



**What Brands Should Know:
Coronavirus & Consumer Impact
Southeast Asia**

About The Report

As the Coronavirus situation continues to evolve, people are being encouraged to stay at home in order to ensure their health and safety.

Across Asia Pacific (APAC), more than half of the respondents have started working from home and cut back on social and outdoor activities.

This report analyzes the shift in mobile behavior and consumer sentiments in Southeast Asia (SEA) during COVID-19 crisis. The survey was conducted by AdColony across people living in SEA. Respondents' ages ranged from 18 to 75 and were typically aged 25 to 54.





Key Shifts in Consumer Behavior



Massive Uplift in Mobile Gaming

46% increase in the number of consumers playing mobile games multiple times per day



Switch to Online Shopping

66% of respondents have purchased something online in the last 2 weeks



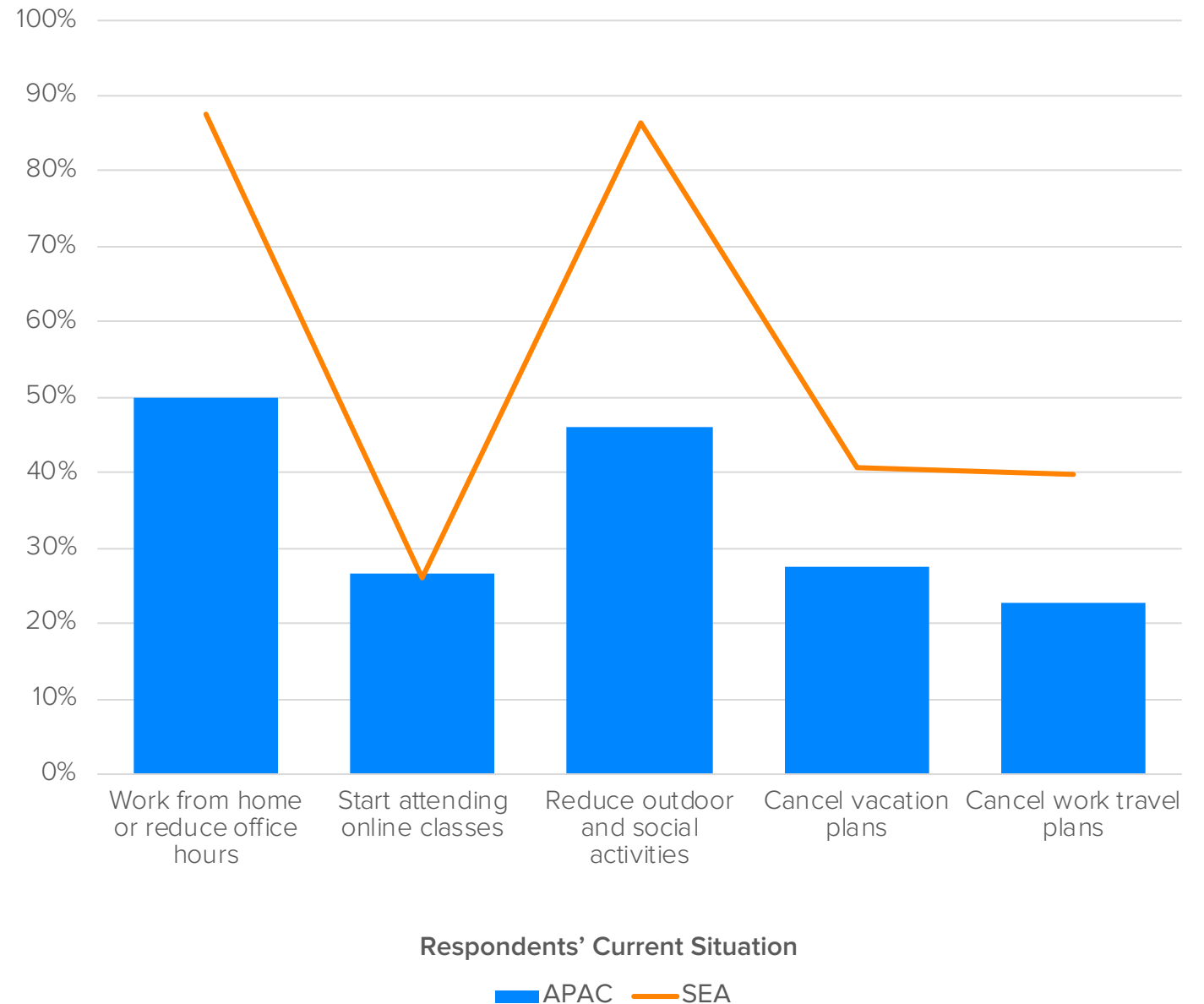
Role of Brands during this Crisis

79% of consumers want brands to continue communicating during this crisis



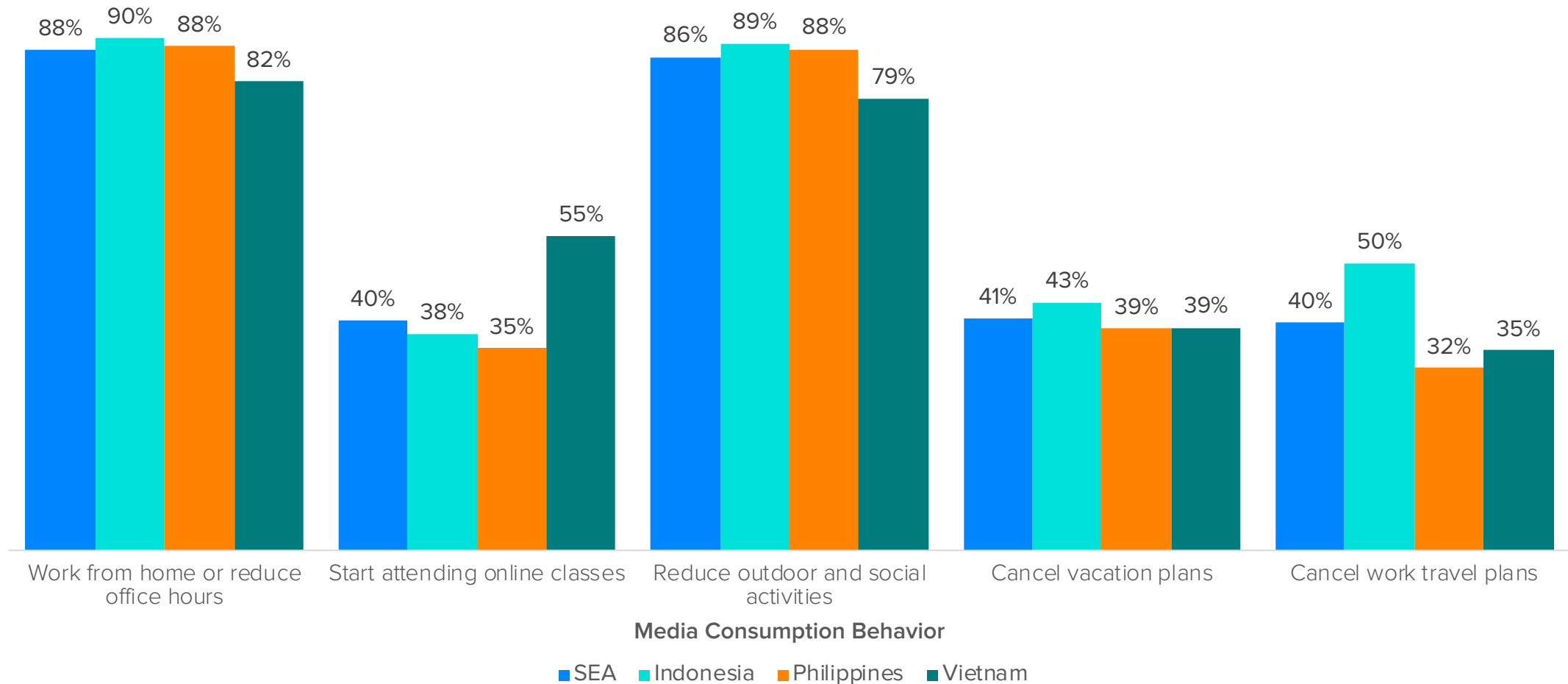
Social distancing
is the new norm in
times of COVID-19

86% have cut back
on social activities
across SEA



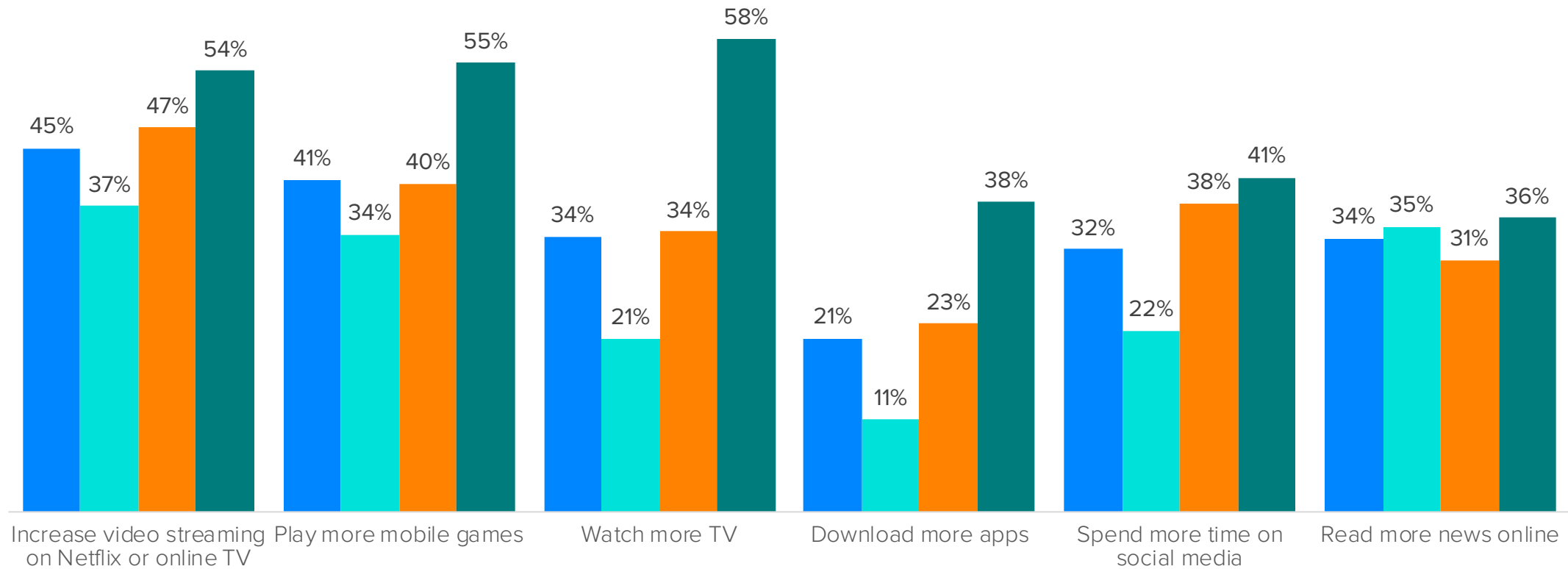


Across SEA, more than 80% of respondents are working from home





Consumers in SEA have increased their time spent on **streaming entertainment** and **mobile gaming**



Media Consumption Behavior During COVID-19

■ SEA ■ Indonesia ■ Philippines ■ Vietnam

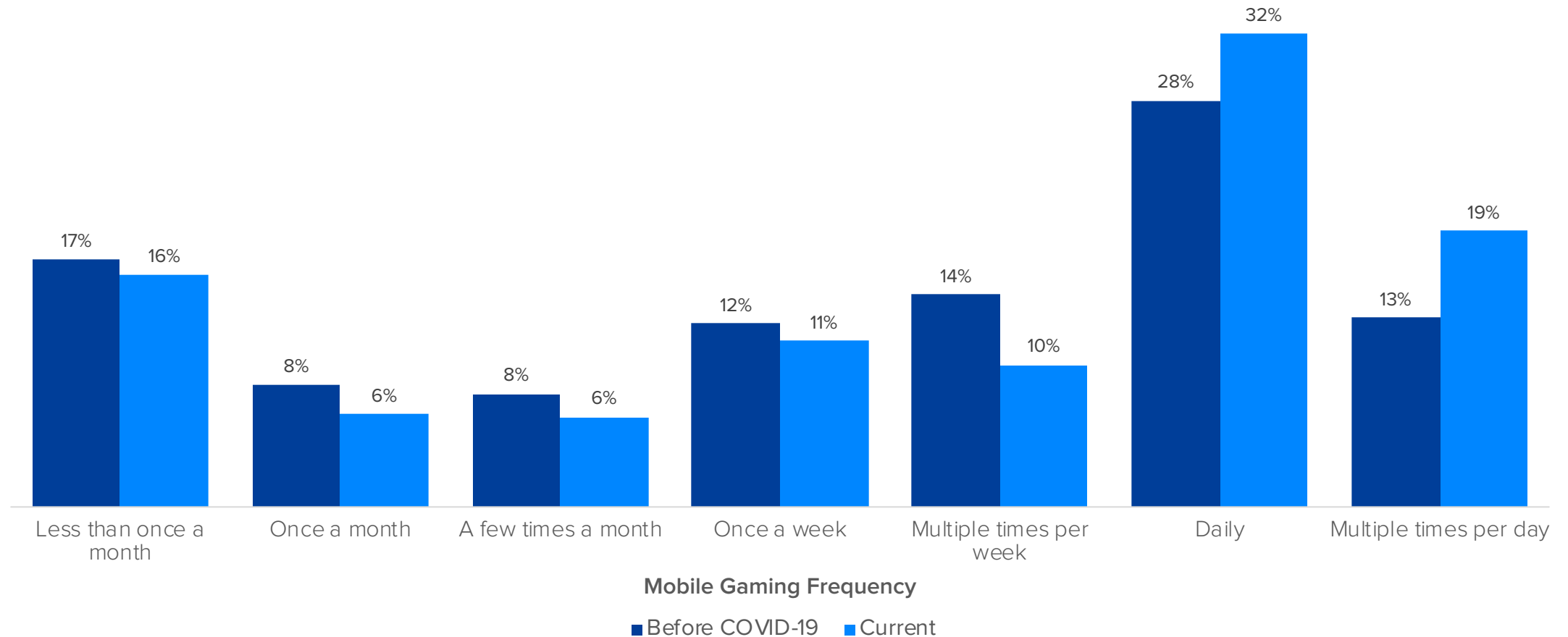


41% are playing more mobile games since the outbreak across SEA

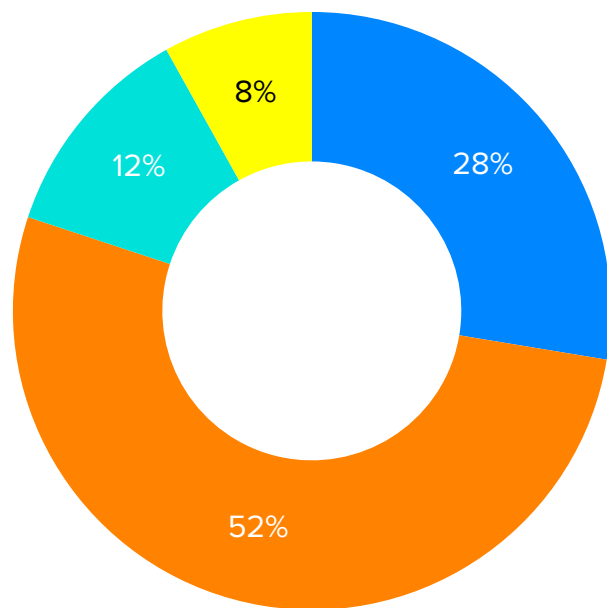
45% of respondents who play games are **female**



46% increase in number of consumers playing mobile games multiple times per day



72% added new games on their smartphone across SEA

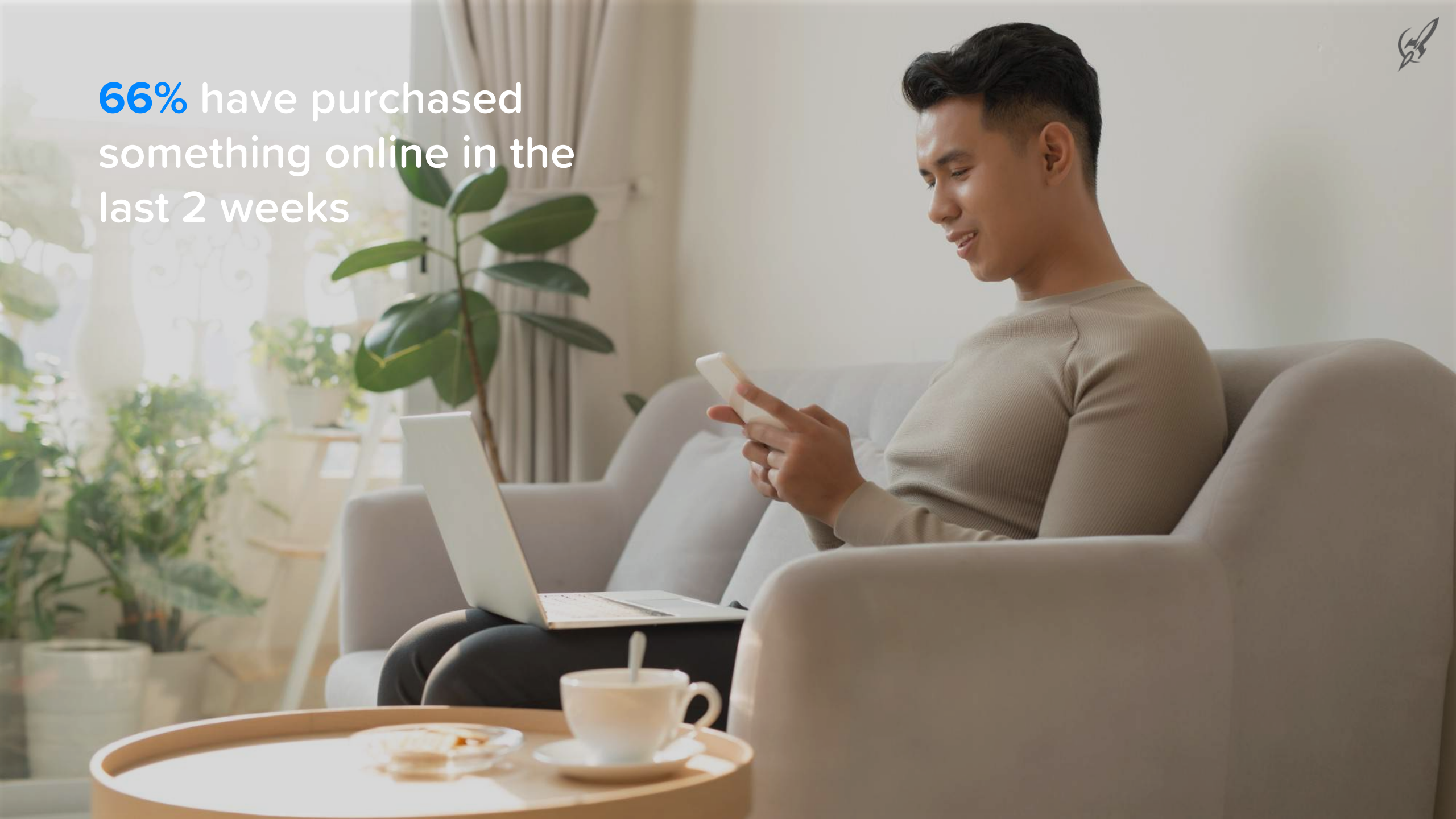


Game Apps Downloaded Since COVID-19

■ 0 ■ 1 - 3 ■ 4 - 5 ■ 6 or more

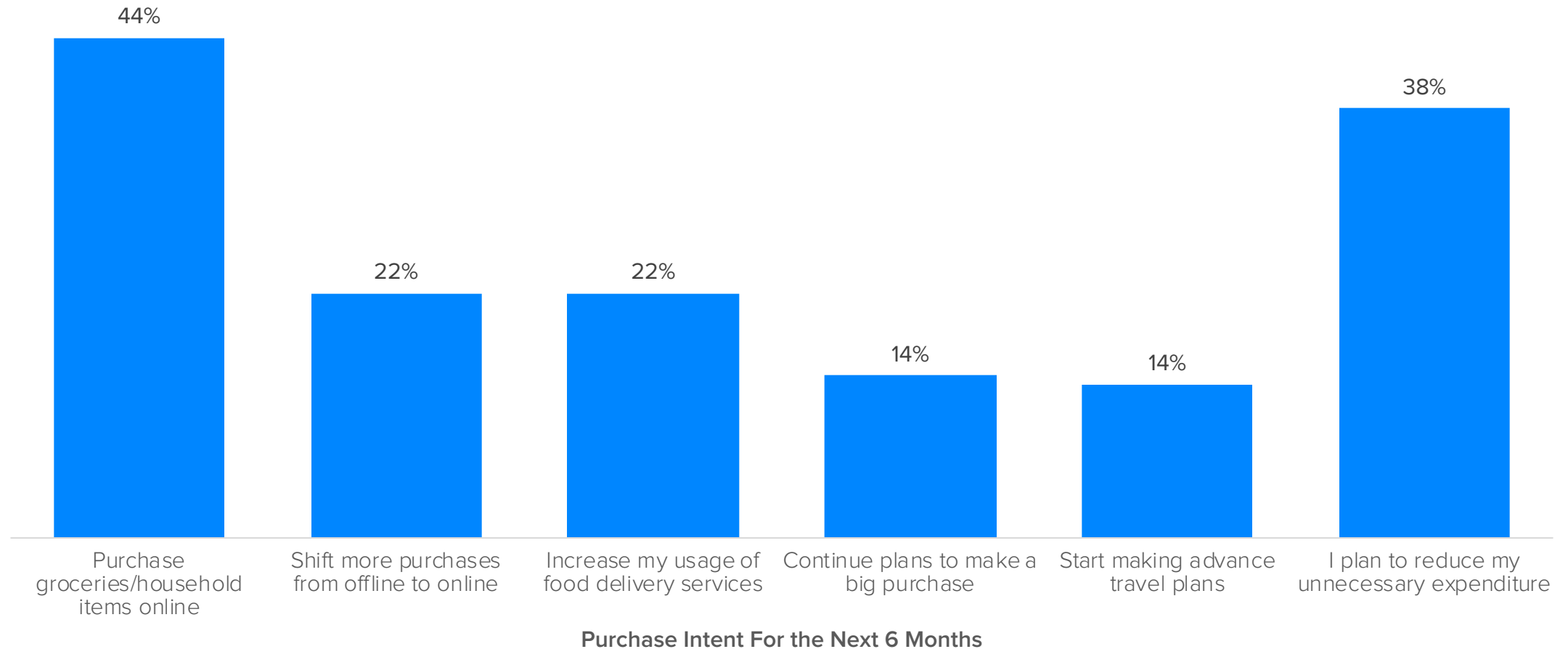


66% have purchased something online in the last 2 weeks





44% are looking to purchase groceries and household items online and **22% will shift their purchases from offline to online**

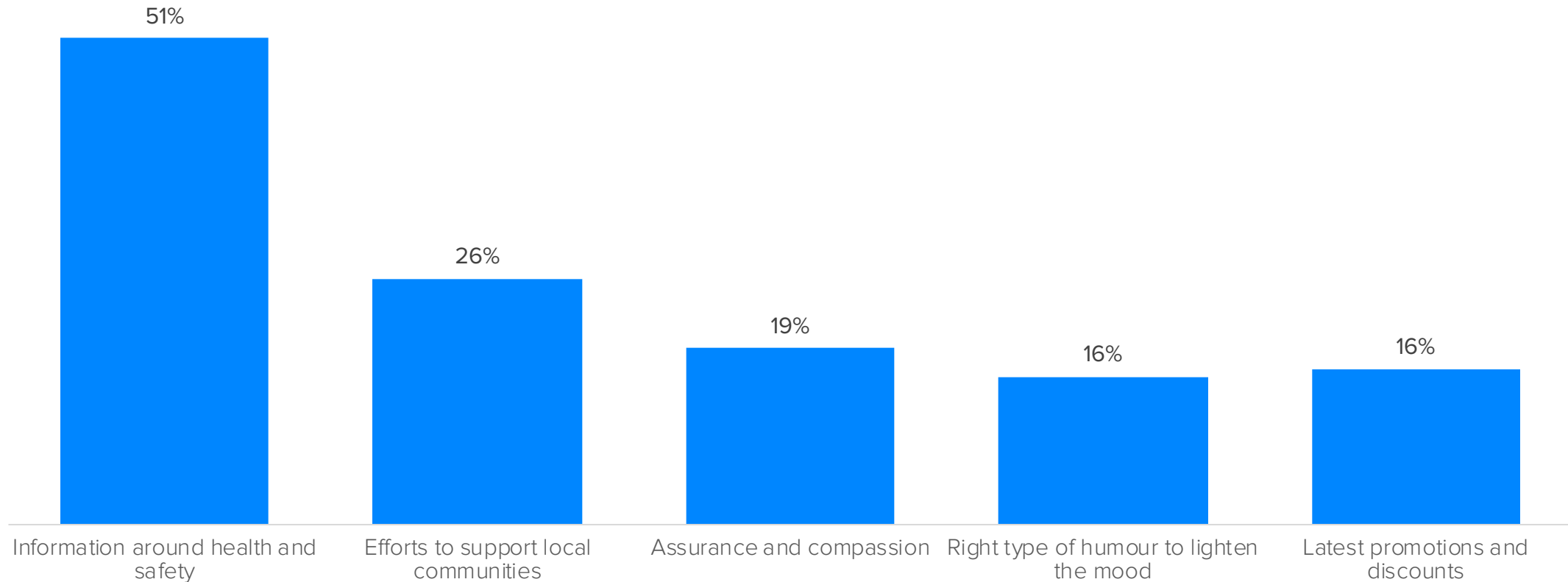


79% of consumers want
brands to continue
communicating during
this crisis





45% state they hope to see ads featuring **compassion and support for local communities**



Consumers Vote On Brand Messaging During COVID-19 Crisis



What should Brands do to address the **Fluid Times and Shifts In Consumer Behavior?**

Stay In Touch

Remain calm and continue your communication and engagement with consumers in the right tone of voice. Make consumers feel that you are available and ready in times of crisis.

Shift Your Media

Understand where consumers are spending more time. With #stayhome guidelines, there is an increase in streaming media and mobile gaming. Shift your media plan accordingly.

Use The Right Creatives

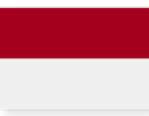
Connect with consumers with the appropriate stills, video creatives and messaging so you do not risk being tone deaf in the current environment.



Mobile Gaming Audience in Indonesia



 **ADCOLONY**



Top mobile behaviour in Indonesia



37% increased time spent on streaming entertainment (e.g. Netflix)



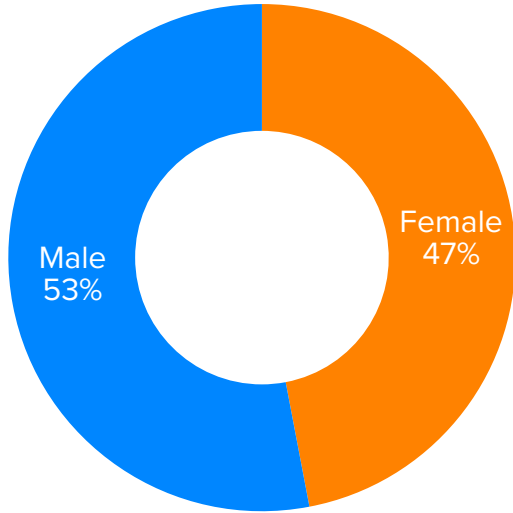
35% are reading more news online



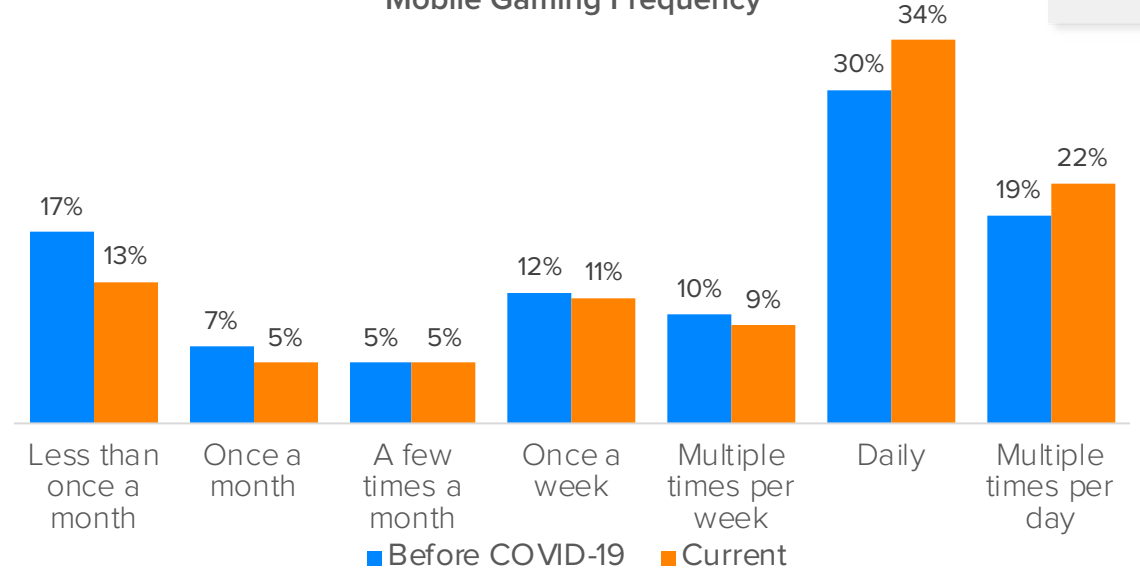
34% are playing more games on their smartphones and tablets



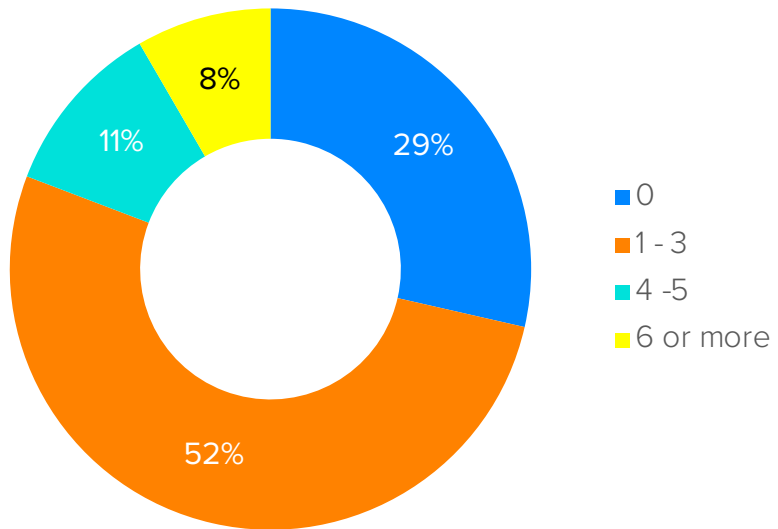
Mobile Gaming Gender Split



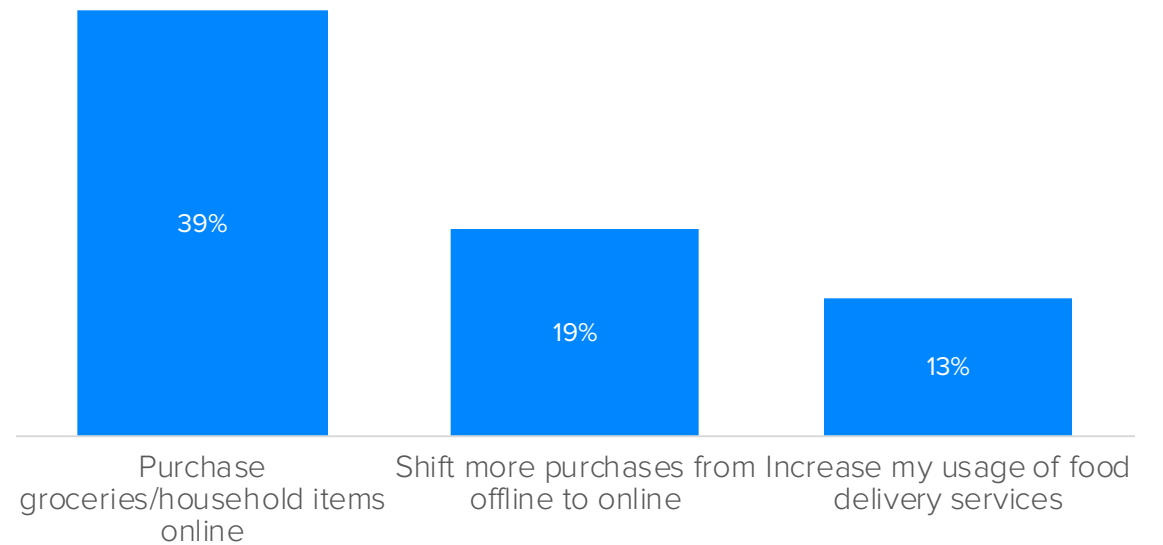
Mobile Gaming Frequency



Game Apps Downloaded Since COVID-19



Purchase Intent In The Next 6 Months



*Results as of 20 March 2020



Automotive

88% have started playing a new game

57% shift more purchases online

26% would like to receive promotions and discounts



FMCG

84% play games frequently; 51% play daily

83% will shift more purchases online

92% want brands to continue communicating during this crisis



Entertainment

72% have started playing a new game

85% play games frequently; 50% play daily

60% play an average of more than 3 games daily



Technology

72% have started playing a new game

83% play games frequently; 51% play daily

64% will shift more purchases online



Religious Topics

36% will increase the spend online for Ramadhan 2020

46% have started playing a new game

28% of people playing mobile games have downloaded an app in preparation for Ramadhan 2020



Parents

77% have started playing a new game

62% play an average of 3 games

62% will not reduce their expenditure for the year



Young Male

65% have started playing a new game

53% play an average of 3 games, while 25% play an average of 4 to 6 games

73% plan to shift more purchases online



Young Female

67% have started playing a new game

31% play an average of 4 to 6 games

70% will not reduce their expenditure for the year



Professionals

32% have doubled their time spent on mobile gaming

75% have downloaded a new game since working from home

57% play an average of 3 games

Mobile Gaming Audience in Philippines



 **ADCOLONY**





Top mobile behaviour in Philippines



47% increased time spent on streaming entertainment (e.g. Netflix)



40% are playing more games on their smartphones and tablets

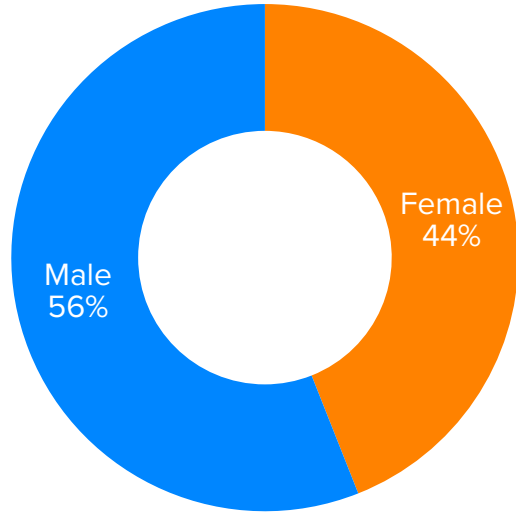


37% are spending more time on social media

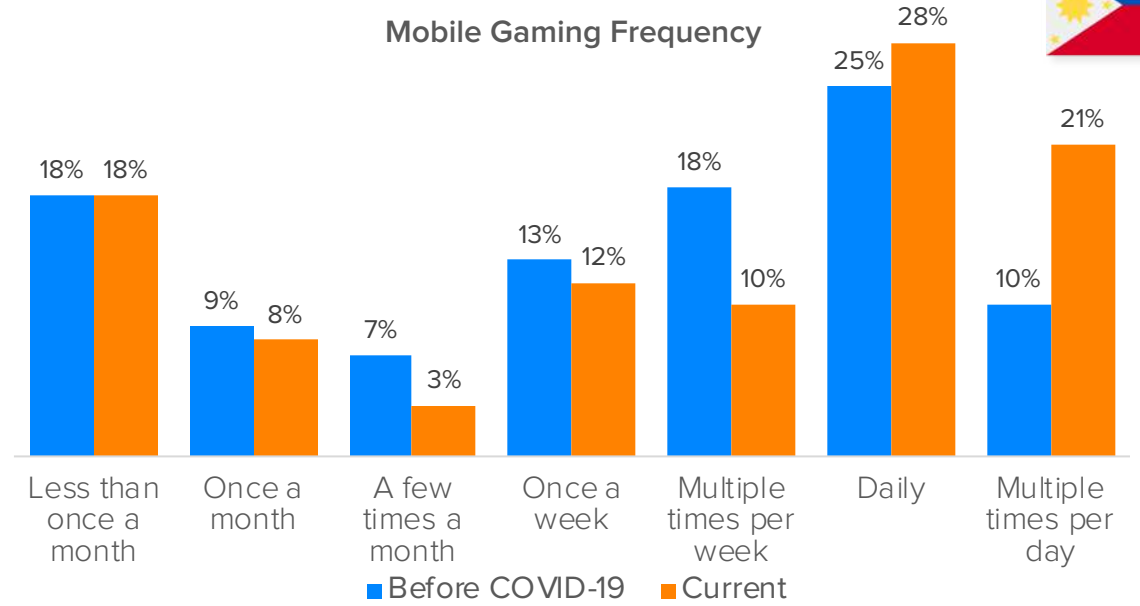




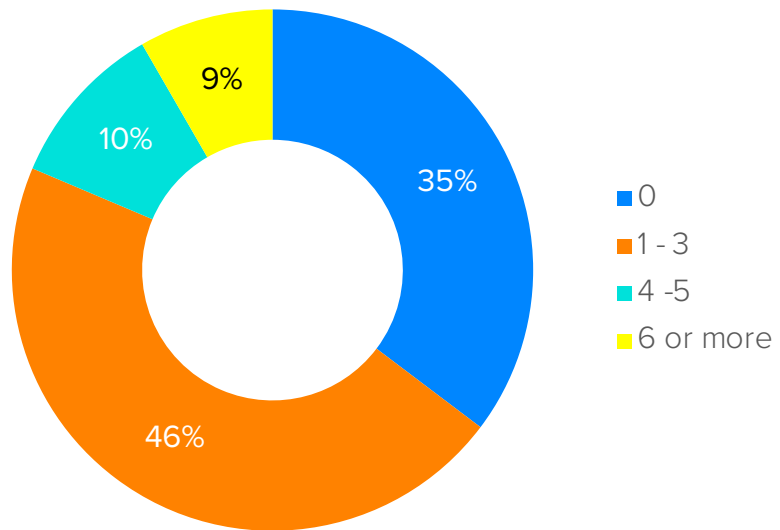
Mobile Gaming Gender Split



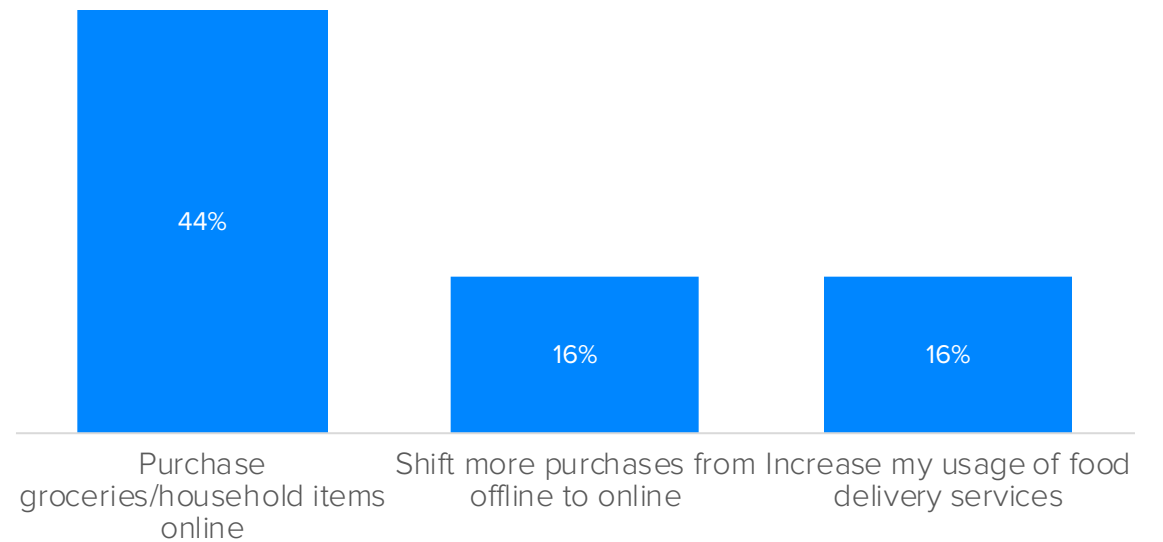
Mobile Gaming Frequency



Game Apps Downloaded Since COVID-19



Purchase Intent In The Next 6 Months



*Results as of 20 March 2020



Automotive

84% have started playing a new game

80% play games frequently;
75% play daily

29% plan to continue their plans for a big-ticket item



FMCG

69% have started playing a new game

60% play an average of 3 games daily

51% have increased their time spent on mobile gaming



Entertainment

64% have started playing a new game

80% play games frequently;
48% play daily

57% play an average of 3 games daily



Technology

88% play games frequently;
54% play daily

57% have increased their time spent on mobile gaming

56% play an average of 3 games daily



Parents

63% have started playing a new game

73% of parents are increasing spend online for household items & groceries

74% of mums have downloaded a new game since beginning of March



Young Male

86% of males play games; 53% play daily

53% play an average of 3 games

56% will increase their online spend for household items and groceries



Young Female

80% of females play games; 49% play daily

49% play an average of 3 games

28% will continue purchase of luxury items and high-end cosmetics



Professionals

38% have doubled their time spent on mobile gaming

61% have downloaded a new game since working from home

62% play an average of 3 games



Mobile Gaming Audience in Vietnam



 **ADCOLONY**



Top mobile behaviour in Vietnam



55% are playing more games on their smartphones and tablets



54% increased time spent on streaming entertainment (e.g. Netflix)

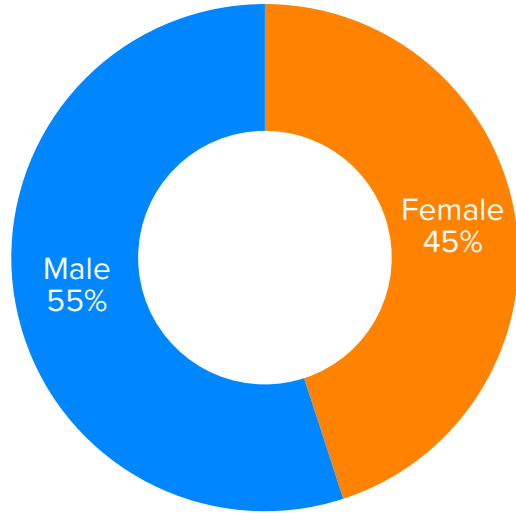


41% are spending more time on social media

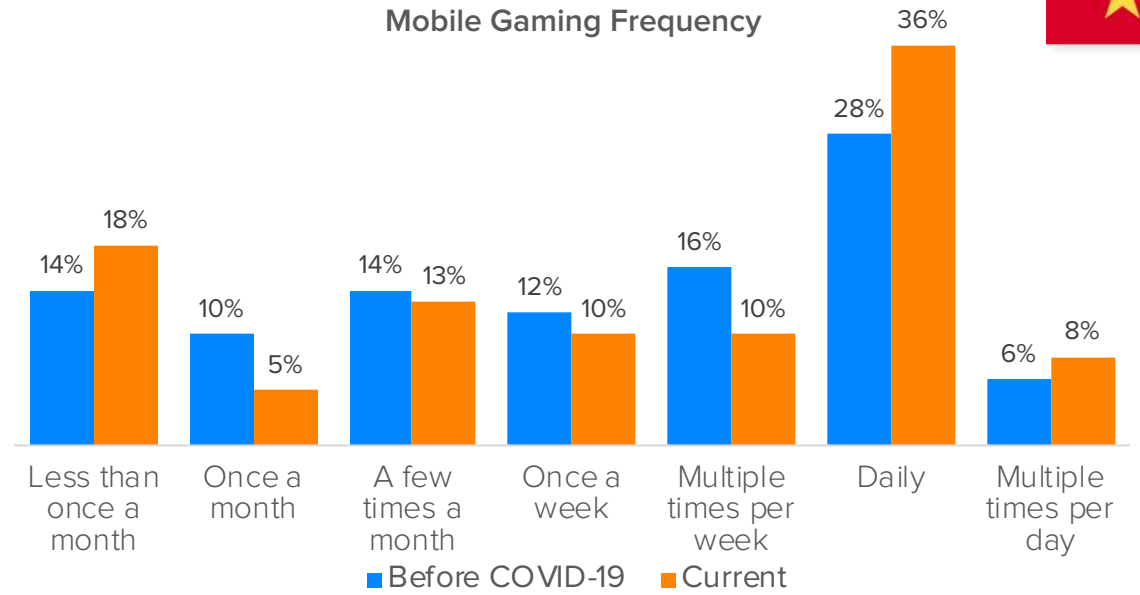




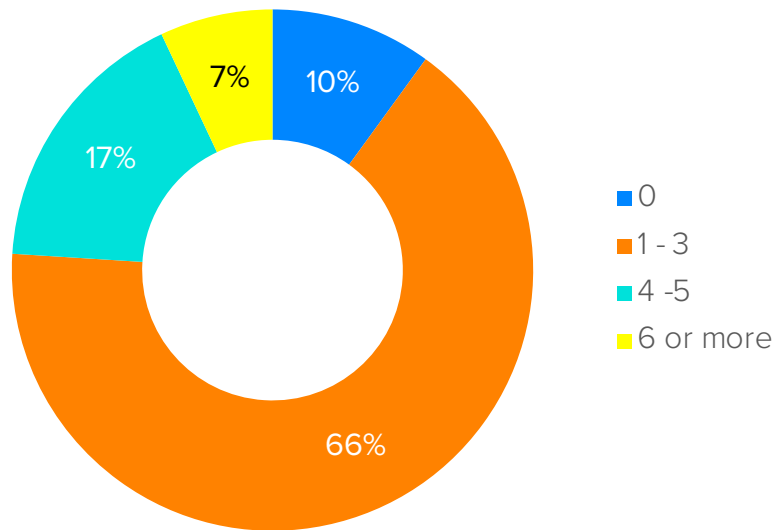
Mobile Gaming Gender Split



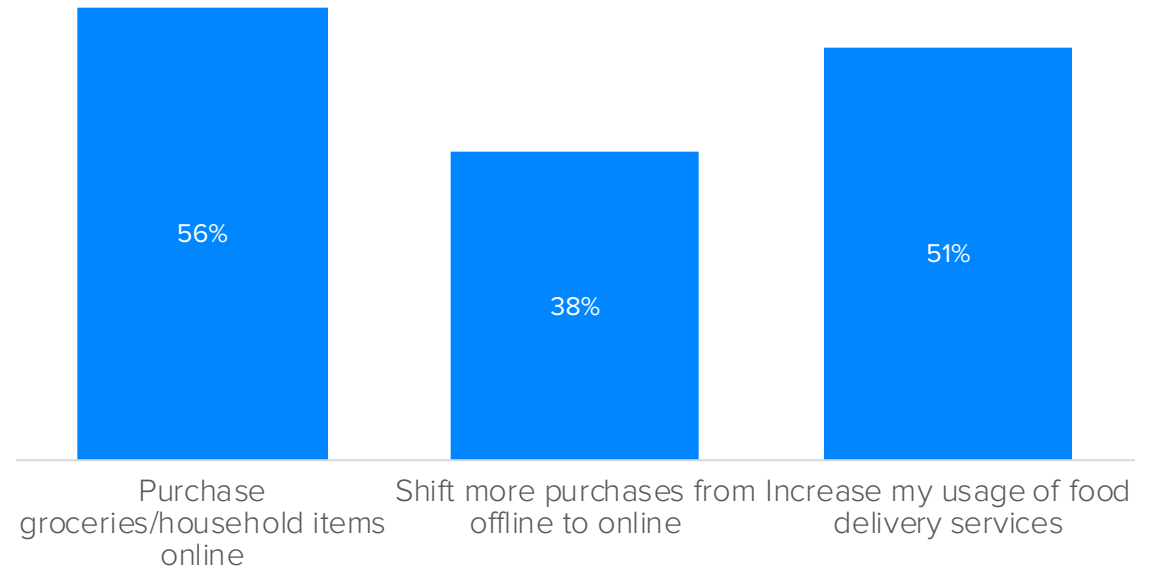
Mobile Gaming Frequency



Game Apps Downloaded Since COVID-19



Purchase Intent In The Next 6 Months



*Results as of 20 March 2020



Automotive

85% have started playing a new game

50% plan to continue their plans for a big-ticket item

54% are still on the look out for the latest promotions despite the crisis



FMCG

47% have increased their time spent on mobile gaming

50% will increase their online spend for household items and groceries

36% play an average of 3 games daily



Entertainment

40% play an average of 4 to 6 games daily

50% have increased their time spent on mobile gaming

38% are still on the look out for latest discounts and promotions



Technology

93% have started playing a new game

42% play an average of 4 to 6 games daily

53% have increased their time spent on mobile gaming



Parents

80% of mums play games

93% of parents are increasing spend online for household items & groceries

47% have increased their time spent on mobile gaming



Young Male

92% have started playing a new game

49% play an average of 4 to 6 games

79% will increase their online spend



Young Female

81% of females play games; 38% play daily

92% will increase their online spend

32% will continue purchase of luxury items and high-end cosmetics



Professionals

49% have doubled their time spent on mobile gaming

91% have downloaded a new game since working from home

58% have increased spend in food delivery apps and online groceries



Educate, empathise and engage with consumers.

Brands may find they can help consumers and society get through this together.

For more local reports and insights, please visit [AdColony](#).

