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
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).
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**
- Male: 65%
- Female: 35%

**Baby Boomers (35+ y/o)**: 12%

**Millennials (25-34 y/o)**: 55%

**Gen Z (<24 y/o)**: 33%

**City**
- Pan-India survey covering all metros, Tier II cities and beyond

**Marital Status & Family Structure**
- Single: 66%
- Married: 32%

- Nuclear: 61%
- Joint: 29%
- Single: 7%
The COVID-19 Timeline in India

The Consumer Sentiment:
Awareness. Understanding. Expectation.

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

The Changing Behavior:

Stress Relief Mechanisms:
The COVID-19 Impact in India
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 India

Jan 30 To Mar 5
- First case reported in Kerala.
- Kerala government put Bengaluru IT firms on high alert.
- First 30 cases reported.
- China’s death toll crosses 3,000. Maharashtra CM asks people not to gather in large crowds.

Mar 6 To Mar 12
- Visa restrictions kick into effect.
- People rush to buy masks and hand sanitizers.
- Private and Government schools up to class 5th to be shut till March 31st.
- Paytm shuts down Gurgaon office for 2 weeks.

Mar 13 To Mar 18
- WHO declares Coronavirus crisis a pandemic.
- India suspends all tourist visas from March 13 – April 15 to prevent spread of Coronavirus.
- Karnataka government puts Bengaluru IT firms on high alert.
- Most tech companies declare compulsory work-from-home (WFH).
- IPL postponed.
- Malls, theatres, public spaces and events banned for 1 week. Schools, colleges and universities on holiday.

Mar 19 To Mar 21
- PM Modi announces nationwide Janta curfew on Sunday, 22nd March from 7am – 9 pm.
- Panic buying and hoarding kicks in across metros and Tier-II cities.
- Mumbai Dabbawalas suspend services.
- Testing labs increase from 52 to 65. ICMR.
- Director General of Civil Aviation asks Airlines to support passengers by waiving off cancellation/reschedule charges.
- Emergency fund announced by PM Modi is up and running.
- Government advises children and people above 65+ to stay at home.
- Supreme court functioning restricted to urgent matters only.
- Accenture lowers its revenue growth forecast.
- Restaurants in Delhi closed till March 31st.
- No scheduled international commercial passenger flights shall be allowed to land in India from March 22 for one week.

Mar 22
- Janta curfew in effect across India from 7am – 9pm.
- Section 144 imposed from 5pm – 12am.
- PM asks Indians to come to their balconies at 5pm to applaud frontline workers in healthcare and essential services.
- Emergency fund announced by PM Modi is up and running.
- Accenture lowers its revenue growth forecast.
- Restaurants in Delhi closed till March 31st.
- No scheduled international commercial passenger flights shall be allowed to land in India from March 22 for one week.

Mar 23
- Olympic postponement might be ‘inevitable’, says Japanese PM.
- DRDO starts testing for COVID-19.
- Delhi High Court suspends functions.
- Arunachal Pradesh, Gujarat, Tripura to be in complete lockdown till March 31st.
- Karnataka CM announces lockdown on entire state from 12am on March 23rd to April 1st.

The Consumer Sentiment in India

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.

Q7. What do you think was the reason for the outbreak of corona-virus?
Q8. What are the early symptoms of being affected by Corona-virus?
Q12. How do you think the Corona outbreak will affect the world economy?
Q13. How do you think the Corona outbreak affects your job/industry/business?

*Total sample – ISM Survey dates March 19th – 22nd*
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%
- **4 in 10** think the situation will ease out in one month

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

Q7. What do you think was the reason for the outbreak of corona-virus?
Q9. What is the approximate mortality rate reported from being affected by Corona-Virus?
Q11. How long do you think the world will take to be Corona-Virus free?

What are Indians doing to stay healthy and safe?

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

- **34%** 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

- **70%** 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.

- **46%** 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

Q10. What are the most important preventive measures to avoid the spread of Corona-Virus?
Q14. How satisfied are you by measures taken by the government towards Corona-Virus prevention & treatment?
Q15. Have you reduced human contact since the Corona-Virus outbreak was declared?

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

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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.

- **Very satisfied**: 34%
- **Somewhat satisfied**: 34%
- **Not very satisfied**: 18%
- **No at all satisfied**: 9%
- **Not aware of any solid measures**: 6%

**Mar 24**
PM Modi announces 21-day nationwide lockdown pan-India. Does not mention state on essential services. Panic and hoarding kick-in.

**Mar 22**
Janta curfew from 7am to 9pm observed. Section 144 imposed from 9pm to 12am.

**Mar 19**
PM Modi announces Janta curfew on Sunday.

**Mar 4**
Universal screening begins as most visas are suspended.

**Feb 13**
Screening process expanded to include arrivals from most affected countries.

**Jan 21**
Screening process expanded to Chennai, Bengaluru, Hyderabad, Cochin.

**Jan 17**
Thermal screening begins for arrivals from China and Hong Kong at Delhi, Mumbai and Kolkata international airports.

*Q14. How satisfied are you by measures taken by the government towards Corona-Virus prevention & treatment?*

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

App Usage Trend

As the number of cases reported in India spikes, interest in information, live updates and government communication rises.

News in times of lockdown

With the nation going into lockdown and everyone confined to their homes, people turn to their mobile phones to keep abreast of the happenings across the country. News consumption peaks on 22nd March in line with the Janata curfew.
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.

1. **App Usage Trend**
   By the end of Jan, web browsing app usage decreases but immediately surges after the first case is reported.

2. **Mobile-first Searches**
   Increased usage of browsing apps can signify that users are reaching out to smartphones first for any surfing needs. In the last week, however, the usage of browsing apps are seeing a gradual decrease.
Challenges due to the COVID-19 Pandemic

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

- **27%** Schools shutdown, no WFH
- **39%** Scarcity of Sanitizers & handwash
- **50%** Change in spending behavior
- **16%** Scarcity of food essentials

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.

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.

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

16% of respondents are facing challenges in sourcing food essentials.
The Shift in Consumer Behavior across the nation

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.

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Q15. Have you reduced human contact since the Corona Virus outbreak was declared?
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 or bathing soaps?
Q20.Post Corona outbreak, have your food consumption habits changed?

Total sample – 1874. Survey dates: March 19th – 22nd
How has shopping behavior changed?

### Reduced expenses
- 4 in 10: Public activities like movies, parties
- 3 in 10: Travel
- 3 in 10: Inter-city commute
- 2 in 10: Luxury items like accessories

### Increased expenses
- ~4 in 10: Personal care products
- 3 in 10: Home food
- ~2 in 10: Internet & Electronics
- 1 in 10: Books & Art supplies

### 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

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Q7. Since the outbreak of Corona-Virus, how has your grocery/household essentials (like food, soaps, shampoos etc.) buying behavior changed?
Q9. 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?
Q22. How has the corona-virus outbreak reduced your budgeted expenditure?

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Tech parks see a gradual decrease in footfall

**COVID-19 outbreak**
Post the initial news breakout of COVID-19, tech parks see a steady decrease in the number of people working from their offices.

**COVID-19 response**
Tech parks and central business districts evaluate mandatory work from home as number of reported cases rise. By March 16th, compulsory WFH kicks in.

90%

Footfall trend in tech parks
Restaurants in metro cities see a steep decline

1. **COVID-19 Response**
   Restaurants see a drastic dip as consumers avoid crowded spaces and take to cooking at home.

2. With the panic spreading across the world and rise in reported cases, central government takes preventive measures to enforce social distancing by asking restaurants and eateries to shut down.

Footfall trend in restaurants
Supermarkets and Grocery Stores shoot up in Tier II Cities

1. Supermarkets and grocery stores see a sudden surge in traffic as people begin to start stocking up on essentials.

2. After the 19th March announcement, people continue to flock to stores ahead of the March 22nd nationwide lockdown. Post which visits drop off sharply.

COVID-19 response

Footfall trend in supermarkets and grocery stores

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Stress Relief Mechanism in Times of the Crisis

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.

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?

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.

Experience Samsung Gear VR and the Galaxy S7

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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

**Top 5 Entertainment Activities**

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

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

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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