

PAHAYAG QUARTER 4 NATIONAL SURVEY

Executive Summary

13 December 2021

PAHAYAG QUARTER 4 (PHYG-Q4) is an independent and non-commissioned poll conducted by PUBLICUS Asia Inc. The survey period of PHYG-Q4 ran from December 6 to December 10, 2021.

PHYG-Q4 is a nationwide purposive sampling survey comprised of 1,500 respondents that were randomly drawn from a market research panel by the Singapore office of PureSpectrum, a US-based firm. The sampling was guided by statistics generated from official COMELEC data.

PHYG-Q4 is made up of six (6) modules: 1) *State of the Economy and Economic Prospects*, 2) *National Issues*, 3) *Scorecard for National Leaders and Institutions*, 4) *Emotional Quotient of Incumbent Leaders*, 5) *Media Consumption Habits*, and 6) *Election Preferences*.

I. STATE OF THE ECONOMY AND ECONOMIC PROSPECTS

- Table 1 shows that close to 75% of respondents indicated that they expect their prospects to improve in the coming year. A similar proportion of respondents indicated that they expect the economy to improve in the first quarter of 2022. These are significant improvements from PHYG-Q3 levels. These can be attributed to a combination of the following: (1) the easing of COVID-related restrictions, (2) the increase in economic activity, and (3) the seasonal optimism brought about by the onset of the Christmas season.

LEVELS	TOTAL	NCR	NCL	SL	VIS	MIN
WORSEN BY A LOT	0.9	1.7	0.6	1.2	0.6	0.9
WORSEN BY A LITTLE	3.5	1.7	2.8	2.7	5.8	4.0
NEITHER WORSEN NOR IMPROVE	21.6	20.1	18.8	26.6	23.6	18.3
IMPROVE BY A LITTLE	44.3	47.7	45.5	40.5	46.0	43.4
IMPROVE BY A LOT	29.7	28.7	32.3	29.0	24.0	33.4

Table 1. State of the Economy and Economic Prospects

II. NATIONAL ISSUES

- On Table 2, THE 3-DAY VACCINATION DRIVE, THE DEPLOYMENT OF MALASAKIT CENTERS, THE GRANTING OF VAT EXEMPTIONS TO SENIORS, and INCREASING PHILIPPINE NAVAL PRESENCE IN AYUNGIN SHOAL garnered total approval levels exceeding 70% and notched single digit total disapproval levels. Around 47% of respondents disapproved of the FILING OF DISQUALIFICATION CASES against former senator and presidential candidate Ferdinand Bongbong Marcos Jr. In contrast, only a quarter approved of these cases.

NAME	STRONGLY DISAPPROVE	DISAPPROVE	NEITHER	APPROVE	STRONGLY APPROVE	TOTAL APPROVAL	TOTAL DISAPPROVAL
CONDUCT OF 3-DAY VAX DRIVE	2.33	3.13	15.00	37.93	41.60	79.53	5.46
DEPLOYMENT OF MALASAKIT CENTERS	2.67	3.33	15.53	35.33	43.13	78.46	6.00
GRANTING VAT EXEMPTIONS TO SENIORS	4.13	4.47	13.87	35.80	41.73	77.53	8.60
INCREASING NAVAL PRESENCE IN AYUNGIN	2.07	1.87	22.33	34.07	39.67	73.74	3.94
IMPOSING STRICTER QUARANTINE PROTOCOLS DUE TO OMICRON	4.53	8.60	19.27	42.20	25.40	67.60	13.13
REOPENING OF COLLEGES FOR F2F CLASSES	5.40	11.60	20.73	41.93	20.33	62.26	17.00
CONTINUATION OF NTF-ELCAC	5.60	5.33	30.07	33.80	25.20	59.00	10.93
ALLOWING THE OPERATION OF A NUCLEAR POWER PLANT	9.20	11.27	26.00	26.73	26.80	53.53	20.47
WITHDRAWAL OF CANDIDACY OF SEN GO	4.80	6.60	36.13	27.67	24.80	52.47	11.40
DOWNGRADING OF COVID ALERT LEVEL IN NCR	6.40	14.07	27.73	42.07	9.73	51.80	20.47
REOPENING OF ELEMENTARY AND HS FOR F2F CLASSES	10.07	20.33	25.47	32.60	11.53	44.13	30.40
FILING OF DQ CASES AGAINST FORMER SEN MARCOS	30.40	16.47	27.93	10.53	14.67	25.20	46.87

Table 2. National Issues

- On Table 2, the share of respondents that indicated that the country is headed in the right direction increased slightly from ~63% in PHYG-Q3 to ~68% in PHYG-Q4. The share of respondents that indicated that the country is headed in the wrong direction decreased by around the same magnitude.

LEVELS	TOTAL	NCR	NCL	SL	VIS	MIN
DEFINITELY HEADED IN THE WRONG DIRECTION	4.0	7.5	4.0	4.7	4.8	0.9
MAYBE HEADED IN THE WRONG DIRECTION	7.1	10.9	9.2	8.3	5.8	3.4
NOT SURE	21.5	15.5	25.2	24.9	23.0	16.3
MAYBE HEADED IN THE RIGHT DIRECTION	33.5	37.4	33.8	32.0	32.9	33.1
DEFINITELY HEADED IN THE RIGHT DIRECTION	33.9	28.7	27.7	30.2	33.5	46.3

Table 3. Country Direction per Area

- According to respondents, the most pressing issues that the president must focus on during the remainder of his term are: THE ECONOMY and JOBS (see Table 4). The choice share of THE COVID VACCINE dropped sharply from 47% in PHYG-Q3 to ~24% in PHYG-Q4.

LEVELS	RANK 1	RANK 2	RANK 3	TOTAL
THE PHILIPPINE ECONOMY	35.9	17.5	13.0	66.4
JOB	12.7	23.5	16.1	52.3
EDUCATION	5.5	10.9	10.5	26.9
COVID VACCINE	9.8	6.5	7.6	23.9
CORRUPTION	8.7	7.3	6.5	22.5
POVERTY	7.7	7.7	6.5	21.9
PEACE AND ORDER CRIME	3.5	5.1	6.5	15.1
WAGES	3.1	4.3	5.6	13.0
PRICES INFLATION	3.1	5.1	4.3	12.5
UTILITIES WATER AND ELECTRICITY	1.6	2.4	4.7	8.7
ENVIRONMENT	1.6	1.9	3.1	6.6
ILLEGAL DRUGS	1.5	1.9	3.1	6.5
CLEAN AND TRUSTWORTHY ELECTIONS IN 2022	2.3	1.1	2.0	5.4
TERRORISM	0.7	0.8	2.9	4.4
CONSTITUTIONAL REFORM	0.9	1.1	1.5	3.5
TAX REFORM	0.7	1.0	1.2	2.9
INTERNATIONAL RELATIONS WITH CHINA	0.3	0.5	1.9	2.7

Table 4. Issues to Focus On by the President

- Table 5 shows that GETTING SICK WITH COVID (47%) remains a popular household-level concern among respondents. It is of note, however, that its overall rate decreased from 63% in PHYG-Q3 and is now more in line with other concerns such as NOT BEING ABLE TO AFFORD BASIC NEEDS (~44%), GETTING SICK WITH A DISEASE APART FROM COVID (~41%), and DIFFICULTY FINDING EMPLOYMENT (~41%).

	RANK 1	RANK 2	RANK 3	TOTAL
GETTING SICK WITH COVID	27.1	12.3	7.8	47.2
NOT BEING ABLE TO AFFORD BASIC NEEDS	11.5	16.6	16.3	44.4
GETTING SICK WITH A SERIOUS DISEASE APART FROM COVID	16.8	16.0	8.6	41.4
DIFFICULTY IN FINDING EMPLOYMENT	15.1	15.9	10.3	41.3
LOSING A JOB	9.9	13.7	11.3	34.9
NOT BEING ABLE TO MOVE AROUND BECAUSE OF COVID RELATED RESTRICTIONS	6.1	8.7	18.3	33.1
NOT GETTING ENOUGH PAY	8.6	9.7	8.9	27.2
BEING THE VICTIMS OF A CRIME	3.1	4.3	12.0	19.4
NOT BEING ABLE TO AFFORD WANTS	0.9	2.5	5.9	9.3

Table 5. Biggest Household-Level Concern

III. SCORECARD FOR NATIONAL LEADERS AND INSTITUTIONS

- The approval rating of PRESIDENT DUTERTE rose in the fourth quarter (see Table 6). It is presently back to its PHYG-Q1 level (~65%) after dipping in PHYG-Q2 (~58%). The approval (~30%) and disapproval (~42%) ratings of VICE PRESIDENT ROBREDO remained steady in PHYG-Q4. The same can be said about the ratings of SENATE PRESIDENT SOTTO albeit with more quarter-to-quarter variability.

TOTAL APPROVAL OVER TIME

NAME	Q1	Q2	Q3	Q4
PRESIDENT RODRIGO R. DUTERTE	64.866	57.934	59.800	64.867
SENATE PRESIDENT VICENTE "TITO" SOTTO III	40.934	38.134	33.933	36.333
VICE-PRESIDENT MARIA LEONOR "LENI" G. ROBREDO	29.134	32.267	31.333	30.267
CHIEF JUSTICE ALEXANDER GESMUNDO	28.466*	26.000	24.200	24.334
HOUSE SPEAKER LORD ALLAN VELASCO	25.400	24.266	23.867	23.534

Table 6. National Leaders Approval Rating Over Time

Note that the comparisons are only applicable for PHYG-Q1 to Q4. This is because their sampling parameters, questionnaire lengths, and field work windows are comparable. The PAHAYAG: FINAL LIST was a markedly shorter survey with a much narrower field work window in order to capture the immediate effects of the last day of substitution. While comparisons can be made with reference to PHYG-FL, it is important to acknowledge the caveats that result from the aforementioned differences.

- In Table 7, AFP, TESDA, and PAF again notched the highest total approval levels. These agencies alongside the BSP and DSWD registered total approval levels exceeding the 60% mark – with the AFP at ~70%.
- The AFP, TESDA, PAF and BSP appear to be the most trusted agencies in PHYG-Q4. It is worth mentioning that the AFP is the only agency with a total high trust rating above the 50% mark (see Table 8).

TOTAL APPROVAL OVER TIME

NAME	Q1	Q2	Q3	Q4
AFP	60.1	67.2	66.7	69.7
TESDA	62.1	65.4	62.7	67.7
PAF	NA	NA	58.2	64.5
DSWD	57.1	55.8	57.5	61.3
DPWH	49.5	53.1	56.1	59.3
DOST	56.3	60.9	58.0	58.9
CHED	NA	54.3	56.7	58.5
PNP	36.9	45.6	53.9	54.9
DOLE	47.6	49.4	52.1	54.9
DTI	48.8	49.8	51.5	53.7
DOTR	45.5	51.7	50.9	53.3
DFA	46.6	50.5	51.8	53.1
SC	46.5	49.9	50.8	52.9

Table 7. Institutions Approval Rating Over Time

TOTAL HIGH TRUST OVER TIME

NAME	Q1	Q2	Q3	Q4
AFP	43.9	49.7	49.1	52.6
TESDA	42.6	45.2	42.7	46.1
PAF	NA	NA	41.0	45.7
DEPED	33.9	33.1	36.5	40.7
CHED	NA	36.3	39.0	39.9
DOST	35.5	39.6	36.0	38.5
DSWD	34.5	34.3	34.4	37.9
PNP	23.8	29.6	35.2	36.5
DPWH	29.7	33.4	35.1	36.0
DOLE	30.9	32.5	33.0	34.7
SC	31.6	32.7	32.3	33.7
DFA	27.7	33.0	32.2	32.7
DOJ	24.7	30.3	30.1	30.7

Table 8. Institutions Trust Rating Over Time

- Table 9 shows that the total high trust rating of PRESIDENT DUTERTE (~55%) appears to have recovered from the dip observed in PHYG-Q2 (~50%). It is now in line with his rating in PHYG-Q1. The total high trust rating of VICE PRESIDENT ROBREDO (~23%) is in line with her three quarter average.

TOTAL HIGH TRUST OVER TIME

NAME	Q1	Q2	Q3	Q4
PRESIDENT RODRIGO R. DUTERTE	55.133	50.400	52.933	54.533
VICE-PRESIDENT MARIA LEONOR "LENI" G. ROBREDO	18.667	23.533	22.066	23.467
SENATE PRESIDENT VICENTE "TITO" SOTTO III	24.600	22.800	19.800	20.800
CHIEF JUSTICE ALEXANDER GESMUNDO	15.000*	14.934	14.600	13.534
HOUSE SPEAKER LORD ALLAN VELASCO	14.533	13.934	12.067	12.600

Table 9. National Leaders Trust Rating Over Time

IV. EMOTIONAL QUOTIENT OF INCUMBENT LEADERS

- PRESIDENT DUTERTE was tagged by at least 50% of respondents in all but one of the traits (RELIGIOSITY). He notched the highest share for BRAVERY (~80%), LOVE FOR THE PHILIPPINES (~72%), DECISIVENESS (~72%), and CONCERN FOR FILIPINOS (~71%).

RODRIGO R. DUTERTE	YES	MARIA LEONOR "LENI" G. ROBREDO	YES	VICENTE "TITO" SOTTO III	YES
BRAVE	80.47	RELIGIOUS	42.60	ELOQUENT	29.67
LOVE FOR THE PHILIPPINES	72.40	SYMPATHETIC / KIND	41.93	SYMPATHETIC / KIND	27.47
DECISIVE	71.87	HUMBLE	38.00	RESPONSIBLE	27.20
CONCERN FOR FILIPINOS	70.53	APPROACHABLE	37.80	UPHOLDS THE LAW	26.87
RESPONSIBLE	68.47	CONCERN FOR FILIPINOS	37.33	HUMBLE	25.87
PRO POOR	65.40	DOES NOT ABUSE AUTHORITY	36.47	RELIGIOUS	25.73
SINCERE / AUTHENTIC	64.80	PRO POOR	34.87	LOVE FOR THE PHILIPPINES	25.53
UPHOLDS THE LAW	64.73	LOVE FOR THE PHILIPPINES	34.60	DOES NOT ABUSE AUTHORITY	25.47
SELFLESS	62.80	SELFLESS	33.93	CONCERN FOR FILIPINOS	25.20
ELOQUENT	59.93	UPHOLDS THE LAW	33.40	APPROACHABLE	24.87
APPROACHABLE	59.07	RESPONSIBLE	33.27	FAIR MINDED	24.80
FAIR MINDED	58.53	SINCERE / AUTHENTIC	31.73	SINCERE / AUTHENTIC	21.73
SYMPATHETIC / KIND	55.60	FAIR MINDED	31.20	PRO POOR	21.27
HUMBLE	54.87	ELOQUENT	29.67	BRAVE	19.60
DOES NOT ABUSE AUTHORITY	54.67	BRAVE	25.20	SELFLESS	18.80
RELIGIOUS	39.00	DECISIVE	23.80	DECISIVE	18.53

Table 10. Emotional Quotient of Incumbent Leaders

V. MEDIA CONSUMPTION HABITS

- On Table 11, SOCIAL MEDIA remains by far the most popular platform for news for respondents with a high usage rate (at least four times a week) of 72%. TELEVISION NEWS is a distant second at ~55%. RADIO NEWS and PRINT NEWS are far behind with high usage rates hovering around ~29%.

ACTION	NEVER	ONCE EVERY FEW WEEKS	ONCE A WEEK	TWO TO THREE TIMES A WEEK	FOUR TO SIX TIMES A WEEK	EVERY DAY	HIGH	LOW
READ NEWS ON SOCIAL MEDIA	1.867	6.733	7.400	11.867	11.933	60.200	72.133	8.600
WATCH NEWS ON TV	4.200	15.533	9.333	16.200	8.067	46.667	54.734	19.733
LISTEN TO NEWS ON THE RADIO	17.067	23.000	13.667	16.800	8.733	20.733	29.466	40.067
READ NEWS ON PRINT	18.200	21.867	15.600	15.333	9.133	19.867	29.000	40.067

Table 11. Media Platform Usage Rate

- CNN, GMA7, and PDI again secured the top three spots in terms of total high trust (see Table 12). It is of note, however, that most media outfits (including the aforementioned three) registered decreases in their total high trust ratings and/or increases in their total low trust ratings.

NAME	NOT AWARE OR DOES NOT KNOW ENOUGH TO RATE	NO TRUST	LOW TRUST	MODERATE TRUST	HIGH TRUST	VERY HIGH TRUST	TOTAL HIGH	TOTAL LOW
CNN PHILIPPINES	1.800	4.933	8.267	36.200	31.733	17.067	48.800	13.200
GMA 7	1.067	4.000	9.800	37.800	29.933	17.400	47.333	13.800
DAILY INQUIRER	2.400	7.133	10.000	39.600	27.867	13.000	40.867	17.133
MANILA BULLETIN	2.667	4.600	9.533	44.933	27.467	10.800	38.267	14.133
PHILIPPINE STAR	2.467	5.600	10.933	45.067	25.933	10.000	35.933	16.533
MANILA TIMES	3.000	4.800	10.600	48.067	24.933	8.600	33.533	15.400
TV5 / INTERAKSYON	2.067	4.933	10.600	49.733	25.400	7.267	32.667	15.533
ABSCBN (ONLINE)	0.667	20.133	18.067	30.733	17.400	13.000	30.400	38.200
MANILA STANDARD	6.067	4.800	11.200	49.000	22.067	6.867	28.934	16.000
BUSINESSWORLD	11.333	4.267	9.000	48.867	19.800	6.733	26.533	13.267
SUNSTAR	9.600	5.333	11.800	47.400	19.600	6.267	25.867	17.133
BUSINESSMIRROR	12.867	4.933	9.933	48.333	18.867	5.067	23.934	14.866
RAPPLER	4.333	26.333	16.067	32.200	13.267	7.800	21.067	42.400
EAGLE NEWS	19.600	7.267	13.467	42.533	11.533	5.600	17.133	20.734
ABANTE	9.533	8.800	19.800	45.400	12.733	3.733	16.466	28.600
SUMMIT	17.133	6.133	12.867	47.467	12.400	4.000	16.400	19.000
SMNI	19.733	8.200	14.133	41.933	10.067	5.933	16.000	22.333
POLITIKO ONLINE	19.400	8.600	17.133	43.067	8.867	2.933	11.800	25.733

Table 12. Media Trust Ratings

VI. ELECTION PREFERENCES

- Table 13 shows that over half of respondents (~52%) tagged BONGBONG MARCOS as their preferred choice for president. His choice share increased by 2.6% from his 49.3% in PHYG-Q3. LENI ROBREDO is holding steady from quarter to quarter at around 20% to 21%. ISKO DOMAGOSO dipped from 9% in PHYG-Q3 to ~8% in PHYG-Q4.

LEVELS	PQ3	PQ4
MARCOS, FERDINAND BONGBONG JR	49.3	51.9
ROBREDO MARIA LEONOR LENI	21.3	20.2
UNDECIDED	8.6	8.3
DOMAGOSO, FRANCISCO ISKO MORENO	8.8	7.9
GO, CHRISTOPHER BONG	NA	3.9
LACSON, PANFILO PING	2.9	3.4
PACQUIAO, EMMANUEL MANNY	2.8	2.3
NONE	1.7	0.9
ABELLA, ERNESTO ERNIE	0.6	0.5

Table 13. Preference for President PQ3-Q4

- Close to 55% of respondents tagged SARA DUTERTE-CARPIO as their preferred choice for vice president. Her entry into the vice presidential race broke the three-way tie for first place observed in PHYG-Q3 (see Table 14).

LEVELS	TOTAL	NCR	NCL	SL	VIS	MIN
DUTERTE-CARPIO, SARA "INDAY SARA"	54.8	33.9	52.0	39.9	58.8	78.6
ONG, WILLIE DOC WILLIE	11.2	13.8	12.0	17.2	8.9	5.4
SOTTO, VICENTE TITO III	11.0	17.2	14.8	13.3	9.3	3.7
PANGILINAN, FRANCIS KIKO	9.7	18.4	7.4	13.3	10.2	3.4
UNDECIDED	9.5	11.5	9.5	11.5	10.2	6.0
ATIENZA, JOSE LITO	1.5	1.7	1.5	1.5	1.3	1.7
NONE	1.5	1.7	2.2	2.7	0.6	0.6
BELLO, WALDEN	0.7	1.7	0.6	0.3	0.6	0.6
OTHERS PLEASE INDICATE	0.1	0.0	0.0	0.3	0.0	0.0

Table 14. Preference for Vice President

- Table 15 shows that CHIZ ESCUDERO (~57%), RODRIGO DUTERTE (~56%), ALAN PETER CAYETANO (~45%), RAFFY TULFO (~42%), and WIN GATCHALIAN (~42%) secured the top five spots of the PHYG-Q4 senatorial poll. The entry of president DUTERTE has made the race even more crowded. Other late entries that appear to have altered the race dynamics include GUILLERMO ELEAZAR (~26%) and HARRY ROQUE (~24%).

	CANDIDATE	VOTE
1	ESCUDERO, FRANCIS "CHIZ"	56.73
2	DUTERTE, RODRIGO "DIGONG"	55.53
3	CAYETANO, ALAN PETER	45.27
4	TULFO, RAFAEL "IDOL RAFFY"	41.67
5	GATCHALIAN, SHERWIN "WIN"	41.60
6	LEGARDA, LOREN	37.80
7	ZUBIRI, JUAN MIGUEL "MIGZ"	37.40
8	VILLAR, MARK	35.27
9	VILLANUEVA, JOEL "TESDAMAN"	33.27
10	HONTIVEROS, ANA THERESIA "RISA"	32.53
11	GORDON, RICHARD "DICK"	26.67
12	ELEAZAR, GUILLERMO LORENZO	25.87
13	DIOKNO, CHEL	25.47
14	PADILLA, ROBIN	25.07
15	BAUTISTA, HERBERT "BISTEK"	24.53
16	ROQUE, HERMINIO "HARRY"	24.33
17	BINAY, JEJOMAR "JOJO"	23.87
18	GADON, LORENZO "LARRY"	23.00
19	TEODORO, GILBERT "GIBO"	23.00
20	HONASAN, GREGORIO "GRINGO" II	20.13

Table 15. Preference for Senators

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