Reactions to a Pandemic in a Connected World

COVID-19 Consumer Insights: India – Part 3

Based on survey conducted between April 2–6, 2020

Powered by InMobi Pulse
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.


- 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 binging on OTT content.
Executive Summary

- 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.

- 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 binging 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
- Male: 62%
- Female: 38%

GEN X (35+ y/o): 35%
Gen Z (<24 y/o): 34%
Millennials (25-34 y/o): 31%

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

MARITAL STATUS & FAMILY STRUCTURE
- Single: 47%
- Married: 48%
- Nuclear: 47%
- Joint: 42%
- Alone/with friends: 11%
The COVID-19 Timeline in India

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The Overall Consumer Sentiment and Behavior in India during the lockdown

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The Impact of COVID-19 on Gen Z:
Awareness. Outlook. Shopping. Media

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The Impact of COVID-19 on Millennials:
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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.

Few cases, no intervention
Sudden increase in cases, screening and travel bans begin
Social distancing, closures, more travel bans
India under 21-day lockdown

WHO declares pandemic
21-day lockdown announced

Number of Total COVID-19 Cases in India
Number of New Cases
Linear (Number of Total COVID-19 Cases in India)

https://www.covid19india.org/
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.

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.

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%.

Expect losses to their industry/business

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

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.

Are concerned about daily wage earners

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

- **74%**
  - Are feeling highly negative emotions such as Sadness, Fear, Disgust and Anger

- **3 in 4**
  - Are unaware of the origins of the virus, two weeks into the lockdown

- **67%**
  - Feel that the pandemic will subside in 2–3 months or 6–12 months

- **2 in 3**
  - Expect a very high mortality rate of above 6 percent, while only 33% believe it will be less than 5 percent

- **41%**
  - Are worried about the impact of coronavirus on their education

- **45%**
  - Are satisfied with the government measures to prevent the spread of the pandemic

- **79%**
  - Are following social distancing measures. This is 9% lower than the average respondent.

- **28%**
  - Feel confused about their future after COVID-19 and have a bleak outlook

Q7. What do you think was the reason for the outbreak of corona-virus?
Q8. How satisfied are you by measures taken by the government towards Coronavirus prevention & treatment?
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

- **26%** 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.

- **20%** Increasing spends on Personal Care
  - 20% of Gen Z is spending on personal care products compared to 15% from Gen X.

- **41%** 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.

- **56%** 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.

- **11%** 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?
Q16N. 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 – 3116. Survey dates: April 2nd to 4th
Gen Z Media Consumption Trends

- **News**: 41% are consuming news compared to 45% of millennials and other generations.
- **Gaming**: 35% are playing games on their phones compared to only 22% millennials.
- **Music**: 33% are listening to music compared to 22% of other generations.
- **Social Media**: 31% are active on social media compared to 17% of 35+.
- **OTT**: 26% are actively watching content on OTT platforms.
- **Audibooks/Podcast**: 14% are consuming audiobooks/podcasts vs. 8% of other age groups.

Q23. How do you think your media consumption habits changed because of the Corona-virus outbreak? Q24. How are you trying to make use of the time you get to spend at home? Q25. 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

- **81%** Are feeling highly negative emotions such as Fear, Sadness, Disgust and Anger; with 34% fearful

- **3 in 4** Are unaware of the origins of the virus, two weeks into lockdown; Millennials are more likely to believe the conspiracy theories

- **45%** Feel that the pandemic will subside in 6–12 months

- **58%** Expect a very high mortality rate of above 6 percent, while 42% believe it will be less than 5 percent

- **40%** Are worried about the impact of coronavirus on their financial health

- **1 in 2** Millennials staying alone or with friends have taken to cooking for their daily food

- **88%** Are strictly following social distancing measures, with 50% following other sanitation measures

- **28%** Have an optimistic outlook about the future after COVID-19 subsides

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Q7. What do you think was the reason for the outbreak of coronavirus?
Q8. How satisfied are you by measures taken by the government towards Coronavirus prevention & treatment?
Q10. What is the approximate mortality rate reported from being affected by Coronavirus?
Q11. How long do you think the world will take to be Coronavirus free?
Q12. Which of the following best describes your feeling about the Coronavirus outbreak?

Total sample – 3116. Survey dates: April 2nd to 4th
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, shampoo etc.) buying behavior changed?
Q21. How has the corona-virus outbreak increased your budgeted expenditure?
Q16. 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 – 3116. Survey dates: April 2nd to 4th.
# Millennial Media Consumption Trends

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage Users</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>News</td>
<td>46%</td>
<td>Highest consumers of news; 46% are consuming news compared to 41% of Gen Z</td>
</tr>
<tr>
<td>OTT &amp; Ent.</td>
<td>36%</td>
<td>Millennials are the largest consumers of OTT and funny content; especially compared to the 16% from Gen X.</td>
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<td>Social Media</td>
<td>29%</td>
<td>29% are active on social media compared to 17% from Gen X.</td>
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<tr>
<td>Networking</td>
<td>25%</td>
<td>25% are staying connected with family and friends via communication apps.</td>
</tr>
<tr>
<td>Gaming</td>
<td>22%</td>
<td>22% are actively playing games on their smartphones compared to 10% of the Gen X population.</td>
</tr>
<tr>
<td>E-learning</td>
<td>17%</td>
<td>They are more likely than others to do online courses via e-learning to upskill themselves – 17% vs 11% in other age groups.</td>
</tr>
</tbody>
</table>

**Q23.** How do you think your media consumption habits changed because of the Corona-virus outbreak?
**Q29N.** How are you trying to make use of the time you get to spend at home?

Total sample - 3116. Survey dates: April 2nd to 4th.
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.

<table>
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<td>56%</td>
<td>Are equally sad and fearful due to the outbreak and its impact</td>
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<td>2 in 3</td>
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<td>60%</td>
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<td>48%</td>
<td>Are satisfied with the government measures to contain the spread of the pandemic</td>
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<td>87%</td>
<td>Are strictly following social distancing measures, with 46% following other sanitation measures</td>
</tr>
<tr>
<td>35%</td>
<td>Are optimistic about the future after COVID-19 subsides; while if staying alone, only 29% are optimistic</td>
</tr>
</tbody>
</table>

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**Q7. What do you think was the reason for the outbreak of corona-virus?**
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Gen X Lifestyle and Spending Habits

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

- **20%**
  - 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.

- **32%**
  - 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.

- **20%**
  - Alone upgrading Wi-Fi & Data packages
  - Only 20% are spending on WIFI compared to 26% of Gen Z.

- **23%**
  - More spending on data packs by women
  - Women are spending more than men on WIFI and mobile data usage.

- **40%**
  - 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 other age groups.

39% are watching TV, much more than any other age group.

They are least likely to be active on social media. 17% use social media compared to 29% of millennials and 32% of Gen Z.

Only 16% are watching content on on-demand video when compared to 26% in other age groups. They are more biased to traditional TV.

Only 10% are playing games on their smartphones.

Q23. How do you think your media consumption habits changed because of the Corona-virus outbreak?
Q29. How are you trying to make use of time you get to spend at home?
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Reactions to a Pandemic in a Connected World

COVID-19 Consumer Insights: India – Part 3

Based on survey responses on InMobi Pulse held between April 2–6

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