Consumer Outlook Survey
APAC Region (excluding Japan)

Data collected June 2020 | Adobe PR

Highlights

General Impacts of COVID-19

COVID-19 had an impact on how consumers go about their everyday lives and they view their everyday habits. Just under half of consumers saw a significant impact on their employment, and indicated that personal health, job vulnerability, and the economy are of greatest concern to them. While 95% of consumers re willing to wait out restriction and lockdown measures, only 61% agree with the continued restrictions.

Relationships with Brands

Brand sentiment has remained relatively positive even with COVID-19 affecting how brands interact. Just under one half agree that brands have done enough to prevent price gouging, stock shortages, and delivery availability. Two-thirds of consumers believe brands have been communicating just the right amount at the present time.

Impacts of COVID-19 on Shopping

Shopping has been greatly impacted by COVID-19, with 82% of consumers indicating some difficulties. The most common challenges are out-of-stock, with just over half of consumers mentioning this. Local retail has been given support from consumers with 75% of consumers stating they have done something at this time to help small businesses.

Country Differences

The impact of COVID-19 has affected consumers from various countries and areas much differently. APAC consumers are willing to wait a few months, but not as long as needed, a stark contrast to both Japan and United States consumers. In terms of shopping during COVID, Australian consumers are unique in that they are more likely than other consumers to still prefer in-person shopping. Indian consumers may see the most long term changes – having embraced online shopping, and being strongest in their support of small business.

Methodology

Who participated in this research?

- 4001 total consumers in Australia (1001), China (1000), India (1000) and Singapore (1000) completed the survey online;
- This survey was also conducted in Japan and the US
- To qualify:
  - Aged 18+ years old
  - Own at least one internet connected device

How was this research conducted?

- Participants were recruited from an actively managed online panel -- this should be considered a non-probability sample;
- Participants were incented using rewards points offered by their online panel;
- Research was conducted between June 1st and June 17th, 2020.

Sample Frame

- Quotas were set for gender, and age was monitored.
- No weighting of data was required.
- Margin of error is +/- 1.6 percentage points at the 95% CL
- Additional results can be found at https://portal.advanis.net/adbe/

Advanis is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. This research was sponsored by Adobe and conducted by Advanis. For information about data collection, please contact Lori Reiser (lori_reiser@advanis.net 519.340.0125)

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Icon Source: icons8.com

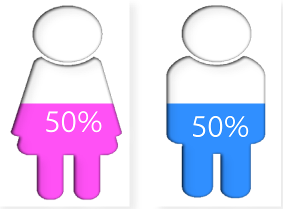
Participant Profile

Participant Profile

Country

China	25%
Singapore	25%
India	25%
Australia	25%

Gender



Children in the home

No children living in the home	54%
Less than 5 years old	13%
5-12 years old	22%
13-17 years old	18%

Income INR

Under 50K	25%
50K-1M	30%
1M-2M	13%
2M-3M	8%
3M-5M	9%
5M-8M	8%
8M+	6%

Income RMB

Under 20K	2%
20k-50k	4%
50k-100k	11%
100k-300k	58%
300k-700k	20%
700k+	4%

Age

18 to 29 years old	23%
30 to 49 years old	36%
50 to 64 years old	26%
65 years+	15%

Marital status

Single	28%
Married/with partner	64%
Divorced/separated	5%
Widowed	2%

Income AUD

Under 10K	5%
10-29,9K	15%
30-49,9K	21%
50-69,9K	17%
70-99,9K	17%
100-249,9K	24%
250K+	2%

Income SGD

Under 1K	9%
1K-2K	8%
2K-4K	16%
4K-7K	23%
7K-10K	21%
10K-20K	20%
20K+	3%

Pre-COVID-19 Employment

71% Worked full- or part-time

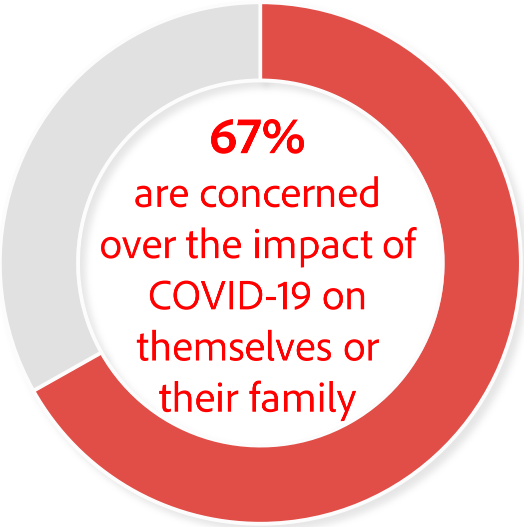
COVID-19 Impact on Employment

Limited/No Impact	59%
Significant impact	45%
I am not currently working	22%
I am now working from home	28%

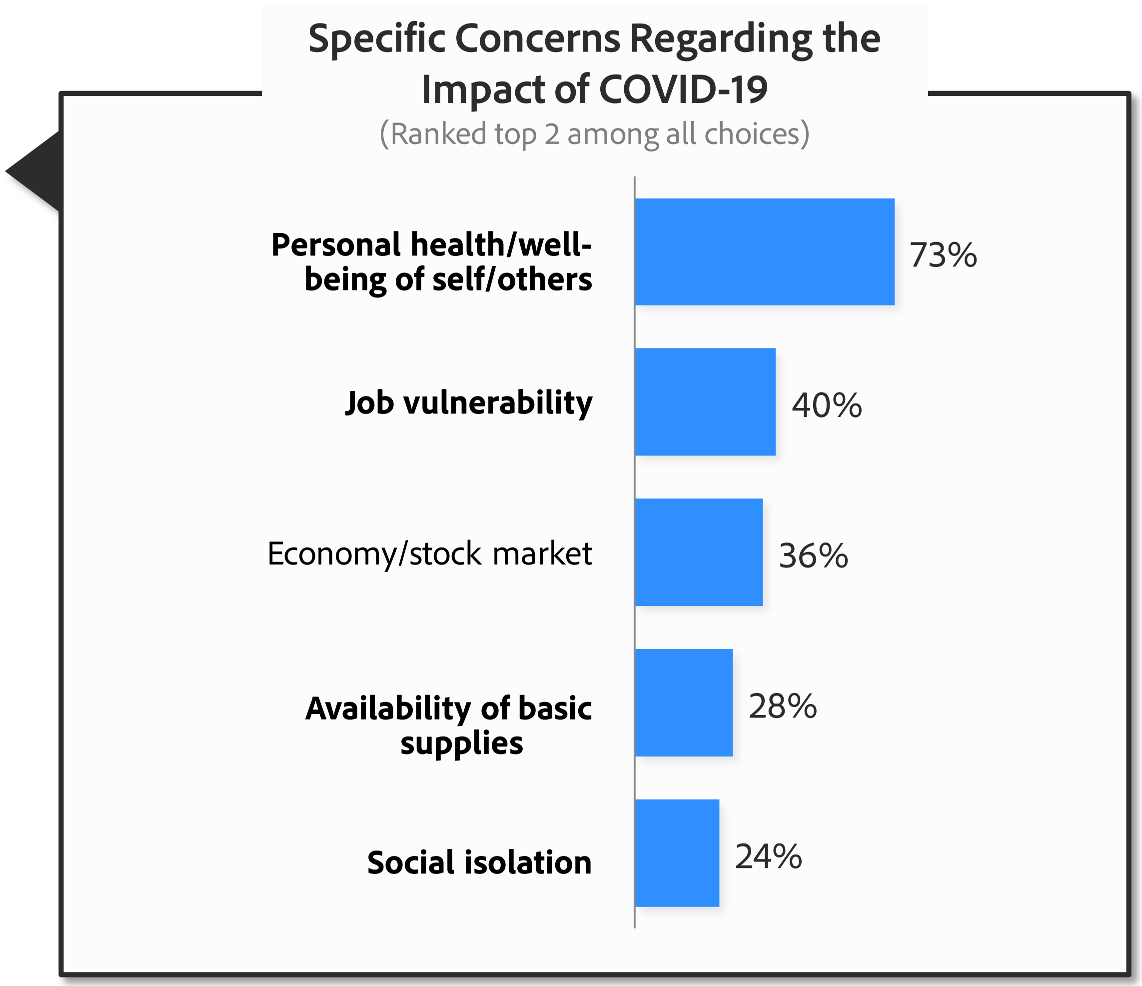
Adobe APAC Consumer Survey Results (June 2020)
S0 – What country do you live in? Base: All respondents (4001)
S1 – What is your gender? Base: (3991)
S2 – In what year were you born? Base: All respondents (4001)
D4 (Marital Status) –Are you…? Base: (3966)
D2 – Do you have children? If so, what ages? Base: (3819)
D5 – Which of these best described your work status before COVID-19 impacted your country? Base: (3957)
D5b – Has your employment been impacted by COVID-19? Base: (3934)
D6AU/CH – What was your total household income before taxes during the past 12 months? Base: AU (906) */ CH (994)*
D6 IN/SP – What is your total monthly household income before taxes? Base: IN (957) / SP (944)

Detailed Findings:
General Impacts of COVID-19

COVID-19 Concerns



- Over two-thirds (67%) of consumers expressed concern for the overall impact of COVID-19, where **health/well-being** (73%), **job vulnerability** (40%), and the **economy** (36%) were ranked as the most concerning.
  - **Millennials** (72%) typically expressed greater concern over COVID-19, while the opposite is true for **Gen Z** (58%), **Boomers** (62%), and **Traditionalists** (48%).



Adobe APAC Consumer Survey Results (June 2020)
Q1 – How concerned are you personally about the impact of COVID-19 on yourself and your family? Base: All respondents (4001)
Q2 – Please rank your concerns about impact of COVID-19, where 1 = your biggest concern. Base: All respondents (4001)

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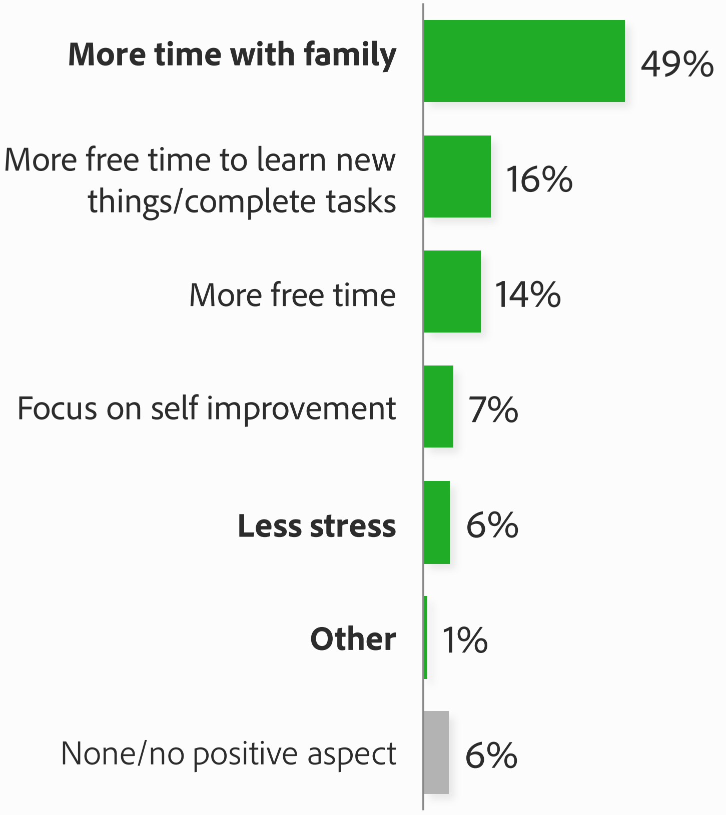
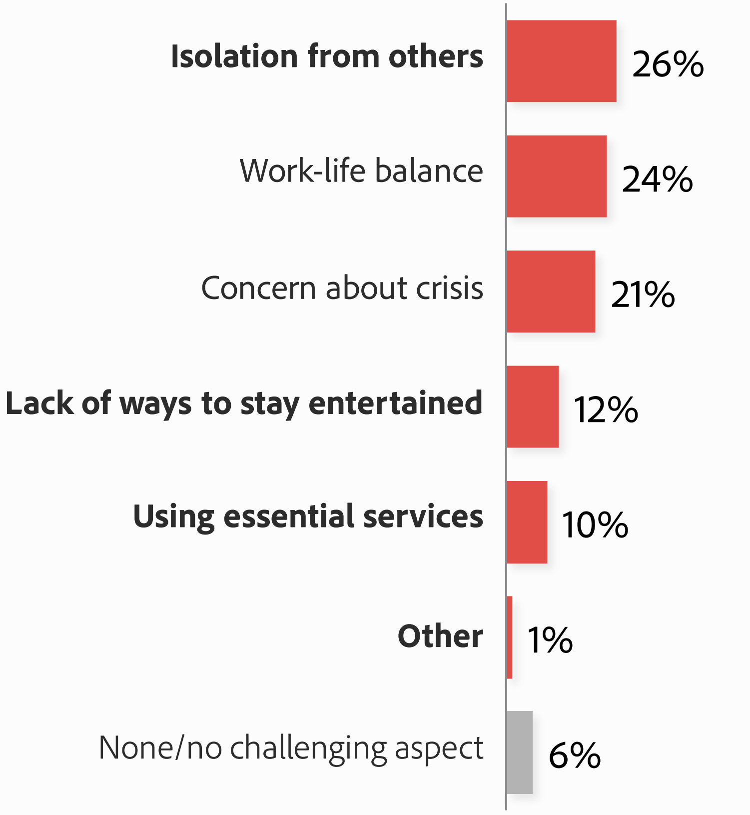
Aspects of at Home Life

Positive Aspects of being at home



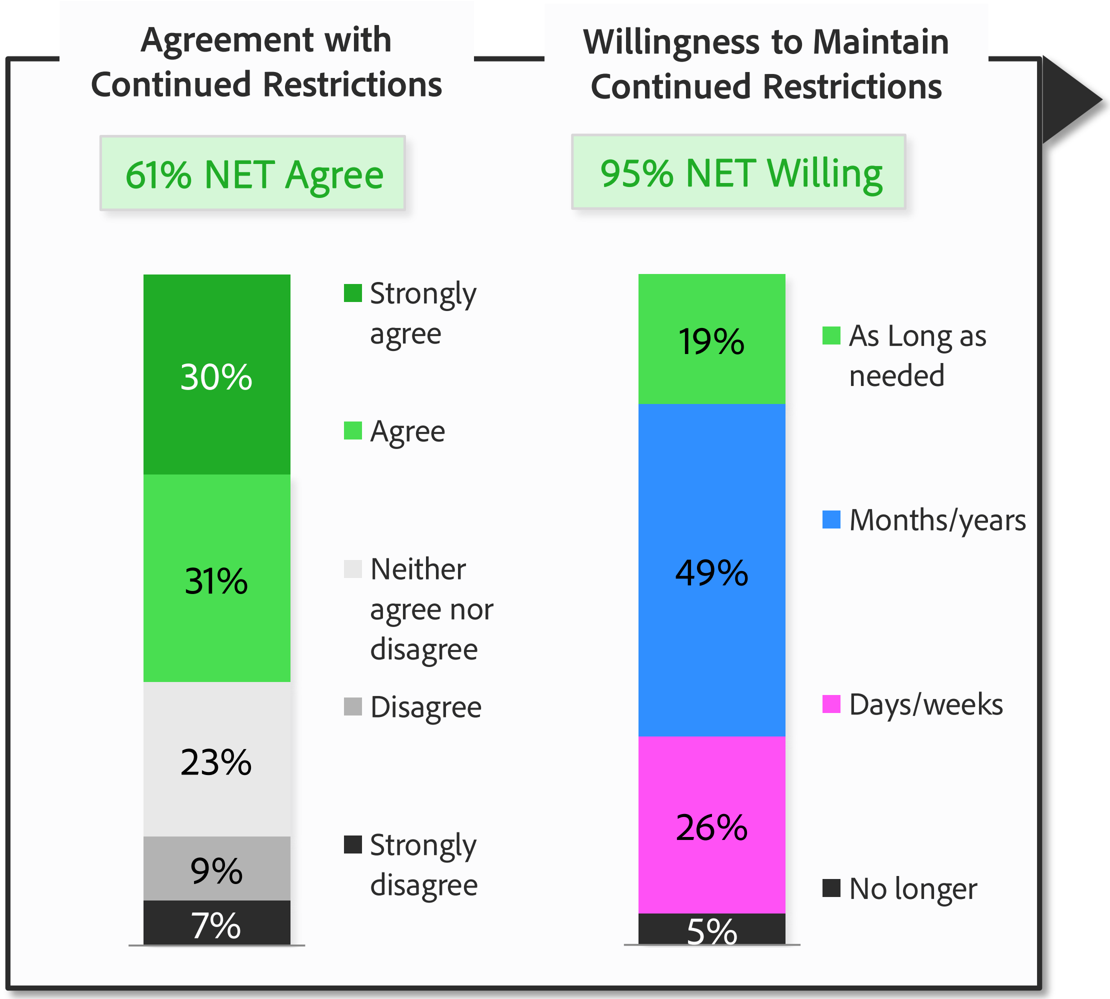
- Nearly all (94%) of consumers cited at least one positive aspect of being at home, with **family time** (49%) being reported most frequently.
  - **Urban residents** were more likely to report *family time.*
  - **Millennials** reported *family time* more often (54%) while **Baby Boomers** focused on *free time* (20%) more than other ages.
- Similarly, 94% of consumers cited at least one negative aspect.
  - **Gen Z** and **Millennials** reported *work-life balance* and *lack of entertainment* more often, while **Baby Boomers** were pre-occupied with *essential services* and *isolation*.

Challenging Aspects of being at home



Adobe APAC Consumer Survey Results (June 2020)
Q2b – What is the most positive aspect of being home during this crisis? Base: All respondents (4001)
Q2c – What is the most challenging aspect of being home during this crisis? Base: All respondents (4001)

Perceptions Regarding Continued Restrictions

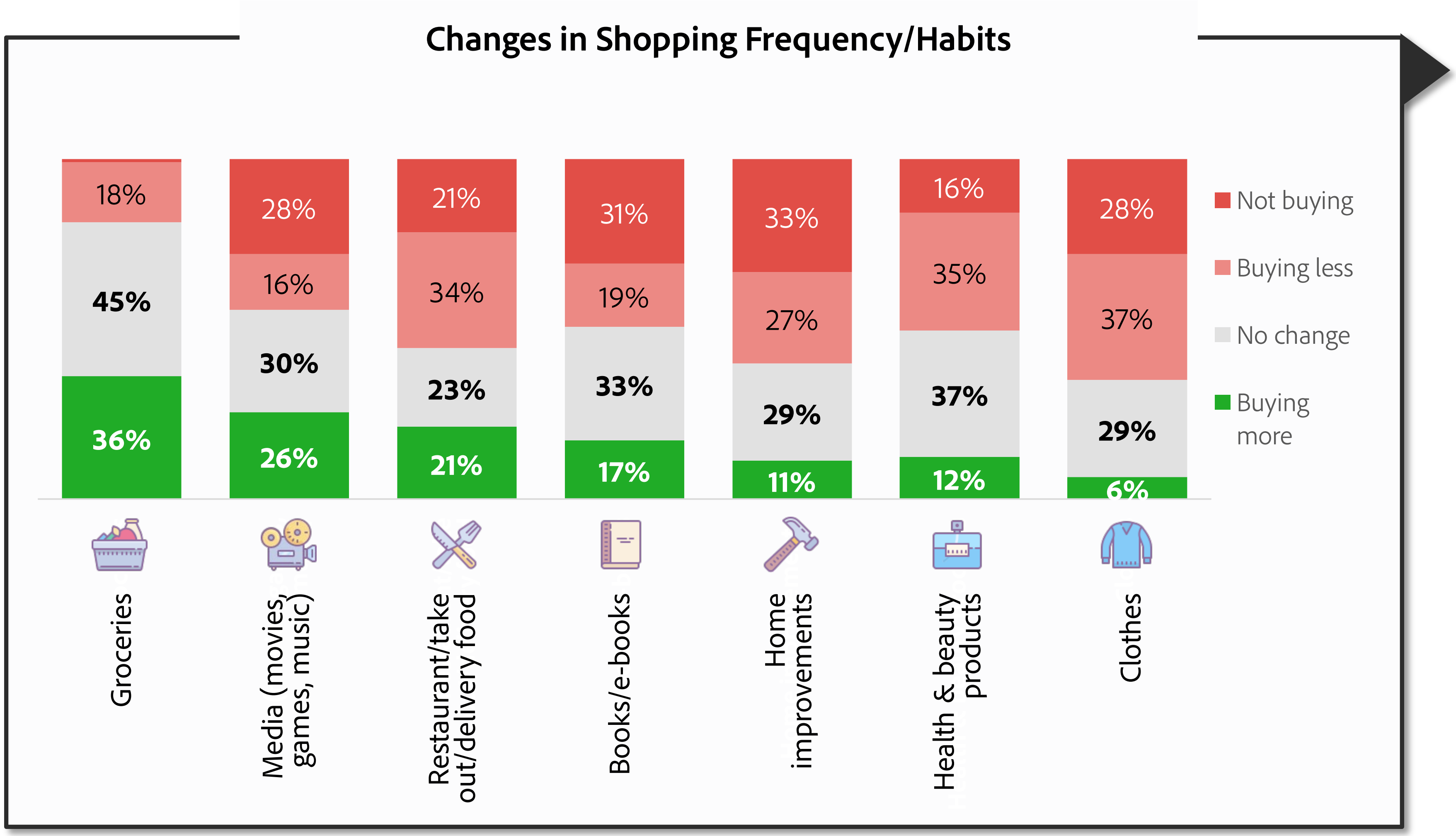


- Over 3-in-5 (61%) consumers agreed with continued restrictions in light of COVID-19.
  - **Baby Boomers** and **Gen Z** were more likely to disagree with restrictions (20%), **urban residents** voicing agreement (64%).
  - **Chinese** consumers cited the least disagreement to continued restrictions.
- Nearly all (95%) of consumers were willing to maintain restrictions.
  - **Younger generations** and **urban residents** were more likely to only tolerate a few more *days/weeks*, contrasted by **older generations** and **rural residents** willing to wait for longer durations.
  - **APAC consumers** are amongst the least likely to cite they can *wait no longer*, a stark contrast from **Japan** and the **USA**.

Adobe APAC Consumer Survey Results (June 2020)
Q2d – Do you agree with continued restrictions/extended lockdown (except for essential workers? Base: All respondents (4001)
Q2e – How much longer are you willing to comply with the restrictions/lockdown? Base: All respondents (4001)

Detailed Findings:
Impacts of COVID-19 on Shopping

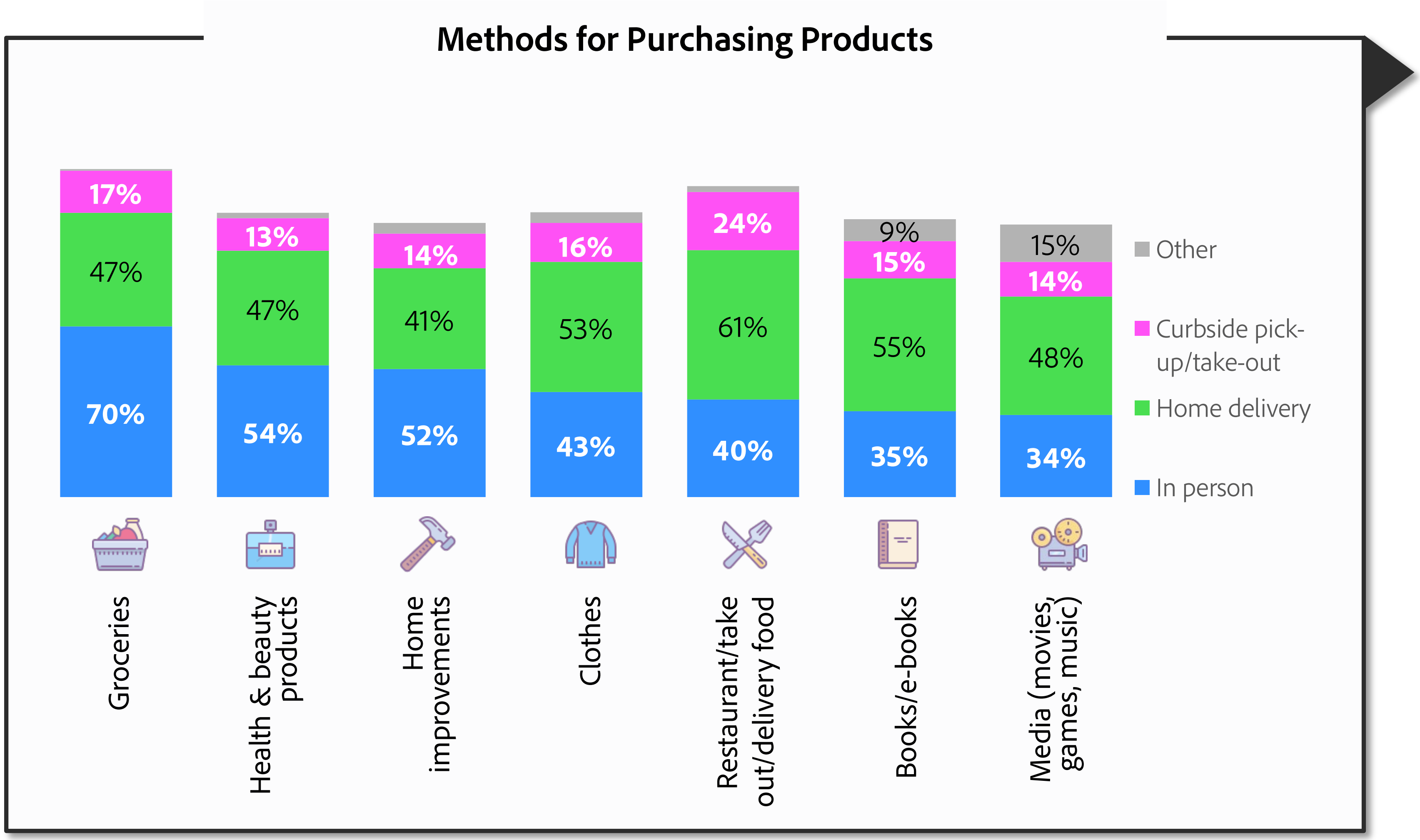
Impact on Shopping by Category



- **Groceries**, **media**, **books**, and **health products** saw an increase or no change in purchase frequency; in contrast, **clothes**, **home improvements**, and **dining/delivery** faced the steepest decline.
  - **Male** consumers were more likely to purchase *dining/delivery* and *media*, while **female** consumers expressed decline in all categories except *groceries* and *clothes*.
  - **Younger generations** and **Indian** consumers, specifically, cited increased purchasing across all categories, with the exception of *dining/delivery* for the latter.

Adobe APAC Consumer Survey Results (June 2020)
Q3 – How, if at all, have you changed your shopping for the following? Base: All respondents (4001)

Mediums for Shopping by Category



- Even when faced with the threat of COVID-19, a majority of consumers opted to purchase *groceries*, *health/beauty products*, and *home improvements* **in-person**, relying on **home delivery** for expected products such as *food* and *books*.
  - Across all product categories, **younger generations** and **urban residents** preferred home delivery while **older generations** preferred in-person shopping, with the exception of *media* for the latter.
  - Amongst all countries surveyed, **Australian** consumers were more likely to favor in-person shopping across all product categories.

Adobe APAC Consumer Survey Results (June 2020)

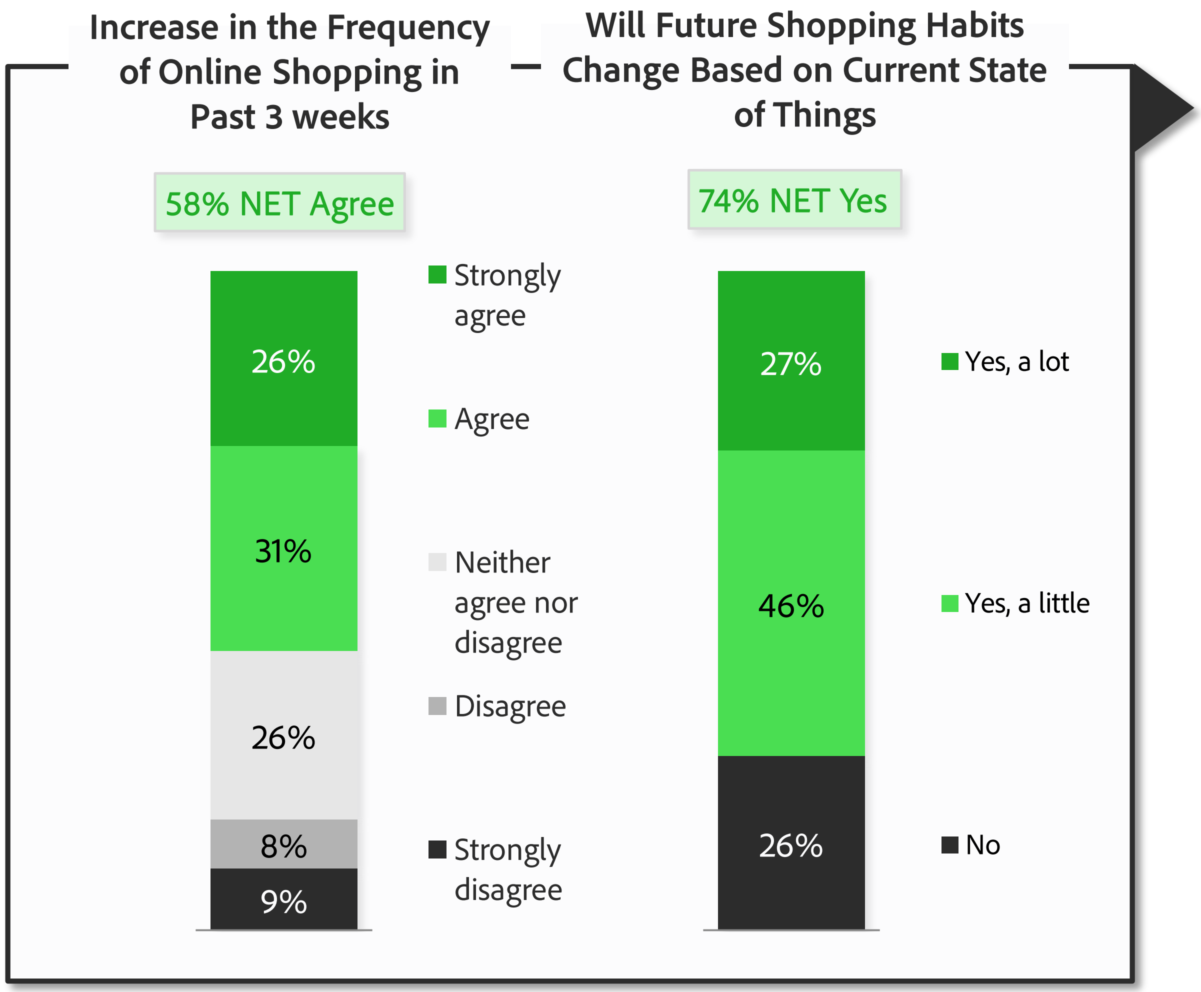
Q4 – How are you purchasing these products? Base: Groceries (3965) Health & Beauty (3383) Home Improvement (2679) Food (3148) Clothes (2899) Books (2772) Media (2886)

Difficulties and Changes in Shopping

- Over half (52%) of consumers most often reported **stock depletion** as a difficulty when shopping, with a similar proportion (43%) reporting **higher prices**. Overall, 82% of consumers reported facing at least one shopping-related issue.
  - **Younger generations** were more likely to report facing *some difficulty when shopping*, while only **urban residents** cited specific issues such as *stock depletion*, *reduced hours*, and *delivery times*.
  - **Female** consumers frequently cited *stock depletion* and *higher prices* while **male** consumers bemoaned *reduced hours*.
  - When compared to **Japan** and the **USA**, APAC countries were less likely to report *stock depletion*. Amongst APAC countries, **Indian** and **Singaporean** consumers were more likely to report *some difficulty when shopping*.

Adobe APAC Consumer Survey Results (June 2020)
Q5 – Have you experienced any difficulty in shopping for essentials? Base: All respondents (4001)

Changes in Present Shopping/Future Intentions



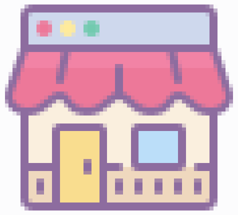
- Nearly 3-in-5 (58%) consumers increased their **online shopping** presence, while 74% cited some future change in their shopping-related habits as a whole.
  - Generations were polarised in their online shopping presence and intentions to change future shopping habits. **Younger generations** were more likely to cite an intention to change future shopping habits, while **older generations** were more likely to cite no increase and no change.
  - **Chinese** and **Indian** consumers were most likely to report an increase to online shopping, with **Indian** and **Singaporean** consumers reporting the strongest intention to change future shopping habits.

Adobe Japan Consumer Survey Results (June 2020)
Q10 – Will the current state of things change the way you shop in the future? Base: All respondents (3539)
Q24 – Have you found yourself purchasing more online in the past 3 weeks? Base: All respondents (4001)

Shopping Experience by Business Type

Perceptions of Best Current Shopping Experience
(% Selected)

SMALL BUSINESSES
30%



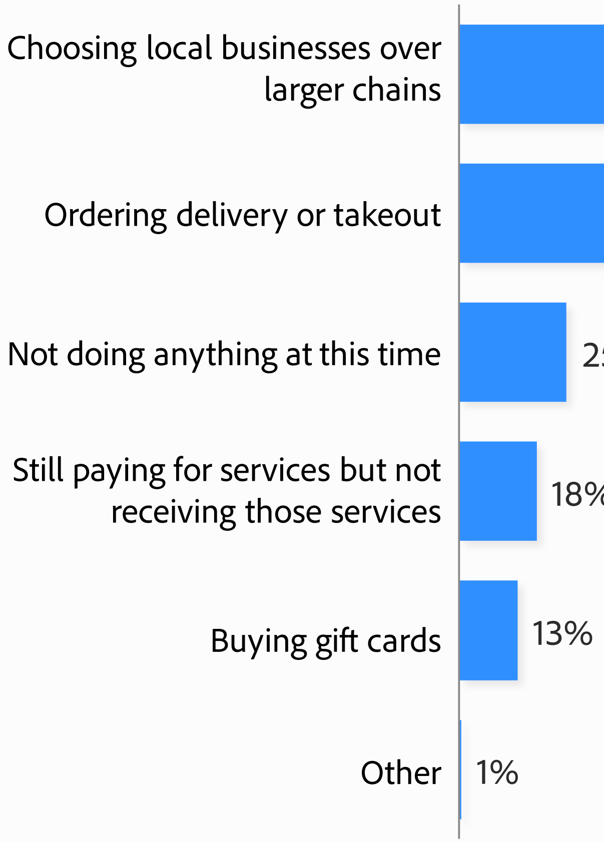
ONLINE RETAILERS
30%

NATIONAL/REGIONAL RETAILERS
23%

NO PREFERENCE
17%

- 3-in-5 (60%) of consumers preferred **small businesses** and **online retailers** over **national retailers**, with 75% supporting small businesses in **some capacity**.
  - **Parents** were more likely to support small businesses.
  - Amongst all countries surveyed, **Indian** and **Chinese** consumers were the most likely to support small businesses (88%, 80%).

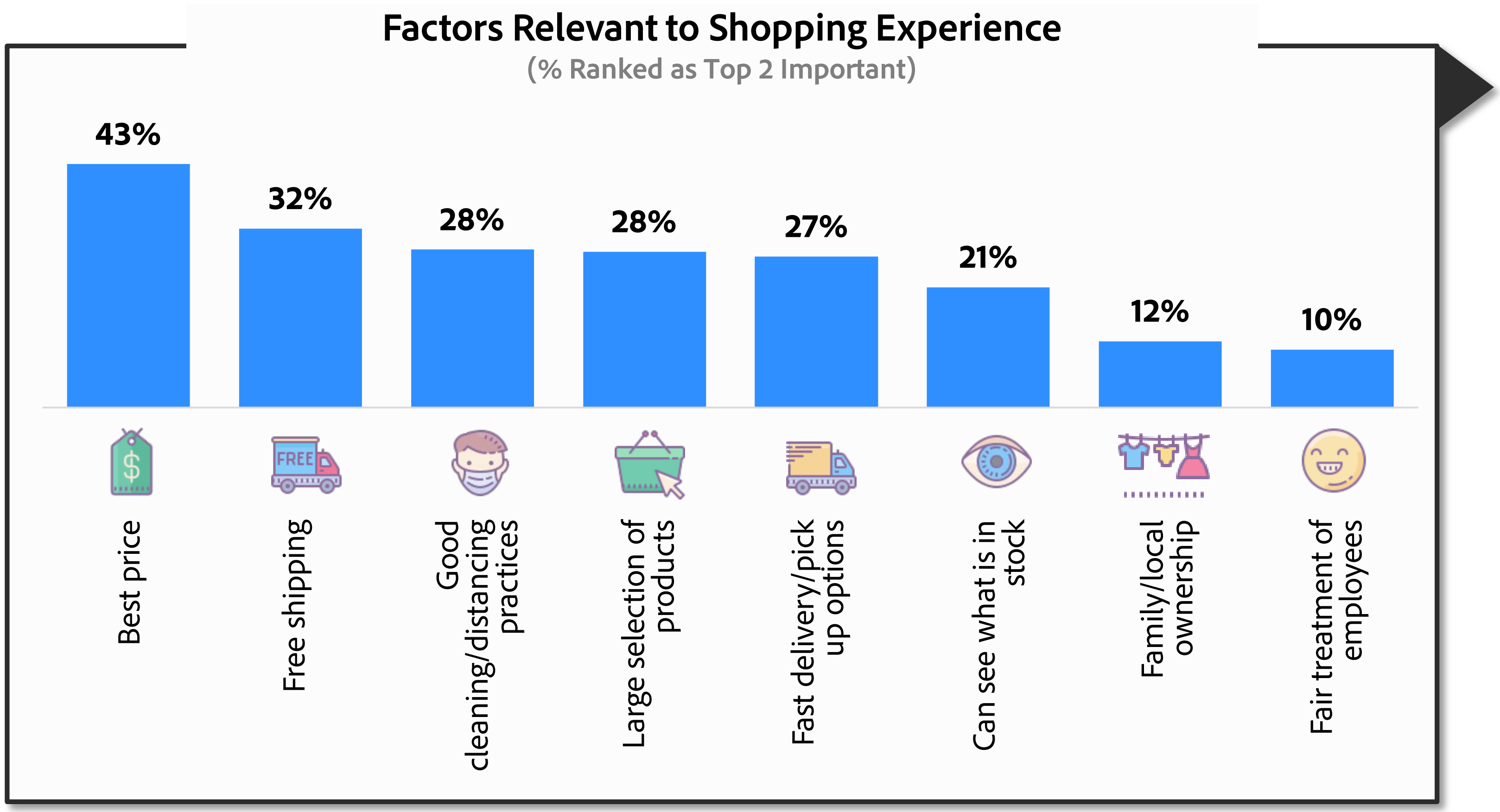
Methods for Supporting Local/Small Businesses
(% Selected)



75% reported supporting local/small businesses in some capacity

Adobe APAC Consumer Survey Results (June 2020)
Q6 – What, if anything, are you doing to support local or independent businesses? Base: All respondents (4001)
Q7 – Who do you think has the best shopping experience for you right now? Base: All respondents (4001)

Important Factors for Shopping

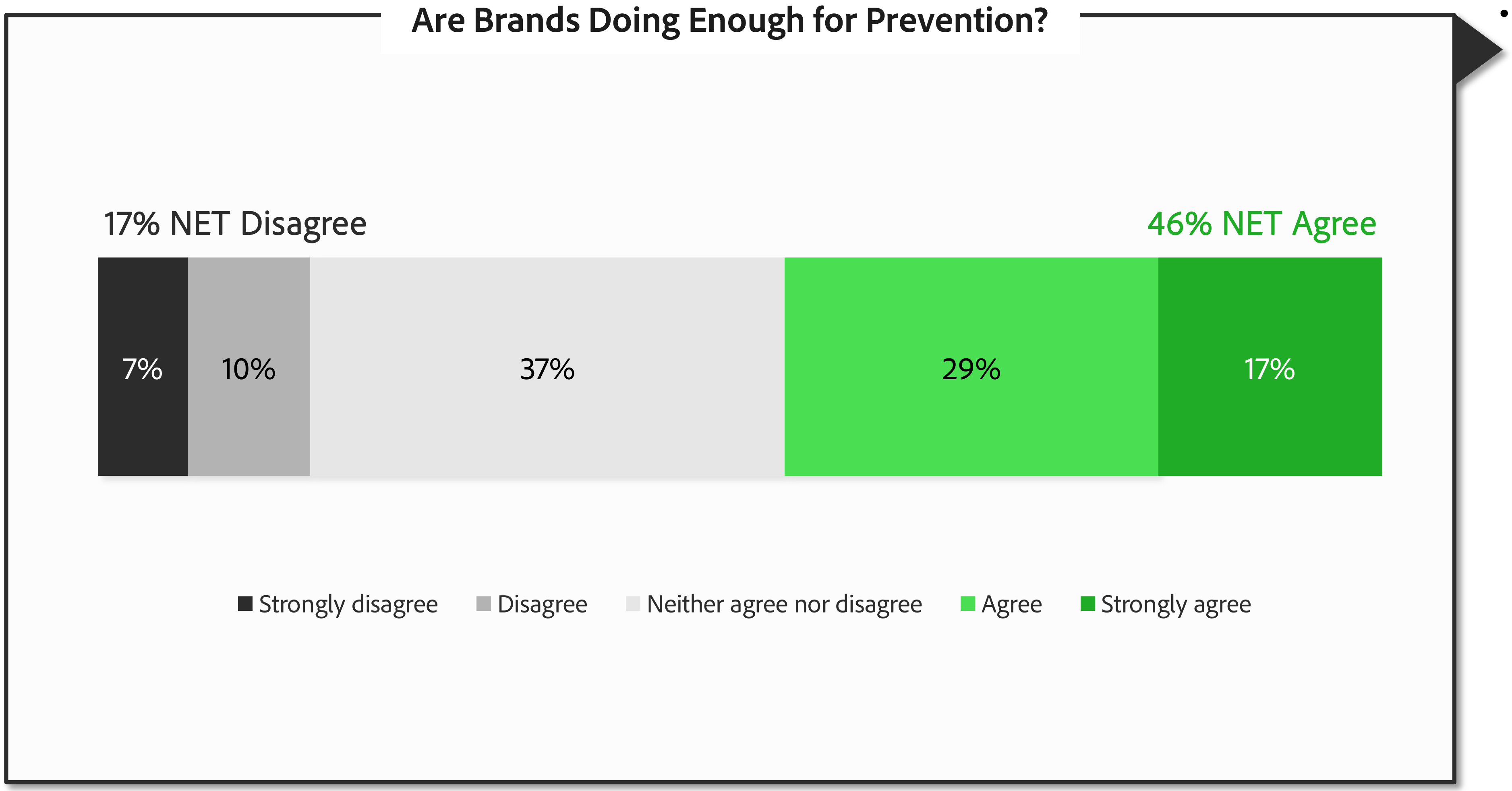


- Overall, *best price*, *free shipping*, *selection*, and *good cleaning practices* were ranked as one of the **top 2 factors important to shopping experience** by at least 1-in-4 people.
  - **Male** consumers were more likely to indicate *fast delivery/pickup* and *product selection* as factors most relevant to their shopping experience, while **females** cited *free shipping* and *seeing stock*.
  - **Younger generations** placed the more importance on *free shipping* and *fast delivery/pickup*, while **older generations** placed importance on *best price*, *product selection* and *seeing stock*. In other words, **younger generations** prioritised convenience while **older generations** favored value and selection.
  - **Singapore** are less likely to value *family/local ownership*, while **Indian** consumers are much more likely to value *good cleaning practices*.

Adobe APAC Consumer Survey Results (June 2020)
Q8 – What is most important to you right now, where 1 = the most important? Base: All respondents (4001)

Detailed Findings:
Relationships with Brands

Are Brands Behaving Ethically?

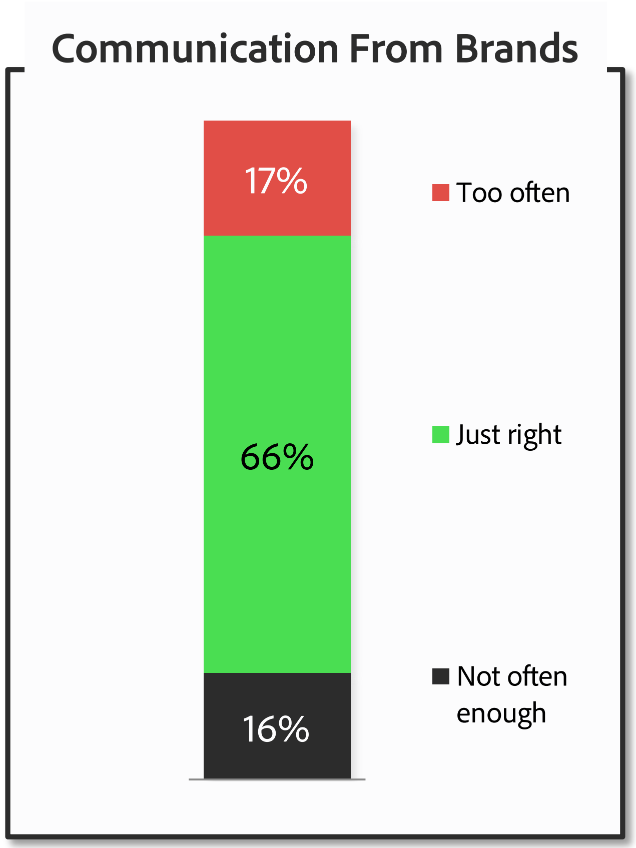


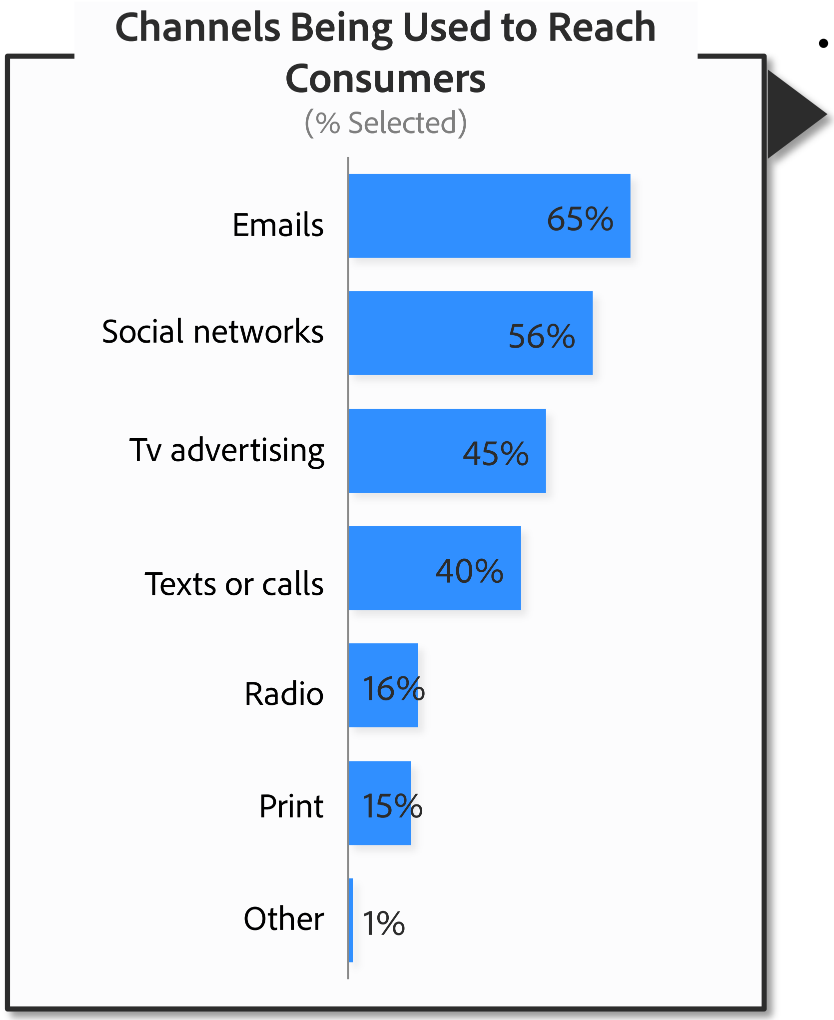
- Nearly half (46%) of consumers <u>agree</u> that brands are doing enough to target *price gouging*, *stock shortages*, and *delivery availability*.
  - **Millennials** and **urban residents** are more likely to <u>agree</u> that brands did enough to prevent bad practices.
  - **Chinese** (72%) and **Indian** (54%) consumers <u>agree</u> brands did enough, contrasted by <u>disagreement</u> from **Australian** consumers. **Singaporean** consumers who have a <u>neutral</u> opinion.

Adobe APAC Consumer Survey Results (June 2020)

Q9 – Do you agree that brands have done enough to prevent price gouging, stock shortages, and delivery availability? Base: All respondents (4001)

Communications From Brands





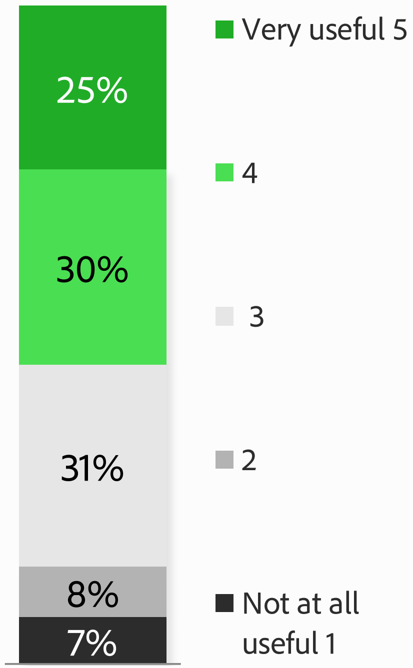
- Two-thirds of consumers agree brands are communicating **just right**, where *email*, *social networks*, *tv adverts*, and *texts/calls* are the most common communication mediums. Interestingly, nearly 1-in-5 (16%) agree brands are **not communicating enough**.
  - **Younger generations** are more likely to unsubscribe from receiving emails.

Adobe APAC Consumer Survey Results (June 2020)
Q11 – In general, have brands been communicating… Base: All respondents (4001)
Q12 – What channels are brands using to reach you with that information? Base: All respondents (4001)
Q13 – In the past few weeks, have you unsubscribed from any email messages that you have received? Base: All respondents (4001)

Content of Communications

Perceived Utility of COVID-19 Related Brand Updates

55% NET Useful

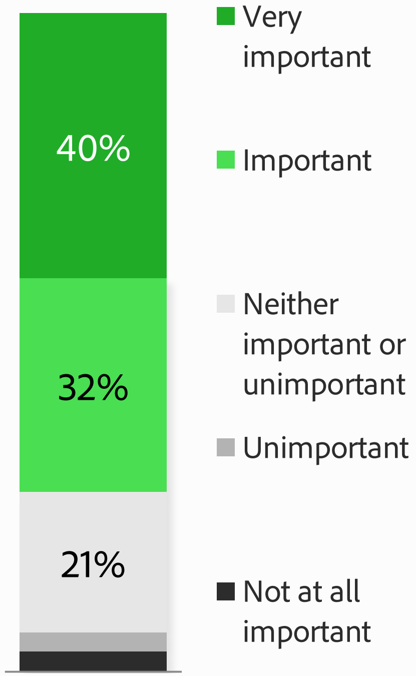


- Over half (55%) of consumers found **utility in brand-related COVID-19 updates**, with 69% requesting said updates in the near future.
  - **Chinese** (67%) and **Indian** (73%) consumers are <u>more likely</u> to find updates useful.

- Correspondence between **visuals/text** found in marketing materials and the **state of the world**, in response to COVID-19, are rated as <u>important</u> by nearly 3-in-4 consumers (73%).
  - **Chinese** (80%) and **Indian** (83%) consumers are <u>more likely</u>.

Importance of Marketing and Ads Corresponding to Current State of World

73% NET Important



Adobe APAC Consumer Survey Results (June 2020)

Q15 – Do you find that it is useful to receive updates from brands about their reactions/plans related to COVID-19? Base: All respondents (4001)

Q16 – Do you want brands to continue updating you on their COVID-19 plans? Base: All respondents (4001)

Q23 – How important is it that marketing and advertising visuals + text corresponds to the current state of the world? Base: All respondents (4001)

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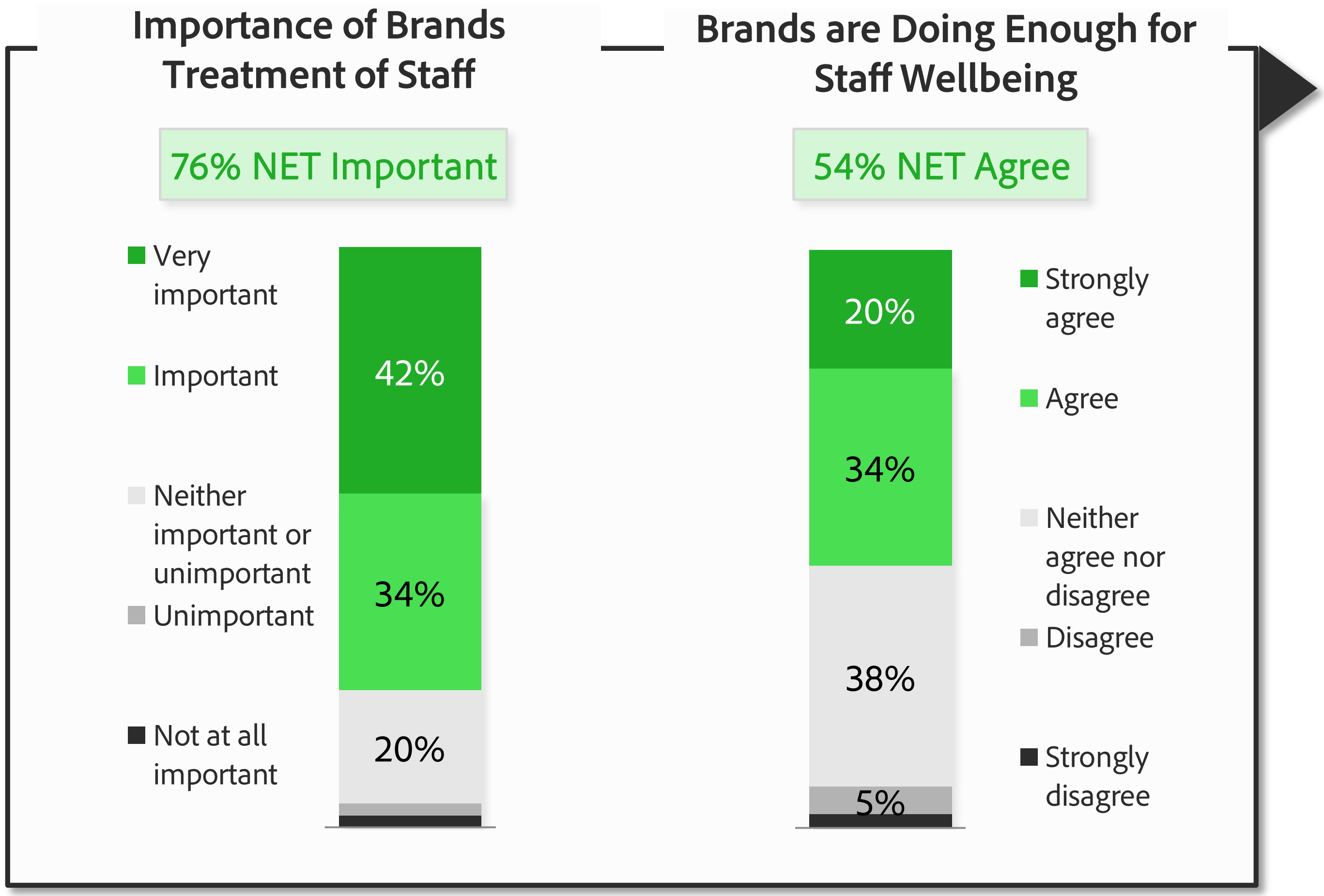
Treatment of Staff



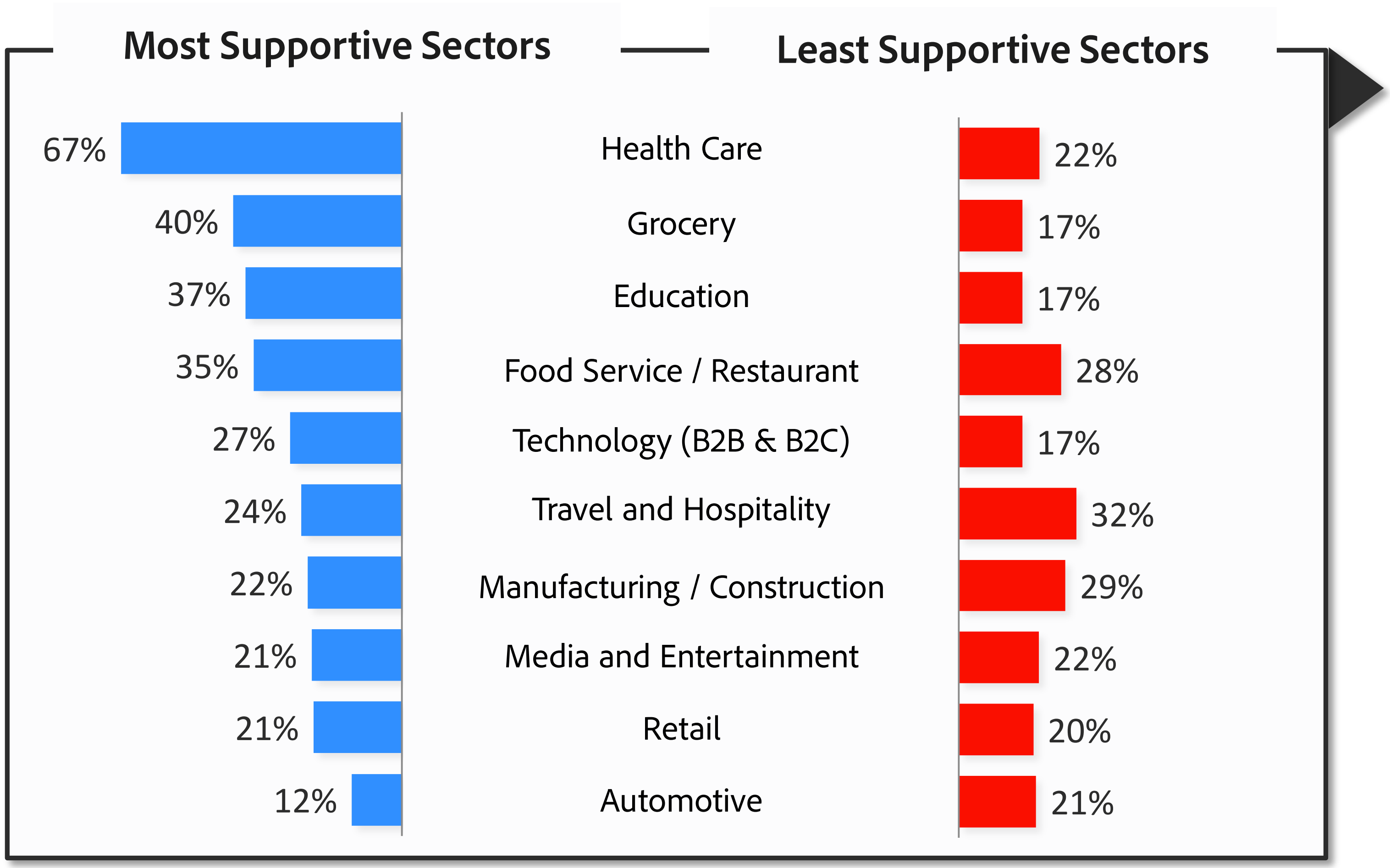
- Just over 3-in-4 (76%) consumers placed importance on **staff treatment**, yet only 54% agree brands are doing enough to ensure **staff wellbeing**.
  - **Younger generations** are polarised when ascribing importance and agreement. **Gen Z** cite less importance and **Millennials** more importance to treatment of staff. **Female** consumers typically place more importance on staff treatment.
  - Overall, only **Chinese** and **Indian** consumers are more likely to place importance on staff wellbeing and agree brands were ensuring said wellbeing, amongst all countries surveyed.

Adobe APAC Consumer Survey Results (June 2020)

Q19 – Do you agree or disagree that brands are doing enough to ensure the wellbeing of staff? Base: All respondents (4001)

Q22 – When thinking of engaging with brands in the future, how important is it to you that brands treat their staff well during this time? Base: All respondents (4001)

Staff Wellbeing by Business Sector



- Just over two-thirds (67%) of consumers agree that the **health care** sector is supportive of its employees, while around 3-in-10 consumers cite the **travel/hospitality**, **food/restaurant**, and **manufacturing** sectors as unsupportive.
  - **Younger generations** cite the *food/restaurant* and *technology* sectors amongst the most supportive but *education* as less supportive, while **older generations** cite the *grocery* and *retail* sectors as most supportive.
  - **Urban residents** are more likely to select the *education* and *technology* sectors as more supportive, and *travel/hospitality* as less supportive. **Rural residents** are more likely to say the *health care* and *grocery* sectors are being more supportive, and *food/restaurant* less supportive.

Adobe APAC Consumer Survey Results (June 2020)
Q20 – Which business sectors in your country are being **most** supportive of their staff's wellbeing? Base: All respondents (4001)
Q21 – Which business sectors in your country are being **least** supportive of their staff's wellbeing? Base: All respondents (4001)

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