



HIGHLIGHT

Learnings from the Lockdown



2020 may very well be the longest year any of us have ever experienced. Filipinos of all walks of life were faced with new adversities, many of which remain unresolved as we approach 2021's halfway point. Nevertheless, changes brought about by the Covid-19 pandemic also brought about new forms of creativity, accountability, and connectivity, with many Filipinos embracing the new aspects of our circumstances.

The road to recovery will be the work of many hands with diverse contributions. While scientists work on medical solutions to contain the spread, each of us have the responsibility to likewise address the challenges in our respective industries for our stakeholders. In order to create these solutions, a better understanding of how drastically society has been changed is critical. How do Filipinos feel about the 2020-2021 rollercoaster year? The answers will provide indicators that will be useful as a springboard in crafting both national and organizational directions.



The Management Association of the Philippines (MAP) through its **Committee on Health** undertook an effort to take the 'sentiment temperature' of the Filipinos across the country on how the lockdowns have benefited or challenged their lives. Tapping the EON Group and its research partner Tangere, a survey among randomly selected respondents was conducted to have a take on what new systems enhanced their lifestyles and what actions made it more difficult for them to cope.

A summary of the findings of this survey are shared in this issue, for both the public and private sector leaders to consider as they plan to forge a better future for the country.



The Quick Pulse Study

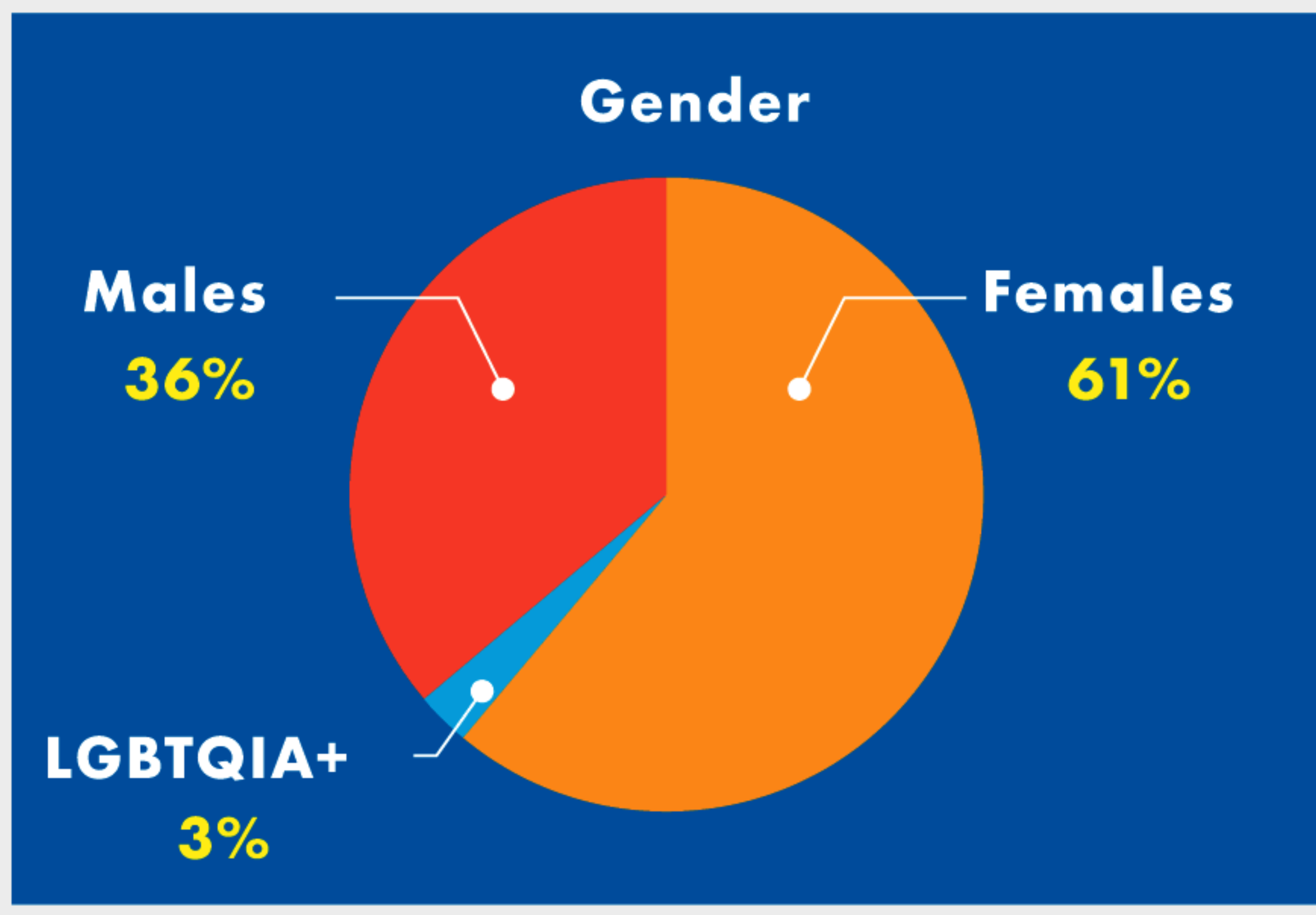
Methodology & Limitations

A total of 6,000 Filipino respondents were surveyed on their sentiments about the changes that have occurred over the year due to the spread of the Covid-19 virus.

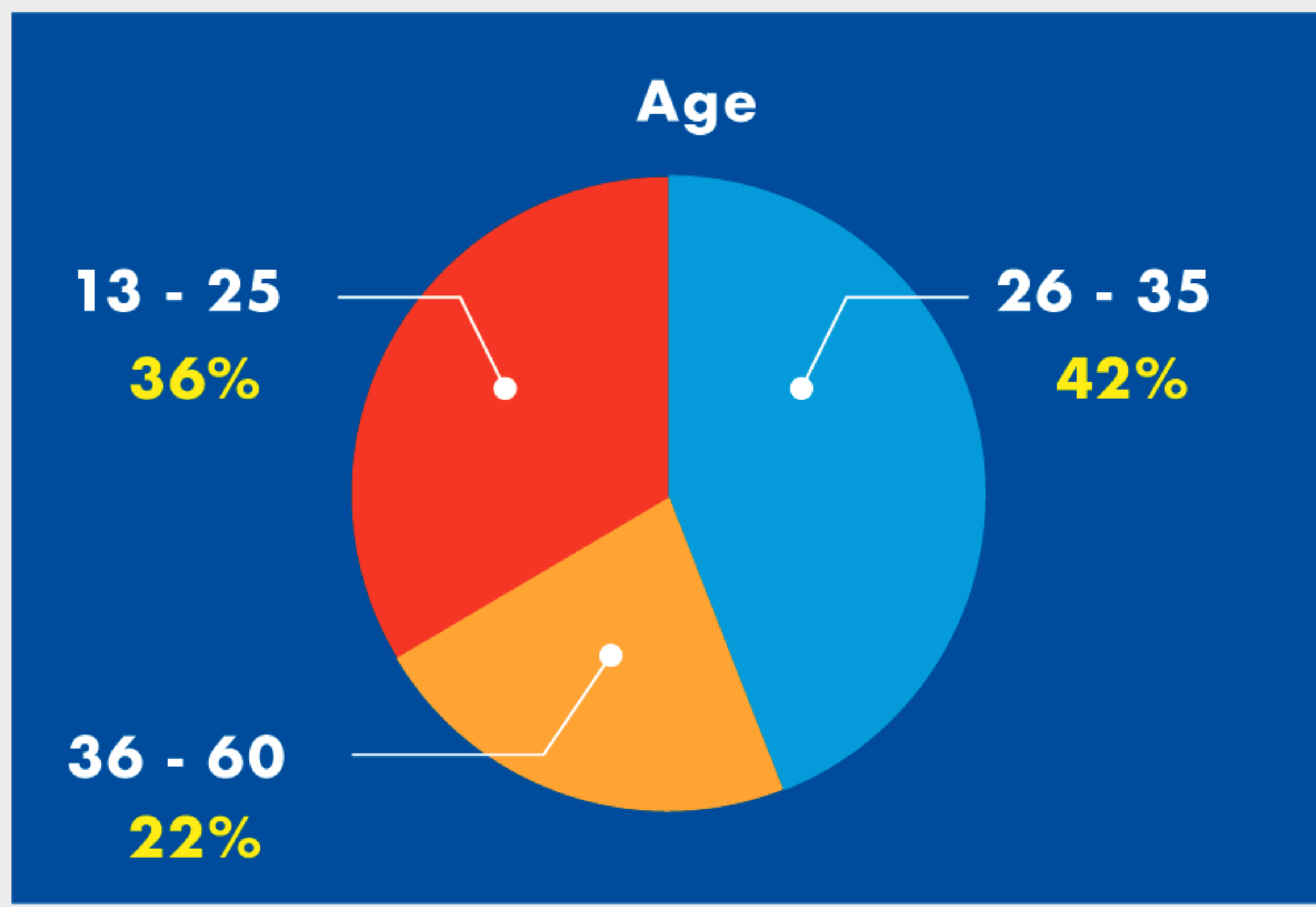
The survey was conducted through the Tangere mobile application and went live from March 16-19, 2021. The 6,000 Filipinos who completely answered are app users from all over the Philippines. Because it is an online survey, respondents were restricted to those with smart phones and internet connections.

Respondents Profile

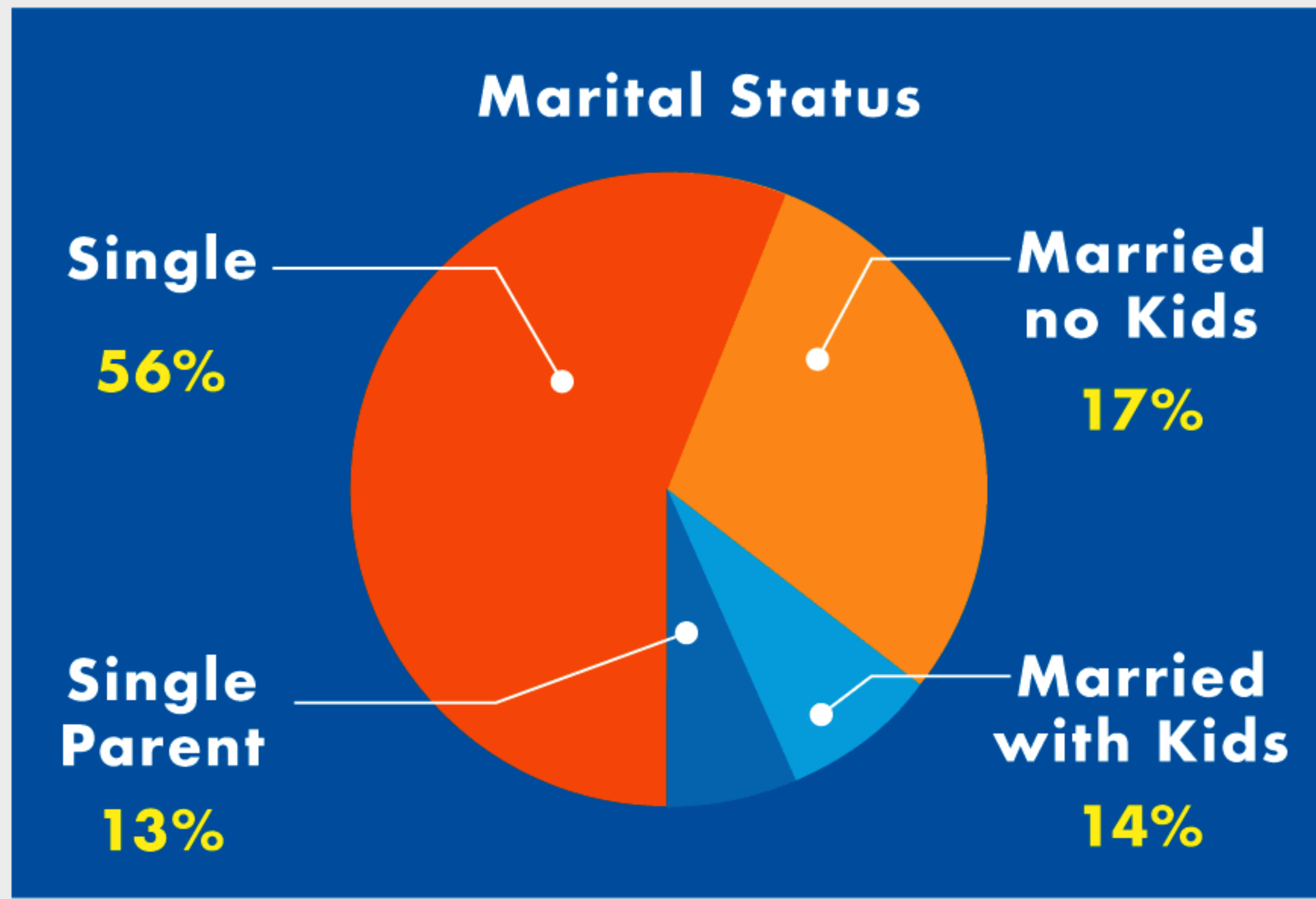
Respondents by Gender



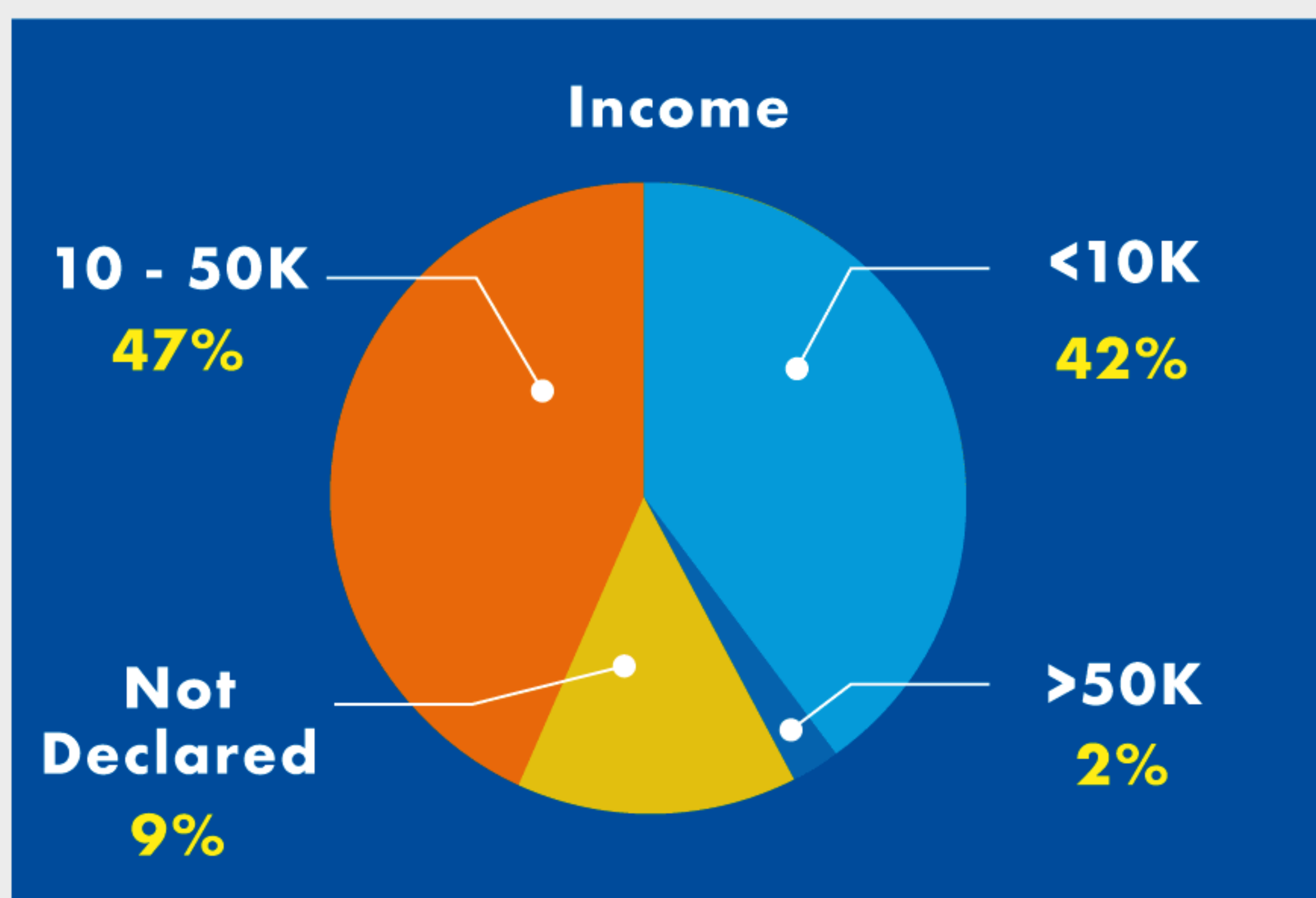
Respondents by Age Group



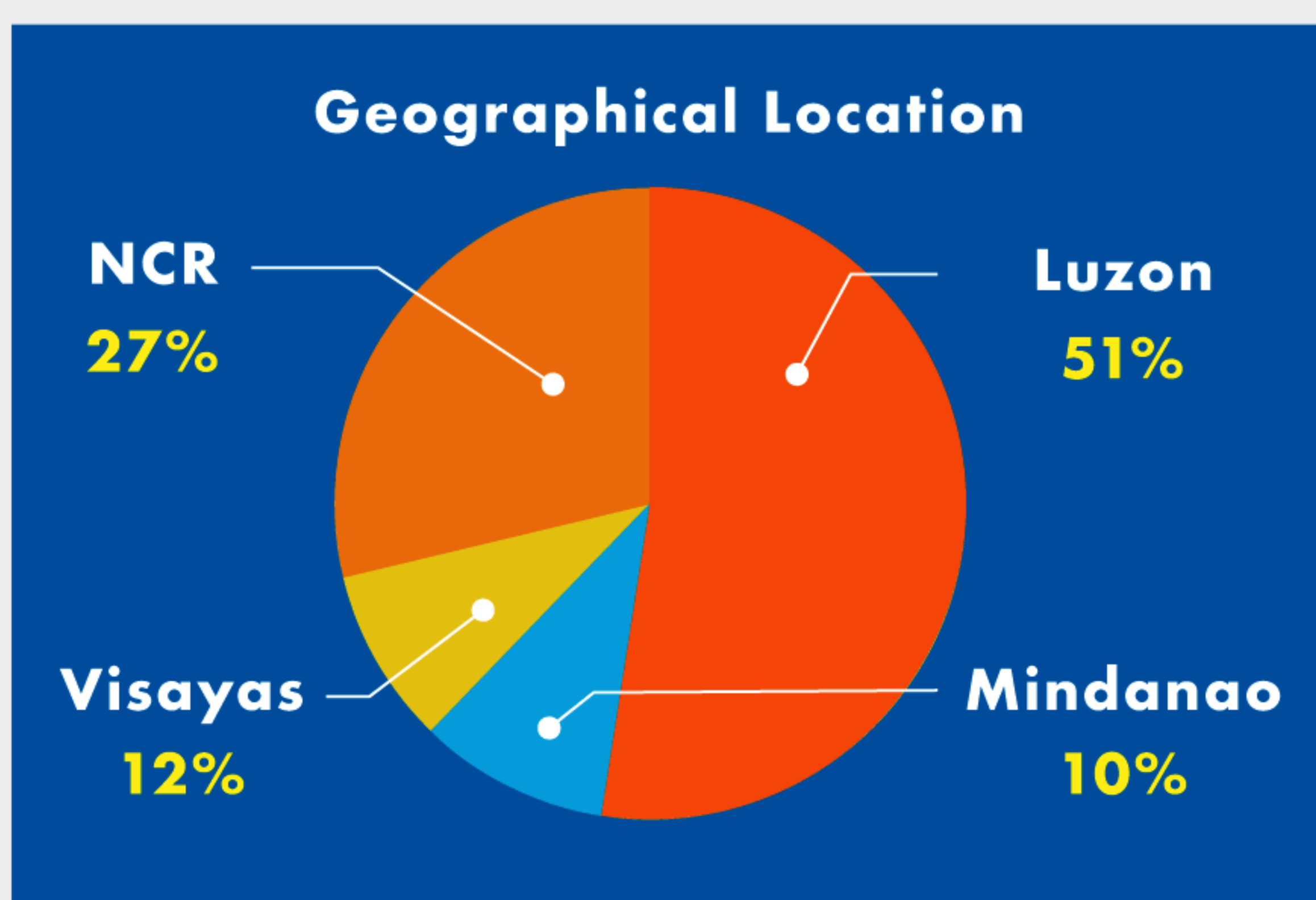
Respondents by Marital Status



Respondents by Household Income



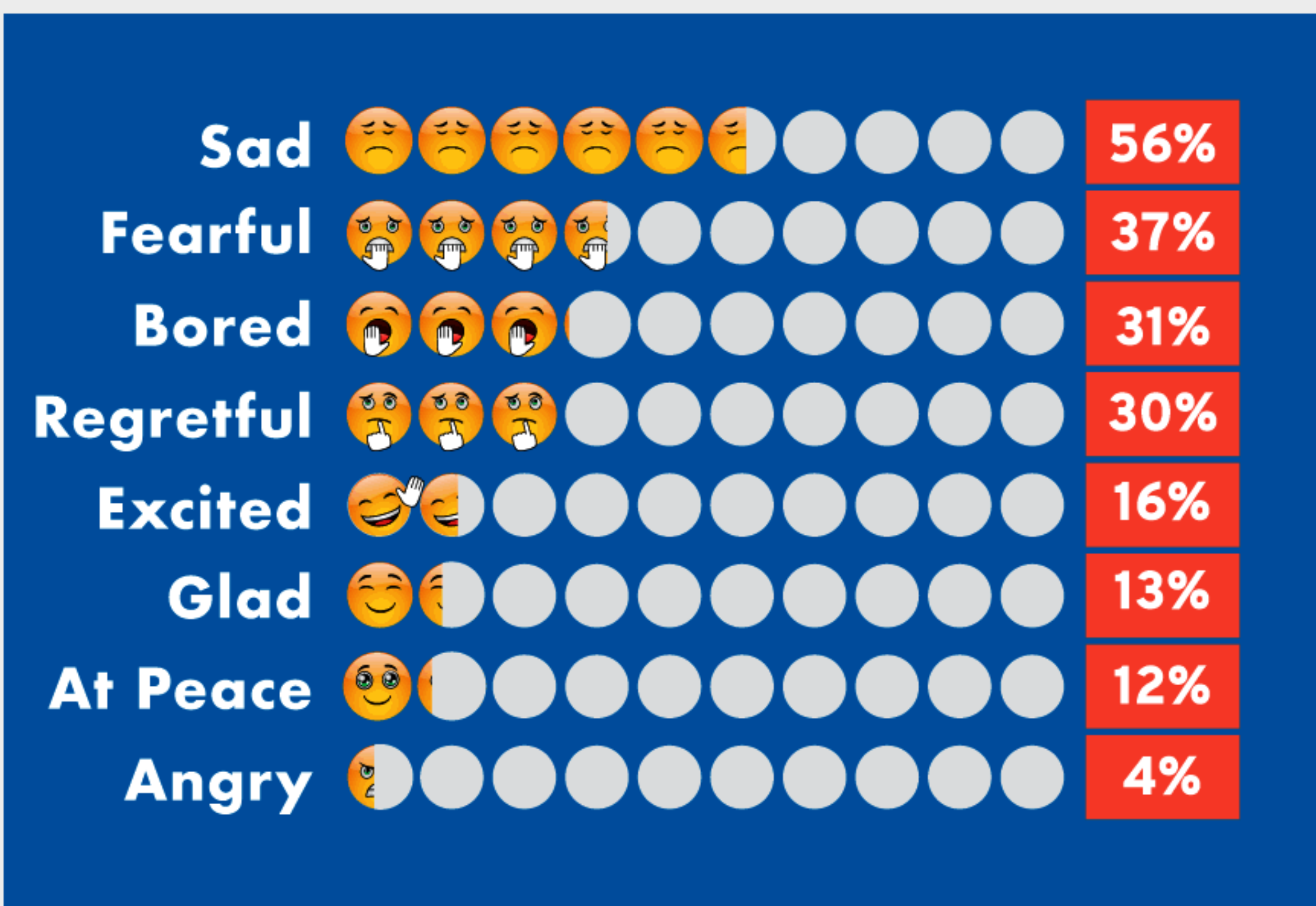
Respondents by Geographical Location



Results

Emotional State of Mind

Filipinos describe their state of mind as a myriad of emotions - ranging from sadness to fear, boredom, regret and at the lowest end, anger.



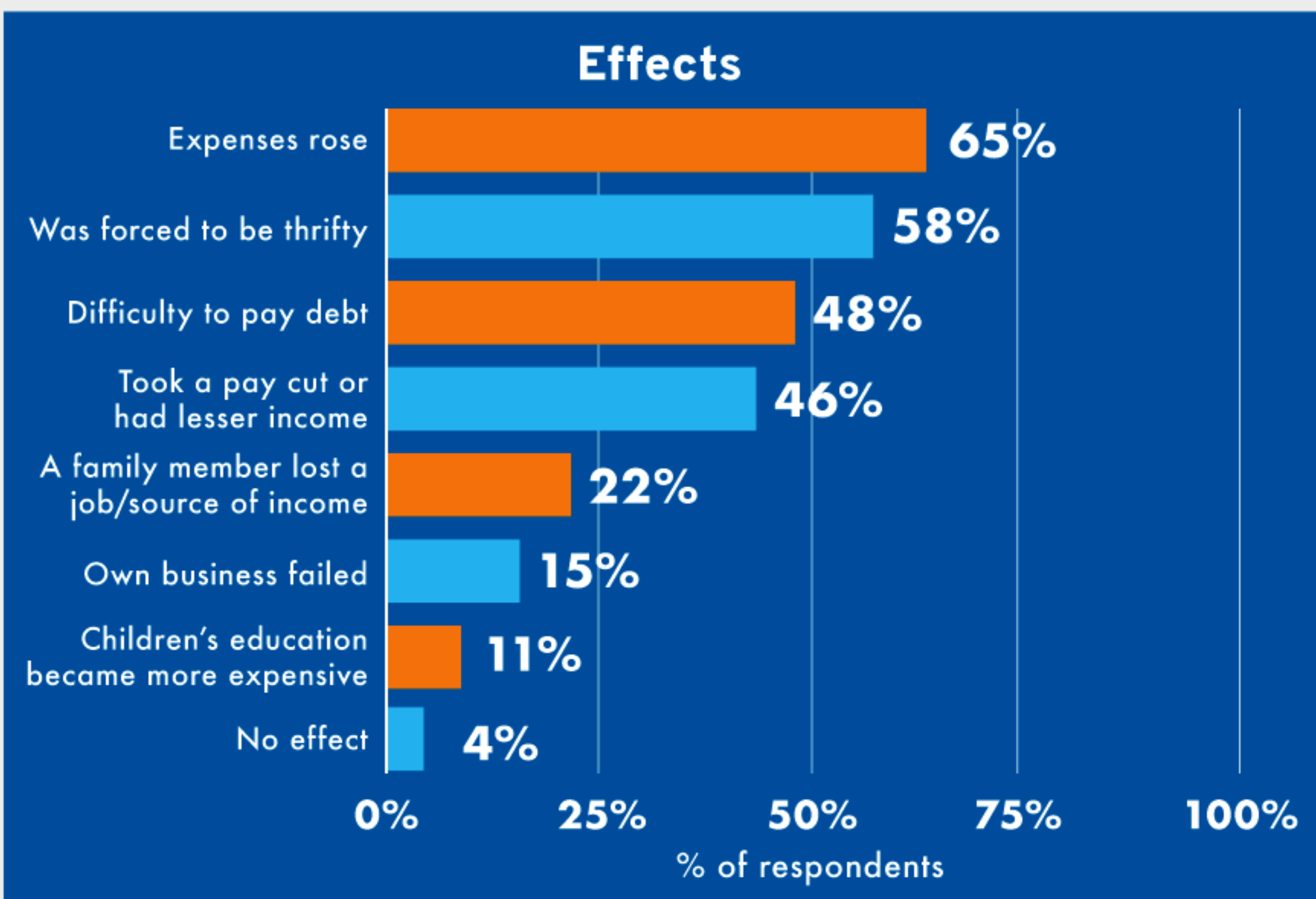
What they fear the most

Despite all the information that is readily available, Filipinos still live in conscious fear that Covid-19 will drastically affect their lives.

They still fear that -	
A family member could get sick and need to be hospitalized	72%
A family member could get Covid-19	67%
They will be unable to pay their debts	51%
They'll experience negative side effects from the COVID-19 vaccine	51%
They'll lose their jobs	48%
They'll be unable to do their class modules	25%
Their business will fail	18%
The PPEs they wear will be ineffective against COVID-19	16%

Effects of the pandemic on personal finances

The impact of Covid-19 has shown us the struggle of Filipinos in dealing with a rise in both risks and expenses in their daily lives.



Gaps in the new norm

2020 allowed Filipinos to bridge gaps in service mobility through digital banking and delivery services.

Gaps in Services	% of Respondents
Ways to pay utilities online	57%
Speed & reach of internet services	55%
Ways to look for jobs	55%
Ways to transact with government	43%
Safe walkways, biking paths and open parks	37%

Looking Forward

Expectations for 2022

Filipinos remain optimistic about the future of a stabilized economy and a return to a peaceful new normal.



What Needs to Change

To achieve this new normal, Filipinos call for action across multiple dimensions, expecting change from the country's institutions and individuals alike.



Findings

- 1 Acknowledge and validate the circumstances.** The public is painfully aware of the negative effects of the pandemic. Skirting around the issue runs the risk of appearing tone-deaf or out of touch. Messaging that validates the ongoing struggles will resonate better with consumers.
- 2 Be realistic, but optimistic.** While Filipinos are honest about their negative experiences and feelings, they also express a strong desire to get past this dark period. Communicate how engagement with you helps them move forward.
- 3 Partner with a purpose.** The public has made it clear that getting to the newer, better normal requires everyone to mobilize. Sharing the work that you're doing alongside other industry pioneers and community builders will help people align with your cause.
- 4 Tap into renewed financial vigilance.** The opportunity to strengthen financial literacy is there given how the prolonged quarantine has dealt a huge blow on many household's financial resources. Developing new products that spell convenience and easy access in anticipation of the recovery period post pandemic would be prudent.
- 5 Digital remains to be a field full of opportunities.** The sudden onboarding of a large segment of previously non-digital consumers opens doors for more online transactions and engagements through crossover platforms.

Key Insights

- 1 Health has become a priority.** Despite the way our culture is stereotyped as fatalistic with a *bahala na* attitude, respondents have shown a clear understanding of the pandemic's adverse impact on their physical and mental health and those of their loved ones. This has led to heightened consciousness about strengthening the immune system, personal hygiene and self care that has put it on top of the priority list.
- 2 The financial impact of the pandemic has encouraged creativity.** The emergence and success of small businesses and side gigs as a way to make ends meet and/or address debt reflect the agility of the public's response to this issue.
- 3 Public health and safety are collective responsibilities.** The resurgence of the *bayanihan* spirit in response to gaps in public services has encouraged the average Juan or Juana dela Cruz to become more active participants in their communities, volunteering time and services when called upon by the needs of the moment.



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EON's Trust Central leads the creation of **EON Insight** and together with **Tangere**, an emerging market research company, they conduct deep dives into various industries and changing consumer behavior through Tangere's survey app.