

# SEA AHEAD

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

Findings from study conducted in June 2021

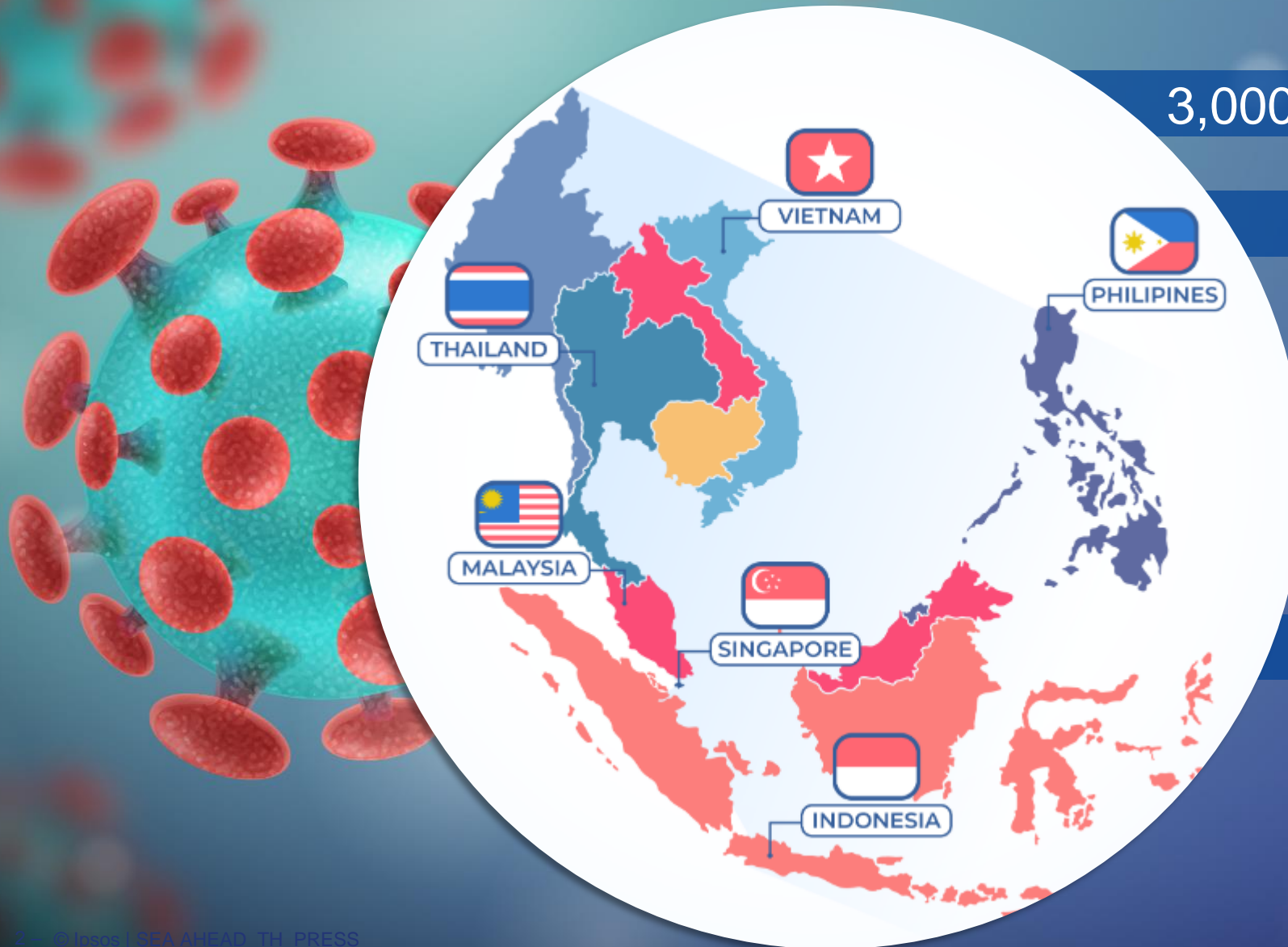


Usana Chantarklum  
Country Manager Thailand

GAME CHANGERS



# COVERGAGE IN SOUTHEAST ASIA COUNTRIES



3,000 adults in SEA / Wave

## 6 markets

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

## 4 Waves:

- May 2020
- Sept 2020
- Feb 2021
- June 2021





# 18 MONTHS INTO THE PANDEMIC, WHAT'S HAPPENING IN SOUTHEAST ASIA?





## Expectations of Citizens from their Governments and Businesses



## The Mental Ill-Health Pandemic



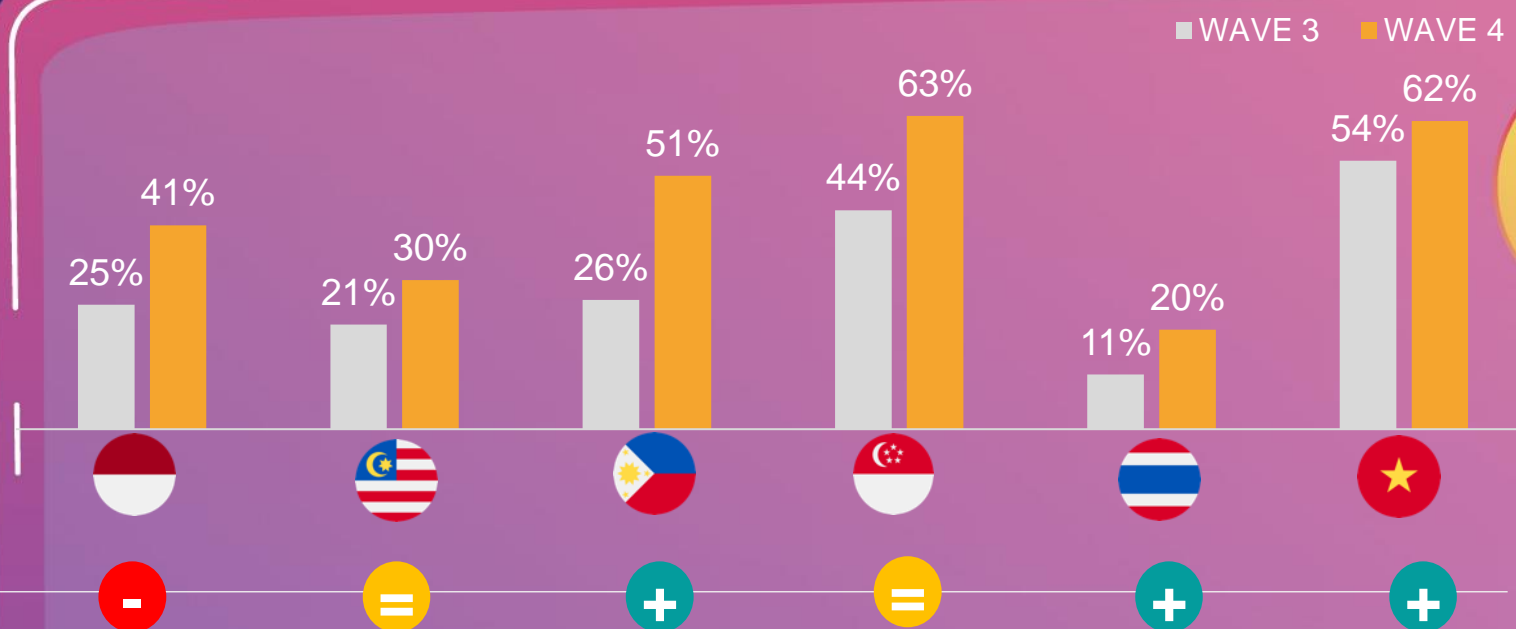
## Consumer Confidence & Behavior

# Expectations of Citizens from their Governments and Businesses



Across SEA, the sentiments are that the economic conditions have improved, but not all are equally optimistic about the future

% respondents saying that current economic conditions are good



Future Outlook

On the prospect of future lockdowns

- Least worried - Singapore
- Most worried - Thailand

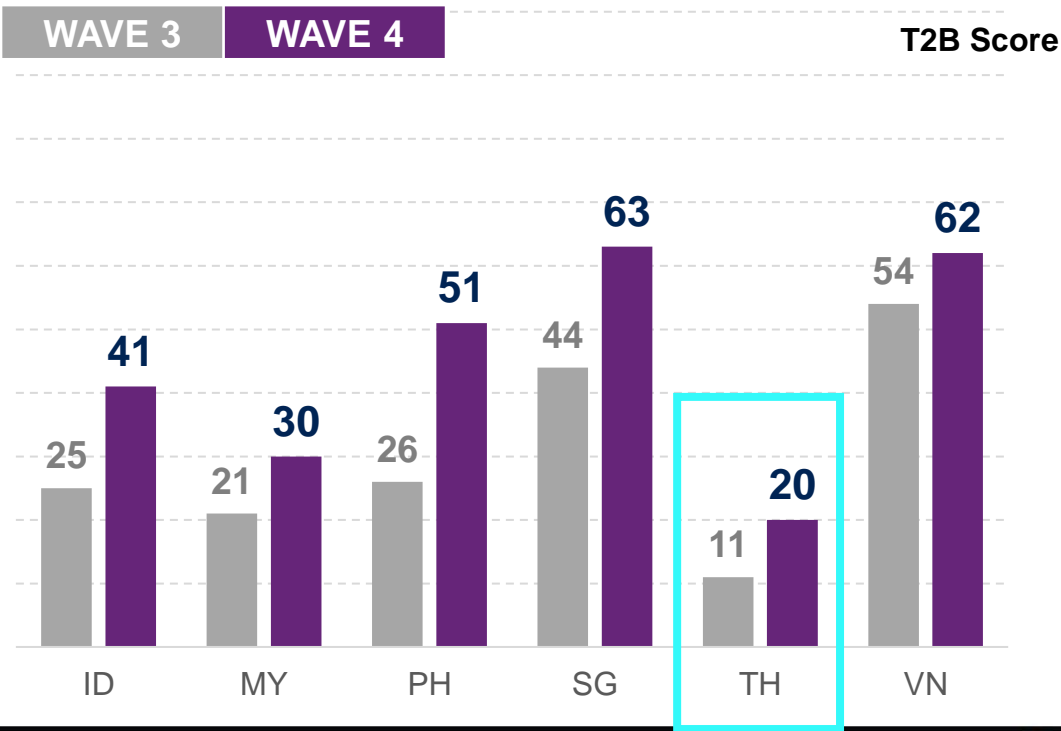
# While the Philippines and Vietnam are most confident about the future of their economies, other countries remain cautiously optimistic

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

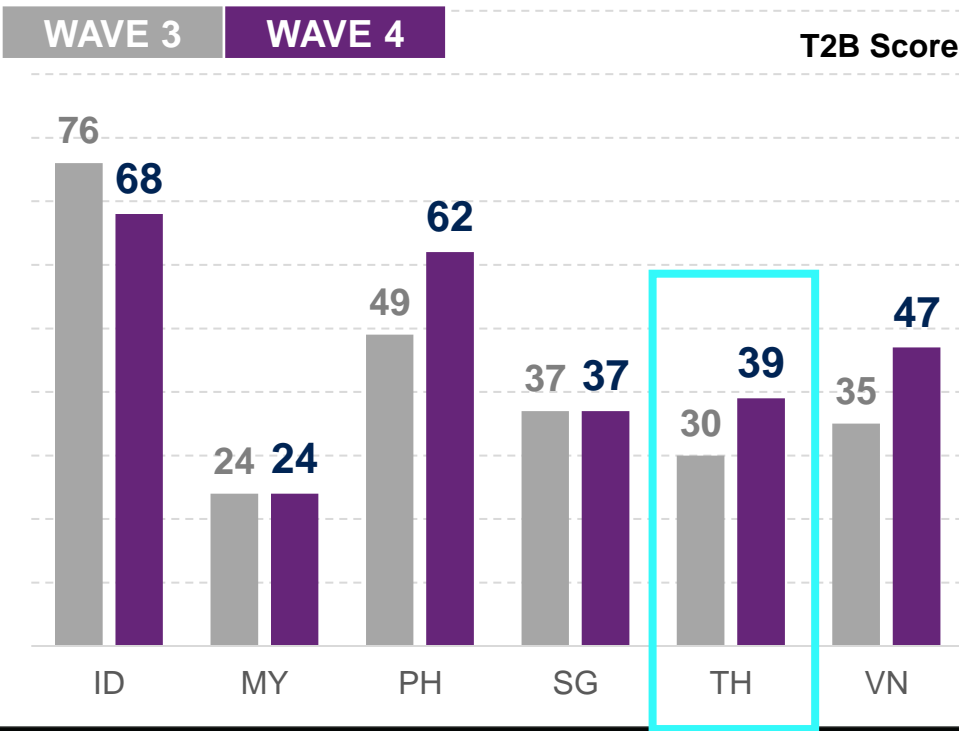
Q: Looking ahead six months from now, do you expect the economy in your local area to be... (T2B - Much Stronger/Somewhat Stronger)

## COUNTRY ECONOMIC SITUATION

### CURRENT SITUATION



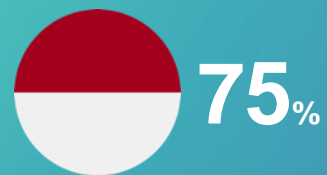
### NEXT 6 MONTHS



Figures in %

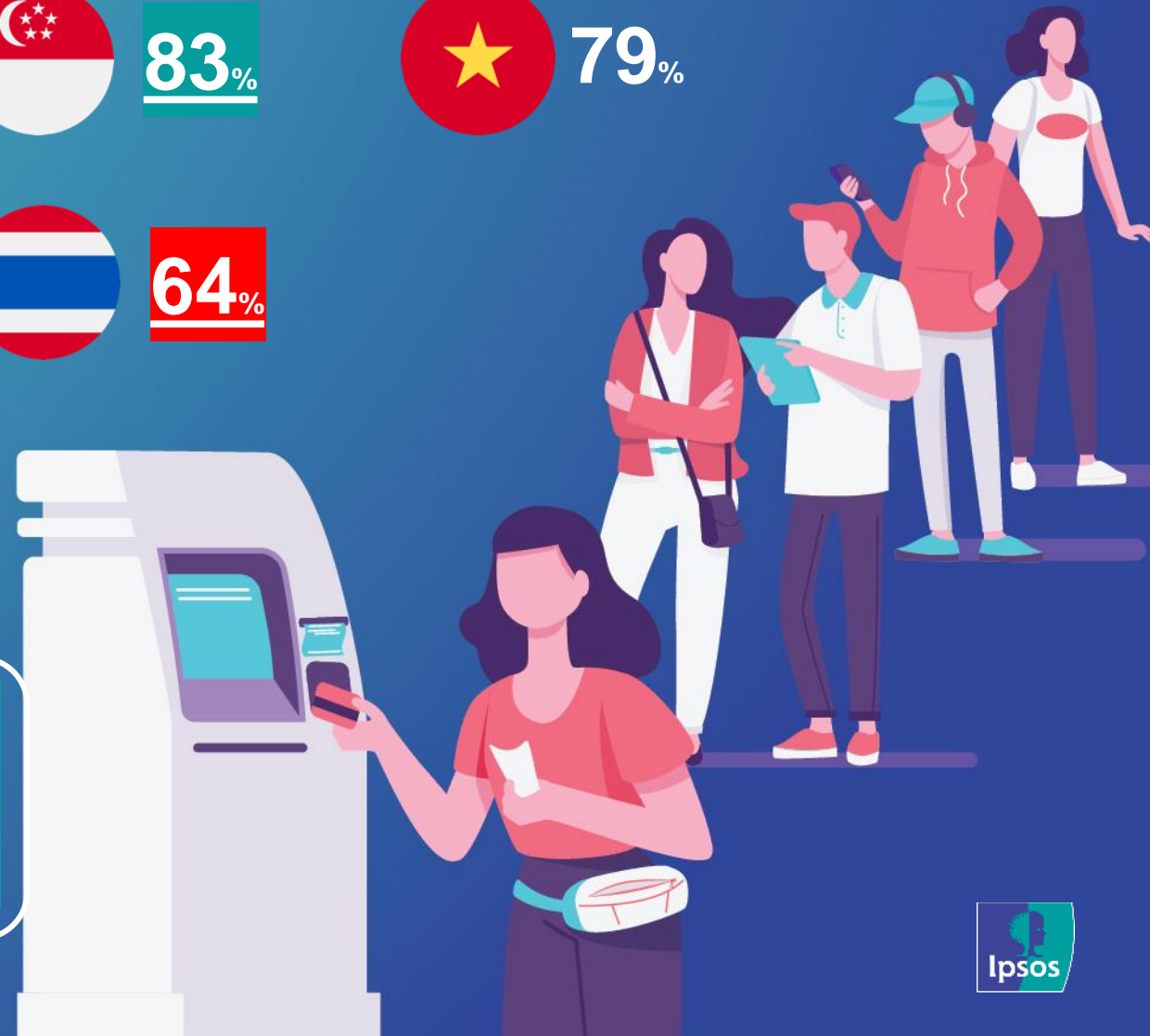


76% feel that their current personal financial situation is good or fair, with the highest being Singapore, and the lowest being Thailand



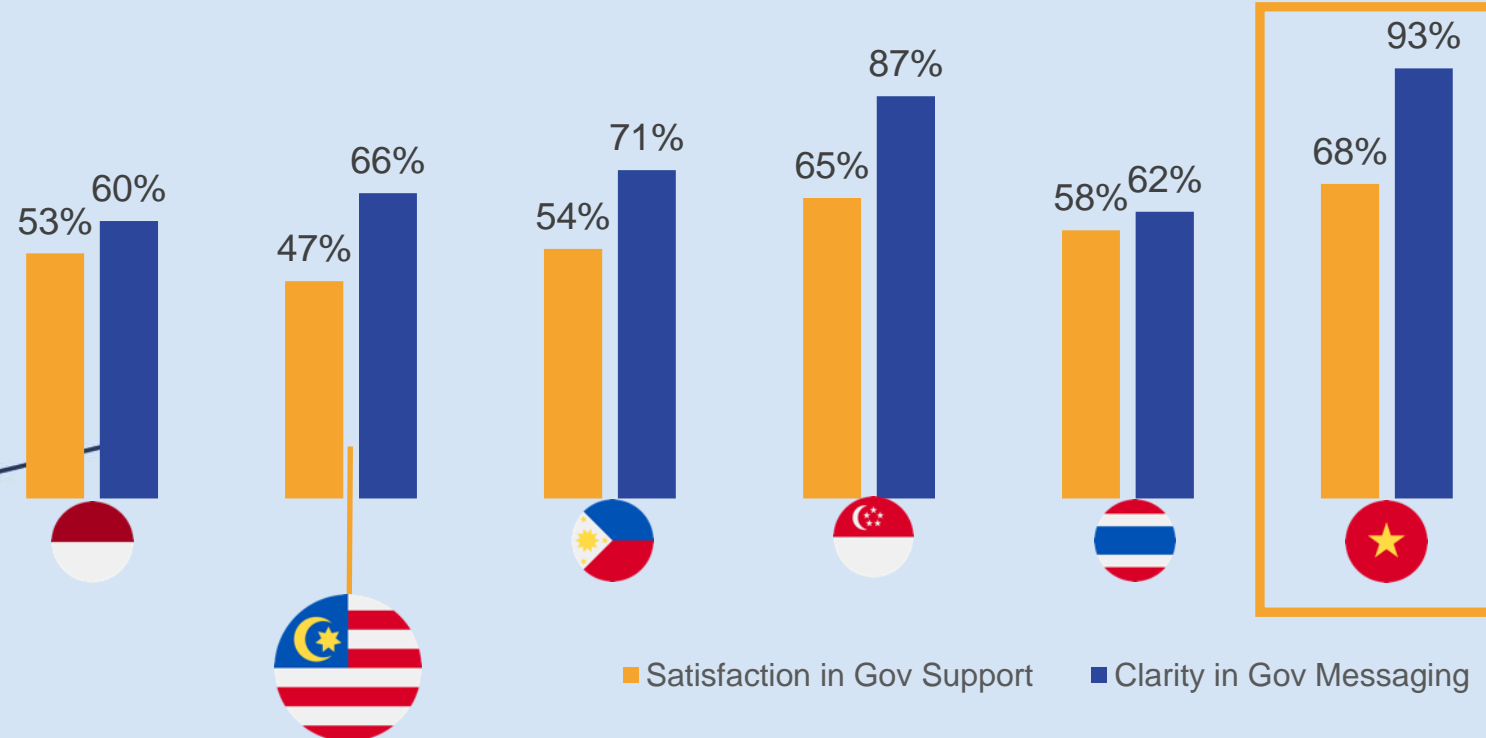
Next 6 months:

- Least optimistic - Malaysia
- Most optimistic – Philippines
- 47% of **Thais** think their personal financial situation will improve





Vietnamese are most satisfied with the overall government support during the pandemic, and also felt the messaging was the clearest



**Malaysians were the least satisfied with the government support**



# Health and cost of living issues should be the immediate key priorities for the Government

## Top 5 areas that Government should focus on for the next 6 months (Southeast Asia)



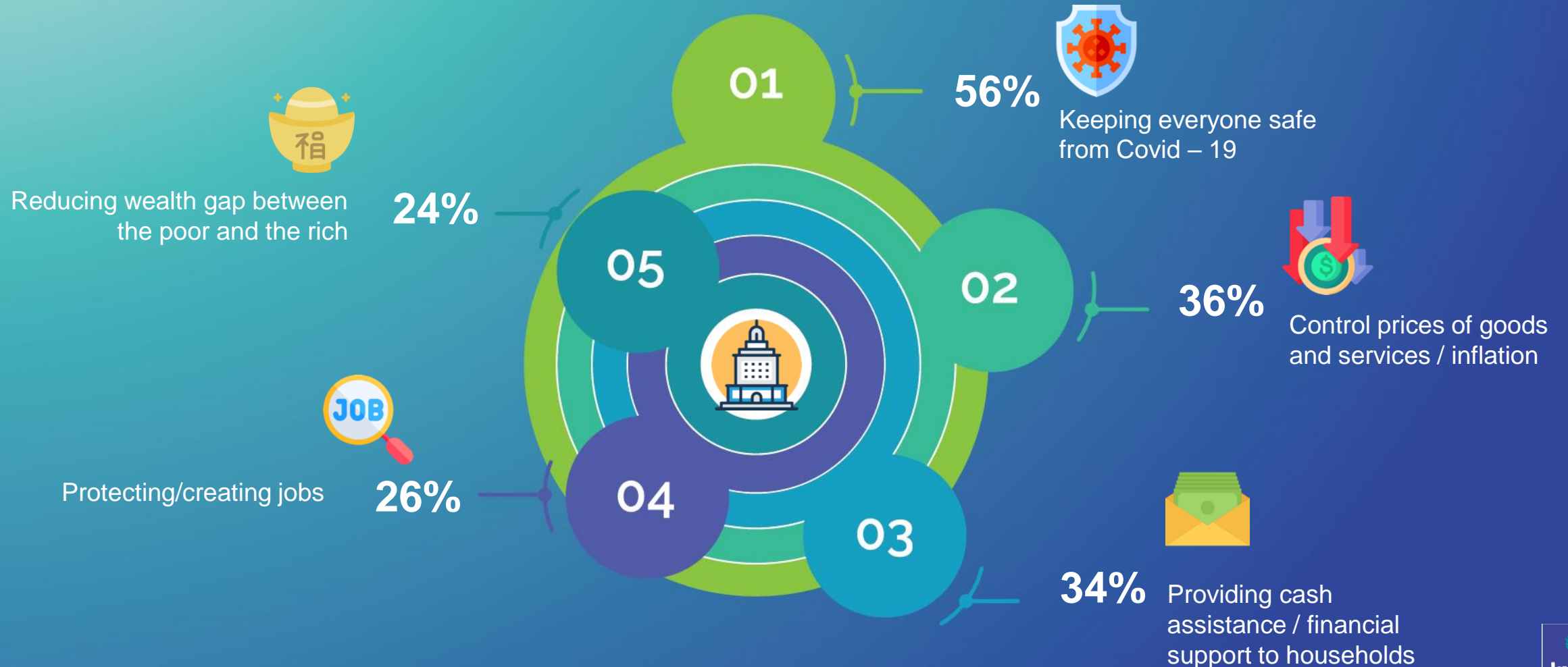
**Only 8 % felt addressing climate change / sustainability issues should be a key priority now**



Being safe and financially secured is the top priority for Thais. Reducing wealth gap is now an alarming sign for the country.

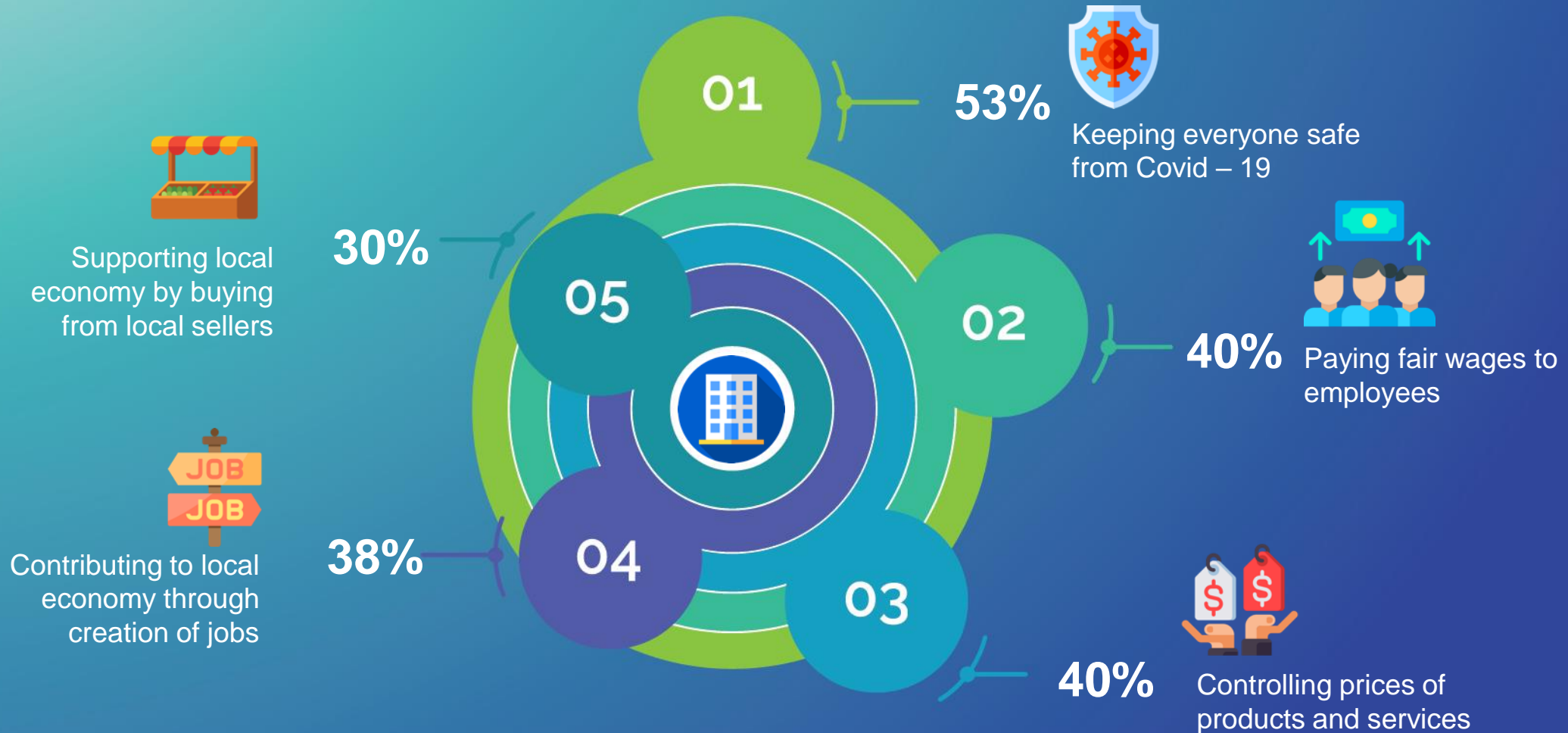


Top 5 areas that the **Thai Government** should focus on for the next 6 months



# Health and economic issues should be the key immediate priorities for Business or Private Sector to address

## Top 5 areas that businesses should focus on for the next 6 months

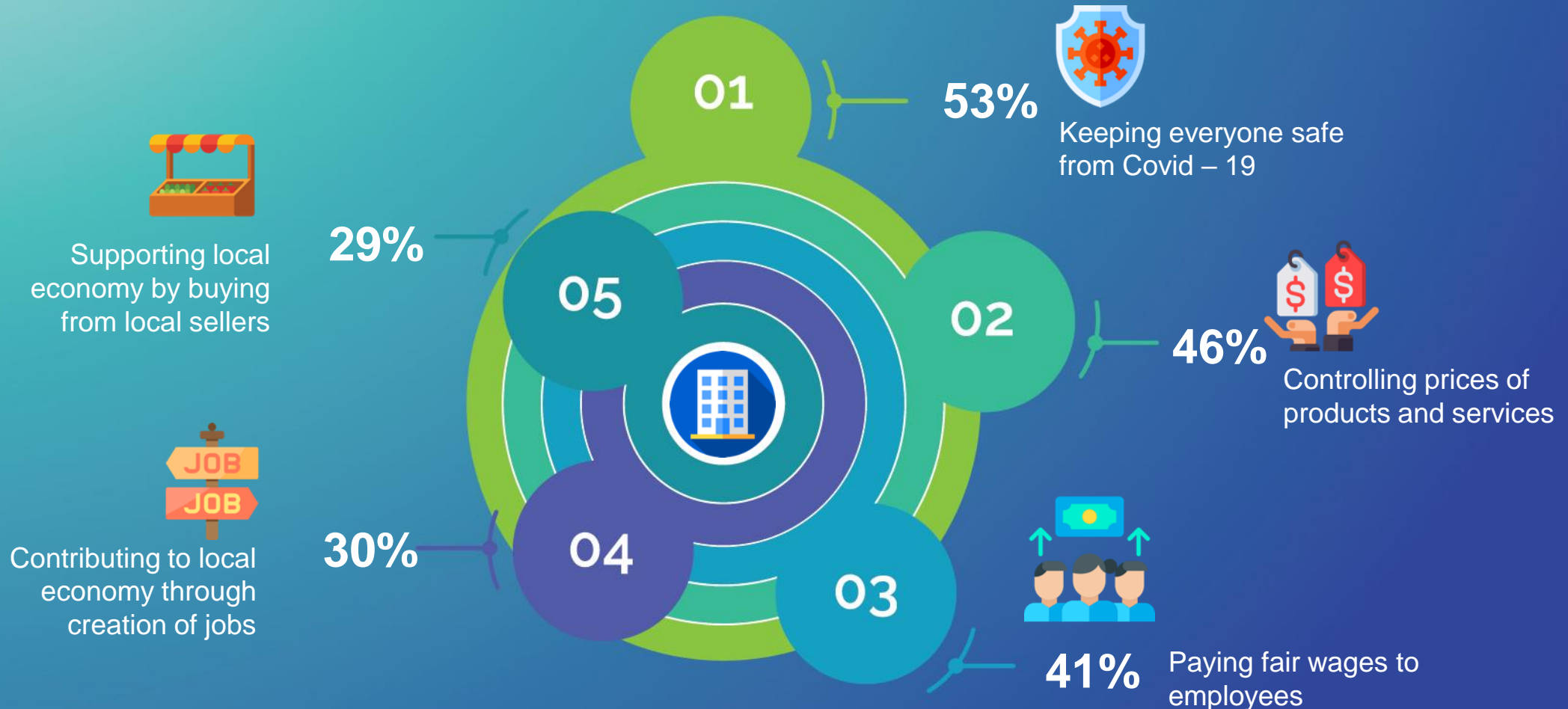




# Health and economic issues should be the key immediate priorities for Business or Private Sector to address

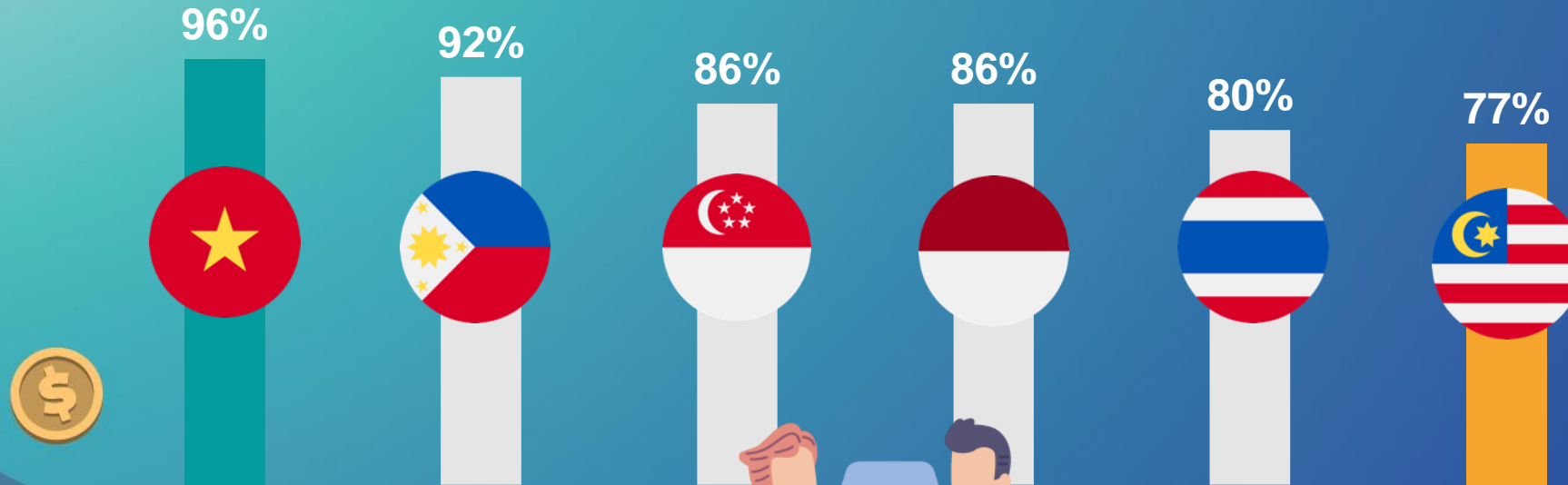


Top 5 areas that **Thais expect businesses** to focus on for the next 6 months



# Overwhelming majority felt large business have acted fairly during the pandemic

To what extent have large businesses acted responsibly  
(treated employees, customers and suppliers fairly, supporting local communities) during this pandemic





# Citizens across SEA feel the governments should still play an active role in many aspects of the economy

Who has the main responsibility

Government

Issues

Businesses

58%



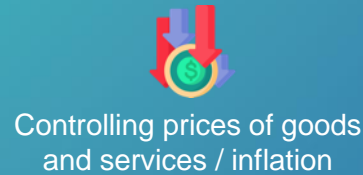
42%

82%



18%

83%



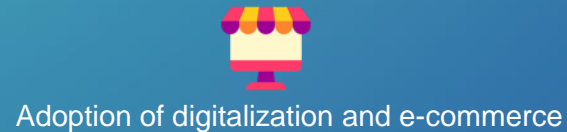
17%

76%



24%

41%



59%

79%



21%

39%



61%



66% of Thais felt the public sector should take the lead in job creation



# Similar to SEA, Thais believe that government should take important steps to improve the economy and well-being of people

Who has the main responsibility

Government

Issues

Businesses

66%



34%

80%



20%

84%



16%

79%



21%

47%



53%

68%



32%

37%



63%





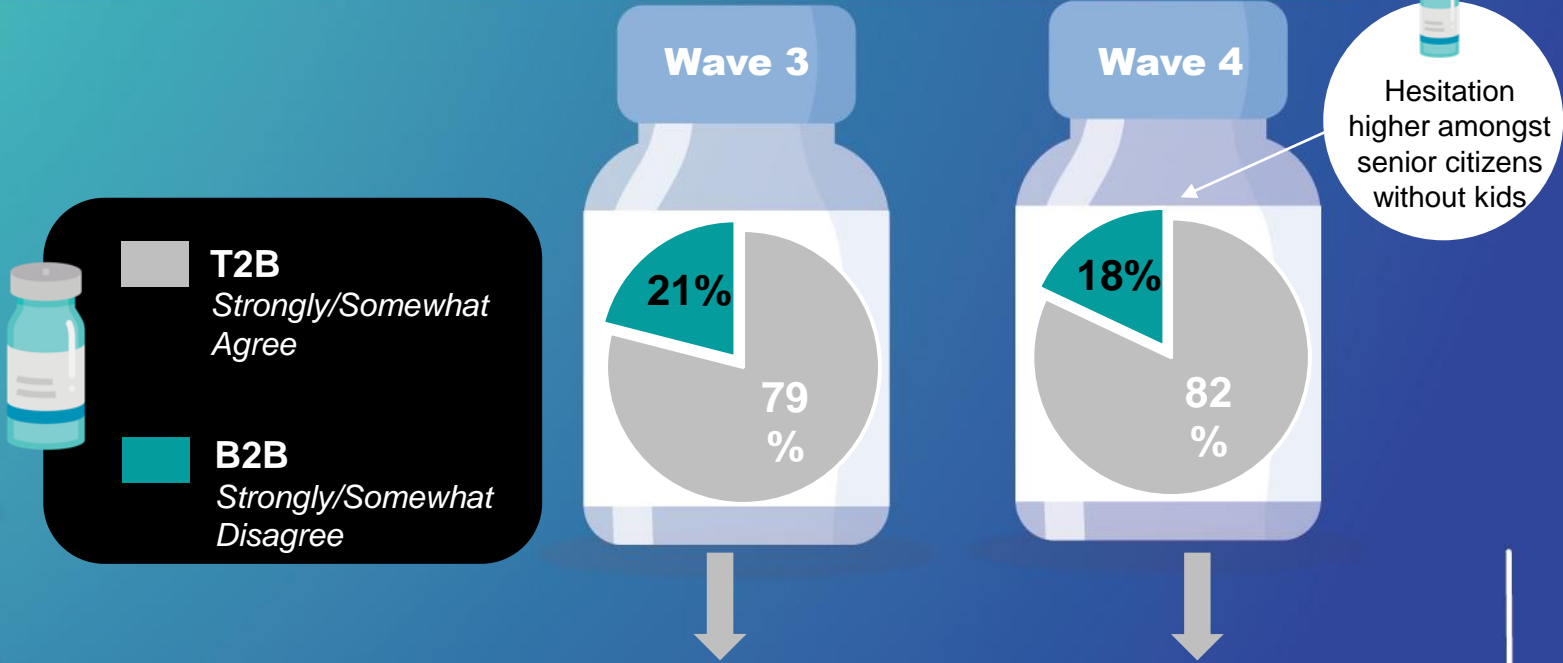
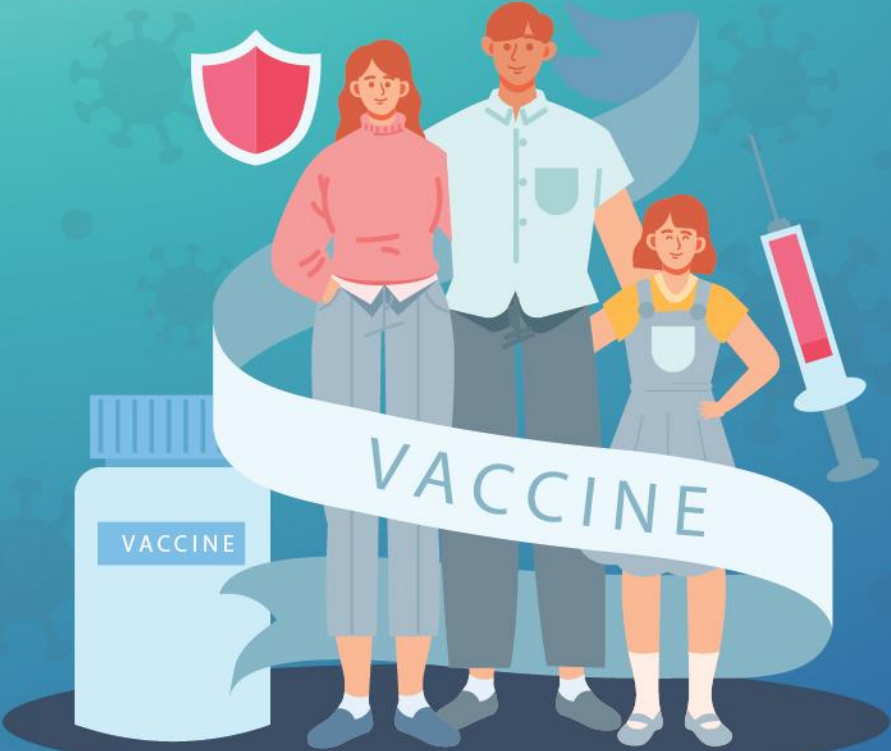
# What about interest in vaccination?



While most countries agree to getting vaccinated when made available to them, vaccine hesitancy has increased in Thailand and Indonesia

Southeast Asia (All countries)

If a vaccine for COVID-19 were available to me, would I get it?



Strongly/ Somewhat Agree	WAVE 3	WAVE 4
INDONESIA	80%	74% (-6%)
MALAYSIA	76%	93%
PHILIPPINES	68%	82%
SINGAPORE	77%	77%
THAILAND	79%	69% (-10%)
VIETNAM	94%	92%

# Extensive spread of misinformation or side effects from vaccines in Thailand could be a cause for vaccine hesitancy

Q: Please indicate whether you believe the following statements are true or false? (SA)

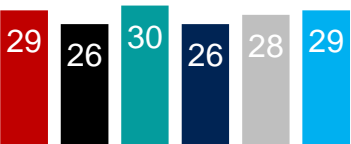
Score is for those who answer "TRUE"

## SOUTHEAST ASIA

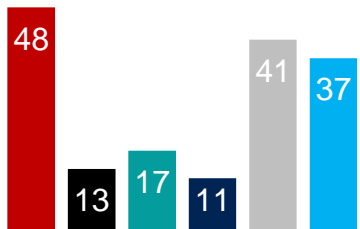
Score is for those who answer "TRUE"

The Covid-19 vaccine can itself cause me to contract Covid-19	28
It's better to build immunity to COVID-19 by getting the virus than by getting the vaccine	28
The health risk of the Covid-19 vaccine is bigger than the risk of the virus itself	27
Taking the COVID-19 vaccine could have a negative long-term impact on my health	18
Children don't get sick from COVID-19	8
5G telecommunications towers is causing or increasing Covid-19 infections	8

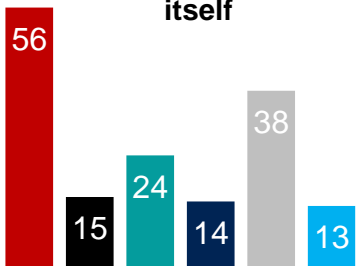
It's better to build immunity to COVID-19 by getting the virus than by getting the vaccine



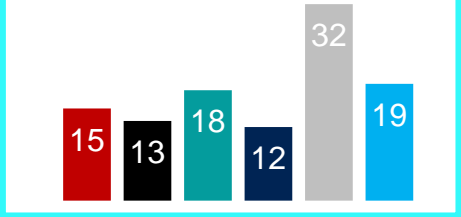
The Covid-19 vaccine can itself cause me to contract Covid-19



The health risk of the Covid-19 vaccine is bigger than the risk of the virus itself



Taking the COVID-19 vaccine could have a negative long-term impact on my health



5G telecommunications towers is causing or increasing Covid-19 infections



Children don't get sick from COVID-19



Indonesia  
Malaysia  
Singapore

Thailand  
Philippines  
Vietnam



# Fake news about the virus is spreading as fast



## Awas! Bahaya Hoaks Bisa Rugikan Program Vaksinasi COVID-19

Erika Dyah | detikHealth



### AWAS HOAKS Vaksin COVID-19 Mengandung Magnet

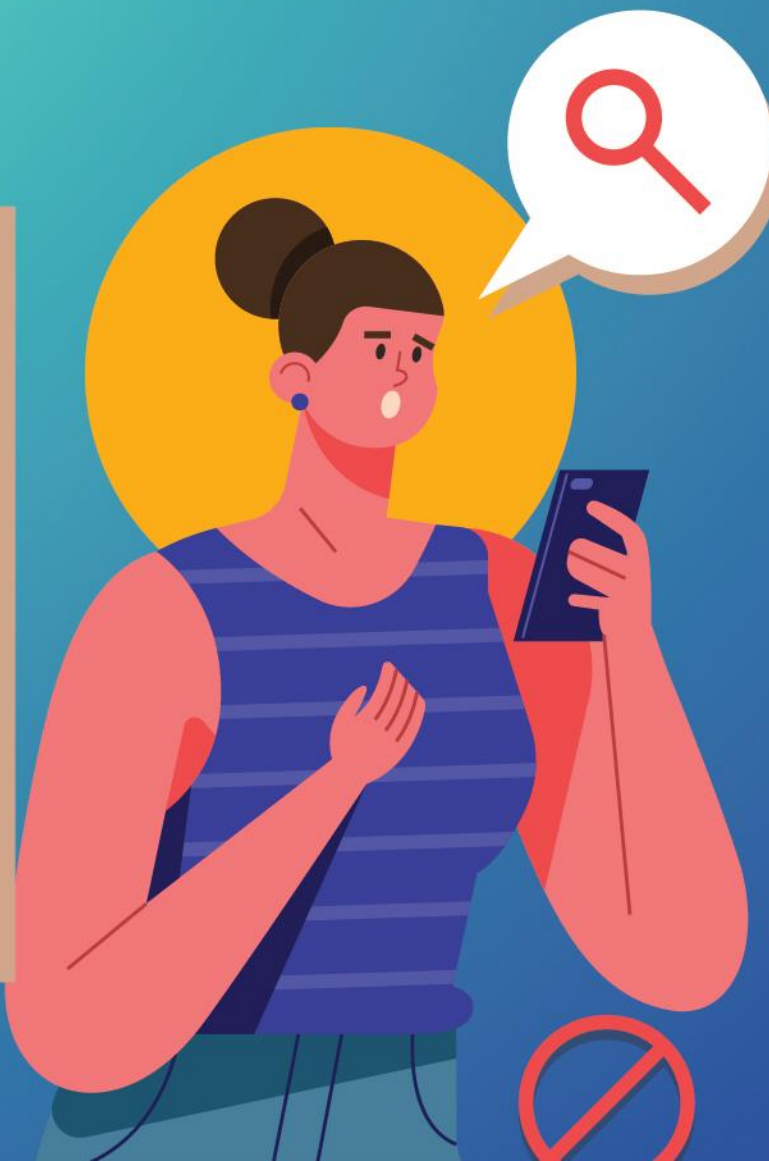
Sebuah pesan di media sosial WhatsApp yang mengklaim bahwa vaksin COVID-19 mengandung magnet, telah beredar di kalangan masyarakat. Hal ini tentu saja berbahaya karena dapat menimbulkan kecurigaan terhadap vaksin yang sebenarnya aman dan efektif.



### HOAX SEPUTAR VAKSIN COVID-19

1. Vaksinasi Vaksin akan meninggal dua tahun setelah menerima vaksin.
2. Vaksin COVID-19 mengandung unsur magnetik, chip pelacak dan dapat mengubah genom.
3. Vaksin Sirovac dapat menyebabkan efek samping memperbesar kelainan air.
4. Vaksin Sirovac adalah untuk kelainan paru-paru dan infeksi paru-paru.
5. Vaksin mengandung virus sel dan bakteri.

Kenyataannya, semua hal di atas tidak benar. Semua vaksin yang diizinkan di BIKOP dan mendapatkan sertifikat dari BPOM dan sertifikasi halal dari MUI.



## Fake news law nearly ready: DES

PUBLISHED: 21 MAY 2021 AT 04:00  
NEWSPAPER SECTION: NEWS  
WRITER: KOMSIAN TORTERUSIANA



A draft law authorising the Ministry of Digital, Economy and Society (DES) to order the collection of log files from data networks to deal with



# Consumer Confidence & Behaviour

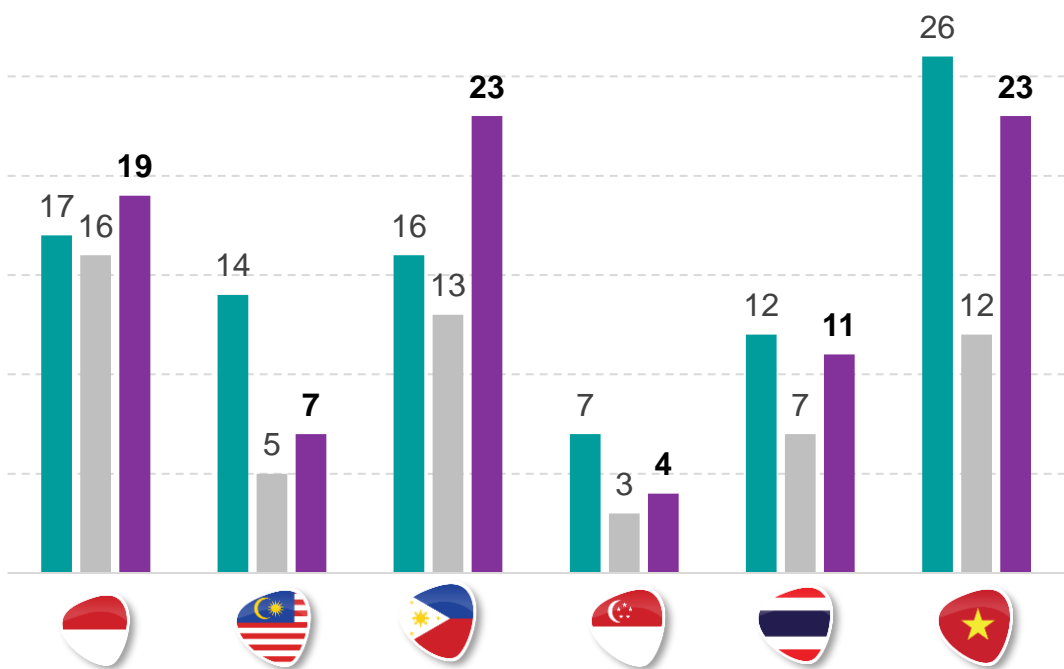


# Thais are becoming less comfortable with big-ticket purchases, seeing a consistent drop in the last three waves

Q: Compared to 6 months ago, are you NOW more or less comfortable with...

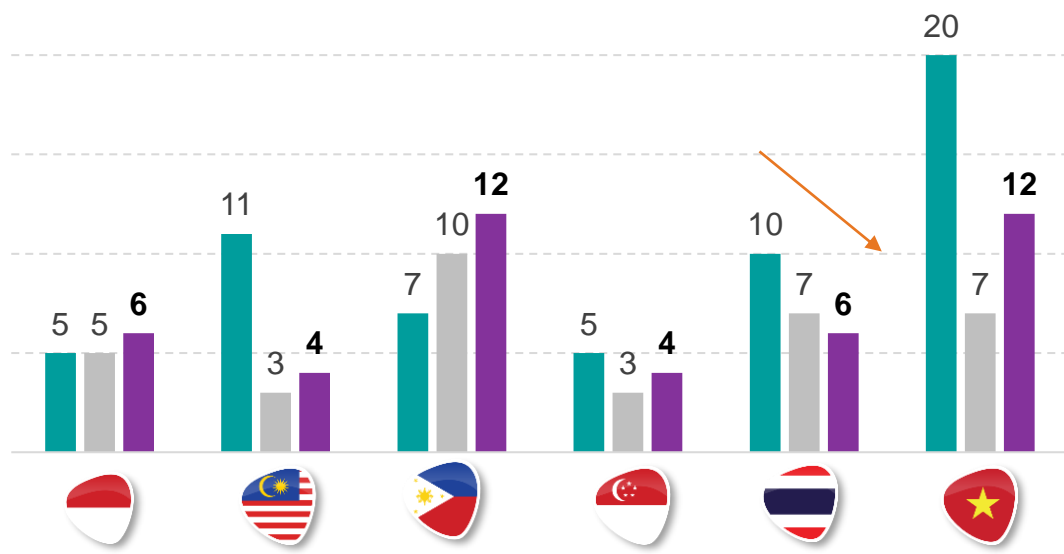
## JOB SECURITY – MORE CONFIDENT

SEP'20 FEB'21 JUN'21



## MAJOR PURCHASE (HOUSE / CAR) – MORE CONFIDENT

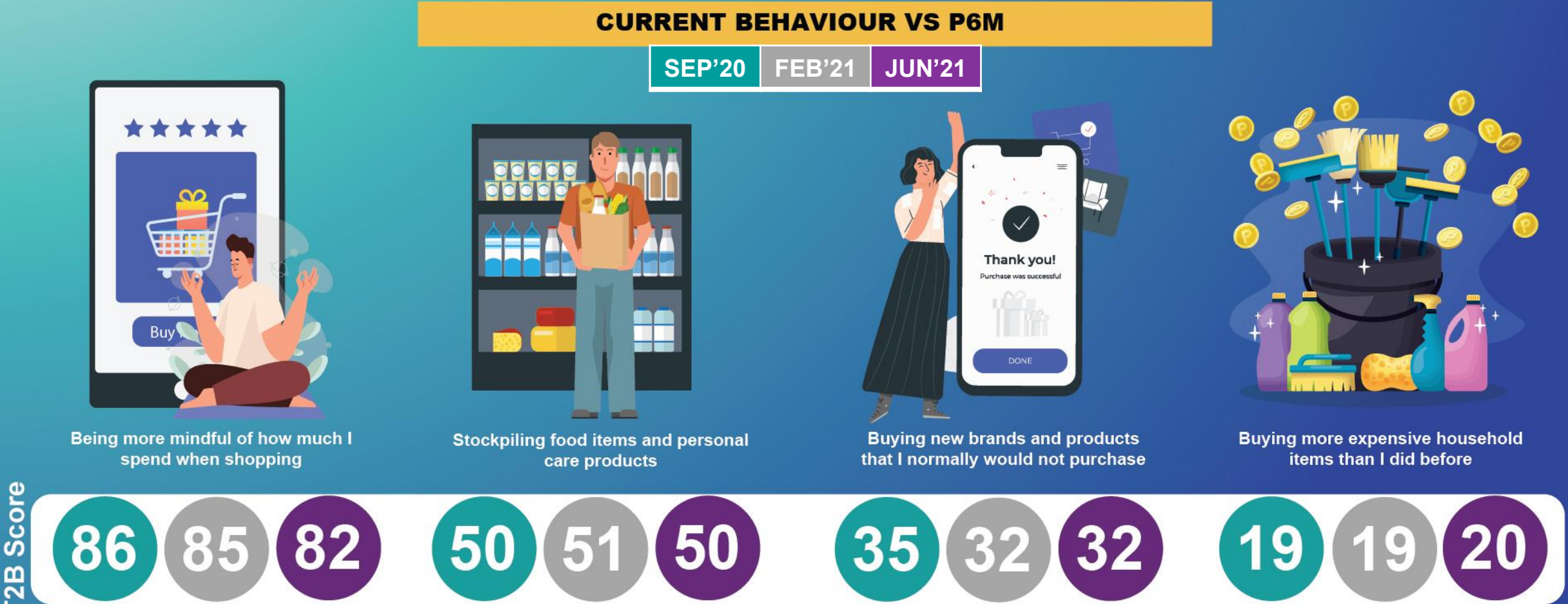
SEP'20 FEB'21 JUN'21





# Continue to put big ticket items on hold

Q: Thinking about your behaviour now compared to 6 months ago, how much do you agree or disagree with the following statements? (SA)



# Consumers across SEA would want to spend more on personal care, cleaning products and cooking at home

Q: When there's no more movement restrictions, 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?

## Spend More

46%

Cooking at home



28%

Personal care



34%

Cleaning product



## Spend Less

47%

Travelling



42%

Cultural activities



37%

Toys



35%

Dining Out

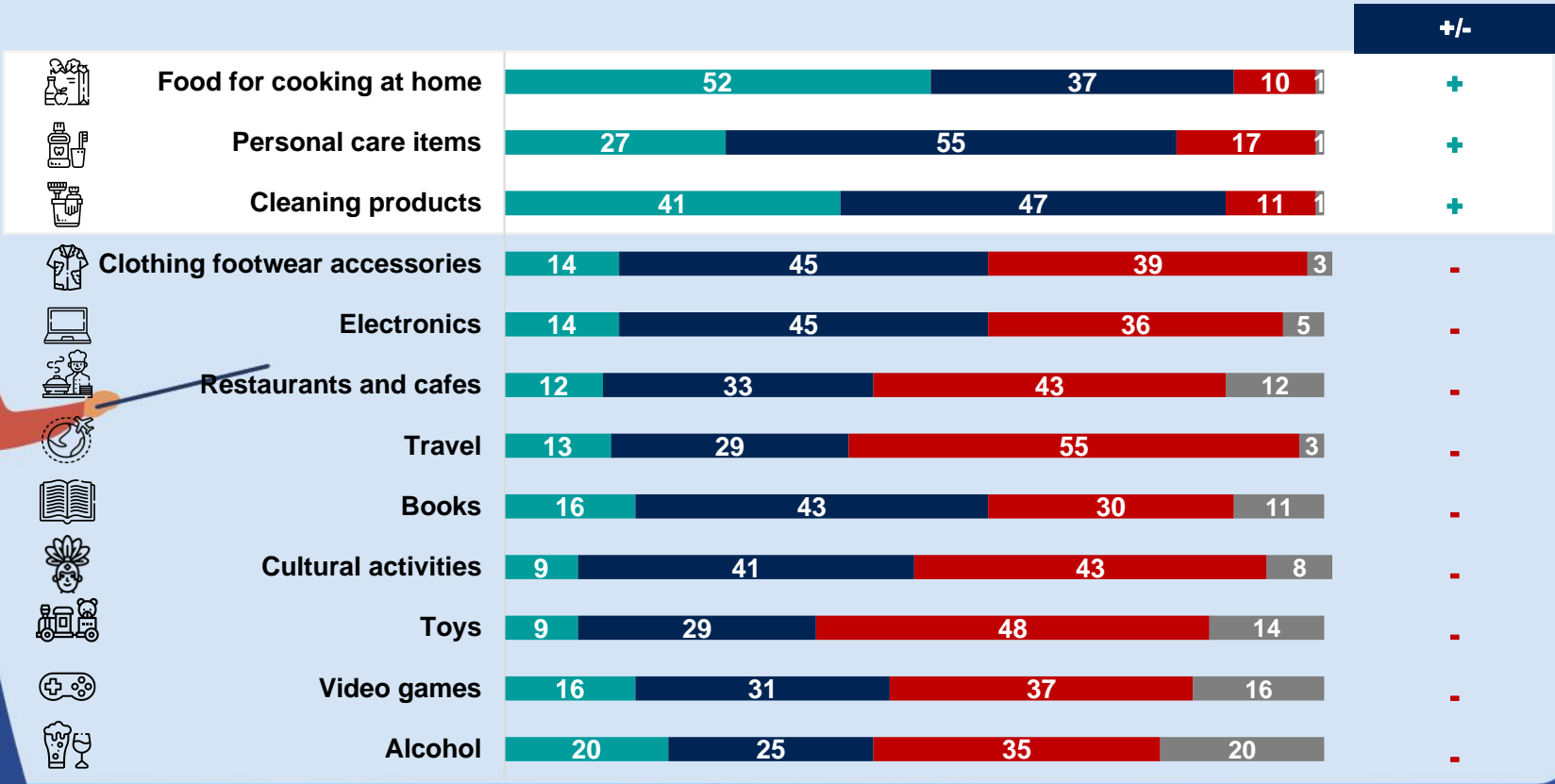


# Thais are now only spending on necessity items, reducing all indulgences

Q: When there's no more movement restrictions, 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?

## Thailand

More No change Less I don't spend any money on this at all



80% of Thais are being more mindful of how much they spend when shopping











# Reconnect with family, dine-out & travel domestically

Q: How comfortable would you be with doing each of the below activities during the next 3 months?



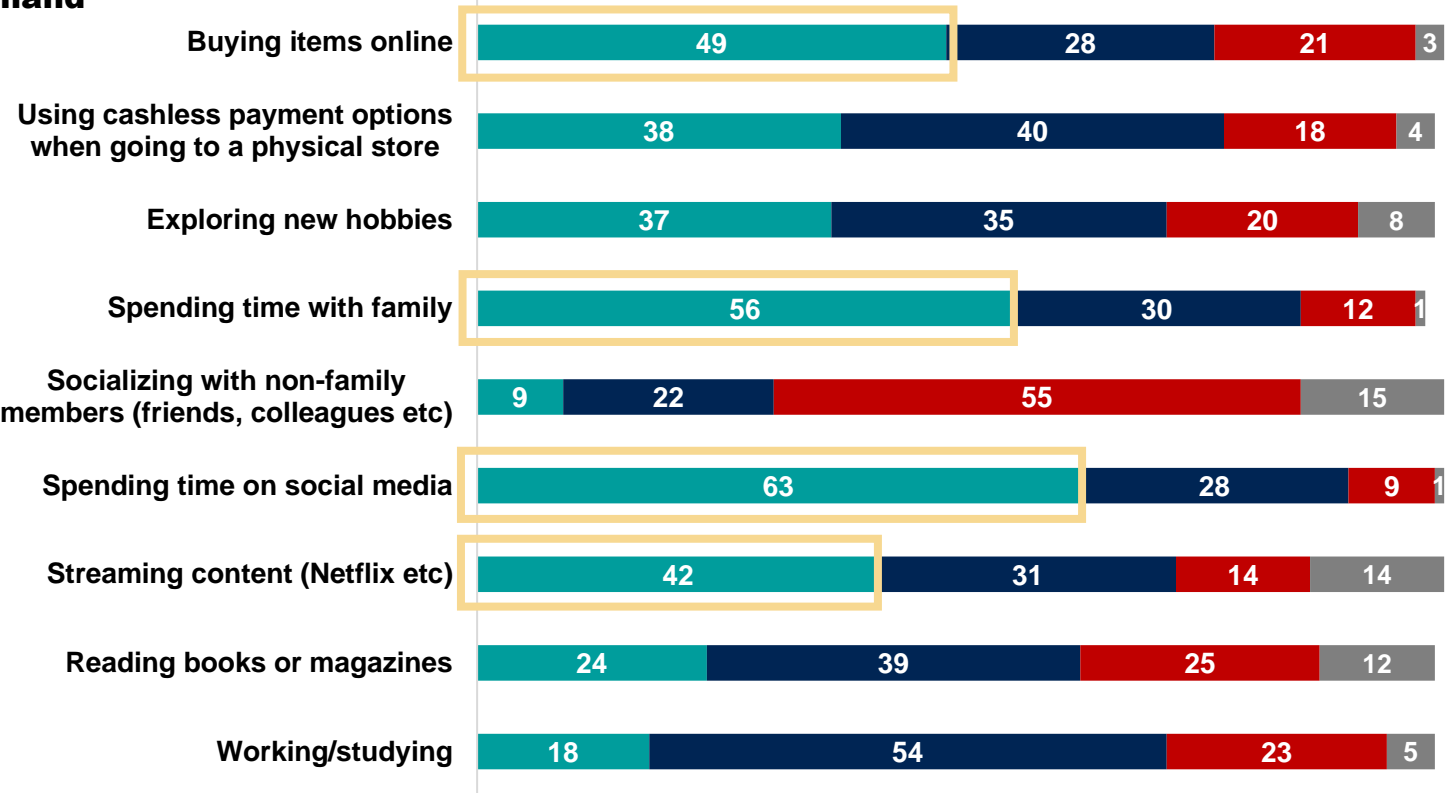
TOP 2 BOX						
Visit friends or family in their homes	51%	31%	53%	72%	41%	47%
Go to a restaurant	43%	30%	46%	59%	28%	32%
Travel domestically	33%	29%	33%	54%	32%	35%
Go to a gym/sports facility	33%	18%	30%	41%	24%	32%
Join a cultural event/gathering	24%	13%	25%	35%	22%	26%
Use public transportation	28%	18%	38%	67%	26%	33%
Travel to another country	13%	17%	24%	19%	20%	18%

# Thais have greater comfort with cashless and online purchases & spending more time browsing contents online



Q: Thinking about your habits now compared to 6 months ago, would you say that you do the below activities more, less or about the same?

## Thailand



For most Thais, staying home means spending more time with family as well as online.

More  
No change  
Less  
I never engage in this/This does not apply to me



# Around the region

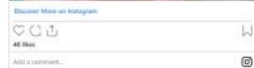


## Cooking

### Nghệ sĩ Việt nấu ăn, tập luyện thể dục

Từ đầu tháng 5, các nghệ sĩ nghiêm túc thực hiện giãn cách xã hội. Trong khoảng thời gian sống chậm, họ vào bếp nấu ăn, thử nghiệm các món mới, tập thể dục và ở bên gia đình.

Thanh Hằng chia sẻ khả năng nấu nướng của cô được cải thiện trong thời gian dài ở nhà. Từ các món mặn như phở, bún măng vịt đến các loại bánh ngọt, pha chế cocktail..., cô đều tự tin thực hiện.



## Online Shopping

### Dampak Pandemi, Transaksi Belanja Online Produk Kosmetik Naik 80%

Selasa, 24 November 2020



Pelaku industri kecil menengah (IKM) dituntut untuk bisa mencari peluang usaha di tengah kondisi pandemi Covid-19. Adanya adaptasi kebiasaan baru akibat pandemi, telah menggeser pola belanja dari offline menjadi online. Ini terlihat dengan meningkatnya transaksi online produk kosmetik sebesar 80%.

"Social distancing menyebabkan konsumen menjadi lebih banyak waktu di rumah, sehingga lebih banyak waktu merawat kulit, badan, dan rambut akibatnya belanja permintaan untuk perawatan di rumah semakin meningkat menggantikan kebutuhan salon dan spa," kata Direktur Jenderal Industri Kecil, Menengah dan Aneka (IKMA) Kementerian Perindustrian, Gati Wibawaningsih pada pembukaan Virtual Expo IKM Kosmetik 2020, Selasa (24/11).

*"49% konsumen men-download aplikasi online pertama kalinya"*  
~ *tekno Kompas*

### Filipinos lap up online shopping amid pandemic: survey

By Christine Guille April 10, 2020, 7:30 pm



**MANILA** (The online presence of businesses proved most useful during the pandemic as physical restrictions continue to be observed. A survey by the Philippine Statistics Authority (PSA) showed that consumers who were able to shop digitally amid the health crisis gained profits and it is more likely that consumers will continue to choose online shopping for their convenience.

The study indicated 87 percent of respondents are willing to spend more for sales of services to products or services. About 12,500 people across 14 countries, including the Philippines, were studied for changes in consumer behavior in 2020. Among Philippines-based respondents, 95 percent said they highly consider convenience and price when deciding on what to purchase. "Research tells us that we should draw inspiration from the fact that for most consumers, the best journey is not journey at all. And by putting your customer first, you can minimize friction, improve discovery, and maybe even set a new standard in convenience," Facebook



## Video Streaming

### Philippines ranks 4th among countries with most number of people subscribed to streaming service

By James Hwang July 5, 2020, 1:00 PM



Streaming battle in South-east Asia:  
Who's watching what



South-east Asian consumers are facing a selection dilemma of video-on-demand streaming services - whether to go for regional or global providers.

### "Streaming" Film, Alternatif Hiburan Terbaik Selama Pandemi Covid-19

"Streaming" film jadi kegiatan rutin banyak orang saat pandemi. Kendati tidak bisa diimbangi dengan menonton film di bioskop, kegiatan ini cukup mengobati kerinduan publik akan hiburan.

DAR GANDHARANGI/SATRIO RANGARSO WISANINGSIH  
Ber: 2020-05-28 WIB | 3 menit baca

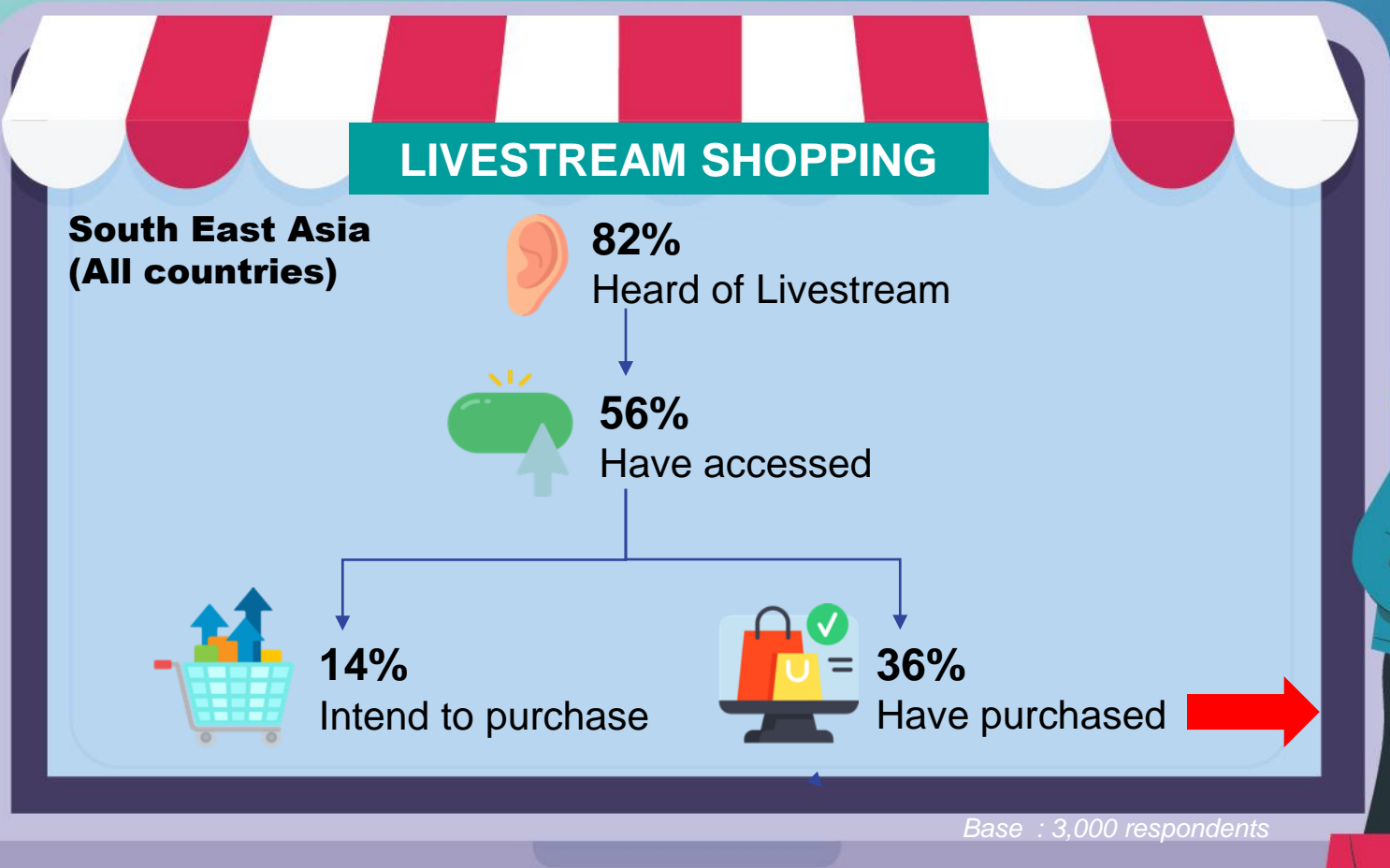
A Teks    





# Livestream shopping is filling the gaps for an active shopping experience

Q: Have you heard of Livestream Shopping?. (SA) / Have you accessed a Livestream Shopping event before? (SA) / Have you bought anything through a Livestream Shopping event? (SA) / What kind of items have you purchased through a Livestream Shopping event? (SA)



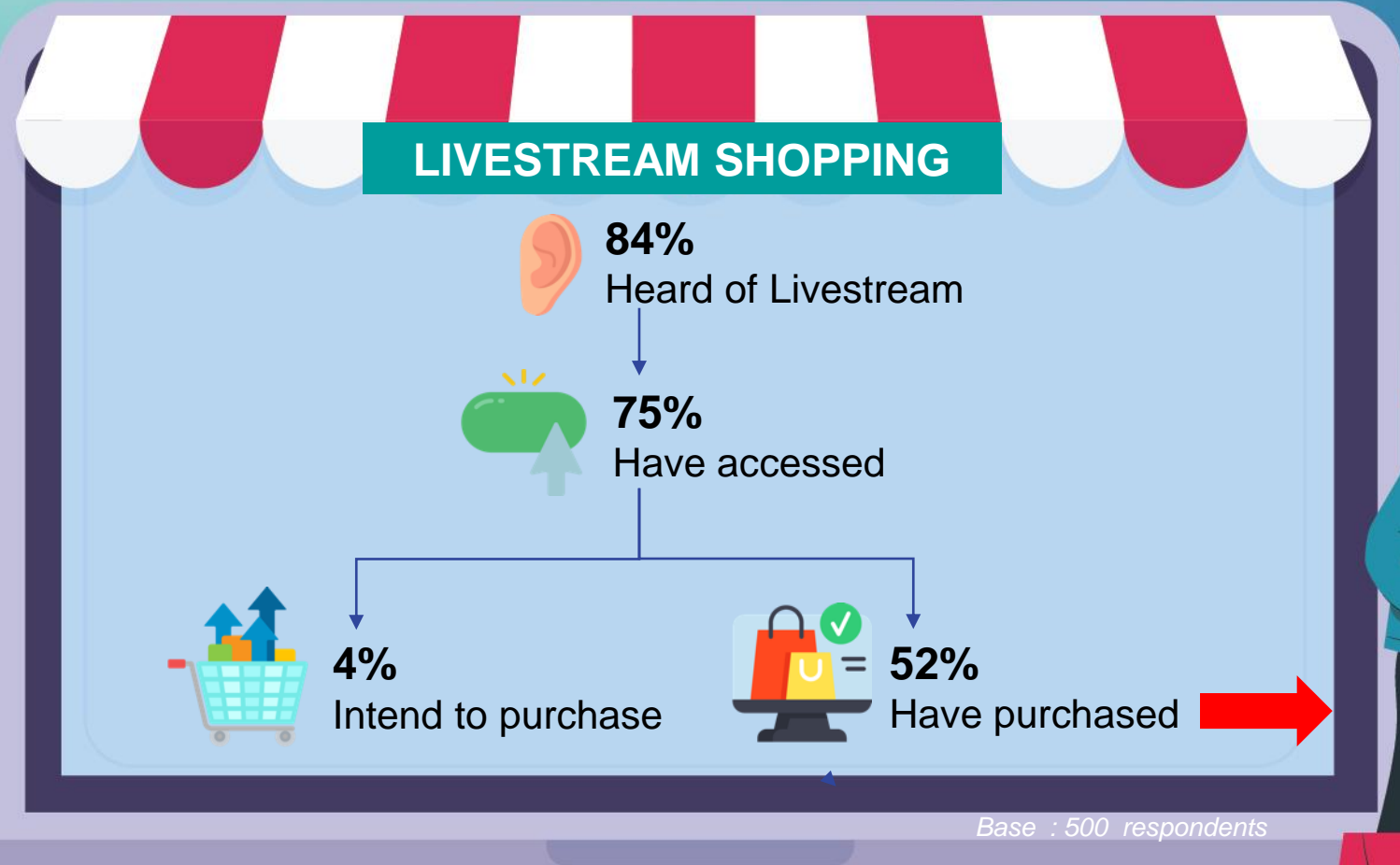
RECEIPT	
Items Purchased	
Base have purchased (1,078)	
Clothing footwear fashion	51%
Food items	15%
Personal care/ beauty products	14%
Household products	10%
Beverage items	4%
Toys and games	3%
Other please specify	2%

**THANK YOU!**

# Livestream shopping is nothing new to Thai consumer and online shopper experience has improved.



Q: Have you heard of Livestream Shopping?. (SA) / Have you accessed a Livestream Shopping event before? (SA) / Have you bought anything through a Livestream Shopping event? (SA) / What kind of items have you purchased through a Livestream Shopping event? (SA)



RECEIPT	
Items Purchased	
Base have purchased (257)	
Clothing footwear fashion	56%
Food items	14%
Personal care/ beauty products	11%
Household products	7%
Beverage items	4%
Toys and games	4%
Other please specify	2%

**THANK YOU!**

# The mental ill-health pandemic

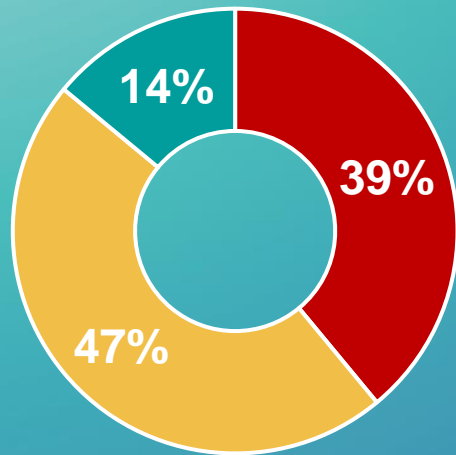




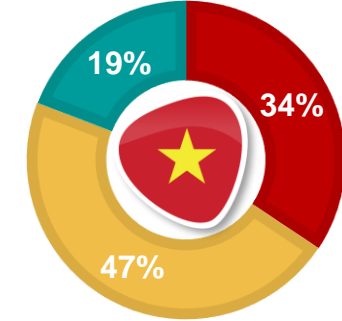
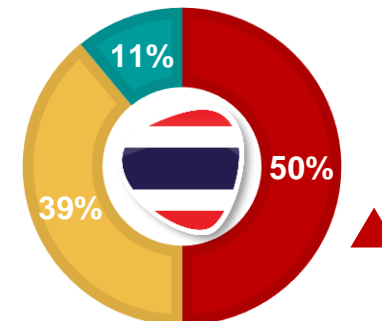
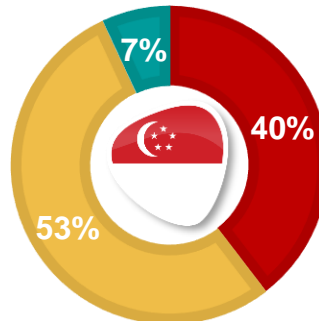
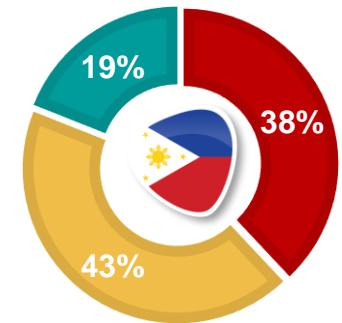
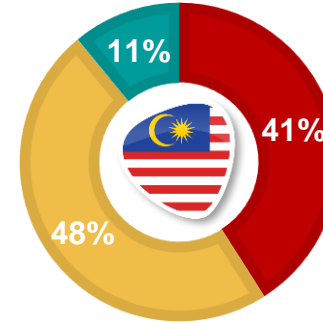
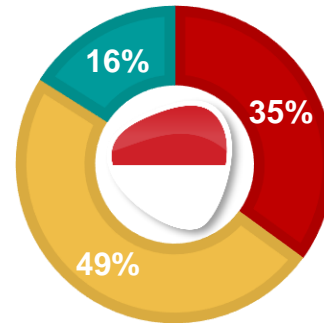
# Thailand reports significantly higher response of worsened mental health in the past 6 months

Q: In the past 6 months, which of the below statements best describe your mental wellness? (SA)

## South East Asia (All countries)



- ☒ I was feeling more down than before
- ☐ There was no change in my mental wellness
- ☐ I was feeling happier than before



▲ Significantly higher than Total SEA

# KEY TAKEAWAYS

## CITIZEN



- While economic conditions are improving not all equally optimistic
- Interest in vaccines on the rise but need address fake news and engage senior citizens living alone



## CONSUMERS



- Pandemic continue to sway consumer decisions
- Hesitation to purchase big ticket items
- Shopper journey stages continues to migrate online
- Live streaming turning to be a huge opportunity for engagement.



## SOCIETY



- 39% of adults in SE Asia feel that their mental health has been impacted by the pandemic
- Social Stigma prevents people from seeking help
- Need for normalization of mental health seeking behavior



# BE SURE. GO FURTHER.

For more information, please contact:

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GAME CHANGERS

