

Reactions to a Pandemic in a Connected World

COVID-19 Consumer Insights: India – Part 3

Based on survey conducted between April 2–6, 2020

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INMOBI 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, a mobile market research platform. The analysis explores the sentiments of the respondents from India in these unique times, their reaction to COVID-19 and identifies the change in their shopping and media consumption behavior. This is Part-3 of a series of reports on the current COVID-19 situation. The survey was conducted from April 2 to 6 with a sample size of 3116 smartphone users.

The survey also compares the consumer sentiment, future outlook, lifestyle, shopping and media trends to results from our previous survey conducted between March 19-22. This gives the readers of the report a view of the change between the time before lockdown and two weeks into the lockdown.

Executive Summary

Noticeable Change in Sentiment and Behavior among Indians since Lockdown

- While awareness of the actual origin of coronavirus has increased from 20% to 24%, misinformation continues to be abound, confusing and worrying Indians.
- 84% respondents are now strictly adhering to social distancing compared to 54% in the last survey; a rise of 55%.
- 40% Indians believe it will take the world anywhere between 6-12 months to be rid of coronavirus. This is a 90% increase since the last survey held before the lockdown.

Gen Z: Sentiments. Outlook. Shopping. Media Trends

- Current state of mind: 27% sad. 67% think mortality rate is higher than 6%. 28% confused about the future.
- 67% are seeing an increase in their budgeted spends mainly on food and WIFI/data usage
- More than other generations, 35% are playing games on their phones, 33% are listening to music, and 26% are bingeing on OTT content.

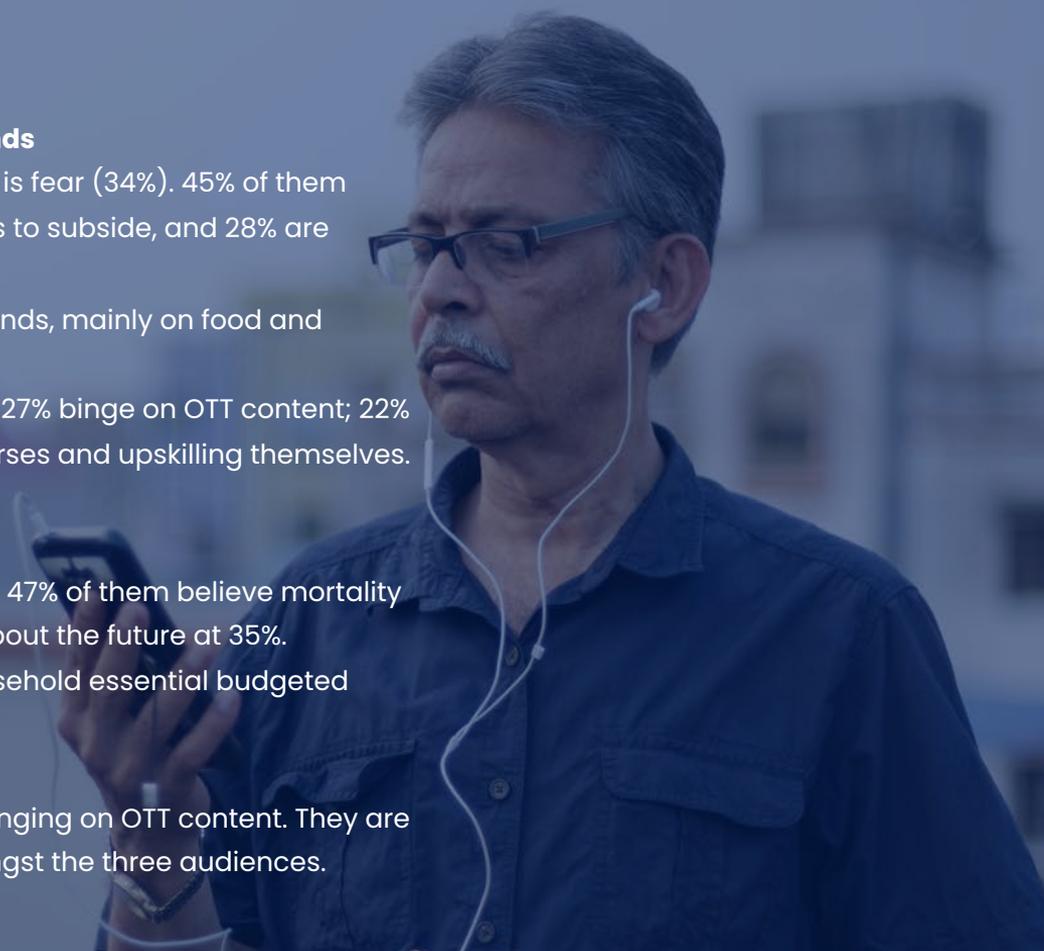
Executive Summary

Millennials: Sentiments. Outlook. Shopping. Media Trends

- The most common emotion among millennials today is fear (34%). 45% of them believe that the current situation will take 6-12 months to subside, and 28% are optimistic about the future.
- 62% millennials see an increase in their budgeted spends, mainly on food and WIFI/data usage
- Millennials are the largest consumers of news at 46%. 27% binge on OTT content; 22% play games on their phones, 17% are doing online courses and upskilling themselves.

Gen X: Sentiments. Outlook. Shopping. Media Trends

- 56% of Gen X population feels equally sad and fearful. 47% of them believe mortality rate to be less than 5% and are the most optimistic about the future at 35%.
- 43% of Gen X don't see a change in their grocery/household essential budgeted expenditure.
- Women spend more than men on WIFI/data usage.
- 39% of Gen X population is watching TV while 16% is bingeing on OTT content. They are least likely to play games on their smartphones amongst the three audiences.

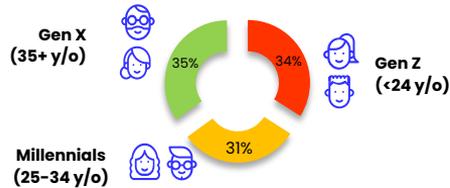


Profile of Survey Respondents

The survey was conducted on the InMobi Pulse platform and a total of 3116 unique and valid responses were collected. The following is the demographic profile of the respondents



GENDER & AGE

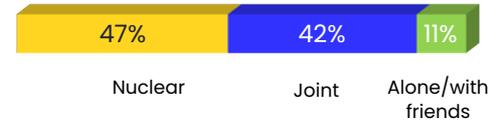


GEOGRAPHY

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



MARITAL STATUS & FAMILY STRUCTURE



Content

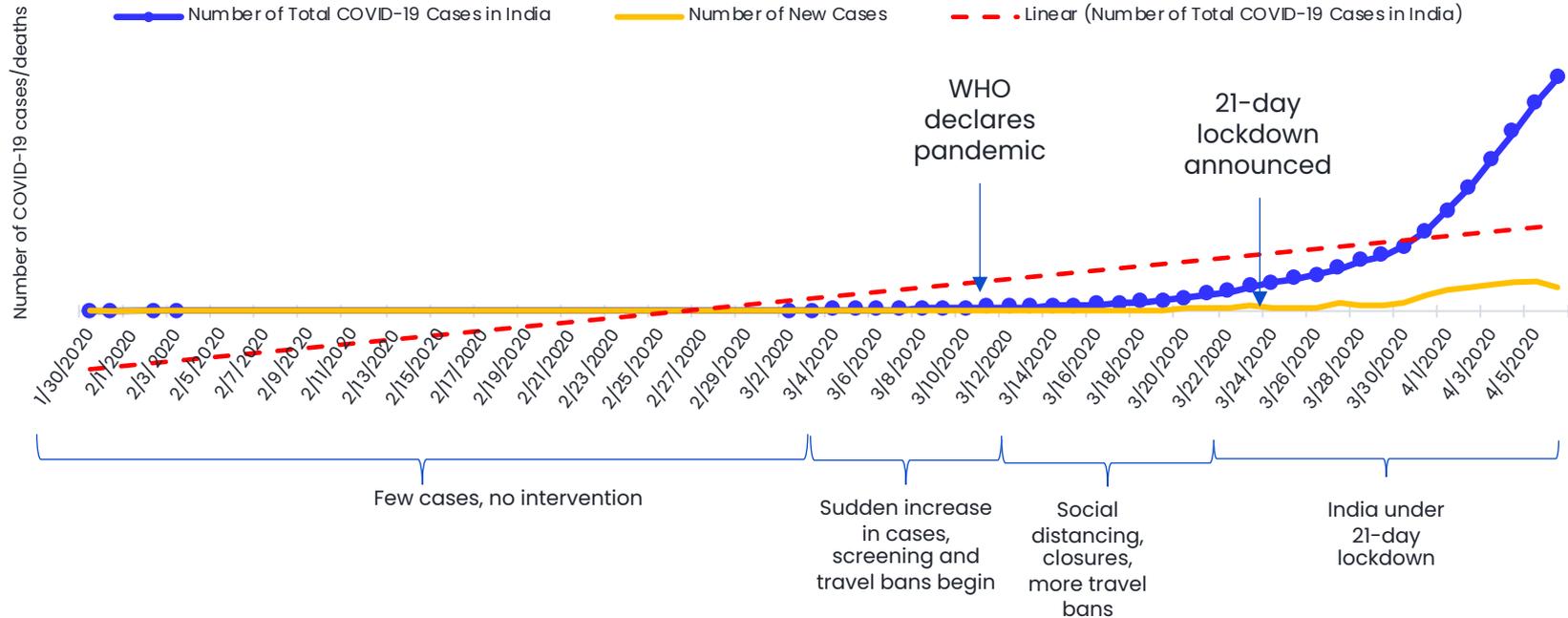
- 01 The COVID-19 Timeline in India
- 02 The Overall Consumer Sentiment and Behavior in India during the lockdown
- 03 The Impact of COVID-19 on Gen Z:
Awareness. Outlook. Shopping. Media
- 04 The Impact of COVID-19 on Millennials:
Awareness. Outlook. Shopping. Media
- 05 The Impact of COVID-19 on Gen X:
Awareness. Outlook. Shopping. Media

The COVID-19 Timeline in India



The COVID-19 Timeline in India

Since Coronavirus first came to the world's notice in January 2020, it has spread to at least 180+ countries.



Key Events in the Timeline of COVID-19 in India¹



Sources: Deccan Herald - <https://www.deccanherald.com/national/coronavirus-live-updates-11-new-cases-in-maharashtra-3-in-punjab-india-tally-climbs-to-274-789888.html#45>
 COVID19 - <https://www.covid19india.org/>
 India Today - <https://www.indiatoday.in/india/story/coronavirus-in-india-tracking-country-s-first-65-covid-19-cases-india-today-154688-2020-03-18>

1. Events in India and across the Globe in a few cases

A photograph of a train at a station platform. The train is white with blue accents and has 'बदरपुर' (Badarpur) written on its front. The platform has a sign that says 'निकास Exit' (Exit) with an upward arrow and a person icon. There is also a sign for 'Badarpur' and 'बदरपुर'. The text 'The Shift in Consumer Sentiment and Behavior in India Since Lockdown' is overlaid in large white font on the left side of the image.

The Shift in Consumer Sentiment and Behavior in India Since Lockdown

The Overall Consumer Sentiment: Awareness. Understanding. Outlook.

Eight days into the 21-day lockdown, Indians are cooped up at home with their families and in some cases away from home. Inundated with information, their opinions and outlook are being shaped by the challenges they face and their grit.



72%

Exposed to misinformation on COVID-19

3 out of 4 respondents are unsure of the origins of Coronavirus. The majority think it originated from a biomedical experiment gone wrong or bio-war between US and China or bat soup consumption in China.



84%

Find Social distancing Critical

The majority understand the importance of social distancing and are following it to a great extent especially due to the lockdown. However, awareness of other preventive measures is only 50%.



56%

Expect losses to their industry/business

Over a half of the respondents expect to see financial losses to their industries/business.



75%

Appreciate the 21-day lockdown measure

Amongst all the measures taken by the government through the COVID-19 situation, the 21-day lockdown was the most appreciated. The ban on international travel and interstate transportation are the 2nd and 3rd most favorite measures.



69%

Are concerned about daily wage earners

Most Indians are concerned about the impact on migrant laborers/daily wage earners and the underprivileged class.

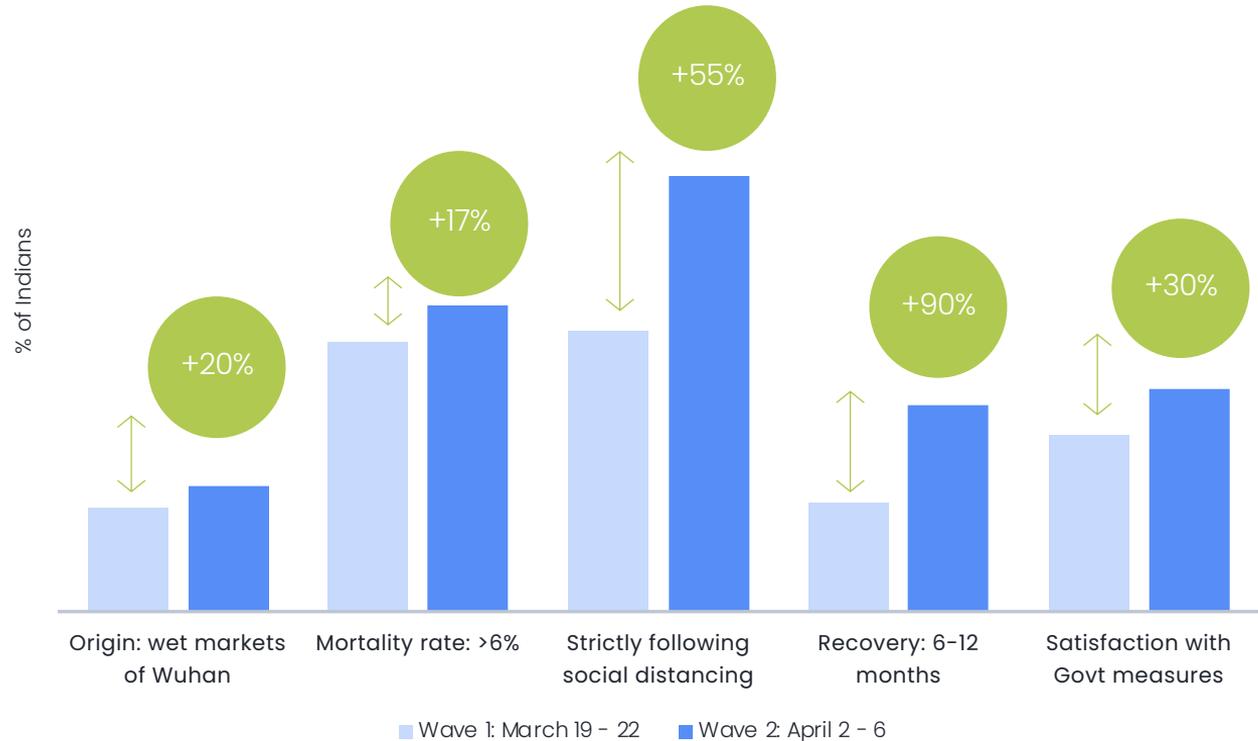
Q7. What do you think was the reason for the outbreak of corona-virus?
 Q10. What are the most important preventive measures to avoid the spread of Corona-Virus?
 Q13. How do you think the Corona outbreak affects your job/industry/business?
 Q11N. Which of the following steps / announcements by the government did you like the most?
 Q13N. According to you, what is the biggest issue faced by India because of this lockdown?
 Total sample - 3116. Survey dates: April 2nd to 4th

Change in Awareness, Understanding and Outlook

Before Lockdown vs During Lockdown (Week 2)

In a matter of 1.5 weeks, a lot has changed for India and its citizens. While awareness about the origin of the virus has seen a 20% increase, the rising number of deaths in India and across the world has pushed them into a more fatalist world view.

The 21-day lockdown has keenly impressed upon them the necessity of social distancing and consequently they are realizing that the impact of this virus will be felt for a long time to come. For this and other measures taken by the government to curb the spread and treat those infected, there is an increase in satisfaction with the government.



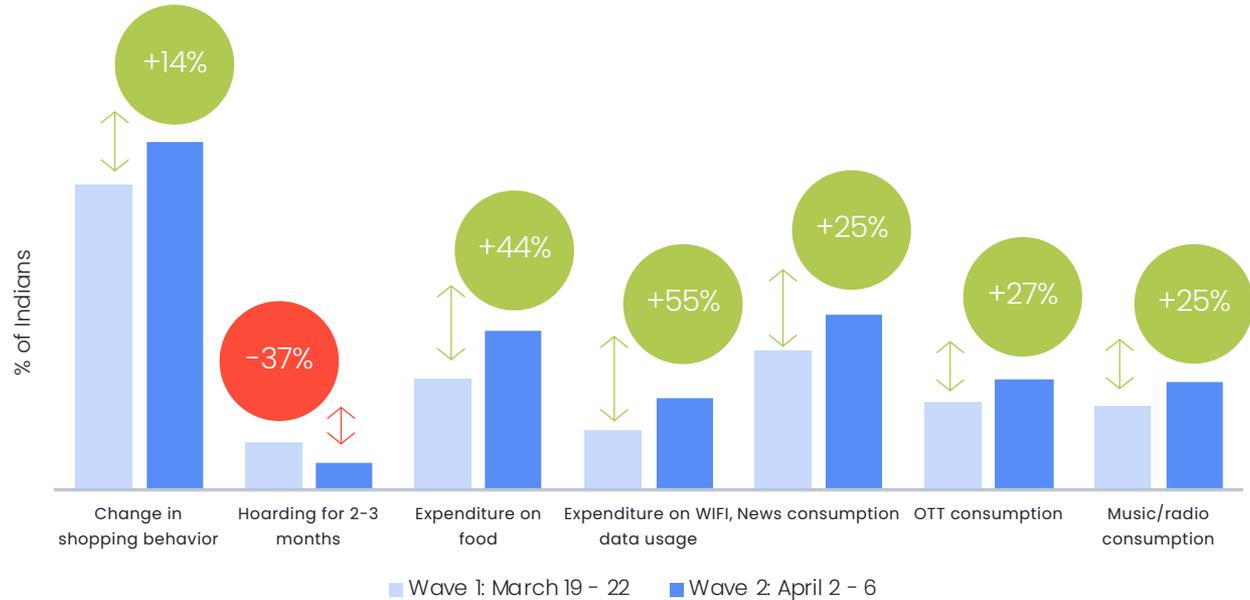
Change in Shopping and Media Consumption Patterns

Before Lockdown vs During Lockdown (Week 2)

The current situation has changed the shopping and media consumption habits of Indians unlike anything before. With everyone spending more time at home, they are finding new ways to stay informed and engaged.

In 1.5 weeks, 14% Indians have further changed their typical shopping behavior of groceries and household essentials. Fewer folks are hoarding items and buying in bulk, thus ensuring others continue to have access to essentials.

With everyone staying at home, expenditure on food and WIFI/data usage has seen a dramatic increase. As has consumption of news, OTT content and music.

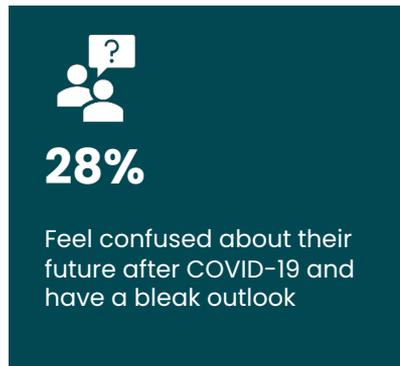
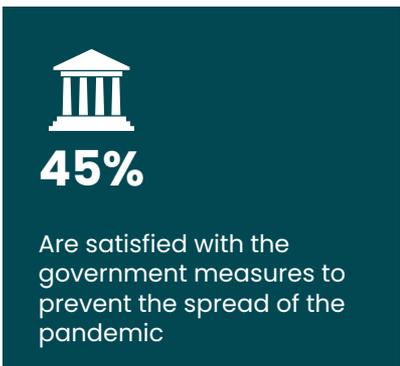
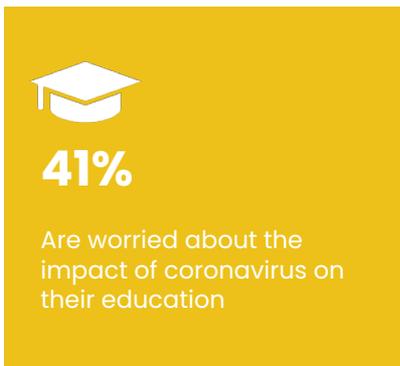
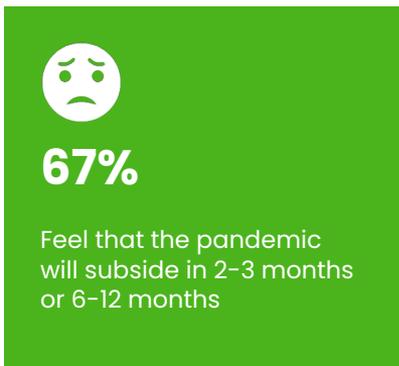


The Impact of COVID-19 on Gen Z

Young Indians who are in the age group of 14 – 24 of which 57% are currently still pursuing their education. Only 10% of them stay alone/with friends. 90% stay with their families and have minimal responsibilities towards their home. They have a lot of time on their hands and are keeping themselves engaged.

Gen Z Sentiment and Outlook

The GenZ population is in a negative state of mind and has a bleak outlook of the future despite the limited awareness



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?
 Q14. How satisfied are you by measures taken by the government towards Corona-Virus prevention & treatment?
 Q7N. Which of the following best describes your feeling about the Corona outbreak?
 Q8N. How do you feel about your future?
 Total sample - 3116. Survey dates: April 2nd to 4th

Gen Z Lifestyle and Spending Habits

67% are seeing an increase in their budgeted expenditure on key categories



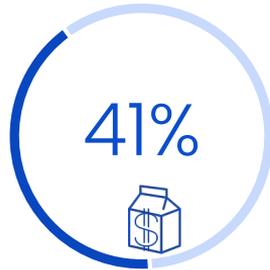
Upgrading their Wi-Fi & Data packages

Across all age groups, Gen Z is the biggest spender - 26% are upgrading WIFI and data usage on their smartphones compared to only 20% of those above 35 years.



Increasing spends on Personal Care

20% of Gen Z is spending on personal care products compared to 15% from Gen X.



Contributing to Essentials spends

In fact, with increasing expenses on food, 41% of Gen Z who are living with their families, have increased their expenditure on essentials. Thus contributing to the household.



Stocking up for less than a week

In line with their thinking that the world will soon be rid of coronavirus, 56% of Gen Z prefer to buy for the short term (less than a week) especially when it comes to groceries and household essentials.



Learning/ picking up something new

11% are picking up a new skill or renewing an old one. They are also twice as likely to do so than other age groups.

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

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

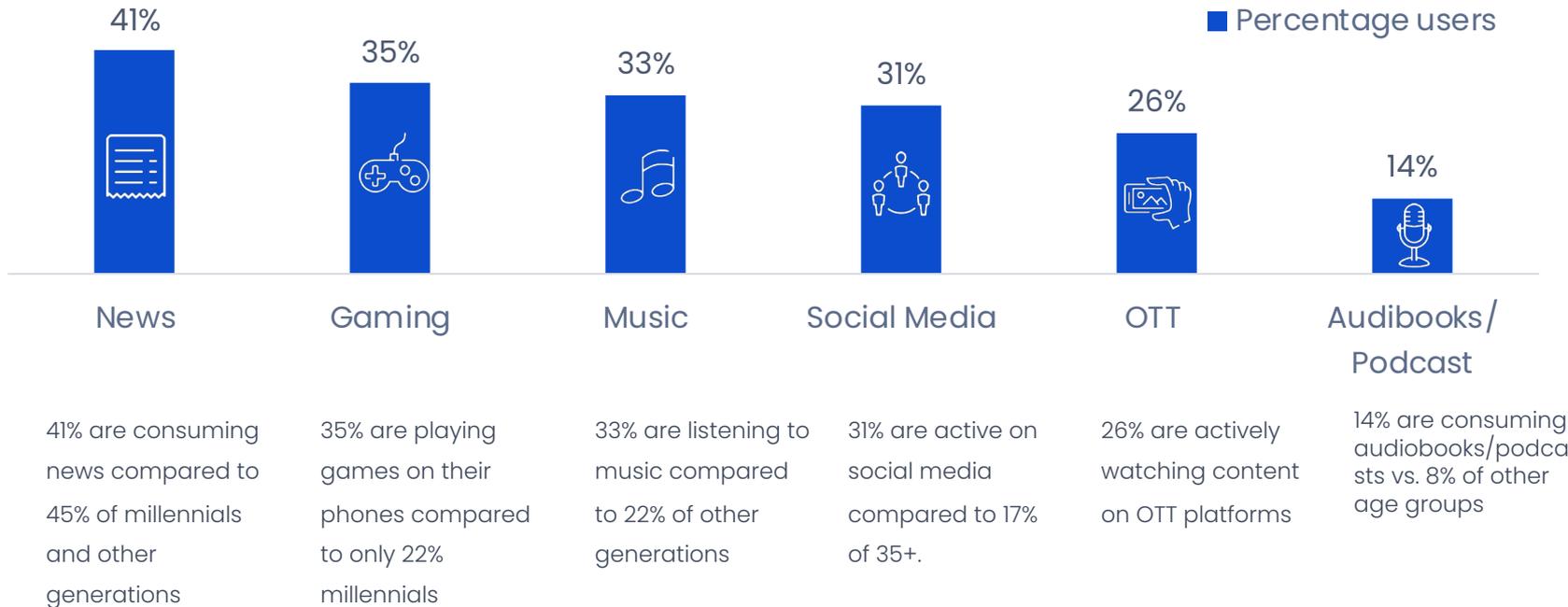
Q18N. Which area of your life will be the most affected by the lockdown? Please choose 3 most relevant options.

Q17N. How are you trying to make use of time you get to spend at home?

Q18N. How do you pass time during this lockdown?

Total sample - 316. Survey dates: April 2nd to 4th

Gen Z Media Consumption Trends



Q23. How do you think your media consumption habits changed because of the Corona-virus outbreak?
 Q17N. How are you trying to make use of time you get to spend at home?
 Q18N. How do you pass time during this lockdown?
 Total sample - 3116. Survey dates: April 2nd to 4th

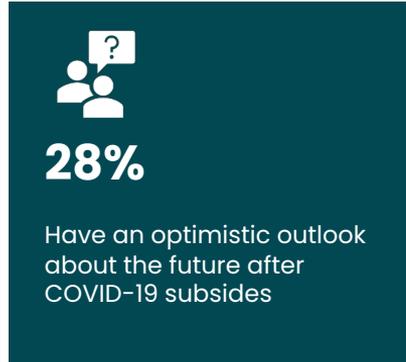
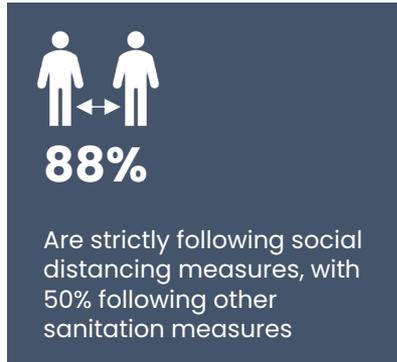
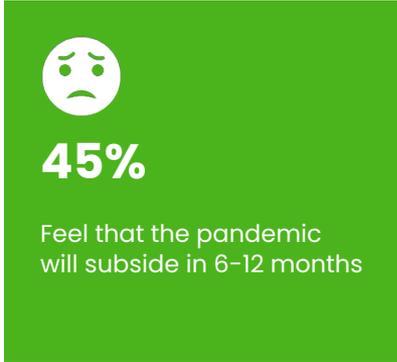
The Impact of COVID-19 on Millennials

Young Indians who are in the age group of 25 – 34 of whom 60% are married, 87% live with their families and 50% earn above Rs. 30,000 per month. These folks have relatively more responsibilities and are more likely to spend time with their families. They are also tech savvy and rely on technology to get their work done, remain informed and be entertained.



Millennial Sentiment and Outlook

The GenZ population is in a negative state of mind and has a bleak outlook of the future despite the limited awareness



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Millennial Lifestyle and Shopping Trends

62% are seeing an increase in their budgeted expenditure on key categories



Planning their shopping for a few days at a time

Millennials are relatively more planned in their shopping. The majority - 58%, buy their groceries and household essentials for a few days at a time.



Increase spends on food and essentials

Across all age groups, 42% of millennials are spending more on food items, compared to 38% from Gen X.



More likely to invest in learning cooking

Millennials are most inclined to investing in learning cooking and practicing it daily

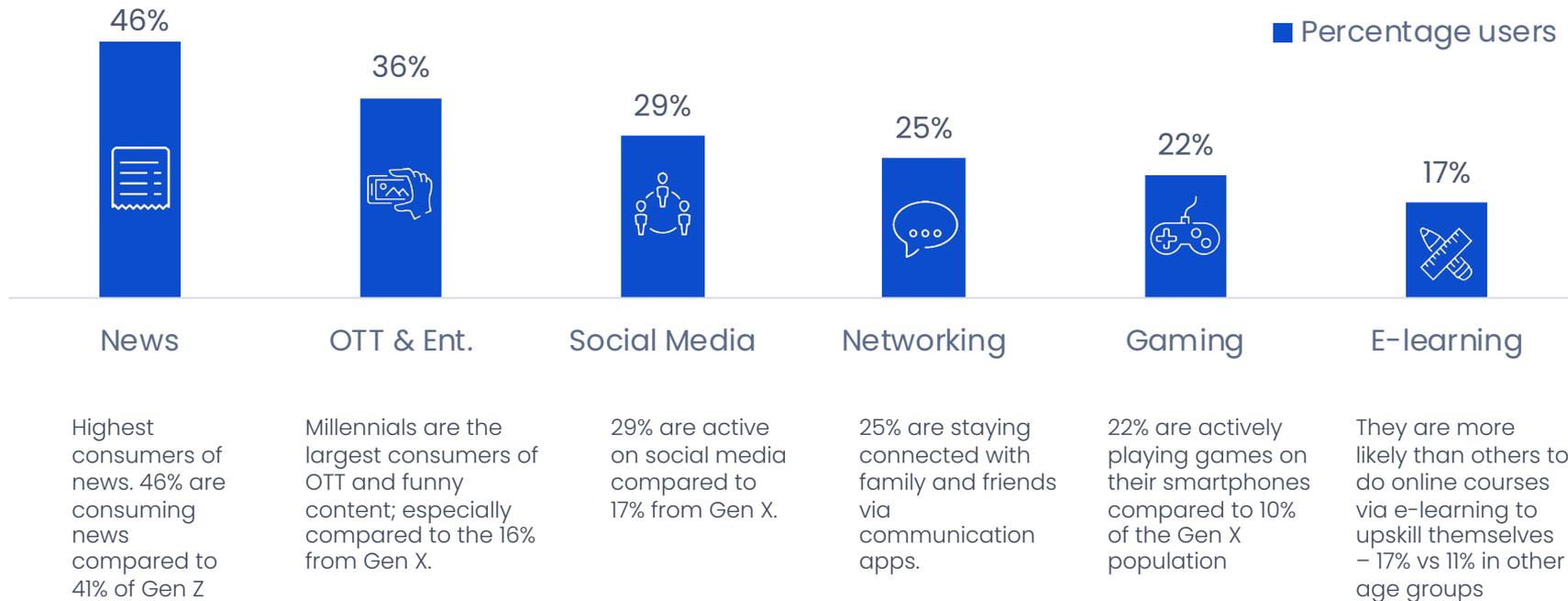


Partaking in Household Chores

36% of millennials are actively participating in household chores such as cleaning and cooking

Q17. Since the outbreak of Corona-Virus, how has your grocery / household essentials (like food, soaps, shampoos etc.) buying behavior changed?
 Q21. How has the corona-virus outbreak increased your budgeted expenditure?
 Q16N. Which area of your life will be the most affected by the lockdown? Please choose 3 most relevant options.
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Millennial Media Consumption Trends



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The Impact of COVID-19 on Gen X

Older, more mature Indian adults who are above the age of 35, 90% of whom are married and living with their families. These folks are more settled in life, their opinions are based on the challenges they have faced and overcome. Their behaviors are more in line with the responsibilities they manage daily. Their understanding of the world is wider and deeper.

Gen X Sentiment and Outlook

The Gen X population is in a negative state of mind and has a bleak outlook of the future despite the limited awareness



56%

Are equally sad and fearful due to the outbreak and its impact



2 in 3

Are unaware of the origins of the virus, two weeks into lockdown



45%

Feel that the pandemic will subside in 6-12 months



53%

Expect a very high mortality rate of above 6 percent, while 47% believe it will be less than 5 percent



60%

Are worried about the impact of coronavirus on their financial health



48%

Are satisfied with the government measures to contain the spread of the pandemic



87%

Are strictly following social distancing measures, with 46% following other sanitation measures



35%

Are optimistic about the future after COVID-19 subsides; while if staying alone, only 29% are optimistic

Q7. What do you think was the reason for the outbreak of corona-virus?
 Q8. 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?
 Q14. How satisfied are you by measures taken by the government towards Corona-Virus prevention & treatment?
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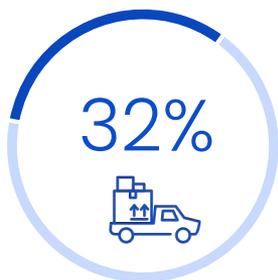
Gen X Lifestyle and Spending Habits

67% are seeing an increase in their budgeted expenditure on key categories



Struggling to find time outside of work and chores

They are juggling while managing work and doing household chores. This leaves them little or no time to indulge in other activities.



Stocking up for a month or more

Compared to 28% of other age groups, 32% of Gen X are stocking up on groceries and household essentials for a month.



Alone upgrading Wi-Fi & Data packages

Only 20% are spending on WIFI compared to 26% of Gen Z.



More spending on data packs by women

Women are spending more than men on WIFI and mobile data usage.

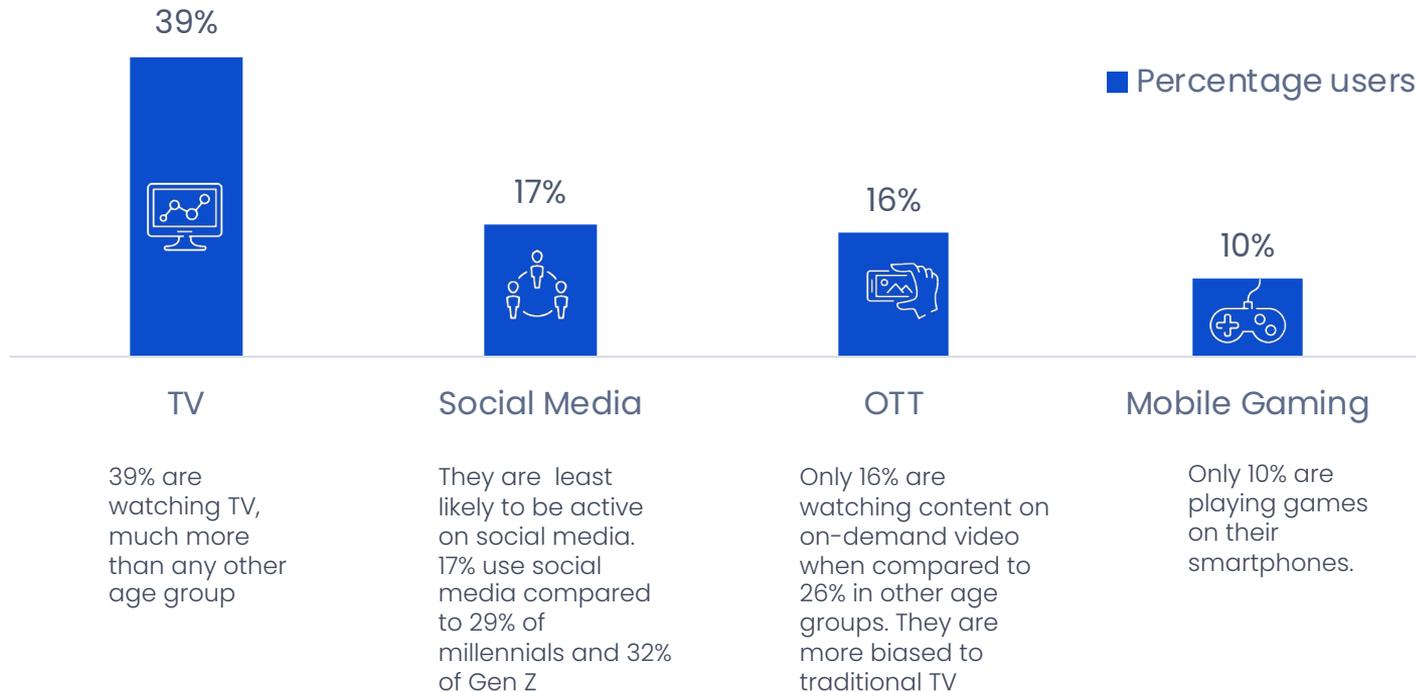


Partaking in Household Chores

More likely than others to do household chores, 40% are doing household chores compared to 36% millennials and 25% Gen Z.

Gen X Media Consumption Trends

As the majority have children, their schedule revolves around providing structure in the absence of school and day care. They are actively engaging everyone, while managing work and doing household chores. This leaves them little or no time to indulge in other activities which is reflected in their media consumption trends which are limited compared to others age groups.



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Based on survey responses on InMobi Pulse held between
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