2021 PREDICTIONS & CONSUMER SENTIMENTS

February 2021

Annie Chan, Ipsos

GAME CHANGERS









70%

2020 was a bad year for me and my family

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

Market Agree Disagree Hg H8 H7 H6 All markets 70% 30% 50% 46% 48% 51% Turkey 89% 11% 61% 65% 66% 61% Italy 80% 20% 51% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55% 55%	Market	Agree		D	icaaroo	70 Agi		4.7	44.0
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% Agree

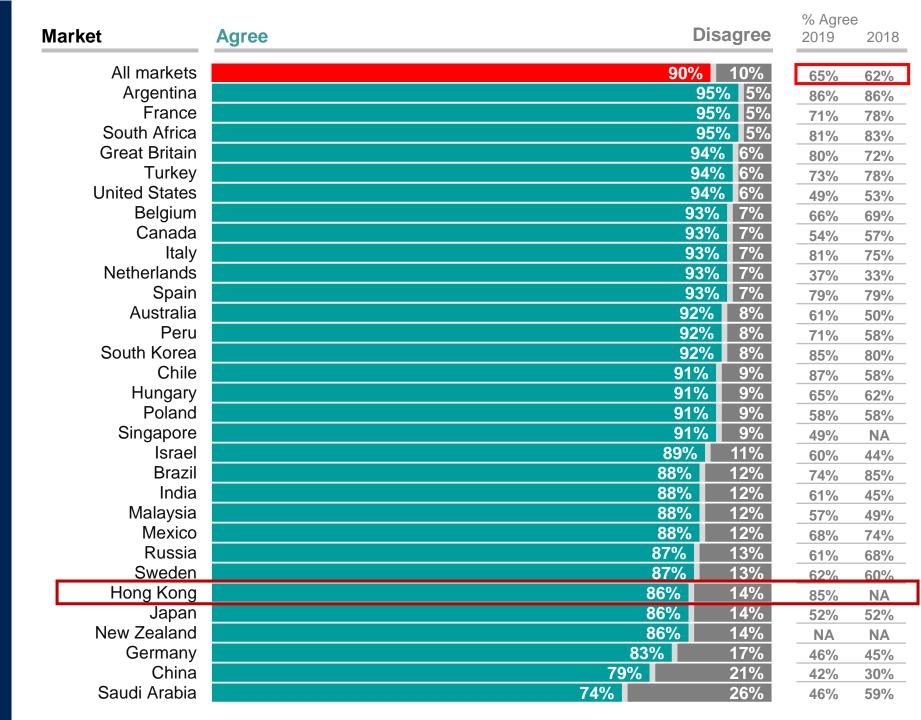


90%

2020 was a bad year for my country/city

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

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77%

l am optimistic that 2021 will be a better year for me than it was in 2020

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

				% Agr	ee		
Market	Agree		Disagree	' 19	'18	'17	'16
All markets		77%	23%	75%	75%	76%	78%
China			94% 6%	91%	84%	88%	91%
Peru			92% 8%	92%	94%	93%	96%
Mexico			91% 9%	87%	90%	87%	85%
Saudi Arabia		8	9% 11%	84%	84%	74%	77%
Chile		87	% 13%	81%	77%	88%	81%
South Africa		87	% 13%	85%	86%	85%	90%
Hungary		84%	16%	84%	79%	84%	83%
India		84%	16%	92%	91%	87%	91%
Argentina		82%	18%	77%	70%	83%	86%
Australia		82%	18%	74%	81%	76%	76%
Israel		82%	18%	79%	75%	NA	NA
Malaysia		82%	18%	78%	87%	77%	NA
Netherlands		82%	18%	75%	71%	NA	NA
New Zealand		82%	18%	NA	NA	NA	NA
United States		82%	18%	79%	81%	80%	81%
Brazil		81%	19%	82%	85%	84%	83%
Canada		77%	23%	77%	77%	76%	77%
Russia		76%	24%	76%	69%	85%	87%
Singapore		76%	24%	68%	NA	NA	NA
Sweden		74%	26%	68%	71%	72%	74%
Great Britain		73%	27%	65%	62%	66%	68%
Poland		73%	27%	73%	77%	77%	76%
Hong Kong		68%	32%	54%	NA	NA	NA
Spain		67%	33%	69%	76%	74%	77%
Turkey		67%	33%	71%	60%	69%	79%
Belgium		66%	34%	58%	60%	65%	66%
South Korea		65%	35%	62%	61%	69%	76%
Italy		64%	36%	63%	68%	60%	67%
Germany		63%	37%	59%	68%	67%	68%
France		53%	47%	50%	50%	55%	52%
Japan	44%		56%	45%	42%	44%	54%

% Agree



54%

The global economy will be stronger in 2021 than it was in 2020

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

Market	Agree		Disag	ree	'19	'18	'17	'16'
All markets		54%	4(6%	52%	53%	59%	54%
China			86% 14	4%	84%	76%	86%	82%
India		76%	24	4%	83%	85%	83%	85%
Saudi Arabia		76%	24	4%	72%	70%	56%	NA
Peru		72%	28	8%	79%	81%	81%	78%
Malaysia		70%		0%	65%	64%	59%	NA
United States		69%	3′	1%	58%	58%	62%	61%
Chile		65%	3!	5%	55%	68%	73%	73%
Singapore		63%	37	7%	49%	NA	NA	NA
Australia		60%	4(0%	46%	47%	57%	50%
Brazil		60%	4(0%	64%	76%	67%	68%
Mexico		59%	4′	1%	54%	70%	53%	43%
Argentina		57%	43	3%	52%	53%	57%	63%
South Africa		57%	43	3%	56%	61%	61%	55%
South Korea		54%		6%	38%	39%	53%	48%
Canada		53%		7%	41%	43%	55%	52%
Hong Kong		53%	47	7%	39%	NA	NA	NA
New Zealand		52%	48	8%	NA	NA	NA	NA
Russia		50%		0%	49%	44%	61%	59%
Japan	4	8%	52	2%	34%	28%	39%	43%
Turkey		8%		2%	52%	47%	57%	61%
Hungary	45			5%	48%	44%	61%	42%
Netherlands	45			5%	41%	45%	NA	NA
Israel	44%	6		6%	52%	48%	NA	NA
Italy	449	6	50	6%	33%	47%	43%	38%
Sweden	44%			6%	35%	44%	52%	44%
Great Britain	43%			7%	35%	30%	46%	35%
Germany	40%			0%	37%	48%	60%	44%
Poland	40%			0%	44%	53%	61%	41%
Spain	40%			0%	35%	43%	59%	56%
Belgium	37%			3%	33%	32%	50%	32%
France	31%		69	9%	26%	24%	36%	28%

% Agree

ON THE GROUND – THE HONG KONG OUTLOOK







66%

Income inequality in my country/ city will increase

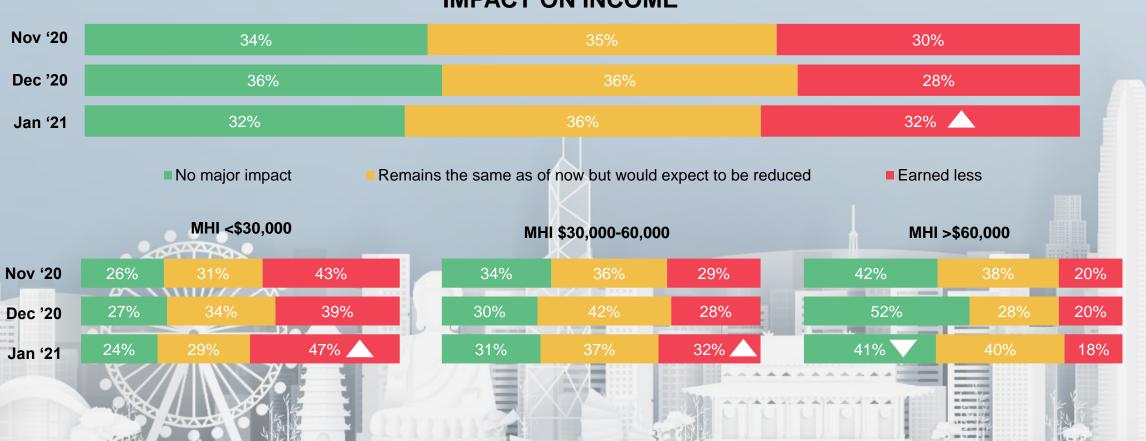
Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.

Market	Likely	Unlikely
All markets	66%	24%
Turkey		15%
Israel		11%
Italy	80%	12%
South Korea	77%	21%
Russia		17%
Malaysia	75%	16%
Argentina	74%	20%
Japan		16%
Spain		18%
Hong Kong		22%
Poland	72%	16%
Chile		19%
Sweden		20%
Netherlands		20%
Brazil	68%	22%
Peru		22%
Singapore		24%
Great Britain		21%
Belgium		25%
China		33%
India		30%
Mexico		28%
Saudi Arabia	60%	19%
Germany		32%
Hungary		29%
South Africa	57%	37%
France Canada		30%
Australia		31%
New Zealand	51% 50% 50% 50% 50% 50% 50% 50% 50% 50% 50	34%
United States		35% sos
Officed States	40/0	33/0

72% of Hong Kong people expect income inequality will intensify



IMPACT ON INCOME

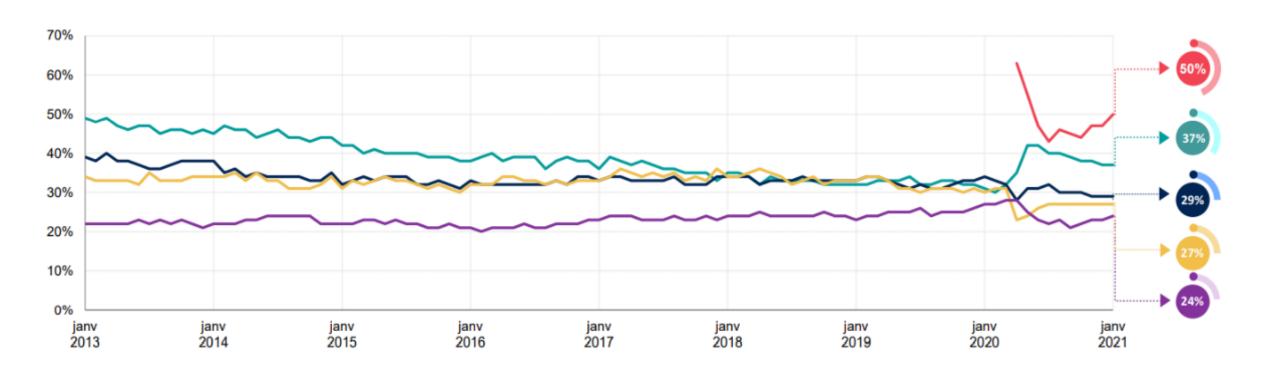


Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010
Ref: Is there any financial impact on your income since the outbreak of Covid-19?





World Worries: Long-Term Trends













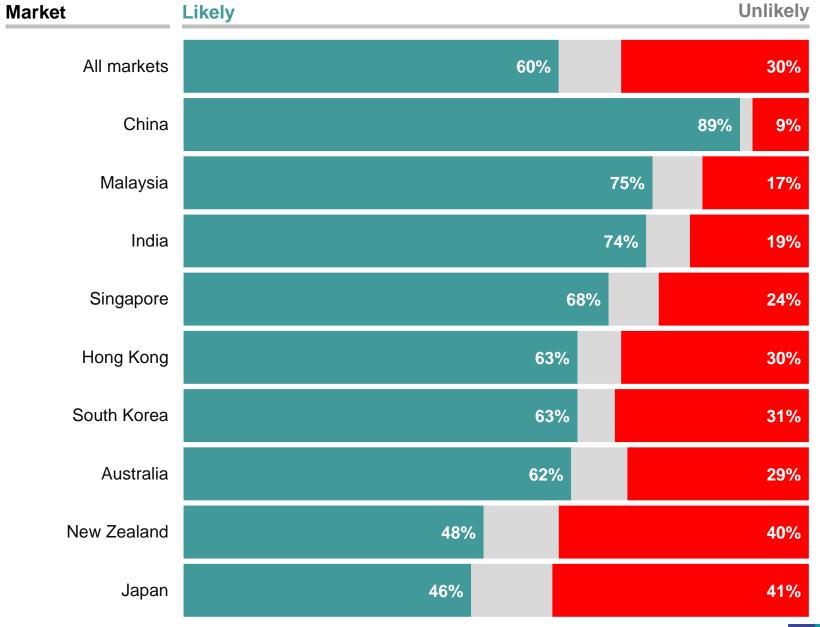
Base: Representative sample of 22,003 adults aged 16-74 in 27 participating countries, January 2013 - January 2021.

Source: Ipsos Global Advisor





A successful vaccine for COVID-19 will become widely available in my country/ city







Market

Likely

Life will have got back to normal after the effects of the COVID-19 pandemic in my country/ city

41% All markets 52% China 90% India 63% 31% Malaysia 61% 31% Hong Kong 45% 47% New Zealand 45% 47% 42% Singapore 54% South Korea 39% 57% Australia 37% 56% Japan 26% 61%

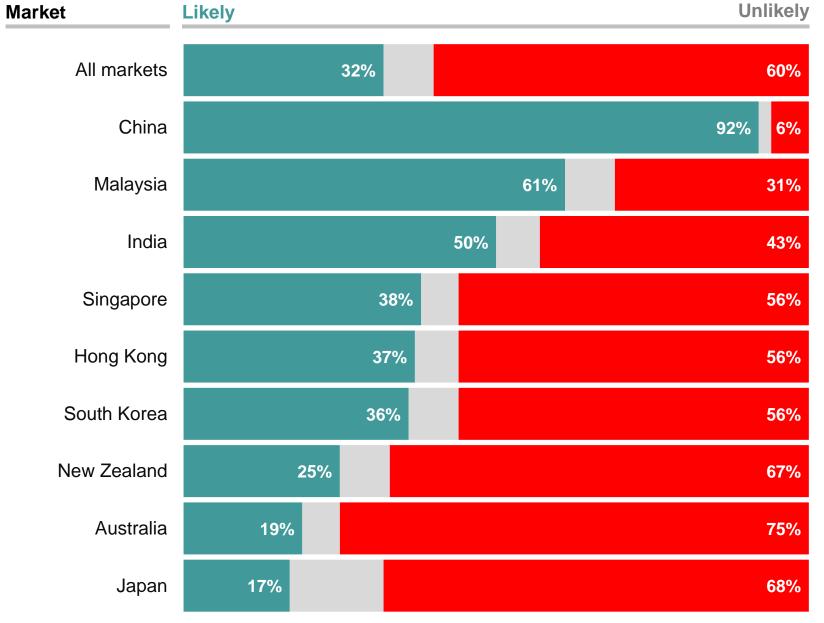
Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.



Unlikely



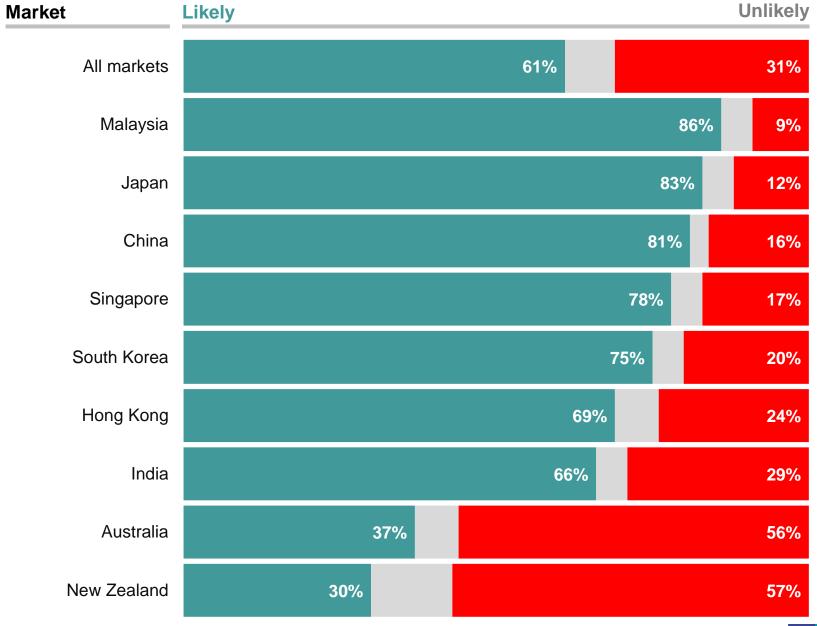
Economy in my country/ city will have fully recovered from the effects of the COVID-19 pandemic







Most people in my country/ city will wear a mask in public places a year from now

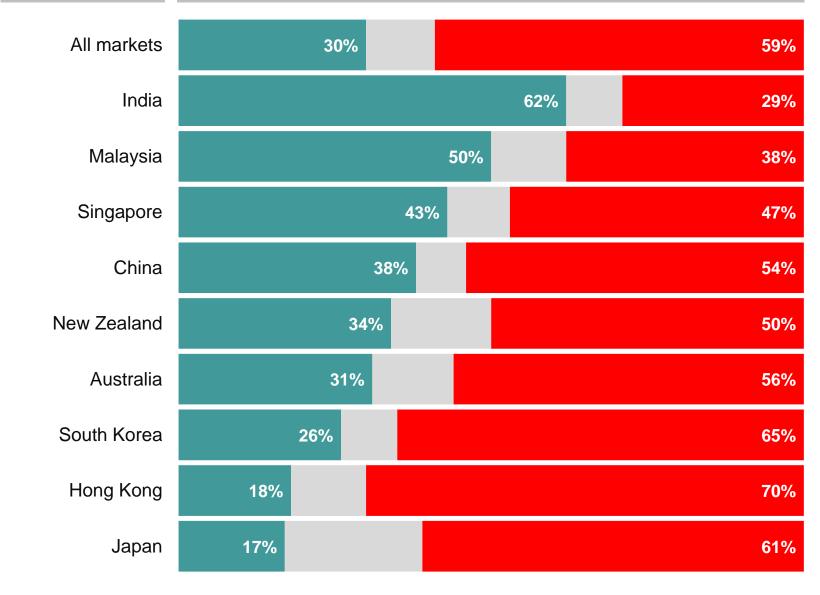






The world will change for the better because of the COVID-19 crisis









There will be a new global pandemic caused by a new virus

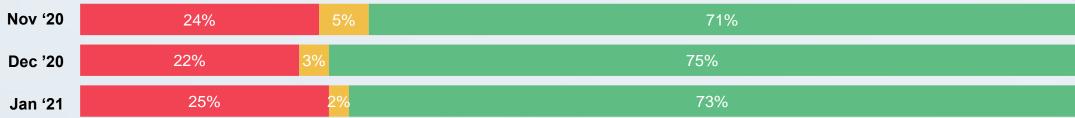
Unlikely Market Likely All markets 47% 32% Malaysia 70% 16% South Korea 69% 24% Singapore 55% 25% Hong Kong 54% 28% China 50% 41% India 43% 35% Japan 43% 32% New Zealand 42% 39% Australia 32% 45%



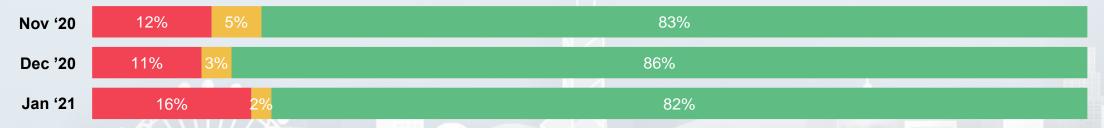
Social Responsibilities & Covid-19



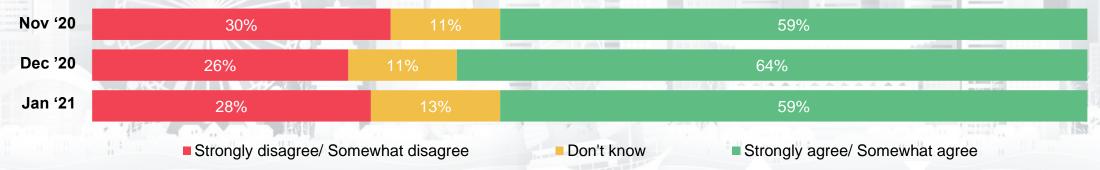
We should close the borders of Hong Kong and not allow anyone in or out until the virus is proven to be contained



Business should be changing their activities in a significant way to reduce the spread of the coronavirus



My employer has made changes in how it operates to prevent the spread of the coronavirus

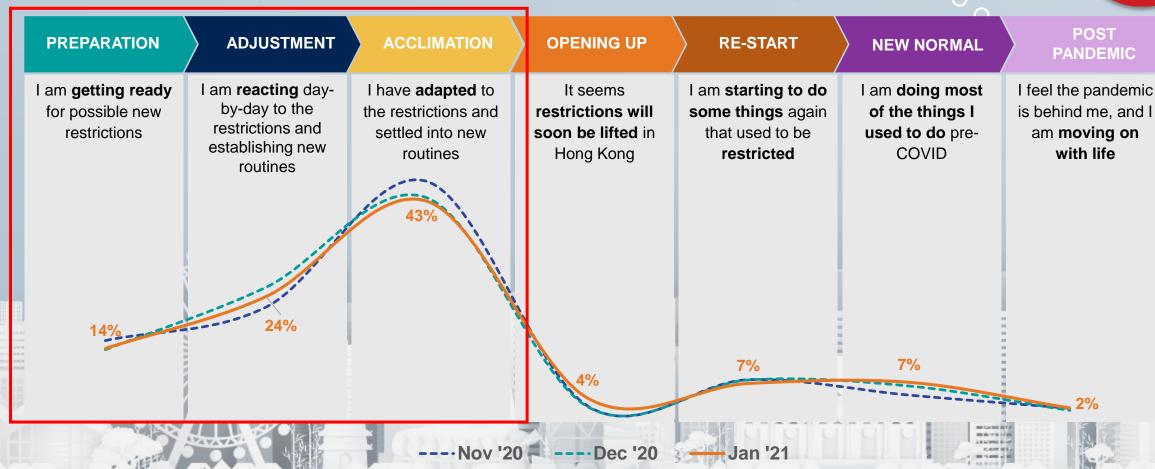


Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010
Ref: Is there any financial impact on your income since the outbreak of Covid-19?



New year, same pandemic

Which one of the following phases do you feel best describes your current situation regarding the Covid-19 pandemic?



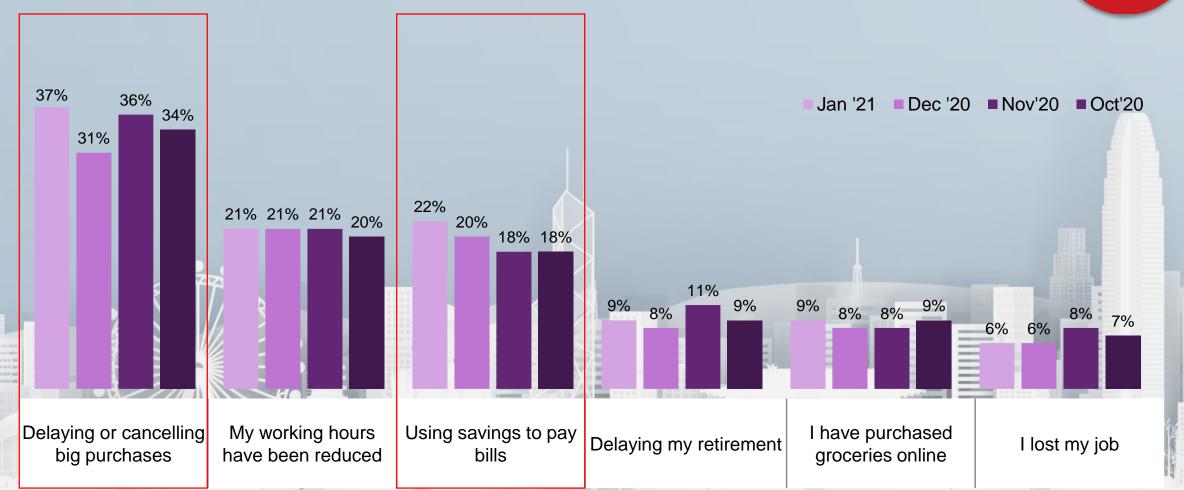
Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010

Ref: There are often several phases or stages that people go through when times is hard. Which one of the following phases do you feel best describes your current situation regarding the Covid-19 pandemic?



The negative financial impact has deepened



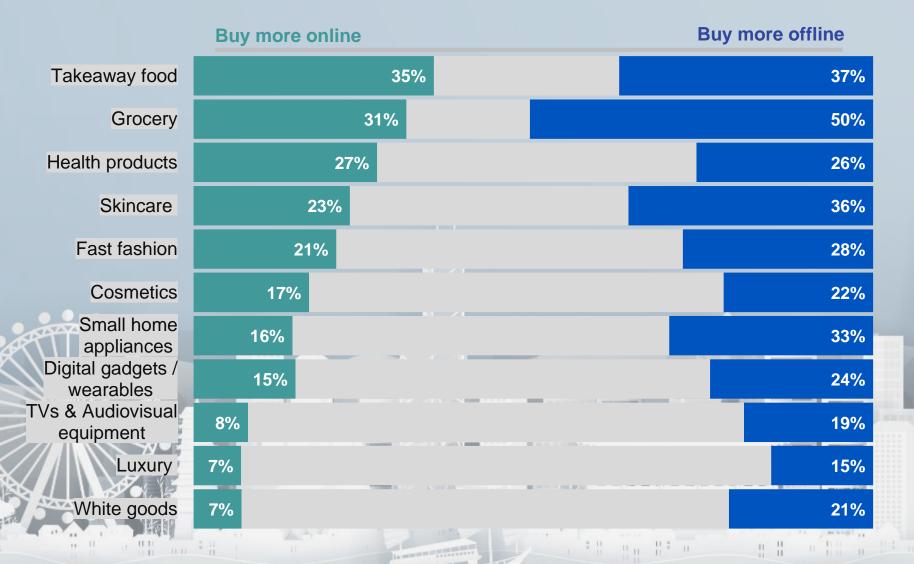


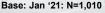
Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010

Ref: Please indicate how you plan for your investment and saving strategy during current social and economic situation.



More Online or More Offline in 2021





Ref: Please indicate how you plan for your investment and saving strategy during current social and economic situation.



Behavior Speaks for Itself



PAST 4 WEEKS INCIDENCE



Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010
Ref: Have you done any of the following over the past 4 weeks? Please select all that apply...



ON THE GROUND – ONLINE PURCHASE





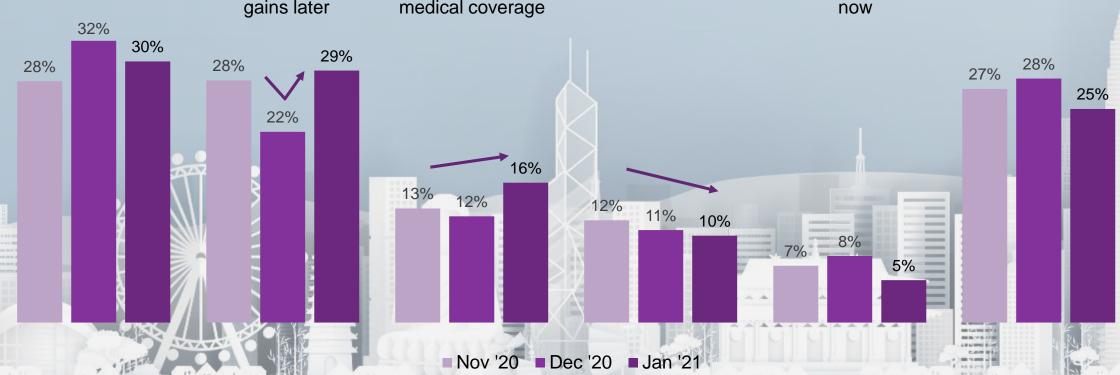
Investment Sentiment



I will not invest in anything and keep cash savings only

I invested/ plan to invest in stocks during the slump for potential gains later I plan to buy (more) protection products with savings, and medical coverage I plan to move abroad I invested/ plan to invest in properties as price has gone down

rested/ plan to I will do nothing



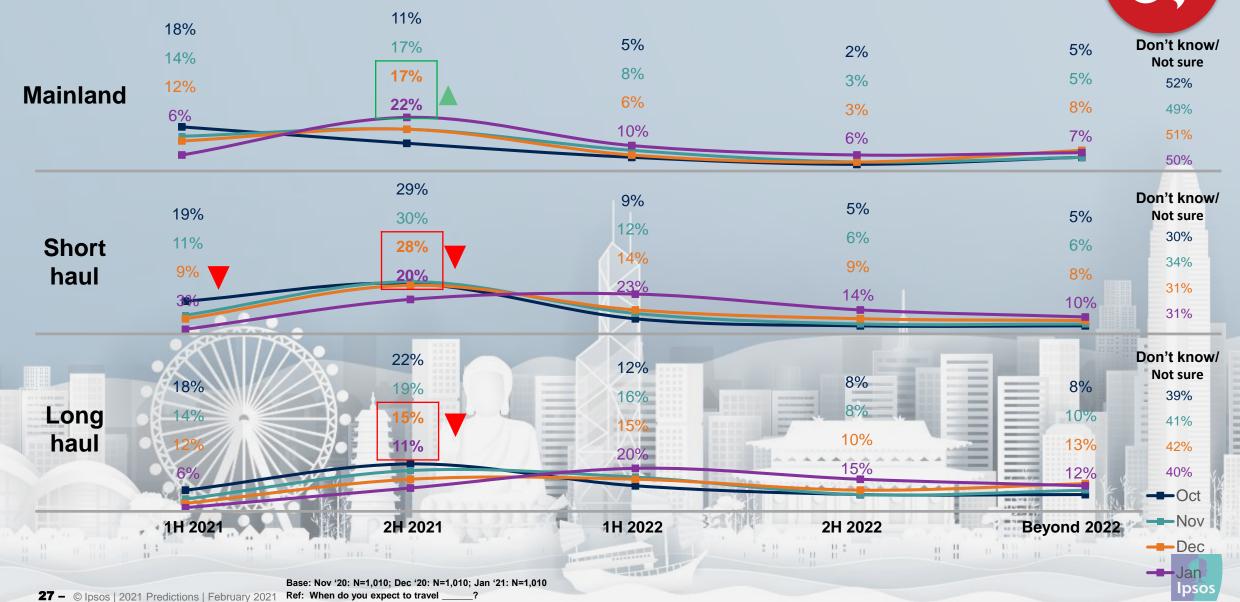
Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010

Ref: Please indicate how you plan for your investment and saving strategy during current social and economic situation.



Prolonged pandemic defers travel plans further





Digital Adoption

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Used mobile payment to avoid necessary contact

Used a banking app/mobile site

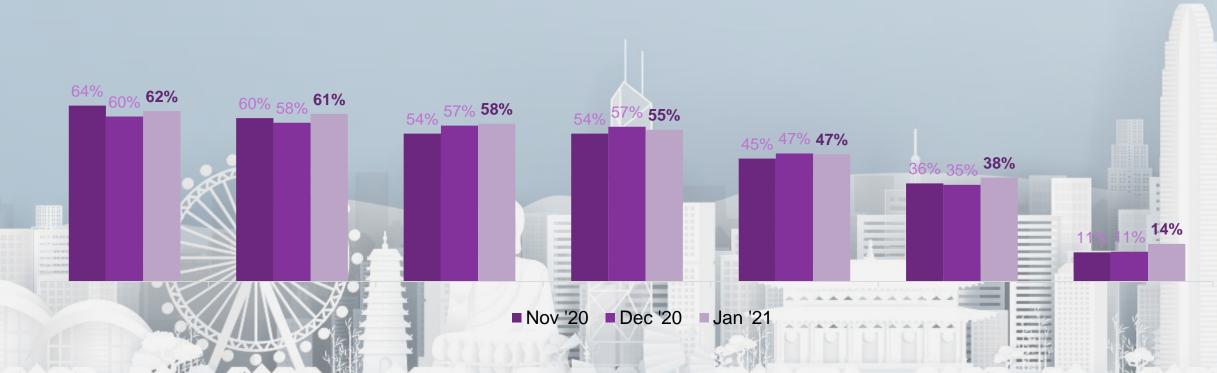
Spent time on social media

Spent time browsing online shopping platforms

Used a streaming service for watching shows, movies

Downloaded a game on my smartphone

Downloaded a fitness/wellbeing app/watched related videos online



Base: Nov '20: N=1,010; Dec '20: N=1,010; Jan '21: N=1,010

Ref: Have you done any of the following over the past 4 weeks? Please select all that apply...

PERSONAL & GLOBAL CHALLENGES





Market

Likely

Women will be paid the same as men for the same work

All markets 40% 51% Malaysia 73% 20% China 70% 25% India 61% 32% Hong Kong 58% 31% 51% Singapore 41% South Korea 55% 37% Australia 36% 55% New Zealand 32% 57% Japan 28% 56%

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.



% Likely

2018

42%

73%

65%

68%

NA

NA

36%

37%

NA

29%

2019

44%

68%

61%

71%

62%

51%

42%

37%

NA

36%

Unlikely



Market

Likely

Average global temperatures will increase

All markets 75% 15% Singapore 87% 8% China 84% 11% South Korea 84% 14% Hong Kong 83% 12% Malaysia 80% 12% **75%** 13% Japan New Zealand 71% 18% Australia 69% 20% India 66% 26%

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.



% Likely

2018

78%

NA

81%

84%

NA

88%

76%

NA

72%

79%

2019

77%

86%

79%

85%

83%

82%

79%

NA

70%

78%

Unlikely



People in my country/ city will become more tolerant of each other

Unlikely Market Likely All markets 29% 61% China 80% 15% Malaysia 69% 24% India 53% 35% New Zealand 44% 43% Singapore 40% 50% Hong Kong 31% 57% Australia 29% 58% South Korea 21% 74% 13% 68% Japan





Police in my country/ city will treat all people equally regardless of their differences

Unlikely Market Likely All markets 33% 56% China 68% 27% Singapore 62% 28% Malaysia 54% 36% New Zealand 48% 39% India 45% 45% Australia 40% 50% Hong Kong 28% 61% 22% Japan 55% South Korea 22% 72%





Market

Likely

I will feel lonely most of the time

All markets 31% 59% 50% Malaysia 43% 45% China 55% India 39% 50% Hong Kong 38% 57% Singapore 38% 56% South Korea 34% 61% Japan 27% 54% Australia 26% 66% New Zealand 22% 70%

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.



% Likely

2018

31%

38%

43%

32%

NA

NA

34%

31%

28%

NA

2019

33%

45%

47%

50%

41%

34%

33%

32%

30%

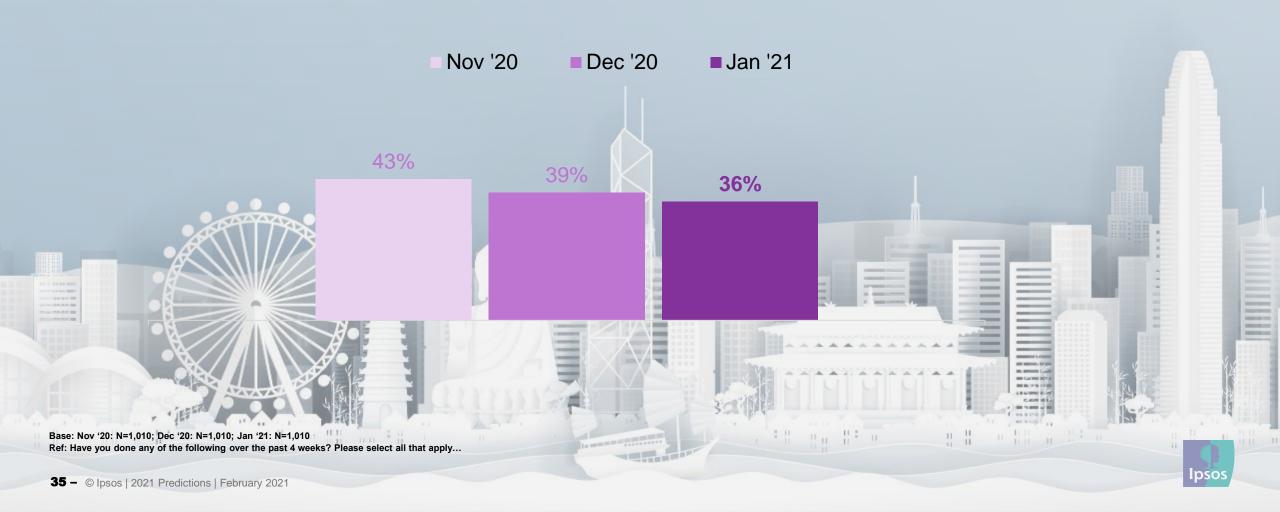
NA

Unlikely

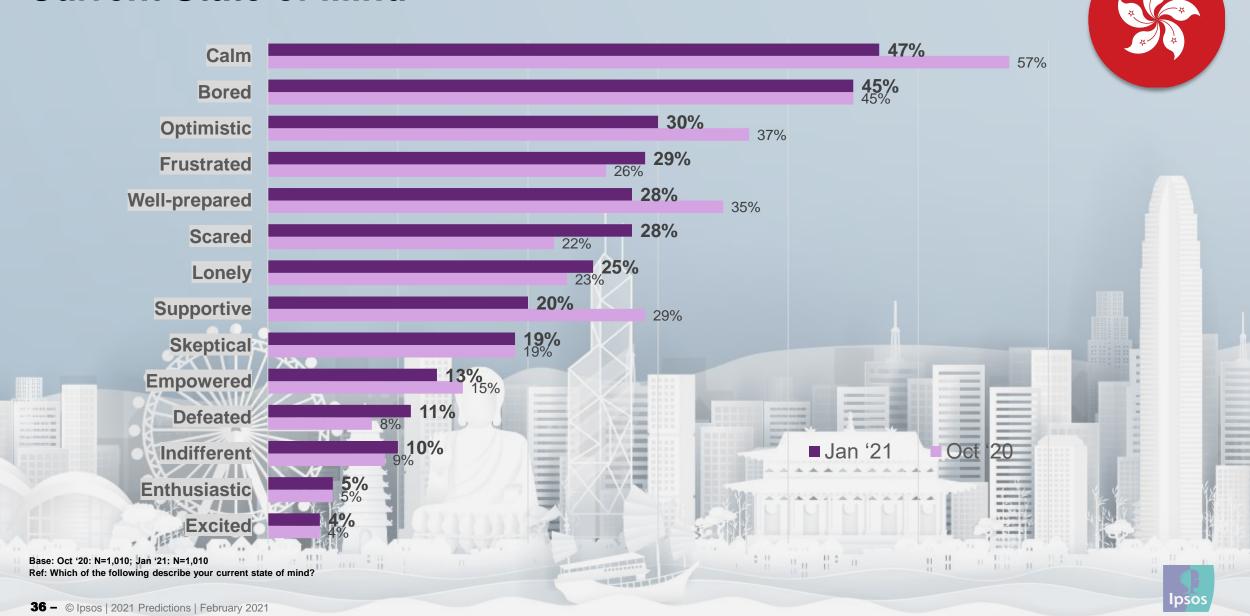
I have socialized with friends and family in person



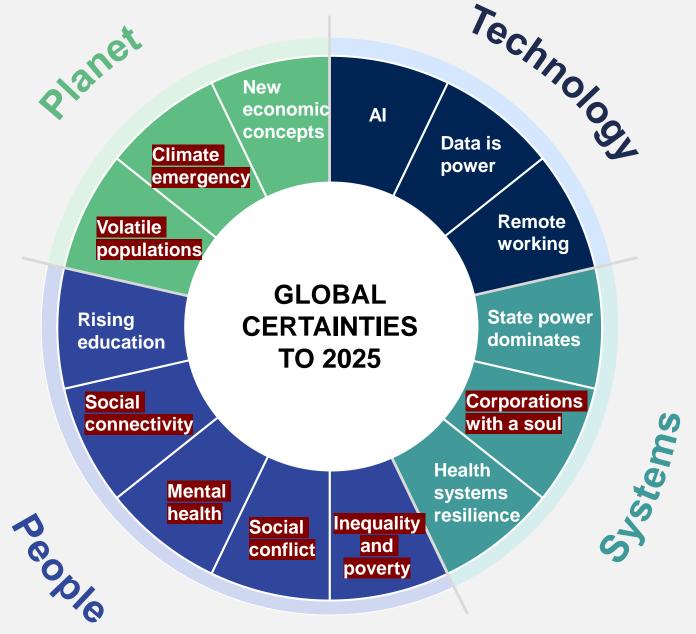
PAST 4 WEEKS INCIDENCE



Current State of Mind



These things are certain







Market

Likely

Robots will look like, think like and speak like humans

All markets 36% 52% Malaysia 57% 34% Singapore 56% 33% India 55% 35% Hong Kong 49% 39% South Korea 48% 45% China 40% 52% Japan 30% 55% Australia 28% 59% New Zealand 28% 60%

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020.



Unlikely

