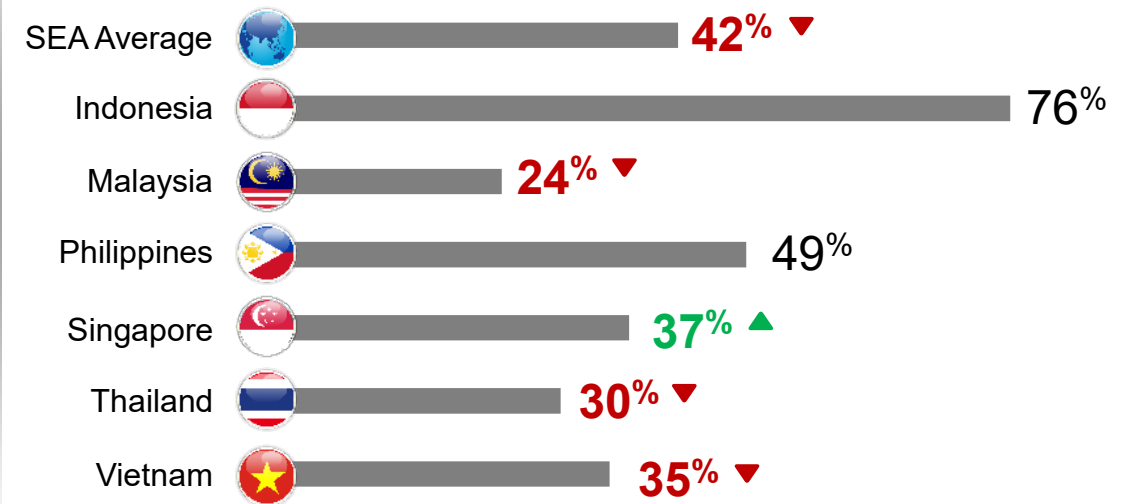
Current Economic situation in your country

(% saying 'good')



Economy in your country in next 6 months

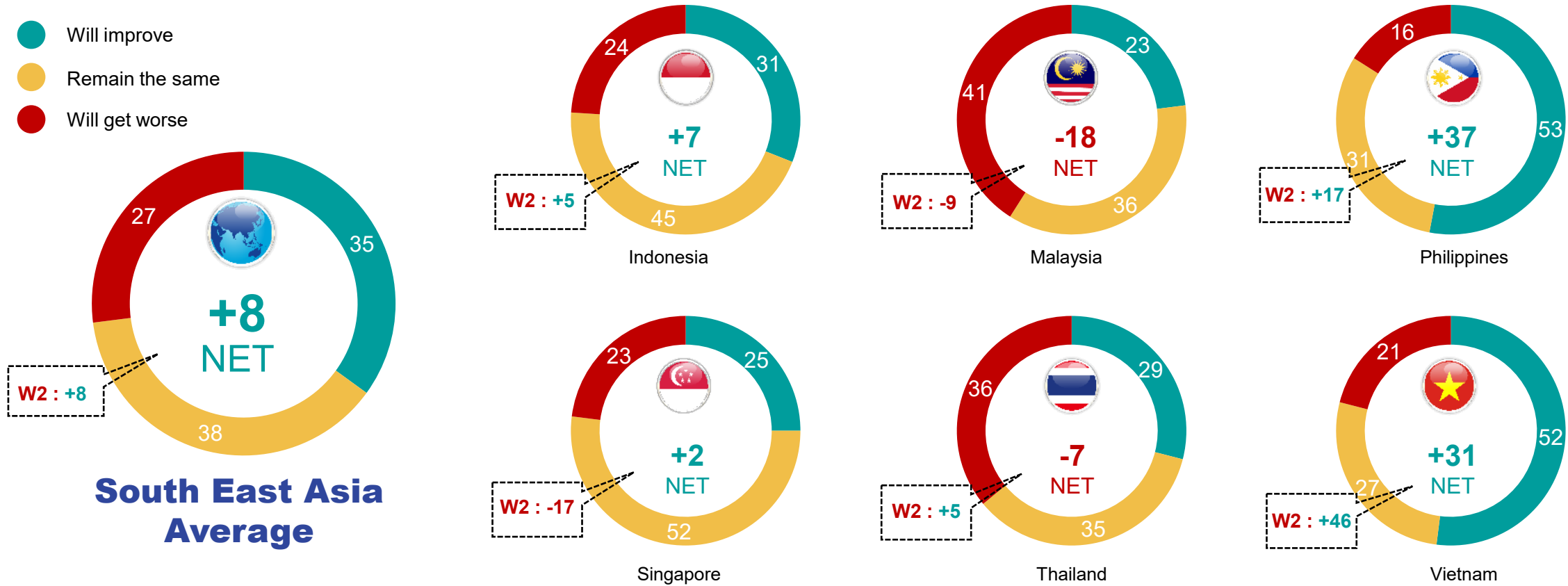
(% saying 'will be stronger')



▲ Improve v/s Wave 2 (Sept 2020)
▼ Decline v/s Wave 2 (Sept 2020)

MOST COUNTRIES ARE OPTIMISTIC ABOUT INCOME RECOVERY SOON, EXCEPT FOR MALAYSIA AND THAILAND WHERE INCOME STABILITY SENTIMENT HAS DECLINED RECENTLY

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

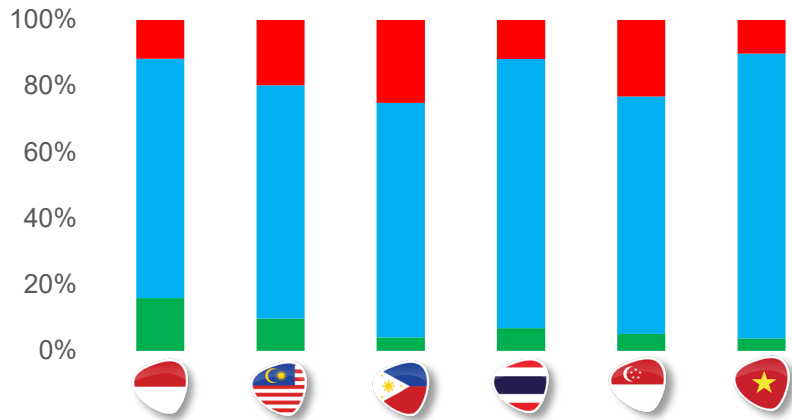
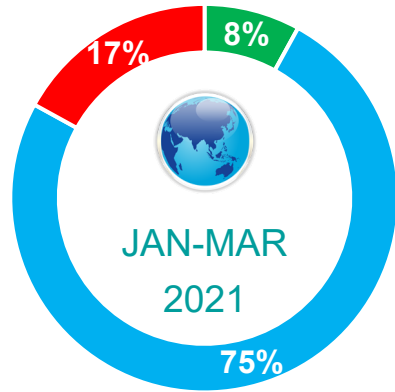


A close-up photograph of a person's hands writing on a document. The person is wearing a light blue button-down shirt. They are holding a silver and black pen in their right hand, writing on a white sheet of paper. Their left hand is resting on the paper. The background is blurred. A dark blue horizontal band is overlaid across the middle of the image, containing white text.

WHAT SHOULD THE GOVERNMENT DO ...

WHILE VACCINE IS ON THE HORIZON, WE SEE A GROWING HESITATION ON SIDE EFFECTS OF VACCINE SHOTS ON SOCIAL MEDIA

South East Asia Average



VIRUS DON'T REFUSE
SIDE EFFECTS
STOP FEVER SYMPTOM DIE
DEATHS SEIZURES KILL WAIT

SAFE EFFECTIVE GOOD BELIEVE
FREE BENEFITS IMPORTANT
PROTECT HEALTHY HELP HOPE

FIRST DOSES VACCINES
RECEIVED TESTED GOVERNMENT
VACCINATED LAUNCH APPROVED

With influence of speculative news and claims, online citizens are getting wary about the side effects and reluctant

- Twenty-one serious side effects after vaccinations against COVID-19 have been so far reported, the Department of Health said Friday.
- Lock em down & shoot em up with your EXPERIMENTAL VACCINE! Better be quick b4 more & more stories leak about the side effects happening NOW!
- There are a lot of under-reported debilitating side effects as well as the deaths.. palsy, tremors, seizures and MS like symptoms.

Part of the online publics remain optimistic towards the efficacy of vaccines

For my family, friends and myself, it is a shot of hope. Got my 1st shot of Covid19 Vaccine. Thank you

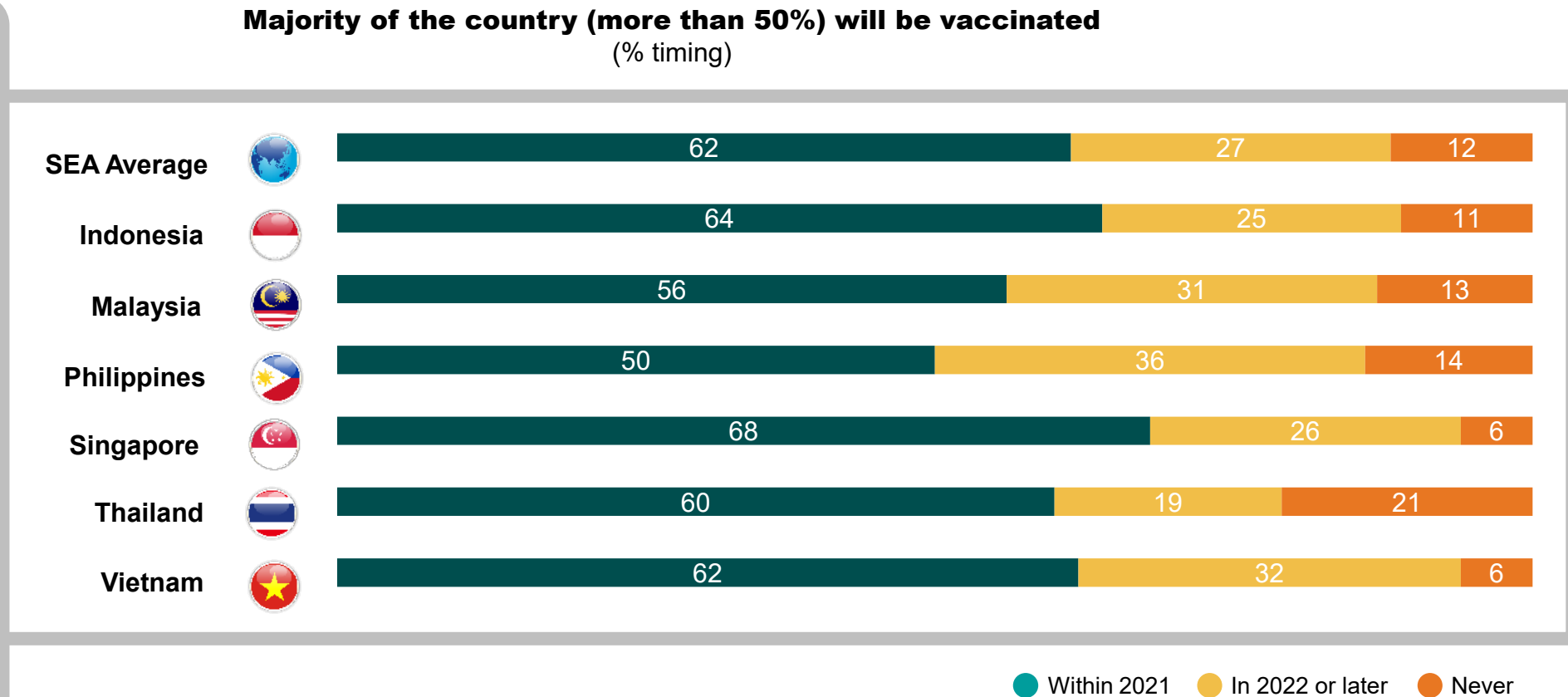
Online news media plays a crucial role in disseminating latest and true updates on vaccine development and results

Canada says AstraZeneca Covid-19 vaccine is safe after Norway and Denmark suspend use

Social Media Sentiment ● Positive ● Neutral ● Negative

EFFICIENT ROLL OUT OF VACCINATION CAN BUILD ECONOMIC OPTIMISM AS IN THE CASE OF SINGAPORE. PHILIPPINES, MALAYSIA, AND THAILAND NEEDS MORE CONFIDENT BUILDING MEASURES.

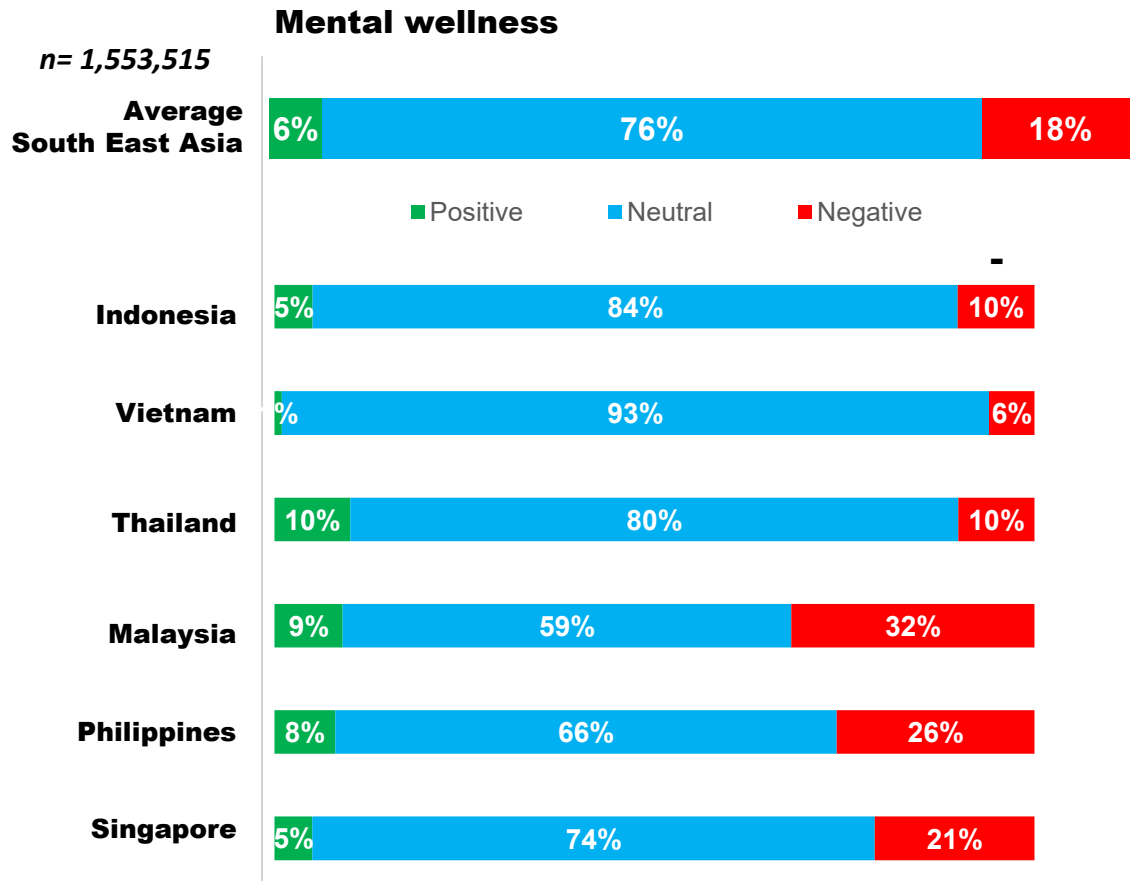
Q: When do you believe a majority (i.e. more than 50%) of your country will have been vaccinated against COVID-19?





HOW AM I ADAPTING ...

COVID-19 PANDEMIC CONTINUES TO TAKE A TOLL ON THE MENTAL HEALTH OF MANY ONLINE CITIZENS ACROSS SEA COUNTRIES



DEPRESSION STRESSFUL CASES
 INCOME WORRIED JOBLESS
ANXIETY SAD SYMPTOMS
 SCARED RESURFACED DOWN
MISSED LOCKDOWNS FEAR
 LOSS INCOME UNPREDICTABLE

Disturbed by the fluctuating and alarming number of cases and reemergence of COVID-19 clusters

- There are new cases of Covid resurfaced in Manila and I feel that US and Japan might too @riho_gtmv-chan. Still, stay safe.
- COVID-19 infections continue to rise at a worrying rate, with more than half a million cases recorded worldwide in just the last week.
- Selangor not showing any indication that new infection numbers will slow down to single digits any time soon. With it's high population density, industries driven by foreign workers (in questionable living conditions) , it's a big challenge.

Movement and socializing restrictions, while struggling to cope with the new normal lifestyle creating anxiety and mental health issues

- MY DAD CAN'T GO HOME. HE GOT LOCKDOWN. ON MANILA. THAT'S FREAKINH SAD. I CAN'T EVEN GIVE HIM A WARM HUG. IM STILL MISSING MY DAD.
- I feel so bad for my toddler because he has been very vocal that he sometimes feel bored at home.
- I feel like I've been LOCKED UP TIGHT FOR A CENTURY of COVID nights Waiting for some vaccine to release me








The wavering economy and uncertainty of income and job opportunities are leading to high stress situations

- Job losses, bankruptcies, sickness and fear are just a few of the side-affects felt by the Covid-19 pandemic.
- i had a big depression thing last year losing my job to covid, when stuff was super unpredictable and scary in the beginning

ACROSS SEA PEOPLE ARE STILL CAUTIOUS ABOUT GOING TO PUBLIC GATHERING PLACES (E.G. GYM/ SPORTS FACILITY, TRAVEL, EVENT)

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

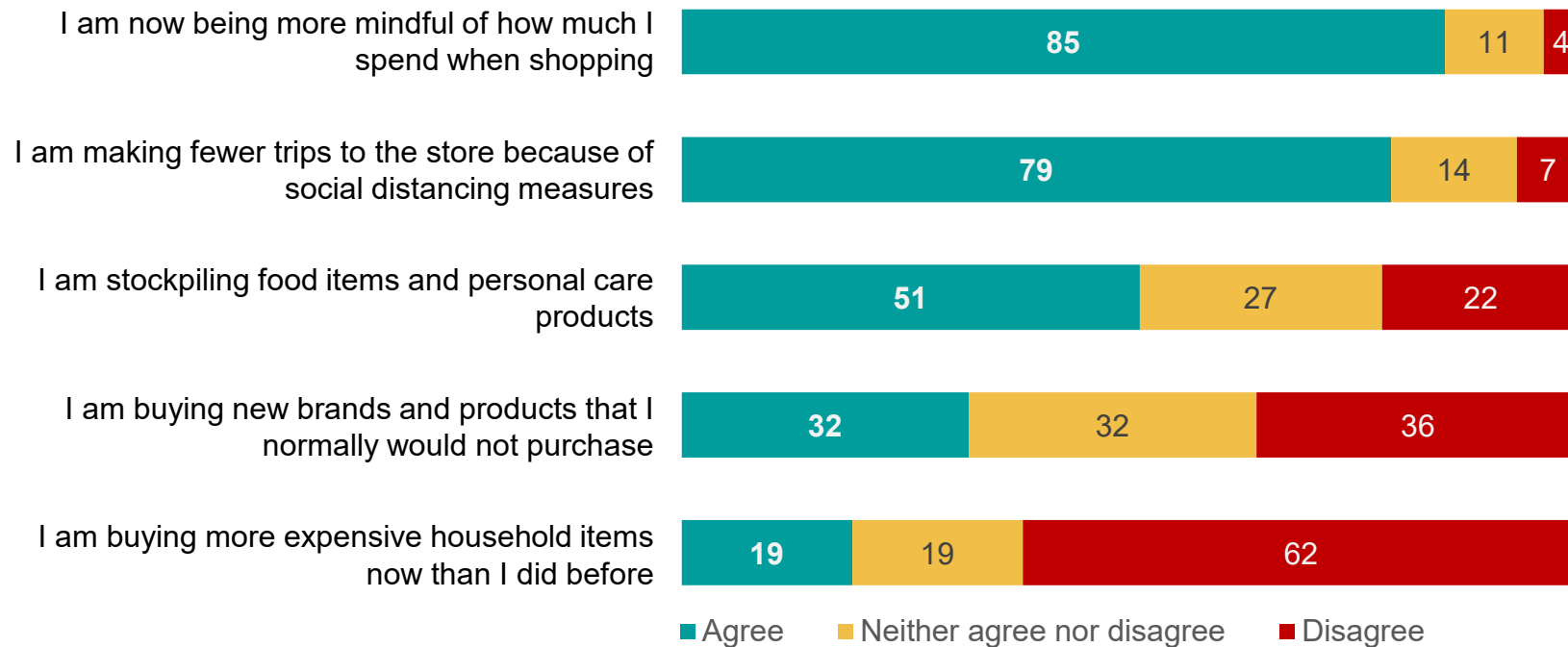
South East Asia (All countries)

	Immediately	March 2021	April-May 2021	June-July 2021	August 2021 or later
Visit friends or family in their homes 	36%	15%	16%	10%	24%
Use public transportation 	33%	18%	17%	12%	19%
Go to a restaurant 	28%	18%	18%	12%	25%
Go to a gym/sports facility 	21%	13%	16%	14%	37%
Travel domestically 	19%	9%	14%	15%	43%
Join a cultural event/gathering 	14%	12%	17%	16%	42%
Travel to another country 	9%	3%	6%	8%	74%

PEOPLE ARE STILL MINDFUL IN MAKING PURCHASES, NOT THE TIME TO TRY NEW THINGS NOR UPGRADING

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

South East Asia (All countries)



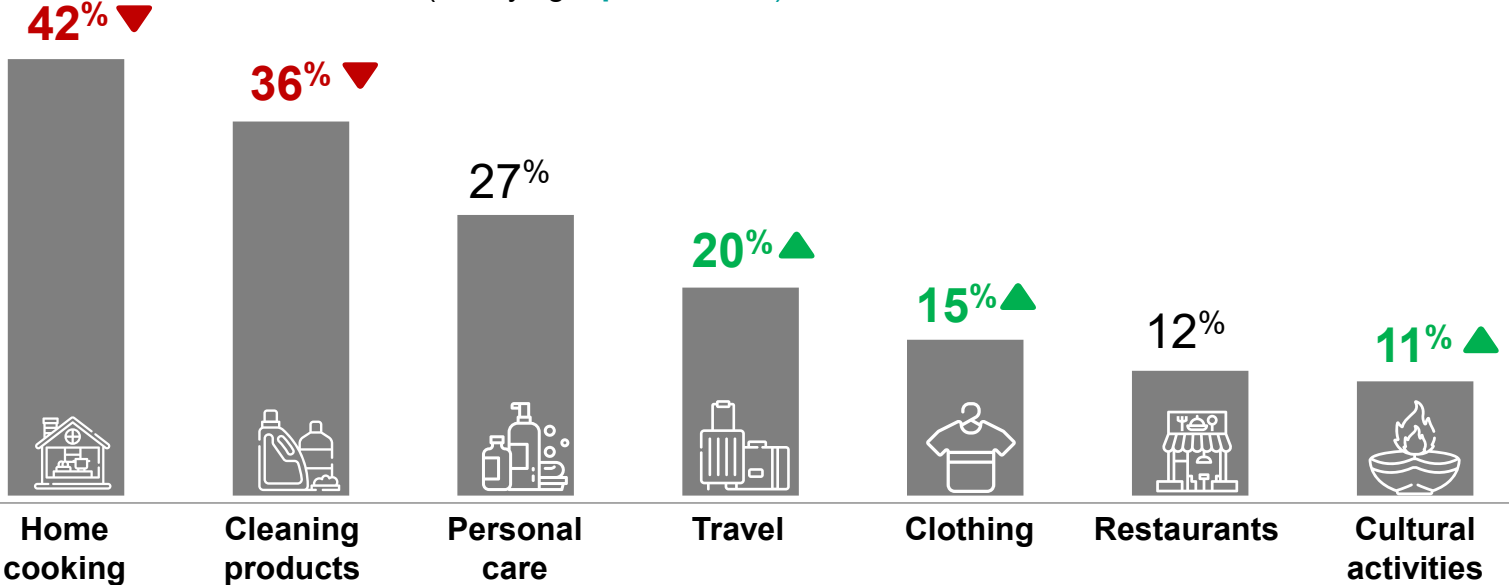
GETTING AWAY FROM ROUTINE AND 'SMALL INDULGENCES' TAKE PRECEDENCE

Q: When the period of movement restrictions is over, do you plan to spend more, less or the same amount of money these items/activities, as compared to before the COVID-19 crisis?



South East Asia Average

Activities where they plan to spend more when restrictions end
(% saying 'spend more')



▲ Improve v/s Wave 2 (Sept 2020)
▼ Decline v/s Wave 2 (Sept 2020)

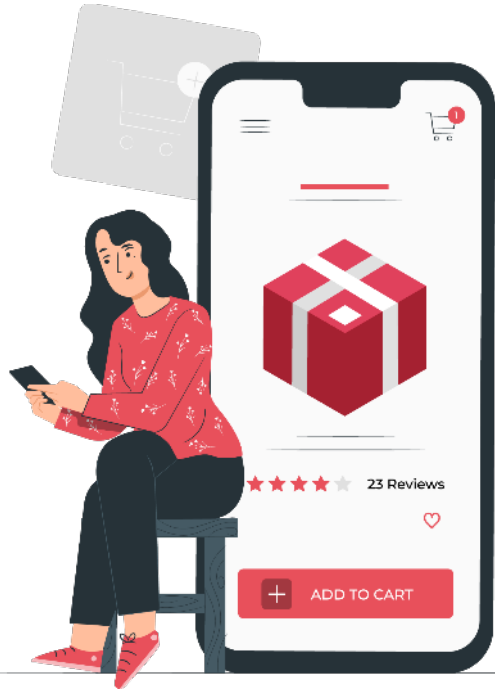
SHOPPING ONLINE AND CASHLESS FUTURE IS REAL ...

83%

Say they have shopped online in the last 1 year

57%

Report an increase in online shopping in the past year

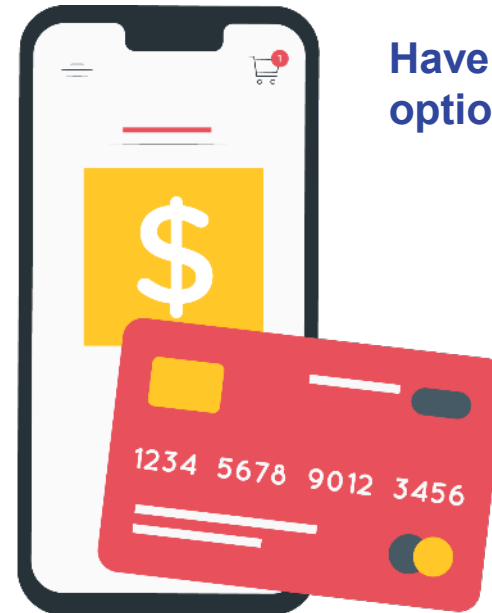


86%

Have used cashless payment options at physical store

54%

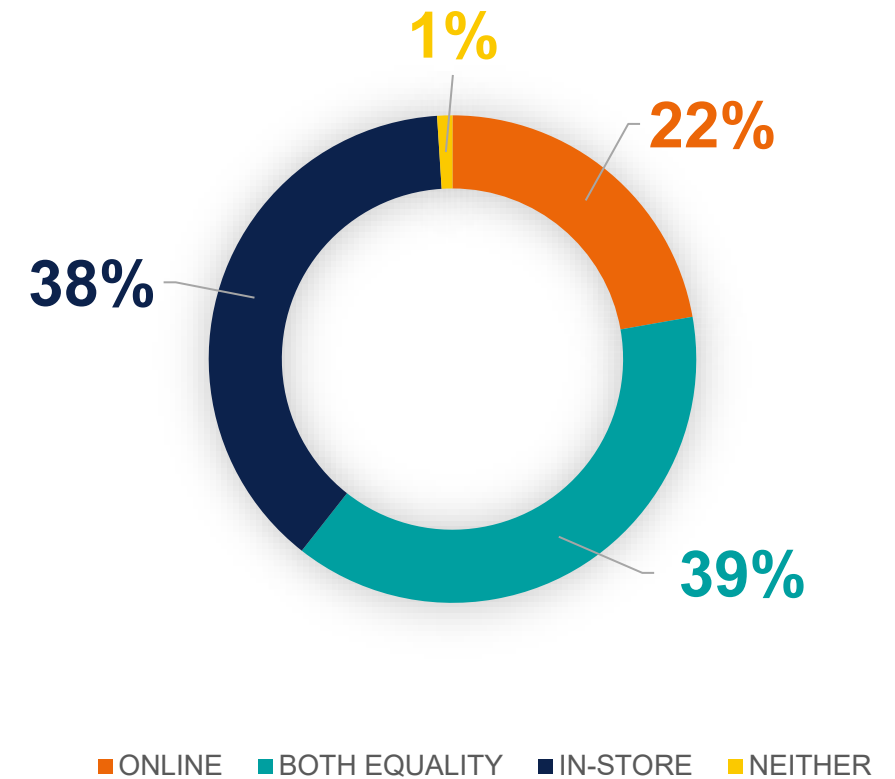
Say they are using more cashless payments than 1 year ago



IPSOS RESEARCH GLOBALLY INDICATES THAT ITS HERE TO STAY ..













GIVEN THE CHOICE BETWEEN ONLINE AND IN-STORE SHOPPING, IF BOTH PRESENTED ZERO RISK FOR COVID-19 ,WHICH WOULD YOU PREFER?



STRENGTH OF POST-PANDEMIC CONSUMER RECOVERY LIKELY TO VARY SIGNIFICANTLY

Western economies are forecasting a post-pandemic consumer boom, but the underlying drivers in the US and Europe may not be applicable in Southeast Asia:

Mileage may vary: comparison of Post-pandemic spending drivers

			
Stimulus to households			Developed economies have been more generous in direct cash handouts to households compared to SEA (with exception of Singapore)
Personal income and savings			Personal income has increased in the US due to stimulus checks, while savings have on average increased in EU – in contrast to most of SEA (this study).
Removing restrictions			Most of SEA have lifted restrictions earlier than the EU and large parts of the US – some of the spending boom may have already occurred .
Vaccination			The US and Europe have more established vaccination plans , and a full-return to normalcy will be sooner than most of SEA.

KEY TAKEAWAYS

- We are getting used to living with COVID but remain cautious
- Recovery and sentiment varies and is a function of the severity of recent surge in cases as well as the administration's response to containing the spread
- Big ticket spending shall remain muted , however there are indications that event induced spending and small indulgences provide an outlet to people to break away from the COVID induced routine
- Effective vaccine rollout and transparent communication is the key to boosting confidence as witnessed from countries such as Singapore which shows positive signs of economic and sentiment recovery



**BE
SURE.
GO
FURTHER.**

GAME CHANGERS



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GAME CHANGERS

