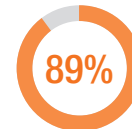


Coronavirus and Its Impact: Upending Our Lives



I have cancelled/
postponed my
holiday travel plans



I have lost money by
cancelling/postponing
my travel plans



The global impact of the coronavirus pandemic is already hitting Singaporeans in their pockets. According to our March YKA survey, 89% of Singaporeans say they have had to cancel holiday travel plans and one in four (25%) claim they have lost money by doing so.

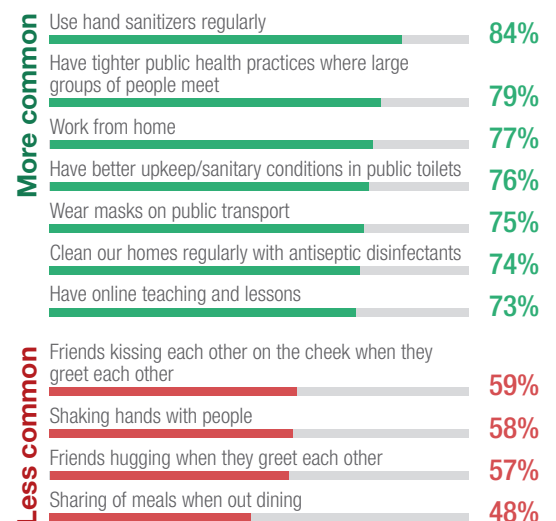
This comes as Singaporeans also review what were once normal everyday habits. Asked how they think norms of behaviour will change, 77% say there will be more home working and 73% expect education to be delivered online.

People also believe personal hygiene practices will change, with 75% saying masks on public transport will become more common, 84% expecting an increased use of hand sanitisers and 74% foreseeing an increase in home disinfection. Ahead, three in four (76%) think public toilets will be maintained in a better, more sanitary condition in the future.

Singaporeans also believe public courtesy and PDA will be affected with 58% expecting a reduction in hand shaking and 48% seeing a future with less meal sharing when dining out. Even hugs and French-style affection maybe out of bounds - 59% expect to see less cheek kissing when greeting people and 57% think hugs will be harder to come by.

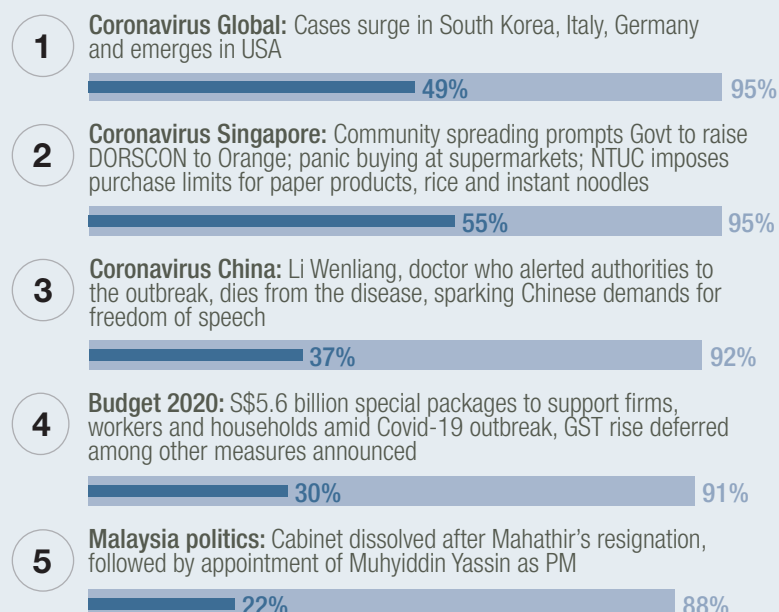
For those seeking solace in God at this difficult time, 79% expect better public health practices in churches and other places where groups gather, such as conferences or sporting events.

Will following become more or less common?



Singapore's Top 5 News Stories of the Month

■ % Who Followed the News
■ % Who Paid Close Attention



COMMUNITY SATISFACTION

Those who say they are satisfied with the way things are going in Singapore

Feb
75 > Mar
74

Community Satisfaction
down by 1 point



PERSONAL FINANCES

Those who rate their personal finances as Excellent/Good

Feb
66 > Mar
63

Personal Finances down
by 3 points



NATIONAL ECONOMY

Those who rate current economic conditions in Singapore as Excellent/Good

Feb
67 > Mar
64

National Economy down
by 3 points

Coronavirus and Its Impact: Local Responses

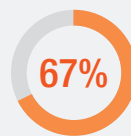


What would you do, if you were to develop flu symptoms now?

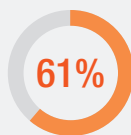


Public Health Preparedness Clinics (PHPCs)

I am aware of PHPCs



I know that the Govt is encouraging us to go to PHPCs if I have flu symptoms



The Singapore Government is among those lauded worldwide for its pandemic action, but people are aware this is no time to be complacent. More than three in four Singaporeans (78%) are fully expecting a second wave of the infection in Singapore in the months ahead.

The Government has been pressing people to use its Public Health Preparedness Clinics (PHPCs) as a first line of reporting and for medical assistance in this crisis and to avoid Hospitals initially. Although two in three Singaporeans (67%) are now aware of PHPCs, this drops to 46% amongst those under 25 years of age. This indicates more may need to be done via social channels to keep the young better informed.

Over six in ten Singaporeans (61%) are aware that PHPCs are the place they should go if they have flu-like symptoms and 58% know that treatments and consultations here are well subsidised for Singaporeans and Permanent Residents.

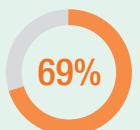
How do Singaporeans react to getting COVID-19? On getting flu-like symptoms, a third (33%) say they will stay at home and monitor the situation for a day or two while 31% say they would immediately go to a GP or polyclinic. Only 11% say their first stop would be to go to a hospital while 24% would go direct to a PHPC in accordance with government advice.

Men, at 15%, are almost twice as likely to make a hospital their first stop if they suspect infection, than women (8%). 15-24-year-olds, with the lowest level of awareness of PHPCs, are least likely to attend, with only 7% saying they would do so.

Post Corona: A New Kind of Healthcare



I am more likely to use mobile medicine services than going to see a GP



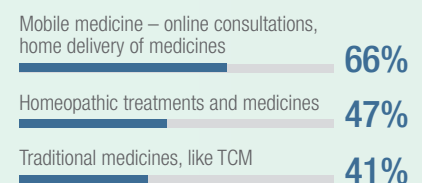
Singaporeans' expectations of healthcare services have evolved in the last decade and are changing even more in the face of the current viral crisis. So what can we expect to see emerging?

Alternative medicine is truly back in vogue, with 41% of people foreseeing a rise in reliance on Traditional Chinese Medicine. Nearly half (47%) also expect a rise in reliance on homeopathy, a set of treatments that has never been proven to improve any condition effectively, beyond the placebo effect.

More tellingly, perhaps, two thirds of Singaporeans (66%) expect an increase in the use of mobile medicine or "telecare", where consultations are delivered through video calls and prescription drugs are delivered.

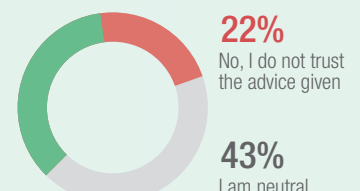
While 69% say they are likely to use telecare in the future, as an alternative to going to the GP, the jury is still out when it comes to trust. Although 35% would trust medical advice delivered this way, 22% state they would not. Significantly, 43% remain uncertain indicating the likelihood of a major level of public education, communication and marketing down the road.

COVID-19 has made it more likely for me to rely on...



Trust in a GP's advice delivered through a video call

35%
Yes, I trust the advice given



Government Satisfaction Index

The GSI was up 2 points in March from February. Housing and care for the elderly are now up 5 points YOY and civil rights/free speech is also up as we enter election season. But jobs is down 7 points since this time last year. There was no dent made on cost of living which still sits bottom of the scale, despite the recent Budget handouts.

GOVERNMENT SATISFACTION INDEX

Monthly
Index **82** GSI

Monthly
Trend **+2**

About the Results

Each month Blackbox conducts interviews with a representative sample of 1,000 Singaporeans. We use a geographically stratified online sample. Our methodology also applies quota controls to ensure representative demographic coverage of the population. If you would like to purchase customised questions for your organisation or want to dig into our historical general community data/demographic information, please contact chris@blackbox.com.sg for assistance.

Rank	Issue	Satisfaction with Government	Change since last month	Change over last 12 months
1	Defence/ national security	97%	1%	3%
2	Crime levels	97%	1%	0%
3	Racial relations/ integration	93%	-1%	0%
4	Education system	93%	1%	1%
5	The environment	92%	0%	-2%
6	Care for the Elderly	91%	1%	5%
7	Moral standards	89%	1%	2%
8	Health insurance/protection	87%	0%	4%
9	Public transport	84%	0%	-3%
10	Management of the economy	84%	0%	0%
11	Taxes	82%	1%	2%
12	Government accountability	80%	0%	4%
13	Civil rights/ liberties/ free speech	80%	3%	6%
14	Level of salaries and wages	77%	-1%	4%
15	CPF/pensions	76%	1%	3%
16	Housing affordability	74%	1%	5%
17	Jobs and unemployment	72%	-1%	-7%
18	Population management	74%	2%	0%
19	Motor vehicle prices/ COE	72%	1%	4%
20	Gap between rich and poor	68%	0%	3%
21	Cost of living	55%	0%	-5%
Overall Government Satisfaction Index		82	+2	+1

Who We Are

Blackbox Research is an award-winning Singapore based agency specialising in communications insights. We provide advanced research, analytics and digital intelligence services for both public sector and commercial clients. Our team has expertise covering market research, strategic communications and messaging, advertising and public policy.

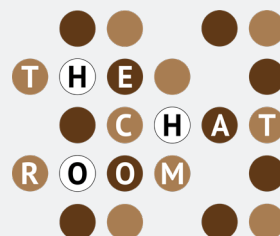
YouKnowAnot

YouKnowAnot is our monthly community survey platform that has been running since 2013. We interview a representative sample of 1,000 Singaporeans every month. We now use a geographically stratified online sample. Our methodology also applies quota controls to ensure representative demographic coverage of the population. If you would like to purchase customised questions for your organisation or want to dig into our historical general community data/demographic information, please contact chris@blackbox.com.sg for assistance.

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Blackbox Research introduces Singapore's first inspiration laboratory – the Chat Room. Primarily designed for focus group discussions, The Chat Room is a creative space that brings people together. The inviting and relaxed atmosphere allows companies and brands to connect with consumers in meaningful conversations.

For more information, visit thechatroom.com.sg