



Government Satisfaction Index

82 SEP
83 AUG

With DBS recently reporting that 1/3 of its customers had negative cash flow between Jan-June it is possible this cut in income is starting to bite. Satisfaction in managing the wealth gap fell 6 points in September. Satisfaction with care for the elderly dropped 5 points although it is still 2 points higher than it was 12 months ago.

	Government Satisfaction	Change since last month	Change over last 12 months
Defence/ national security	96%	-1%	2%
Crime levels	95%	-2%	-1%
Education system	93%	1%	2%
Racial relations/ integration	92%	-3%	-1%
The environment	92%	0%	1%
Public transport	91%	-2%	5%
Moral standards	89%	-1%	0%
Health insurance/ protection	87%	0%	3%
Management of the economy	86%	1%	2%
Care for the Elderly	86%	-5%	2%
Taxes	81%	-2%	3%
Government accountability	81%	0%	2%
CPF/pensions	80%	1%	8%
Civil rights/ liberties/ free speech	78%	-1%	3%
Population management	76%	0%	5%
Jobs and unemployment	74%	1%	0%
Level of salaries and wages	73%	-3%	1%
Housing affordability	72%	0%	4%
Motor vehicle prices/ COE	72%	-1%	5%
Gap between rich and poor	63%	-6%	1%
Cost of living	62%	-1%	5%
Overall GSI	82%	-1%	2%

74 SEP
75 AUG

Community Satisfaction

61 SEP
60 AUG

Personal Finances

59 SEP
58 AUG

National Economy

Singapore's Top 5 News Stories of the Month

% Who Followed the News

% Who Paid Close Attention

1

Minimum qualifying salary to rise by S\$600 for Employment Passes and S\$100 for S Passes



2

Malaysia extends COVID-19 movement curbs till December 31



3

6,000 SIA Group staff take no-pay leave



4

Massive explosion in Beirut, Lebanon's capital, kills at least 150 people



5

First Apple store in the world that sits on water to open at Marina Bay Sands soon



SG Economy: Is Local the New Global?

SG Digitalisation: How Far Along Are We?

SG Society: Will Singapore Singles Leave the Nest Earlier?



SG Economy:

Is Local the New Global?

Much has been said about how COVID-19 has decimated the retail sector in Singapore. According to SingStat, retail sales fell 8.5% year-on-year in July. This reflects an improvement over the previous month, where sales fell by 27.7%. This month, we take a closer look at Singaporeans' shopping behaviours and see if the pandemic has brought about a change in our preferences.

As our recent *Into the Light* report shows, consumers across the ASEAN region are paying more attention to a brand's country of origin, with a marked preference towards local brands. Six in 10 ASEAN consumers state that a product's country of origin is an important factor in their purchasing decision, and 85% state they support local brands over international ones.

This shift is clearly reflected in our Singapore audience: our monthly poll reveals that close to half (48%) of Singaporeans are willing to pay more for a local brand than for a similar product from overseas.

But being local is not enough – for customers to be willing to pay more for the product, the brand also needs to be relatable and authentic (71% say these are important factors). The brand also needs to convey a sense of pride, highlighting our grit, our hard work, and what it means to be a Singaporean (58%). It will also help if the brand has demonstrated clear efforts to help the local community (51%).

The type of product also makes a difference when making purchasing decisions. Singaporeans are more likely to spend more on a local brand if the product is food and beverage (80%) compared to consumer durables (36%) or beauty products (35%).

But Singaporeans still find quality (85%) and price (81%) to be the key driver when adding goods to their baskets. Brand heritage (42%), stature (43%), and local relevance (52%) will only get you so far.

As the COVID-19 situation evolves, Singaporeans are becoming more discerning and conscientious, with heightened awareness of country of origin and a stronger preference towards homegrown innovation.

If you are a regional or international brand, how are you evaluating your brand and its relevance amongst a more locally minded consumer? Do you understand which elements of your brand draw appeal versus those that need to be refined or revisited entirely? What does "local" mean in the context of your business, and would a more localised strategy or brand image help create greater appeal?

If you are a local brand, how can you take advantage of this unique advantage? How can you set yourself apart from other local players and which elements of your brand can you amplify? COVID-19 has acted as a great accelerator and a massive change agent, so what steps are you taking with your brand to keep up?

What makes you more willing to pay for a local brand?

I can relate to the brand and it feels authentic

71%

I feel that more work and craft has gone into the brand

39%

I feel a sense of pride in the brand as it represents our people, grit and efforts

58%

I feel a sense of community as the brand helps local jobs and businesses

51%

Top 3 categories where Singaporeans are more willing to pay more for a local brand

Food & beverage

80%

Fruits, vegetables and herbs

61%

Clothing

59%

Interested to know more about ASEAN consumer trends?
Email me at yashan@blackbox.com.sg to find out more



SG Digitalisation: How Far Along Are We?

COVID-19 has accelerated digitalisation in Singapore, affecting not just the way companies and businesses operate, but also how individual Singaporeans interact in their daily lives. From scanning QR codes at entryways to ordering food and groceries from mobile devices, a number of digital platforms have made it easier to comply with Circuit Breaker measures.

More recently, it has been announced that Singapore will become the first country in the world to use Facial Verification for government benefits.

Our latest YKA poll supports the idea that Singaporeans are embracing technological innovation. It also reveals that the generational digital divide is less pronounced than it is made to be in the media. While Gen Zers actively seek out opportunities to try out new gadgets, Baby Boomers (60 years-old and above) are increasingly comfortable with new technology as long as someone shows them how to use it. However, about one in 10 Singaporeans still appear anxious about using technology. Moving forward, greater support and assistance to increase adoption and usage will be key.

Despite this growing appetite, tech developers still need to do more to shift people's behaviour when launching new, innovative products and services:

• Internet of Things (IoT) devices and sensors in my home

About a third of Singaporeans have IoT devices in their homes, and half of them (50%) are open to acquiring them in the future. With only 13% pushing back, there is clearly a lucrative and untapped market in Singapore for better user-driven innovation in this space.

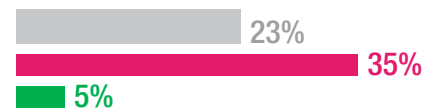
• Using wearables and analytics to change personal behaviour

While 28% of Singaporeans have used wearable technologies, a sizeable majority (51%) are open to it. There is more resistance to this tech though, with one in five (22%) claiming they are not inclined to try it.

• Telemedicine, where patients access healthcare from their homes

COVID-19 may not have driven mass adoption of telemedicine – only 17% of Singaporeans have tried such services so far. However, there is huge interest in it: 47% of Singaporeans are open to trying telemedicine, and 21% are actively considering it.

I actively seek out opportunities to use new technology in many areas of my life



I am comfortable using new technology, but I don't actively seek it out



I understand technology can bring benefits, but I need to be convinced or shown how before I will use it myself



All Singaporeans
Gen Zers
Boomers

Note: SingPass Mobile currently rates as the most popular Government app, coming in at 85% take up. Interested to know which was least installed? Drop me a note at jonathan@blackbox.com.sg to find out more.



SG Society:

Will Singapore Singles Leave the Nest Earlier?

The pandemic has brought about many changes in Singapore, and it may be majorly impacting young adults' ability to leave home. Singaporeans typically live with their parents until they are old enough to get married or to purchase their own apartment. But the recent generalisation of work from home (WFH) measures may be accelerating this process.

Recent news articles suggest that not everyone is enjoying WFH while being stuck with family members. This has pushed younger Singaporeans to seriously consider moving out and renting their own personal space.

This month we asked if it is ok for young adults to move out of their parents' house before getting married (or being financially secure to purchase) and choose to rent a place – nearly three in four (73%) Singaporeans approve of this in principle. Amongst Gen Zers approval is at 88%.

In the context of WFH, approval is even higher amongst Singaporeans, at 79%.

When asked if the Government could do more to encourage younger people to move out and rent their own places, Singaporeans are far less enthusiastic – only 31% support the idea of offering a tax deduction for young adults who choose to leave the nest and rent their own place.

Another option canvassed in our survey was the idea of the Government allocating a certain number of rent-controlled apartments for youths looking to move out. Rent-control apartments are popular in large cities like New York. Nearly half (47%) of Singaporeans approve of this idea.

More generally, the Government's policy of singles having to reach the age of 35 before being allowed to buy a HDB flat is now opposed by just under half (48%) of all Gen Zers.

**Gen Zers are Singaporeans aged under 25 years.
YKA Monthly covers the 15-24 age band.*

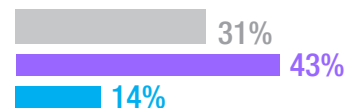
Yes, youths should move out of their parents' home and rent a place before marriage or buying their own house



Yes, youths should rent their own place due to work from home policy



The Government should offer youths tax deductions for leaving the nest and renting a place



All Singaporeans
Gen Zers
Boomers

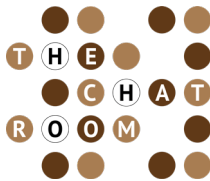


Who We Are

Blackbox Research is a Singapore based data content specialist. We provide research and affiliated data and communications services for business, government and NGO clients across Asia.

You Know Anot

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 comms@blackbox.com.sg for assistance.






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



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