

Reactions to the Pandemic in a Connected World

COVID-19 Consumer Insights: Southeast Asia – Part 1

Based on InMobi Audience Intelligence from Jan 1 to Mar 23 in Indonesia, Malaysia, Singapore and Philippines, and survey responses on the InMobi Pulse platform from March 24 to 28 in Indonesia

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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 respondents from Indonesians in these unique times, their reaction to COVID-19 and identifies the change in their behavior, both offline and online. This is Part-1 of a series of reports on the current COVID-19 situation.

PLATFORM INSIGHTS (Singapore, Philippines, Malaysia and Indonesia)

- 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 23 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 Southeast Asia)

SURVEY RESPONSES (Indonesia)

- The survey was conducted on InMobi Pulse, a mobile market research platform, from March 24 to 28 with a sample size of 1056 smartphone users

Executive Summary

Misinformation abounds amidst high panic around COVID-19

- 80% of Indonesian survey respondents are not sure about the origins of the virus
- 80% of Indonesians survey respondents preferred quality over the price in the personal care category
- Only 14% survey Indonesian respondents understand the symptoms of the pandemic
- 16% of the Indonesian survey respondents are very satisfied with the government measure

Hospitals and Grocery stores dominate footfall across SEA

- Hospital visit surge, as high as 400% in certain countries, across Singapore, Indonesia, Malaysia and Philippines
- Malaysia experiences a 148% surge in people shopping for the daily needs
- Local travel sees a decline in the usage in Singapore amidst the pandemic

App Usage Skyrockets as Southeast Asians take to mobile

- Image and Video editing apps, Books, Social Media and Gaming apps are the top stress relief mechanisms for consumers across SEA
- Travel app usage grows by 586% with people trying to track or reschedule their travel plans amidst the lockdown in Indonesia
- Communication apps witness a 900 % surge in Malaysia

The Chapters

01

The COVID-19 Timeline in Southeast Asia

02

The Online and Offline Shift in SEA:

- Singapore
- Philippines
- Malaysia

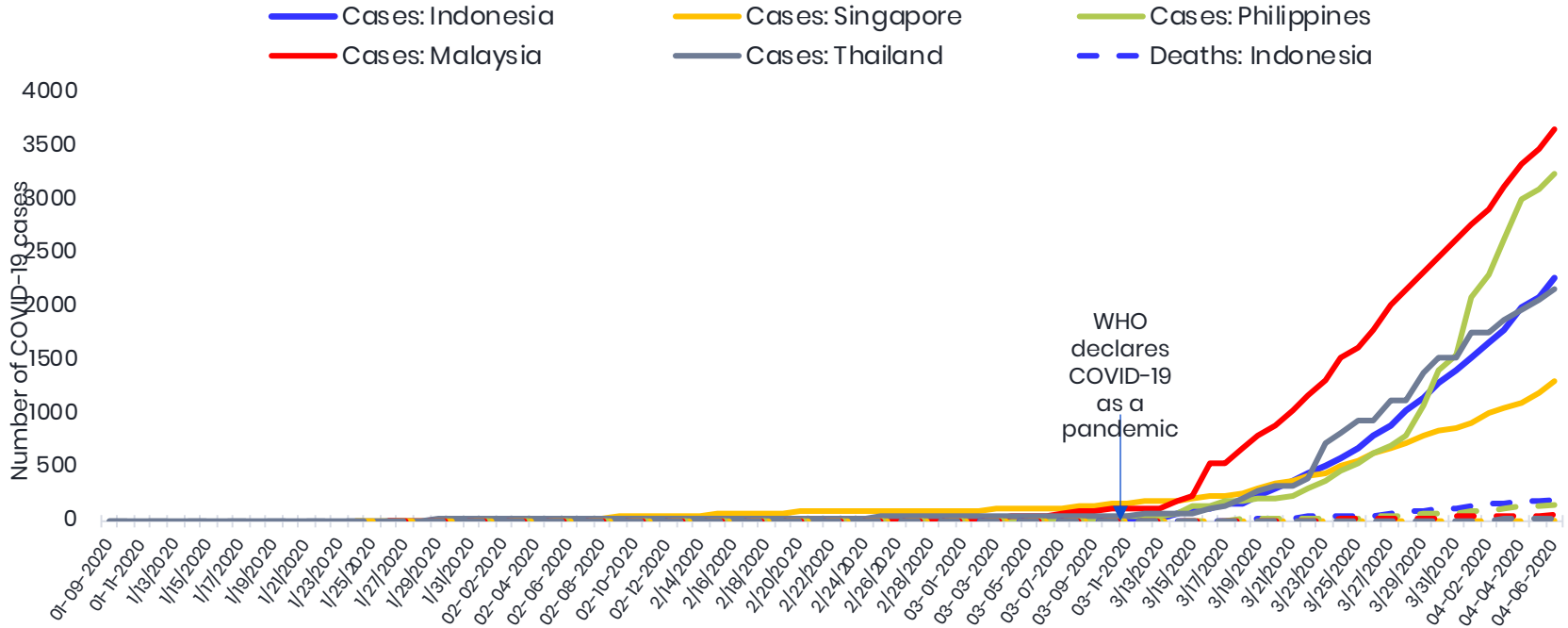
03

The Indonesian Consumer Behavior

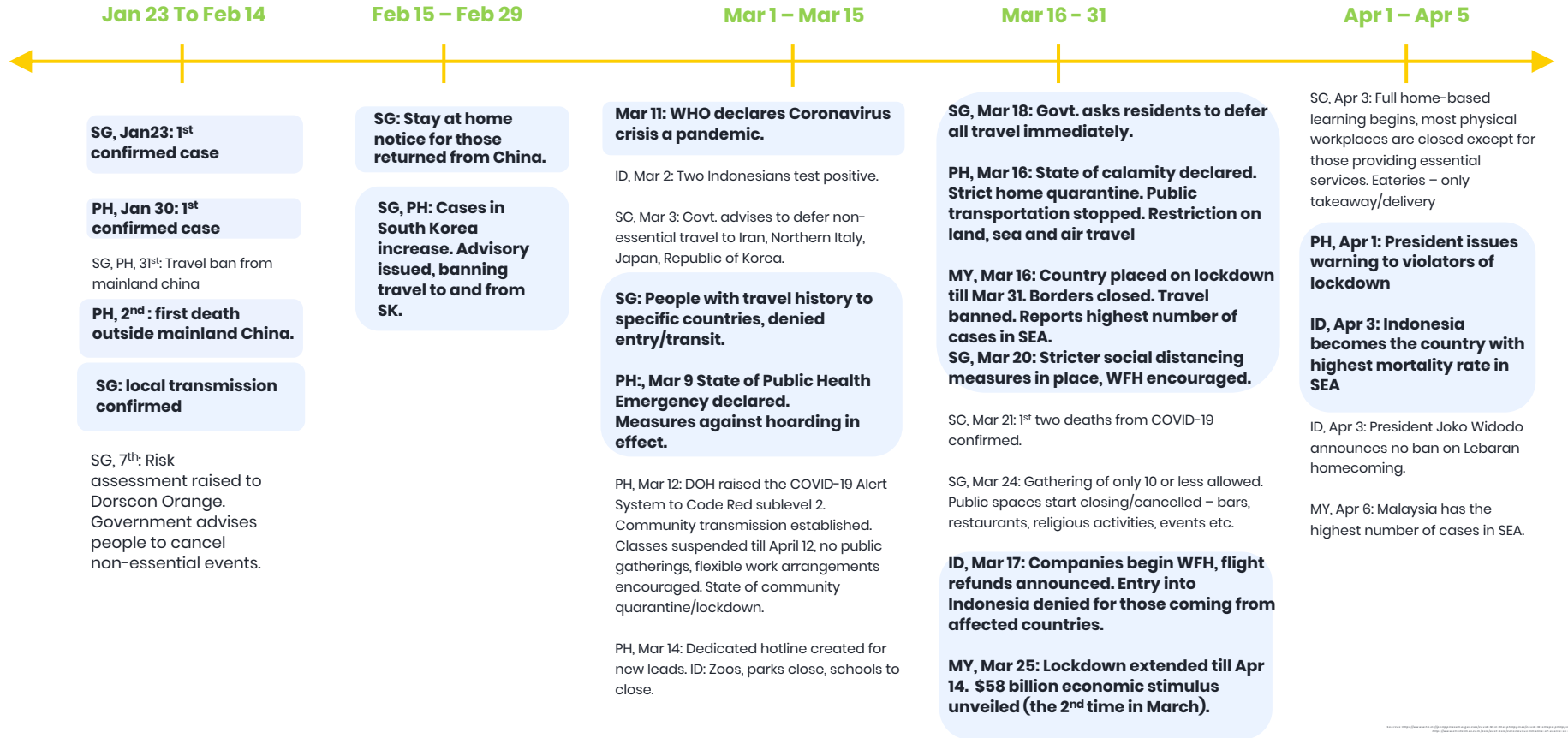
- Consumer sentiment
- Changing Lifestyle
- Shopping Behavior
- App Usage

The COVID-19 Impact in Southeast Asia

Since Coronavirus first came to the world's notice in late last year, it has reportedly spread to at least 180 countries.



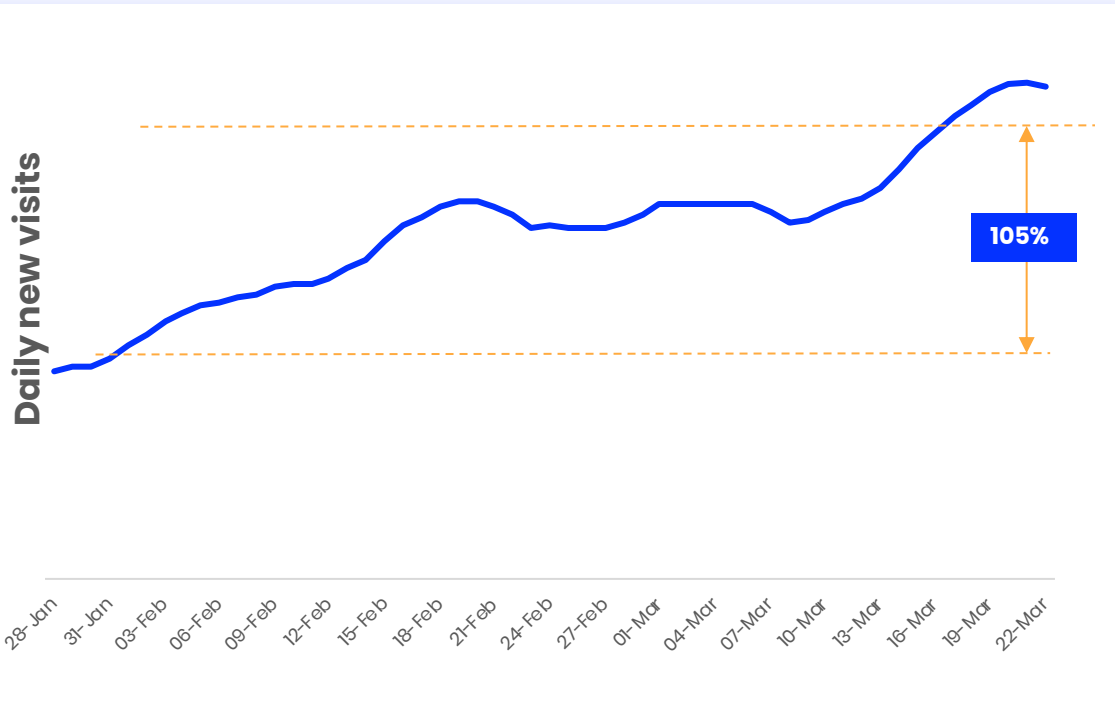
Key Events in the Timeline of COVID-19 in Southeast Asia



SINGAPORE

A wide-angle photograph of the Singapore skyline at dusk. The image is overlaid with a semi-transparent blue filter. In the foreground, the Marina Bay Sands hotel is prominent on the left, with its distinctive curved facade and rooftop garden. To the right, the Esplanade - Theatres on the Bay is visible, resembling a lotus flower. The background is filled with a dense cluster of skyscrapers, some of which are illuminated. The sky is a mix of deep blue and purple, with scattered clouds. A bridge spans across the water in the lower right portion of the image.

Hospital visits surge with rise in reported cases



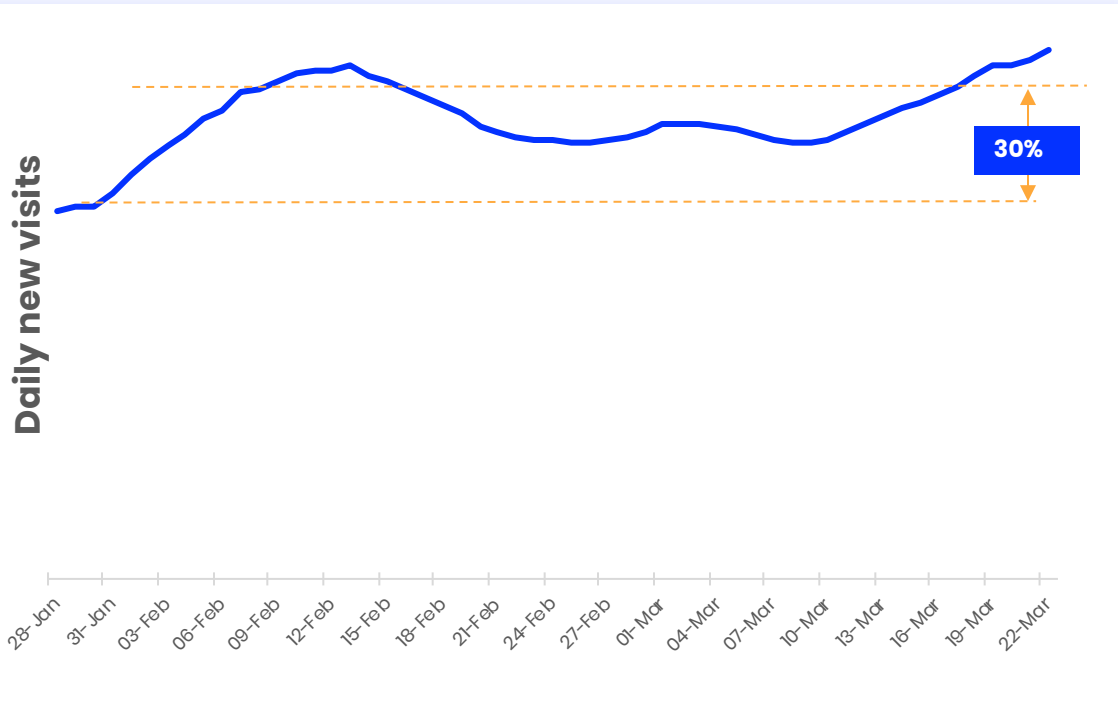
COVID-19 **OUTBREAK**

As the number of cases in Singapore began to rise, more people visited the hospitals to get tested.

COVID-19 **RESPONSE**

This trend is in line with the rising cases witnessed in Singapore as those affected visit hospitals to get treatment, while others go to get their symptoms checked.

Supermarket and Grocery Store visits shoot up for essentials



COVID-19 **OUTBREAK**

By the third week of March, the number of cases being reported has increased but was still highly contained compared to neighboring countries.

COVID-19 **RESPONSE**

Visits to supermarkets and grocery stores declined in the first week of March as the number of cases begin to stabilize. As the news of a potential lockdown emerges, Singaporeans visit supermarkets to stock up on essentials

App Usage Skyrockets

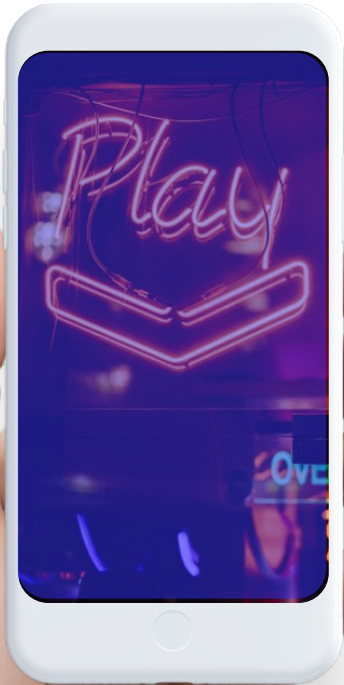


Image and Video editing apps **see a 100% surge** in usage



Gaming app **usage grows by 50%** especially games involving Strategy



Books and Comic apps see **310% growth**



Social media app activity **shoots up by 270%**



App traffic to Finance Apps has **increased by 35%** due to stock market volatility

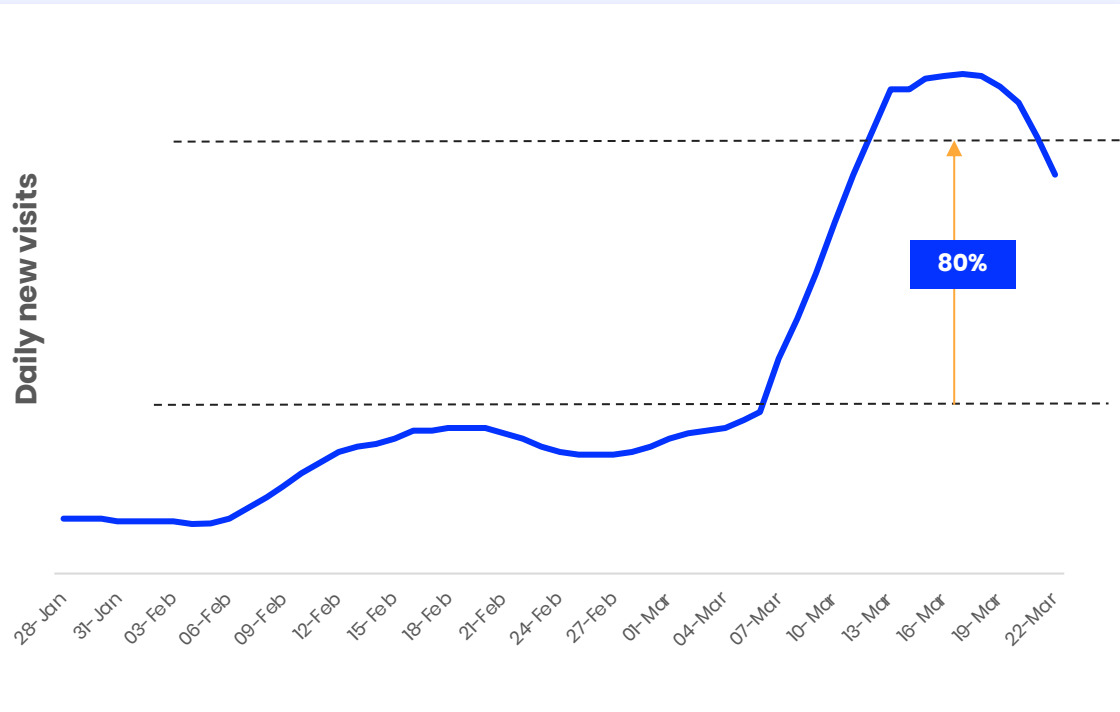


Travel Apps witness a **35% decline** in usage.

PHILIPPINES



Visits to Hospitals surge when WHO announces Global Pandemic



COVID-19 **OUTBREAK**

By the second week of March, the number of COVID-19 cases had spiked.

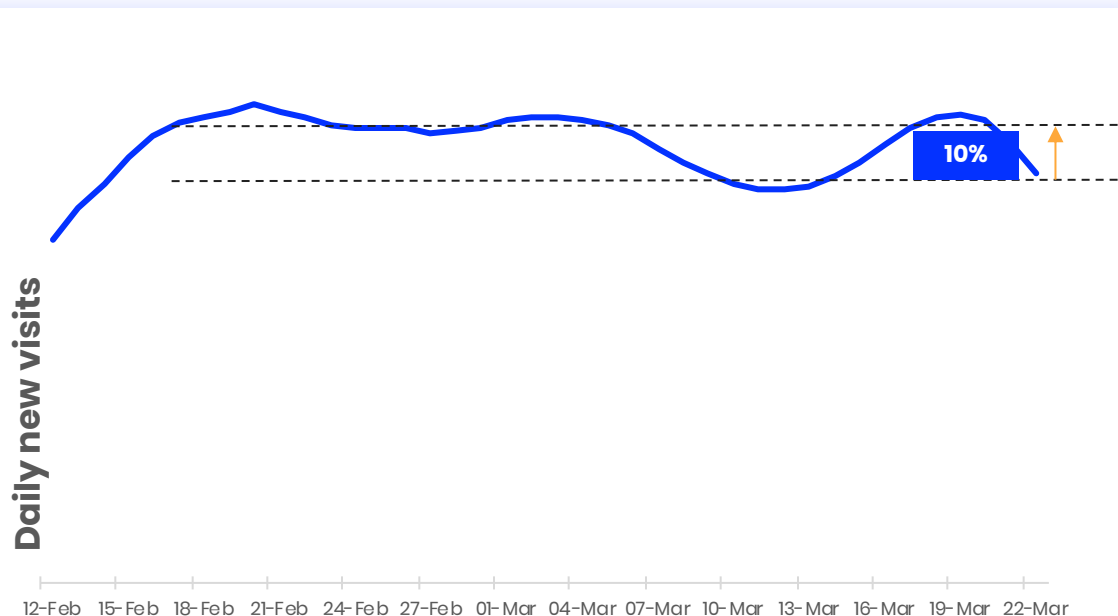
COVID-19 **RESPONSE**

As more people tested positive, and people panicked, they flocked to hospitals in the hopes of getting treated and tested. The decline post March 20th is in line with the community wide quarantine imposed that heavily restricted their movement

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Visits to Supermarkets and Grocery Stores



COVID-19 **OUTBREAK**

On Mar 10, schools were temporarily closed, and on Mar 12, COVID-19 Alert System was moved to Code Red sublevel 2. On Mar 16 enhanced community quarantine measures were announced.

COVID-19 **RESPONSE**

With schools closing, movement to stores reduced, but as stricter measures on public movement were announced on Mar 16th, people went out to get food and grocery essentials. This peak was witnessed for a few days till the President announced stricter measures of social distancing and dire consequences for violators.

App Usage Skyrockets



Image and Video editing apps **see an 80% surge** in usage



Gaming app **usage grows by 30%**, especially games involving Strategy



Books and Comic apps see **75% growth**



Communication app activity **shoots up by 120%**



App traffic to Finance Apps has **increased by 100%** due to stock market volatility



Music apps witness a **350% growth in usage**.

MALAYSIA



The Changing Consumer Behavior: Footfall. App Usage

As more cases are reported, Malaysians find themselves in new and unique situations with a sudden mandatory home quarantine declared in effect from March 18 – April 14.

+410%

Visits to Hospitals
jump

As the number of cases in Malaysia increase quickly, more people visit hospitals for treatment or to diagnose their symptoms, putting an unprecedented load on the medical system.

+148%

People actively
shop for daily
essentials

148% increase in visits to supermarkets, grocery and convenience stores is seen in the second half of March as number of cases in Malaysia rapidly rises.

+200%

Increase in Book
app usage

Activity on book publishing and reading apps saw a sudden increase as people find new ways to keep themselves and their families engaged as the country comes to a standstill.

+42%

Finance app usage
increases

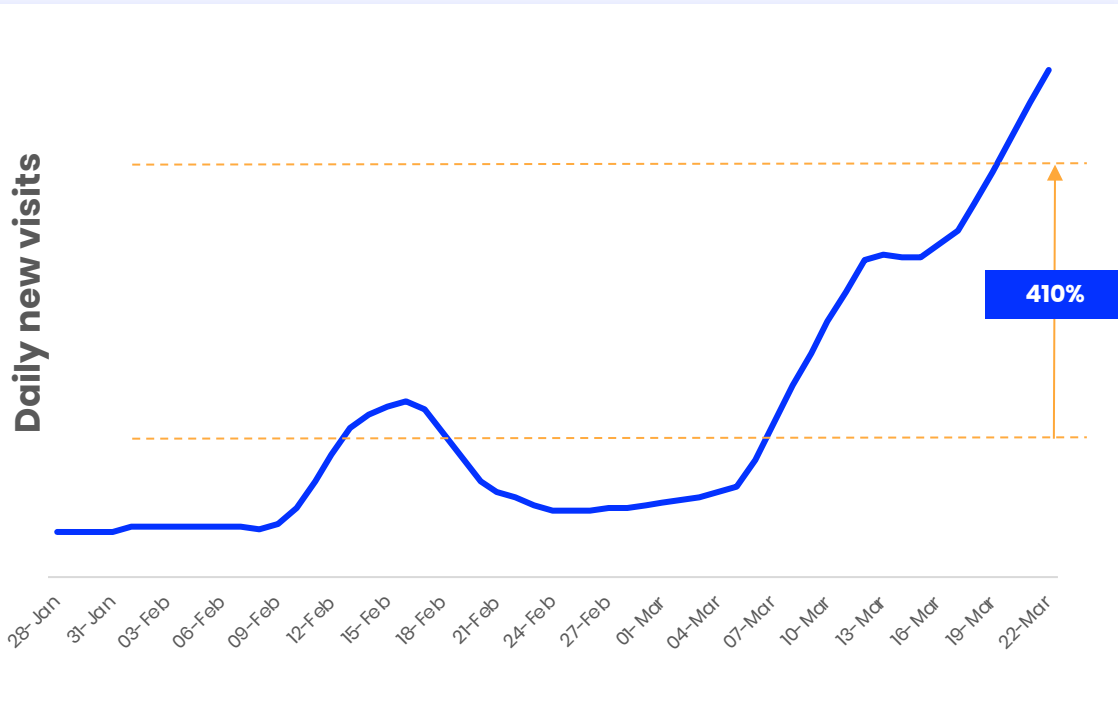
Apps that track the stock market, saw a quick jump in usage especially over the weekdays and fell on weekends. With market fluctuations, more people turned to such apps to keep track of their investments.

+70%

Gaming app surges
as people stay at
home

On suddenly finding themselves at home in Mandatory Home Quarantine, Malaysians are playing more games to keep themselves entertained.

Hospital visits witness a record high as reported cases increase drastically



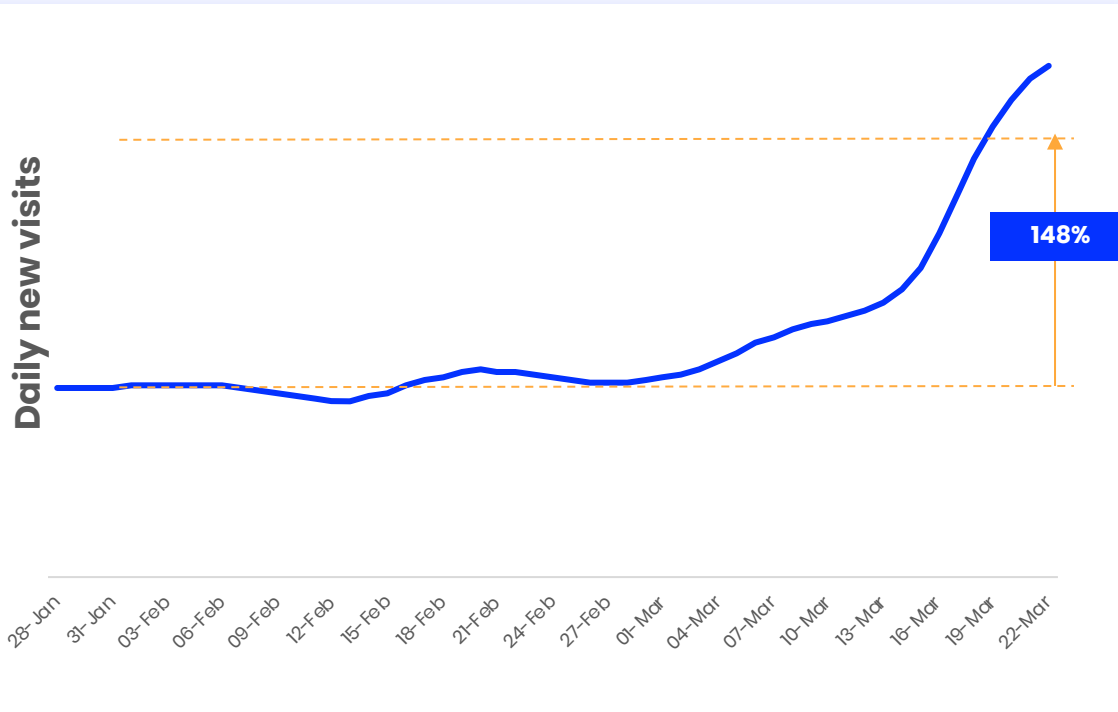
COVID-19 **OUTBREAK**

This rise in visits to hospitals aligns with the sharp increase in COVID-19 cases in Malaysia.

COVID-19 **RESPONSE**

As the number of cases in Malaysia shot up quickly, more people started visiting hospitals either for treatment or to get checked for symptoms.

Supermarket, Grocery and Convenience store visits shoot up as panic kicks in



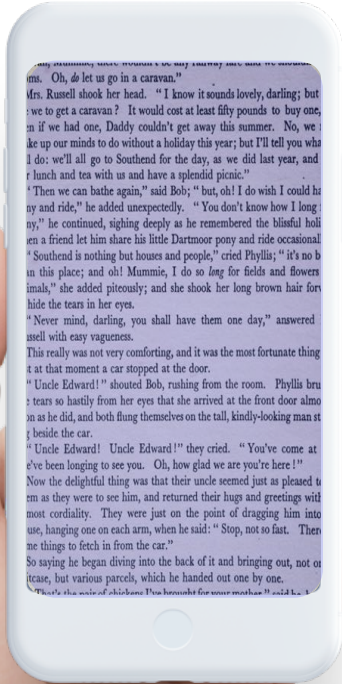
COVID-19 **OUTBREAK**

On March 16, a nationwide home quarantine is enforced beginning March 18 till March 31st. Confirmed cases exceed 500.

COVID-19 **RESPONSE**

With little time to prepare for the strict home quarantine, people rush to stores in order to stock up on daily essentials, food and groceries. This continues to increase well into the 3rd week of March as more people find themselves unprepared to remain home for extended periods of time with little at hand.

App Usage Skyrockets



Finance app activity shoots up by 42%



Gaming app usage grows by 70%, especially games involving Strategy



Books and Comic apps see 250% growth



Social app activity shoots up by 45%



Productivity apps witness a 55% surge in usage.



Communication apps witness a 900% surge in usage.

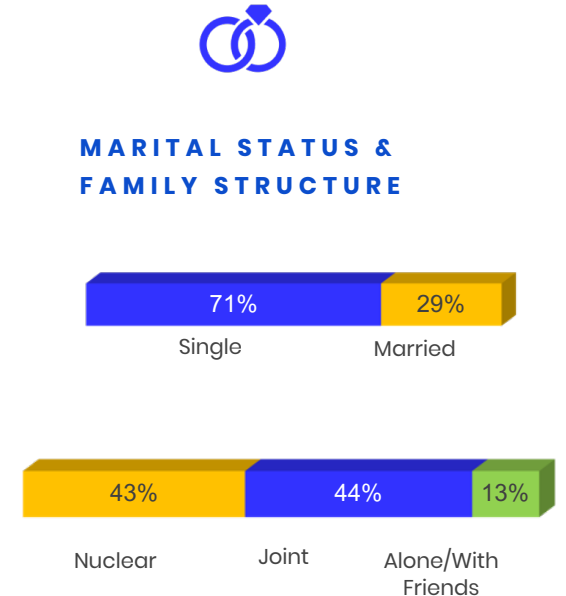
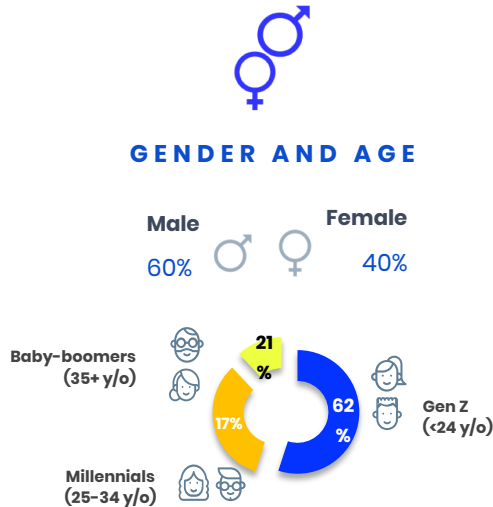
INDONESIA

An aerial night view of a city skyline, likely Jakarta, Indonesia. The image shows numerous skyscrapers and buildings illuminated with lights, set against a dark blue twilight sky. The city lights create a vibrant contrast with the dark background. The word 'INDONESIA' is overlaid in large white letters on the left side of the image.

Profile of Survey Respondents

The survey was conducted on the **InMobi Pulse** platform and a total of 1056 unique and valid responses were collected.

The following is the demographic profile of the respondents.



Consumer Sentiment: Awareness. Understanding. Expectation.

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



80%

Misinformation Abound

80% 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.



14%

Poor Understanding of Symptoms

Only 1 in 10 Indonesians survey 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.’



60%

Social Distancing for a Majority

Only 60% of citizens are taking social distancing seriously and avoiding public gathering and human contact.



58%

The World Economy is in Deep Trouble

~6 in 10 consumers believe all leading economies including Indonesia will be affected, while 25% believe that the world is heading for recession.



66%

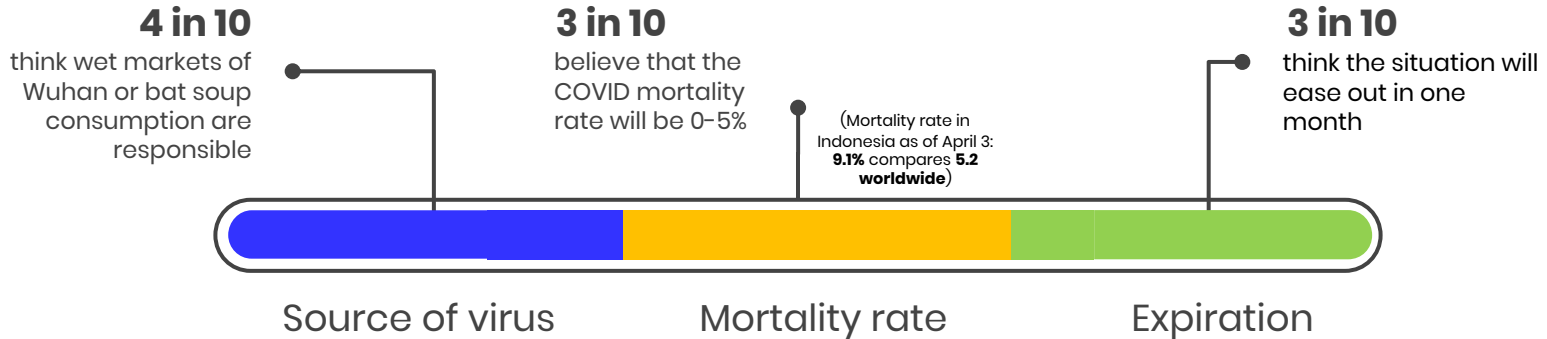
Expect Losses in their Industry

~7 in 10 survey respondents expect losses in their industry, with 12% expecting layoffs.

What do Indonesians know about COVID-19?

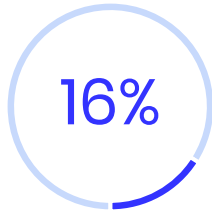
Even though the world is grappling with Coronavirus, there is limited understanding of cause and effect

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



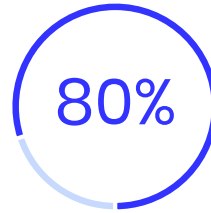
What are Indonesians doing to stay healthy and safe?

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



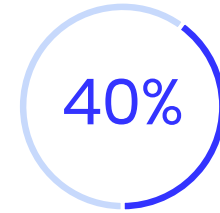
Very satisfied with Government measures

Only 1 in 10 citizens were very satisfied with the measures taken by the Government towards Corona-Virus prevention and treatment



CANNOT identify all Preventive measures

Only 2 in 10 citizens listed all four preventive measures as listed by WHO guidelines - avoiding public gathering, regular handwashing, sanitization, and covering mouth while coughing as preventive measures.



NOT Practicing strict Social-Distancing

Almost 4 in 10 are still not practicing social distancing. Interestingly, women are more likely than men to follow social distancing.

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

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



23%

Schools shutdown, but no WFH

2 in 10 consumers are facing situations where their workspace continues as usual or their work does not make WFH possible, leaving them more vulnerable.



35%

Scarcity of Sanitizers & handwash

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



73%

Change in spending behavior

Three-fourths of the consumers are increasing or decreasing spends on certain aspects of their regular lifestyle.



12%

Scarcity of food essentials

1 in 10 survey respondents are facing challenges in sourcing food essentials

Changing Behavior: Preference. Shopping. Footfall.

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

A circular infographic with a blue border and a light blue background. The number '24%' is centered in blue. A small blue arc is at the top of the circle.

24%

Hoarding up on essentials

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

A circular infographic with a blue border and a light blue background. The number '77%' is centered in blue. A small blue arc is at the top of the circle.

77%

Quality over Price in times of crisis

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

A circular infographic with a blue border and a light blue background. The number '32%' is centered in blue. A small blue arc is at the top of the circle.

32%

Limited eating out/ordering in

~3 in 10 consumers have reduced or completely stopped eating out or ordering food at home. Cooking at home is on the rise.

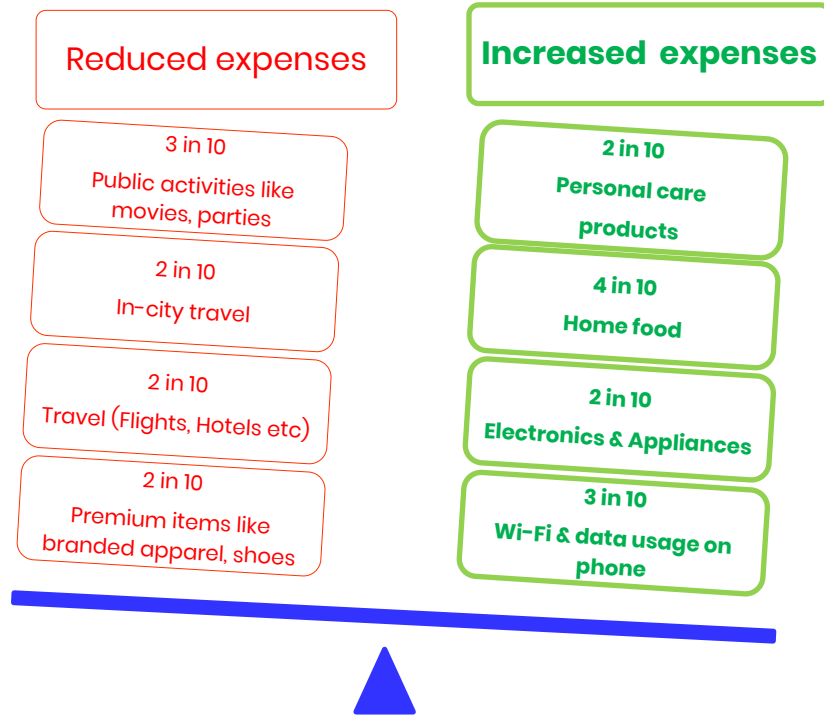
A circular infographic with a blue border and a light blue background. The number '6%' is centered in blue. A small blue arc is at the top of the circle.

6%

Placing orders online

Despite challenges in procuring essentials in-store, people are not turning to online shopping apps to make purchases.

How has shopping behavior changed?



Hoarding behavior has not kicked in

- **38% have stocked up** on groceries enough for a few days only.
- **43%** have not changed their grocery/household buying behaviour, and expect the situation to be fine within a week.

Quality is king in Personal care products

- **77% Indonesians rate 'Germ killing ability'** as the most important factor followed by brand, leaving Price at third position.

Healthy food consumption on the rise

- **86%** have changed their food consumption habits.
- **23% and 9%** have stopped eating out, ordering in respectively.
- **24%** have started cooking at home.
- **35%** have started taking nutrient supplements.

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 – 1056. Survey dates: March 24-28

The Changing Consumer Behavior: Footfall. App Usage.

As more cases are reported, Indonesians take some time to adjust to new realities, reschedule travel plans and reduce stepping out.



Jakarta airport witnesses slump

A 35% decrease in footfall traffic is witnessed in Jakarta airport after mid-March, as the government advises against non-essential travel and visa restrictions are placed.



People actively reschedule travel

Over 500% increase in use of travel apps is seen in March as travel restrictions are placed and people actively try to reschedule/cancel their flights and ask for refunds.



Decrease in recreation plans

People actively reduce going out to restaurants, movie theatres and shopping areas as advisories are issued and malls reduce timings.



Hospitals and clinics continue to see reduced visits

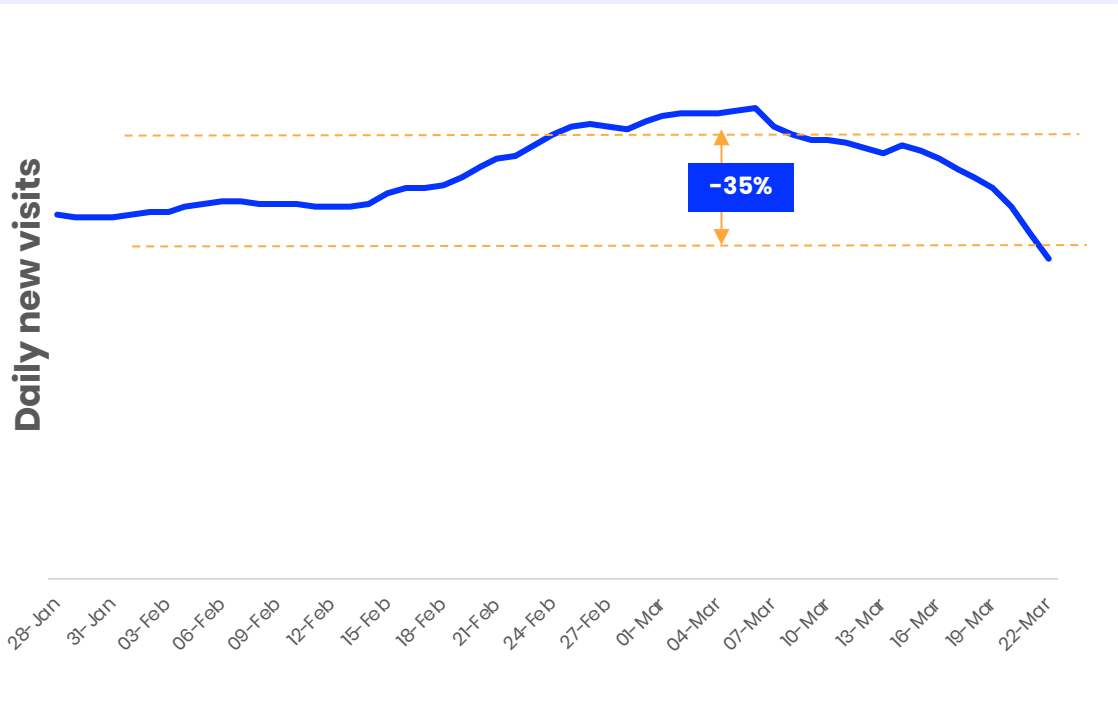
As number of cases increase, while the number of people going to hospitals reduces, it does not decline at the rate expected as confirmed cases are brought in and others flock to get tested.



People cancel vacation plans

Outside of Jakarta, people cancel their vacation and travel plans and an immediate decline in footfall to these airports is seen.

Jakarta airport visits stumble in response to travel advisories and bans



COVID-19 **OUTBREAK**

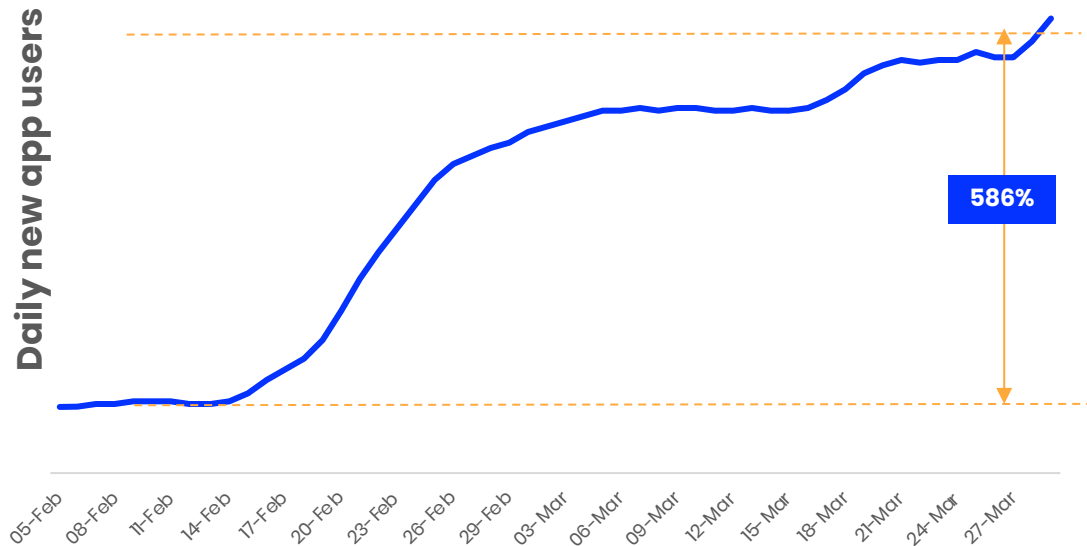
On March 17th a travel advisory is announced asking Indonesians to avoid non-essential travel. As the situation in China gets worse, Indonesians fly in from elsewhere.

COVID-19 **RESPONSE**

In response to the travel advisory and popular travel apps announcing refunds for flights, people start cancelling plans to fly out of Jakarta. With visa restrictions in place by March 18th, incoming flights also reduce, impacting foot traffic at the Jakarta airport.

Travel app usage rises exponentially as consumers track reschedule or cancel travel plans

Daily new app users



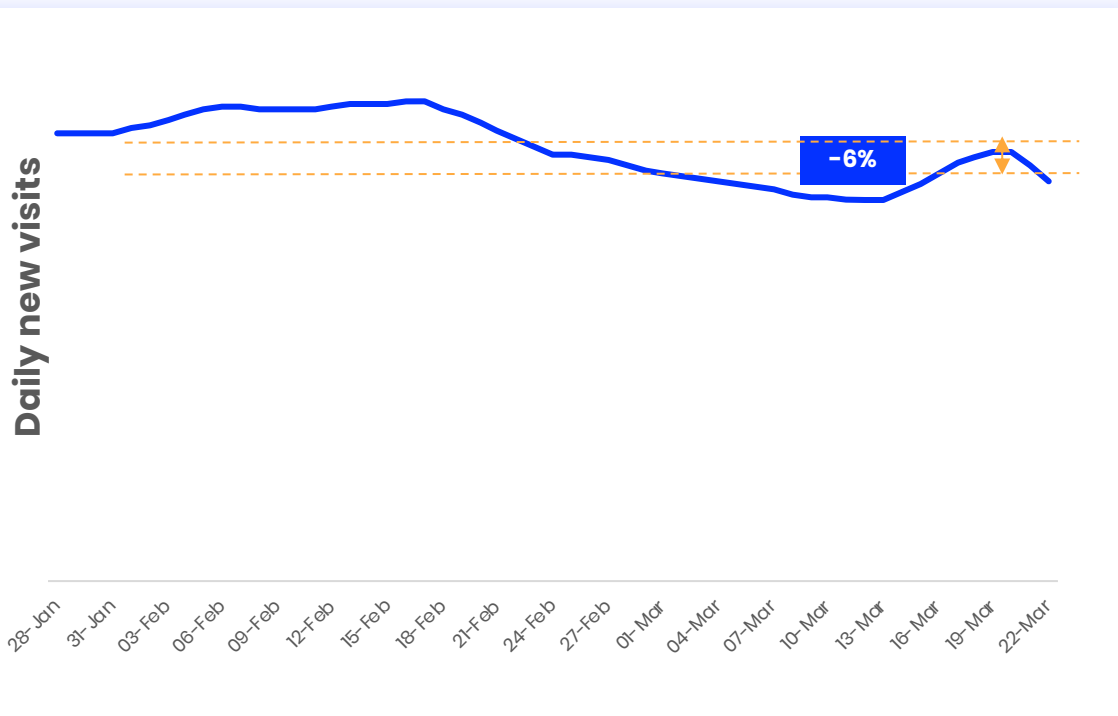
COVID-19 **OUTBREAK**

By mid-March, the number of cases rapidly increase in Indonesia and elsewhere in the world, causing panic amongst people.

COVID-19 **RESPONSE**

As travel advisories are issued, people flock to travel apps to reschedule or cancel their flights. Additionally popular travel apps announce refunds and waiver of cancellation/rescheduling fees, discouraging people from flying amidst a global pandemic.

Hotel visits across Indonesia dip



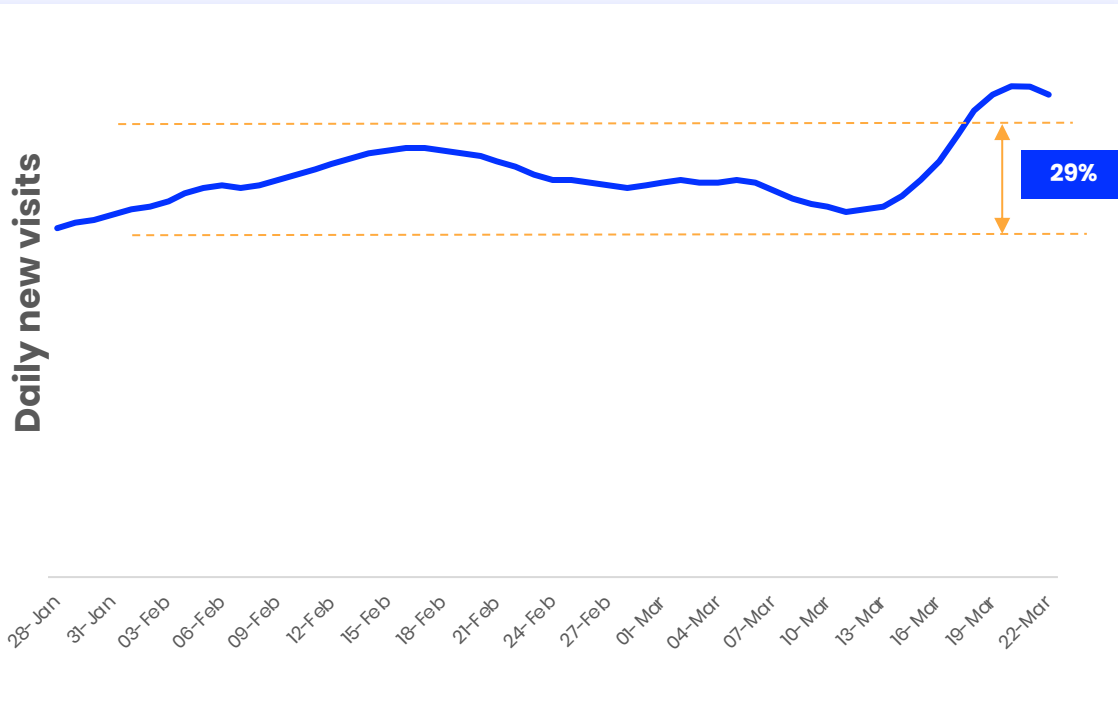
COVID-19 **OUTBREAK**

Worldwide and in Indonesia events, conferences and vacations are cancelled.

COVID-19 **RESPONSE**

As early as March 6th, hotel occupancy rates see a sharp decline. While those already in hotels, find ways to get back home and reschedule their flights, incoming visits to hotels decline quickly as fewer people fly into Indonesia.

Hotel visits in Jakarta and West Jawa double down as quarantine houses for the affected



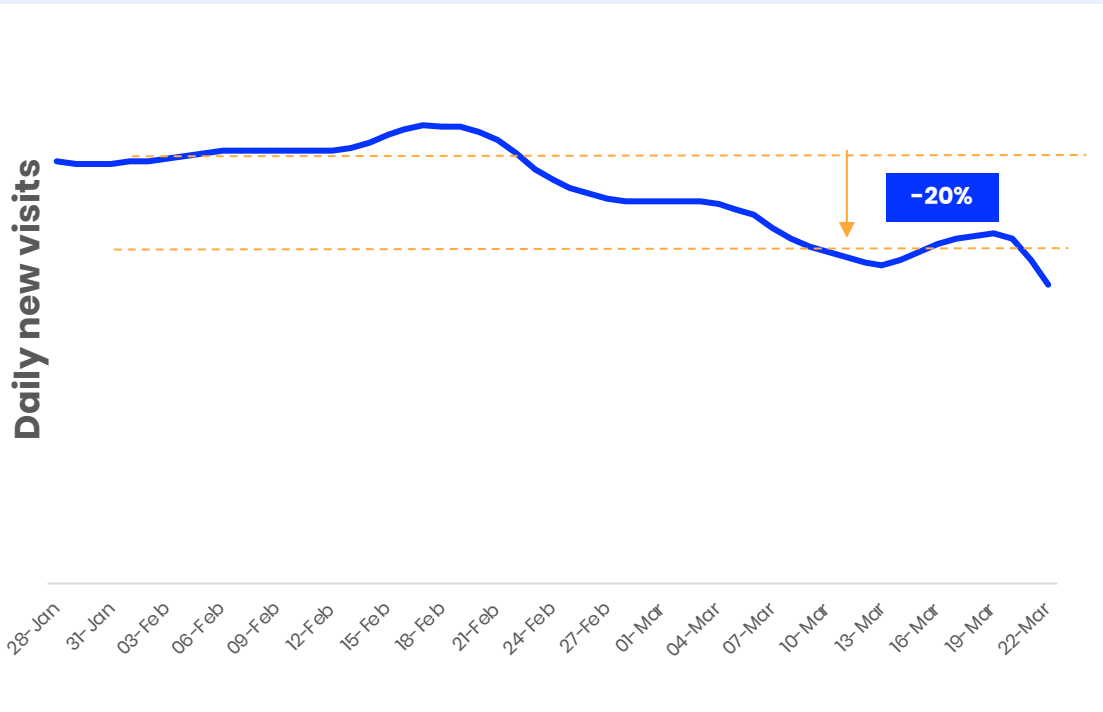
COVID-19 **OUTBREAK**

Worldwide and in Indonesia events and conferences begin getting cancelled.

COVID-19 **RESPONSE**

As early as March 6th, hotel occupancy rates see a sharp decline. Jakarta is one of the worst hit areas and sees the sharp decline in footfall. However, as more cases are reported, hotels are used to house medical staff after their shifts and quarantine infected patients.

Shopping malls and centers dips as citizens become aware of social distancing



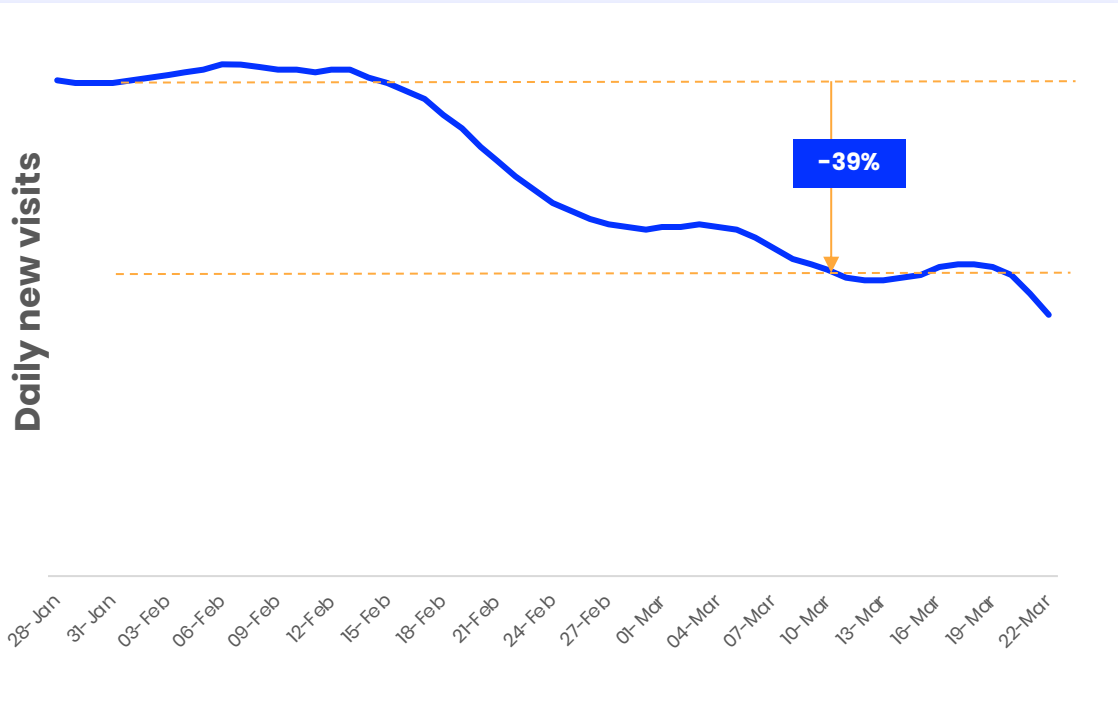
COVID-19 **OUTBREAK**

Despite new cases being reported everyday, while there is a steady decline in visits to shopping malls, people are still venturing out.

COVID-19 **RESPONSE**

In late March as things heated up, malls reduced their timings and more advisories against venturing out of the house were announced, people reduced their visits to shopping areas, but have not completely stopped.

Visits to Restaurants nosedives as reported cases peak beyond 500



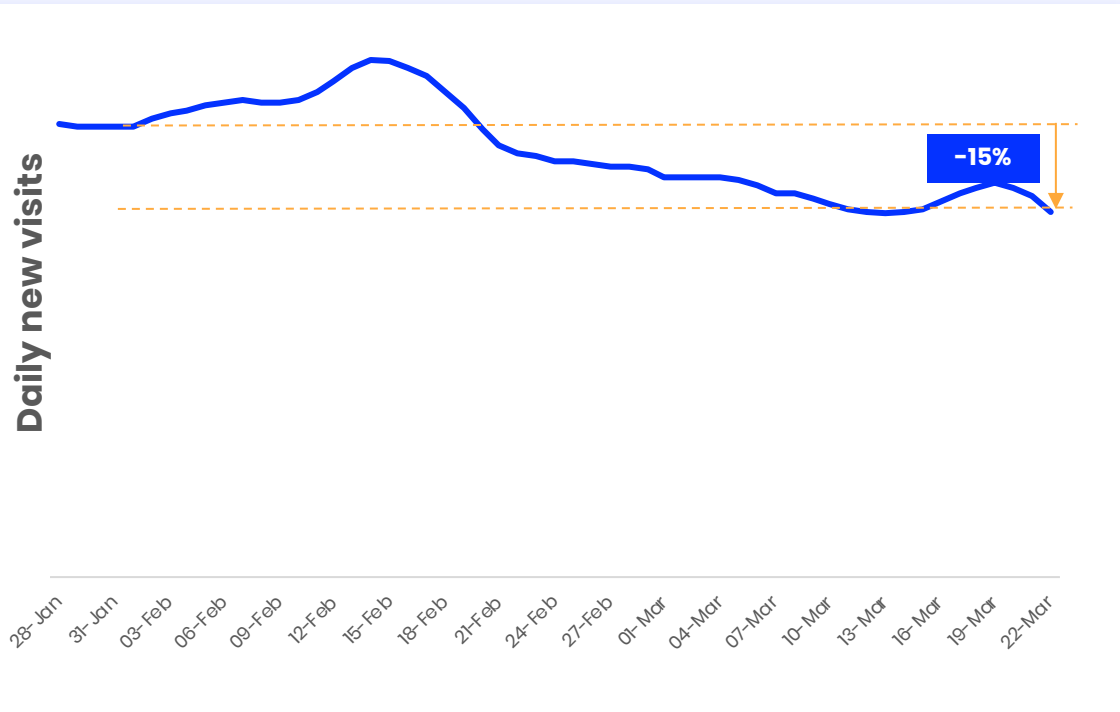
COVID-19 **OUTBREAK**

A sharp decline can be seen by mid-Feb when cases in China explode and the world started taking more notice.

COVID-19 **RESPONSE**

Visits to restaurants took a drastic nosedive by the end of March as the number of cases crossed 500 and the government actively encouraged people to avoid public spaces.

Visits to Movie Theatres sees a slump with aggressive advisories on social distancing



COVID-19 **OUTBREAK**

By March 22nd Indonesia had over 500 cases, WHO had declared it a pandemic and was aggressively advising social distancing.

COVID-19 **RESPONSE**

As people started avoiding public spaces, visits to movie theatres declined as well by the end of march.

App Usage Skyrockets

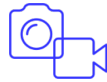
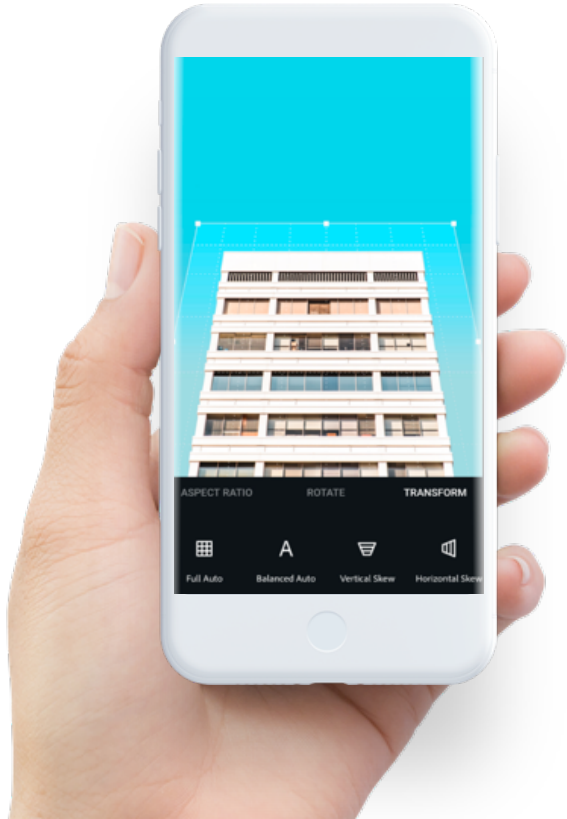


Image and Video Editing apps **see a 500% surge** in usage



Gaming app usage **grows by 50%**, especially games involving Strategy



Books and Comic apps **see 64% growth**



Social app activity **shoots up by 60%**



Productivity apps witness a **100% surge** in usage

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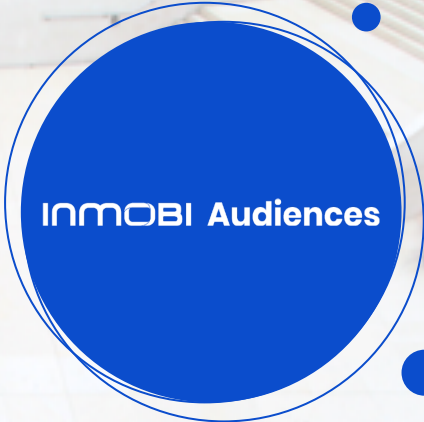
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