

# YouKnowAnot

Singapore's Leading Monthly Public Survey

## COMMUNITY SATISFACTION

Those who say they are satisfied with the way things are going in Singapore

Mar | **70**  
Feb | 72

Community Satisfaction down two points



## PERSONAL FINANCES

Those who rate their personal finances as Excellent/Good

Mar | **65**  
Feb | 68

Personal Finances down three points



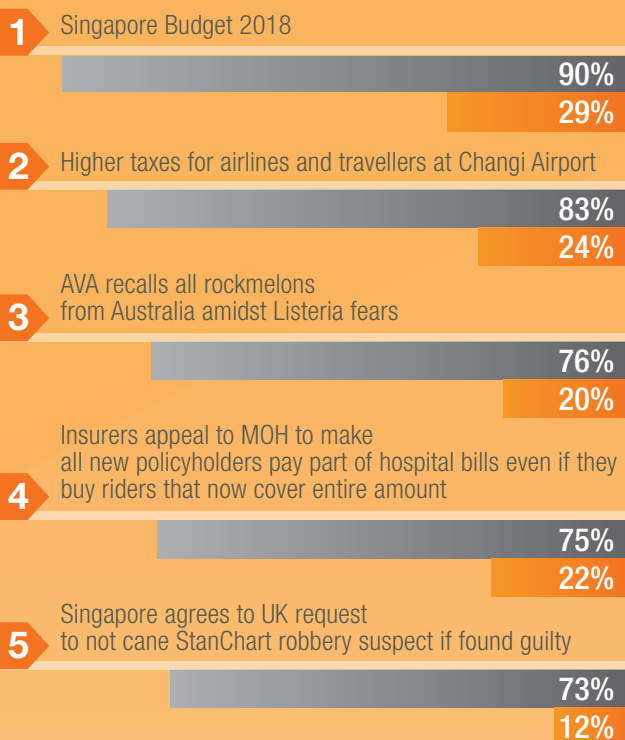
## NATIONAL ECONOMY

Those who rate current economic conditions in Singapore as Excellent/Good

Mar | **73**  
Feb | 73

National Economy stays the same

## Singapore's Top 5 News Stories of the Month



■ % Who Followed the News  
■ % Who Paid Close Attention

## Population Revisited: Where are the babies?

In a recent Parliamentary session, Minister in the Prime Minister's Office Mrs Josephine Teo shared that Singapore's total population is likely to be below 6 million by 2020, and "significantly" below 6.9 million by 2030.

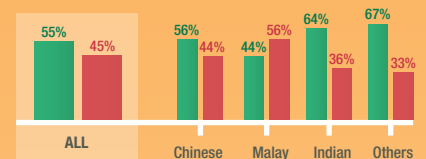
With the Government stating that it is not expecting any major changes in its immigration policy, more than half of Singaporeans (55%) are satisfied with the current population policies. Amongst Malays in Singapore, however, only 44% are satisfied with today's population strategies, raising the question of our changing population dynamics.

The latest population statistics also revealed that Singapore's fertility rate currently stands at 1.16, the lowest it has been for 7 years and significantly lower than the natural replacement rate of 2.1.

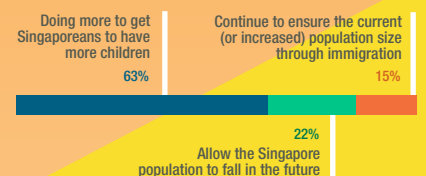
When it comes to the future of the Singapore population, nearly 2 in 3 believe (63%) that the Government should do more to get Singaporeans to have more children while 22% opt for immigration to maintain the population size. Only 15% believe that the population should be allowed to dwindle.

### Satisfaction with Singapore's Current Population Policies

■ Satisfied ■ Dissatisfied



### Moving Forward, How Should the Government Manage Singapore's Population?



## Budget '18: Giveaways Counterbalanced by Reaction to Future GST Raises

Following the Singapore Budget 2018 announcement, Blackbox conducted a survey to find out how Singaporeans felt about the overall plan and key highlights.

Almost all Singaporeans (92%) followed the Budget and its subsequent news coverage, with nearly one in three (31%) paying close attention.

In comparison to the 2017 Budget, more than half of those surveyed (56%) would personally consider the 2018 Budget to be the 'same'. About a third (32%) believe this year's iteration is worse whilst 13% rate it 'better'.

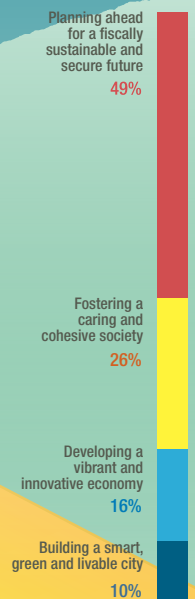
The Government also outlined its key priorities moving forward. Out of the four objectives, Singaporeans first and foremost believe that the country should plan ahead for a fiscally sustainable and secure future (49%). 26%, however, are of the opinion that Singapore should absolutely prioritise a caring and cohesive society.

Of all the policies and initiatives discussed, the Proximity Housing Grant for eligible singles buying resale flats to live near their parents was rated the most favourable (81%) and the scheduled GST hike was the most unfavourable (83%).

Should you be interested in obtaining more extensive data and/or other detailed breakdowns, please contact Yuling at [yuling@blackbox.com.sg](mailto:yuling@blackbox.com.sg).



### Government Priorities Moving Forward: Which is the Most Important?



### Top Three Most Favourable and Unfavourable Budget Announcements



Proximity Housing Grant for eligible singles buying resale flat near parents

81%



Proximity Housing Grant for families and eligible singles buying resale flat with parents to increase

79%



GST to rise to 9% sometime between 2021 and 2025

83%

GST to be introduced on imported digital services

71%

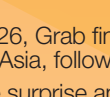
Increase of levy rate for foreign domestic workers

58%



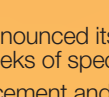
Annual Edusave contributions to increase

80%



Proximity Housing Grant for eligible singles buying resale flat near parents

81%



GST to rise to 9% sometime between 2021 and 2025

83%

GST to be introduced on imported digital services

71%

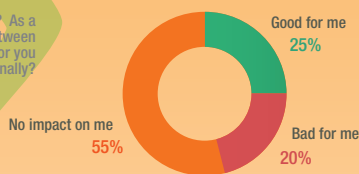
Increase of levy rate for foreign domestic workers

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## Grab: Southeast Asia's New Goliath



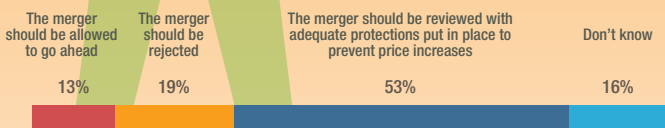
### Merger: Perceived Potential Impact on Consumers



Q. What is your reaction to this idea? As a consumer, do you think the merger between Grab and Uber will be good or bad for you personally?

Q. Do you think the merger should be allowed to go ahead or should be rejected by Government regulators...?

### Merger: Majority Vote Review or Reject



On March 26, Grab finally announced its acquisition of Uber's operations in Southeast Asia, following weeks of speculation.

Prior to the surprise announcement and the subsequent orders by the Competition and Consumer Commission of Singapore (CCCS) to stall the deal, Blackbox polled Singaporeans on their views of Grab's potential takeover and the possible impact on consumers.

More than a third of Singaporeans (35%) have truly embraced ride-sharing apps, booking rides on Grab or Uber at least once a week. Young working adults between the ages of 25 and 34 are particularly reliant on using these apps to get around (54% use the apps at least once a week).

Prior to the merger, Grab was the preferred player in the market with more than half (57%) of Singaporeans more inclined towards the Singapore-based brand. About one in five (22%) preferred Uber whilst 20% had no favourite.

Whilst three in five (59%) Singaporeans followed the speculation surrounding the merger, a majority (55%) believe that the acquisition will have no impact on consumers. Only one in five (20%) think that there will be a negative impact.

That is not to say that the merger should proceed unmonitored – nearly three in four (72%) feel that the merger should be rejected or reviewed in order to safeguard consumer interests and prevent price hikes.

## Government Satisfaction Index

Monthly  
Index

80 GSI

Monthly  
Trend

+1

### About the Results

Each month Blackbox conducts interviews with a representative sample of 1,000 Singaporeans.

We 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 [yuling@blackbox.com.sg](mailto:yuling@blackbox.com.sg) for assistance.

Government satisfaction increased by one point to 80 points in March. Overall sentiment across most areas improved or remained the same.

Three key areas fell: Care for the Elderly (-3), Health Insurance/Protection (-2) and Government Accountability (-1).

Year on year, the Government has seen community satisfaction dip most in the following areas: Public Transport (-8), Government Accountability (-6) and Taxes (-5).

| Rank   | Issue                                | Satisfaction with Government | Change since last month | Change over last 12 months |
|--|--------------------------------------|------------------------------|-------------------------|----------------------------|
| 1  | Defence/ national security           | 96                           | 0                       | 1                          |
| 2  | Crime levels                         | 96                           | 1                       | -1                         |
| 3  | Racial relations/ integration        | 93                           | 0                       | 0                          |
| 4  | The environment                      | 92                           | 0                       | -1                         |
| 5  | Education system                     | 90                           | 0                       | 0                          |
| 6  | Moral standards                      | 87                           | 1                       | 1                          |
| 7  | Management of the economy            | 86                           | 1                       | 1                          |
| 8  | Care for the Elderly                 | 86                           | -3                      | -2                         |
| 9  | Health insurance/protection          | 83                           | -2                      | -3                         |
| 10   | Jobs and unemployment                | 80                           | 0                       | 3                          |
| 11   | CPF/pensions                         | 78                           | 2                       | -2                         |
| 12   | Public transport                     | 77                           | 1                       | -8                         |
| 13   | Government accountability            | 76                           | -1                      | -6                         |
| 14   | Taxes                                | 76                           | 0                       | -5                         |
| 15   | Level of salaries and wages          | 76                           | 2                       | 2                          |
| 16   | Population management                | 74                           | 3                       | 2                          |
| 17   | Civil rights/ liberties/ free speech | 74                           | 1                       | -3                         |
| 18   | Housing affordability                | 71                           | 3                       | 1                          |
| 19   | Gap between rich and poor            | 67                           | 0                       | -2                         |
| 20   | Motor vehicle prices/ COE            | 64                           | 3                       | 4                          |
| 21   | Cost of living                       | 63                           | 5                       | 3                          |
| <b>Overall Government Satisfaction Index</b> |                                      | <b>80</b>                    | <b>1</b>                | <b>-1</b>                  |

## Who We Are

Blackbox Research is an award-winning Singapore based agency specialising in communications insights. We provide advanced research, analytics and digital intelligence services for both public sector and commercial clients. Our team has expertise covering market research, strategic communications and messaging, advertising and public policy.

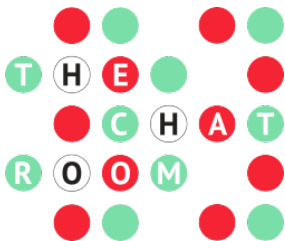
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Blackbox Research introduces Singapore's first inspiration laboratory – the Chat Room. Primarily designed for focus group discussions, The Chat Room is a creative space that brings people together. The inviting and relaxed atmosphere allows companies and brands to connect with consumers in meaningful conversations. For more information, visit [thechatroom.com.sg](http://thechatroom.com.sg)