intage group
Know today, Power tomorrow

SITUATION ▼ PURCHASE BEHAVIOUR ▼ PLAN ▼

Covid-19 in Singapore

From February - mid of March 2020

OVERVIEW

#Online Survey #Singapore #Sample Size=240 **#Survey Period: Mar.19 – Mar.20**

Before 19th March		**Now (Circuit Breaker Mode)**
Areas with increasing cases: China, South Korea, Italy, Iran		Areas with increasing cases: Southeast Asia, USA, Europe, UK
SG implemented border control measures. Short-term visitor arrivals still permitted		SG banned all short-term visitor. Only foreign workers in essential services can enter
Moderate social distancing controls Major events >250 people are banned Advisories to reduce large crowds		Enhanced social distancing All events, gatherings, retail, entertainment venues are closed. Only takeaways/food delivery allowed All private gatherings are banned regardless size Social distancing (1m) is mandatory
Advised to operate business as usual		All workplaces and school except essential services must close

SUMMARY

More than 70% was continuously concerned about the Covid-19 situation.

Over 60% was using **digital media** to find out about Covid-19.

[Stay at home] increased significantly in March.

Near to 50% of Male has **lesser income** due to Covid-19.

20s is the largest age group to purchase [Health products] & [Food & Beverage].

[Hand sanitiser] & [Face masks] are the most popular items during the Covid-19 outbreak

31.7% reduced shopping in **Department store**.

29.6% increased shopping in **Supermarkets**.

65.4% of total’s shopping willingness will not change(as usual) after the epidemic

57.5% would like to **travel abroad** after the epidemic.

Regardless of gender and age, **Japan** is the most popular country to visit.

AGENDA

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DEMOGRAPHIC

PART

01

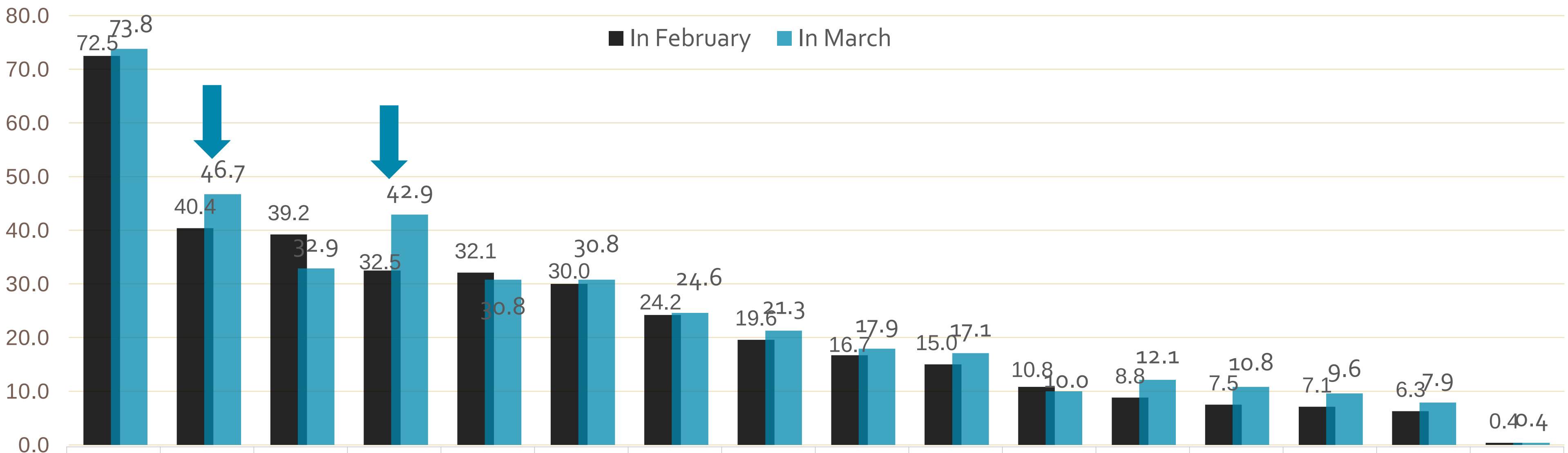
FEB VS MAR

Situation Overal / Transportation / Income

SITUATION

Overall, more than 70% are continuously concerned about the Covid-19 situation. The percentage of people who [Stay at home] and [Worried about the presence of confirmed cases in the surroundings] increased significantly in March. Besides, the rate of going out for shopping is basically the same, no significant changes between February and March.

➢ ***Which of the following descriptions is in line with the actual situation of your life / work at that time (MA)***



	N=	Pay attention to the Covid-19 situation	Stay at home/Work/study at home	Go to work in the company/ Go to school	Worried about the presence of confirmed cases in my surroundings	Occasionally go out to buy food (nearby supermarket, vegetable market, etc.)	Fresh food supply is sufficient to meet the demand	Stores provide safety and health precautions to reduce the risk of infection	Panic buying COVID-19 prevention products	Every day go out to buy food (nearby supermarket, vegetable market, etc.)	Increase the frequency of online shopping	It's hard to buy fresh food which led a rush on the stores.	Food and daily necessities are basically purchased online	No free access to the community	Although there is takeout, I dare not order due to hygiene concerns	Fewer delivery staff. Poor time efficiency	Others
In February	240	72.5	40.4	39.2	32.5	32.1	30.0	24.2	19.6	16.7	15.0	10.8	8.8	7.5	7.1	6.3	0.4
In March	240	73.8	46.7	32.9	42.9	30.8	30.8	24.6	21.3	17.9	17.1	10.0	12.1	10.8	9.6	7.9	0.4

Singapore Consumer Stockpiling

FEB DORSCON Orange

Stockpiling masks, toilet paper, groceries, rice and instant noodles

Will Dorscon raise to Red? / Will we be all quarantined at home? / What if China stops exporting food and toilet paper? / Need to protect against virus!

MAR Malaysia Lock-Down

Stockpiling mainly on chicken, eggs and fresh vegetables

Will Malaysia stop exporting chicken, eggs and fresh vegetables? / No need to worry about sanitizer and toilet paper stocks. / Some masks are available but low quality.

https://www.straitstimes.com/singapore/ntuc-fairprice-places-purchase-limits-on-essential-items-to-prevent-stockpiling
https://www.straitstimes.com/singapore/health/coronavirus-fairprice-chief-urges-calm-amid-panic-buying-of-groceries-singapores
Photos from https://www.channelnewsasia.com/news/commentary/panic-buying-wuhan-coronavirus-toilet-paper-instant-noodles-qu-12418048
https://www.straitstimes.com/singapore/ntuc-fairprice-places-purchase-limits-on-essential-items-to-prevent-stockpiling

「Kia Su, Kia Si, Kia SARS」

02
Kia Si

01
Kia Su

03
Kia SARS

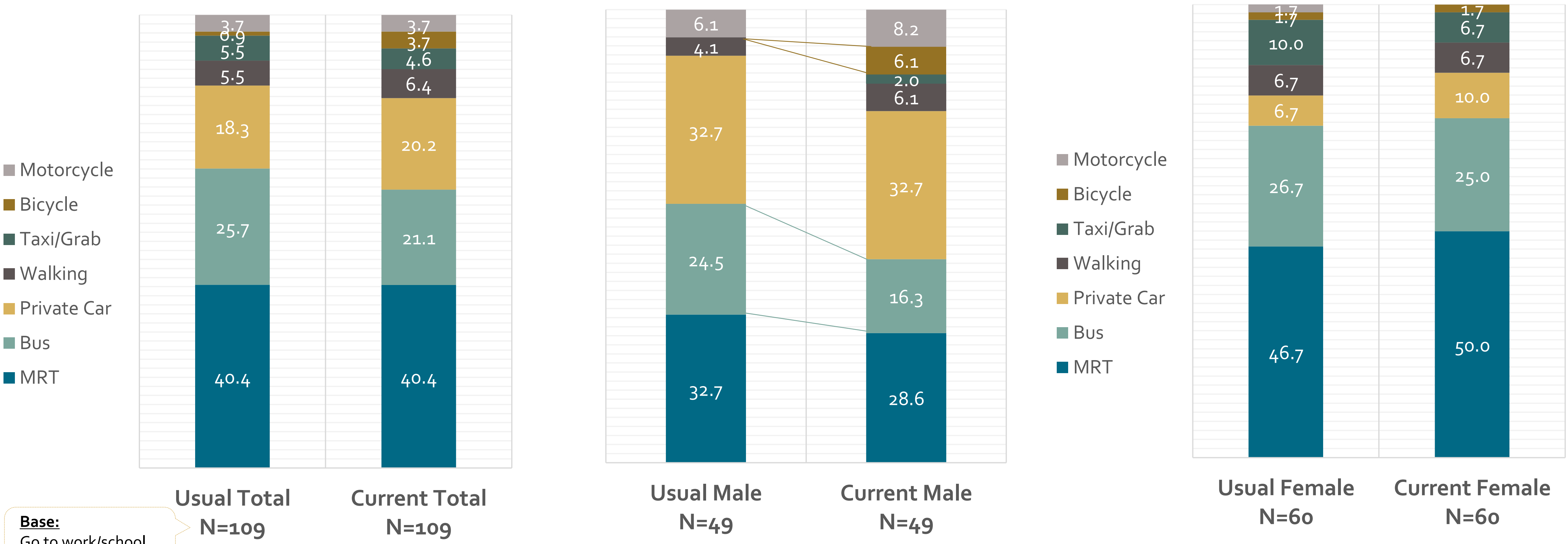
Kia-Su: Scare of Losing – Competitive
Kia-Si: Scare of Dying – Risk Adverse
Kia-SARS: Scare of SARs
– Reactive towards epidemics as memory of SARS epidemic is strong

"Singaporeans feel insecure easily
as we are a country with open borders and economy,
and rely on other countries for support and services"

TRANSPORTATION MEANS

Overall, there is no significant changes on the choice of transportation means. However there is a sharp decrease of Males who are taking [Bus]. At the same time, Male cyclists increased by 6.1% from 0%.

➢ ***The main means of transportation USUALLY / CURRENT use to commute (SA)***



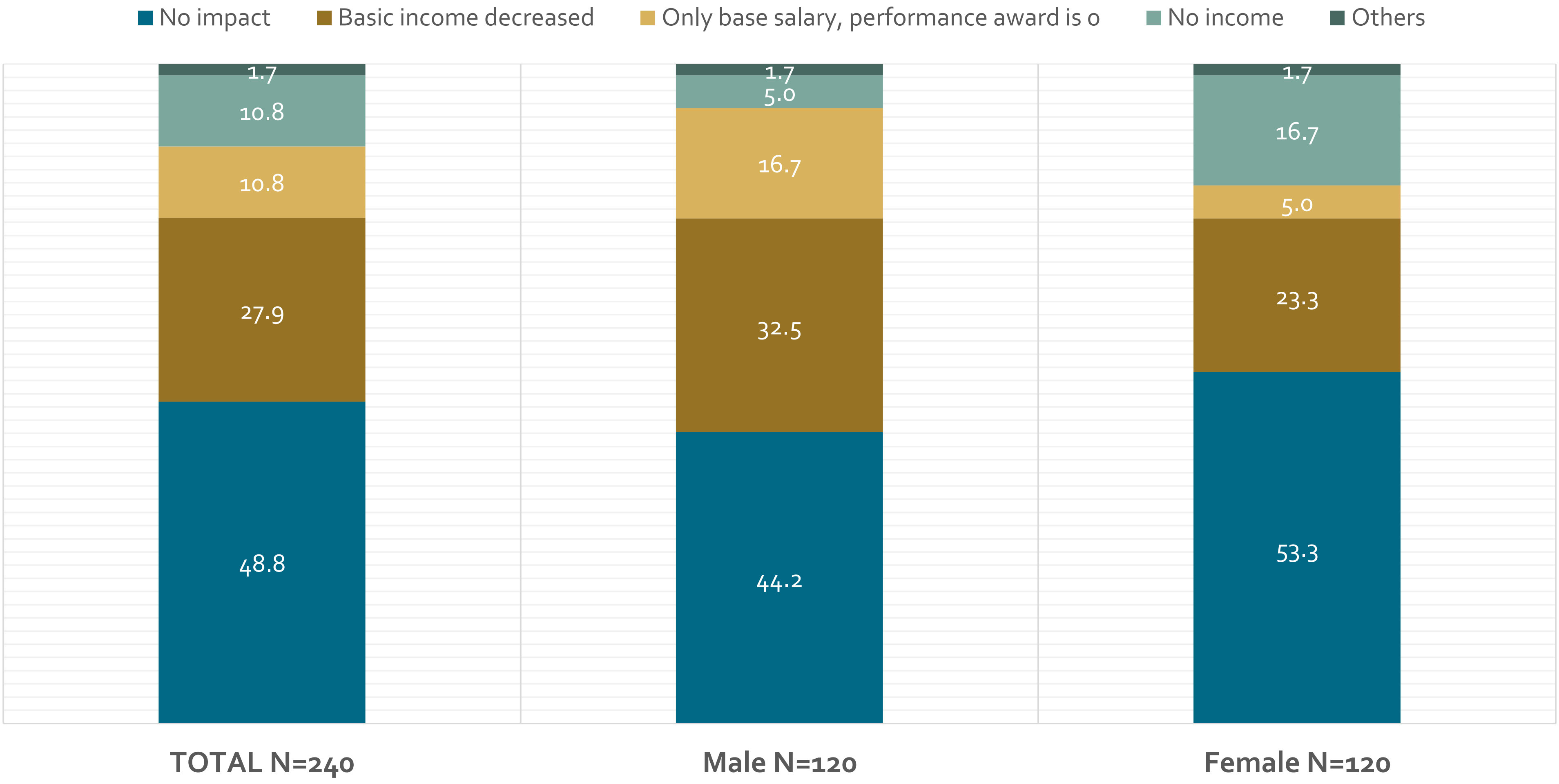
Base:
Go to work/school during Feb & Mar.

INCOME Near to 50% of Male has lesser income due to the following：

- 32.5% with basic income decreased and
- 16.7% with no performance award.

Female, on the other hand, was not as affected as the male with only 28.3% experiencing reduced income

➢ ***If current income affected by COVID-19 (SA)***



PART 02

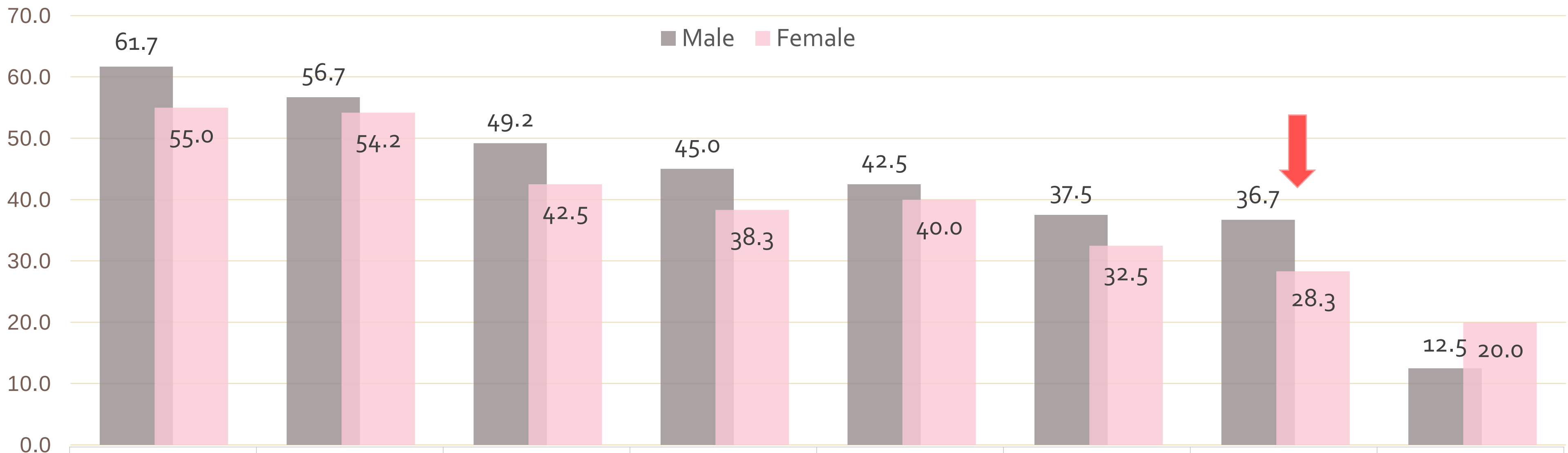
SHOPPING BEHAVIOUR

Item Bought / Desire / Purchase Volume / Frequency

ITEMS BOUGHT More than half purchased [hand sanitiser]&[face masks].

20s is the largest age group to buy these two items. Regardless of purchases, male bought more than female. The biggest gender difference in item bought is paper products. For the purchase of disinfection and hygienic products, the gap between Young adult (20s–30s) and Middle-aged adult (40s–50s+) is obvious.

➢ ***If bought any specific items during the Covid-19 outbreak (MA)***

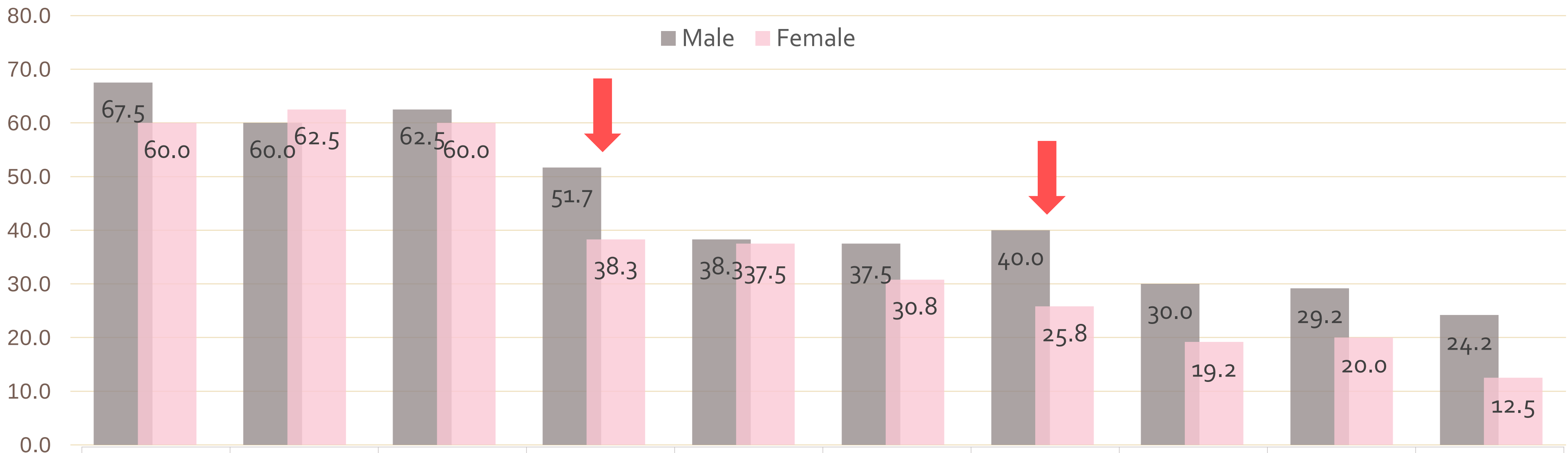


	N=	Hand Sanitiser	Face Masks	Groceries	Disinfectants (Alcohol Sprays, Antiseptic Disinfectant eg. Dettol.)	Hygenic Products (Soap, Body Wash etc.)	Instant Noodles	Paper Products (Toilet Paper, Tissues, Wet Tissues, Wet Wipes etc.)	Did not buy anything specifically for the Covid-19 outbreak
TOTAL	240	58.3	55.4	45.8	41.7	41.3	35.0	32.5	16.3
Male	120	61.7	56.7	49.2	45.0	42.5	37.5	**36.7**	12.5
Female	120	55.0	54.2	42.5	38.3	40.0	32.5	**28.3**	20.0
20s	60	**66.7**	**60.0**	48.3	**51.7**	**43.3**	38.3	33.3	13.3
30s	60	58.3	53.3	50.0	**50.0**	**55.0**	41.7	31.7	6.7
40s	60	56.7	56.7	41.7	38.3	35.0	31.7	40.0	20.0
50+	60	51.7	51.7	43.3	26.7	31.7	28.3	25.0	25.0

SOURCE OF INFORMATION

More than 60% are using digital media which are [News Website][Social Media][Government Websites] to find out about Covid-19. The most obvious differences between male and female are from [newspapers] and [friends]. For 20s, most popular source is [Social Media]. For 50+ , most popular source is [government websites] and [newspapers] and usage is significantly higher than other age groups.

➢ ***What sources of information make use of to find out about Covid-19 (MA)***

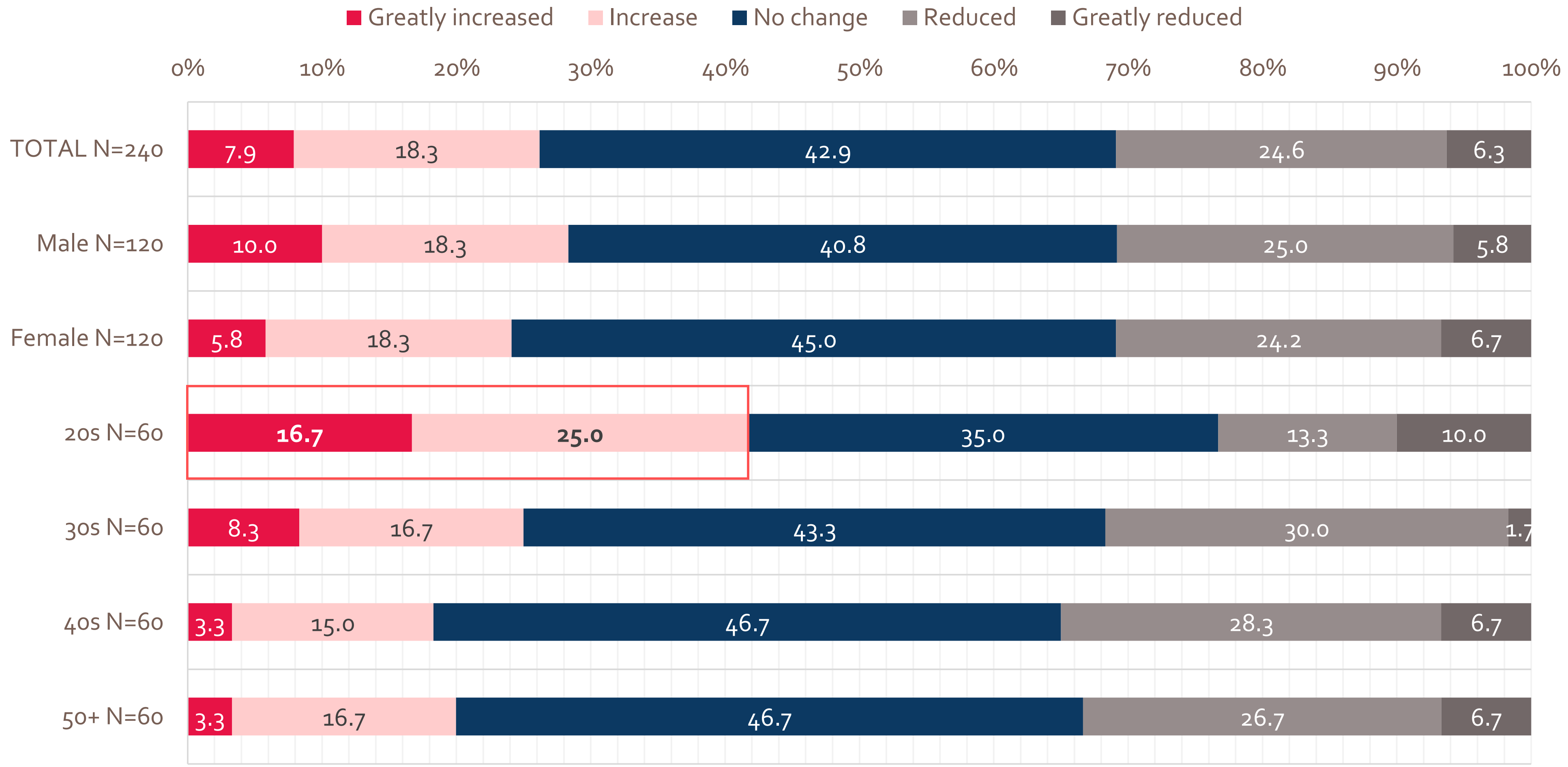


	N=	News Websites	Social Media	Government Websites	Newspapers	Messaging Apps (such as Line, Whatsapp, Telegram)	Family	Friends	Medical Websites	Radio	Healthcare Professionals
TOTAL	240	63.8	61.3	61.3	45.0	37.9	34.2	32.9	24.6	24.6	18.3
Male	120	67.5	60.0	62.5	51.7	38.3	37.5	40.0	30.0	29.2	24.2
Female	120	60.0	62.5	60.0	38.3	37.5	30.8	25.8	19.2	20.0	12.5
20s	60	58.3	**76.7**	60.0	35.0	30.0	33.3	31.7	28.3	18.3	20.0
30s	60	66.7	68.3	50.0	41.7	43.3	41.7	43.3	28.3	25.0	20.0
40s	60	51.7	50.0	56.7	45.0	33.3	35.0	28.3	26.7	31.7	15.0
50+	60	78.3	50.0	**78.3**	**58.3**	45.0	26.7	28.3	15.0	23.3	18.3

SHOPPING DESIRE ❶ On the whole, more than 40% has no change in shopping desire.

There is no significant difference between genders, however after age breakdown, we can see that the youngest age group -20s has the most growth in shopping desire.

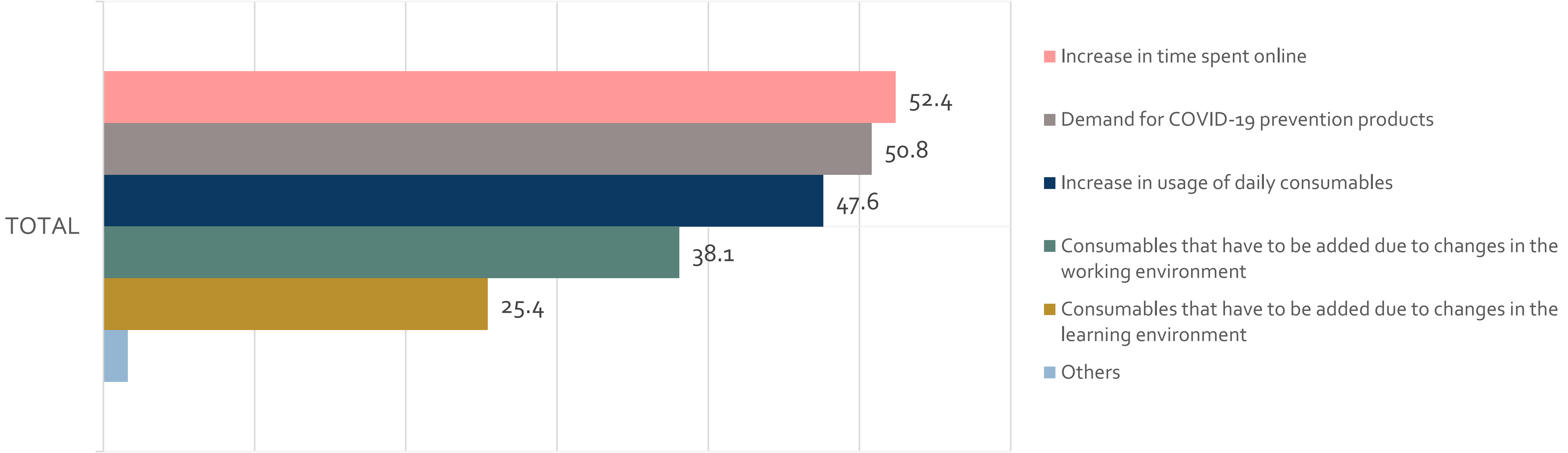
➢ ***Compared to normal times, how has your current shopping desire changed (SA)***



HIGHER SHOPPING DESIRE ❷

The most popular reason for the increase of shopping desire is the increase of online time(52.4%).This feature is most obvious in the youngest group - 20s. Another reason is the increased demand for preventive products(50.8%). Greater percentage of males than female buy preventive products

➤ ***What are the reasons to why your current shopping desire is Higher than usual (MA)*** **N=63**

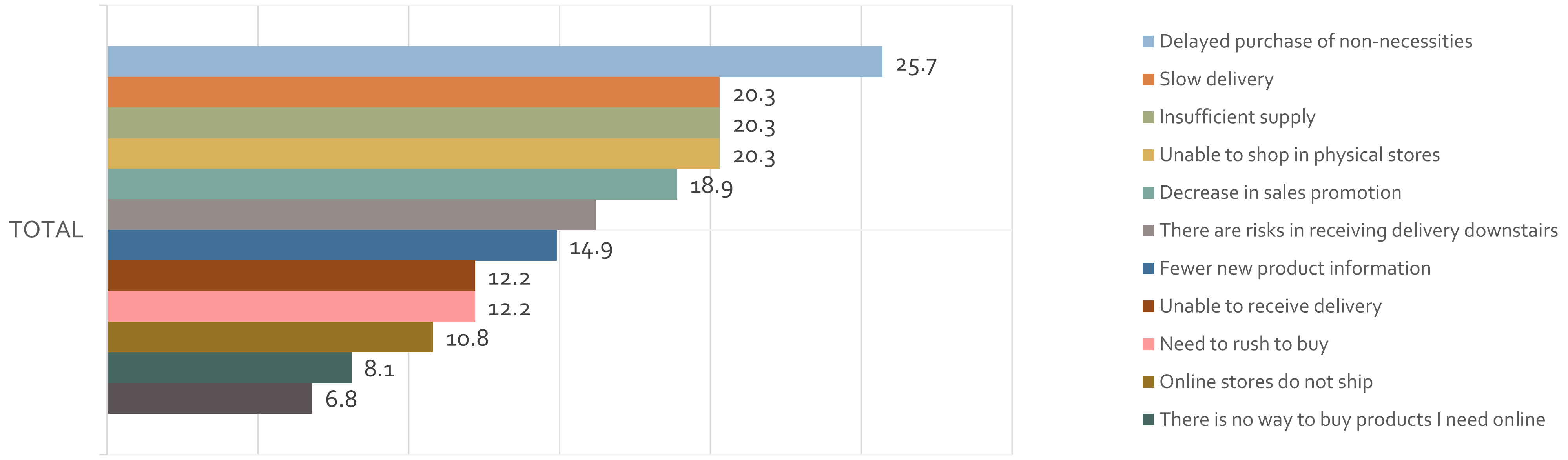


Base:T2B of 5 scale rating of shopping desire	N=	Increase in time spent online	Demand for COVID-19 prevention products	Increase in usage of daily consumables	Consumables that have to be added due to changes in the working environment	Consumables that have to be added due to changes in the learning environment	Others
TOTAL	63	52.4	50.8	47.6	38.1	25.4	1.6
Male	34	58.8	**64.7**	44.1	41.2	35.3	0.0
Female	29	44.8	34.5	51.7	34.5	13.8	3.4
20s	25	**68.0**	36.0	36.0	24.0	16.0	4.0
30s	15	46.7	53.3	53.3	60.0	46.7	0.0
40s	11	54.5	63.6	72.7	54.5	45.5	0.0
50+	12	25.0	66.7	41.7	25.0	0.0	0.0

LOWER SHOPPING DESIRE ❸ The most popular reason for the decrease of shopping desire is 25.7% of total delayed purchase of non-necessities.

Followed by the [slow delivery], [insufficient supply] and [unable to shop in physical stores]. Male is more afraid of going downstairs to receive delivery than female.

➢ ***What are the reasons to why your current shopping desire is Lower than usual (MA)*** N=74



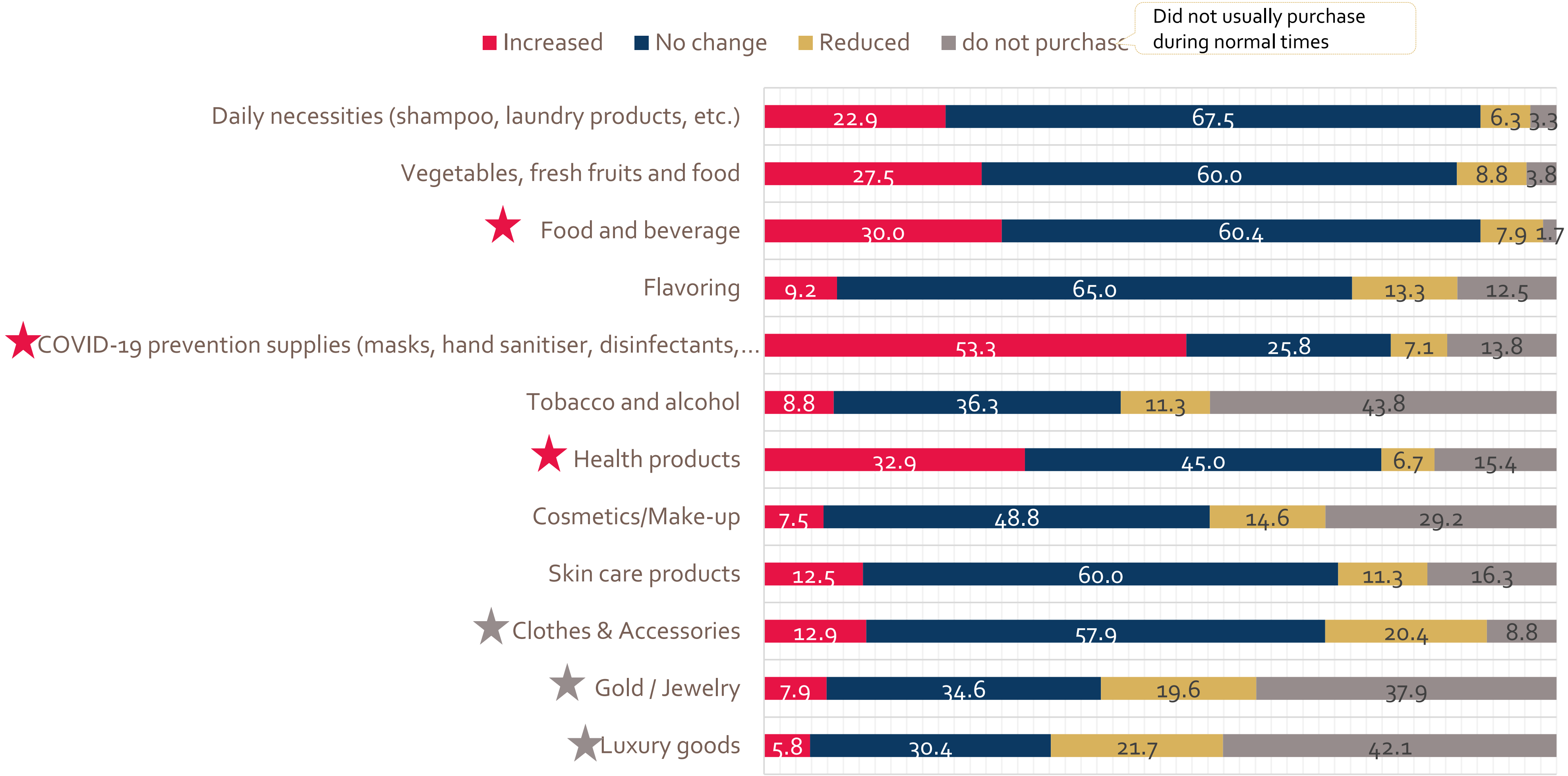
Base:B2B of 5 scale rating of shopping desire

	N=	Delayed purchase of non-necessities	Slow delivery	Insufficient supply	Unable to shop in physical stores	Decrease in sales promotion	There are risks in receiving delivery downstairs	Fewer new product information	Unable to receive delivery	Need to rush to buy	Online stores do not ship	There is no way to buy products I need online
TOTAL	74	25.7	20.3	20.3	20.3	18.9	16.2	14.9	12.2	12.2	10.8	8.1
Male	37	27.0	16.2	24.3	24.3	16.2	**21.6**	13.5	8.1	10.8	8.1	10.8
Female	37	24.3	24.3	16.2	16.2	21.6	10.8	16.2	16.2	13.5	13.5	5.4
20s	14	7.1	42.9	14.3	14.3	7.1	21.4	7.1	21.4	14.3	0.0	0.0
30s	19	21.1	21.1	36.8	21.1	21.1	42.1	15.8	15.8	26.3	21.1	15.8
40s	21	38.1	14.3	14.3	14.3	14.3	4.8	9.5	9.5	9.5	14.3	9.5
50+	20	30.0	10.0	15.0	30.0	30.0	0.0	25.0	5.0	0.0	5.0	5.0

PURCHASE VOLUME More than half of increased purchasing [COVID-19 prevention supplies].

Around 30% increased the purchase of [Health products] and [Food and beverage]. During the outbreak, the purchase of valuables-[Luxury Goods][Gold/Jewelry] and [Clothes & Accessories] decreased greatly.

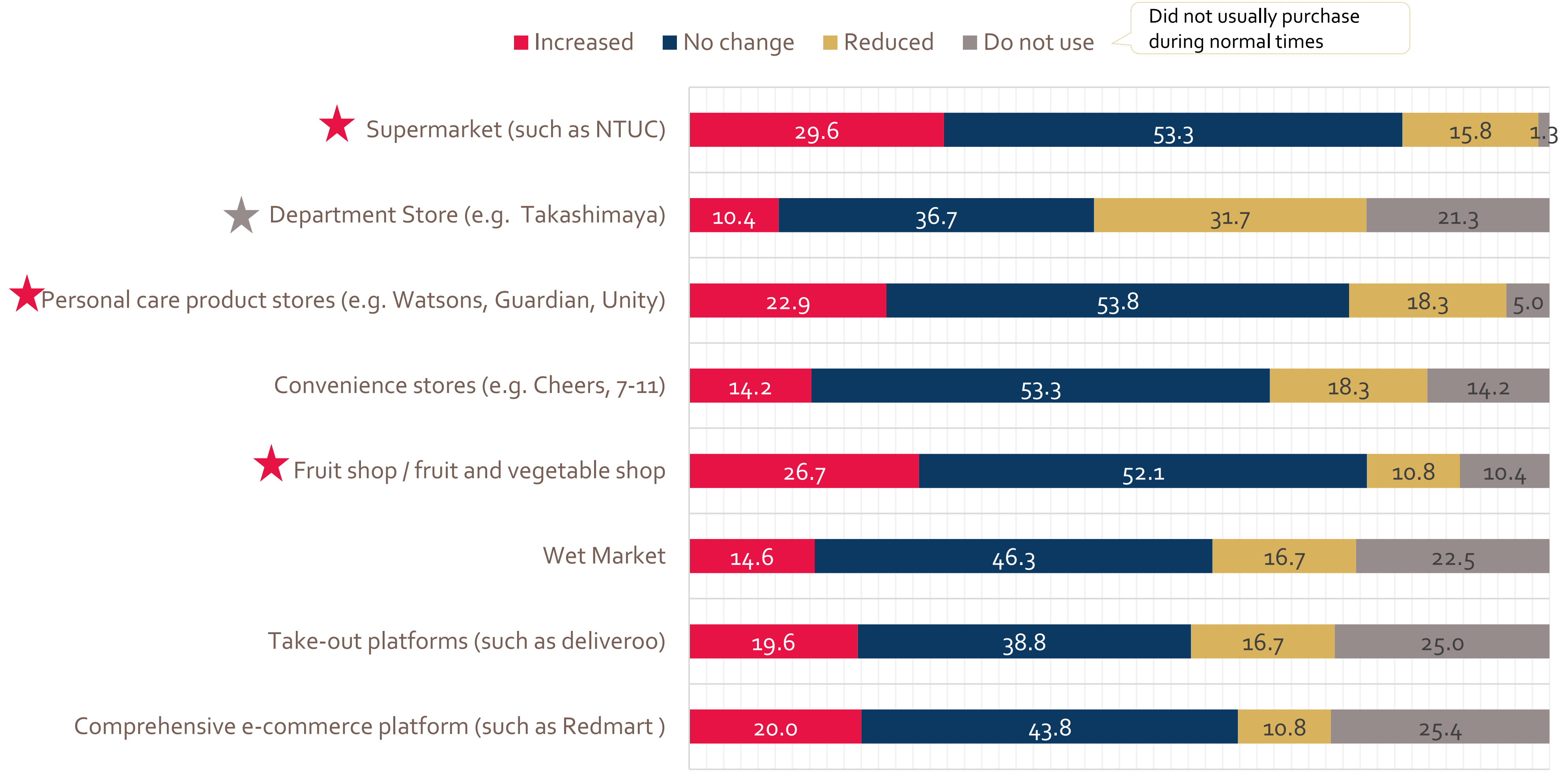
➢ ***Compared to normal times, how has the purchase volume changed for the following product categories (SA)*** N=240



PURCHASE FREQUENCY ❶

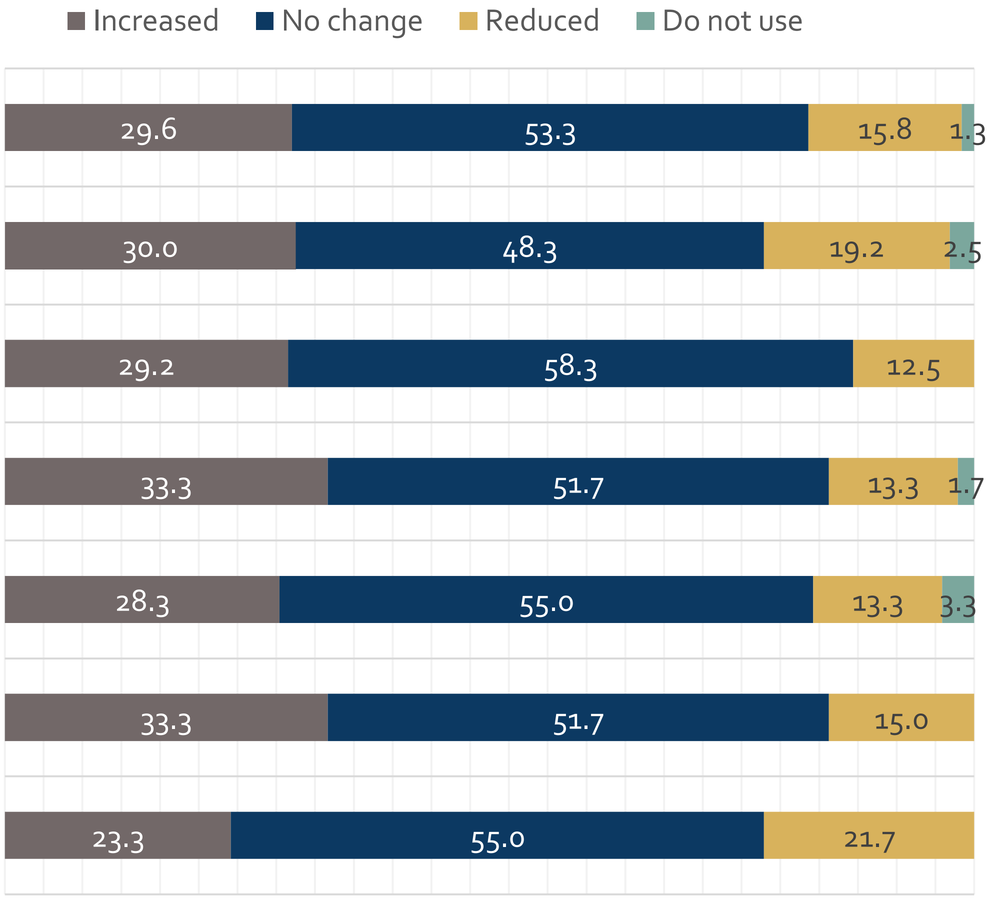
Overall, the frequency of shopping in supermarkets, fruit stores has increased more than 25% . On the other hand, 31.7% reduced frequency of shopping in department store.

➢ ***Compared to normal times, how has the purchase volume changed for the following product categories (SA)*** N=240

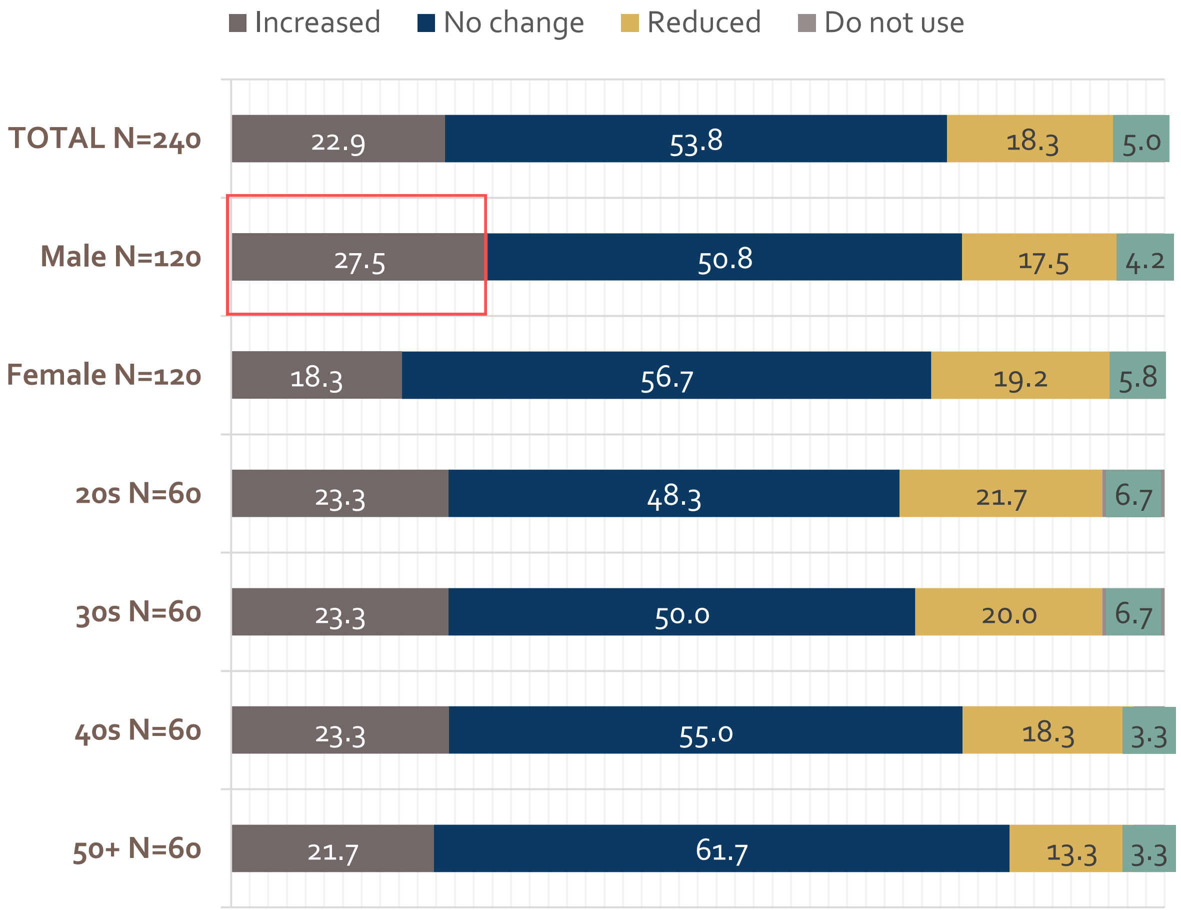


FREQUENCY ❷ In terms of purchase frequency in supermarket, the increase in the age groups 20s & 40s are higher than 30s & 50+. Males has a greater increase of purchase frequency in personal care products stores than females.

➢ ***Supermarket** (such as NTUC)*

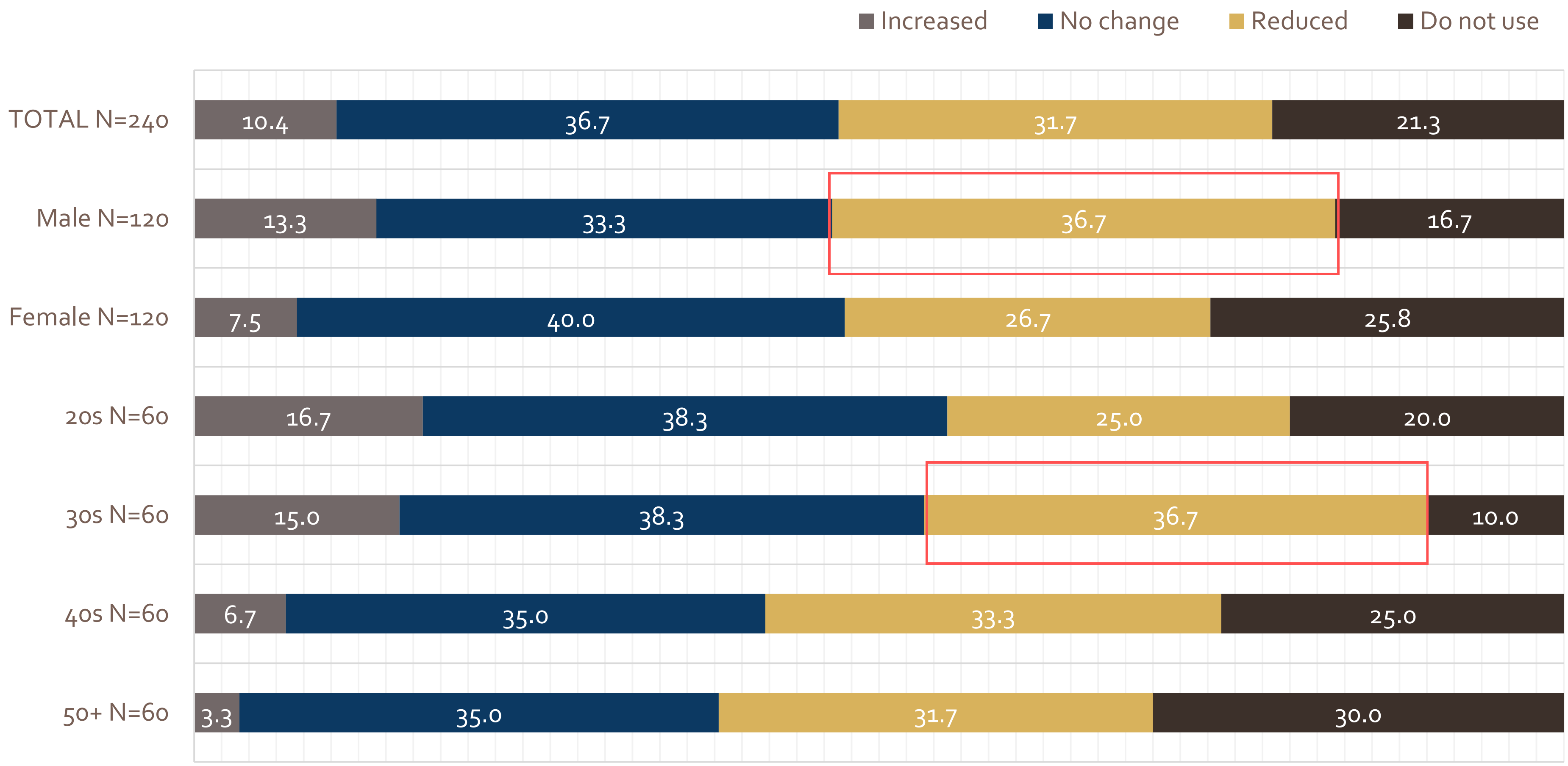


➢ ***Personal care product stores** (e.g. Watsons, Guardian, Unity)*



FREQUENCY ❸ The percentage of male who reduced the frequency of going to department stores is 36.7%, which is 10% more than female. Across age groups, 30s who went to department store decreased significantly compared with other age groups, which is 36.7%.

➢ ***Department Store** (e.g. Takashimaya)*



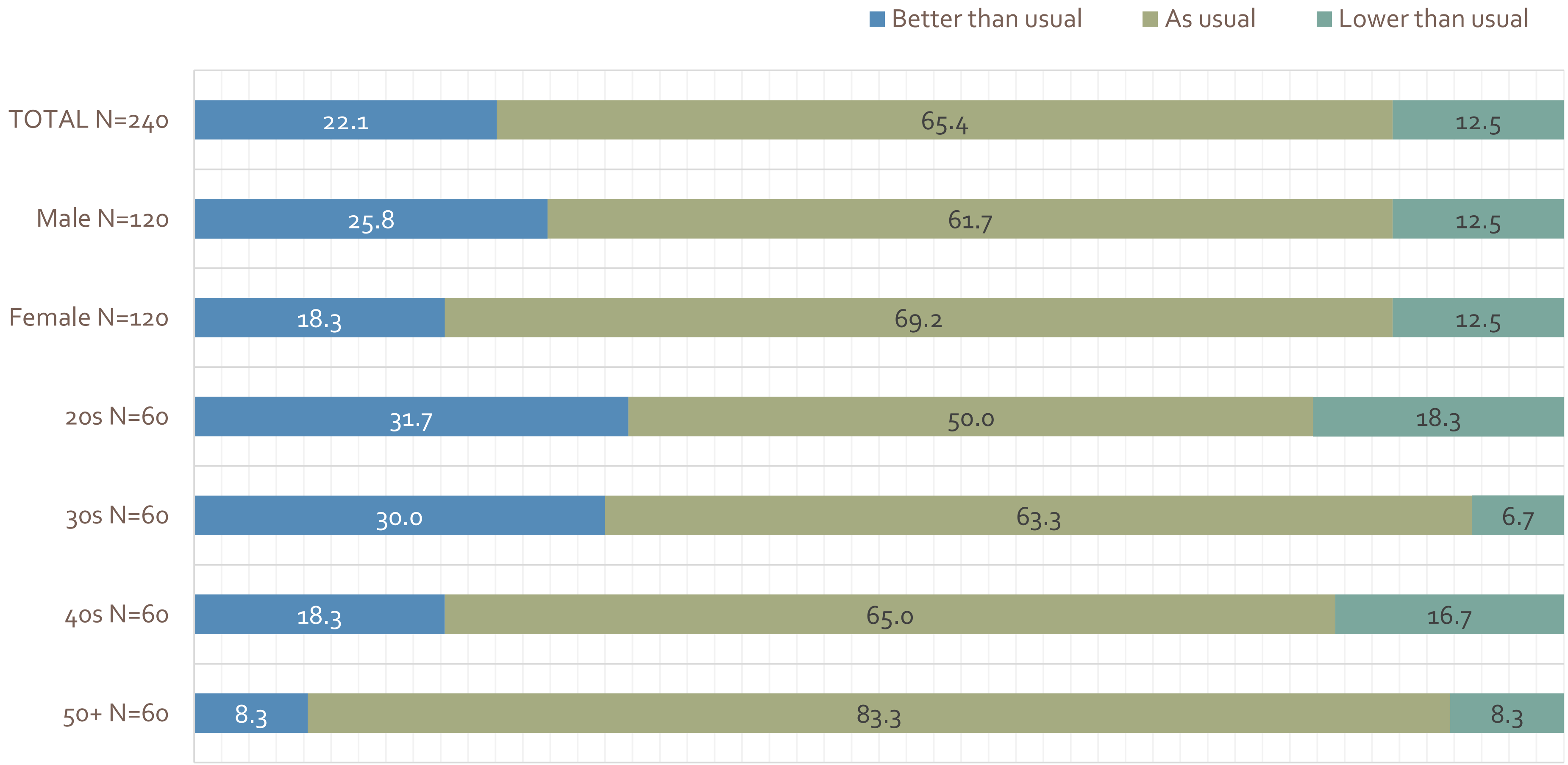
PART 03

PLANS AFTER Covid-19

Item Bought / Desire / Purchase Volume / Frequency

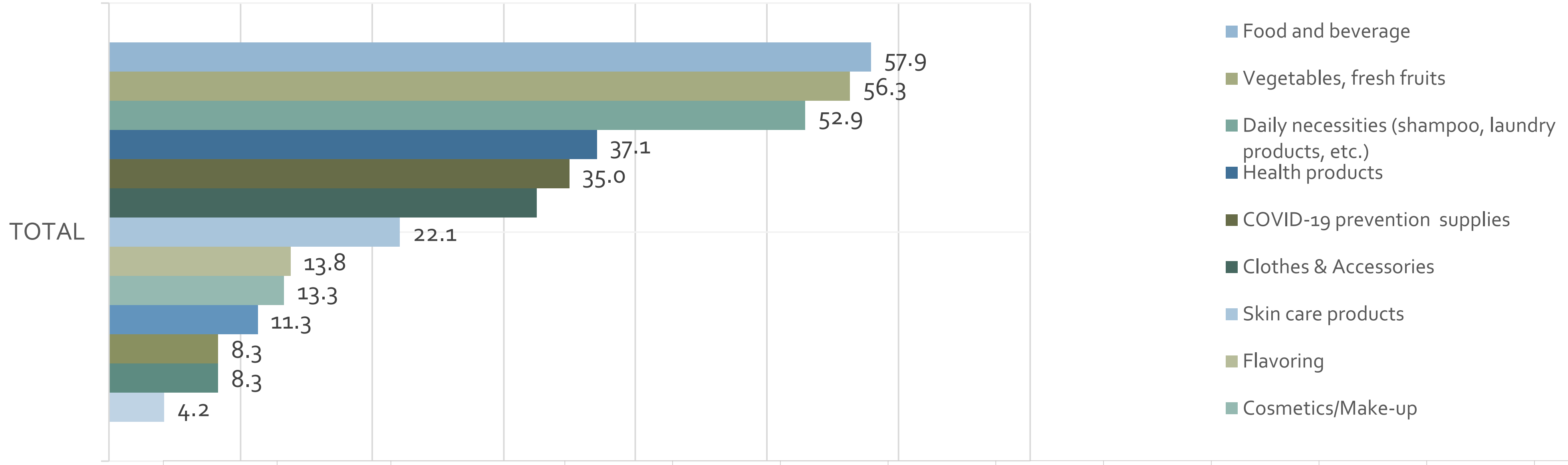
SHOPPING WILLINGNESS Overall, more than 65% of total's shopping willingness will not change(as usual) after the epidemic. More Male and Young adult (20s-30s) anticipate [better than usual] shopping willingness than Female and Middle-aged adult (40s-50+).

➢ ***After the epidemic, how do you think your willingness to shop will change compared to usual? (SA)***



ITEM TO PURCHASE More than half would like to purchase [food and beverage][vegetables, fruits][daily necessities] after the epidemic. Excluding [Skin care] & [Cosmetics], the percentage of Males is higher than Females in each product category. Especially for COVID-19 prevention supplies, Male is 15% higher than Female.

➢ ***What kind of products would you like to purchase after the epidemic (MA)***

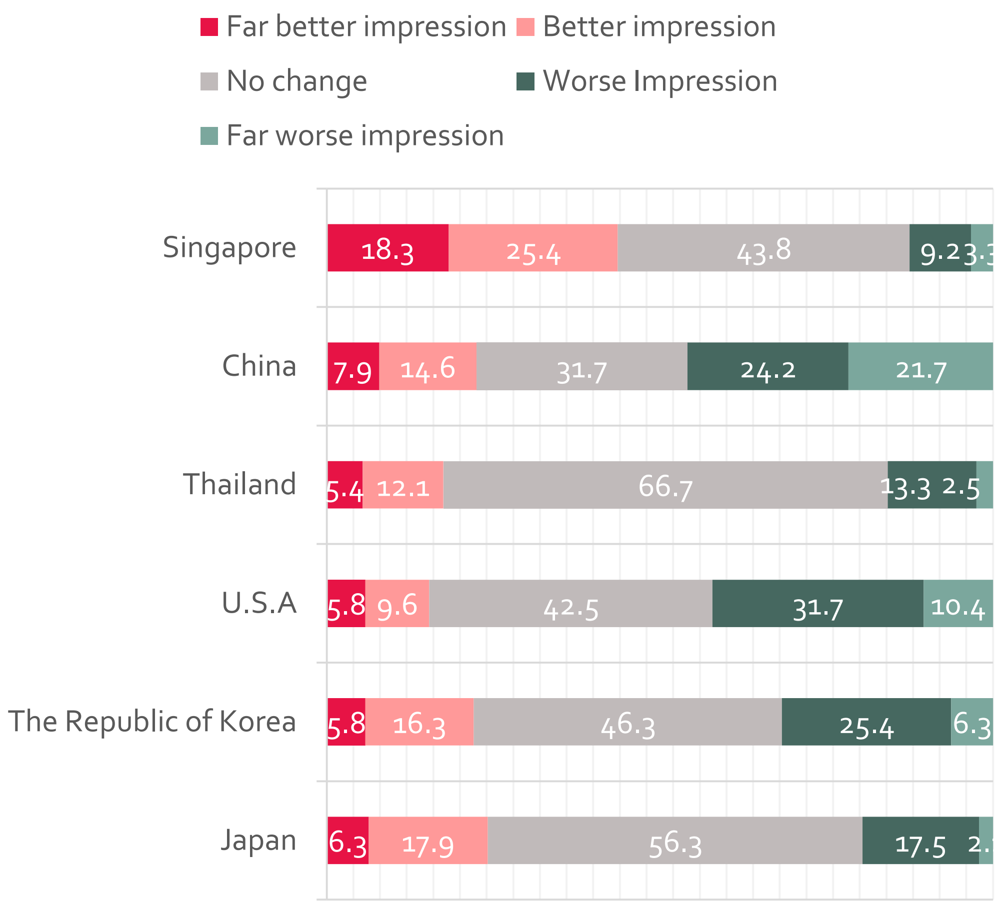


	N=	Food and beverage	Vegetables, fresh fruits	Daily necessities (shampoo, laundry products, etc.)	Health products	COVID-19 prevention supplies	Clothes & Accessories	Skin care products	Flavouring	Cosmetics/ Make-up	Tobacco and alcohol	Gold / Jewellery	Luxury goods	Others
TOTAL	240	57.9	56.3	52.9	37.1	35.0	32.5	22.1	13.8	13.3	11.3	8.3	8.3	4.2
Male	120	60.8	60.8	58.3	41.7	**42.5**	33.3	20.8	18.3	10.8	13.3	10.0	11.7	4.2
Female	120	55.0	51.7	47.5	32.5	27.5	31.7	23.3	9.2	15.8	9.2	6.7	5.0	4.2
20s	60	61.7	63.3	53.3	40.0	35.0	30.0	23.3	10.0	11.7	15.0	8.3	5.0	3.3
30s	60	66.7	58.3	58.3	30.0	36.7	38.3	23.3	28.3	20.0	13.3	13.3	13.3	0.0
40s	60	48.3	48.3	43.3	35.0	40.0	21.7	21.7	10.0	13.3	11.7	8.3	8.3	10.0
50+	60	55.0	55.0	56.7	43.3	28.3	40.0	20.0	6.7	8.3	5.0	3.3	6.7	3.3

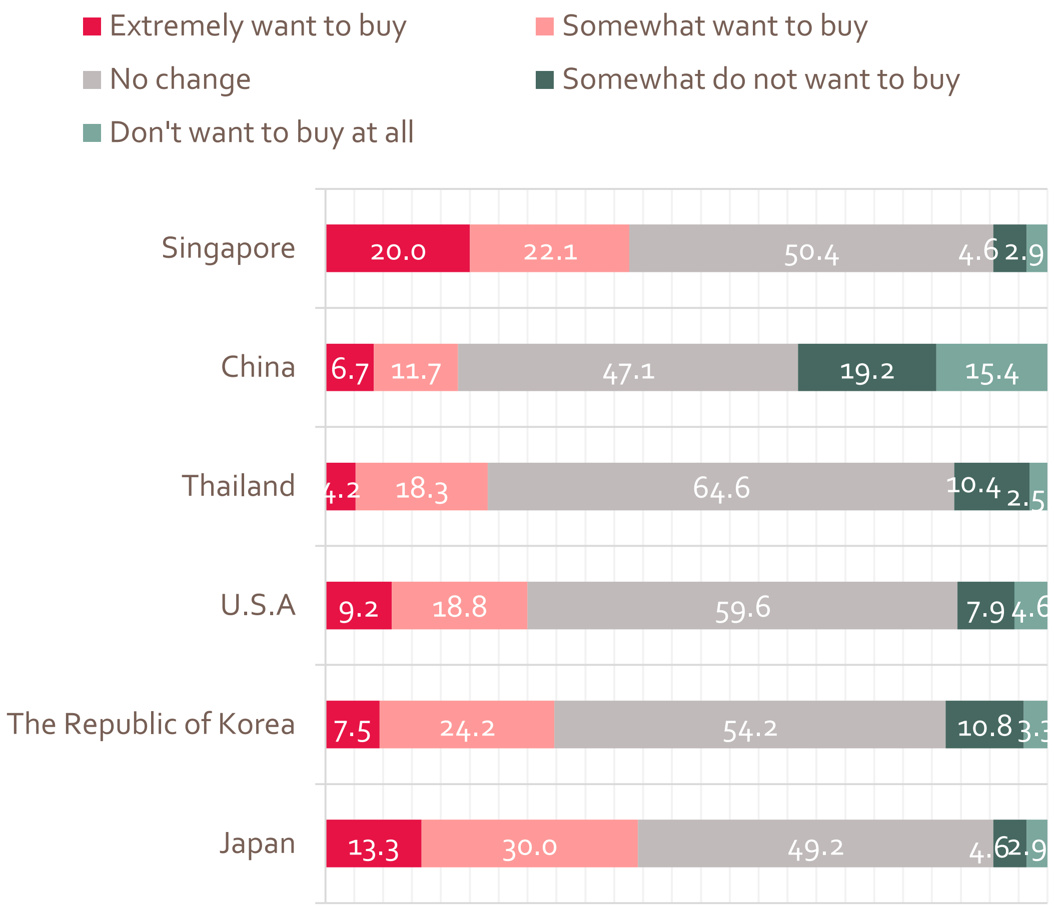
COUNTRY IMPRESSION N=240

Impressions of China/USA/The Republic of Korea have higher percentage of negative impressions than positive impressions.

- *Change in country impressions after Covid-19 (SA)*



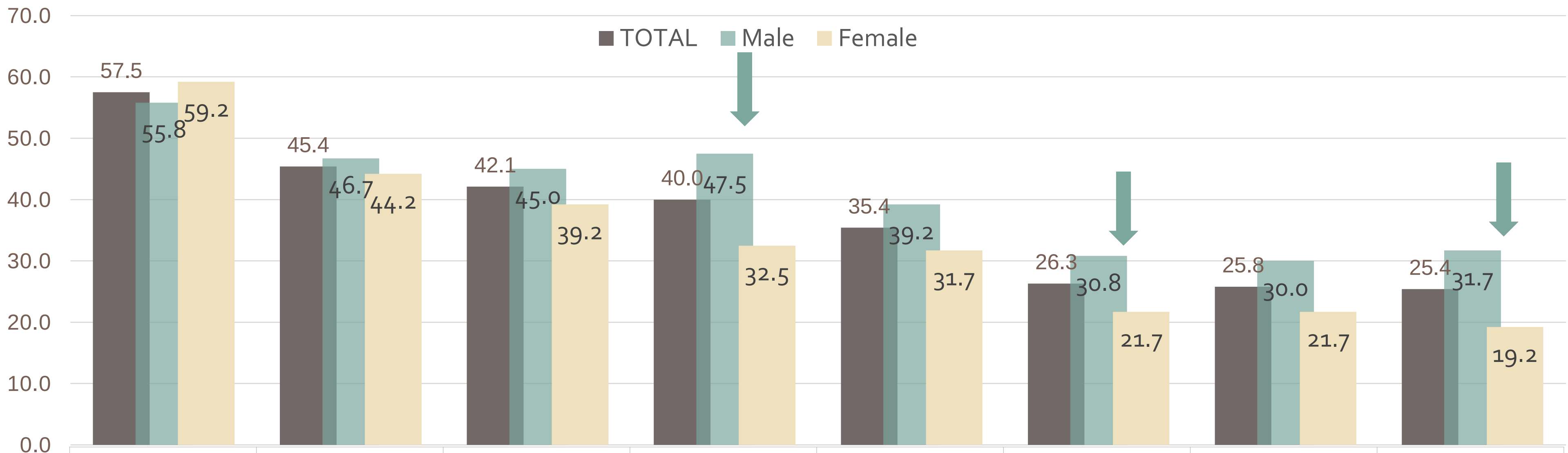
- *If like to buy from these countries after Covid-19(SA)*



ACTIVITIES TO DO After the outbreak, almost 60% would like to travel abroad.

Among which, the percentage of Female is slightly more than Male. Older age groups (40s-50+) is obviously more than Younger age groups(20s,30s) . For activities of [go to restaurant][local tourism][fitness/exercise], the percentage of male far exceeds that of female. Younger age groups(20s-30s) who want to do [online shopping] and [local tourism] are two times as Older age groups(40s,50+).

➢ ***Activities like to do after Covid-19 (MA)***

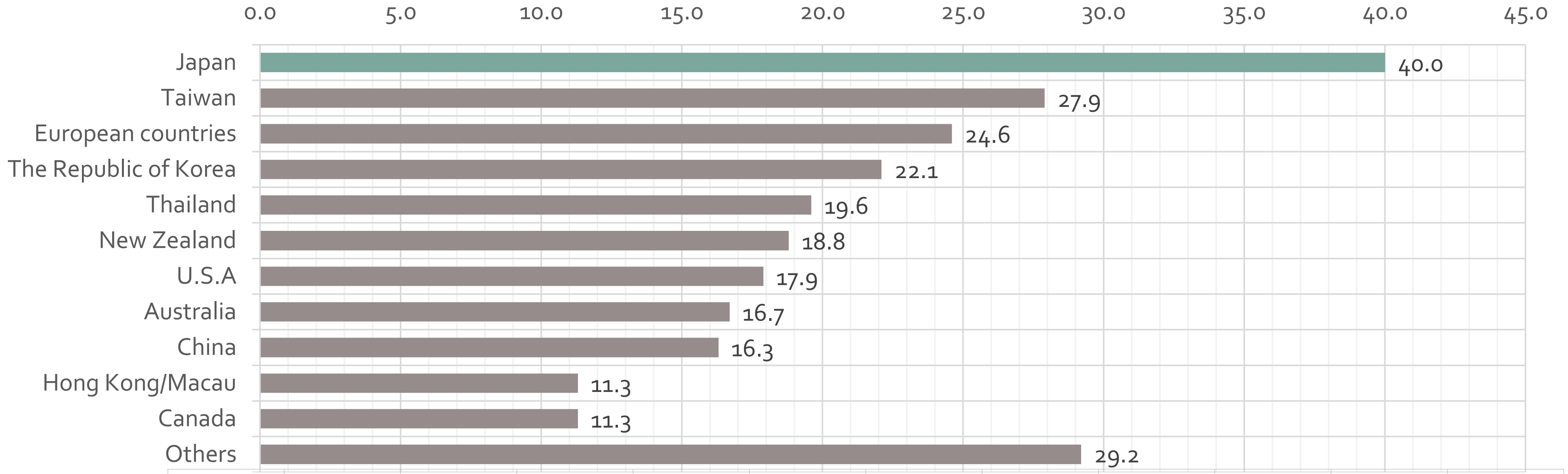


	N=	Overseas travel	Meet-up with friends	Shopping in physical stores and other places	Go to the restaurant	Watch movie	Fitness / exercise	Online shopping	Local tourism
TOTAL	240	**57.5**	45.4	42.1	40.0	35.4	26.3	25.8	25.4
Male	120	55.8	46.7	45.0	**47.5**	39.2	**30.8**	30.0	**31.7**
Female	120	59.2	44.2	39.2	32.5	31.7	21.7	21.7	19.2
20s	60	58.3	43.3	31.7	28.3	28.3	33.3	**31.7**	**28.3**
30s	60	50.0	56.7	43.3	45.0	43.3	28.3	**36.7**	**40.0**
40s	60	61.7	33.3	43.3	36.7	38.3	25.0	25.0	21.7
50+	60	60.0	48.3	50.0	50.0	31.7	18.3	10.0	11.7

COUNTRIES TO VISIT

Regardless of gender and age, Japan is the most popular country.

➢ ***Which countries would like to visit (MA)***



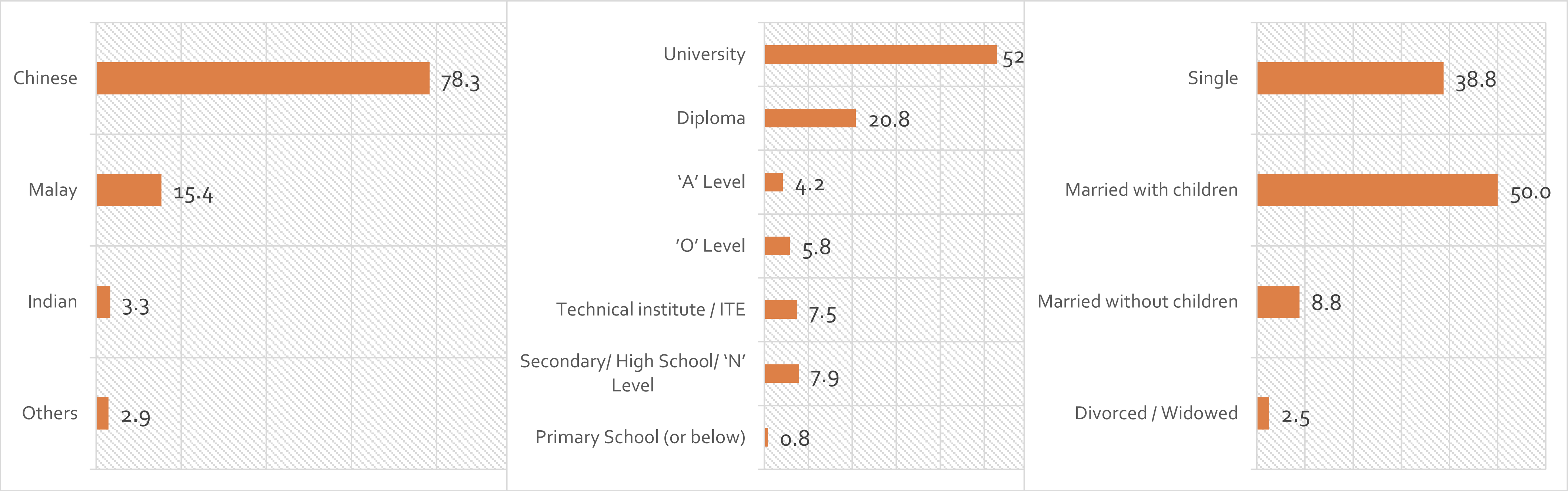
	N=	Japan	Taiwan	European countries	The Republic of Korea	Thailand	New Zealand	U.S.A	Australia	China	Hong Kong/Macau	Canada	Others
TOTAL	240	40.0	27.9	24.6	22.1	19.6	18.8	17.9	16.7	16.3	11.3	11.3	29.2
Male	120	41.7	24.2	23.3	16.7	25.8	17.5	24.2	18.3	21.7	12.5	15.8	31.7
Female	120	38.3	31.7	25.8	27.5	13.3	20.0	11.7	15.0	10.8	10.0	6.7	26.7
TOTAL	240	40.0	27.9	24.6	22.1	19.6	18.8	17.9	16.7	16.3	11.3	11.3	29.2
20s	60	40.0	25.0	30.0	31.7	20.0	13.3	30.0	15.0	11.7	11.7	16.7	35.0
30s	60	46.7	38.3	33.3	30.0	20.0	20.0	15.0	18.3	21.7	16.7	13.3	30.0
40s	60	46.7	25.0	21.7	11.7	26.7	15.0	18.3	13.3	18.3	11.7	10.0	28.3
50+	60	26.7	23.3	13.3	15.0	11.7	26.7	8.3	20.0	13.3	5.0	5.0	23.3

PART 04

DEMOGRAPHIC

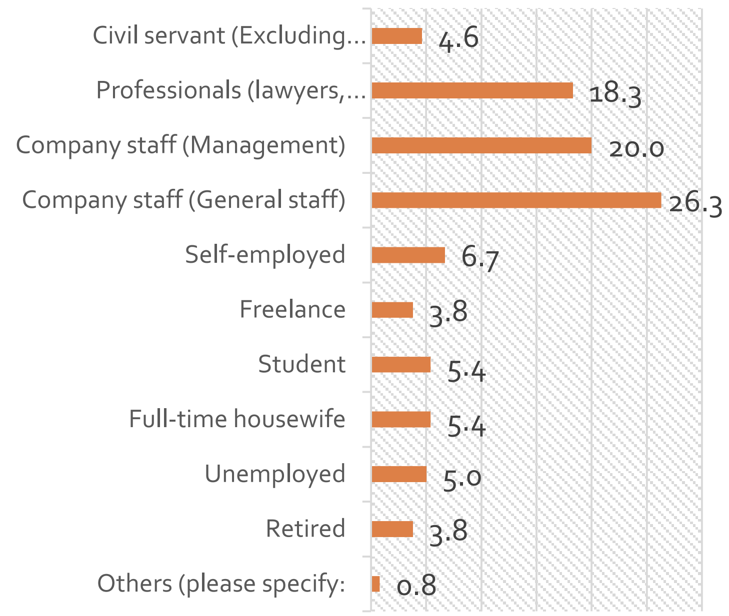
Ethnicity / Education / Marital Status
Occupation / Industry / MHI

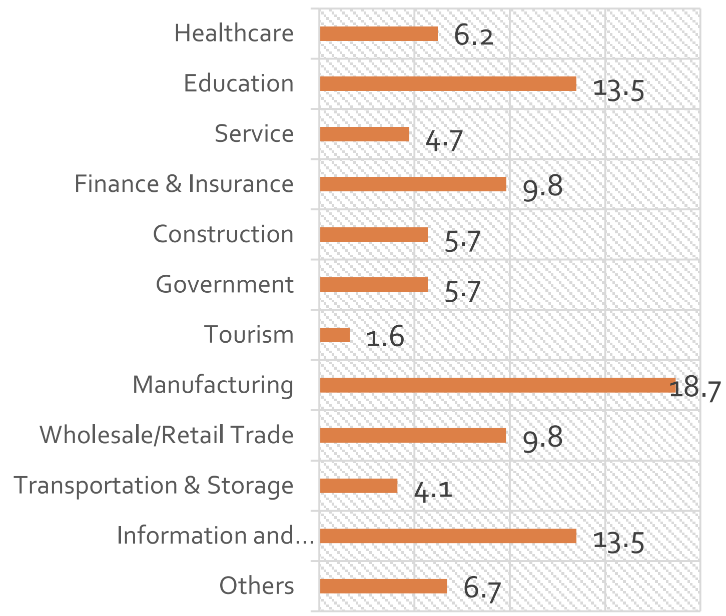
PANELIST PROFILE 1

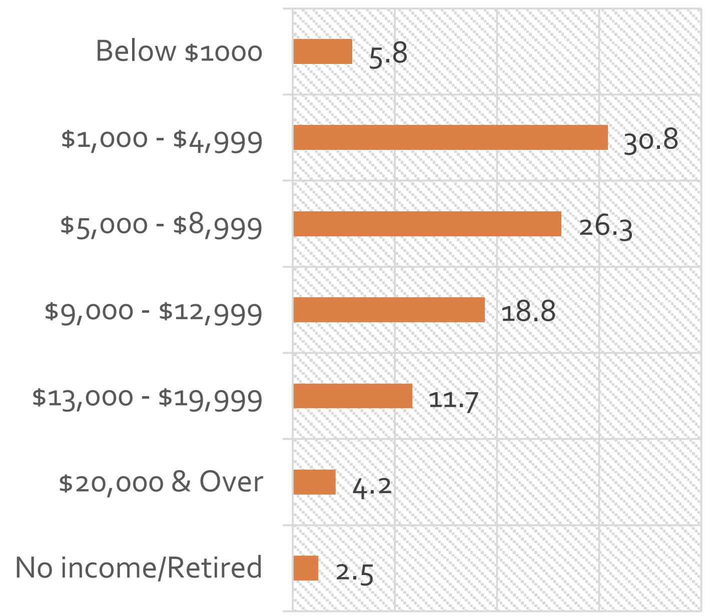


ETHNICITY	EDUCATION	Marital Status
N=240	N=240	N=240

PANELIST PROFILE 2







Occupation

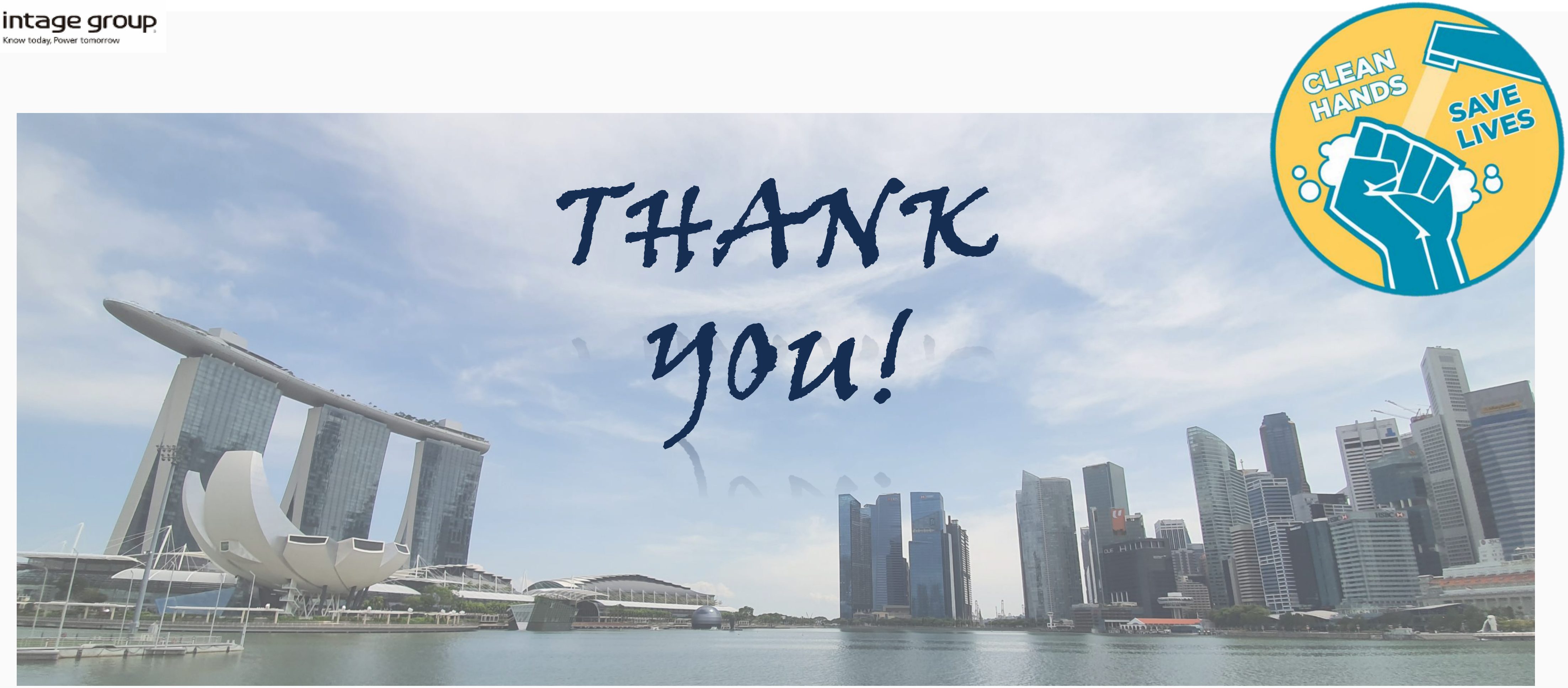
N=240

Industry

N=193

Monthly Household Income

N=240


THANK
YOU!
CLEAN
HANDS
SAVE
LIVES