



[Intage Original Survey]

Confidential

ASEAN New Normal

<Quantitative survey>

How do we feel and act in the world
after the new coronavirus?

Capturing business opportunities after a game change



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June 22, 2020.
West Japan Branch
Center for Co-Creating the Future

Create Consumer-centric Values



- ① Key message
- ② The basic information
 - Actual situation of infected people with new corona in various countries
 - Basic information on each country
- ③ Research design
- ④ Health and hygiene
- ⑤ Food
- ⑥ Work and lifestyle (consumption)
- ⑦ Childcare & Beauty
- ⑧ Mobility
- ⑨ Values of consumers

① Key messages and suggestions for the New Normal

- ① **【Changes in the sense of distance between people and society】**
Reviews of the concept of distance from the people and society around you is underway.

【New Normal】

The evaluation of company's activities on social issues influences the choice of brand (product).

- ② **【Changes in clean consciousness】**
Generating and raising awareness of disease prevention and hygiene, the true value for importance of "health" is called into question.

【New Normal】

Take action to prevent getting sick for people around you.

IN: Behavior that enhances "immunity" from inside the body.

OUT: Action to enjoy "fashionable mask" for hygiene.

- ③ **【Changes in sense of time】**
The idea of time changes in proportion to the distance, and it becomes routine.

【New Normal】

Diversifying styles that face working, shopping, eating, socializing, and religion.

Shorter distance: remote work, delivery, EC

Longer hours: time for husband and wife, cooking time, urban farming

② Basic information about each country

'Basic information' for understanding the countries surveyed: population (city, country, composition), GDP per capita, religion

| | | | | | |
|---|--|--|---|---|---|
| | | | | | |
| Country | | | | | |
| Population (Unit: 1 million people) ※1 | 270.6 | 96.5 | 69.6 | 329.1 | 126.1 |
| Population of the city (Unit: 1,000 people) | JABODETABEK : 31,713 ※2 | Ho Chi Minh City : 8,598 Hanoi : 7,520 ※3 | Greater Bangkok : 11,562 ※4 | NY : 8,538 LA : 3,976 ※1 | 1 city and 3 prefectures (Tokyo, Kanagawa, Chiba and Saitama) 36,584 ※8 |
| GDP per capita: country (In U.S. dollars) ※1 | 3,847 | 2,342 | 6,595 | 60,055 | 38,402 |
| Population Composition (population pyramid) ※5 | <p>2020 人口 273,523,620</p> | <p>2020 人口 97,338,582</p> | <p>2020 人口 69,799,977</p> | <p>2020 人口 331,002,647</p> | <p>2020 人口 126,476,458</p> |
| Religion (rate) | Islam 87% Christianity 10% Others 3% ※6 | Buddhism 80% Others 20% ※2 | Buddhism 94% Islam 5% ※6 | Christianity 72% Others 10% No religion 18% ※7 | Shinto 48% Buddhism 47% Christianity 1% Others 4% ※1 |

※1 : Statistic Bureau <https://www.stat.go.jp/> ※2 : JETRO <https://www.jetro.go.jp/> ※3 : GENERAL STATISTICS OFFICE of VIET NAM https://www.gso.gov.vn/Default_en.aspx?tabid=491
 ※4 : Ministry of Land, Infrastructure, Transport and Tourism <https://www.mlit.go.jp/> ※5 : PopulationPyramid.net <https://www.populationpyramid.net/> ※6 : Ministry of Foreign Affairs <https://www.mofa.go.jp/mofaj/>
 ※8 : <https://news.gallup.com/poll/200186/five-key-findings-religion.aspx>

② Actual situation of infected people (Jakarta)

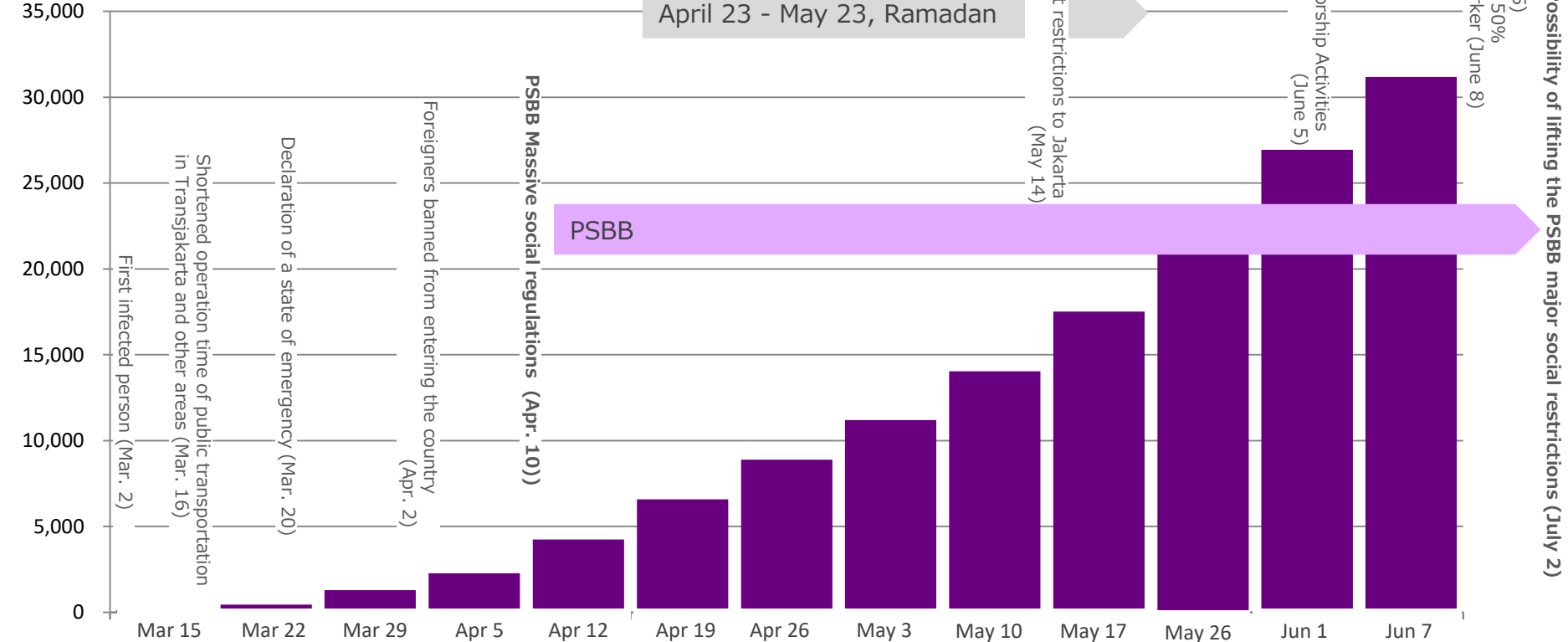


Special Capital Region of Jakarta

PSBB : Massive social regulations

- No lockdown
- Nightclubs, spas and cinemas closed, restaurants open for takeaway and delivery only
- Supermarkets are open as usual
- Limited use of private vehicles, no ride sharing
- The prohibition against working at workplaces and offices In principle.

(Number of people)



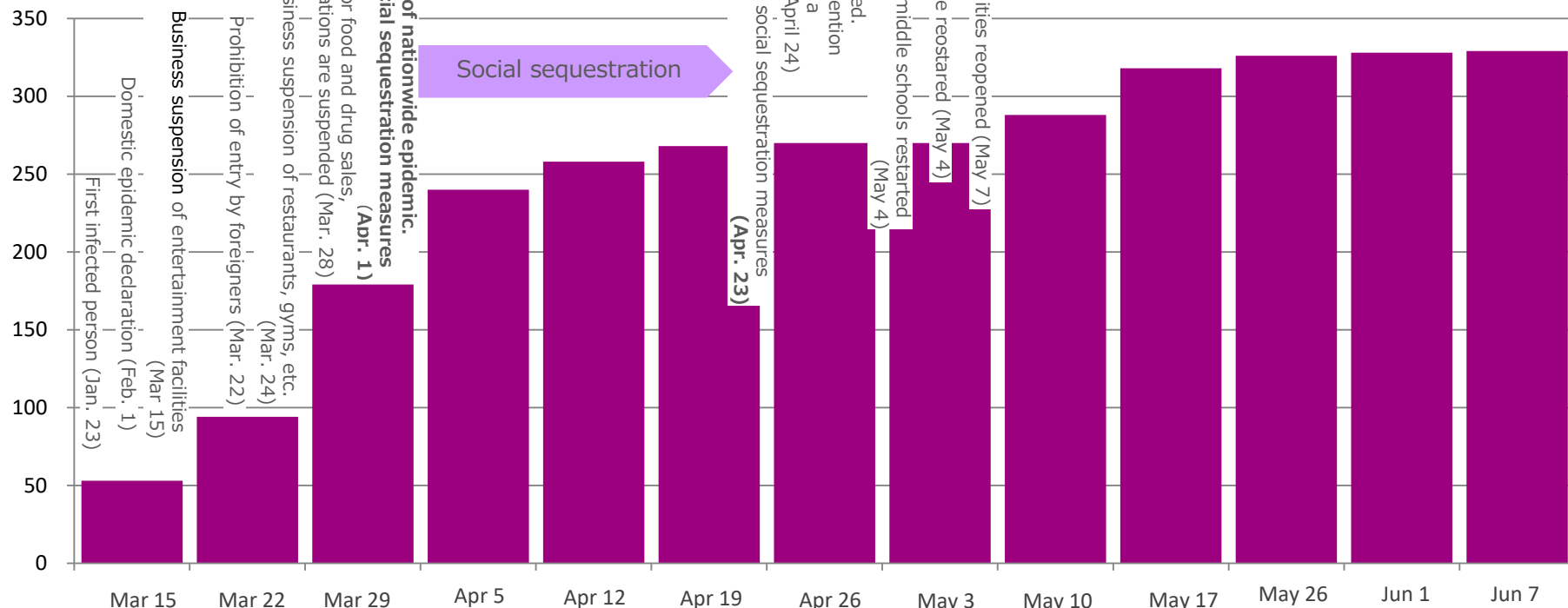


Ho Chi Minh City/Hanoi

Social sequestration measures

- Service businesses other than daily necessities, public transportation stopped and meetings restricted. It does not control the movement of people.
- The prohibition against passenger transport by public transportation in principle
- Stay at home unless it is urgent or truly necessary
- Recommended to work from home

(Number of people)



② Actual situation of infected people (Bangkok)

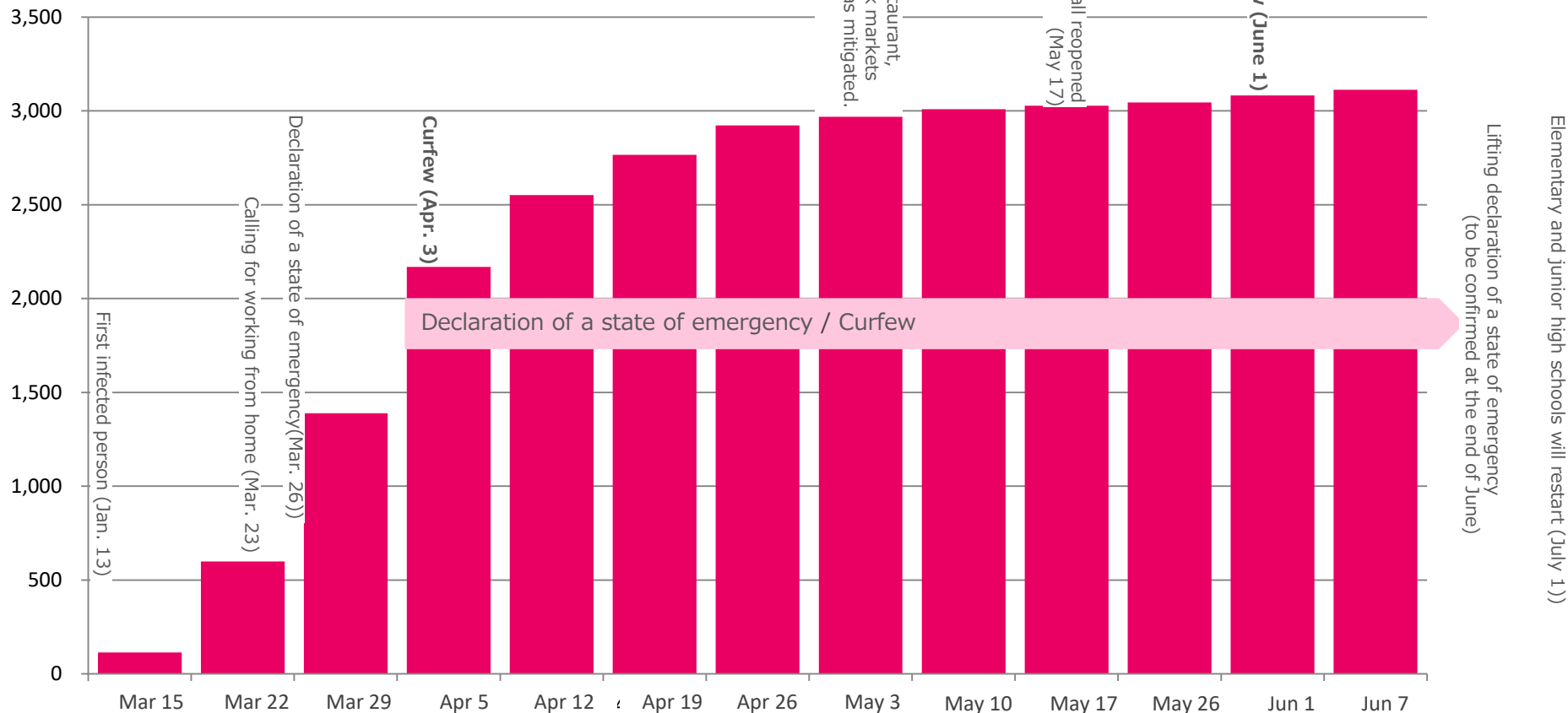


Bangkok

The curfew

- The curfew (From 10 pm to 4 am the next morning)
June 1 - after mitigation (from 11 pm to 3 am the next morning)
- BTS/MRT operates normally (a mask is required)

(Number of people)



② Actual situation of infected people (New York State, California)



State of New York and California

Stay at Home Order

- Closed nonessential and nonurgent business closed since 8pm on March 22.
- Limited public transportation is in operation.
- Going out to purchase necessities of life is allowed.
- Shopping malls shut down
- Dine-in (eating and drinking in the restaurant) is prohibited. Take-out and delivery are still allowed.
- Work from home except for the essential business.

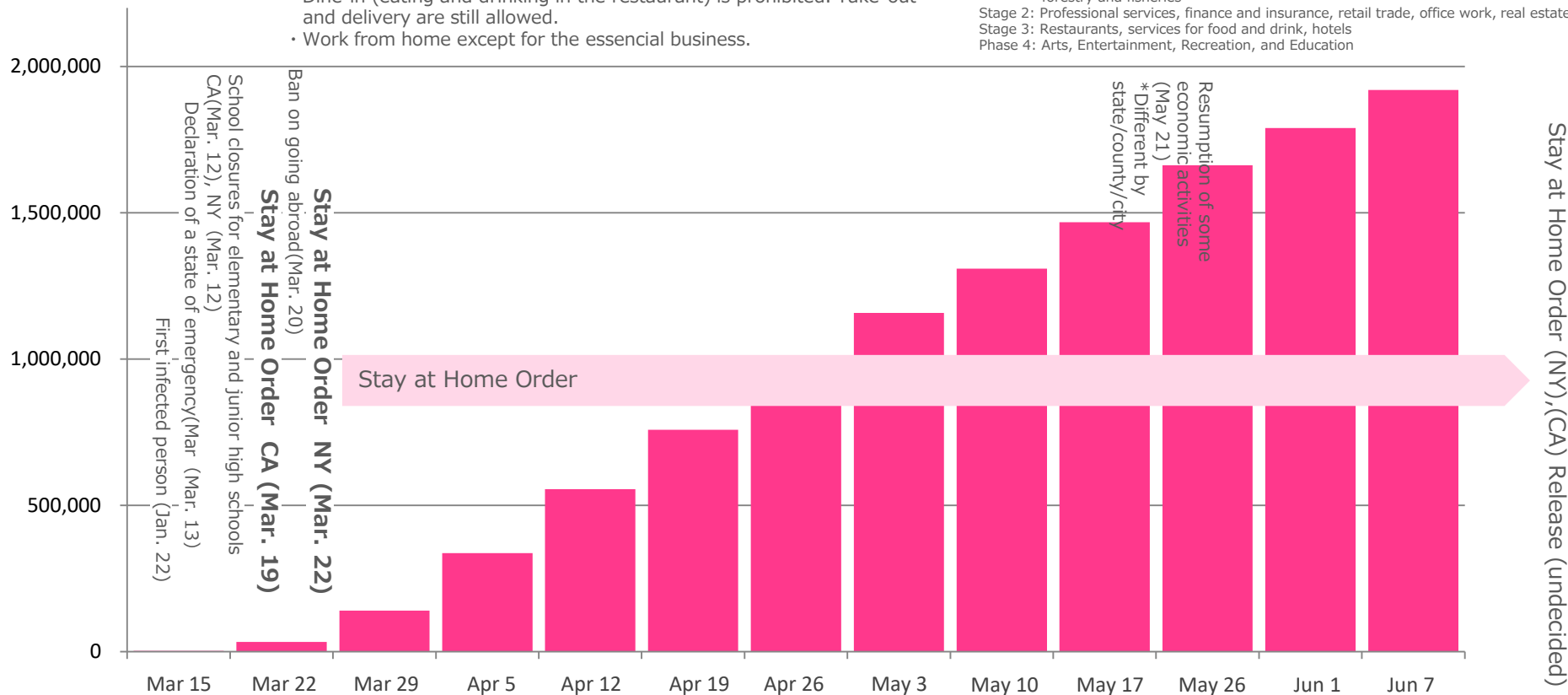
50 states have resumed economic activities by region with their own resumption plans

- *Different by state/county/city
- Recreational activities with a low risk of infection
 - Horticulture, landscaping, tennis, drive-through, movie theater
- Beach
- Religious events (less than 10 people)

Plans for future gradual easing

- Phase 1: Construction, manufacturing, wholesale and some retail trade, agriculture, forestry and fisheries
- Stage 2: Professional services, finance and insurance, retail trade, office work, real estate
- Stage 3: Restaurants, services for food and drink, hotels
- Phase 4: Arts, Entertainment, Recreation, and Education

(Number of people)



Stay at Home Order (NY),(CA) Release (undecided)

③ Survey design : Three methods (surveys) to capture changes.

Global Corona Influence

Living person

Current Situation

Surveying changes in life due to corona (past and present)

Quantitative survey (AMP)

Asian Panel

Quick and Decisive Insights

Changes

Changes in the number of social media statements due to Corona(A year ago and now)

SNS analysis

NETBASE

New Movements

Qualitative survey

inc Life Style RESEARCHER
ライフスタイルリサーチャー

Capturing changes in the lifestyles and values of people living in ASEAN

Business

After Corona

The results of "SNS analysis" and "qualitative research" are not included in the downloadable version.

Developing products and services in response to changes in consumer habits and values

③ Survey design : Countries and categories covered by the survey

Target country

Indonesia



Vietnam



Thailand ※



America



As a target country for expansion

※Quantitative only As advanced country

Survey Category

Health hygiene

Food

Work lifestyle

Childcare Beauty

Mobility

Values

Capturing “**Actual situation**”, “**Changes**” and “**New Movements**” with respect to six categories

Fact-finding survey for global total 3200 samples

| | | |
|---------------------|--|---|
| | Indonesia Vietnam (Ho Chi Minh City, Hanoi) Thailand | USA |
| Survey panel | AMP (mobile) | Web survey (P C) |
| Area | Indonesia : JABODETABEK Vietnam : Ho Chi Minh City, Hanoi Thailand : Greater Bangkok | Nationwide |
| Sample | Each country has 800 samples / 3200 samples in total (Vietnam has 400s in each city) | |
| Cell allocation | 400 samples for men and 400 samples for women | |
| | | Male Female |
| | Married • Couple, no kids | 130 s 130 s |
| | Married with kids (5 years old and below) | 130 s 130 s |
| | Married with kids (6 years old and above) | 140 s 140 s |
| Age | 20~49 years old | |
| Household income | SEC A,B | \$40,000 over / year |
| Number of questions | 30questions count Picture (optional) Including 1 | 30questions count Picture (optional) Including 1 |
| Survey period | Friday, May 1 - Thursday, May 7, 2020 | |



Asian Panel

Quick and Decisive Insights



③ Survey design : Quantitative Survey respondents attributes

Age and generation

Male/female 20-49 years old, and many millennials also collected

| (%) | TOTAL | USA | TH | VN | IDN |
|--------------------------------|-------|------|------|------|------|
| TOTAL | 3327 | 836 | 824 | 838 | 829 |
| Male 20 - 24 yo | 3.8 | 1.6 | 1.2 | 9.7 | 2.8 |
| Male 25 - 34 yo (millennial) | 18.6 | 15.9 | 12.9 | 22.9 | 22.7 |
| Male 35 - 49 yo | 27.4 | 32.3 | 35.6 | 17.1 | 24.7 |
| Female 20 - 24 yo | 3.5 | 1.3 | 2.1 | 7.5 | 3.0 |
| Female 25 - 34 yo (millennial) | 21.3 | 18.4 | 18.2 | 24.5 | 24.0 |
| Female 35 - 49 yo | 25.4 | 30.5 | 30.1 | 18.4 | 22.8 |
| 20 - 24 yo | 7.3 | 2.9 | 3.3 | 17.2 | 5.8 |
| 25 - 34 yo (millennial) | 39.9 | 34.3 | 31.1 | 47.4 | 46.7 |
| 35 - 49 yo | 52.8 | 62.8 | 65.7 | 35.4 | 47.5 |

Family structure

Based on marriages, from no children to with children (analysis can also be done by age of youngest child)

| (%) | TOTAL | USA | TH | VN | IDN |
|--------------------------------------|-------|------|------|------|------|
| Married, w/o kids | 1073 | 25.3 | 24.9 | 25.0 | 24.9 |
| Married, with kids (3 yo and below) | 686 | 23.2 | 22.3 | 28.0 | 26.5 |
| Married, with kids (11 yo and below) | 1140 | 24.5 | 24.2 | 25.6 | 25.7 |
| Married, with kids (12 yo and above) | 428 | 29.7 | 29.9 | 20.1 | 20.3 |

Household income ※Indonesia outgo

Classify income into three groups: high income, middle class and low income

| | | |
|--------------|--|-------|
| U S A YHI | High income \$160,000+ /year | 14.1% |
| | Middle | 67.9% |
| | Low income Below \$60,000 /year | 17.9% |
| T H MHI | High income 120,000THB+ /month | 14.8% |
| | Middle | 58.1% |
| | Low income Below 50,000THB /month | 27.1% |
| V N MHI | High income 45,000,000VND+ /month | 16.1% |
| | Middle | 64.7% |
| | Low income Below 15,000,000VND /month | 19.2% |
| I D N MHE | High expense 10,000,001RP+ /month | 12.8% |
| | Middle | 68.9% |
| | Low expense 3,000,000RP and below /month | 18.3% |

Occupation

Analysis from office workers and other industries

| (%) | TOTAL | USA | TH | VN | IDN |
|--|-------|------|------|------|------|
| Office worker | 45.4 | 27.4 | 56.2 | 43.0 | 55.5 |
| Other than office worker | 40.5 | 39.7 | 37.4 | 53.8 | 31.1 |
| Housewife, unemployed, student, others | 14.0 | 32.9 | 6.4 | 3.2 | 13.4 |

4.

【Actual situation / Changes】

- Important to stay clean (disinfection, cleaning, laundry, showering) (IDN)
- Government, religion and society work together on hygiene. (IDN)
- The movement to ban the use of eco-bags. The movement that disregards conventional habits and environmental awareness. (US)

【Remaining / New Movements】

- Rapid expansion of medical technology such as online (remote) medical/robot (VN/IDN/US)
- COVID-19 hygiene behavior (prevention of epidemics, avoiding crowds) remains
- Masks have become standard with the entry of various industries, have become a fashionable item. (VN/US)

**Health
hygiene**

④ “Actual situation” and “Changes” in hygiene / health <Quantitative survey>

[Actual situation]

● **Hand washing** frequency averages about 8 times a day ,
hand disinfection frequency averages about 5 times a day. (Q 7, Q 8) (NA)

—In Vietnam, the frequency of hand washing and hand disinfection is about 4 times a day,
 lower than other countries due to lack of the "hand washing habit" from the past.

—In Indonesia, the frequency of hand disinfection is as low as 4.7 times, and alcohol is permitted for Muslims,
 but it's still possible that the spread and supply is slow.

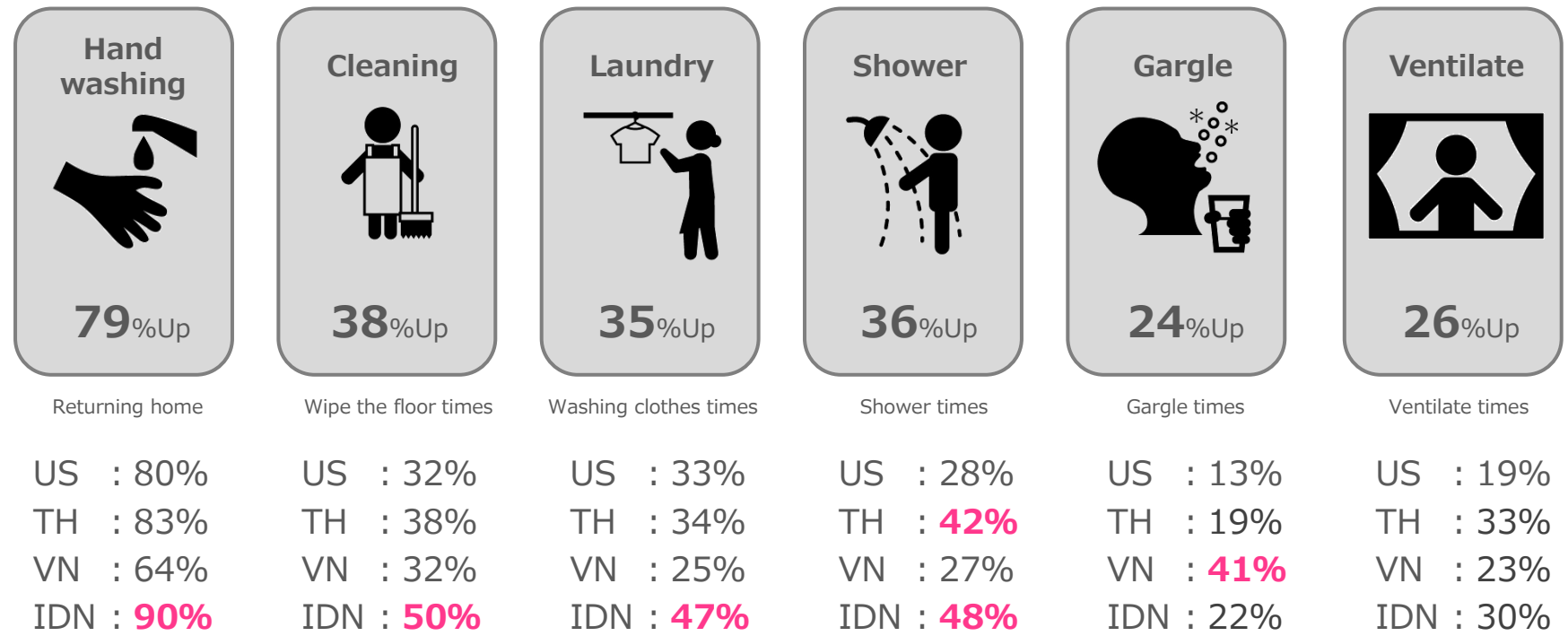


[Actual situation]

● Increased preventive actions in Corona (Q 9) (MA)

About 80% of respondents in each country answered an increase in the number of times they wash their hands (eating, returning home, and after using the toilet)

In Indonesia, behavioral changes related to "staying clean" have been observed, such as increased use of room cleaning and laundry.



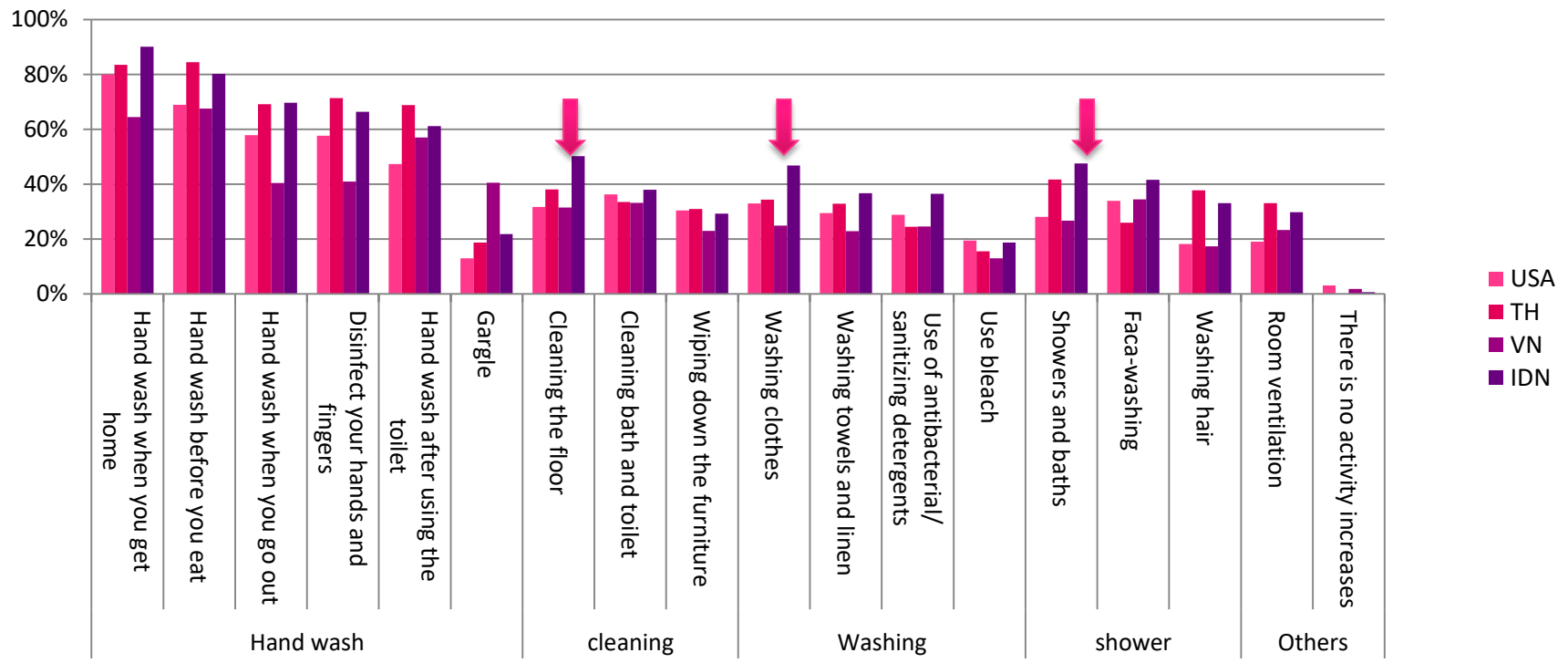
TTL

4 "Actual situation" and "Changes" in hygiene / health <Quantitative survey>

[Actual situation]

● Increased preventive actions in Corona (Q 9) (MA)

- In Vietnam, 41% of people have increased "the number of gargles".
- In Indonesia and Thailand, about 40% increased "the number of showers".
- In Indonesia, 47% have increased "the number of washing clothes".
- In Indonesia about 50% have increased "the number of room cleaning".



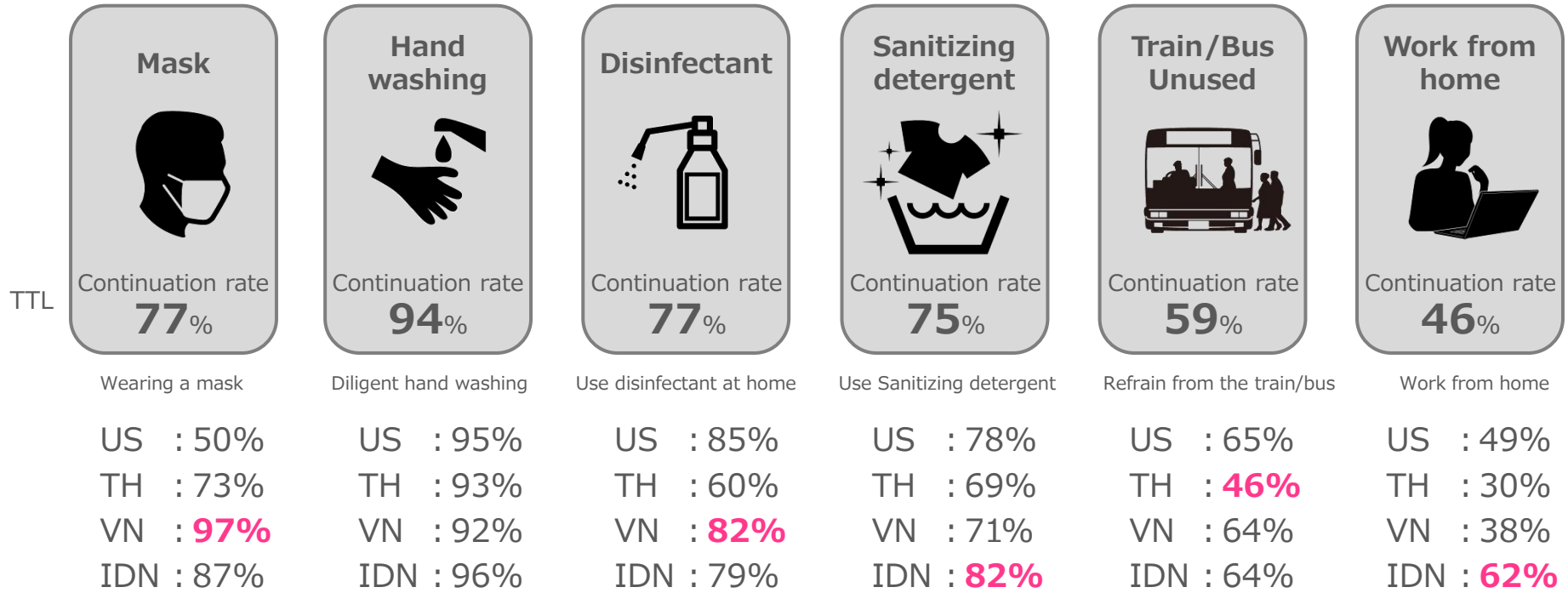
[Changes]

● **Changes in preventive behavior / What will remain? (Q6)** (MA)

In Indonesia and Vietnam, having high rates of mask continuity.

Diligent hand washing and sanitizing practices remain in each country.

Continuation rate=Future actions / Current actions

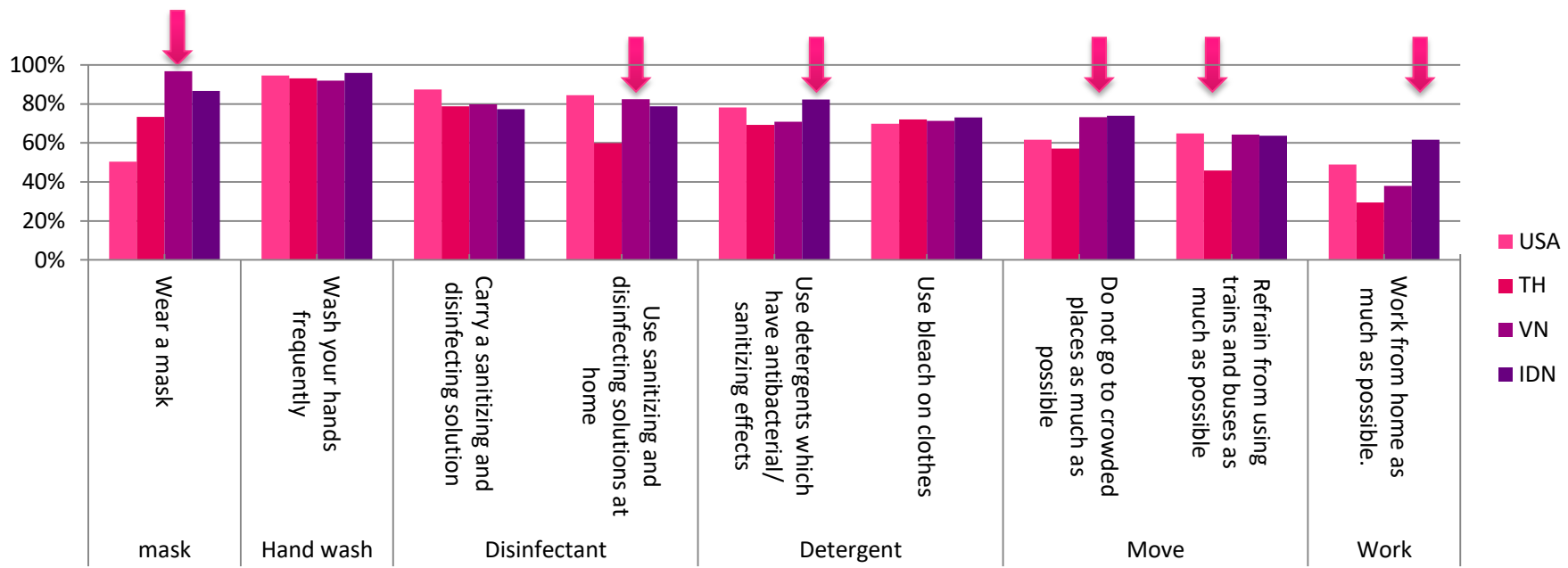


[Changes]

● Changes in quarantine behavior / What will remain? (Q6) (MA)

- In Indonesia and Vietnam, continue to avoid public transportation and crowd.
- In Thailand, tends to go back to the original way of life (public transportation, crowd).
- In US and Indonesia, remains using "detergent" with sanitization effective.
- In Indonesia, remains in the habit of working from home (62% continuation rate) > work-style reform

Continuation rate=Future actions / Current actions





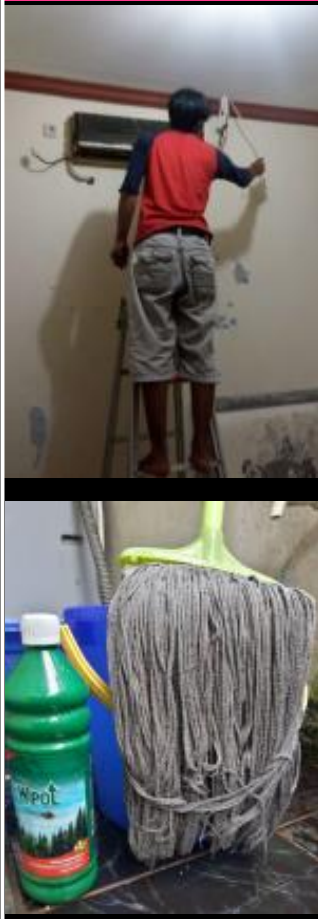
4 "Actual situation" and "Changes" in hygiene / health <Quantitative survey>

In Indonesia, asked to "buy after the epidemic of the new coronavirus and send me your favorite photos", then we got photos of diseases control products, cleaning supplies, electrical appliances, and cooking appliances.

Diseases control products



Cleaning



Electrical appliances



TINGKATKAN HIDUP SEHAT DENGAN HONEYWELL AIR PURIFIER

Segala hal yang baik untuk L17 / L15, apabila menggunakan 3 gejala di bawah ini:

- HAJIR
- BAKAR
- DEKAT

Penjernih udara dengan cakupan area 4-40m²

DISKON PRICED Rp 6.499.000

MAU HARGA SPECIAL?? DM Sekarang yah... OFFER

NET PRICE Rp. 4.499.999

Contact : Andri Lim / 08170934501

5.

Food

【Actual situation / Changes】

- Eating at home is noticeable and the only country where delivery has declined (IDN)
- Tendency to seek for food with safety and nutrition. (IDN)
- Attracting attention to traditional herbal medicine "Jamu" (IDN)

【Remaining / New Movements】

- Food delivery goes from expansion to new normal. (TH/VN)
- "Food / Foodstuffs" - the form of support (assistance) for small and medium-sized businesses is firmly established. (US)
 - ~Restaurant closures lead to an increase in self-catering and the birth of a new food delivery service
- With the increase in self-catering, recipe search and EC-linked services are popular. (US)

⑤ “Actual situation” for Food <Quantitative Survey>

[Actual situation]

● Changes in eating habits (Q13) (SA)

Shift to Self-catering in each country.

In Indonesia, takeaways and deliveries are decline especially noticeably.

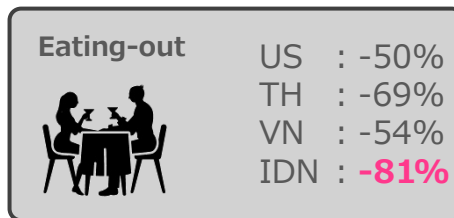
Delivery increased in Thailand and Vietnam.

- The number of self-catering has increased by 70% or more in the US, Thailand and Indonesia.
- 81% fewer people eat out in Indonesia.
- Both takeaways and delivery decreased in Indonesia.
- Number of deliveries increased in Thailand and Vietnam (73% in Thailand)
- In Thailand, 63% of people have increased use of instant food.
- In Indonesia, the number of missed meals decreased due to an increase in self-catering.

Rate of change = (Increaser-Deceaser)/Parameter
※Number of times

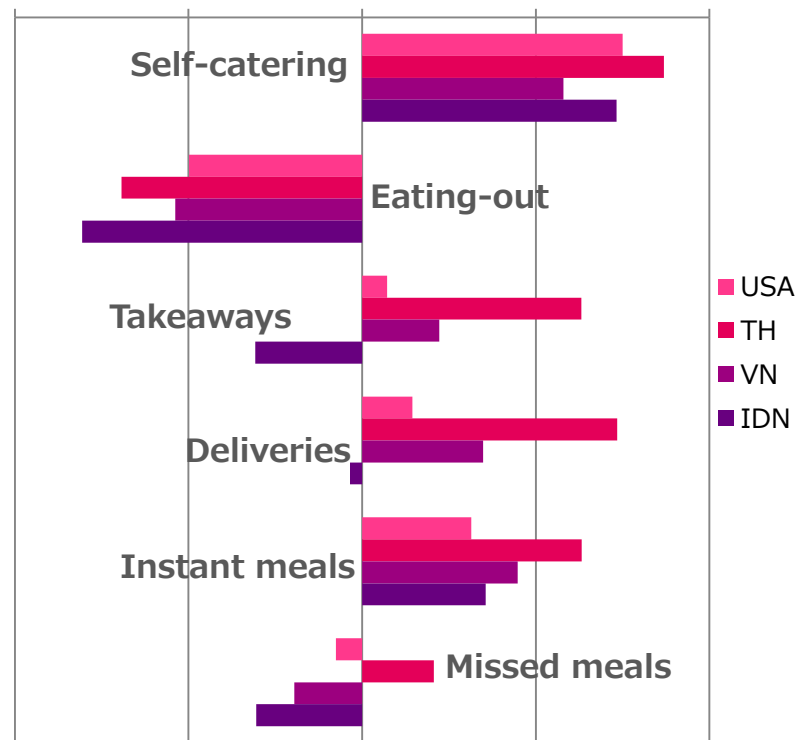
Increase

Decrease



※Number of times

-100% -50% 0% 50% 100%

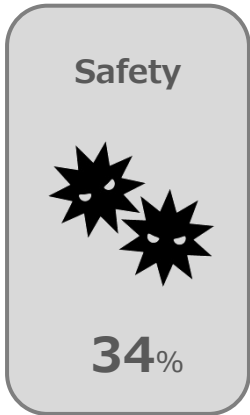


[Actual situation]

● Issue and needs for cooking/recipe (Q14) (MA)

In Indonesia, the shift to self-catering is remarkable, and new needs for cooking/recipe are emerging along with hygiene concerns.

TTL



Worrying about a virus on the food ingredients

| | |
|-----|--------------|
| US | : 25% |
| TH | : 28% |
| VN | : 28% |
| IDN | : 56% |



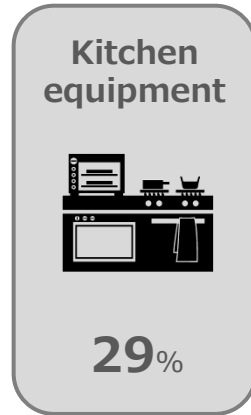
Nutritional concerns with the use of instant foods

| | |
|-----|--------------|
| US | : 18% |
| TH | : 32% |
| VN | : 31% |
| IDN | : 48% |



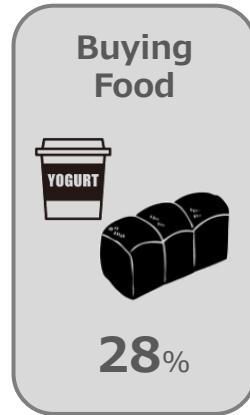
The menu is always the same

| | |
|-----|--------------|
| US | : 18% |
| TH | : 46% |
| VN | : 22% |
| IDN | : 34% |



The refrigerator is too small to store food

| | |
|-----|--------------|
| US | : 24% |
| TH | : 33% |
| VN | : 29% |
| IDN | : 29% |



I can't go shopping for food.

| | |
|-----|--------------|
| US | : 21% |
| TH | : 23% |
| VN | : 24% |
| IDN | : 42% |



Not enough seasoning

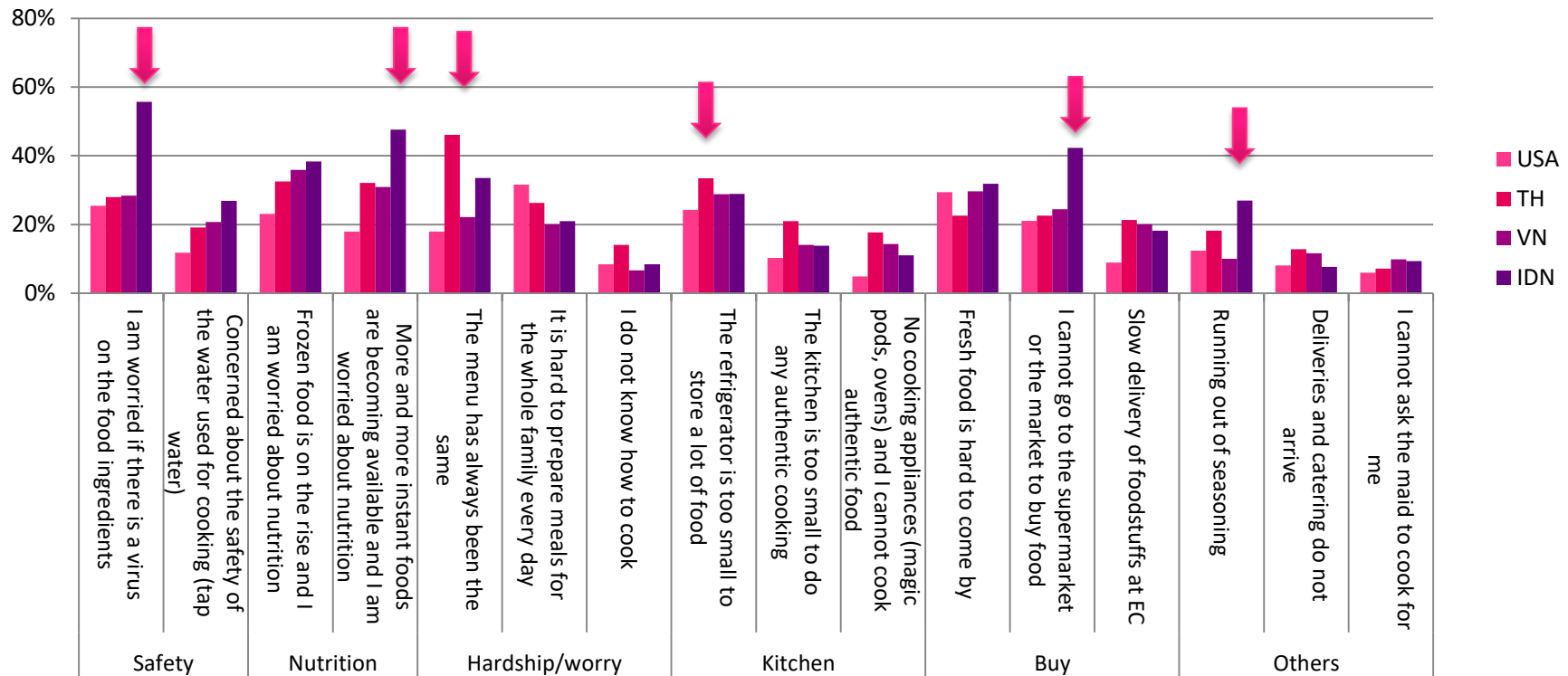
| | |
|-----|--------------|
| US | : 12% |
| TH | : 18% |
| VN | : 10% |
| IDN | : 27% |

5 “Actual situation” for Food <Quantitative Survey>

[Actual situation]

● Issue and needs for cooking/recipe (Q14) (MA)

- More bulk buying in each country will lead to greater needs for large refrigerators (29% of respondents identified this as an issue)
- Monotony of menus is an issue in Thailand and Indonesia (Thailand: 46%)
- In Indonesia, hygiene awareness is on the rise, as can be seen in ①, and the needs are higher than in other countries for food contamination (56%) and anxiety about water for cooking (27%).





5 "Actual situation" for Food <Quantitative Survey>

You can see how they buy food and cook for themselves.

Food and Seasonings



Self-catering meals



5 "Actual situation" for Food <Quantitative Survey>

You can see how they buy food and cook for themselves.

Vitamins, "Jamu" - and other traditional supplements

Traditional Supplements (JAMU)

Chinese medicine

Vitamin

Nutrition Drink





5 "Actual situation" for Food <Quantitative Survey>

You can see the abundance of delivery (gyoza, Japanese bento, local food...)



Instant food



Delivery

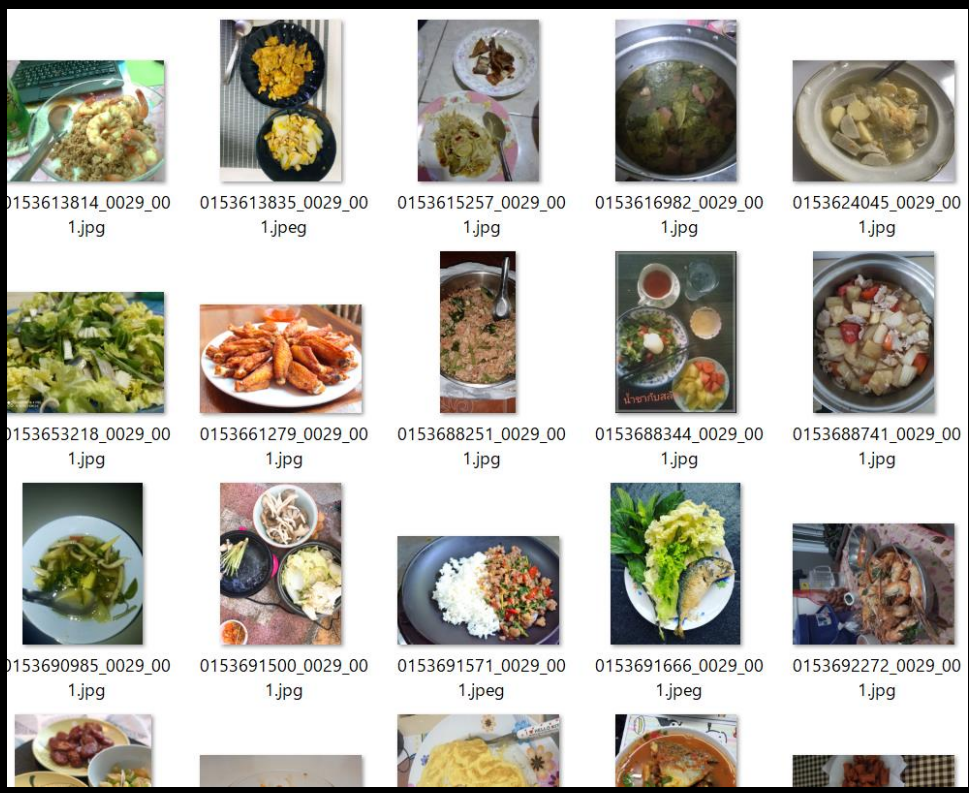


5 "Actual situation" for Food <Quantitative Survey>

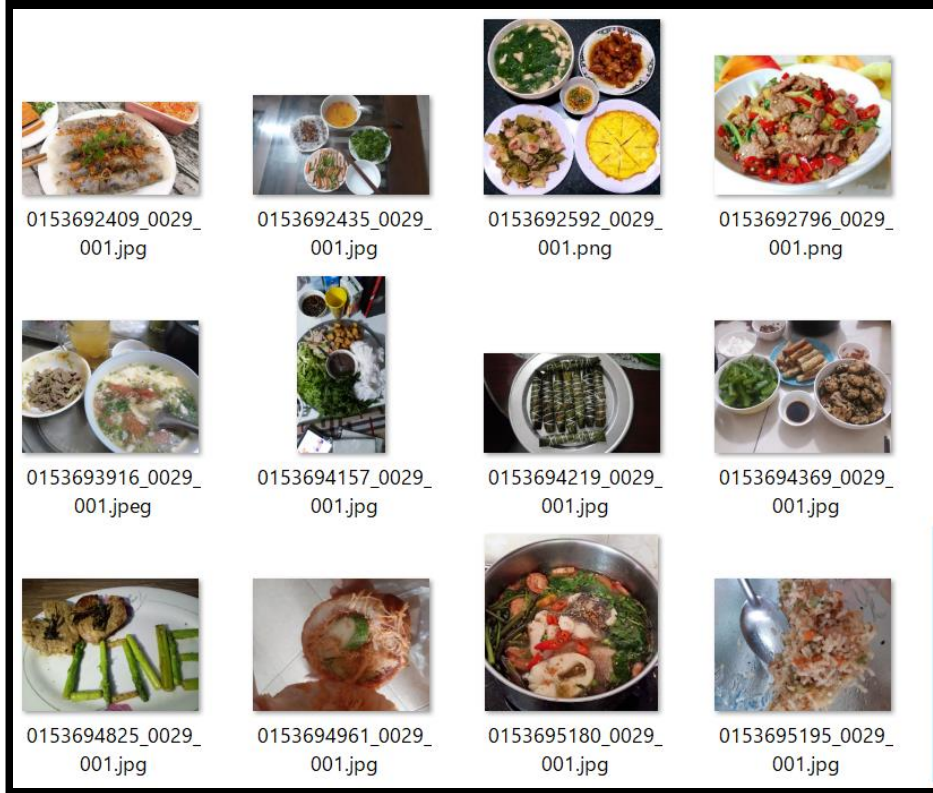
Self-catering in Thai seems to be not as monotonous as it is self-reported, but it seems that Vietnam is more elaborate and the number of items is large.



Homemade food



Homemade food





5 "Actual situation" for Food <Quantitative Survey>

Perhaps there were more opportunities for self-catering in Indonesia, and there were many photos and images shared about appliances and goods for cooking.

Cooking appliances & Goods



SARUNG TANGAN
TAHAN PANAS
4.500
1 PCS BHN KANVAS



VIENTA
Food Processor

- Chopping** Memotong berbagai bahan makanan (memotong French fries, dll)
- Mixing** Menghaluskan bahan makanan untuk membuat jus buah/sayuran
- Cake mixer** Mengguk adonan untuk membuat kue, dll
- Blending** Memotong/menghaluskan, membuat lenggi shopping, menghaluskan daging, dll
- Grind** Memecahkan bahan makanan/hewanian yang amas untuk membuat aneka jenis hidangan seperti susu kedelai, santan, dll
- Whisking** Menghaluskan telur/bahan-bahan lain kue
- Food Processor** Memecah-belah bahan makanan
- Food Processor** Memecah-belah bahan makanan
- Food Processor** Mengguk bahan makanan
- Food Processor** Membuat jus buah

Masak apapun jadi lebih MUDAH



6.

Work-style /Lifestyle

【Actual situation / Changes】

- Teleworking implementation rate of office workers 69%
- Increasing employment diversification (job changes, side jobs) (VN、 IDN)
- Increased time with spouse and children
- Increased time for religious acts (IDN)

【Remaining / New Movements】

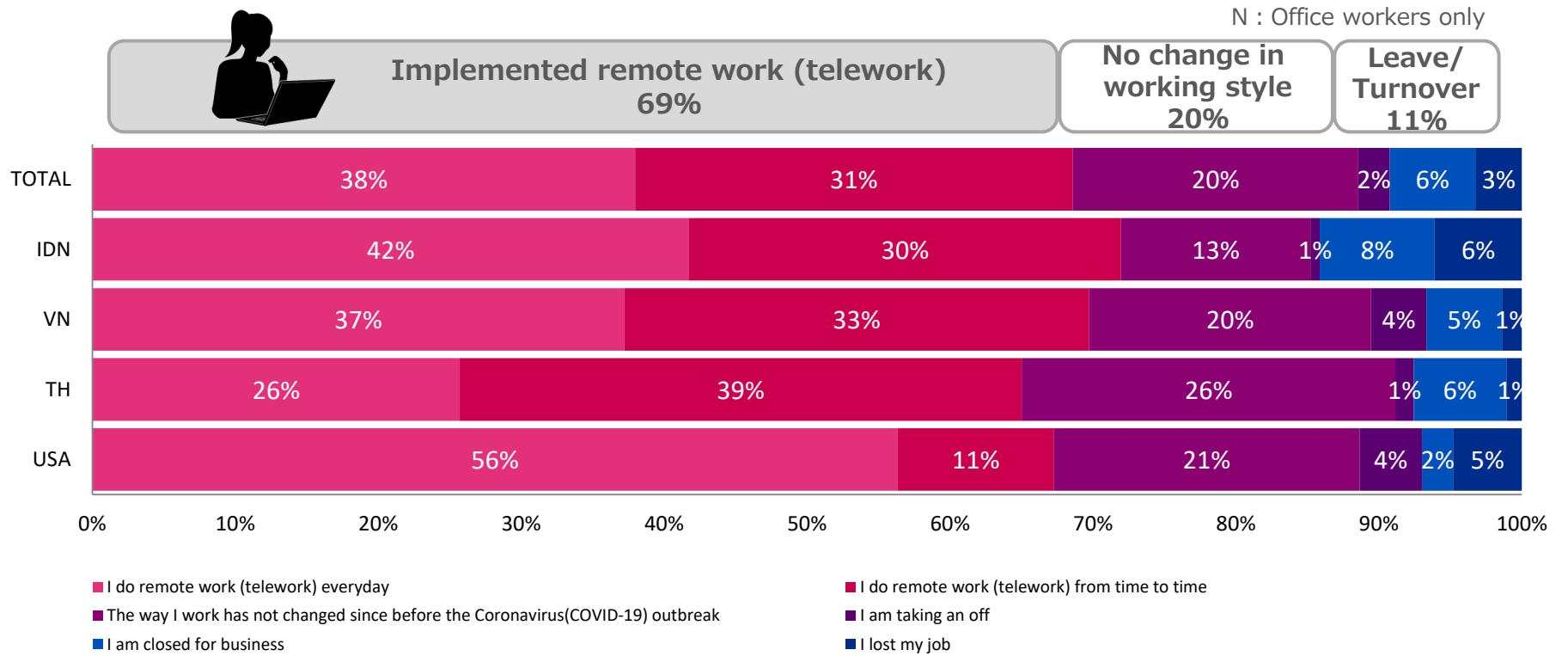
- Expansion of domestic IT and platform services (VN)
- While the hoax is complicated, attention is focused on the "tell the truth" CM of the detergent manufacturer (VN)
- "Urban Farming" to Heal Urban Life with "Green" (IDN)
- Remote work technology accelerates all at once (Efficiency & healing) (US)

[Actual situation]

● **Work styles in the new Corona (Q18) (SA)**

About 60% of all workers are performing telework (daily + sometimes) = Experienced
 Focused on only the office worker, it would be approx. 69%

—72% in Indonesia and 70% in Vietnam, more office workers than the US are performing telework



[Changes]

● **Changes in working styles after the new Corona (Q19) (MA)**

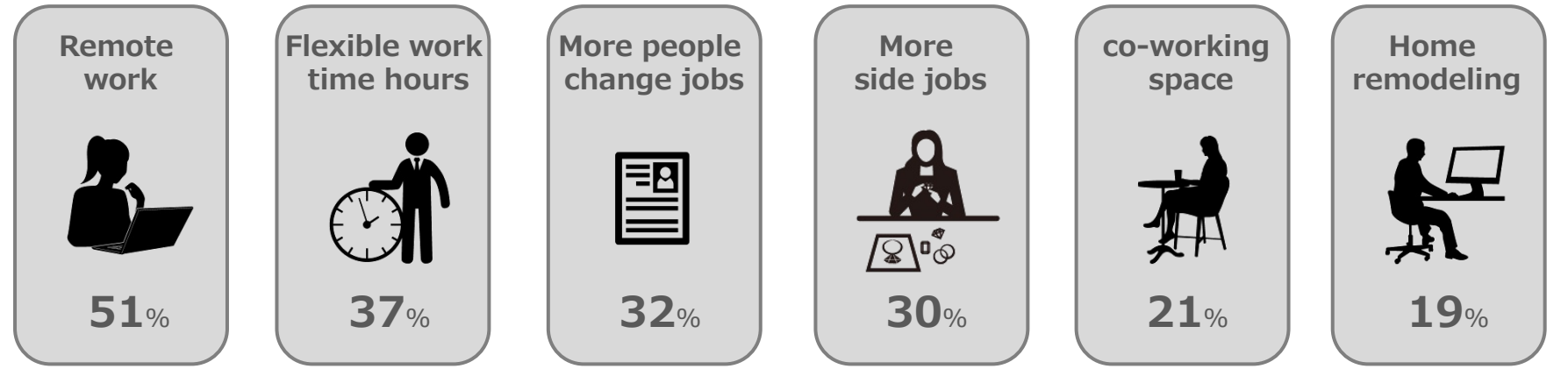
Remote work increases in Indonesia (55%) and Thailand (54%)

Employment tends to become more flexible in Indonesia and Thailand.

(Increased freelance, increased number of people changing jobs, and increased side jobs)

N : Office workers only

TTL



More remote work

More flexible work time hours

More people change jobs

The side business will flourish

More co-working space

Home remodeling such as study room

| | |
|-----|--------------|
| US | : 56% |
| TH | : 54% |
| VN | : 37% |
| IDN | : 55% |

| | |
|-----|--------------|
| US | : 33% |
| TH | : 34% |
| VN | : 51% |
| IDN | : 33% |

| | |
|-----|--------------|
| US | : 24% |
| TH | : 22% |
| VN | : 39% |
| IDN | : 40% |

| | |
|-----|--------------|
| US | : 15% |
| TH | : 37% |
| VN | : 16% |
| IDN | : 41% |

| | |
|-----|--------------|
| US | : 15% |
| TH | : 25% |
| VN | : 24% |
| IDN | : 17% |

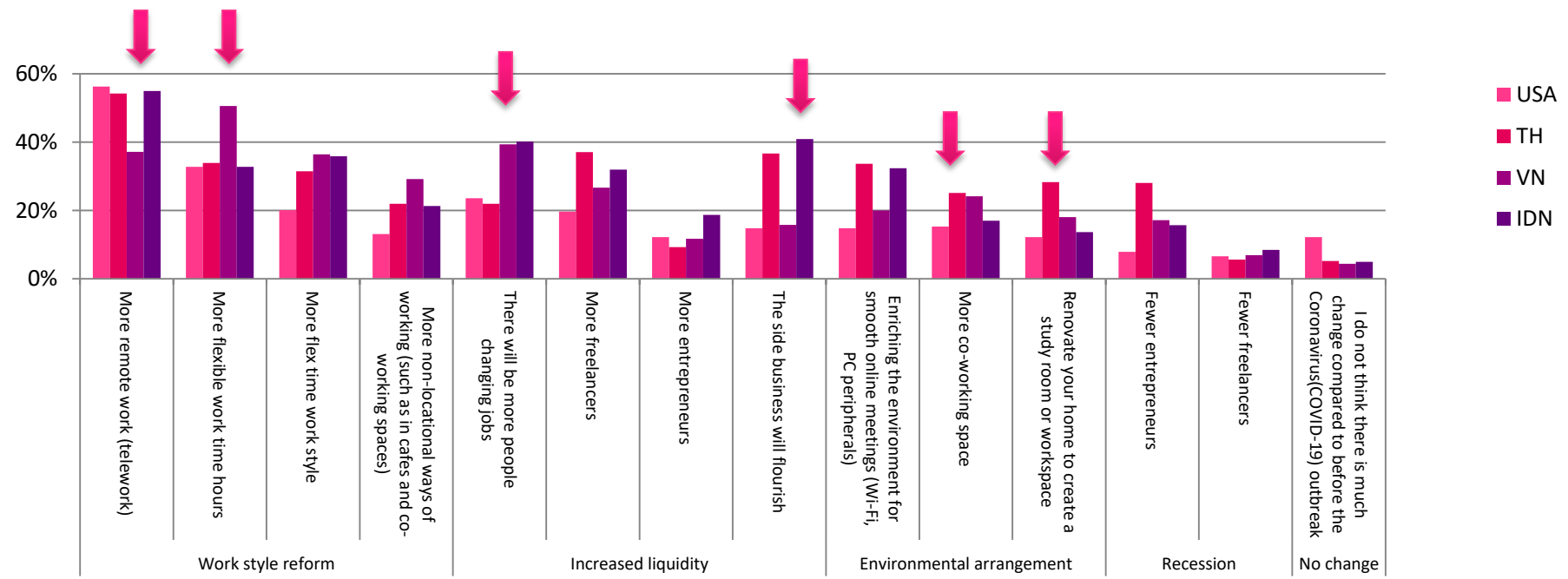
| | |
|-----|--------------|
| US | : 12% |
| TH | : 28% |
| VN | : 18% |
| IDN | : 14% |

[Changes]

● Changes in working styles after the new Corona (Q19) (MA)

- Vietnam's transition to telework is different (37%) compared to other countries
- Freelance increased in Thailand (37%) and Indonesia (32%)
- Increasing number of job transfers in Indonesian (40%) and Vietnam (39%)
- Indonesian side business flourishes (41%)
- Opportunity to remodel for study and work room, Thailand (28%)

N : Office workers only

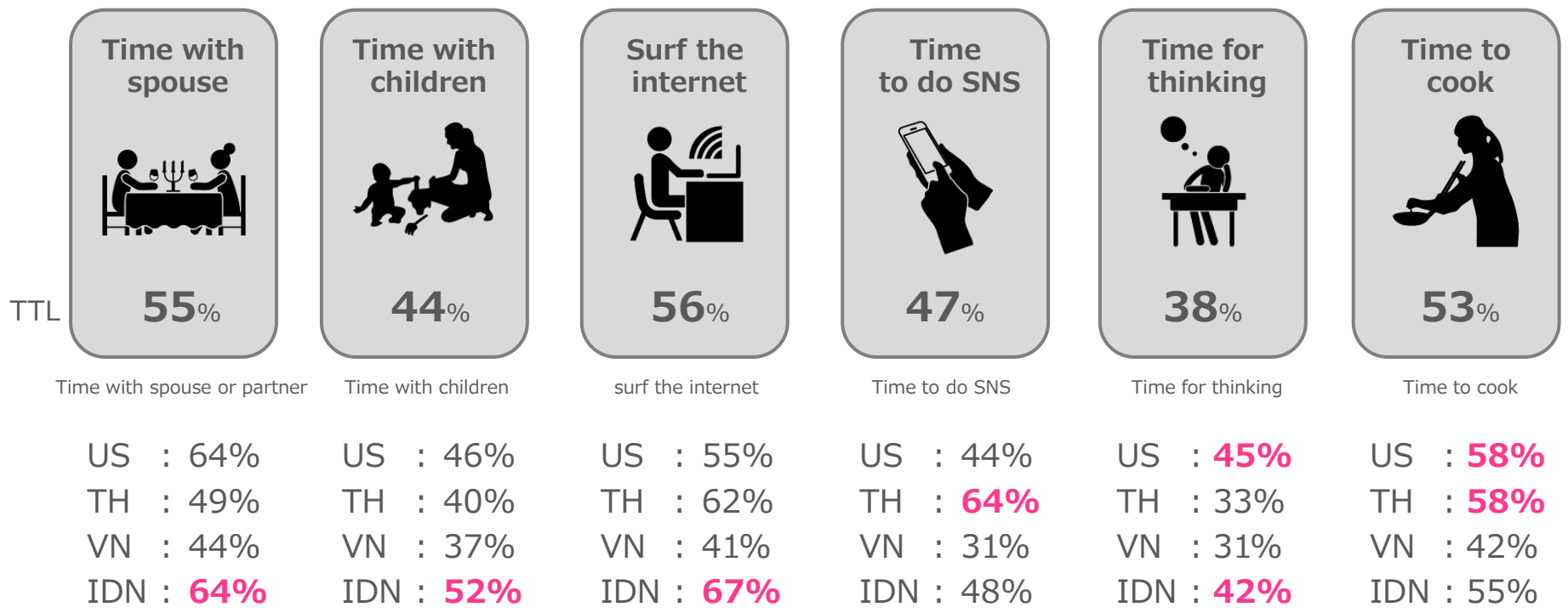


[Actual situation]

● **What is the increased time** under new Corona epidemic? (Q27) (MA)

Time with spouse and partner, time to study, time to cook, etc.

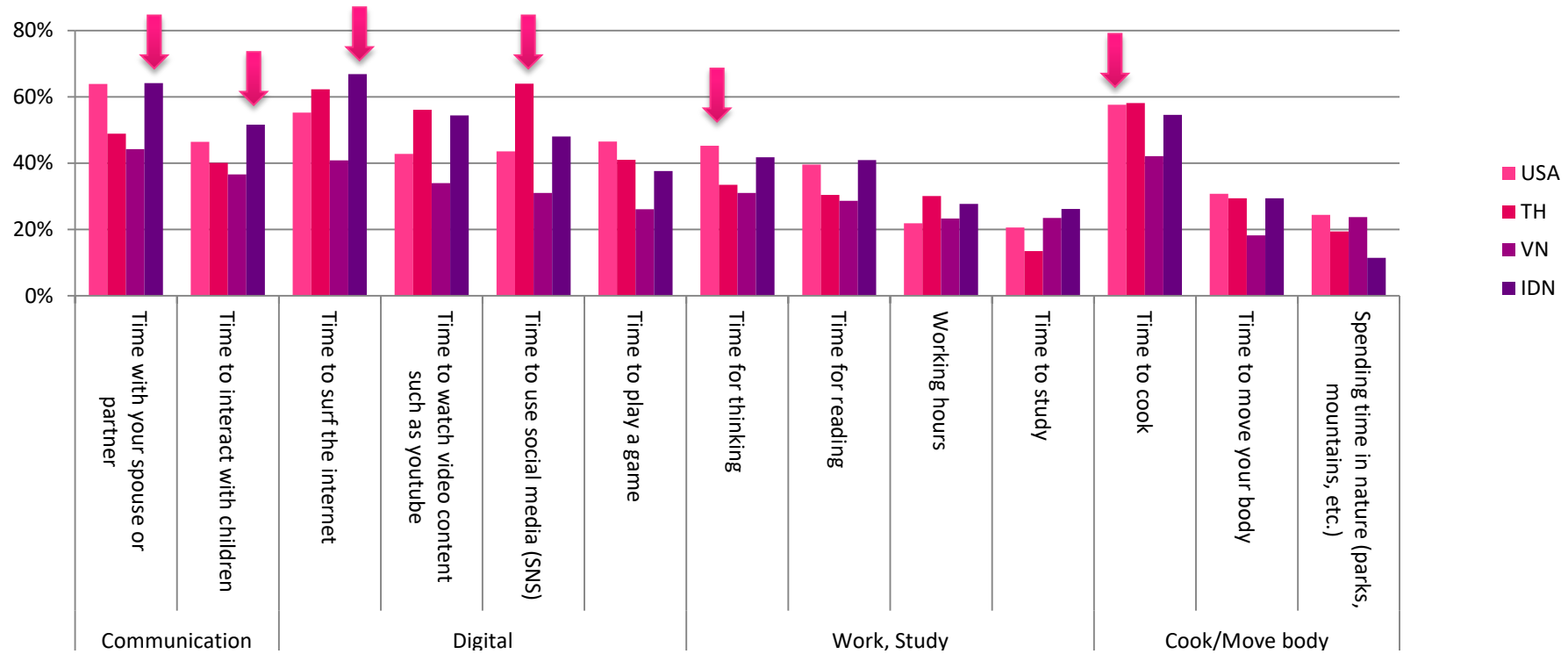
Time not being digital (net, SNS) is also increasing



[Actual situation]

● What is the increased time under new Corona epidemic? (Q27) (MA)

- US (64%) and Indonesia (64%) spend more time with spouse or partner
- Indonesia (26%), Vietnam (24%) more time to study
- More time to cook for US (58%), Thai (58%), Indonesia (55%)
- Increased time to interact with children in Indonesia (52%)

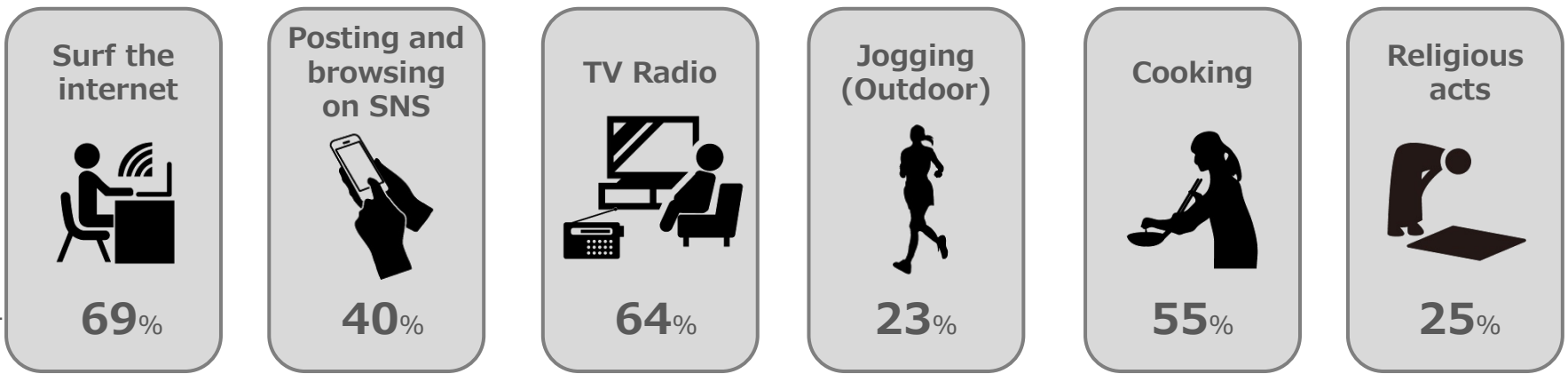


[Actual situation]

● What are **the actions that have increased** with the new corona epidemic? (Q10) (MA)

Digital entertainment systems such as games, internet, and SNS have increased remarkably in Thailand and Indonesia

TTL



Surf the internet Posting and browsing on SNS TV · Radio Take a walk or jog outdoors Cooking Religious acts (prayer)

| Country | Surf the internet | Posting and browsing on SNS | TV · Radio | Take a walk or jog outdoors | Cooking | Religious acts (prayer) |
|---------|-------------------|-----------------------------|------------|-----------------------------|---------|-------------------------|
| US | 71% | 13% | 80% | 38% | 63% | 18% |
| TH | 73% | 66% | 59% | 19% | 56% | 11% |
| VN | 53% | 32% | 54% | 13% | 45% | 5% |
| IDN | 81% | 48% | 65% | 20% | 58% | 65% |

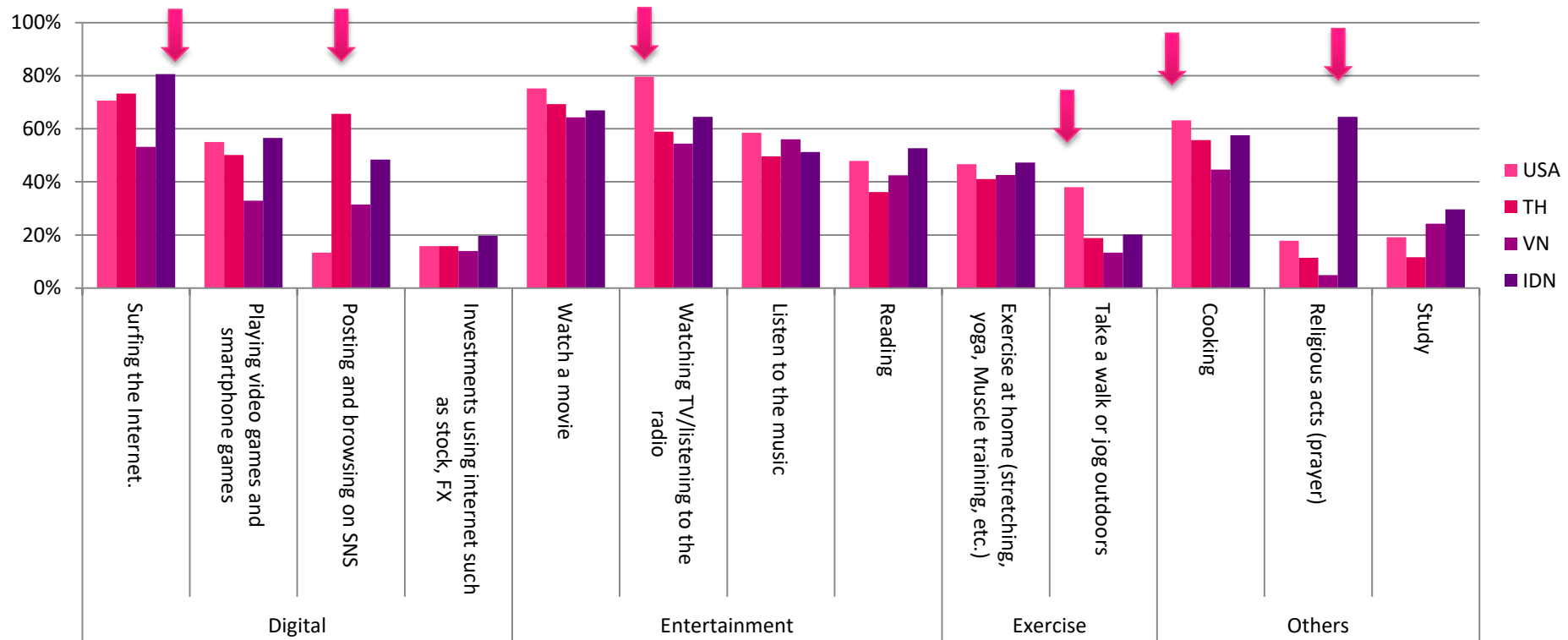
[Actual situation]

● What are the actions that have increased with the new corona epidemic? (Q10) (MA)

—In terms of TV/radio, watching movies, and listening to music,

60% of people in all four countries said that entertainment increased.

—65% increase in religious activities in Indonesia (Muslim country features such as praying five times at home)

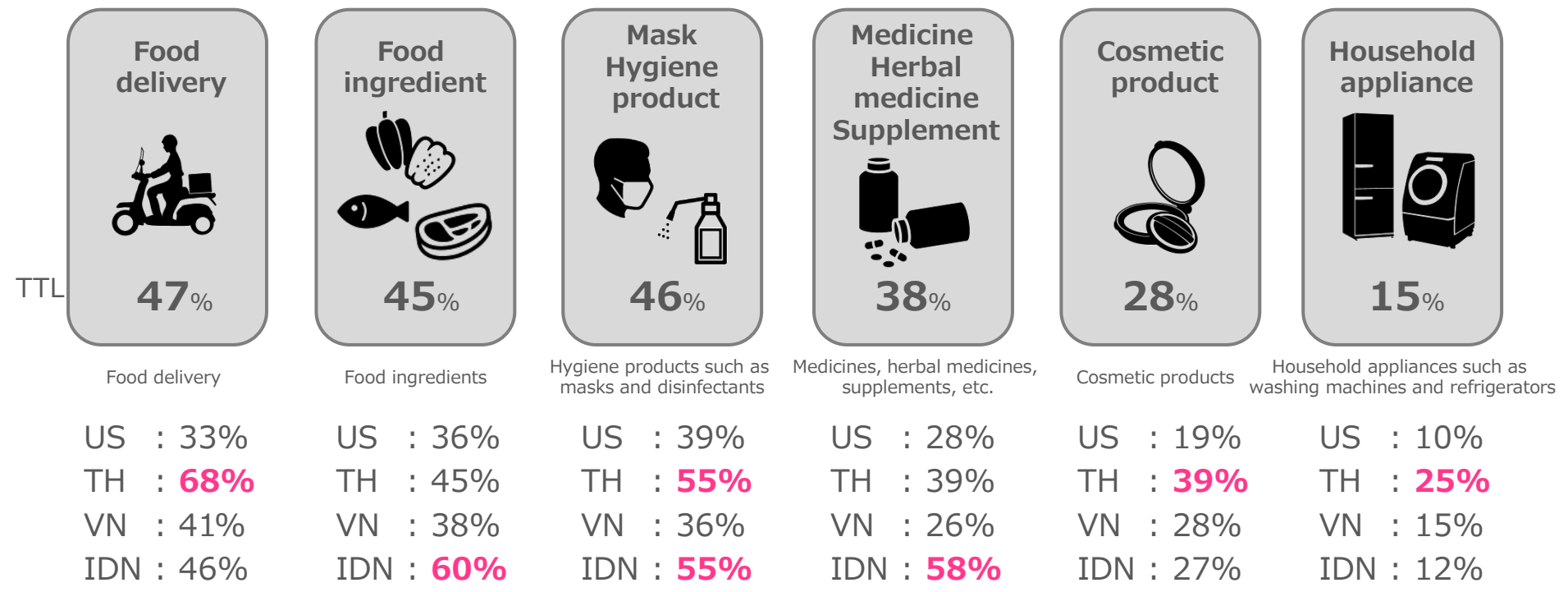


[Actual situation]

● What are the new EC purchases since April? (Q20) (MA)

Food ingredients (45%), Food delivery (47%), Hygiene products (46%)

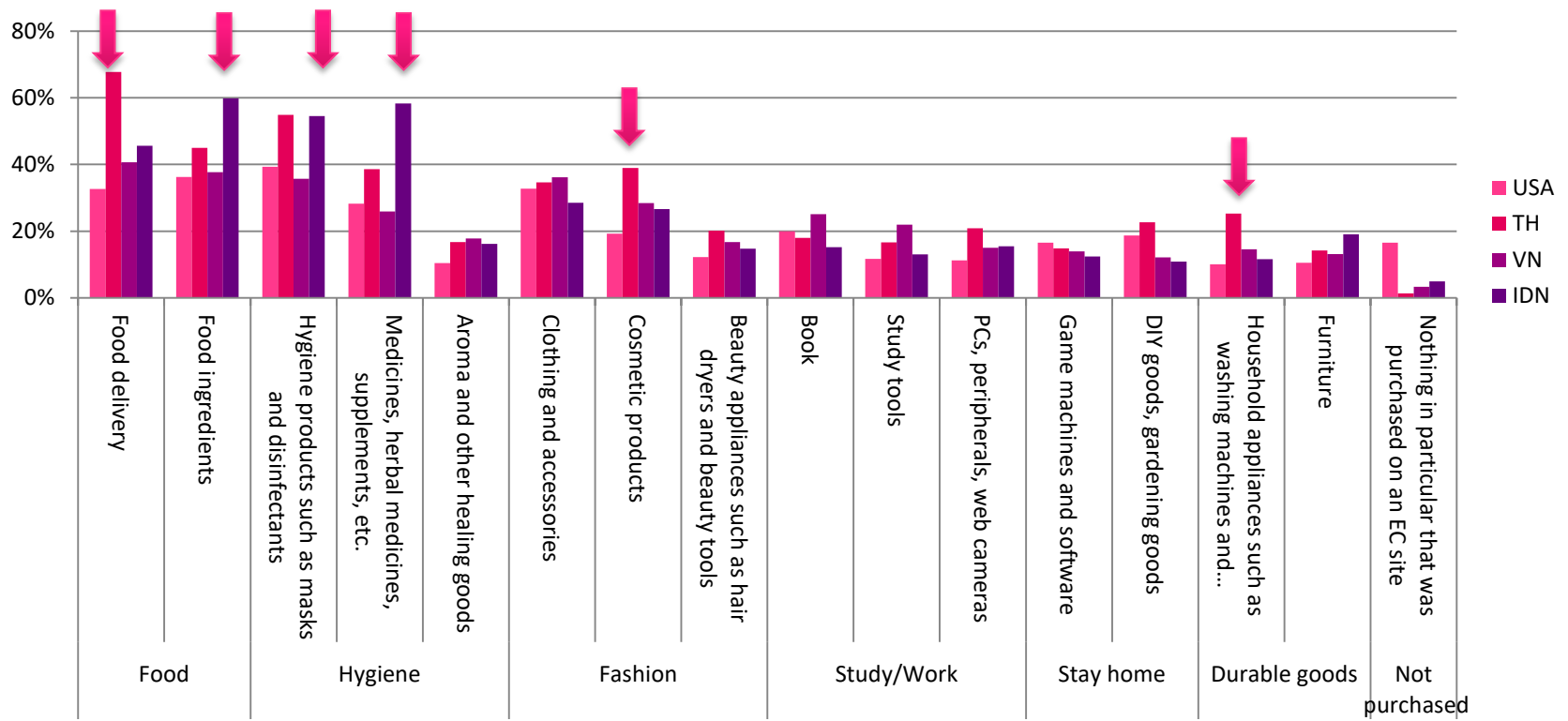
Products unique to the new Corona are ranked high.



[Actual situation]

● What are the new EC purchases since April? (Q20) (MA)

- In Indonesia, ingredients are 60% which is higher than other countries
- In Thailand (39%) and Indonesia (58%), medicines, herbal medicines, supplements are performing well, and traditional supplements such as jams may be included.
- In Thailand, clothes and accessories are purchased by 35%.



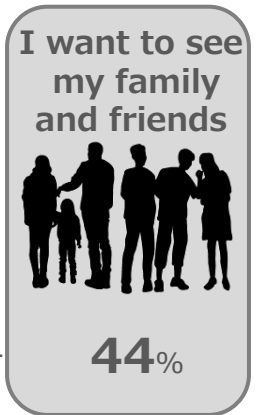
[Changes]

● Challenges/issue in terms of living (Q12) (MA)

44% of people in each country want to meet distant family members and friends because movement restrictions are issued.

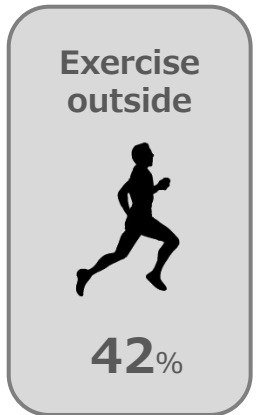
I want to get some exercise outside (42%), I cannot live my life in a balanced way (35%), More expense on the utility bill (39%) - issues unique to staying at home are high.

TTL



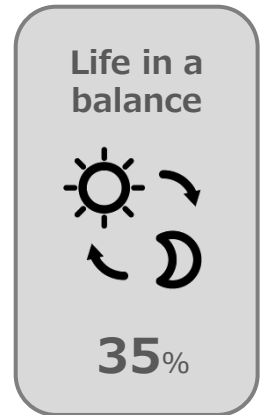
I want to see my family and friends away from home

| | |
|-----|--------------|
| US | : 51% |
| TH | : 36% |
| VN | : 30% |
| IDN | : 58% |



I want to get some exercise outside

| | |
|-----|--------------|
| US | : 37% |
| TH | : 36% |
| VN | : 44% |
| IDN | : 51% |



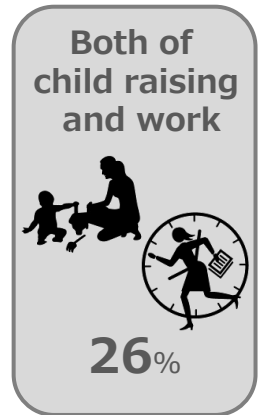
I cannot live my life in a balanced way

| | |
|-----|--------------|
| US | : 28% |
| TH | : 39% |
| VN | : 32% |
| IDN | : 41% |



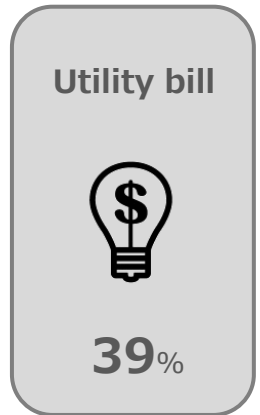
I have no choice but to commute

| | |
|-----|--------------|
| US | : 14% |
| TH | : 37% |
| VN | : 24% |
| IDN | : 25% |



It is difficult to Both of child raising and work

| | |
|-----|--------------|
| US | : 24% |
| TH | : 25% |
| VN | : 31% |
| IDN | : 25% |



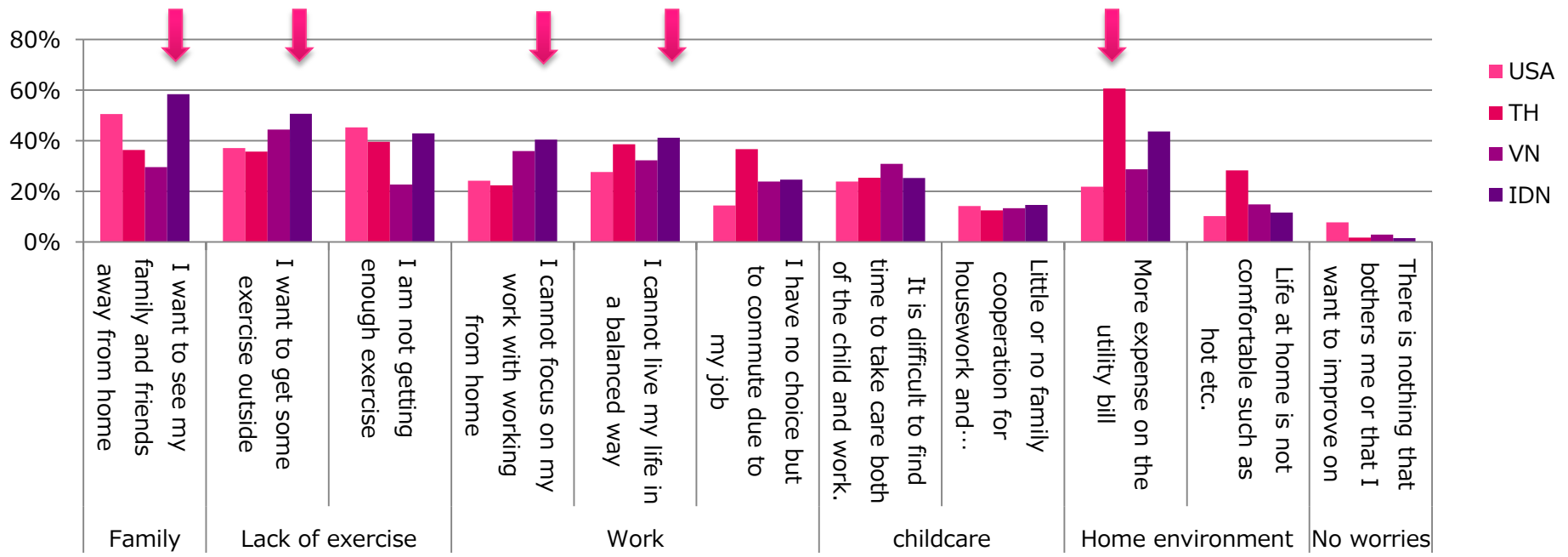
More expense on the utility bill

| | |
|-----|--------------|
| US | : 22% |
| TH | : 61% |
| VN | : 29% |
| IDN | : 44% |

[Changes]

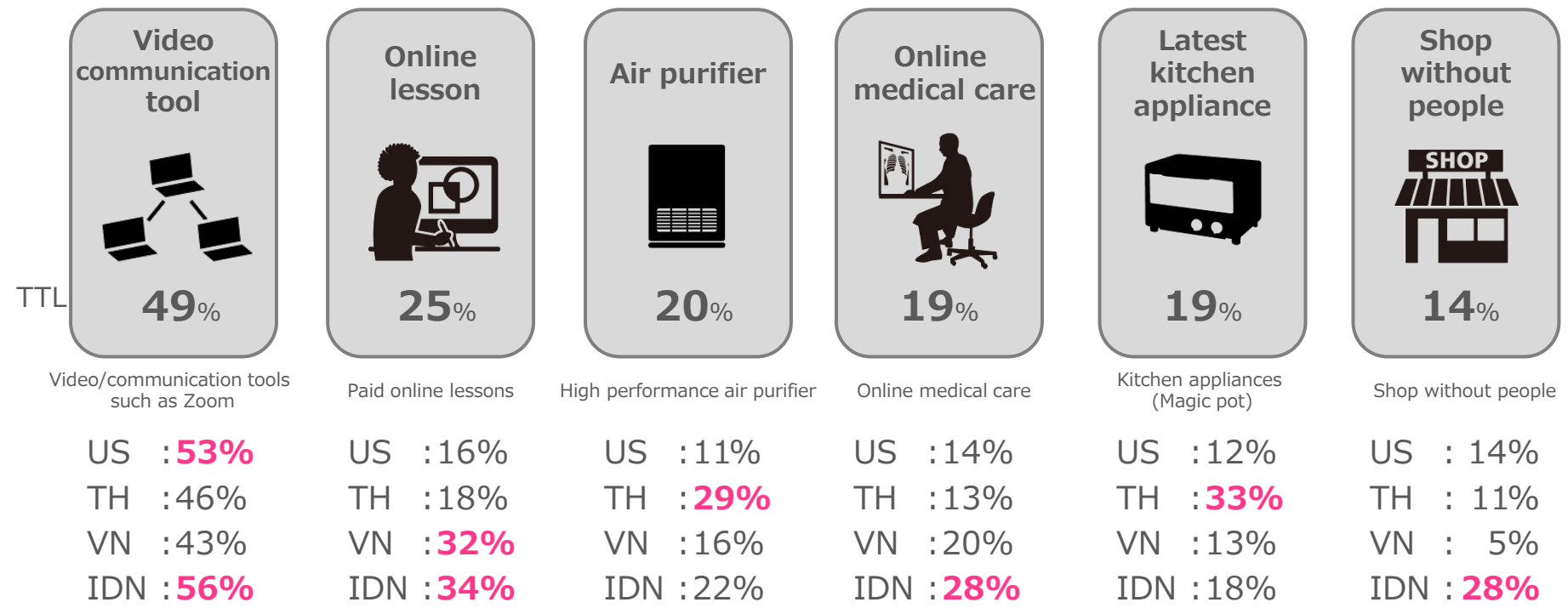
● Challenges/issue in terms of living (Q12) (MA)

—I cannot concentrate with working from home. Vietnam (36%), Indonesia (40%)



[Changes]

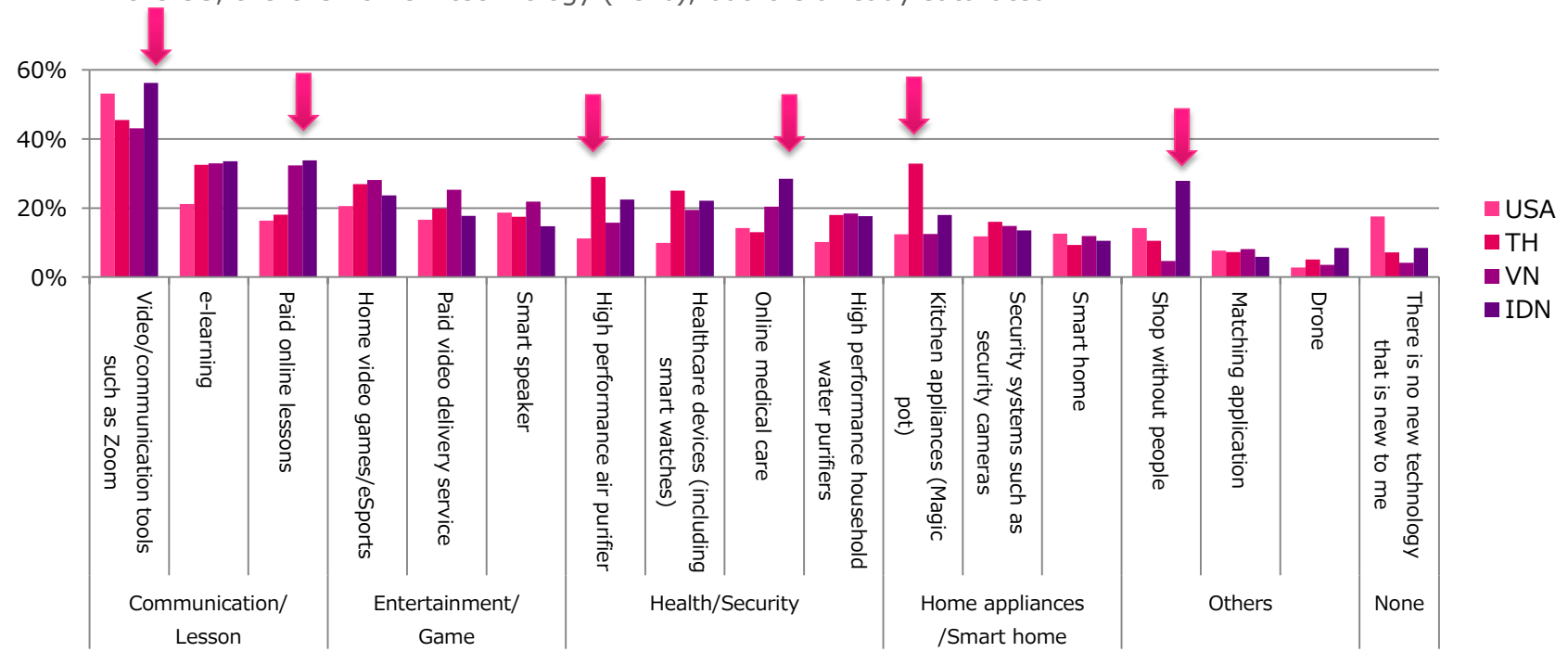
● What is **the new technology taken** in the new Corona? (Q28) (MA)
 Video communication tools such as ZOOM (49%), e-learning (30%)



[Changes]

● What is the new technology taken in the new Corona? (Q28) (MA)

- Paid online lessons in Indonesia (34%) and Vietnam (32%)
- In Indonesia, the intention to use the latest tech solution is “Online medical care” (28%) “Shop without people” (28%)
- In Thailand, new kitchen appliances such as magic pods (33%), smart watches (25%), and high-performance air purifiers (29%) are also popular.
- In the US, there is no new technology (18%), but it is already saturated.



7.

【Actual situation / Changes】

- Ensuring safety of sterilization for baby goods (TH/VN)
- Childcare worries are "learning delay" and "child stress relief"
- No makeup, light makeup, skin got whiter (IDN/VN)
- Posting of skin care (lotion, emulsion, beauty essence) is active (US/IDN)
- Physical change is remarkable, weight gain is 57% (TH)

【Remaining / New Movements】

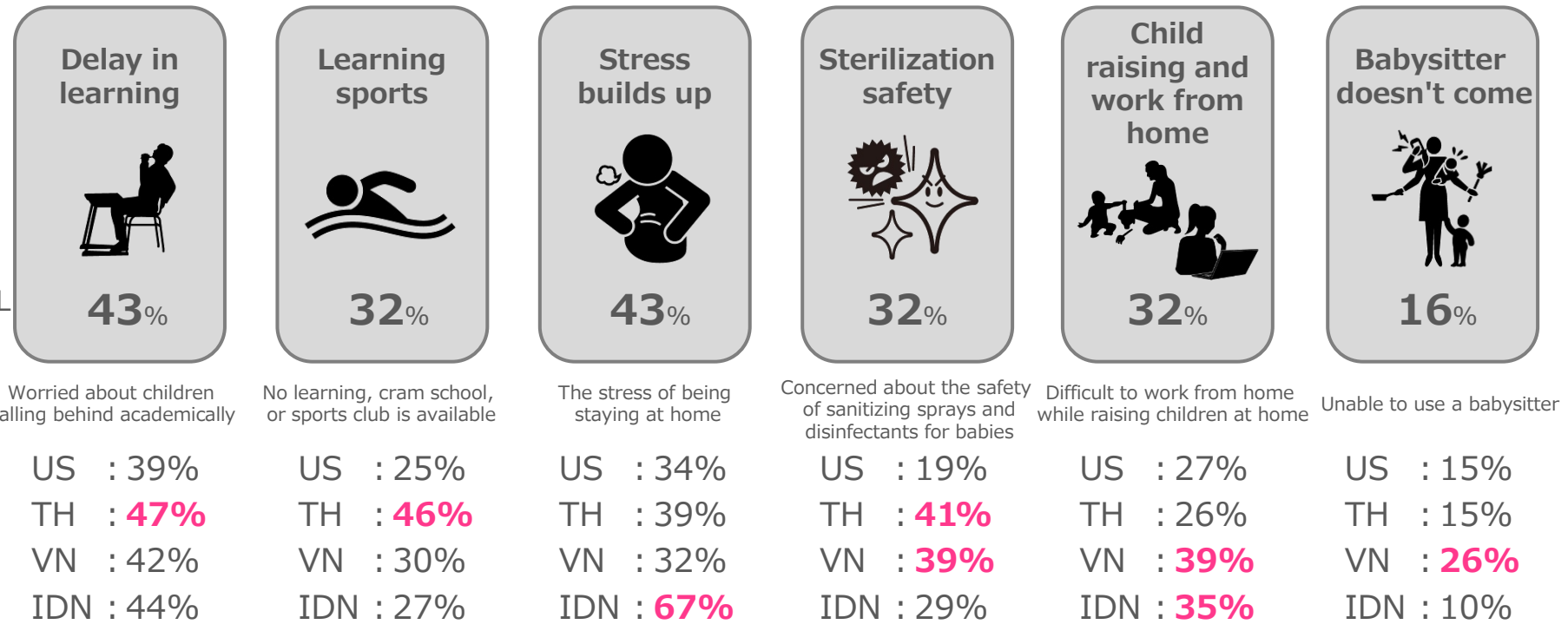
- Beauty sanitizer appears (IDN)
- The makeup of each country has decreased and the skin has become a detox period

[Actual situation]

● **Problems and worries about childcare** during the new Corona epidemic (Q15) (MA)

Concerns about children's learning delays are noticeable in each countries (43%)

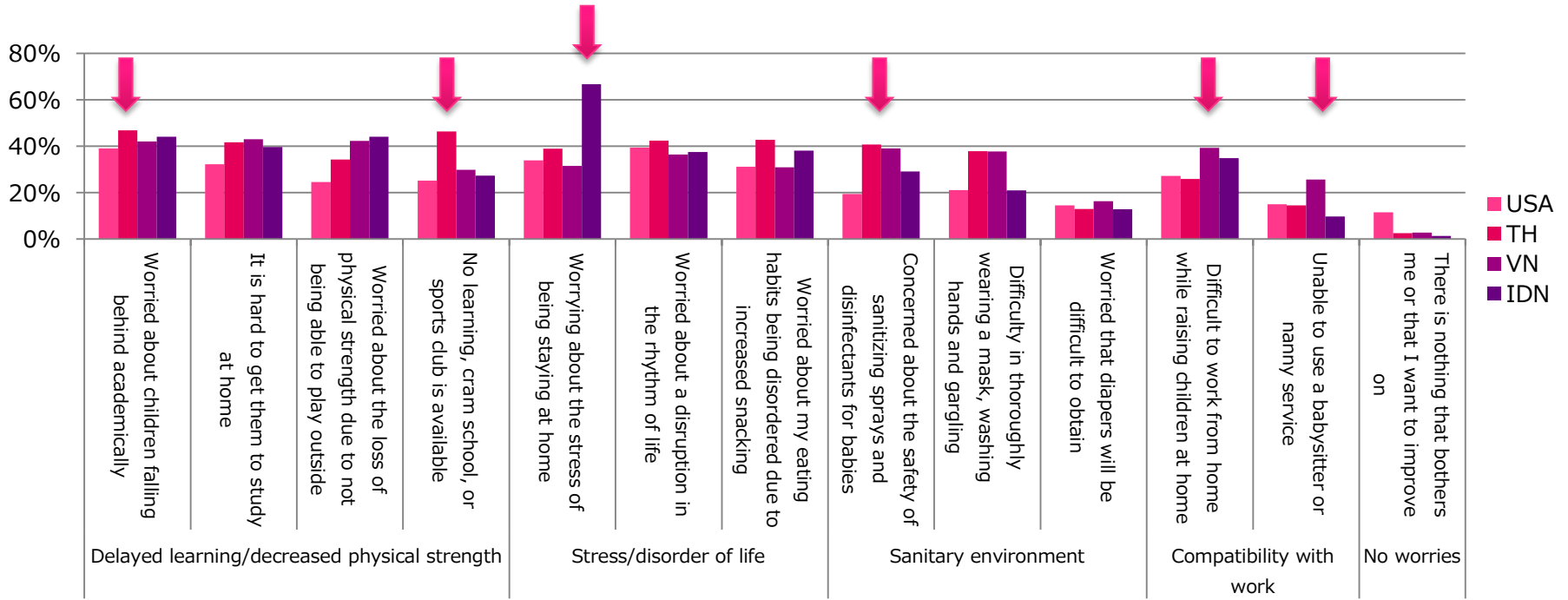
TTL



[Actual situation]

● **Problems and worries about childcare during the new Corona epidemic (Q15) (MA)**

- In Indonesia, 67% of parents worrying about the stress due to children staying home
- In Vietnam, worry about balancing childcare and working from home (39%)
- In Vietnam, unable to use a babysitter or nanny service (26%)
- In Thailand, children are worried about being unable to learn or go to sports clubs (46%)








[changes]

● Changes in makeup during the new corona epidemic (Q16) (SA)

- The increase in cosmetics is
- Basic Skin Care: Cleansing (+25%)
- Beauty essence/cream (+10%)
- Beauty supplement (+12%)
- Hair care (+15%)、Moisturizing care (+23%)

—Since going out is prohibited, basic cosmetics and supplements are increasing.
 —Moisturizing care products for hands are also growing in each country due to the influence of rubbing alcohol.

Increase

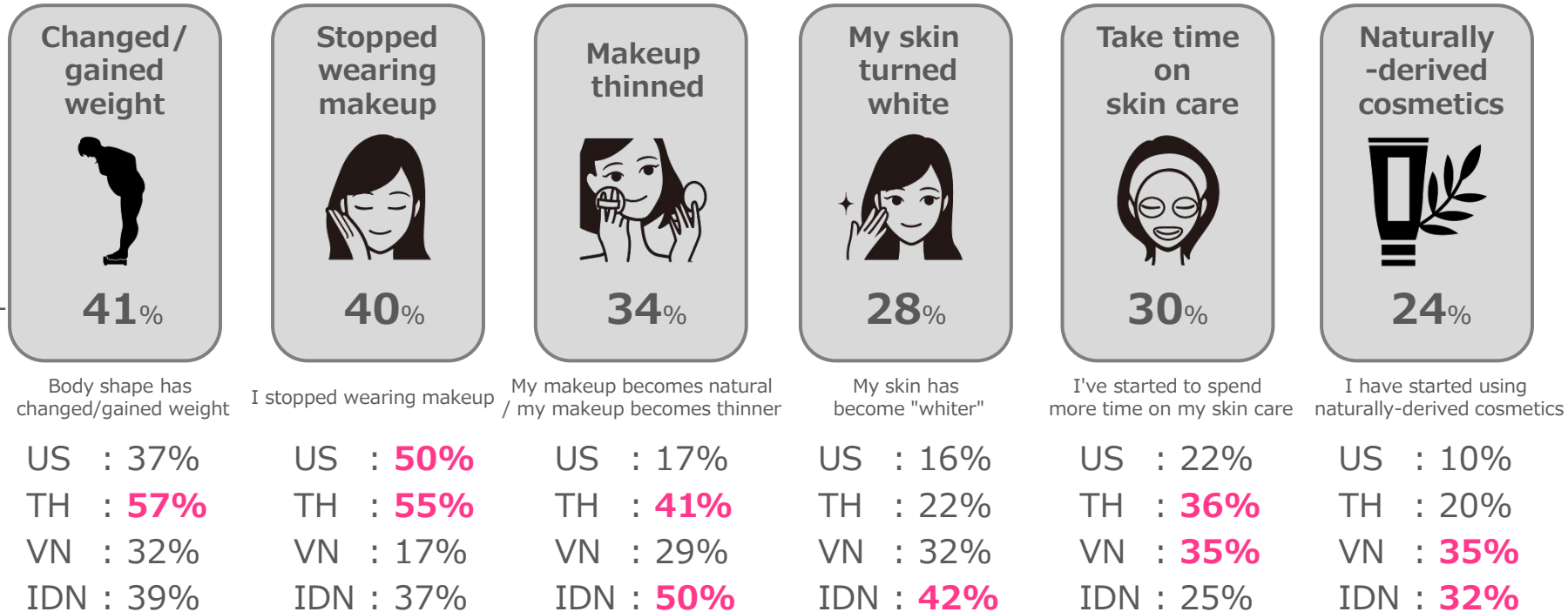
| | | |
|--|--|--|
|  <p>Cleansing , face wash</p> <p>US : 22%</p> <p>TH : 38%</p> <p>VN : 21%</p> <p>IDN : 17%</p> |  <p>Beauty essence, cream</p> <p>US : 12%</p> <p>TH : 24%</p> <p>VN : 6%</p> <p>IDN : -3%</p> |  <p>Beauty supplements</p> <p>US : 7%</p> <p>TH : 23%</p> <p>VN : 6%</p> <p>IDN : 14%</p> |
|  <p>Treatments</p> <p>US : -1%</p> <p>TH : 29%</p> <p>VN : 0%</p> <p>IDN : 28%</p> |  <p>Moisturizing care for hands and body</p> <p>US : 35%</p> <p>TH : 34%</p> <p>VN : 5%</p> <p>IDN : 16%</p> | |



[changes]

● **Changes in makeup and beauty** compared to before the new corona epidemic (Q17) (MA)

As no more going out, Vietnam (32%) , Indonesia (42%) felt that their skin had become whiter > Whitening needs

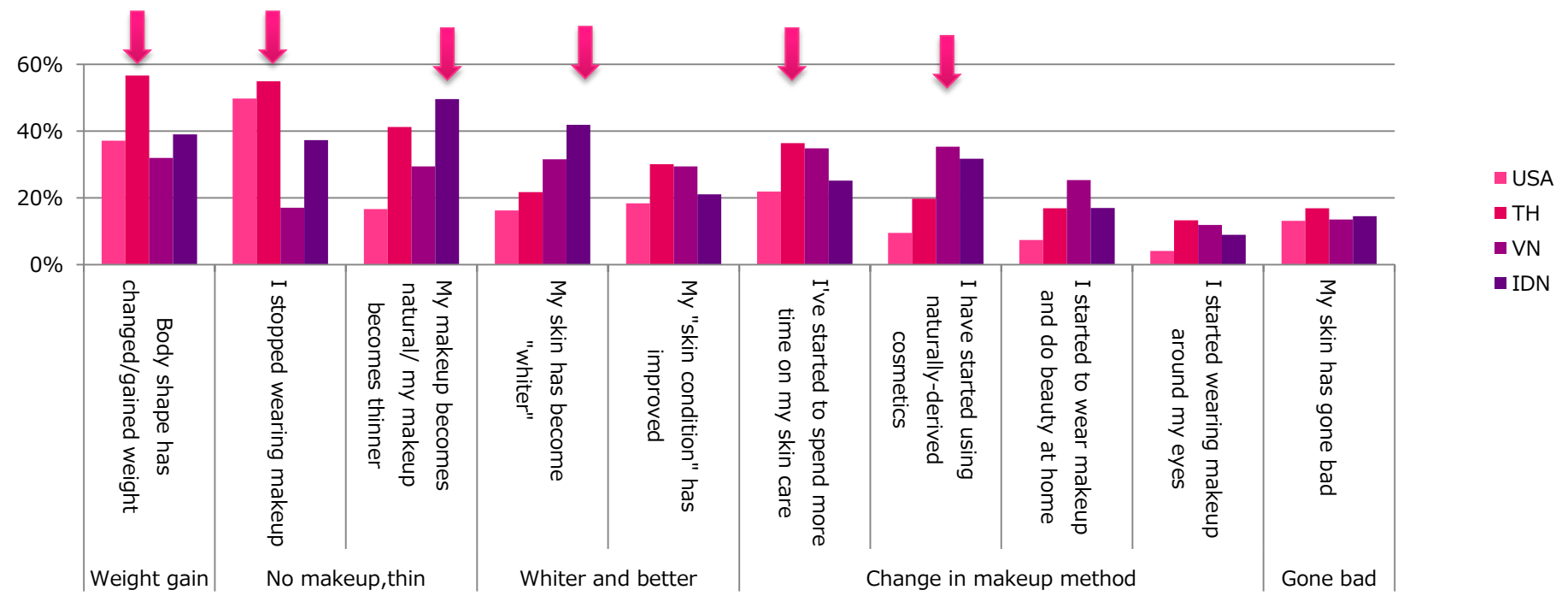


TTL

[changes]

● **Changes in makeup and beauty** compared to before the new corona epidemic (Q17) (MA)

- Vietnam (35%), Indonesia (32%) answered that they started to use cosmetics of natural origin
- In Indonesia, 50% answered natural makeup (Became thin makeup)
- In the US and Thailand, about half answered that they no longer wear makeup
- In Thailand, 57% had a change in body shape/weight, etc., which may increase the need for weight loss (diet)?



8.

Mobility

【Actual situation / Changes】

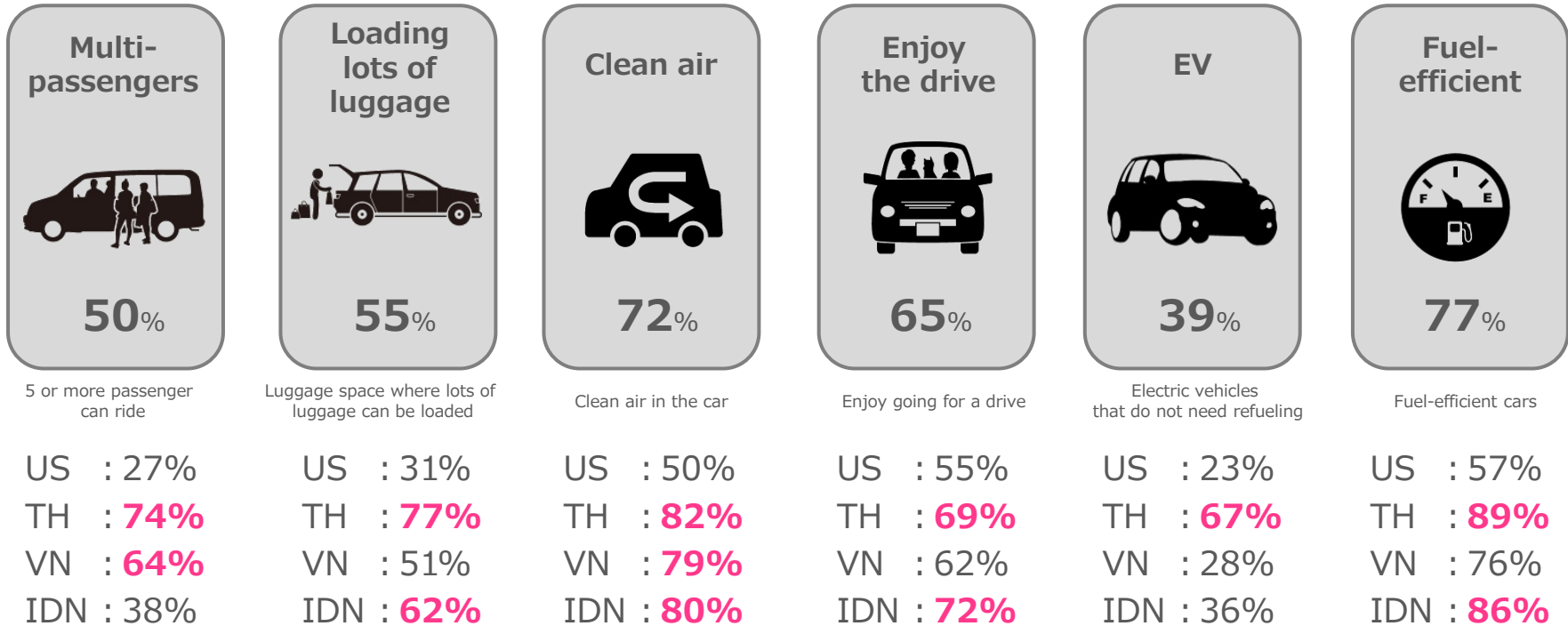
- Multi-Purpose Vehicles (MPV) are popular because they can carry a lot of people and cargo (TH)
- Ridesharing stagnates (2 wheels and 4 wheels)
- Currently, mobility is greatly limited in all countries
Air pollution levels in each city are very low

【Remaining / New Movements】

- Regression to self-ownership for car/motorcycle (avoid public transport)
- There is a high tendency to seek clean air and good fuel efficiency
- There's also a tendency to seek out the drive fun itself as a reaction to not riding the car (TH/IDN)
- Unmanned delivery service using Drones (US)

[Changes]

● **Changes in emphasis on car purchases** after the new Corona (Q25) (SA)
 The most important attribute that have risen significantly are "fuel-efficient cars" (77%), "clean air" (72%), and "antibacterial materials" (63%).

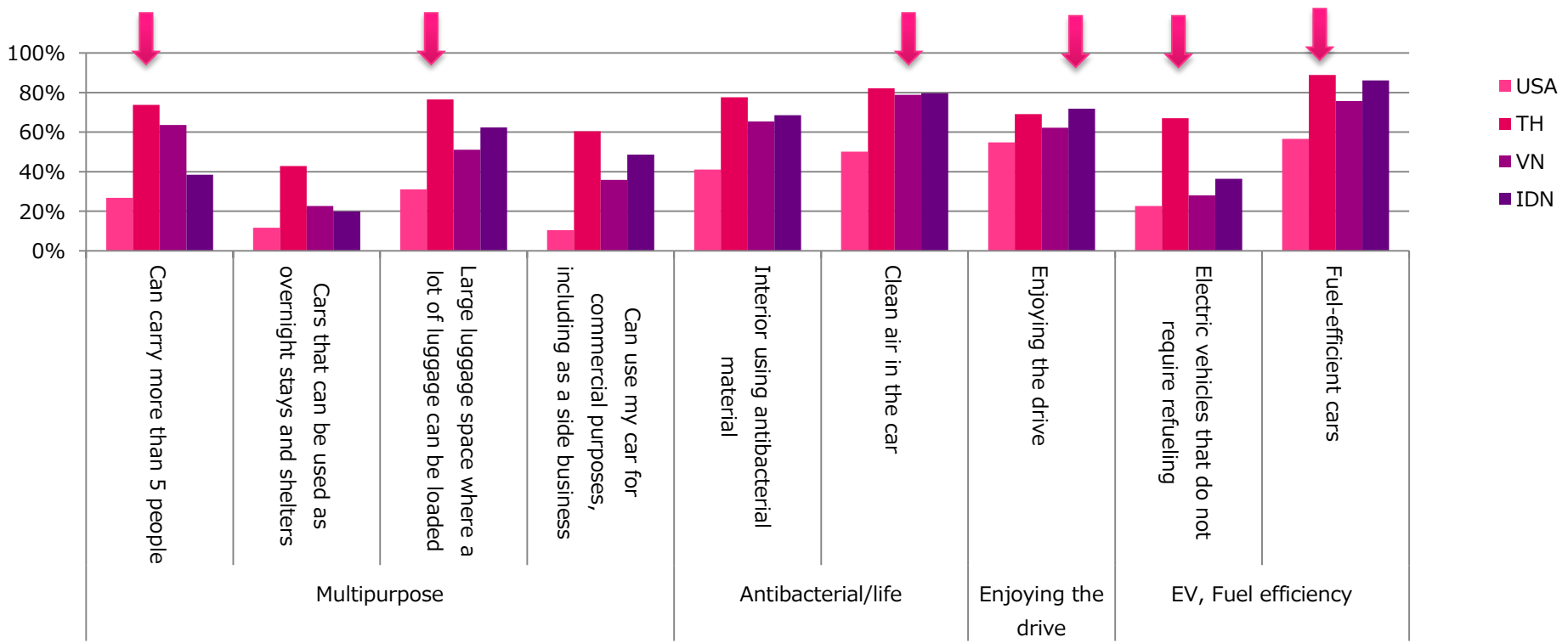


8 "Changes" for mobility <Quantitative Survey>

[Changes]

● Changes in importance on car purchases after the new Corona (Q25) (SA)

- in Thailand, popular in MPV (multi-purpose vehicle) such as "5 or more passengers" (74%), staying in the car or using shelter (43%)
- Indonesia (72%) and Thailand (69%) seem to have returned to the essence of "enjoy the drive."
- In Thailand, expectations for electric vehicles (EV) are more than twice as high as in other countries, at 67%.



⑧ "Changes" for mobility <Quantitative Survey>

[Changes]

● Changes in Mobility after corona (Q26) (SA)

Increasing the means of transportation after the pandemic are

- “Moving by your own car” (+37%)、
- “Moving by your own motorcycle” (+21%)

Decreasing the means of transportation after the pandemic are

- “Public transport” (-47%)
- “4-wheeler ridesharing” (-27%)、
- “2-wheeler ridesharing” (-31%)、
- “Airplanes” (-41%)

—In Indonesia, “Moving by your own car” 40% increase, “Moving by your own motorcycle” 38% increase, developed country in ridesharing changed to possession. “2-wheeler ride sharing” -31%, “4-wheeler ride sharing”-27%, public transport -47%, minibus -51%, so that changed in the way of travel occurs. Compared to other countries, there are changes in ownership of cars and motorcycles. —In US, isn't the "walking" 39% increase coupled with health-consciousness?

Increase

Your own car



| | |
|-----|--------------|
| US | : 24% |
| TH | : 58% |
| VN | : 28% |
| IDN | : 40% |

Your own motorcycle

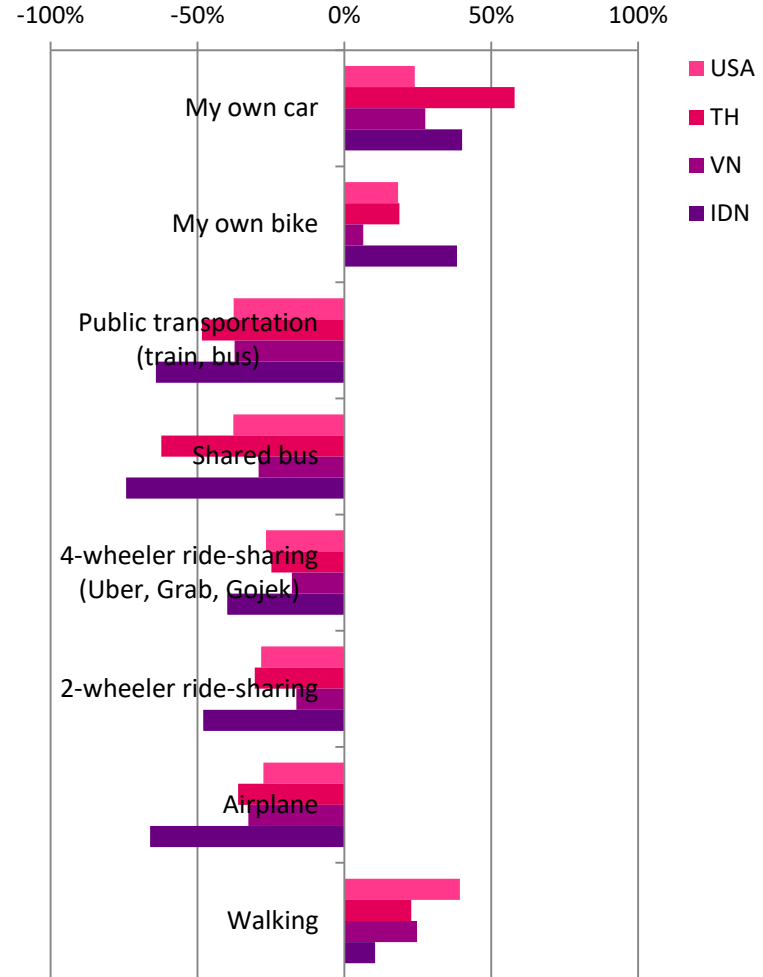


| | |
|-----|--------------|
| US | : 18% |
| TH | : 19% |
| VN | : 6% |
| IDN | : 38% |

Walking



| | |
|-----|--------------|
| US | : 39% |
| TH | : 23% |
| VN | : 25% |
| IDN | : 10% |



9.

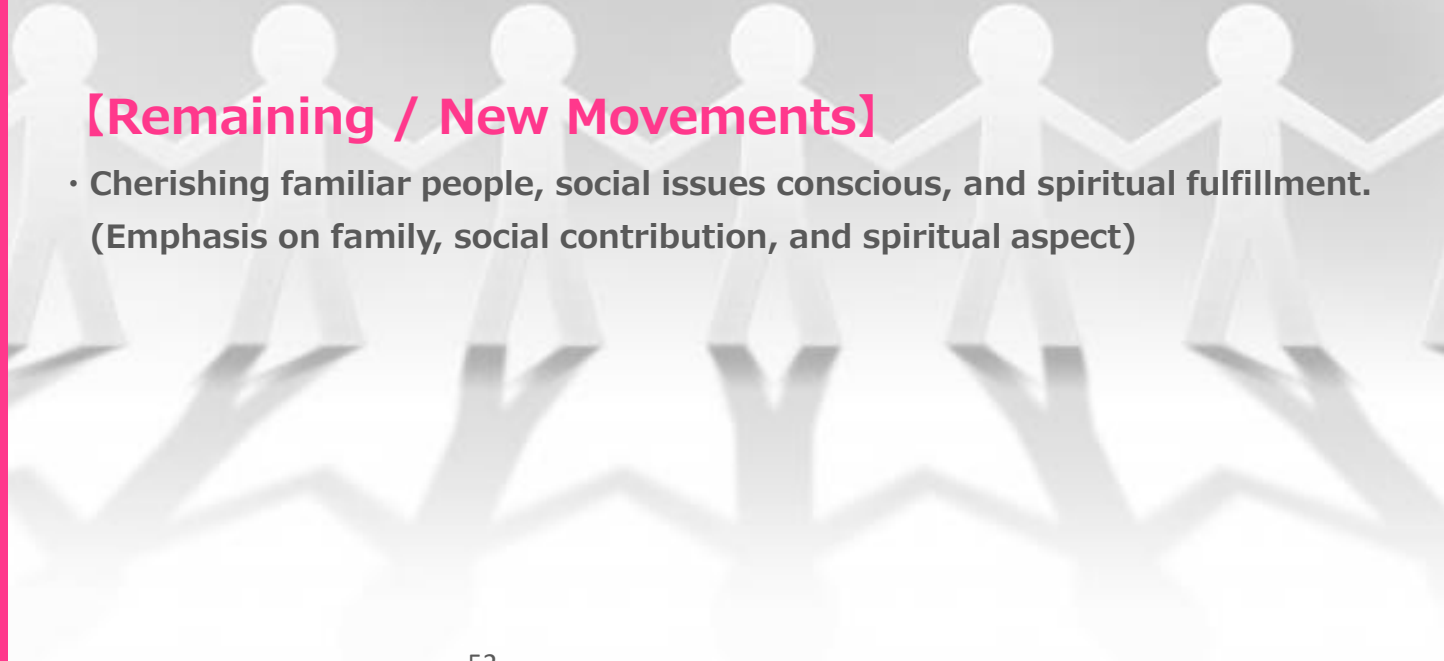
Values

【Actual situation / Changes】

- Social awareness and contribution to society are increasing in 3 ASEAN countries compared to US.
- Decreased needs to work in other countries in the future. (compared to 2018) (TH/IDN)

【Remaining / New Movements】

- Cherishing familiar people, social issues conscious, and spiritual fulfillment. (Emphasis on family, social contribution, and spiritual aspect)

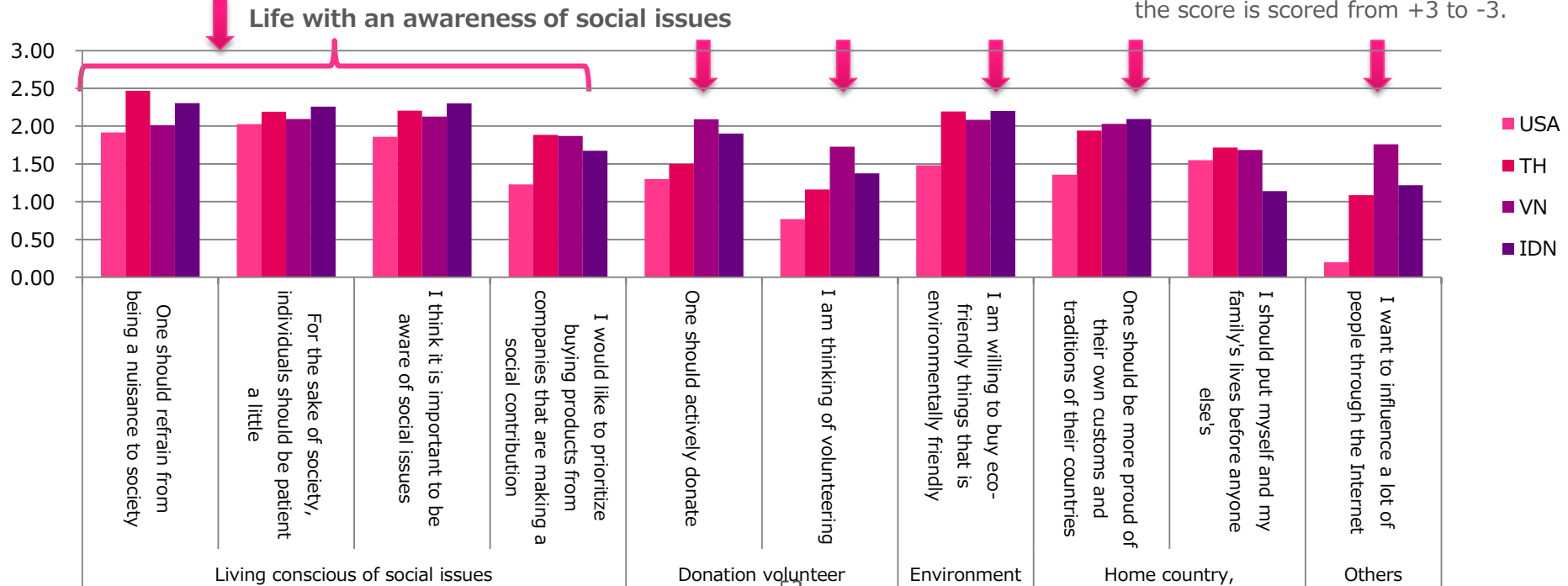


● Values at the time of the Corona epidemic (currently) (Q21) (SA)

- Social awareness and contribution to society are increasing in 3 ASEAN countries compared to US.
- "Refrain from inconvenience to society", "Slightly endure for society", "Important to be aware of social issues"
- Similarly, the 3 ASEAN countries have higher eco-awareness than the United States

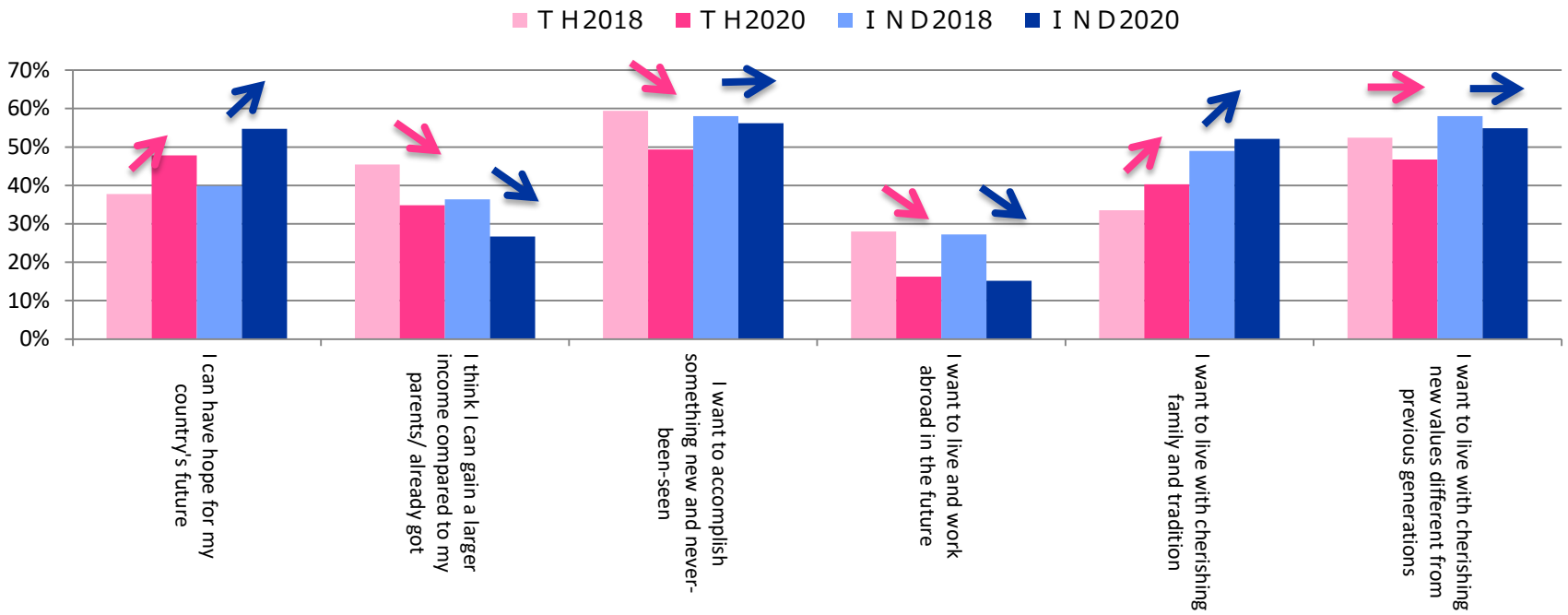
—In Indonesia and Vietnam, respondents have high levels of "pride in their customs and traditions"
 —In Vietnam, high level of "active donation"
 —In Vietnam, "I want to influence many people through the internet" is high.

※The median of the 7point scale is 0 and the score is scored from +3 to -3.



● Comparison of values in the 2018 survey (Millennial Intage Survey) and the 2020 new corona epidemic (Q 2 2) (3LA)

- There was an increase in the tendency to value people close to them and their own country, saying that they "have high expectations for the future of their country" and "live with family and traditions in mind".
 - The downward trend is "I can earn a larger income than my parents" and "I want to spend time in a different country". Economic insecurity & widening economic inequality and anxiety about going abroad are showing up.
- There is no change in Indonesia for "I want to achieve new things", "I want to live with new values" in Indonesia and Thailand.



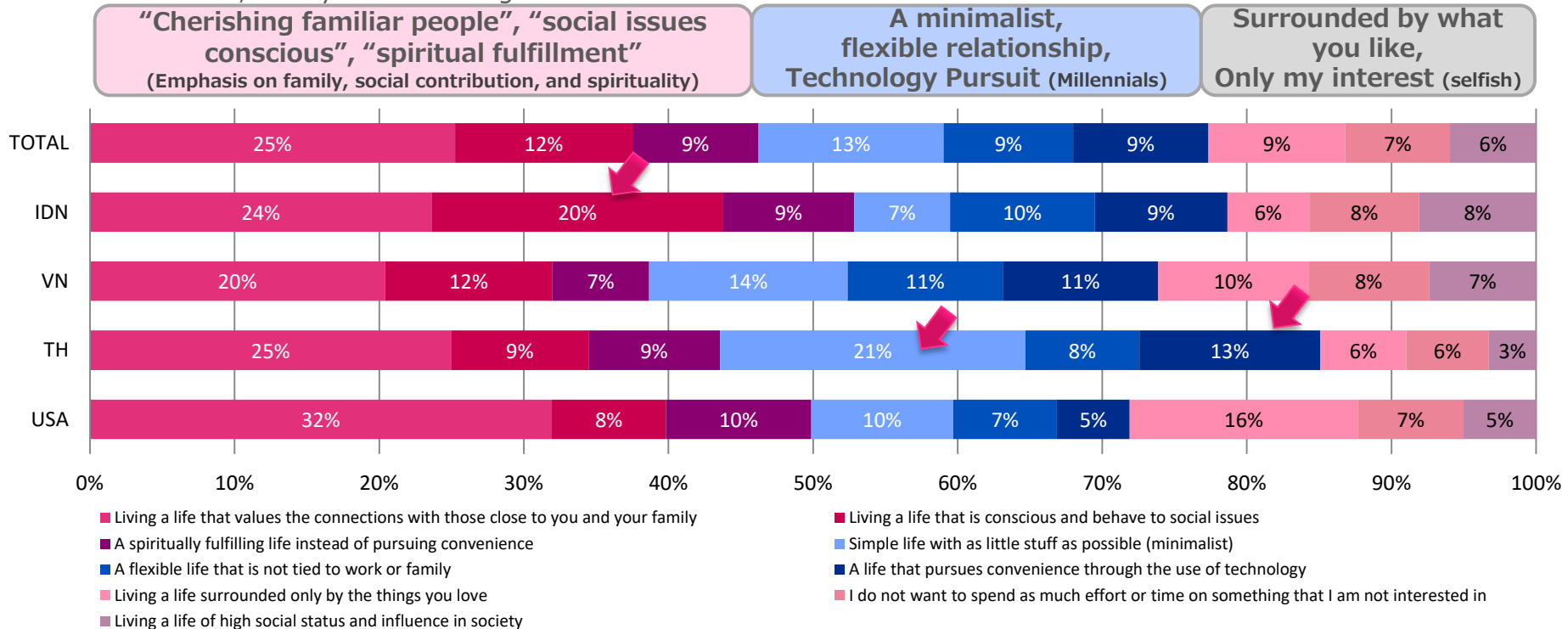
[Changes]

● **What is the lifestyle you most admire? (Q23) (SA)**

Top in each country with "Life with close relationships and life that values family" (25%)

Family ties are being reassessed in crisis

- The popularity of "minimalists" is increasing in Thailand (21%) and Vietnam (14%)
- Those who wants "convenient life using technology" in Thailand (13%) and Vietnam (11%)
- In Indonesia, 20% yearn for "living to be conscious of social issues".



- **Reaffirming the value of being healthy.**



- **Have a heart that values people around you.**



- **Enrichment of spirituality, everyone has come to demand this.**



- **Such corporate stance, services and products that are close to the life-size consumers will attract empathy and support.**



Create Consumer-centric Values

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