

Covid-19 & Movement Control Order - An update for Malaysia

April 10th, 2020

Executive Summary

- With Covid-19 infections increasing, Malaysians are feeling more concerned about the virus. Majority of Malaysians agree that the Movement Control Order (MCO) was a good move and are confident that the authorities will be able to manage it well. Most Malaysians are also compliant with the MCO, only leaving their homes when they have to.
- Most Malaysians believe that the virus outbreak will end by this year. The economic situation though, is only expected to recover by 2021. More Malaysians are now being financially impacted in comparison to prior MCO implementation.
- As we enter Week 3 of the Movement Control Order (MCO), online shopping has been increasing for both grocery shopping and online shopping platforms. Respondents are also purchasing grocery items via online shopping platforms
- Respondents are also seen to be more conservative when it comes to investments after the Movement Control Order (MCO) was implemented. However, there is an increase of intention to purchase both medical and life/general insurance once the Movement Control Order (MCO) was implemented
- With the increase of Covid-19 cases, respondents are more likely to be conservative with outings once the Movement Control Order (MCO) is lifted

Fieldwork Date and Sample Plan

MY Covid-19 Study – Fieldwork: 13th to 16th March 2020

About respondents

Gender, 58% “Female”; 42% “Male”. Age groups “25 to 35 years old” and “36 to 45 years old” accounted for 48% and 32% respectively. 54% of the respondents were “Malay”, followed by 36% “Chinese”, and 10% “Indian/others”. 55% of respondents were from “Central” region. 54% of respondents have a household income of “RM5,001 and above”.

Source: Online Panel

MY Covid-19 Study 2 – Fieldwork: 25th to 26th March 2020

About respondents

Gender, 49% “Female”; 51% “Male”. Age groups “25 to 35 years old” and “36 to 45 years old” accounted for 44% and 26% respectively. 57% of the respondents were “Malay”, followed by 32% “Chinese”, and 11% “Indian/others”. 57% of respondents were from “Central” region. 59% of respondents have a household income of “RM5,001 and above”.

Source: Online Panel

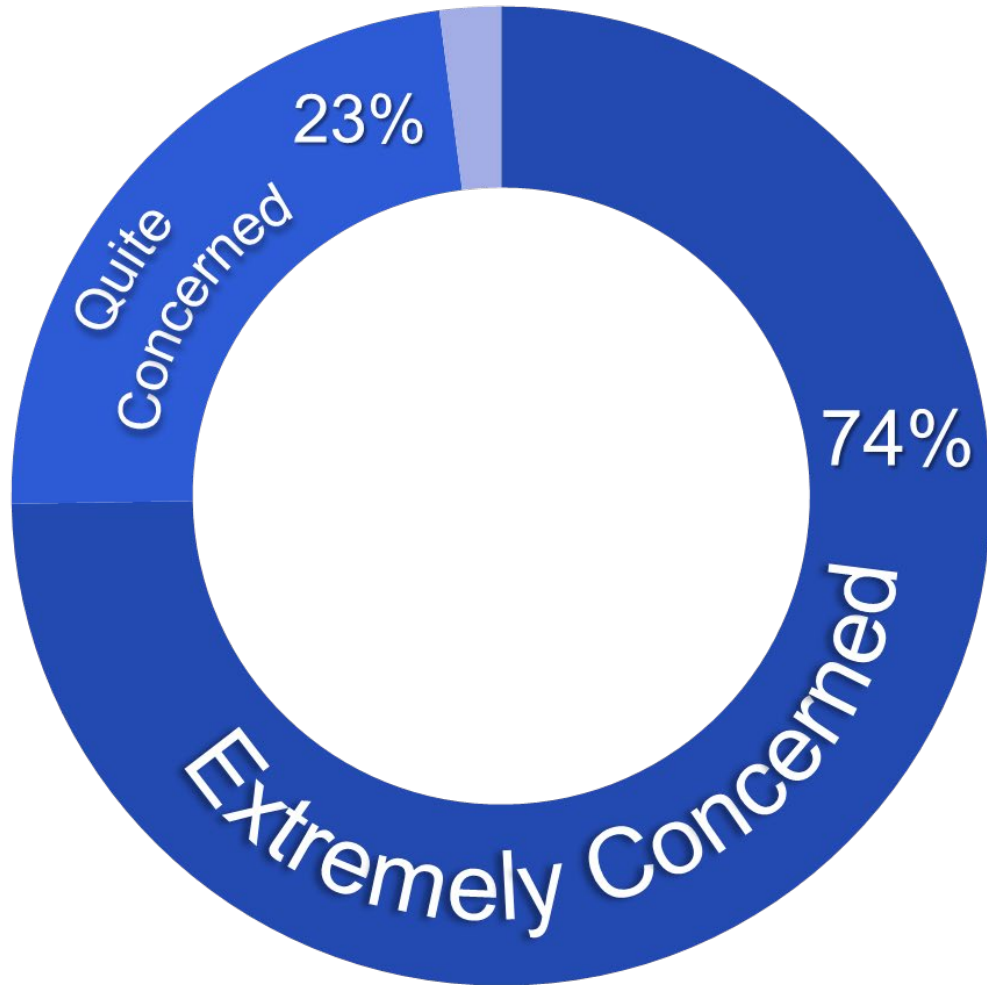
MY Covid-19 Study 3 – Fieldwork: 8th to 9th April 2020

About respondents

Gender, 49% “Female”; 51% “Male”. Age groups “25 to 35 years old” and “36 to 45 years old” accounted for 41% and 31% respectively. 59% of the respondents were “Malay”, followed by 31% “Chinese”, and 10% “Indian/others”. 68% of respondents were from “Central” region. 55% of respondents have a household income of “RM5,001 and above”.

Source: Online Panel

97% of Respondents are Concerned about Covid-19



85%

Are constantly monitoring Covid-19 cases (+1.7%)

Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

Positive Perception on Movement Control Order (MCO)



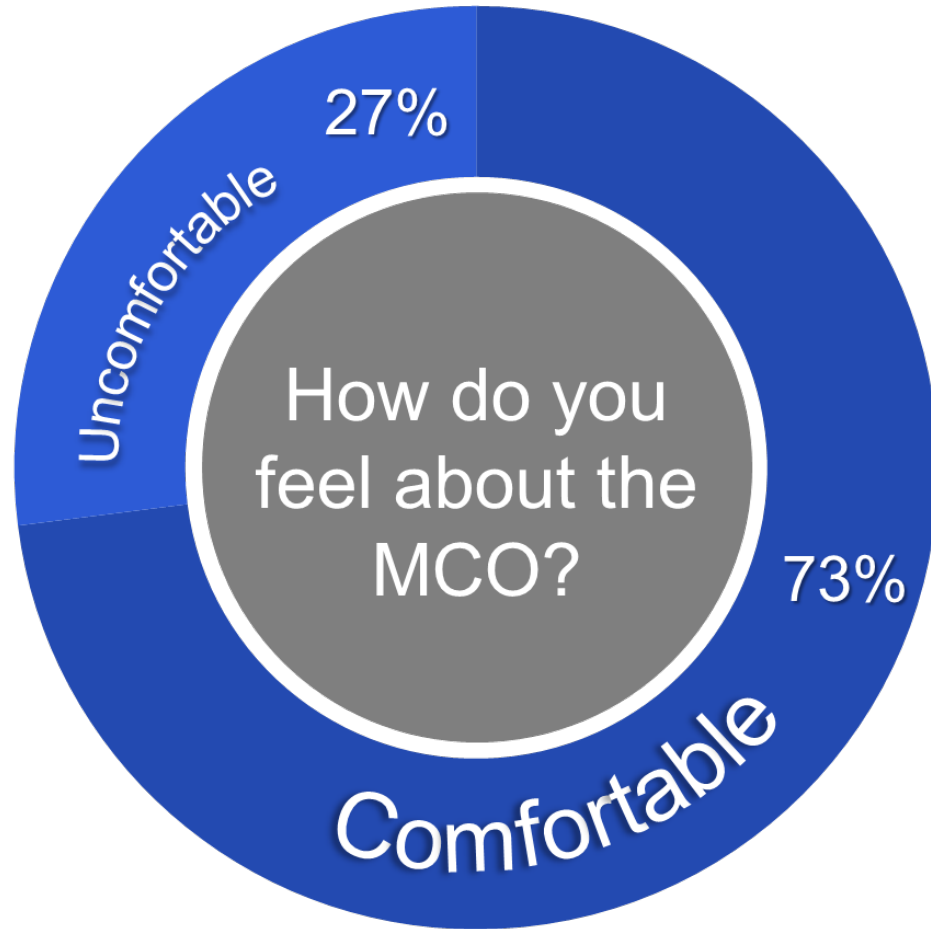
95% **Agree** that the MCO implementation by the authorities was a **good move** (+1%)



93% Are **confident** (29% - extremely confident, 41% - very confident, 23% - somewhat confident) with the **authorities managing the MCO**

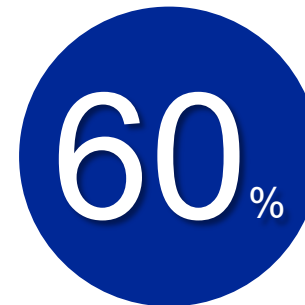
Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

Respondents are Coping Well during the MCO

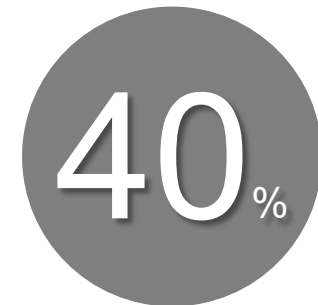


82%

Are working from home



Work productivity is **manageable** during the MCO (+6%)

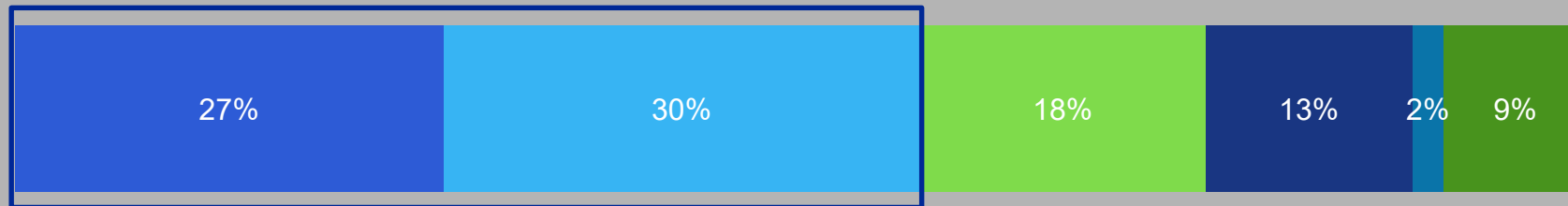


Work productivity has **suffered** during the MCO (-6%)

Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

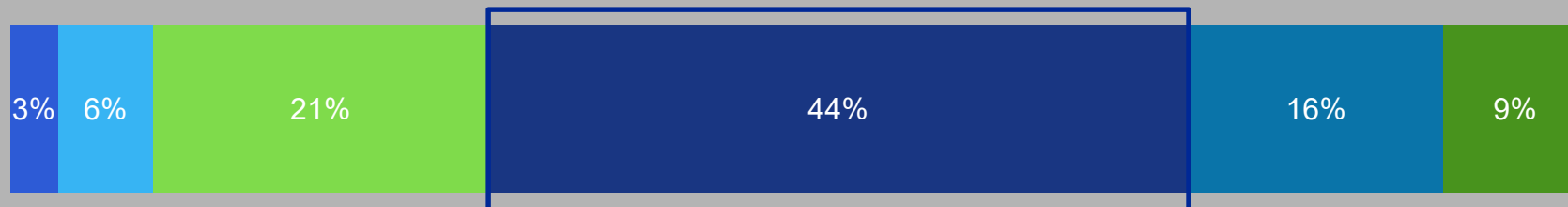
Expectation on Virus Outbreak to End & Economy Recovery

Virus Outbreak to End



Majority of consumers expect the **outbreak to end by 2020**, with 57% expecting it to end before Sept (-8%)

Economy to Recover

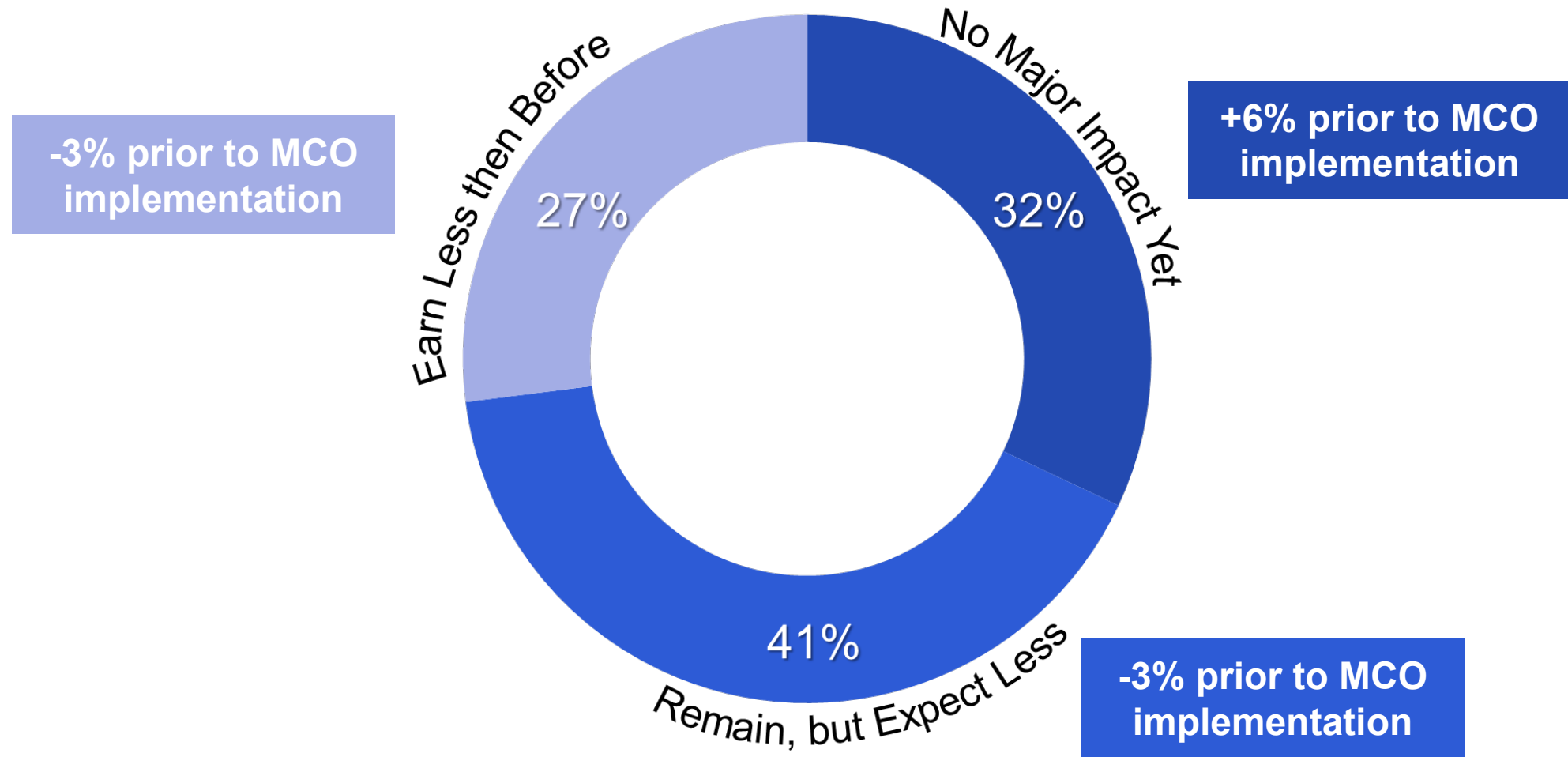


Majority of consumers expect the **economy to recover in 2021, 44%** (+2%)

■ April to June 2020 ■ July to Sept 2020 ■ Oct to Dec 2020 ■ 2021 ■ 2022 and more ■ Not sure

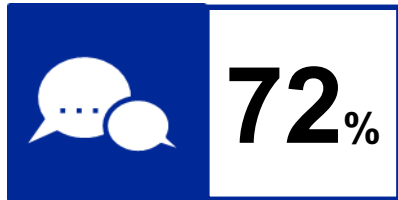
Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

3 Weeks into the Movement Control Order (MCO), 68% of Respondents might be Impacted Financially



Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

Activities During the Movement Control Order (MCO)



I have increased my usage of **communication apps** (WhatsApp, WeChat, Telegram, etc.) to keep connected with family, friends and work



I am cutting down on **unnecessary spending**



I have increased my usage of **social media** (Facebook, Instagram, etc.) to keep connected with family and friends



I have purchase products **via online shopping platforms** (Lazada, Shopee, Zalora, etc.)



I have purchased food via **delivery services** (Grab, FoodPanda, McDelivery, KFC Delivery, etc.)



I have been trying to **balance work and family** as everyone is at home



I have been subscribing to **online platforms** for entertainment (Netflix, Spotify, etc.)



I have **purchased groceries online** (Happy fresh, Tesco Online, etc.)



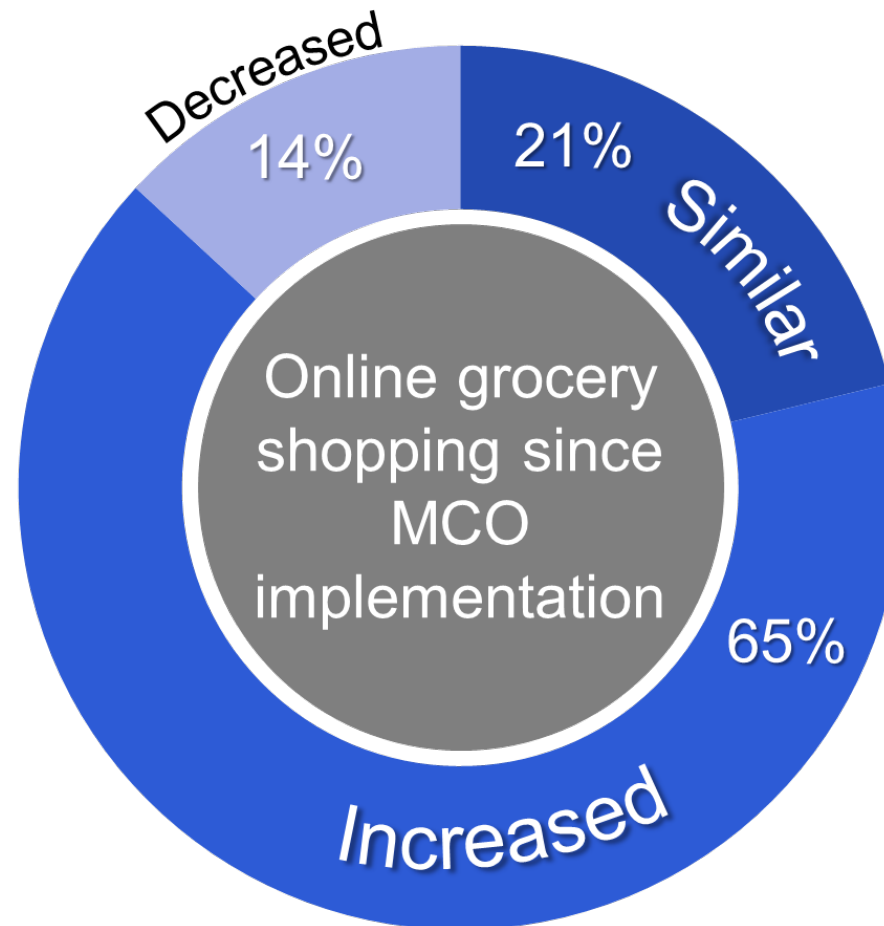
I have been subscribing to **online platforms to educate the kids**

Source: MY Covid-19 Study 2 (n=404)

Shopping Behavior During the Movement Control Order (MCO)



I have **purchased groceries online**
(Happy fresh, Tesco Online, etc.)
(+5%)



Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

Shopping Behavior on Shopping Platforms During the Movement Control Order (MCO)



I have purchase products **via online shopping platforms** (Lazada, Shopee, Zalora, etc.) (+14%)



47% Personal care products (shampoo, body shampoo, lotion, toothpaste, fragrances, etc.)



46% Healthcare & supplements (vitamins, meal replacements, nutritional beverages, medication, etc.)



45% Home care products (detergent, floor cleaner, anti bacterial wipes, multi-purpose cleaning solution, etc.)



44% Groceries for food (rice, fresh/raw meat, vegetables, eggs, canned food, cooking oil, condiments, milk, bread, etc.)



27% Beauty products (skin care, make-up, etc.)



25% Electronic devices (smartphones, laptops, tablets, gaming consoles, etc.)



24% Babies & toys products (diapers, toys, etc.)



20% Home appliances (microwave, oven, toaster, kettle, washing machine, vacuum machine, etc.)



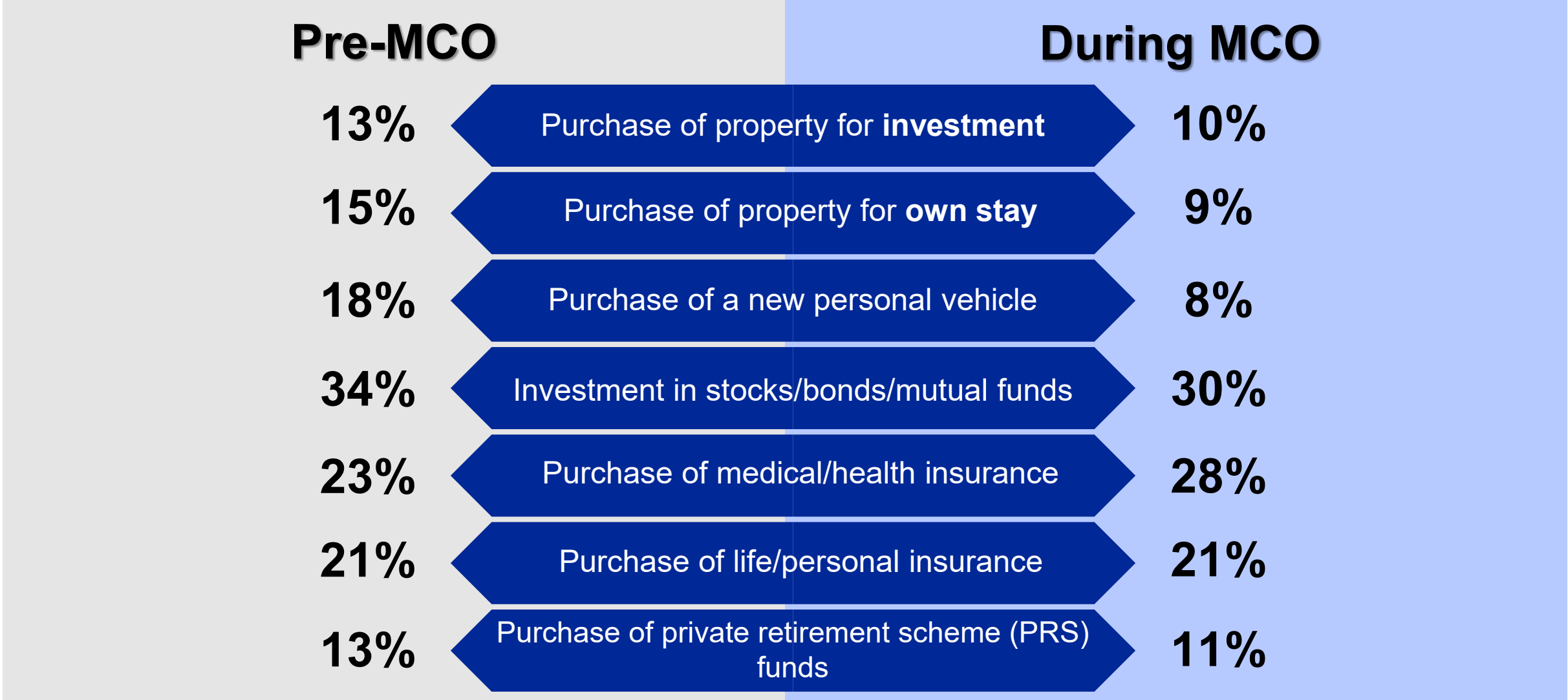
18% Clothes



15% F&B e-coupons (KFC, Burger King, etc.)

Source: MY Covid-19 Study 2 (n=404), MY Covid-19 Study 3 (n=423)

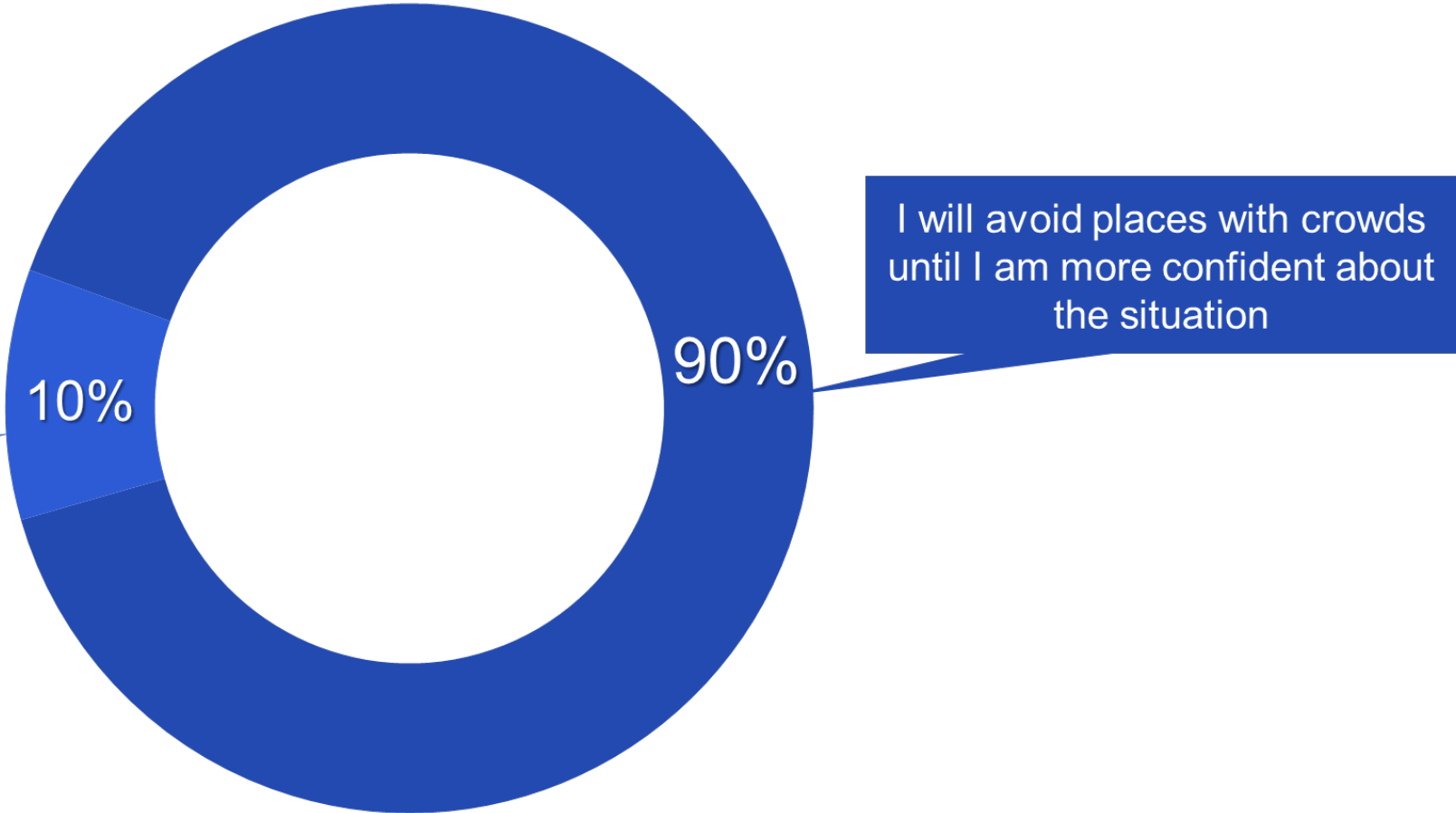
Investment Considerations



Source: MY Covid-19 Study 3 (n=423)



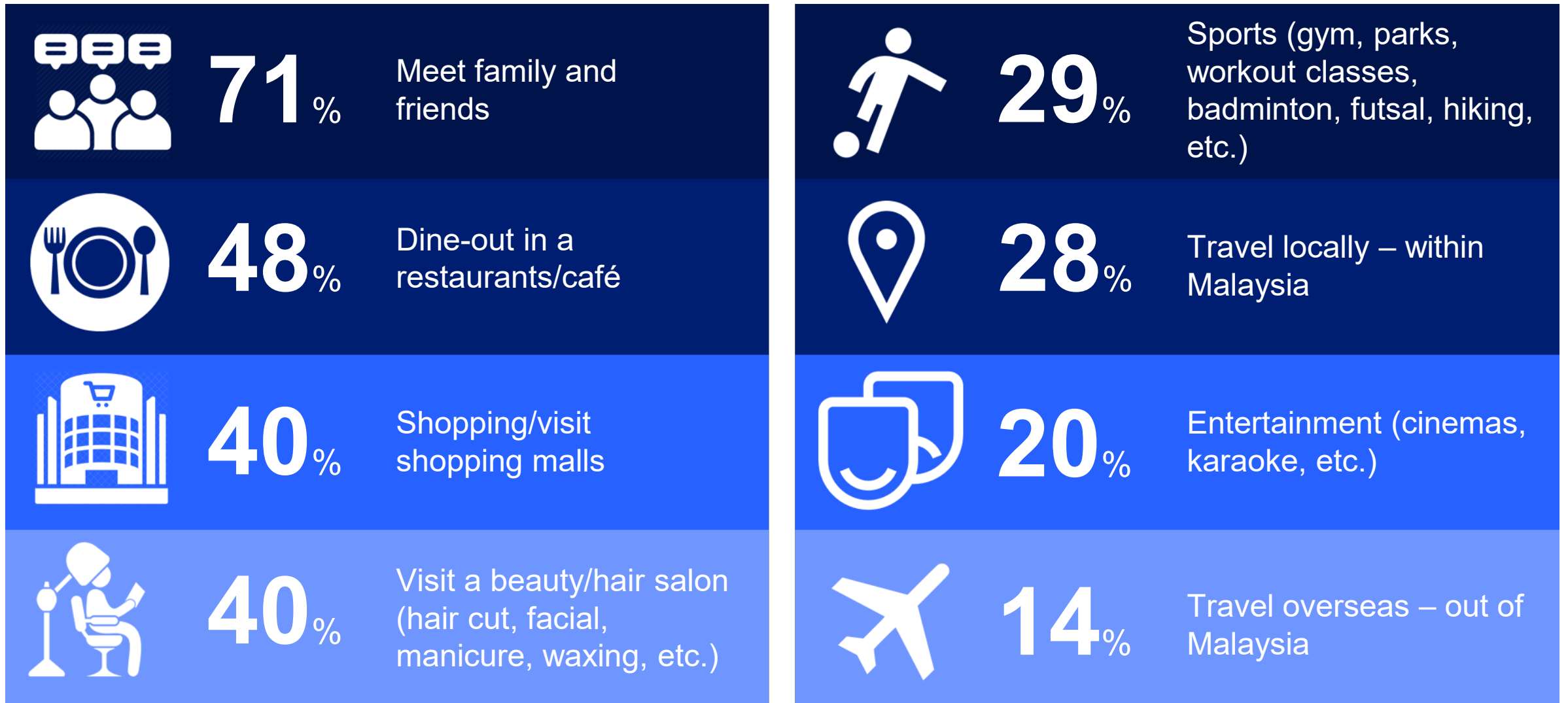
Respondents are Hesitant about Post Movement Control Order (MCO)



Source: MY Covid-19 Study 3 (n=423)



Activities Post Movement Control Order (MCO)



Source: MY Covid-19 Study 3 (n=423)

Rakuten Insight

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