every+one

YouKnowAnot

January 2021

Government Satisfaction Index

83 JAN
85 DEC

80 JAN
82 DEC
Community Satisfaction

67 JAN
68 DEC
Personal Finances

73 JAN
73 DEC
National Economy

Jobs and unemployment, gap between rich and poor and cost of living saw the largest drops at 5 points. Only crime levels and public transport saw gains of 1 point.

	Government Satisfaction	Change since last month	Change over last 12 months
Defence/ national security	98%	0%	0%
Crime levels	96%	1%	-1%
Racial relations/ integration	93%	-1%	1%
Education system	92%	-1%	1%
The environment	93%	-1%	1%
Public transport	93%	1%	5%
Moral standards	90%	0%	5%
Care for the Elderly	90%	-1%	4%
Management of the economy	89%	-2%	4%
Health insurance/ protection	87%	-3%	2%
Government accountability	83%	-3%	3%
Taxes	83%	0%	2%
CPF/pensions	83%	0%	5%
Civil rights/ liberties/ free speech	80%	-2%	3%
Population management	79%	-2%	9%
Jobs and unemployment	76%	-5%	2%
Level of salaries and wages	75%	-2%	3%
Motor vehicle prices/ COE	71%	-3%	1%
Housing affordability	72%	-4%	1%
Gap between rich and poor	67%	-5%	9%
Cost of living	63%	-5%	8%
Overall GSI	83%	-2%	3%

Singapore's Top 5 News Stories of the Month

% Who Followed the News   % Who Paid Close Attention

		% Who Paid Close Attention	% Who Followed the News
1	Singapore enters phase 3 on Dec 28: Groups of 8 to be allowed for social gatherings	50%	95%
2	COVID-19 vaccines free and voluntary for all Singapore residents	49%	94%
3	US Electoral College hands Joe Biden victory in presidential election	36%	90%
4	KL-Singapore HSR project terminated as agreement lapses	33%	90%
5	Royal Caribbean cruise passengers disembark from ship where man tested positive for COVID-19	28%	87%

Life after COVID-19: What will the new normal look like?

Entertainment: The streaming wars have only just begun

Shopping: Reimagining the heartlands in the digital age

Life after COVID-19: What will the new normal look like?

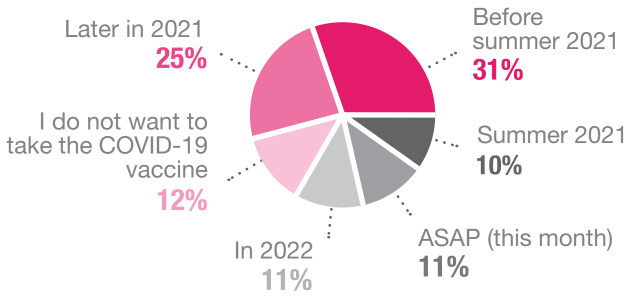
For the most part, Singaporeans have adapted to the constraints of living in a global pandemic. With the COVID-19 vaccines now on the horizon, many are looking forward to post-pandemic life – though they are not willing to let COVID-related measures intrude into every facet of their day-to-day. Where is the line being drawn in terms of what we will put up with in the new normal?

Our data shows that the roll-out of the COVID-19 vaccine will impact Singaporeans' plans in the new normal. For the most part, they have a realistic timeline in mind; not many expect to be vaccinated immediately (31% expect it to happen before Summer 2021) and most know it will come to them later in 2021 (25%). 11% think it will not be until 2022, and a similar proportion (11%) would like to get vaccinated now, in February 2021.

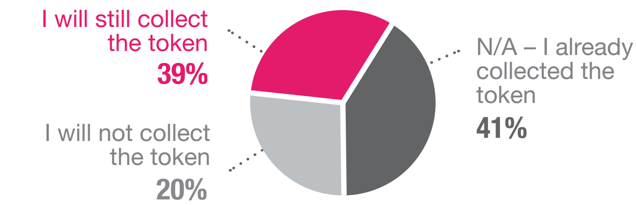
More important than the timing of the vaccination is the type of vaccine that will be made available. Close to 76% of Singaporeans care about which vaccine they will get and which country it comes from, with Millennials (25-34) caring the most (84%) and Boomers (50+) caring the least (63%). In this context, not knowing which vaccine they are lining up for may push people to delay getting vaccinated, which may in turn impact the return to normalcy.

Another major element that will determine the pace of our post-pandemic lives is the adoption of the TraceTogether token. Just half of Singaporeans (50%) are worried about how the government collects, handles, or uses their TraceTogether data following the announcement that TraceTogether data could be used for purposes other than contact-tracing. Yet 39% say they will still collect the token and 44% say they will use it as instructed – suggesting that looking ahead to the future may be more important than fretting over potential privacy issues.

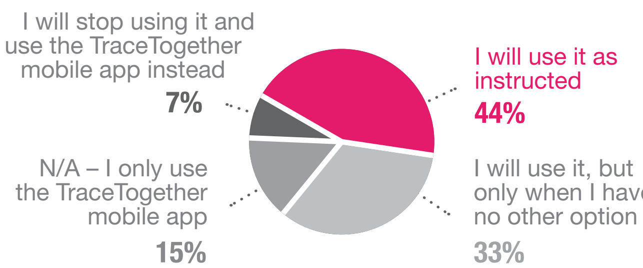
I hope to be able to receive the COVID-19 vaccine in:



Will the announcement that TraceTogether data can be used in criminal investigations affect your collection of the TraceTogether token?



Will the announcement that TraceTogether data can be used in criminal investigations affect your usage of the TraceTogether token?



Entertainment: The streaming wars have only just begun

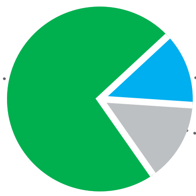
2020 was a great year for video streaming companies. Around the world, most people were forced to stay home with no other option than to binge-watch movies and series. Even after lockdowns ceased, many kept their streaming habits. In Singapore, the imminent arrival of global giant Disney+ will soon be pushing local and regional players out of their comfort zone – to the benefit of consumers.

Our data shows that Netflix is king in Singapore… for now. Many Singaporeans still do not subscribe to a service, representing an untapped opportunity for a new provider who meets their content/pricing needs. At 57%, Netflix dominates the Singapore market, with YouTube TV (23%) and Amazon Prime Video (16%) trailing behind. Some 30% of Singaporeans do not subscribe to any digital streaming service. For those who will consider a new subscription service, Disney+ (22%) leads the way, followed by HBO Max (14%) and Discovery+ (13%).

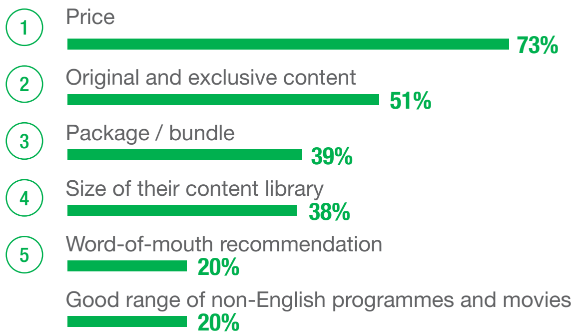
Apart from acquiring market shares, a key challenge for streaming providers will be potential over-saturation of Singapore's small market. Most Singaporeans already think there are too many options available (even at this early stage), and many are not keen to add an extra subscription service to their existing ones. Two in five (39%) do not want to add another streaming service. So platforms are going to have to really differentiate and build in new services and offers over time to win over new customers.

In this context, streaming providers will have to work hard to stand out. What will be a key factor in their success? Price is at the top of the list when it comes to choosing a streaming service – but it is not the only criteria. 73% of Singaporeans put price as the main reason they choose a streaming service over another, but original and exclusive content also comes into play (51%) followed by the fact that it comes bundled with other offers (39%). These findings suggest that future market dominance may lie in providers' ability to bundle unique or niche offerings, such as live sporting events.

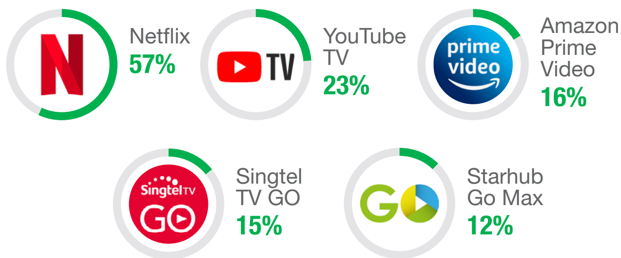
Do you think there are now too many streaming service options available?



What is the top reason for subscribing to a particular streaming service? *(Top 5 answers)*



Which streaming services (video on demand) does your household subscribe to? *(Top 5 answers)*



Shopping: Reimagining the heartlands in the digital age

For several years now, Orchard road has been losing its notoriety as Singapore's main shopping destination. The rise of e-commerce, coupled with the emergence of convenient heartland malls, has pushed Orchard out of shoppers' minds. And the absence of tourists due to the COVID-19 pandemic has only intensified the decline. How can heartland shops seize this opportunity and keep shoppers coming back?

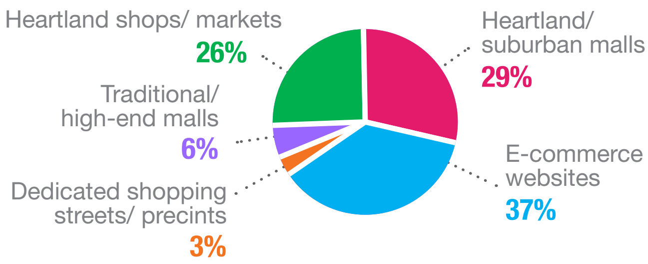
Our data shows that heartland destinations play an important role in Singaporeans' day-to-day purchases. At 37%, e-commerce platforms dominate, but heartland/suburban malls (29%) and heartland shops/markets (26%) are not that far behind. Unsurprisingly, e-commerce usage is highest for Millennials (51%) and lowest for Boomers (14%), while heartland shops/markets stand highest for Boomers (43%) and lowest for Gen Zers (13%).

For heartland spaces to be more attractive to Singaporeans – especially to younger Singaporeans – they need to be reinvigorated/rejuvenated in two concrete manners.

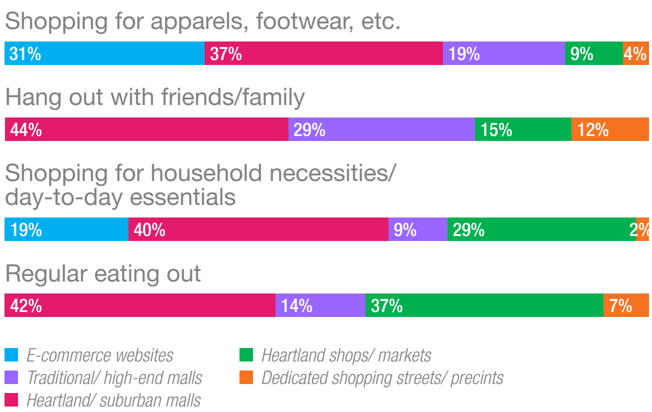
First, by providing options for community members to live, bond, and share – essentially making shopping one of many possible activities instead of the main attraction. Indeed, heartland shops/markets/malls are not used exclusively for shopping. For 44% of Singaporeans, they are used to hang out with friends and family, as well as eating out in groups (42%). Second, by making sure that heartland shops more readily accept digital/contactless payment options. At the moment, cash is still king in heartland shops (43%), which means there is room to diversify the range of accepted modes of payment.

Together, these changes will help heartland establishments create hybrid experiences that will keep Singaporeans interested and engaged.

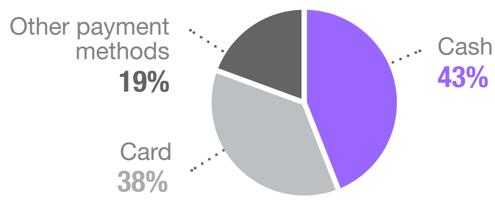
Which shopping channel/avenue can you not live without?



Where do you prefer going for each of these activities?



What is your preferred mode of payment when shopping in heartland shops/markets?



Who We Are

Blackbox provides clients with decision science solutions, offering consumer, business, and community perspectives on contemporary problems and challenges. We monitor emerging trends both regionally and globally with the main aim of signalling potential changes of significance before they occur.

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.

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In addition to YKA, Blackbox now runs a six-country bi-monthly omnibus study across ASEAN: every+one. Through 2021 Blackbox will be providing regular updates on key trends and on the ground sentiment across the increasingly important Southeast Asian region. If you would like to be included in our mailing list for every+one or purchase questions in the omnibus, please reach out. You can contact us at comms@blackbox.com.sg

The Entrepreneur of the year
A ROTARY SINGAPORE-ASME AWARD
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