

Reactions to a Pandemic in a Connected World

COVID-19 Consumer Insights: India – Part 2

Based on platform insights from Jan 1 to Mar 23 and
survey responses held between March 19–22

Powered by

inMOBI Audience Intelligence | Pulse

About this Report

The following report is based on a detailed analysis of data received from a survey conducted on the InMobi Pulse platform combined with the data available with the InMobi Audience Intelligence platform that powers our segmentation and targeting for marketers and advertisers across the globe. The analysis explores the sentiments of the average Indian in these unique times, their reaction to COVID-19 and identifies the change in their behavior, both offline and online. This is Part-2 of a series of reports on the current COVID-19 situation. Part-3 will focus on the change in consumer behavior after a week of the nationwide lockdown announced by the Prime Minister of India.

SURVEY RESPONSES

- The survey was conducted on InMobi Pulse – a mobile market research platform, between March 19–22 with a sample size of 1874 smartphone users.

PLATFORM INSIGHTS

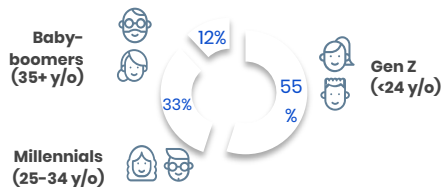
- This survey responses are combined with analysis of aggregated data signals received from the InMobi Audience Intelligence platform from the first week of January to the 23rd of March.
- The analysis also unravels location trends across the country through data signals from places of interest or polygons (created by InMobi for over 66,000 locations across India).

Profile of Survey Respondents

The survey was conducted on the InMobi Pulse platform and a total of 1874 unique and valid responses were collected. The following is the demographic profile of the respondents.



GENDER & AGE



CITY



MARITAL STATUS & FAMILY STRUCTURE



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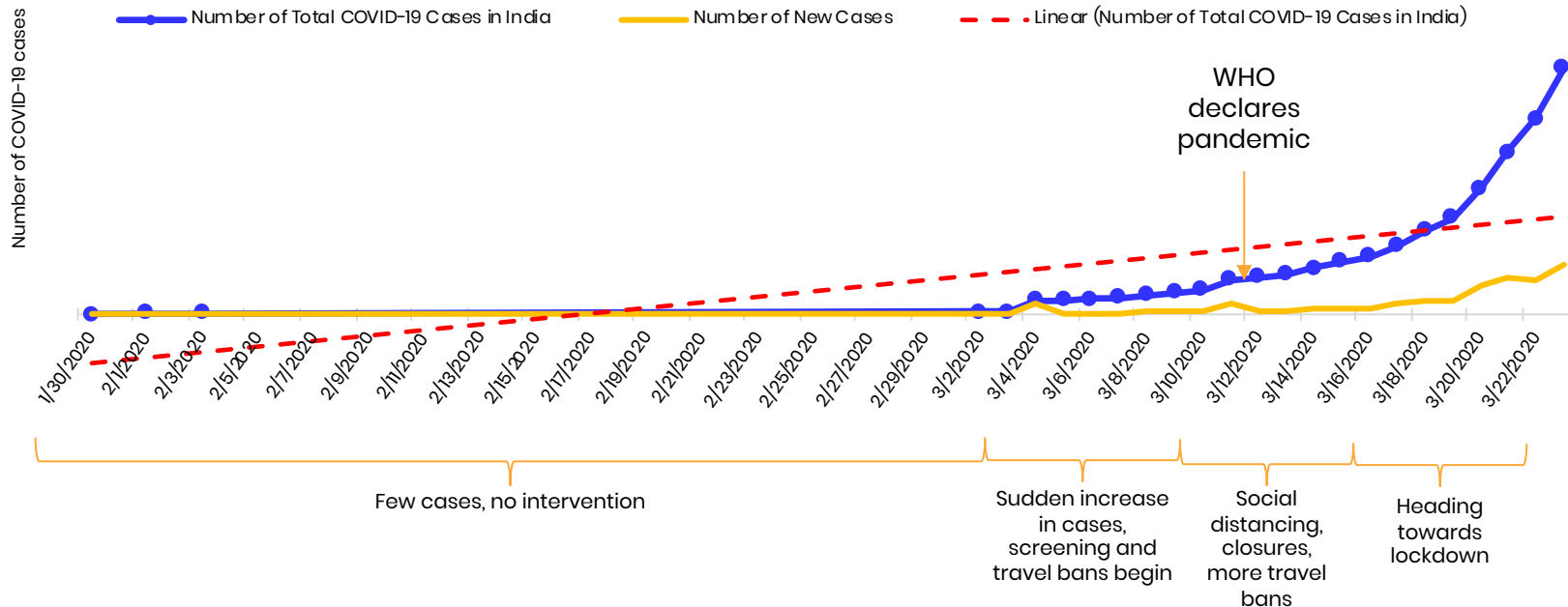
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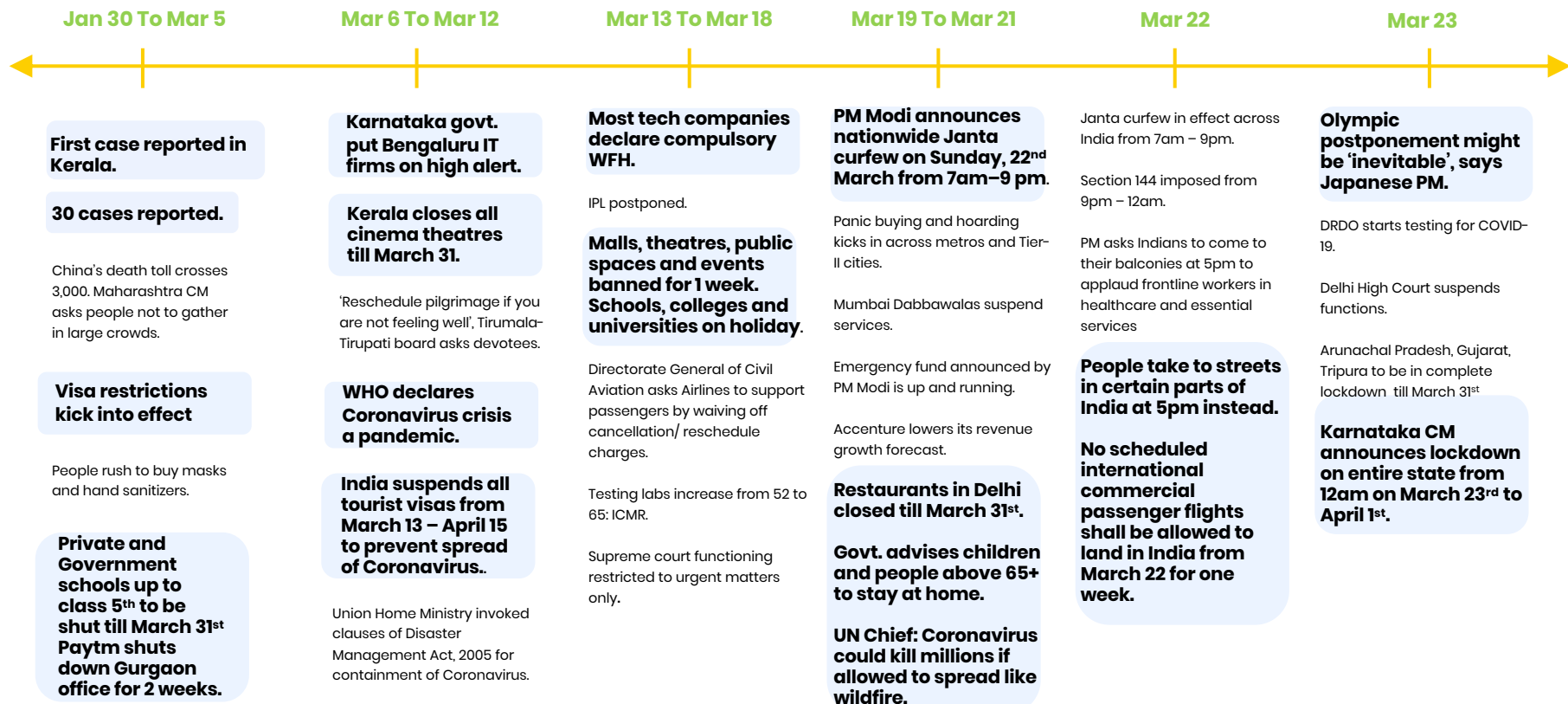


The COVID-19 Impact in India

Since Coronavirus first came to the world's notice in late last year, it has spread to at least 147 countries.



Key Events in the Timeline of COVID-19 in India¹



The Consumer Sentiment in India



The Consumer Sentiment: Awareness. Understanding. Expectation.

Inundated with information, Indians do not have the correct facts about COVID-19, neither do they have a positive outlook about the near future

60%

Misinformation abounds among citizens

60% of the respondents are unsure of the origins of Coronavirus. 40% think it is a biomedical experiment gone wrong or bio-war between US and China.

43%

The World Economy is in deep trouble

43% consumers believe all leading economies including India will be affected, while 30% believe that the world is heading for recession.

54%

Social Distancing for a majority

Only 54% of citizens are taking social distancing seriously and avoiding public gathering and human contact.

11%

Poor understanding of symptoms

Only 11% of the respondents were able to correctly identify two of the key symptoms associated with COVID-19 - 'Cough and cold with shortness of breath' and 'High fever with body pain.'

52%

Expect losses in their industry

Half of the consumers expect losses in their industry, with 15% expecting layoffs.

What do Indians know about COVID-19?

Even though the world is grappling with Coronavirus, there is limited understanding of cause and effect

6 in 10 Unsure of the origin of coronavirus
5 in 10 Believe mortality rate will be >6%
6 in 10 Anticipate this to last for > a month



4 in 10

think wet markets of
Wuhan or bat soup
consumption are
responsible

5 in 10

Believe that the
COVID mortality
rate will be 0-5%

(Mortality rate in India
as of March 23: **1.8%**)

4 in 10

think the situation will
ease out in one
month



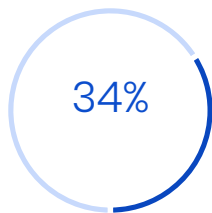
Source of virus

Mortality rate

Expiration

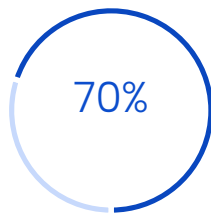
What are Indians doing to stay healthy and safe?

The lack of understanding of preventive measures and social distancing is a major concern



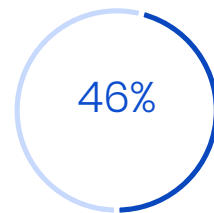
**Very satisfied with
Government measures**

Only 1 in 3 citizens were very satisfied with the measures taken by the Government towards Corona-Virus prevention and treatment



**CANNOT identify all
Preventive measures**

Only 3 in 10 citizens listed all four preventive measures as listed by WHO guidelines - avoiding public gathering, regular handwashing, sanitization, covering mouth while coughing & avoiding undercooked meat as preventive measures.

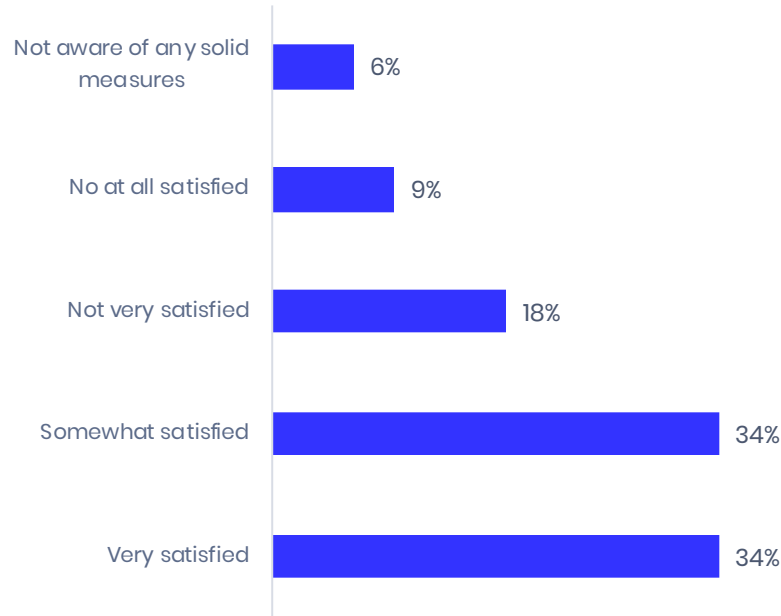
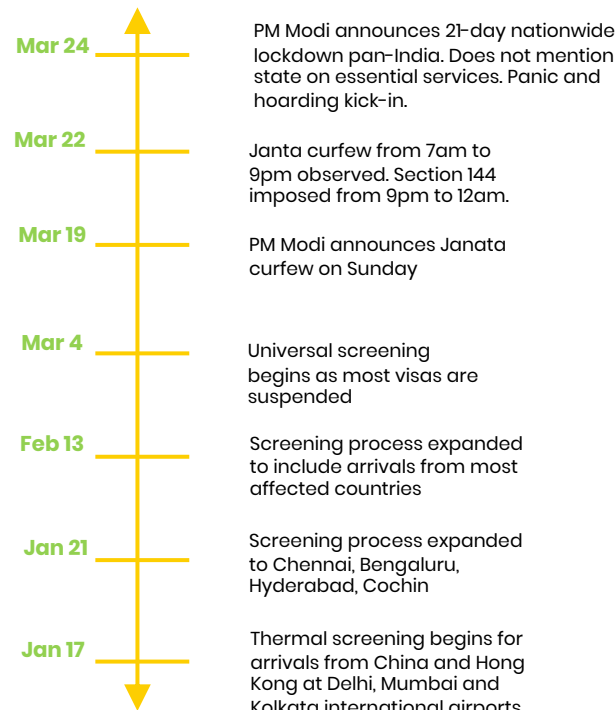


**NOT Practicing strict
Social-Distancing**

Almost half the nation is still not practicing social distancing. However, 6 in 10 respondents who are married or those staying with family are more likely to follow social distancing

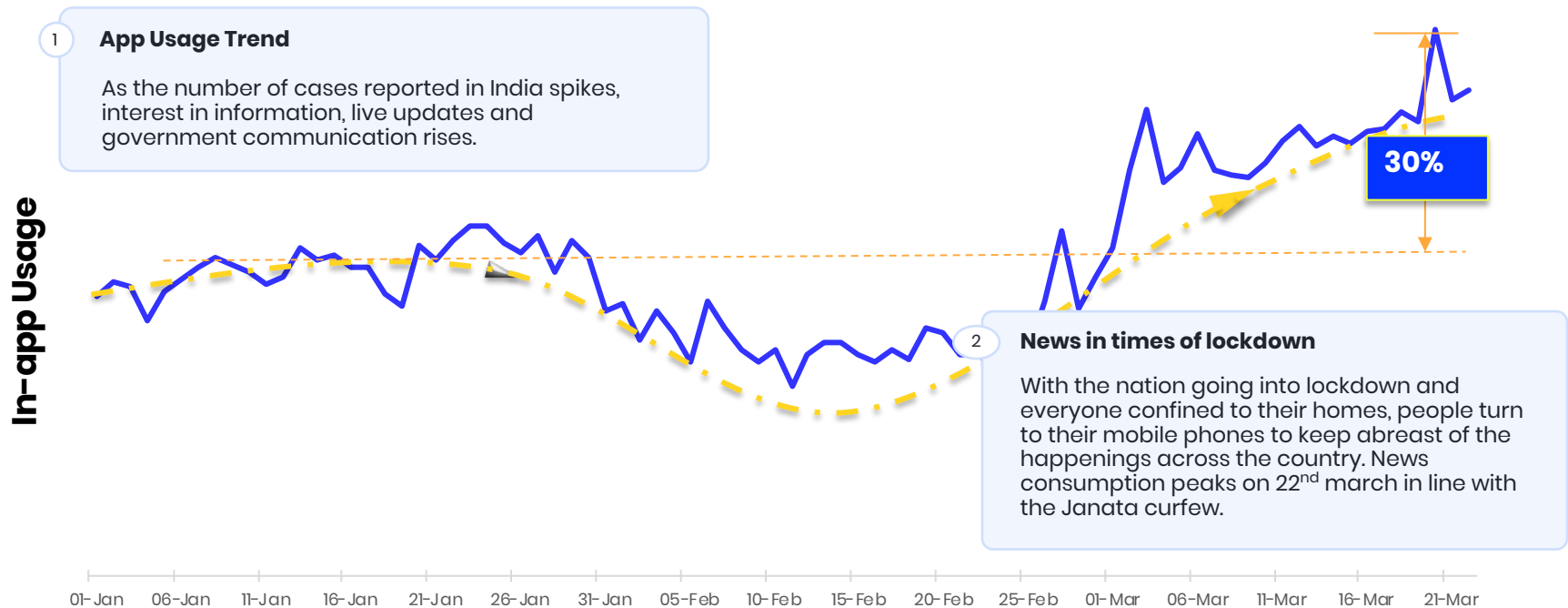
How satisfied are consumers with Government measures?

Only 1 in 3 Indians are very satisfied with the measures taken by the government to prevent and treat COVID-19



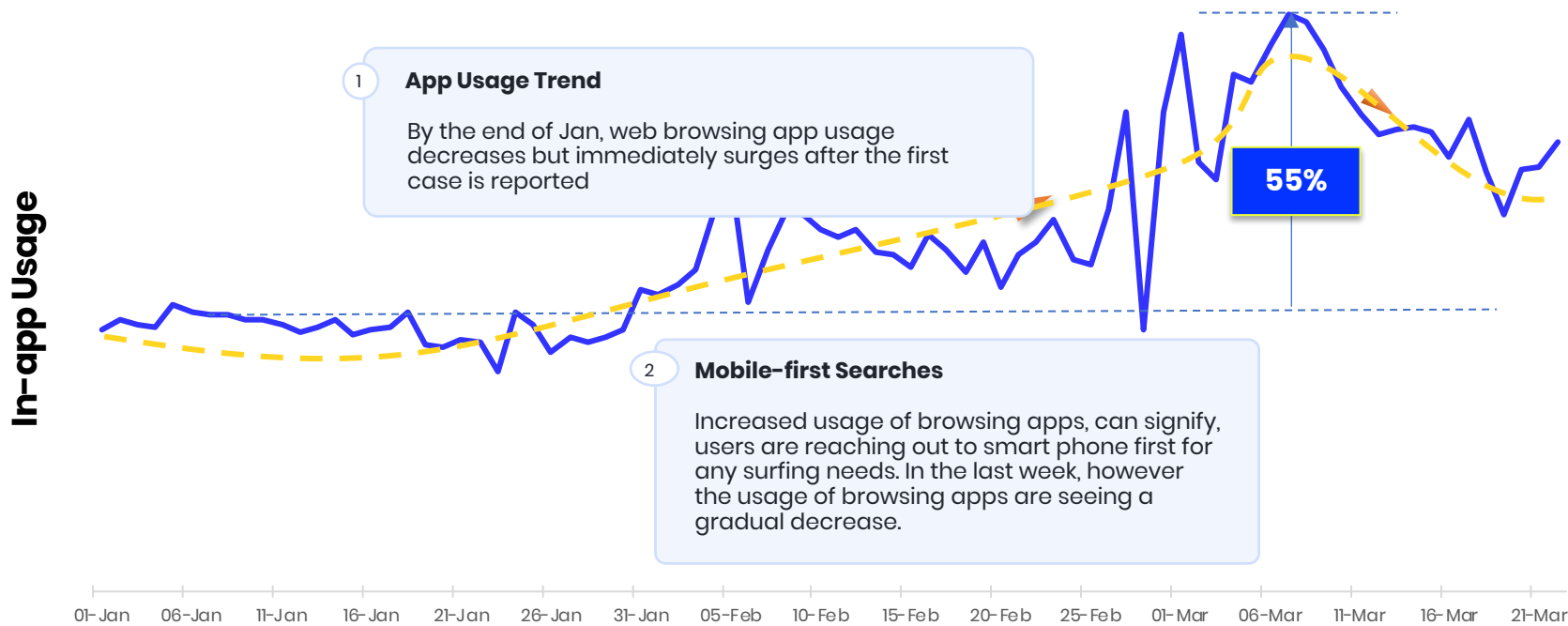
News apps are the biggest source of information

Since Feb 5, there has been a gradual decrease in the usage of News apps and suddenly spikes after 5th March as more cases are reported.



Web browsing apps rise in popularity for research

Since 12th March, there has been a steep increase in the usage of Books and Comic apps.



Challenges due to the COVID-19 Pandemic

Challenges in the time of COVID-19: Essentials. Lifestyle. Spends.

Considering restrictions placed across India, not only on human movement but on commercial establishments, Indians are facing unprecedented challenges



Schools shutdown, no WFH

27% of the consumers are facing situations where schools are shut down, but they are unable to work from home. With most non-essential services unavailable, Indians are struggling to manage it all



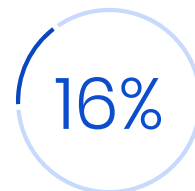
Scarcity of Sanitizers & handwash

4 in 10 respondents are facing difficulty in purchasing hand wash and sanitizers in times when maintaining hygiene is of most importance causing more anxiety.



Change in spending behavior

Half the consumers are increasing or decreasing spends on certain aspects of their regular lifestyle.



Scarcity of food essentials

16% of respondents are facing challenges in sourcing food essentials

The Shift in Consumer Behavior across the nation



The Changing Behavior: Preference. Shopping. Footfall.

Amidst lockdowns and restrictions on physical movement, Indians are quickly adapting to the new reality

54%

Maintaining strict social distancing

5 in 10 citizens are following social distancing but 46% of the citizens are still not heeding to government directive

40%

Hoarding up on essentials

4 in 10 respondents have bought enough groceries for a month or more.

70%

Quality over Price in times of crisis

7 in 10 consumers are choosing to buy cleaning products based on their germ-killing ability than based on price.

70%

Limited eating out/ordering in

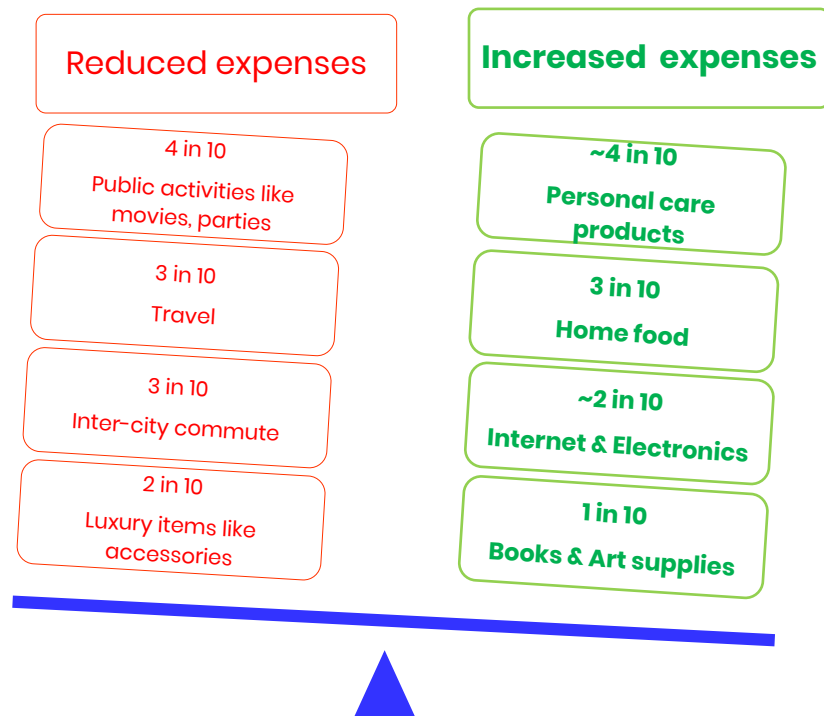
7 in 10 consumers have reduced or completely stopped eating out or ordering food at home. Cooking at home is on the rise.

11%

Placing orders online

1 in 10 consumers started ordering groceries online despite the long wait times.

How has shopping behavior changed?



Hoarding behavior has kicked in

- **40% have stocked up** on groceries for a month or more!
- **11%** have started ordering groceries online despite the long wait times and are willing to wait.

Quality is king in Personal care products

- **>70% Indians rate 'Germ killing ability'** as the most important factor followed by brand, leaving Price at third position.

Healthy food consumption on the rise

- **90%** have changed their food consumption habits.
- **70%** have stopped eating out/ordering in
- **62%** have started cooking at home
- **25%** are avoiding meat/trying more vegetarian options

Q17. Since the outbreak of Corona-Virus, how has your grocery / household essentials (like food, soaps, shampoos etc.) buying behavior changed?

Q19. These days what is your priority when it comes to buying personal care products like hand washing & bathing soaps?

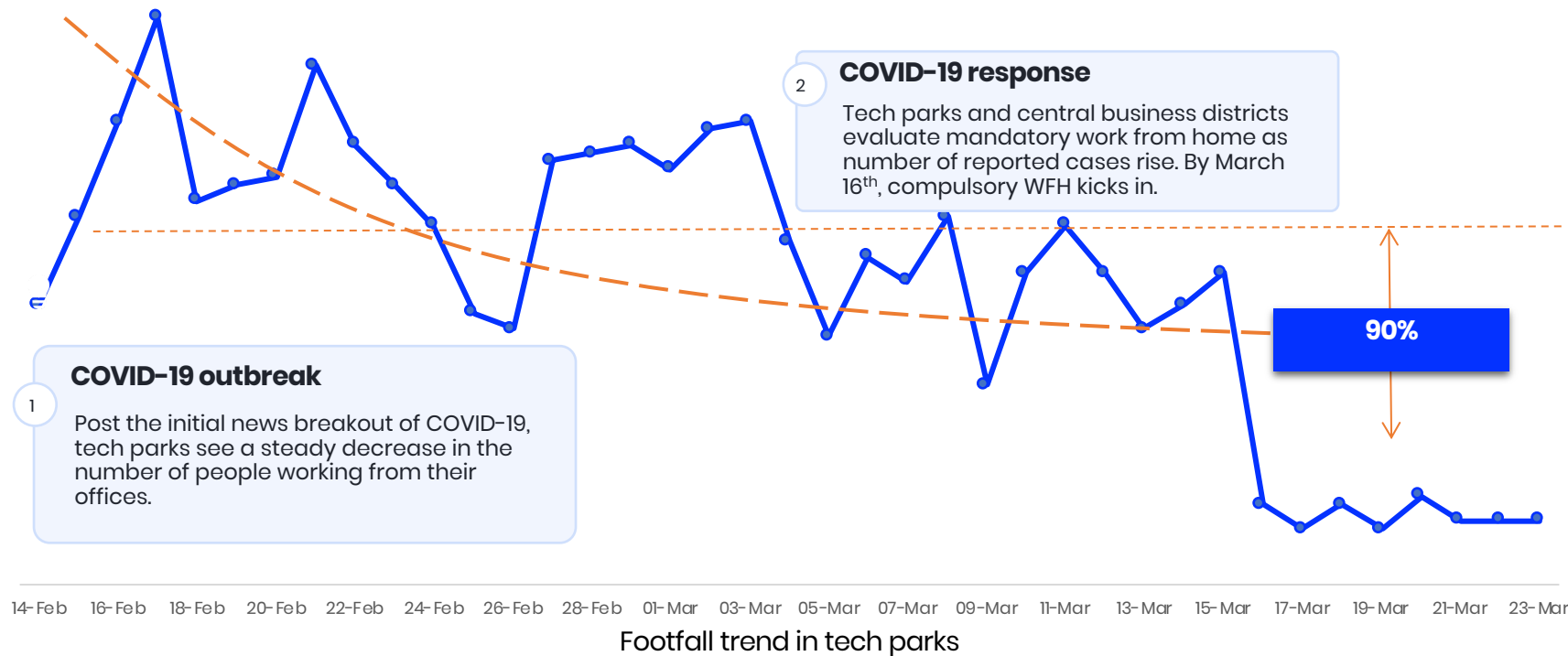
Q20. Post Corona outbreak, have your food consumption habits changed?

Q21. How has the corona-virus outbreak increased your budgeted expenditure?

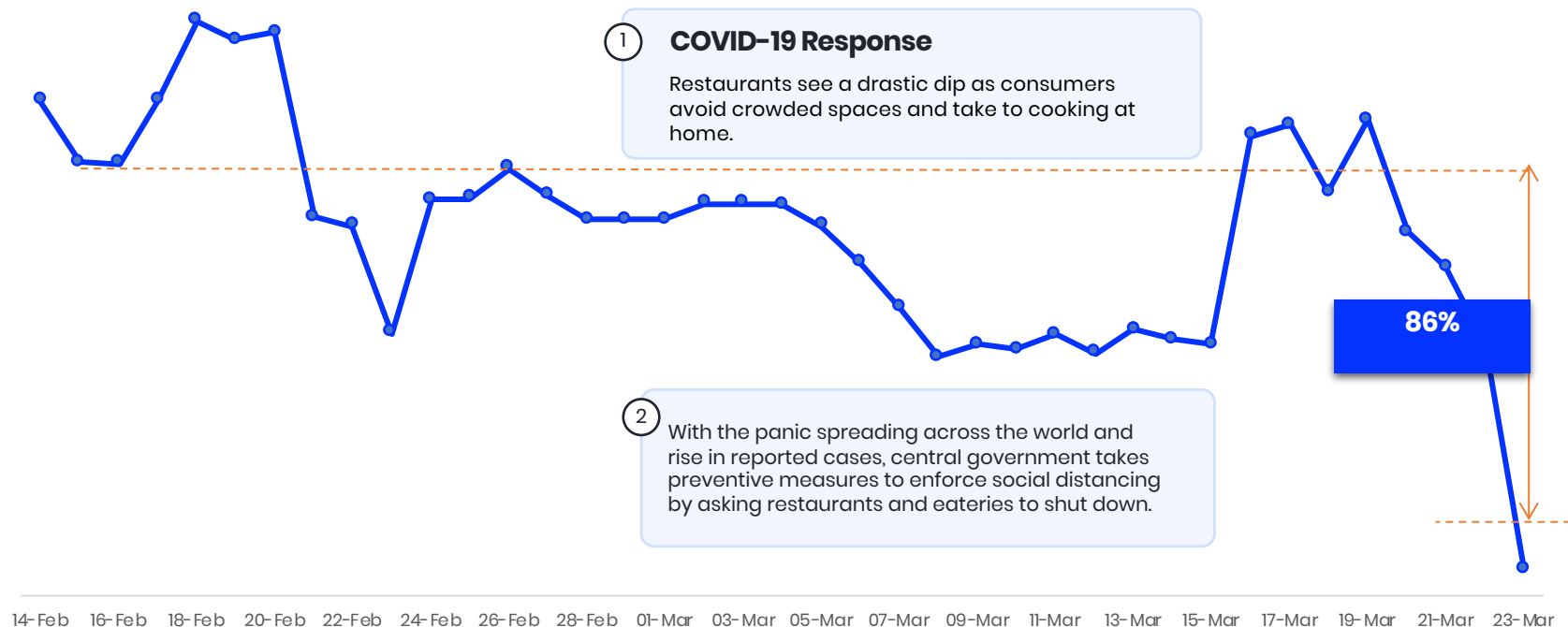
Q22. How has the corona-virus outbreak reduced your budgeted expenditure?

Total sample – 1874. Survey dates: March 19th – 22nd

Tech parks see a gradual decrease in footfall



Restaurants in metro cities see a steep decline



Footfall trend in restaurants

Supermarkets and Grocery Stores shoot up in Tier II Cities

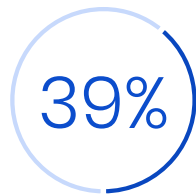


A top-down view of a person's hands resting on a laptop keyboard. The laptop screen displays a cityscape. To the right of the laptop, a smartphone is visible, showing a close-up of a mechanical part. The entire scene is set against a dark wooden background.

Stress Relief Mechanism in Times of the Crisis

Stress Relief Mechanisms: Social. Gaming. Entertainment.

As people are forced to stay inside more and unable to freely move in public spaces, Indians are leveraging their mobile phones to de-stress and unwind with their families despite the distance.



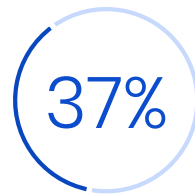
Communication and social apps rule

4 in 10 smartphone users are spending more time on communication and social media apps to check in on loved ones and stay connected virtually.



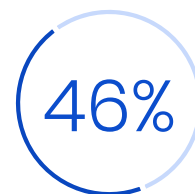
Increased news consumption

35% of consumers are constantly looking for more information, live updates and official guidelines thereby consuming more news than ever.



Share memes and funny posts

4 in 10 users are sharing funny posts, memes and other content with their friends and family.



Increased OTT and TV consumption

With all the time being spent at home, people are watching more content online.

App Usage Skyrockets



Image and Video Editing apps **see a 60% surge** in usage



Gaming app **usage grows by 110%**, especially games involving Strategy



Books and Comic apps see **200% growth**



Mobile browsing app activity **shoots up by 37%**



App traffic to Finance Apps has increased due to stock market volatility



News Apps witness a **30% surge in usage**.

How are Indians staying connected and entertained?

Consumers have taken to their mobiles as they seek entertainment, information, news and scourge for unique ways to engage themselves in times of social distancing

Top 5 Communication & Social Activities

- Outgoing and incoming calls
- Networking and communication apps
- Sharing information and news regarding corona outbreak
- Sharing health advice
- Sharing personal pictures and videos

50% of 14 – 24 year olds and Single folks are staying connected with family and friends via calls, communication and social apps.

Top 5 Entertainment Activities

- Watching more content online
- Watching more news
- Sharing memes
- Sharing entertaining posts
- Creating content

27% of those staying away from family are more likely to use entertainment apps to create content.

Q23. How do you think your media consumption habits changed because of the Corona-virus outbreak?

Q24. How did your time on your mobile phone change because of the Corona-Virus outbreak?

Q25. How are you utilizing the internet to stay connected to your family and friends?

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