

October 2, 2020

## Hakuhodo Institute of Life and Living ASEAN's Survey of ASEAN *Sei-katsu-sha*'s

### Attitudes to COVID-19

- **My life changed, I am concerned about COVID-19 extending both score around 90%**
- **Criteria for choosing companies and brands have changed**
  - Choose brands/companies that show they are taking anti-infection measures in an easy-to-understand way: 85%
  - Over 80% choose companies and brands that support health care professionals
- **Accepting the new normal vs. Wanting to go back to how things were before COVID-19**
  - In all items, Want to go back to how things were (pre-COVID-19) tops 50%
- **Top technology respondents want to embrace in future: Working from home**

Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN), in July conducted an internet survey on changes in attitudes and behavior of *sei-katsu-sha* in six ASEAN countries (Thailand, Indonesia, Singapore, Malaysia, Vietnam and Philippines). The following is a summary of the findings of the Survey of ASEAN *Sei-katsu-sha*'s Attitudes to COVID-19.

At the time of the survey (July 2020), new infections of COVID-19 were stable in Thailand, Vietnam, Singapore and Malaysia, and once again commuting to work and school, and going out and going shopping, people were returning to their old lives while incorporating new normal lifestyle habits. In Indonesia and the Philippines, however, daily infections were above 1,000, and the trying situation in which people faced a threat to their lives continued.

The results of the survey paint a typically ASEAN *sei-katsu-sha*-like picture. While most have had changes forced on their lives, they are conscious of social issues, choosing brands that make bigger contributions to medical personnel and others working to fight the pandemic, for instance, and they value interactions with others, wanting their relationships with their friends, partners and others to go back to how they were before COVID-19, even as they accept the new normal.

### Key changes in lifestyle attitudes and behavior

#### ■ Degree to which COVID-19 has impacted lives

- My life changed: 96%.
- 87% responded I am concerned about COVID-19 extending, for instance, through a second wave.

#### ■ COVID-19-related criteria for selecting companies and brands

- The top scoring items were Choose brands/companies that support health care professionals and organizations engaged in the battle with COVID-19 and Choose brands/companies that show they are taking anti-infection measures in a way that customers can easily understand (e.g., touchless thermometers/elevators) (both 85%). In addition, Choose brands/companies that use the latest technology in their anti-infection measures scored 83%.

### ■ About lives changed by COVID-19 (New normal vs. Pre-COVID-19)

- Comparing Want to embrace COVID-19-related changes (= prefer the new normal) and Want to go back to how things were before COVID-19 (= prefer pre-COVID-19) responses to emotion, behavior and other items, Want to go back to how things were before COVID-19 scored over 50% for every item.
- Items with high Want to go back to how things were before COVID-19 scores: Travel/Leisure, Relationships with friends, partner, Relationships with people around me, Child/ren's education  
Items with high Want to embrace and maintain COVID-19-related changes scores: Information gathering, Health, Relationships with family members, Mealtimes

### ■ Technologies they would like to utilize going forward due to COVID-19

- In technologies they want to utilize, Working from home scored highest (64%). However, since around 60% of respondents selected Prefer pre-COVID-19 in Work in the previous question, the likelihood of people exploring new ways of working or working from home and the workplace is high.

Hakuhodo Institute of Life and Living ASEAN is conducting various kinds of research into COVID-19, and has a reporting service (in Japanese, English and Thai) for companies that would like to grasp future changes in *sei-katsu-sha*. We look forward to hearing from interested companies.

### ■ Survey outline

#### Survey of ASEAN *Sei-katsu-sha*'s Attitudes to COVID-19

Respondents: Males and females 20–49  
Territories: Thailand, Indonesia, Singapore, Malaysia, Vietnam, Philippines  
Samples: 300 in each country, 1,800 samples total  
Survey method: Internet survey  
Survey period: July 10–13, 2020

### ■ About Hakuhodo Institute of Life and Living ASEAN

Established as an in-house think tank studying *sei-katsu-sha* in 2014, HILL ASEAN was incorporated in Thailand in March 2017. It supports clients' marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

Name: Hakuhodo Institute of Life and Living ASEAN  
Institute Director: Devi Attamimi  
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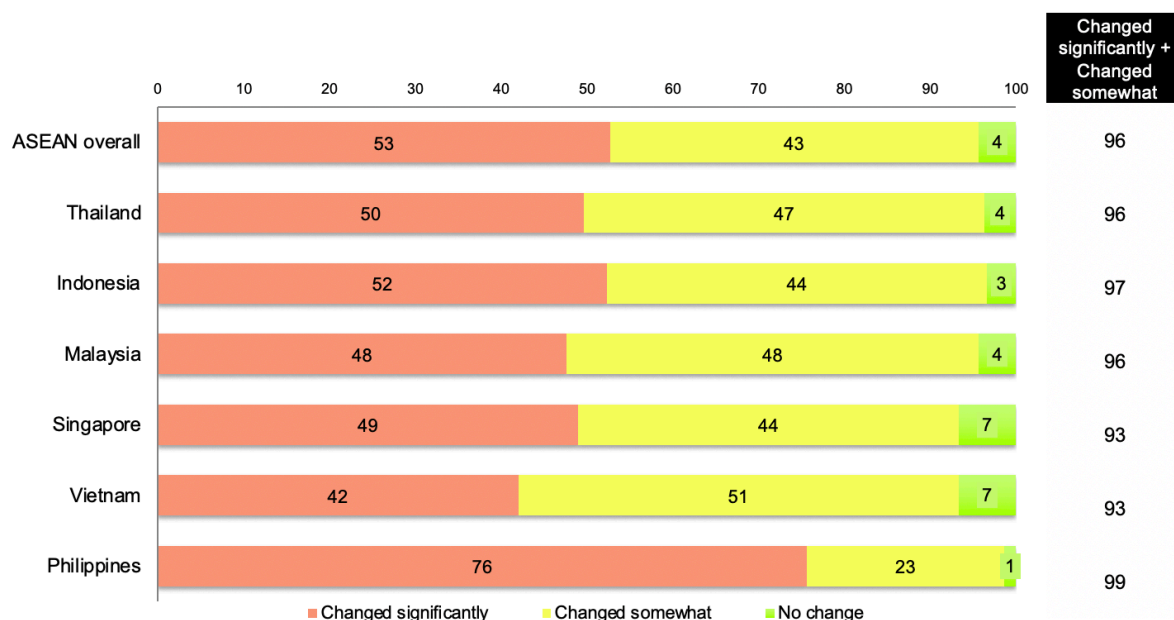
## Reference data (All values are percentages\*)

\* All values have been rounded to nearest whole number. As a result, there are discrepancies between the sums of the items and the overall figure in some instances.

### ■ Degree to which COVID-19 has impacted lives

- With 96% responding My life changed in ASEAN overall, it seems that the vast majority of respondents had changes forced on their lives. In the Philippines, the score for Changed significantly was a high 76%.

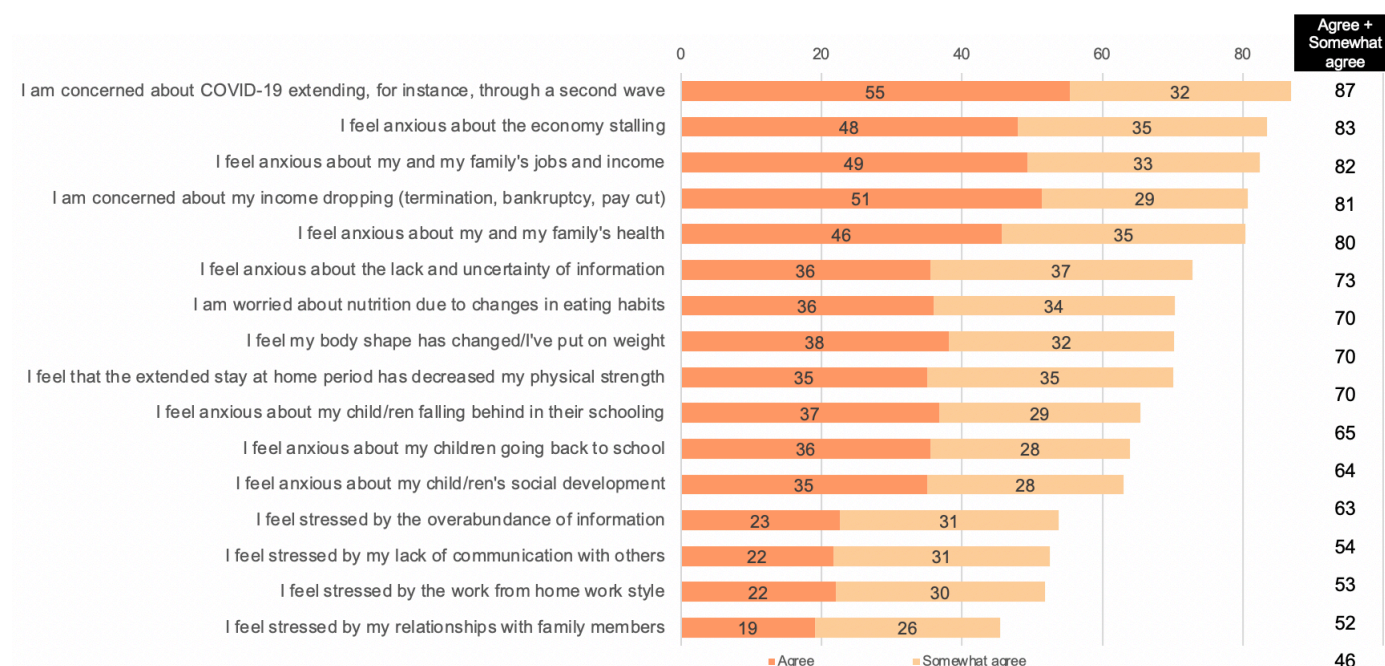
#### Q. To what degree did your life change due to COVID-19?



### ■ Anxieties and stress as COVID-19 spread

- 87% responded I am concerned about COVID-19 extending, for instance, through a second wave. Over 80% responded they feel anxious about the Economy stalling, My and my family's jobs and income, and My and my family's health, among other items.

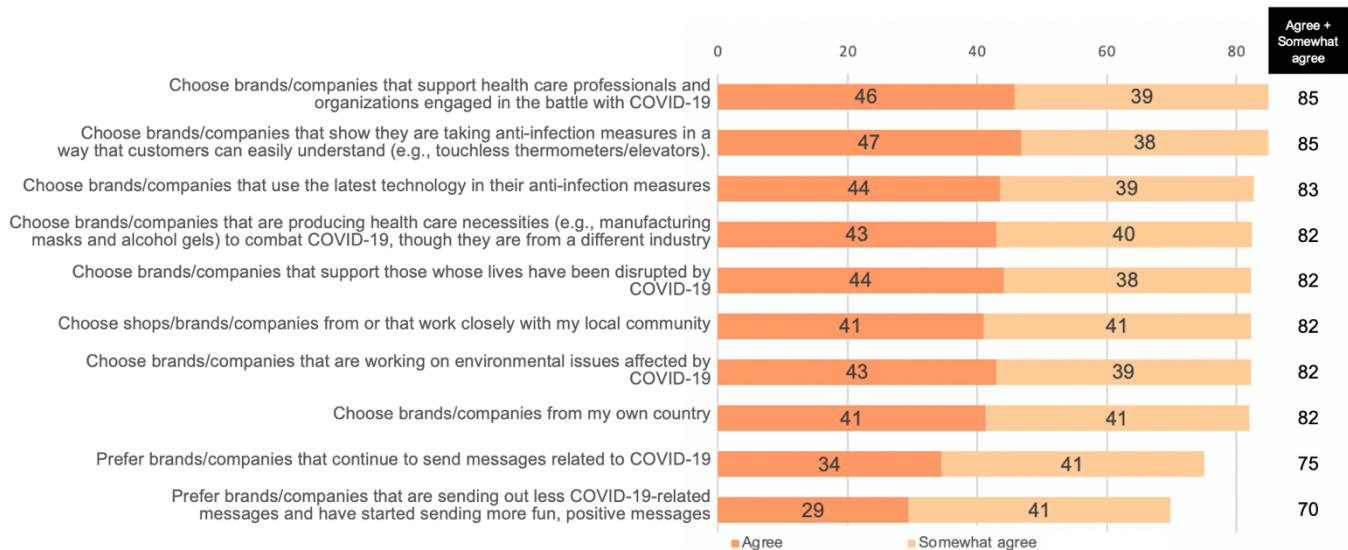
#### Q. Select the option that best matches your feelings/behavior.



## ■ COVID-19–related criteria for selecting companies and brands

The top scoring items were Choose brands/companies that support health care professionals and organizations engaged in the battle with COVID-19 and Choose brands/companies that show they are taking anti-infection measures in a way that customers can easily understand (e.g., touchless thermometers/elevators) (both 85%). In addition, Choose brands/companies that use the latest technology in their anti-infection measures scored 83%.

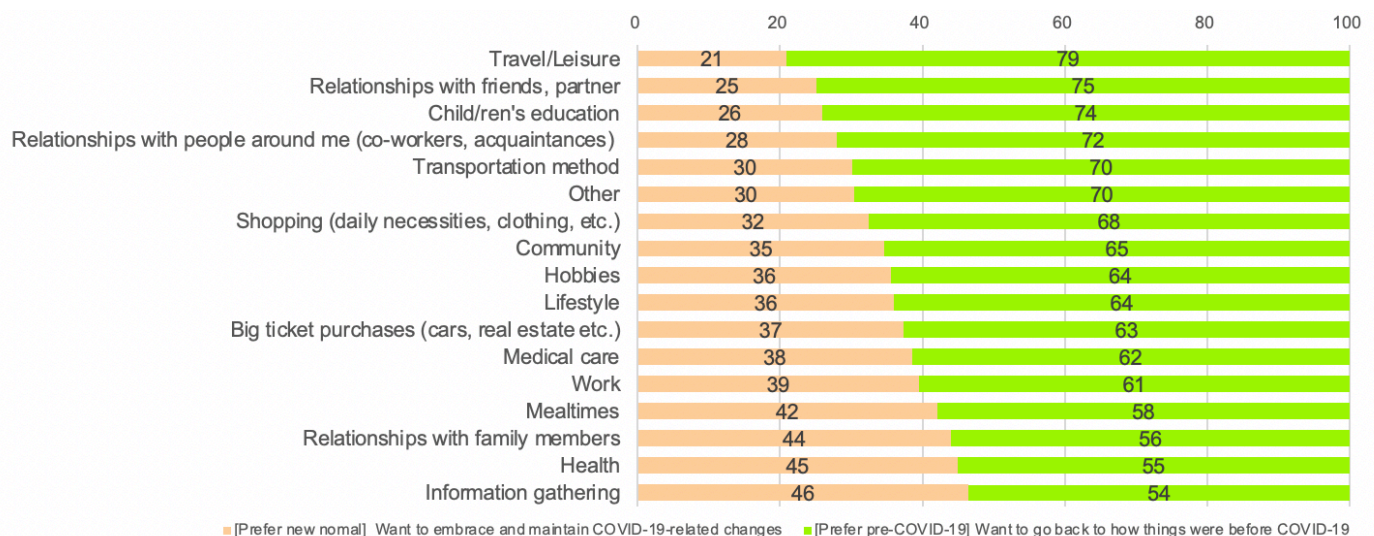
### Q. What companies' and brands' products and services are you choosing as a result of COVID-19?



## ■ About lives changed by COVID-19 (New normal vs. Pre-COVID-19)

- Comparing Want to embrace COVID-19–related changes (= prefer the new normal) and Want to go back to how things were before COVID-19 (= prefer pre-COVID-19) responses to emotion, behavior and other items, Want to go back to how things were before COVID-19 scored over 50% for every item.
- In particular, the preference for Want to go back to how things were before COVID-19 was over 70% for Travel/Leisure (New normal 21% : Pre-COVID-19 79%), Relationships with friends, partner (25% : 75%), Child/ren's education (26% : 74%), Relationships with people around me (28% : 72%), and Transportation method (30% : 70%).
- The preference for the new normal was high compared to other items in Information gathering (New normal 46% : Pre-COVID-19 54%), Health (45% : 55%), Relationships with family members (44% : 56%), and Mealtimes (42% : 58%), each of which scored over 40%.

### Q. Select the option that best matches your feelings/behavior with regard to items impacted due to COVID-19.



### ■ Technology they would like to utilize going forward due to COVID-19

- In technology they want to utilize, Working from home scored highest (64%). However, since around 60% of respondents selected Prefer pre-COVID-19 in Work in the previous question, the likelihood of people exploring new ways of working or working both from home and the workplace is high.

### **Q. New ways of living utilizing technology have appeared due to the impact of COVID-19. Select all items you would like to embrace or increase in future.**

