

INTAGE India Report

COVID 19 Impact on Our Lifestyle: Adapting to the “Unlock” and “New Normal”

September, 2020



Table of contents

About the survey	3
Summary of the survey	9
Detailed Findings	
<i>How has consumer behavior changed during 'Unlock' phase?</i>	15
<ul style="list-style-type: none">• Basic Safety remains a key priority for consumers• Interest in well-being has become another key practice• Females are exhausted from household work	
How will consumers change in the phase of 'New Normal'?	34
<ul style="list-style-type: none">• Basic Safety and Well-being continue to be a trend to improve quality of life• Consumers are eager to have fun and socialize	
How will shopping behavior/Usage of services change?	43



About the Survey

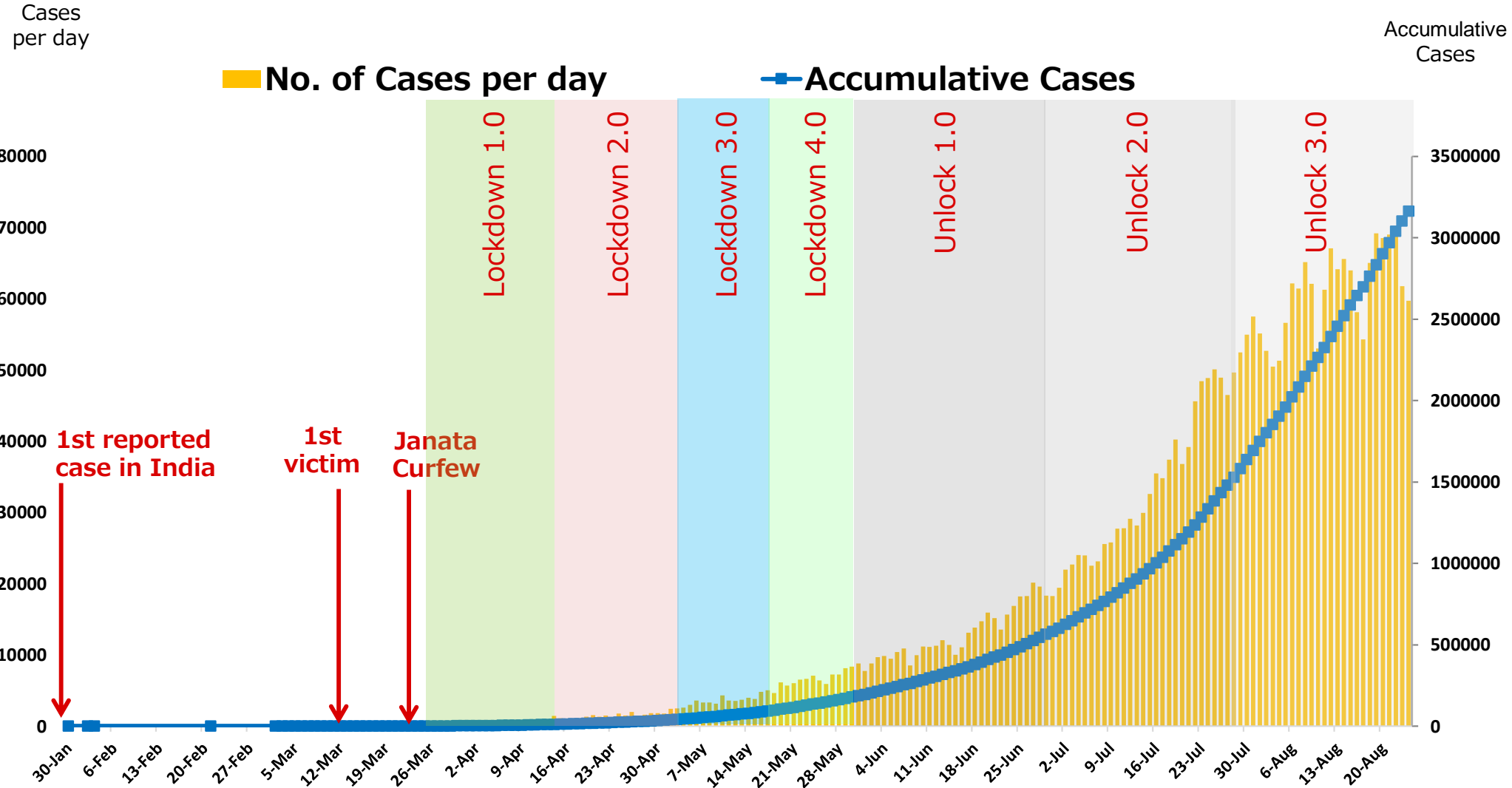
Introduction

- The entire world has seen the disaster created by the 'Noble Corona Virus'
- India as a country is not an exception and at present, it stands at the 3rd position with almost more than 4 million coronavirus cases till date (approx. 70K reported deaths) as of the end of August 2020.
- The lives of people suddenly came to a standstill position due to nationwide lockdown and a sudden complete change in perspective of leading a life was observed. However, life never comes to a standstill position for long. Like all other countries, the nation is trying to bring back the normal lifestyle with certain restrictions in the phase by phase manner. People have started coping-up with the situation and are trying to adopt 'new normal' lifestyle.
- We have to live with the reality of COVID-19 for longer period, therefore the journey is from NORMAL → Lockdown → Unlock Phases → NEW NORMAL.

INTAGE India has undertaken a survey across India in order to capture the journey of consumers with facts and figures as well as their emotional reactions in this regard - how our society would be changing during the unlock period and the new normal life in the future.

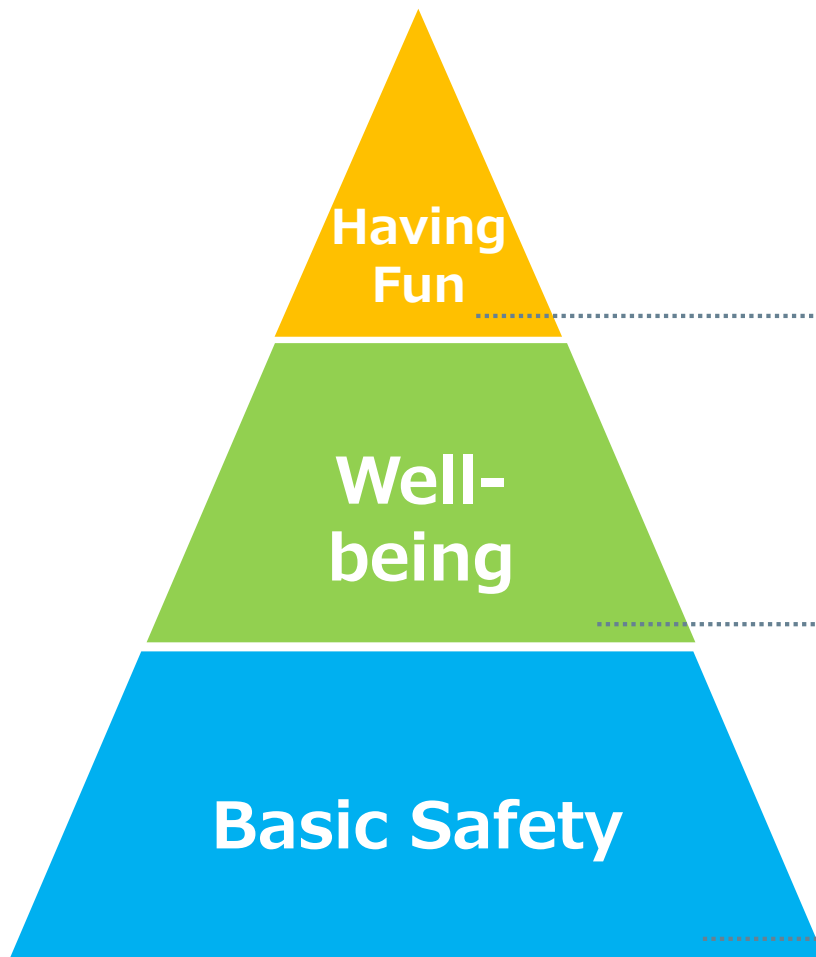
We conducted the 1st phase of our survey in April 2020 (during lockdown) and have conducted the 2nd phase (during unlock) to assess and forecast the situation.

The number of COVID 19 cases



Research Objective

This survey is aimed at understanding how Indian consumers have been changing after the pandemic and adopting themselves during 'unlock period' and then into the 'New Normal' era. To achieve this objective, we analyzed the consumer attitude and behavior from the needs structure view point i.e. 'Basic Safety', 'Well-being' and 'Having Fun' as shown below.



In order to make our life positive, rich and colorful, something "fun" must be needed, however, it is missing in our current life. After basic safety and well-being are fulfilled, people should start looking for a fun.

Well-being means interconnected dimensions of physical, mental and social health and happiness, that extend beyond just basic safety. Particularly in India, social connections are an essential element of life and happiness, however it is also significantly affected by many restrictions. This should be the next focus after people are free from the infection.

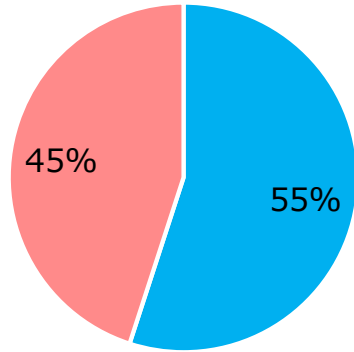
Needless to say, reducing the risk of COVID19 infection is a top priority under the current circumstances. People are forced to change their lifestyles in order to minimize the risk of infection. It makes us feel more stressed.

Survey outline

Methodology	<ul style="list-style-type: none">• Online survey through a structured questionnaire• Online questionnaire link was developed by INTAGE India and shared with consumers across India using internal database/connections
Target	<ul style="list-style-type: none">• No respondent criteria
Area	<ul style="list-style-type: none">• India (Nationwide)
Key Information Area	<ul style="list-style-type: none">• Overall reaction on the current situation• How to spend time during the lockdown/Unlock• Changes in shopping behavior during the lockdown/Unlock• Changes in life in the future after the lockdown is lifted
Interview Length	<ul style="list-style-type: none">• Approx. 20 minutes (Approx. 40 questions)
Timing	<ul style="list-style-type: none">• Phase 1: 16th April - 24th April, 2020• Phase 2: 19th July - 17th Aug, 2020
Collected sample	<ul style="list-style-type: none">• Phase 1: 546 samples• Phase 2: 555 samples

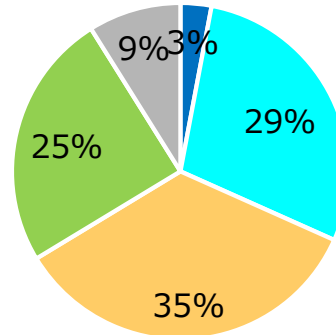
Respondent Profile

Gender



Male Female

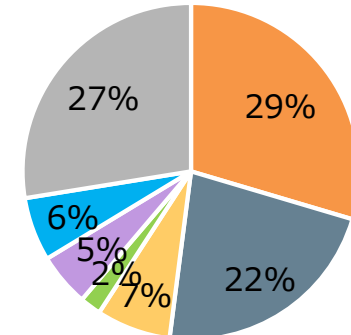
Age



Below 20 years 20-29 years
30-39 years 40-49 years
50 years or older

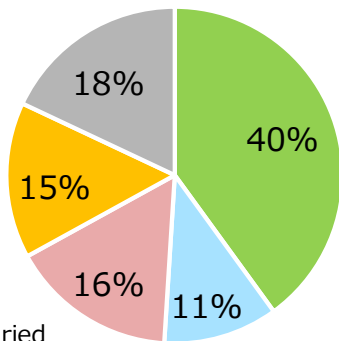
Area

Base - All (555)



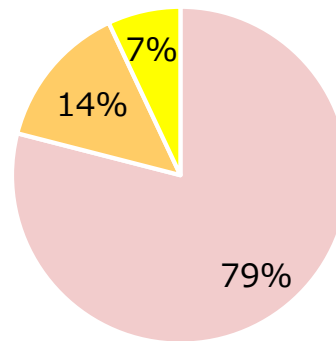
Delhi NCR Mumbai Bangalore
Hyderabad Chennai Kolkata
Other Cities

Occupation



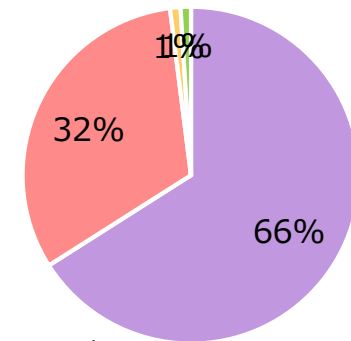
Salaried
Business/ Self-Employed/ Professional
Housewife
Students
Others

SEC



SEC A SEC B SEC C

Marital Status



Married
Single/never married
Widow(er)/Divorced/separated
Don't want to respond

Note: Respondent profile is almost the same as phase 1 survey conducted in April 2020.



summary

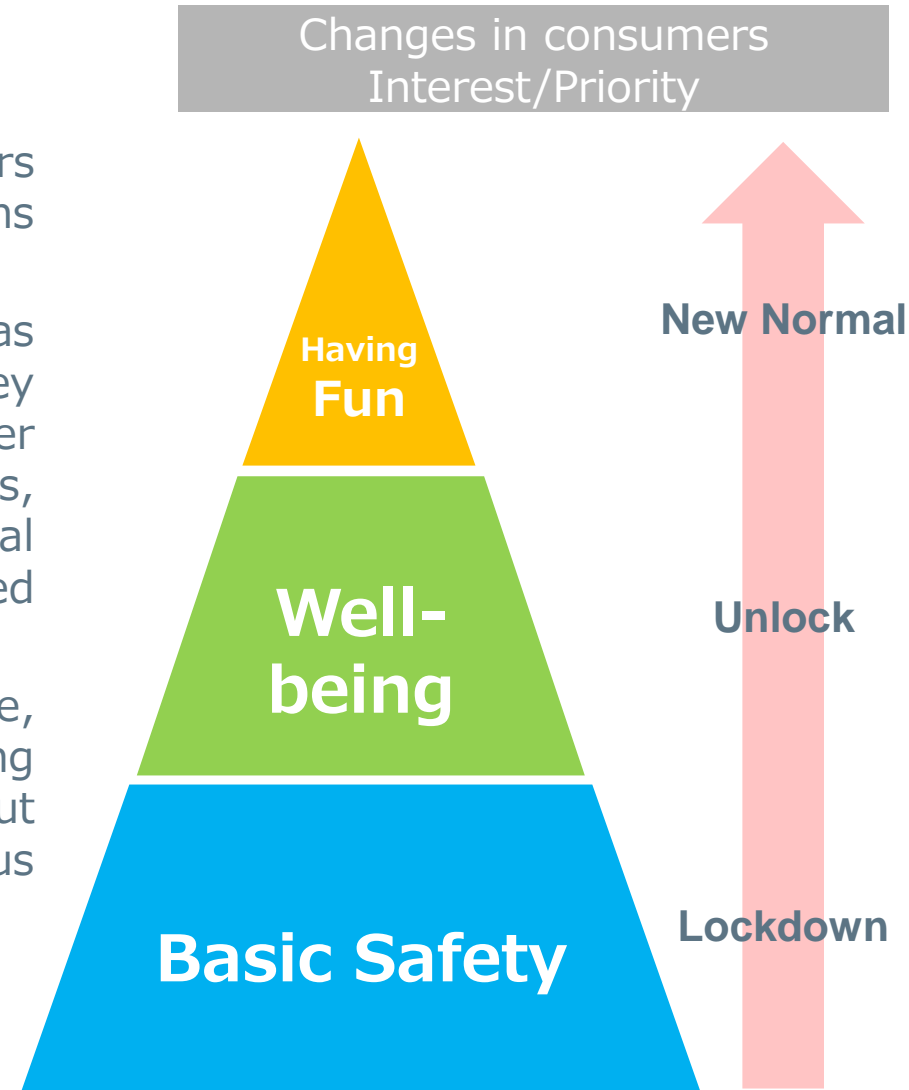
Summary of the Survey

Changes in consumers' interests

At the timing of August 2020, where consumers were adapting to the 'Unlock', Basic Safety remains a key priority of consumers.

Additionally, the interest in well-being has increased significantly comparing to the survey result in April 2020 and it has now become another key interest. Because of the many restrictions, consumers are facing difficulty to maintain mental health. Key concerns are about finances, restricted social activities and kids education.

In the future during the 'New Normal' phase, consumers would be eager to look for something fun, especially for activities which they can go out from home such as travelling, visiting religious places.



Key findings in the changes during 'Unlock' phase

Basic Safety

1 *Basic Safety remains a key priority for consumers*

Although the Government of India decided to 'unlock' many of the restrictions, people are well aware of the risk of infection after the unlock. Therefore they are trying to do everything which can reduce the chance of infection.

Wearing mask, using sanitizer and avoiding using public transportation have already become a habit among the consumers.

2 *Interest in well-being has become another key practice*

Financial uncertainty, lack of social connection and education for kids are the key challenges that people are currently facing. As a result, the key change in August survey is that almost all the negative feeling such as Stressed, Angry, Uncomfortable or Tired, have increased which could affect their mental health in a negative way.

As social connection is one of the most important aspect in life, they spend good time to maintain social connection with friends and family. When asked how to spend time, 'Catching up with friends/family by online tool' has increased significantly from April survey.

3 *Females are exhausted from household work*

Currently, most of domestic works are done by females themselves, although other family members are supporting them. Some of them used to get help from maids, but the majority is managing it without maid because of risk of infection. Additionally, work from home and study at home increased their workload as everyone is at home all the time.

While they have more workload, there are less opportunities to make them relaxed - extra work but no free time.

Well-being

Key findings in the changes in 'New Normal' phase

Basic Safety

Well-being

Having Fun

4 *Basic Safety and Well-being continue to be a trend to improve quality of life*

Basic Safety – immediate measure to reduce the risk of infection e.g. wearing mask, using sanitizer, avoid shaking hands will continue to be a habit.

Well-being – preventive measure and to improve the quality of life will be the next interest. As a prevention measure, people would try to enhance immunity by having good food and supplements.

One of the biggest concern among those who have kids is education. They will increase support for education to improve well-being as family.

5 *Consumers are eager to have fun and socialize*

Going out from home and socializing are the activities that consumers are really looking for. The following list shows the activities that people are currently missing which has increased by more than 10 points from April survey.

- Travelling
- Social gathering with friends & family
- Going out for Shopping - Malls, Market
- Watching movies in Multiplex
- Dining out
- Going to
 - religious places
 - park/garden
 - neighbourhood community centre

This is one of the biggest change comparing to the survey in April and should be the next trend in order to make their life positive.

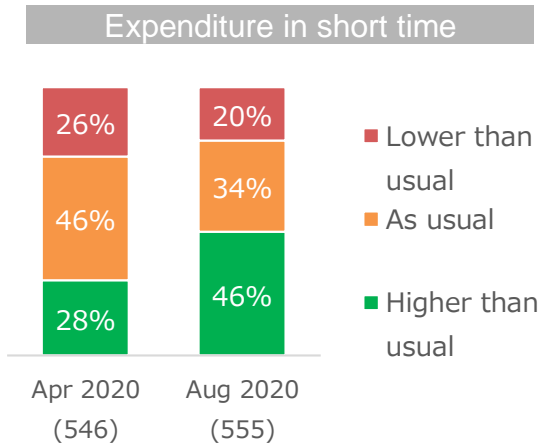
Changes in shopping behavior/Usage of service (1)

Consumers are ready to go out for shopping and spend money

During the lockdown period, people tried to minimize the risk of infection, therefore the frequency of shopping itself had decreased significantly, however, it has already returned to the previous levels i.e. the timing when there was no pandemic and we enjoyed freedom of movement.

Although majority of consumers have financial concerns in the future, almost half of respondent said they feel personal expenditure will be higher than usual in short term. They are ready to spend money for what make their life better and fun.

The key to attract the consumers during 'New Normal' is as follows.



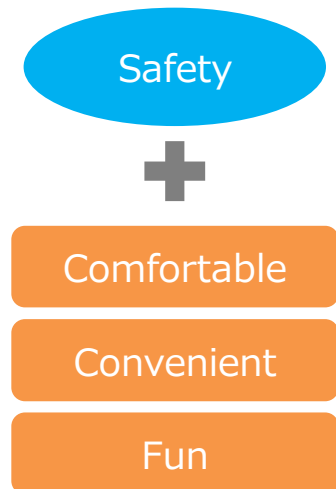
Product

Safety continues to be required for any product. Additionally, the items that make the life comfortable, convenient and fun must be with high potential demand.

Fitness accessories, furniture or appliance to reduce domestic works are examples.

This idea is not only for product category level but also items level as well. Even those who intend to buy a car in the near future will give more importance on those aspects.

It should be highlighted in product concept and communication to attract consumers.



Changes in shopping behavior/Usage of service (2)

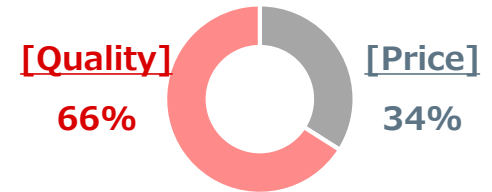
Price

Consumers focus on quality more than price.

The price must be the key as people try to minimize the expense to prepare for uncertain future. However, price is not everything. In fact, 66% said that quality is more important than price.

The way of selecting an item remains the same - 'Value for Money'. However, in the 'New Normal', what consumer mean Quality or Value may be changed. The aspects mentioned at Product "comfortable, convenient and fun" should be more focused on and those items provide value over the price.

Price or Quality?



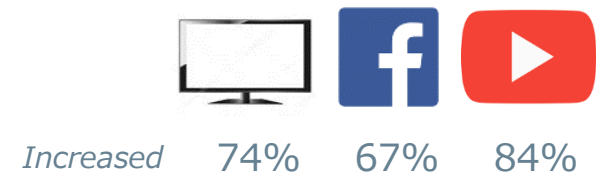
Promotion

TV, Facebook and Youtube are the key media

Approx. 70% respondents increased time to spend TV, Facebook, YouTube during lockdown/unlock phase.

It must be the key media to penetrate the consumers.

Time of spending various media

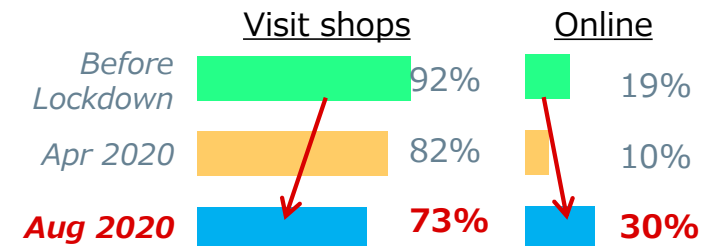


Place

Online shopping has got more popular than ever.

Even though the fact that visiting shops is still the most common way of shopping, online shopping is getting popular while the number of people who visit shops is getting lesser. This tendency is clearly observed among higher income and young age group.

Fresh Food - Shopping Channel

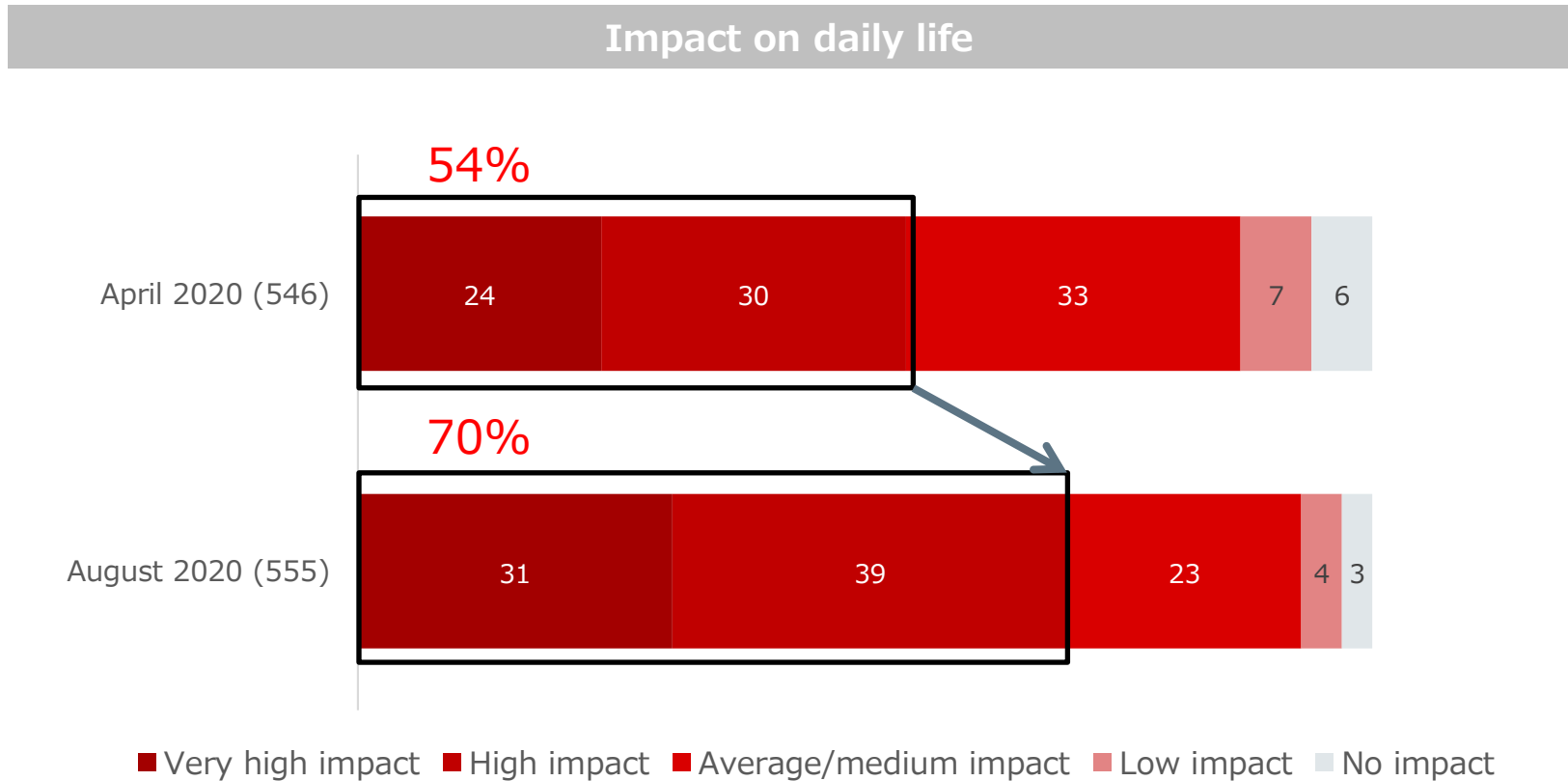




***How has consumer behavior
changed during 'Unlock' phase?***

COVID 19 continues to impact our life a lot

COVID 19 keep impacting the daily life as almost all the respondent said that it impacted them to some extent. Comparing to the survey in April 2020, the number of those who said 'Very high impact' or 'High impact' have been increased significantly.



Q. To what extent COVID-19 - has impacted your or your family's life?

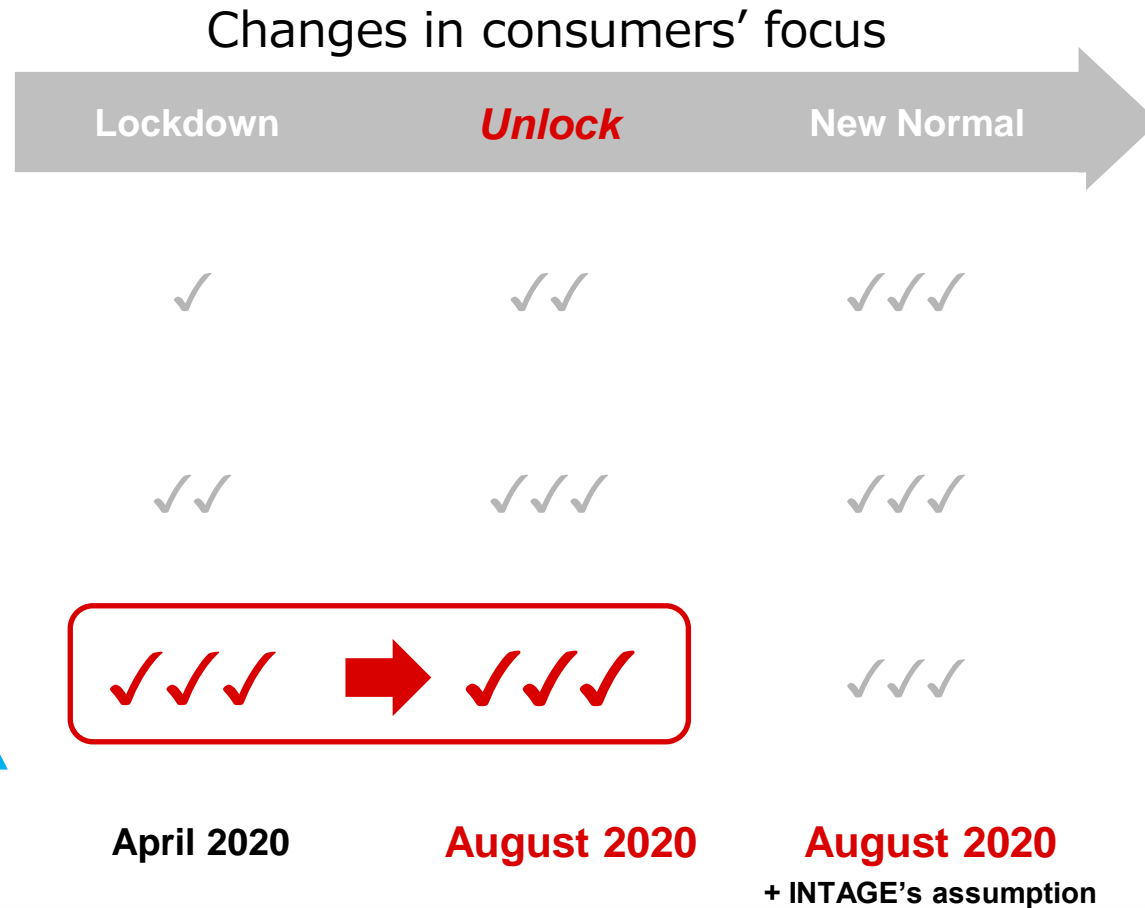
Key Findings 1:

Basic Safety remains a key priority for consumers

The number of "✓" means level of interest/concern in each aspect in each timing.



Timing of survey



Consumers' voice - Fear of the infection



“Going out for Day to day work with **high risk as Covid cases are rising day by day**” (Male, 25 years, Delhi)

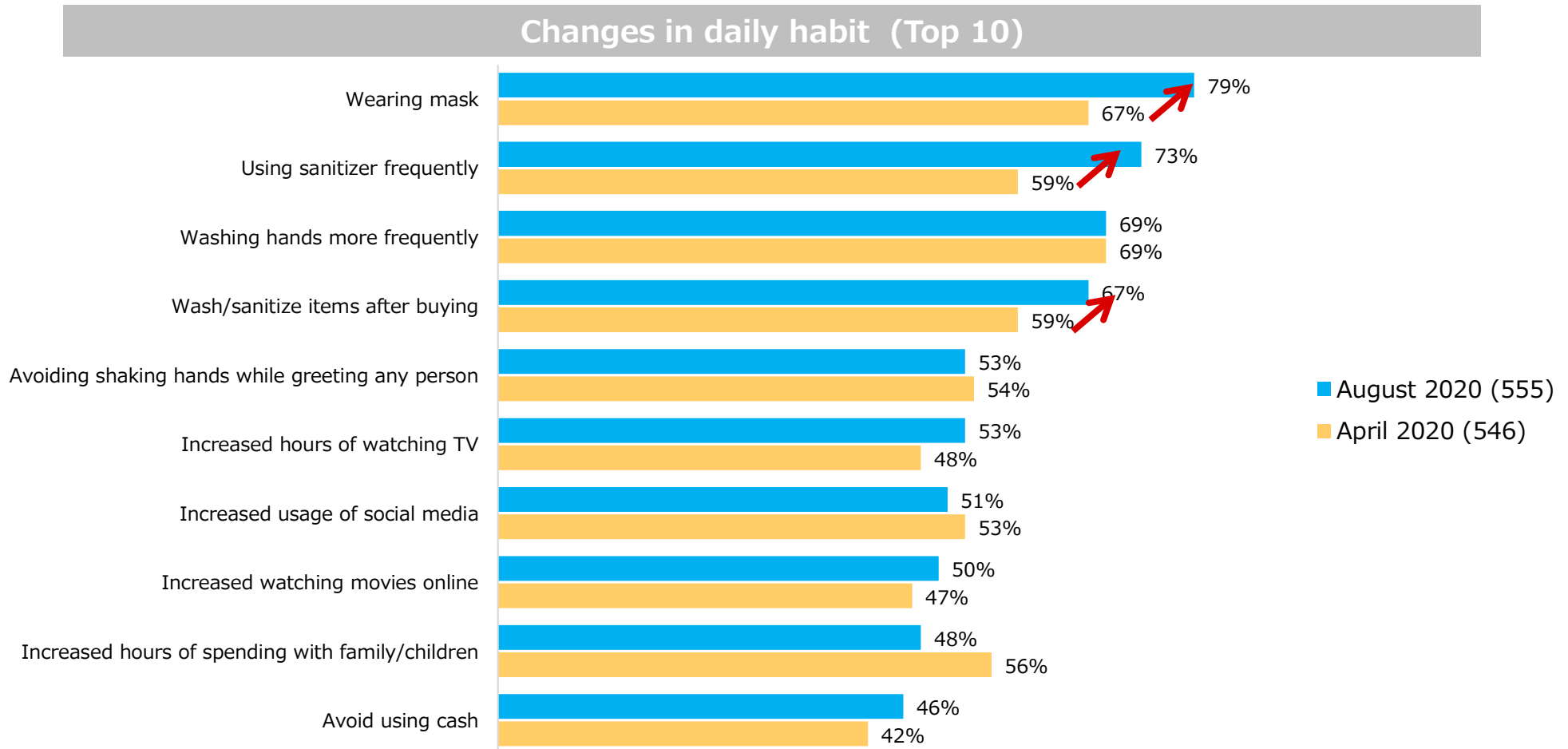
“The biggest **challenge is to keep ourselves safe and secure from the pandemic**. As a shop owner, I must keep myself healthy because of my illness many people would be affected.” (Male, 54 years, Delhi)

“The biggest challenge during current situation is to maintain social distancing because here **people are still not following proper distancing** and we have to do such daily needs odd jobs like milk vegetables etc. at those place **proper distancing is still not followed by all people.**” (Female, 29 years, Bikaner)

I am **worried about immunity** because if your Immunity is low, you have **higher chance of infection** so it is big challenge for me to take care of it like wash hand regularly and take other precautions while going out. (Female, 35 years, Mumbai)

Measures to avoid infection has become a habit

People are trying to do everything they can in order to avoid the infection. After the survey in April, more people have started wearing mask and use sanitizer frequently and it has become a new habit.



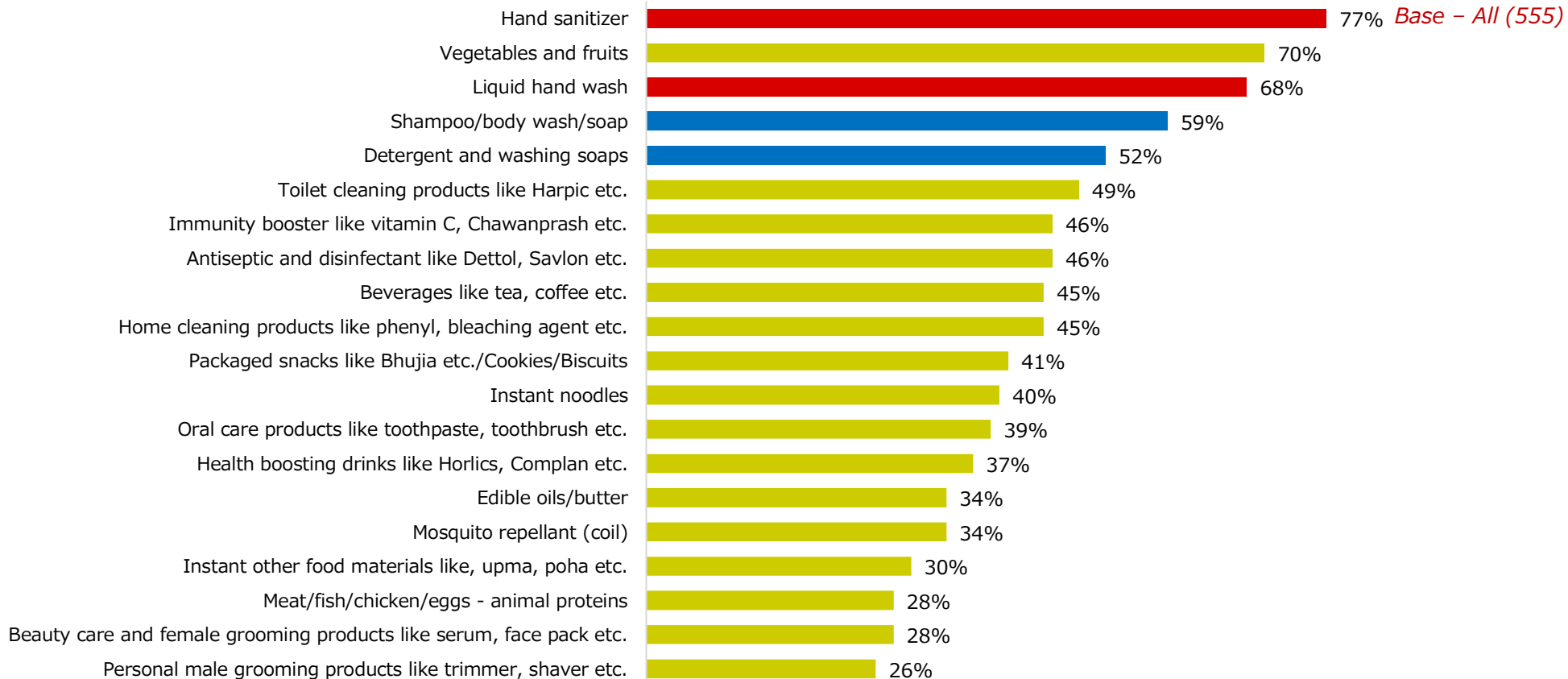
Q. How your daily habit has been changed as compared to before lockdown period.

People consumed/purchased hygiene items more post lockdown

Among top three items people consumed or purchased more than before, two of them are hygiene related items – Hand Sanitizer and Liquid Hand Wash. People continue using it more than before.

Usage of shampoo/bodywash/soap as well as detergent/washing soap have also been increased as consumers might take shower and do laundry more frequently.

Product consumed/purchased more during post lockdown



Q. Out of the below mentioned products, which all are now consumed/purchased more in your household during this 'new normal' phase (post lockdown)?

Consumers try to avoid public transportation

After the lockdown has started, people started avoiding public transport and prefer to use their own vehicle or walk.

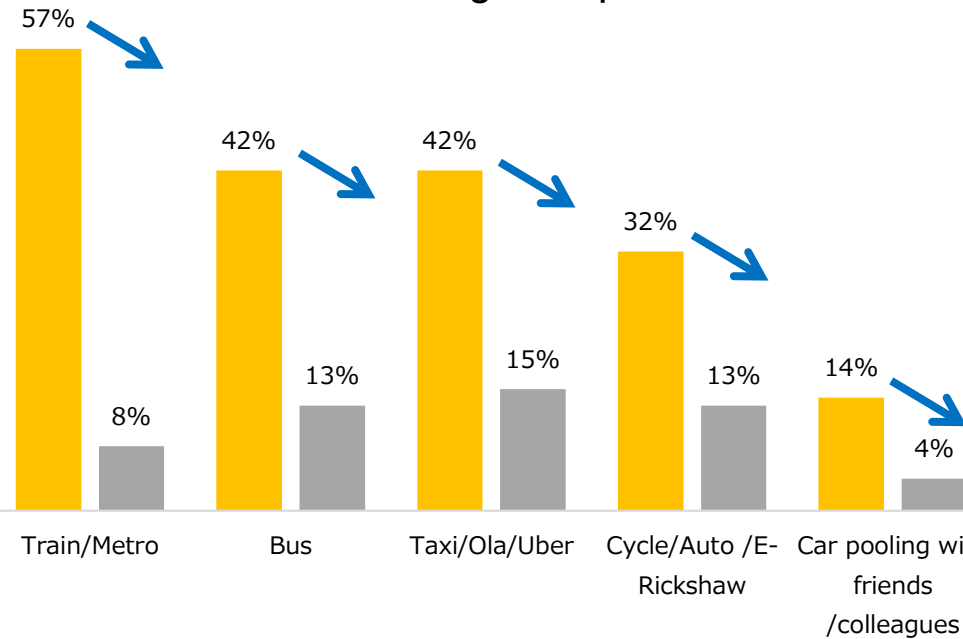
Mode of transportation before/after the lockdown

■ Mode of Transport - Before lockdown

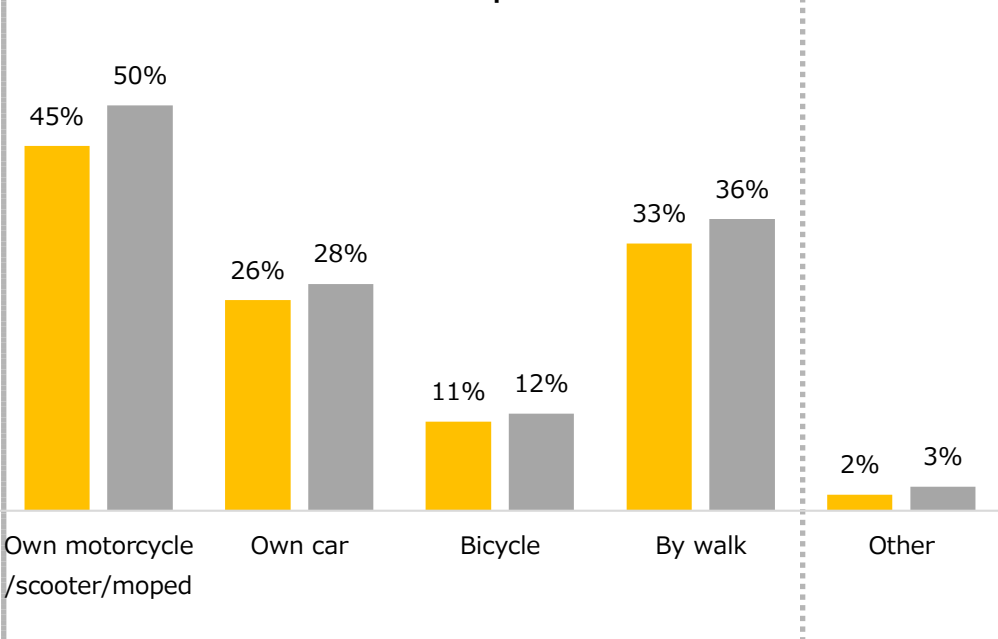
■ Mode of Transport - After lockdown/Unlock phase

Base – All (555)

Public/ Sharing transportation



Personal transportation



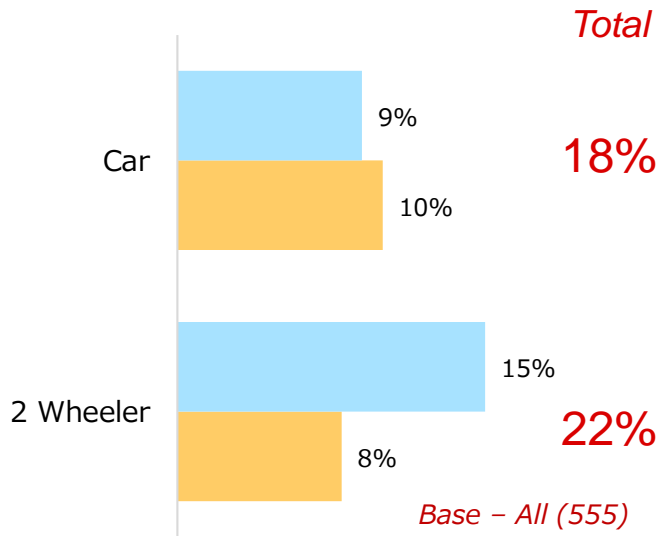
Q. Before the lockdown period, what was the mode of transport you usually use?

Q. And Once the lockdown period is over, what will the mode of transport that you are planning to use?

Reason of owning a car is to reduce the risk of infection

18% already bought or plan to buy a car in next 6 months. It is 22% for 2 wheeler. Main reason of the purchase is, fear of the infection when using public transportation.

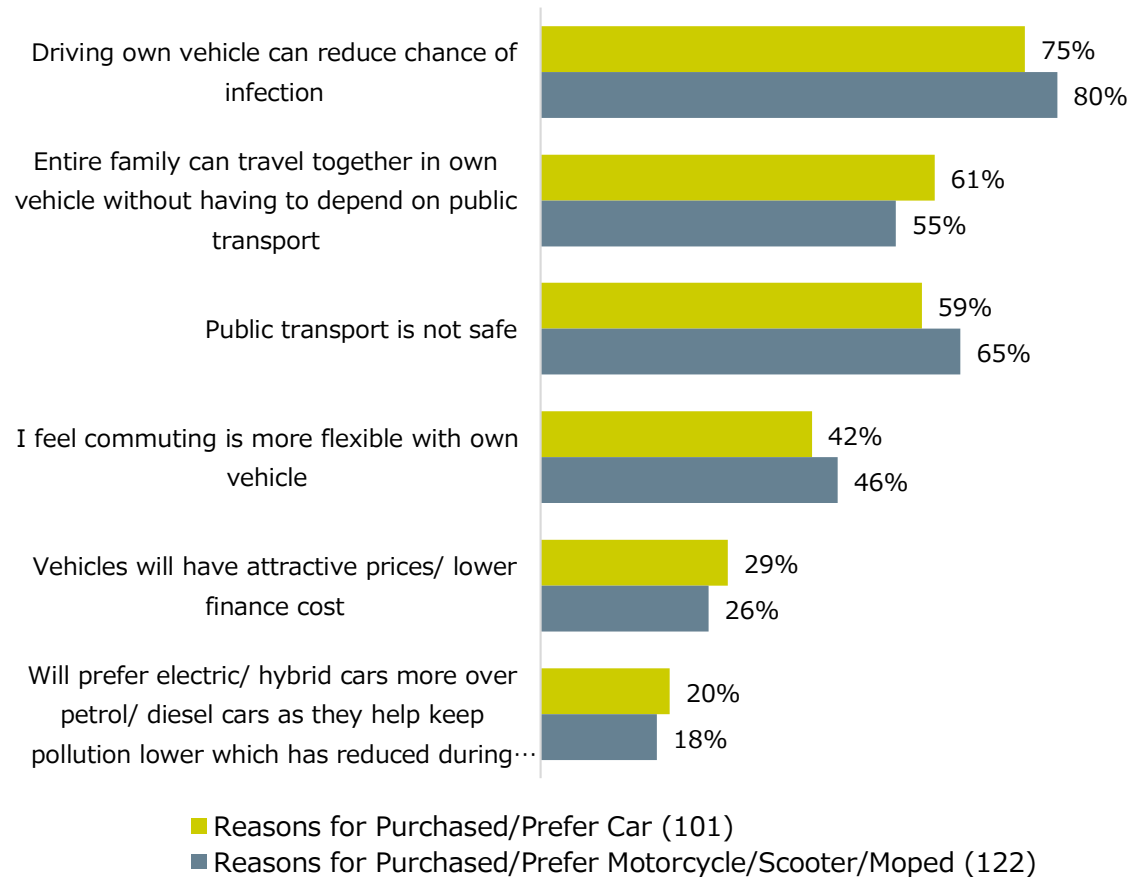
Car/2 wheeler purchase



- Already bought during lockdown
- Plan to buy in next 6 months

Note: The sum up of 'already bought' and 'plan to buy' doesn't match with total as some of respondents answered for both of them.

Reasons for Purchase/Intention to purchase



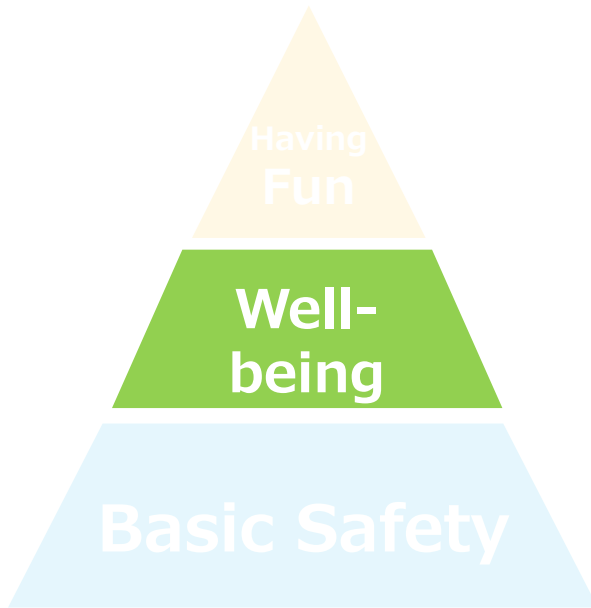
- Reasons for Purchased/Prefer Car (101)
- Reasons for Purchased/Prefer Motorcycle/Scooter/Moped (122)

Q. Why did you purchase / why are you planning to purchase your own Car/ Motorcycle/ Scooter/ Moped?

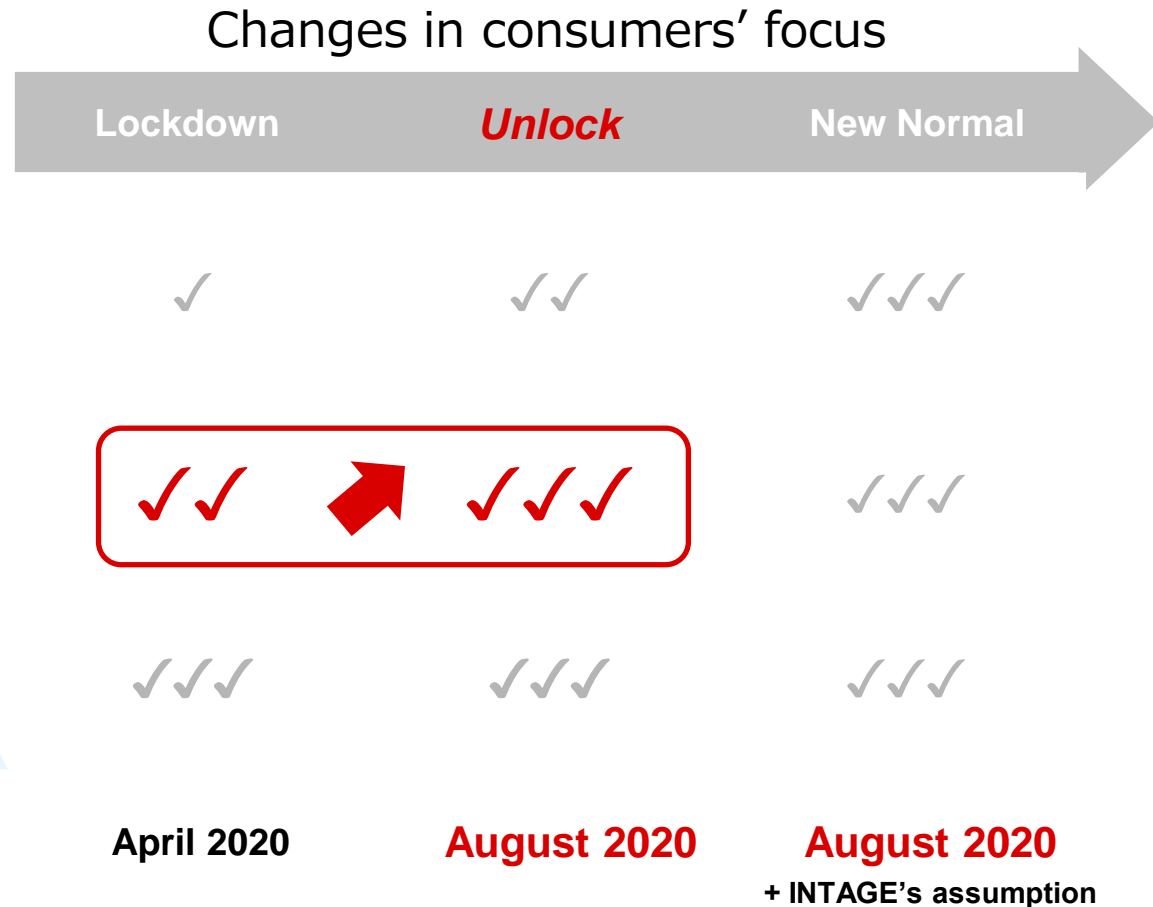
Key Findings 2:

Interest in well-being has become another key practice

The number of "✓" means level of interest/concern in each aspect in each timing.



Timing of survey



Consumers' voice about well-being

"Movement restrictions, that **kills you physically and mentally**" (Male, 43 years, Kolkata)

"**The isolation is maddening me**, its making me lazy and restless at the same time" (Female, 17 years, Mumbai)

"Freedom, Earlier we had no boundation and restrictions but now because of covid-19, we are bound to keep our mind always alert and **our mind is never relaxed completely.**" (Female, 34 years, Delhi)

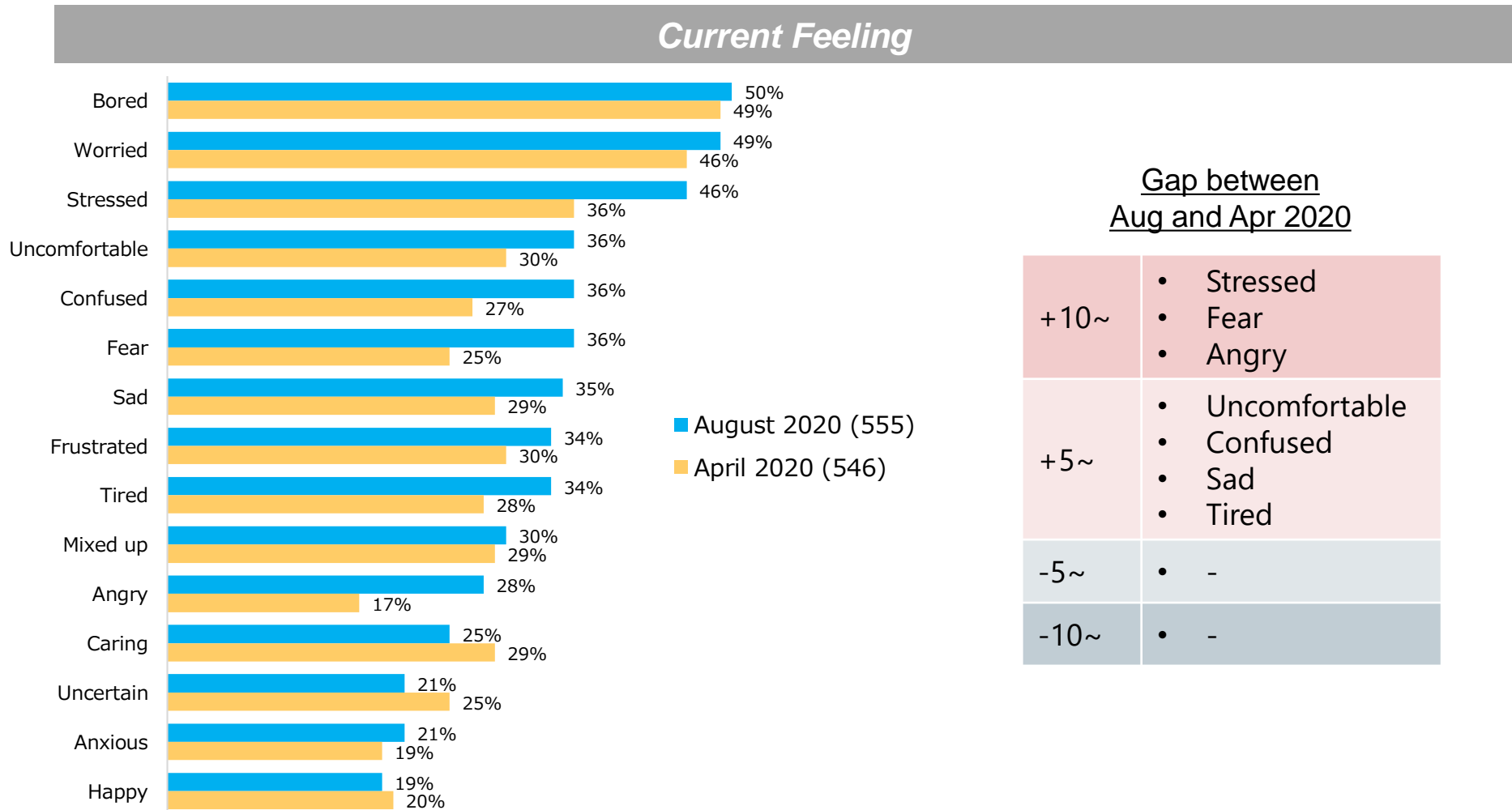
"Can't go to the classes. I'm preparing for competitive exams and thus it is **difficult to study on electronic media**" (Female, 20 years, Nagpur)

Protecting ourselves and family members from the virus can be by going out as less as we can. **Taking care of personal mental health has been difficult**, it is because of the isolation and no human contact. (Female, 21 years, Delhi)



People are suffering from mental health related issues

Same as the result of the survey in April, 'Bored' is the feeling people currently have the most. In August, almost all the negative feeling has increased which could affect their mental health.

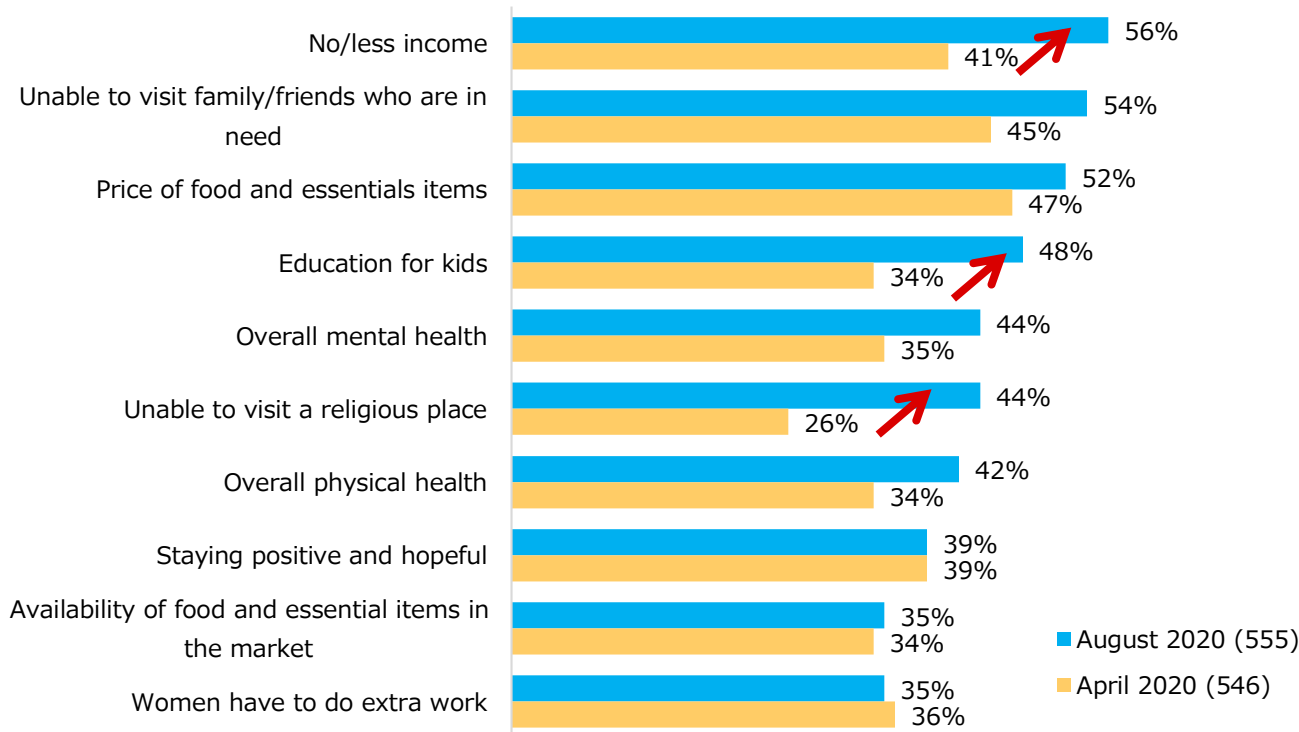


Q. Please select all the feelings you currently have?

People are concerned about finances, restricted social activities and kids education

Comparing to the survey in April, more people said that No/less income, Education for kids, Unable to visit a religious place are the current challenges they are facing. These concern affect both physical and mental health in a negative way.

Biggest challenges currently facing (Top 10)



Gap between Aug and Apr 2020

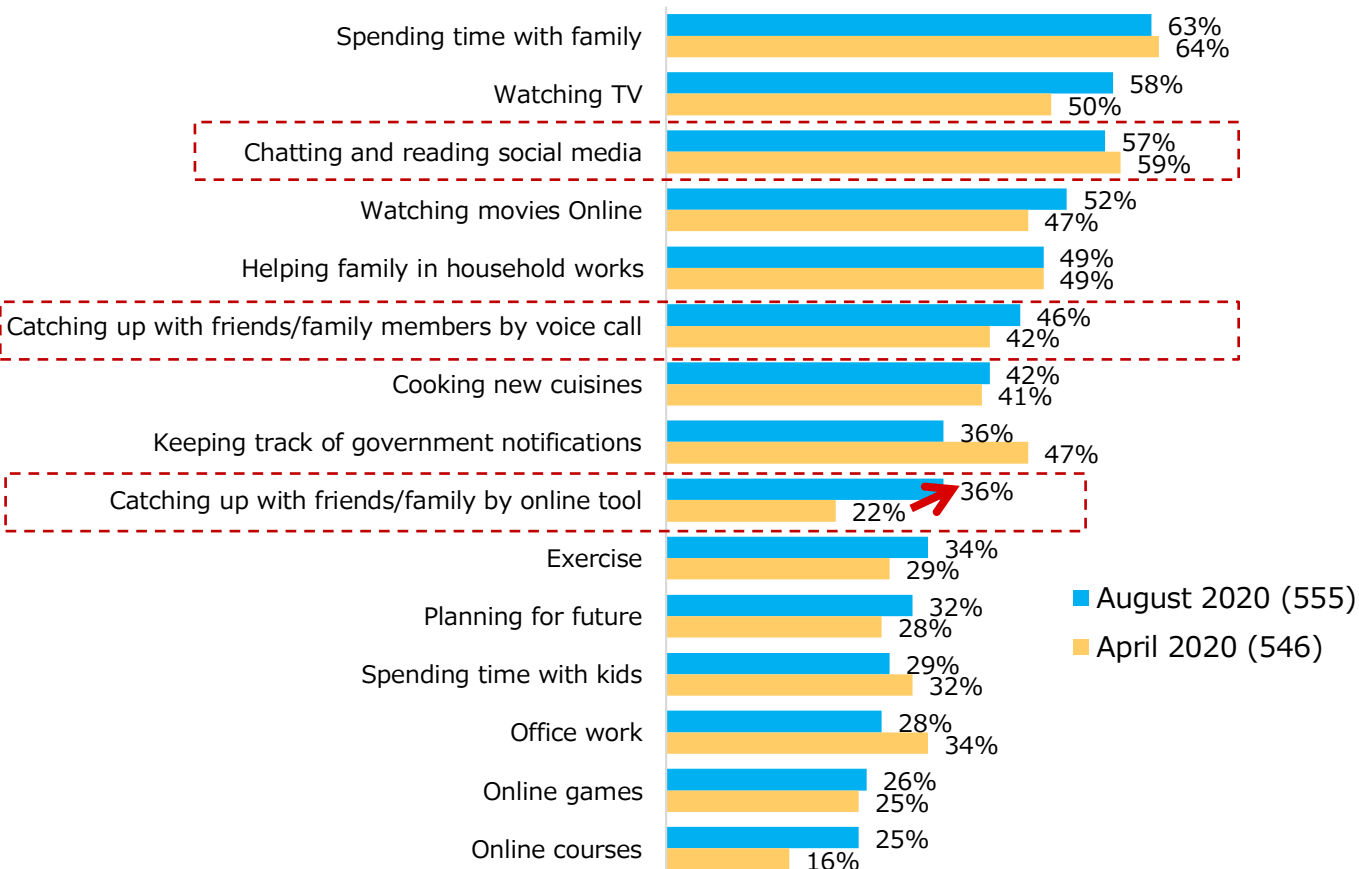
+10~	<ul style="list-style-type: none"> No/less income Education for kids Unable to visit a religious place
+5~	<ul style="list-style-type: none"> Unable to visit family/friends who are in need Overall mental health Overall physical health

Q. Which of the following challenges are you currently facing / experiencing in your daily life during this lockdown period. Please select all the options that are applicable

People are trying to maintain social connection

To spend more time at home, people watch TV and movie online. Additionally, they also spend the time to maintain social connection with friends and family especially via online tool. 'Catching up with friends/family by online tool' has increased significantly since April.

How to spend the time during the lockdown



Gap between Aug and Apr 2020

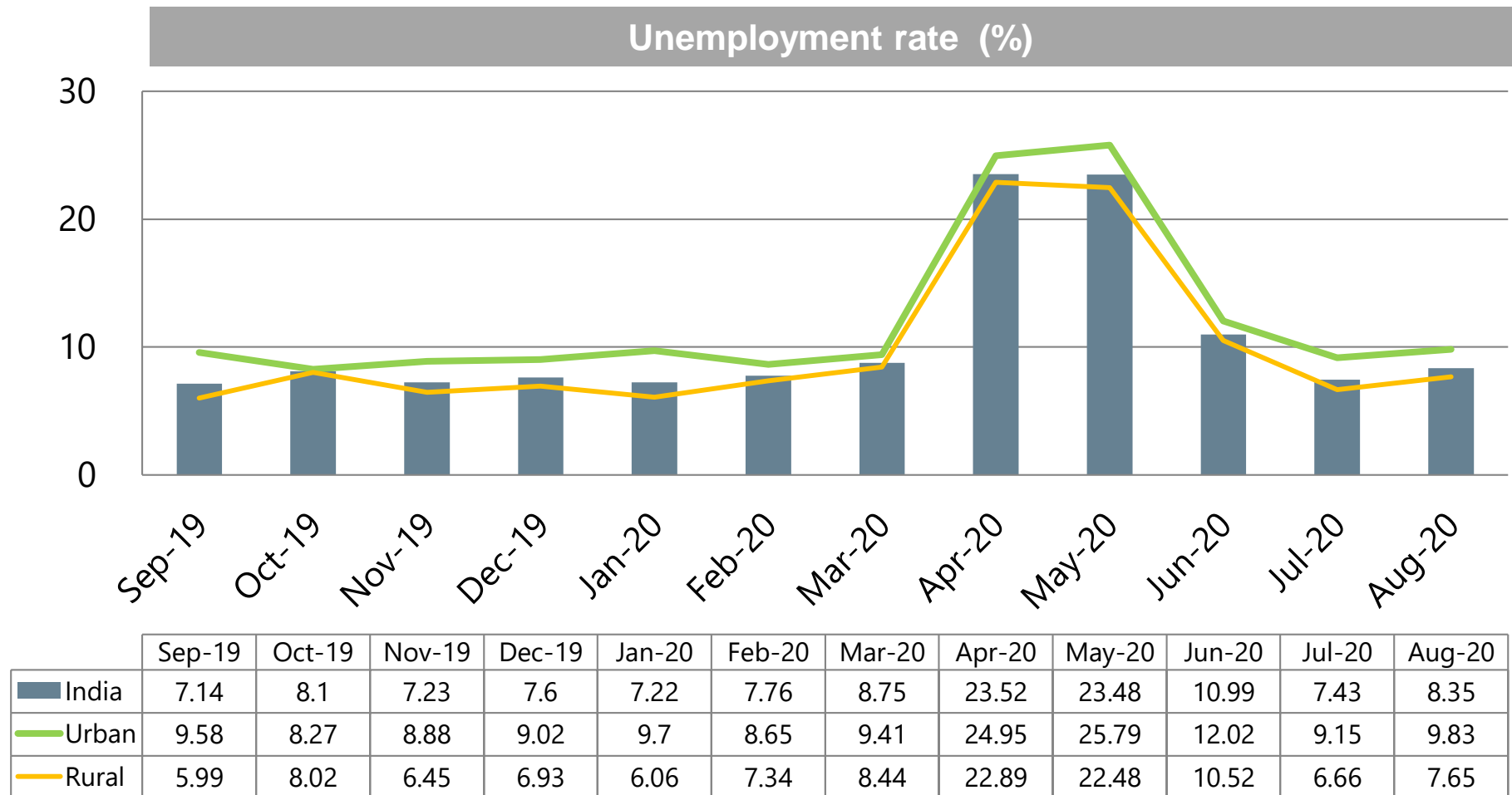
+10~	<ul style="list-style-type: none"> Catching up with friends/family by online tool
+5~	<ul style="list-style-type: none"> Watching TV Online courses Crafting
-5~	<ul style="list-style-type: none"> Office work
-10~	<ul style="list-style-type: none"> Keeping track of government notifications

Note: Some of the attributes not shown in the chart

Q. From the list of following activities, which ones did you find yourself spending more time at home, in this lockdown period, compared to earlier?

Reference - Unemployment rate is improving after June

Unemployment rate was increased drastically in April and May, but it is improving after June 2020.



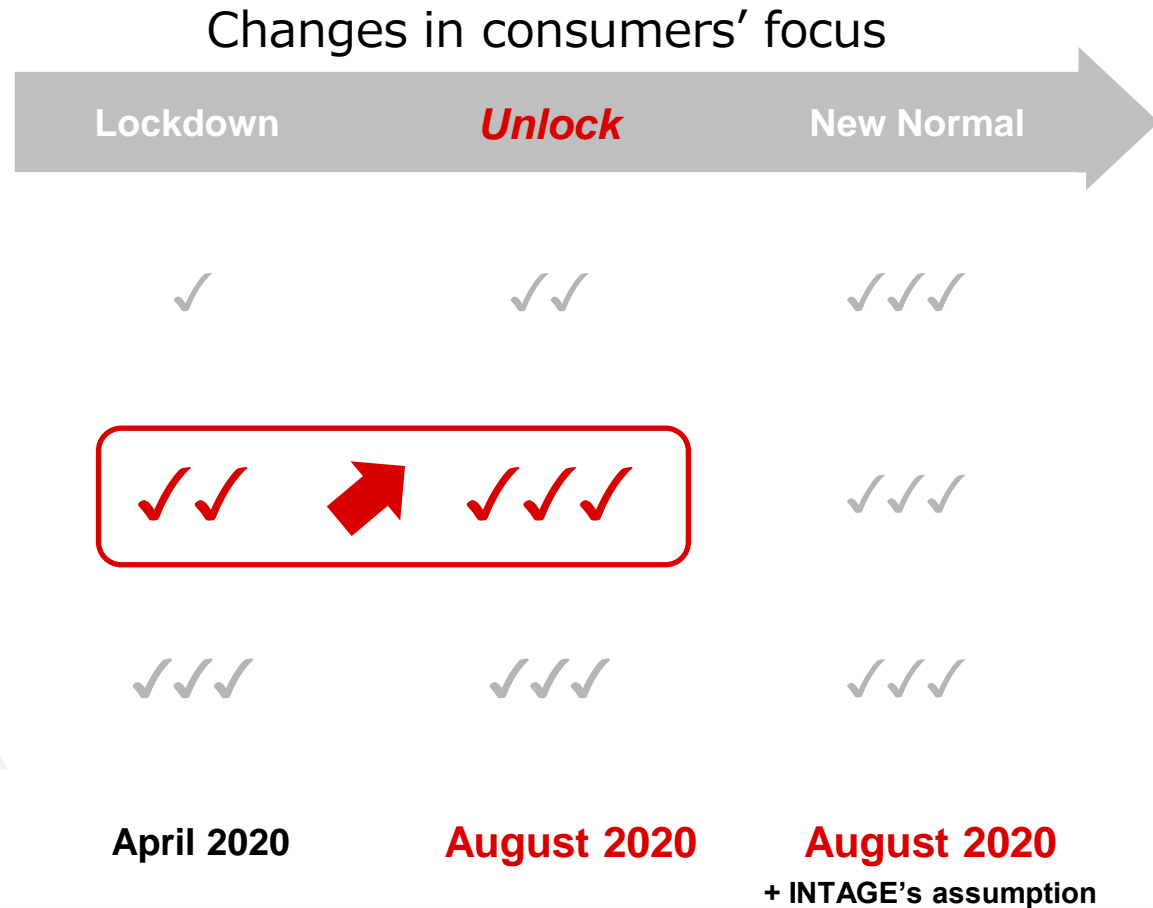
Source: CMIE (<https://unemploymentinindia.cmie.com/>)

Key Findings 3: Females are exhausted from household work

The number of "✓" means level of interest/concern in each aspect in each timing.



Timing of survey



Consumers' voice about extra works and no free time

" All the works done by myself as servants are not coming. Main concern is "There is no end to this pandemic" (Female, 45 years, Mumbai)

"It has become headache to sanitize or wash hand regularly. Also **to wash vegetables and utensils and cleaning home is a big challenge as maid is not available. Children and husband demands for dishes and sweet dish so I am totally in kitchen during these days** as no one can order from outside. But one positive thing is that we all are together spending time." (Female, 39 years, Delhi)

" House work load and cooking time increases, not getting time for self pampering" (Female, 30 years, Mumbai)

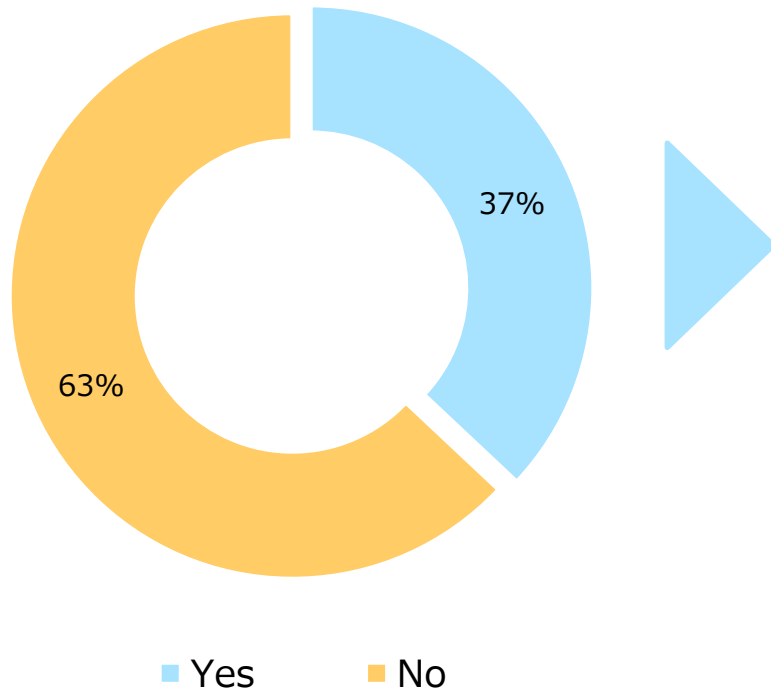
Impact on income, lifestyle and work life balance. In female case, we have **online office as well as increased household chores and cooking.** (Female, 40 years, Mumbai)



Females used to get help from maid for domestic works

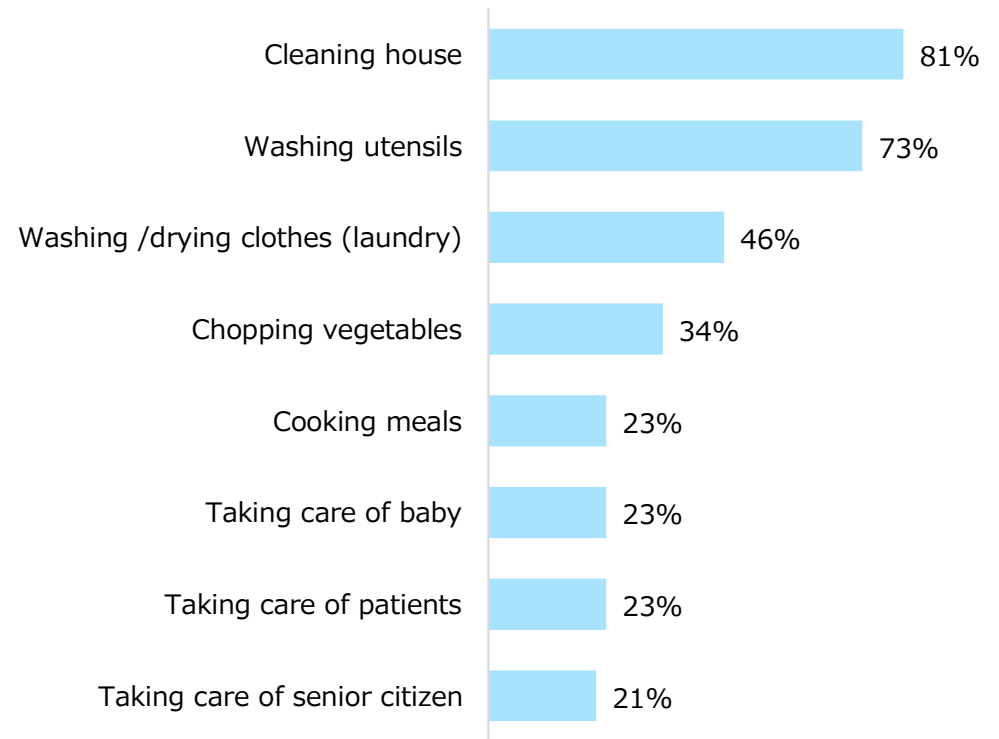
37% hired maid before the lockdown and majority used to get help on cleaning their houses and washing utensils.

Hire maid for household chores before Covid19 outbreak



Base - Female (248)

Roles and duties of maid



Base - 91

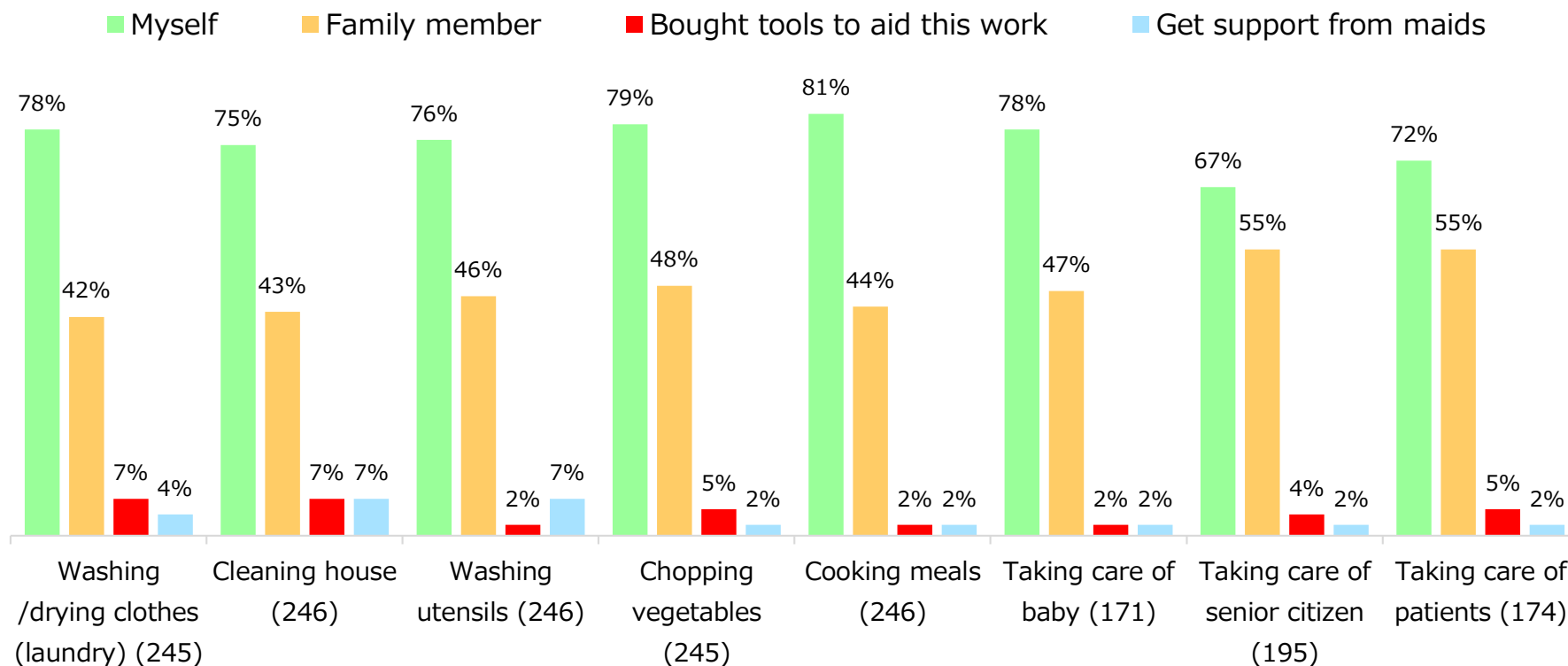
Q. Did you hire maid at home to help in household chores before the Covid - 19 outbreak?

Q. What was maids' roles and duties?

Currently, females are working hard without having maid

Currently, most of domestic works are done by the females by themselves, although other family members are supporting them. In addition to non-availability of maid, work from home and study at home increased domestic workload as all the family member are at home all the time.

How to manage household chores currently?



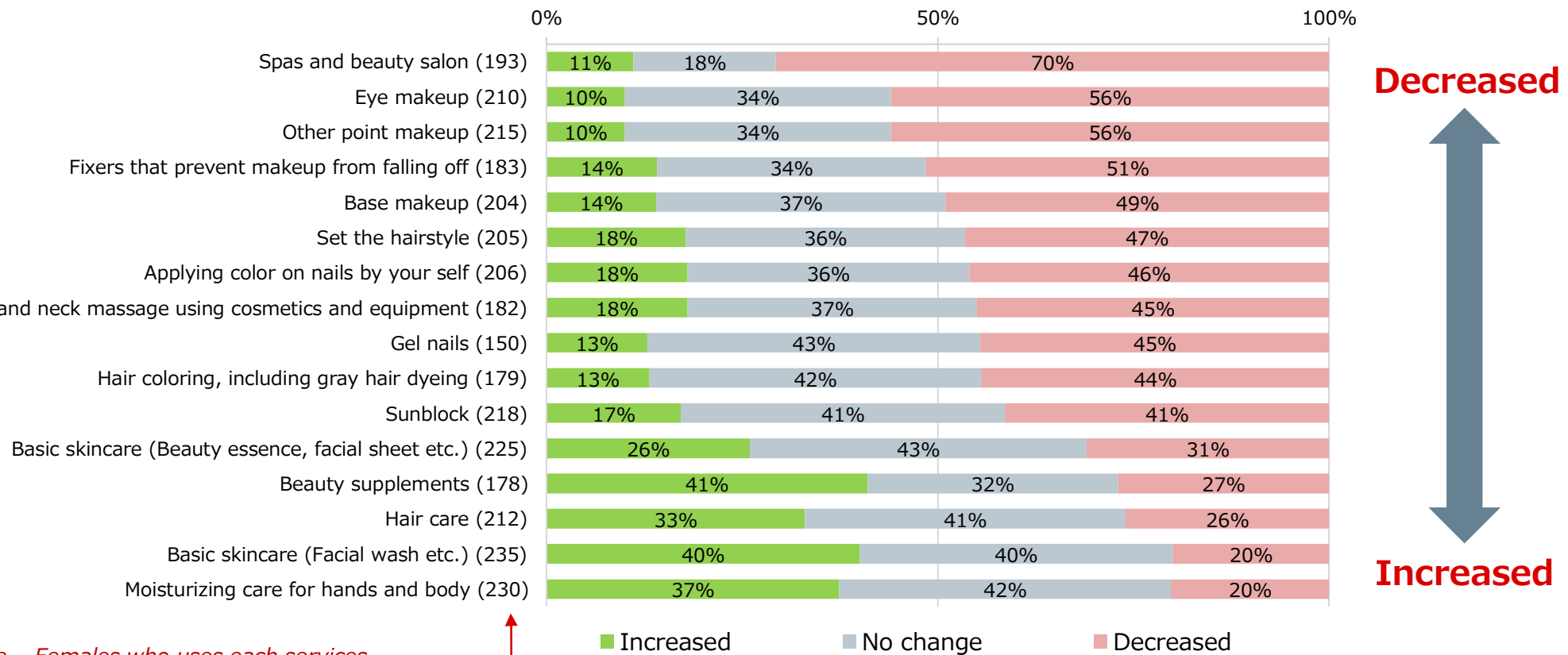
Base - Female and those who do each of household chores at their home

Q. How are you managing the household chores now?

Females has less opportunities to make themselves relaxed

Due to the restrictions on outings and initiation of work from home culture, the frequency of makeup, hairstyling and going to spa and salon have decreased significantly which could help to change their mood before the pandemic.

Behavioral change towards beauty and makeup after Covid19 outbreak



Decreased

Increased

Q. What behaviours have increased or decreased in regards to your beauty and makeup during the Covid - 19 outbreak situation?

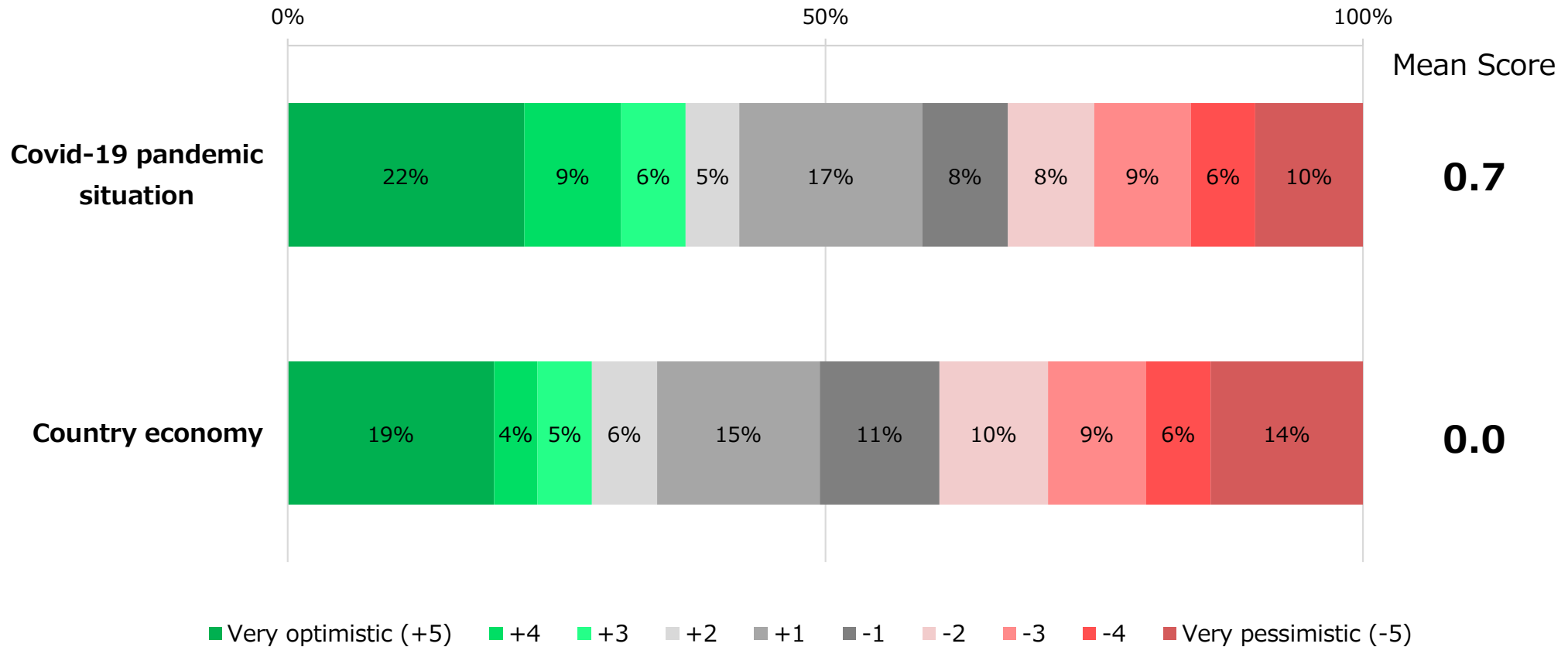
A photograph of a busy street in India, likely in a city like Mumbai or Delhi. The street is lined with multi-story buildings, many of which have numerous signs and advertisements. Some of the visible signs include 'TATA', '100%', '100% SANGAM', and 'SANGAM'. There are many people walking on the sidewalks and riding motorcycles on the road. The scene is captured in a slightly blurred, motion-captured style, suggesting a fast-paced environment. The overall atmosphere is one of a bustling, commercial hub.

How will consumers change in the phase of 'New Normal'?

Key concern in the future is about country economy

In terms of the pandemic situation, more than half of people are optimistic about the future. People are concerned about the country's economy more.

Base – All (555)



Q. How much are you optimistic or pessimistic about the future overall?

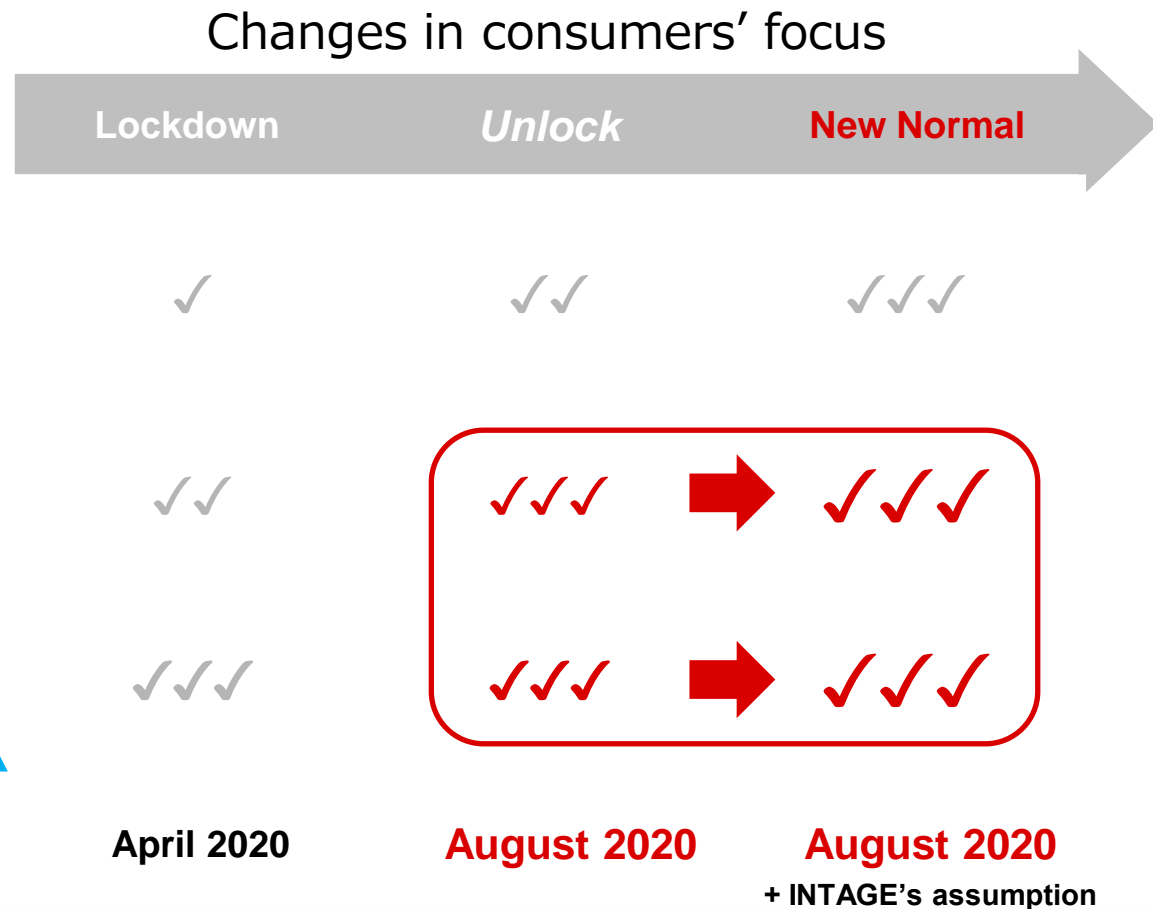
Key Findings 4:

Basic Safety and Well-being continue to be a trend to improve quality of life

The number of "✓" means level of interest/concern in each aspect in each timing.



Timing of survey



Change in daily activities – the Framework

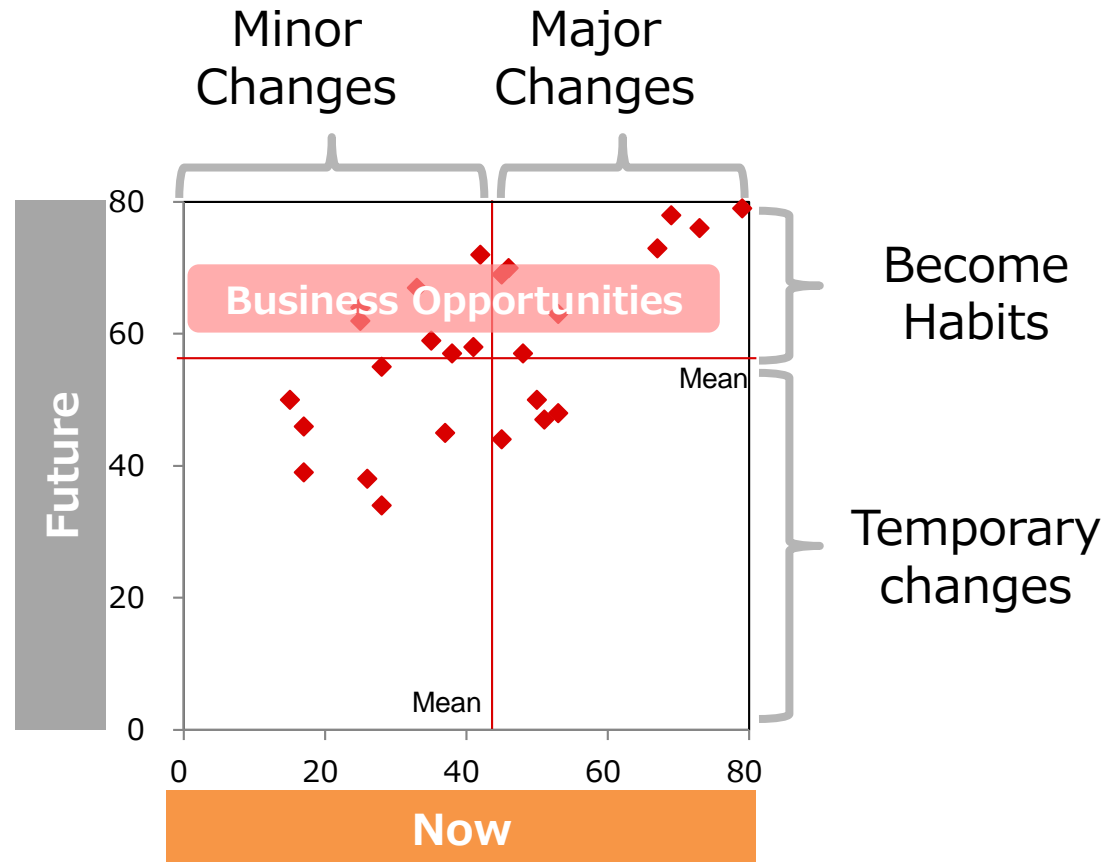
Analyze the following two questions to identify the changes after the lockdown which also mean business opportunity in the future

Now – Changes during the lockdown

Q1. *How have your daily habits changed during the current Covid - 19 situation as compared to the initial lockdown period?*

Future – Changes after lockdown

Q2. *Among them, which ones do you think you would continue to do even after.*



Basic Safety continue to be a habit, Well-being will be next trend

Basic Safety – immediate measure to reduce the risk of infection would continue to be a habit. Well-being – prevention measure and improve the quality of life will be the next focus.

- Focus more on immune boosting foods
- Changing clothes more frequently
- Increased self cooking frequency
- Taking more health supplement
- Increased exercise/fitness
- Open window and ventilate air more frequently
- Increased support for your child's education

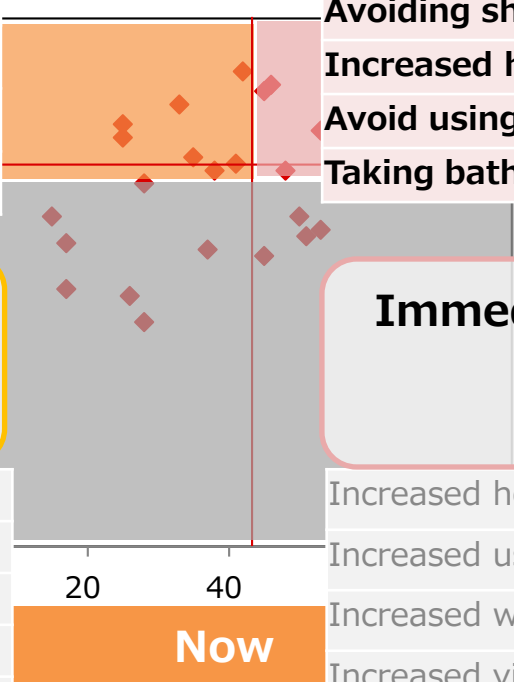
- Wearing mask
- Using sanitizer frequently
- Washing hands more frequently
- Wash/sanitize items after buying
- Avoiding shaking hands while greeting any person
- Increased hours of spending with family/children
- Avoid using cash
- Taking bath more frequently

Prevention measure and improve the quality of life
 → **Basic Safety + Well-being**

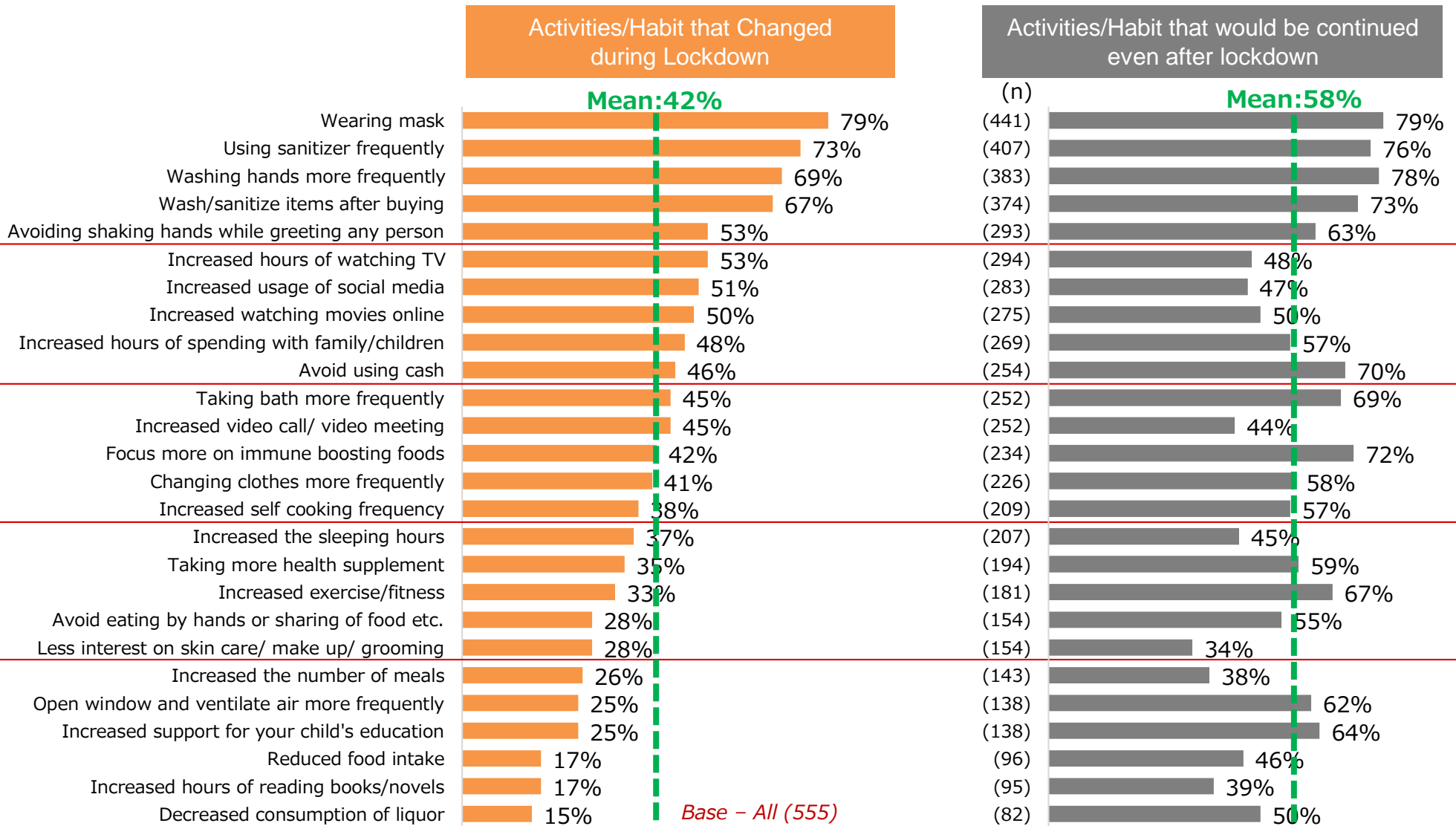
Immediate measure to reduce the risk of infection
 → **Basic Safety**

- Increased the sleeping hours
- Avoid eating by hands or sharing of food etc.
- Less interest on skin care/ make up/ grooming
- Increased the number of meals
- Reduced food intake
- Increased hours of reading books/novels
- Decreased consumption of liquor

- Increased hours of watching TV
- Increased usage of social media
- Increased watching movies online
- Increased video call/ video meeting



Change in daily activities – the Detailed data



Q. How your daily habit has been changed as compared to before lockdown period.

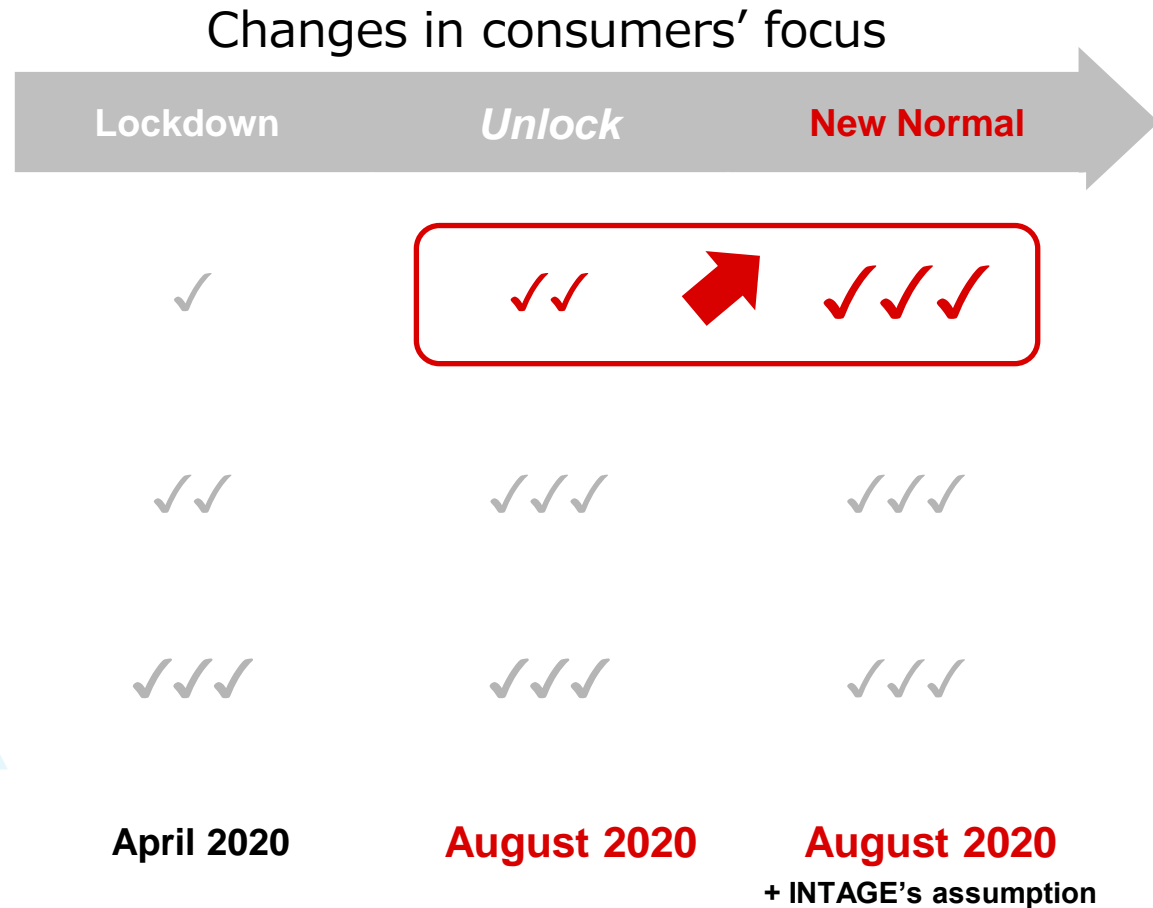
Q. Among them, which do you think you would continue to do even after the lockdown period is over.

Key Findings 5: Consumers are eager to have fun and socialize

The number of "✓" means level of interest/concern in each aspect in each timing.



Timing of survey



Consumers' voice about desire to go out and having no fun

"Biggest challenge due to Covid is **I have to stay all day at home, nowhere to go**, not able to concentrate on work as **I use to go outside for relaxing my self**" (Female, 21 years, Delhi)

"Biggest challenge would be **lack of exposure to the outside world**. Since I'm restricted to the 4 walls, it's very difficult for me to find **a life outside my house** (from Netflix and work)" (Male, 21 years, Bangalore)

"I faced many challenges like spend life without maid, shopping, **without party** and normal health issues in pandemic situation." (Female, 40 years, Delhi)

Staying at home without going out is the biggest challenge because **I used to be always outside with my friends, cousins and now it is missing** in this lockdown period. (Male, 22 years, Bangalore)

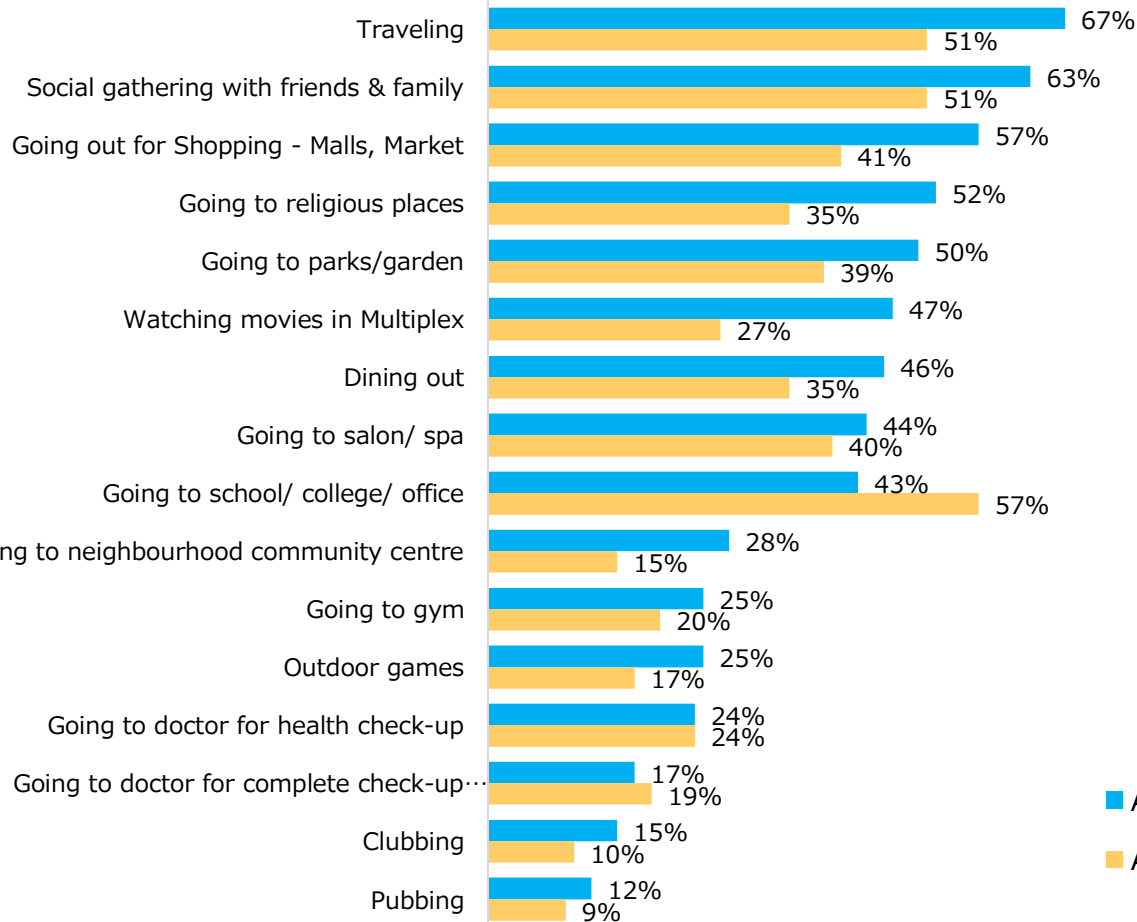
Current Covid19 situation is very big problem in our life as I and my family **cannot go easily anywhere due to restrictions and fear of infection. Getting bored, no fun at all.** (Female, 28 years, Mumbai)



Consumers are really keen to go outside

Going out from home and socializing are the activities that consumers are currently missing and really eager to have.

Activities missing and want to do after the lockdown



Gap between Aug and Apr 2020

+10~	<ul style="list-style-type: none"> Travelling Social gathering with friends & family Going out for Shopping - Malls, Market Going to religious places Going to parks/garden Watching movies in Multiplex Dining out Going to neighbourhood community centre
+5~	<ul style="list-style-type: none"> Outdoor games
-5~	<ul style="list-style-type: none"> -
-10~	<ul style="list-style-type: none"> Going to school/ college/ office

■ August 2020 (555)
 ■ April 2020 (546)

Q. Which activities are you missing a lot now and want to do once the lockdown ends?




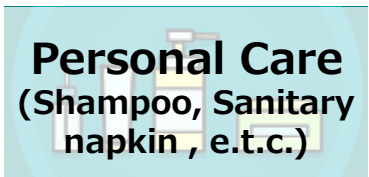
A shopping cart in the foreground and a receipt in the background. The receipt is slightly out of focus and contains the text: 'Total: 99.00 EUR' and 'U HEEFT BETAALD'.

How will shopping behaviour/Usage of services change?

Frequency of shopping has returned to the level before lockdown

Frequency of shopping had decreased significantly in April, however, it has already returned back to the previous levels at the timing lockdown started.

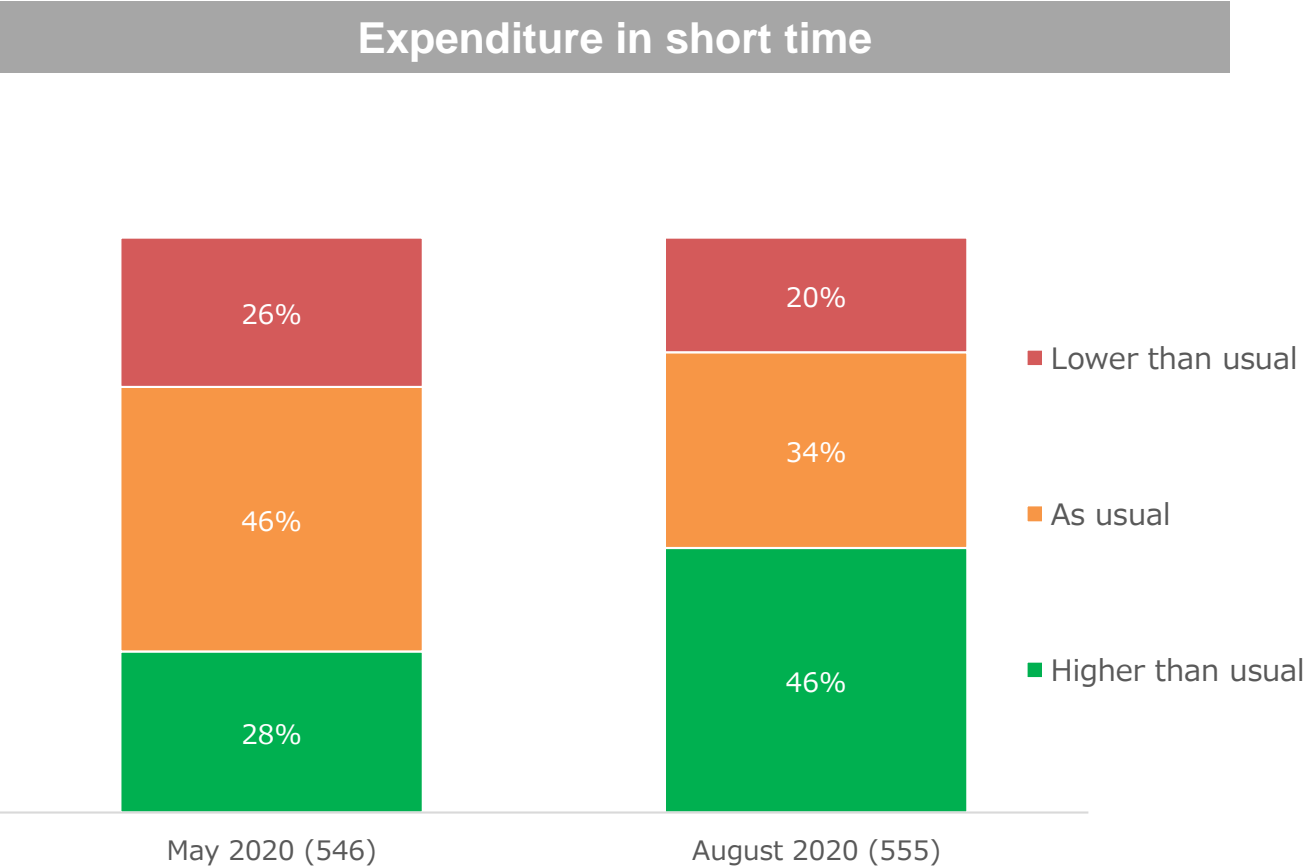
Average shopping frequency per week before/after the lockdown

	<i>Before</i> Lockdown		<i>April</i> 2020		<i>August</i> 2020
	<i>Base – All (546)</i>		<i>Base – All (546)</i>		<i>Base – All (555)</i>
 <p>Fresh Food</p>	3.8	➔	2.9	➔	3.5
 <p>Food Item (Rice, Pulse, Spice, Beverage, e.t.c.)</p>	1.3	➔	1.1	➔	1.4
 <p>Non-Food Item (Laundry, Household items, e.t.c.)</p>	1.1	➔	0.8	➔	1.0
 <p>Personal Care (Shampoo, Sanitary napkin, e.t.c.)</p>	0.7	➔	0.7	➔	0.8

Q. Before/During the lockdown period, how frequently did you buy the each of item? Note: Giving a weight to single response answer e.g. Daily=7, once a week=1

Consumers are ready to expend higher than usual

Now, almost half of respondent said they feel personal expenditure will be higher than usual in short term.



Q. Once the lockdown period is over, how will your expenditure change in short term?

Next opportunity would be the items to make life comfortable and convenient at home and Preparation for uncertain future

What people already purchased during the lockdown/unlock were (1) the items which are helpful for them to spend their time at home as well as required for work from home, and (2) which will make their life convenient at home. Future purchase intention is majorly focusing on preparation for uncertain future.

Top 10 items purchased/plan to purchase

Products bought during the lockdown

- 1 Smartphone
- 2 Laptop/desktop
- 3 LED/Smart TV
- 4 Subscription to OTT Platforms
- 5 Health Insurance
- 6 Refrigerator
- 7 Washing machine
- 8 Life insurance
- 9 Fitness accessories
- 10 Motorcycle/Scooter/Moped

Products planning to buy in the next 6 months

- 1 Smartphone
- 2 Health Insurance
- 3 Laptop/desktop
- 4 Gold/silver (jewellery)
- 5 Fitness accessories
- 6 Furniture
- 7 LED/Smart TV
- 8 Life insurance
- 9 Car
- 10 New home/property

Must to have digital gadget to stay home



Items to make the life convenient

Items to make the life convenient



Preparation for uncertain future

Product

Price

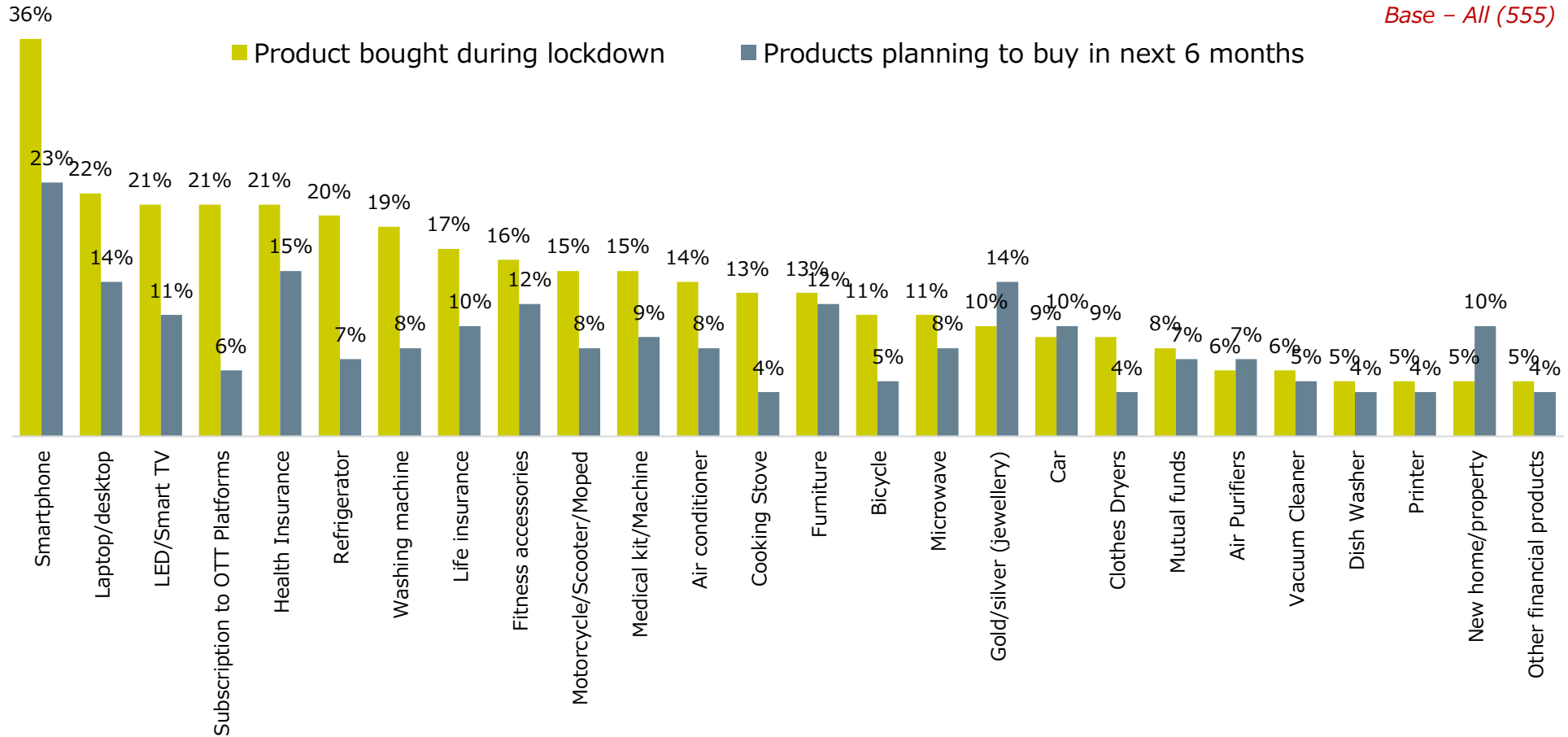
Place

Promotion

Purchased/planned to purchase items –Detailed data

Product Purchase or Preference

Base – All (555)



Q. Since the time the lockdown period has started for Covid - 19 outbreak, which all products did you buy already?

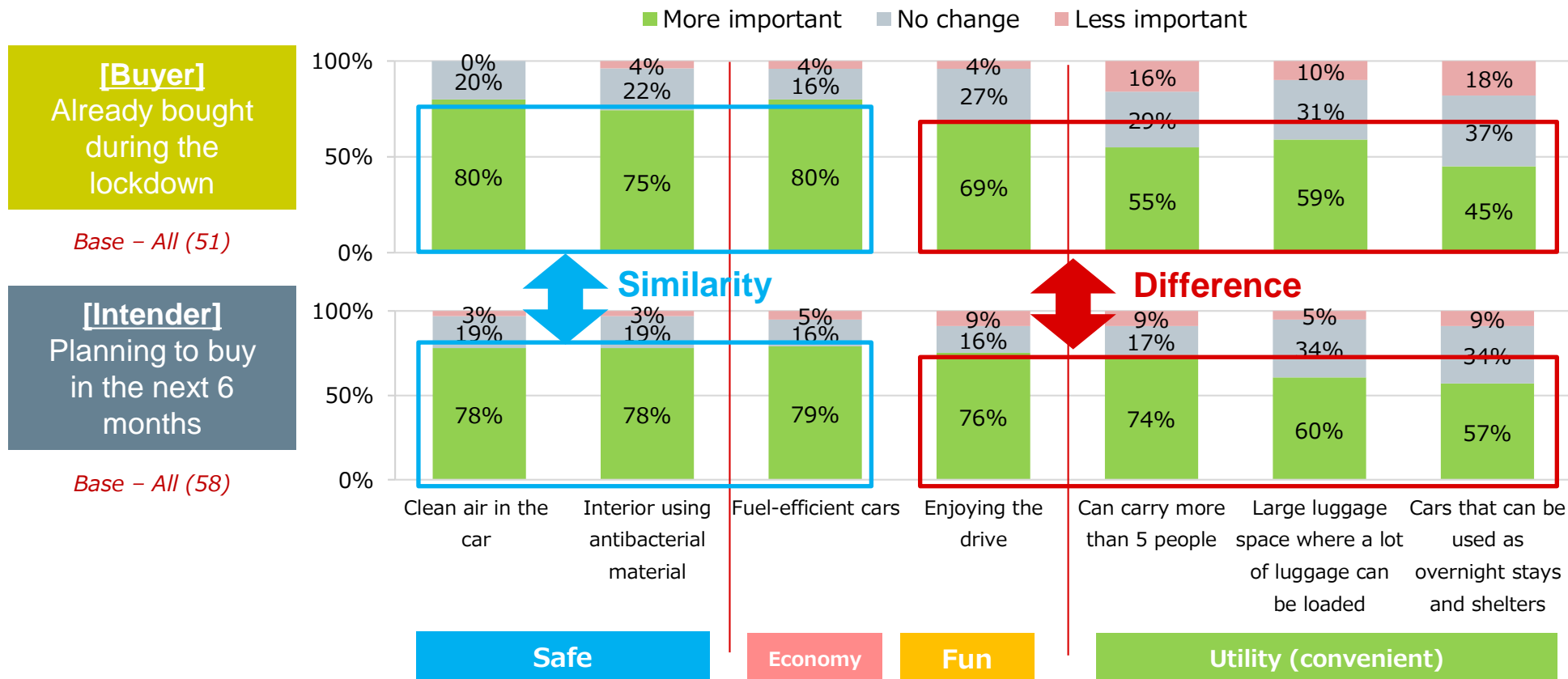
Q. In next 6 months, which all products are you planning to buy?

Fun and Utility is more important for the future car purchase

Safety and Economy has emerged as more important aspects than others for both, those who already purchased a car and those who are planning for future purchase. However, intenders will give more importance on Fun and Utility in addition to Safe and Economy.

Product
Price
Place
Promotion

Change in importance of car buying after Covid19 outbreak



[Buyer]
Already bought during the lockdown

Base - All (51)

[Intender]
Planning to buy in the next 6 months

Base - All (58)

Similarity

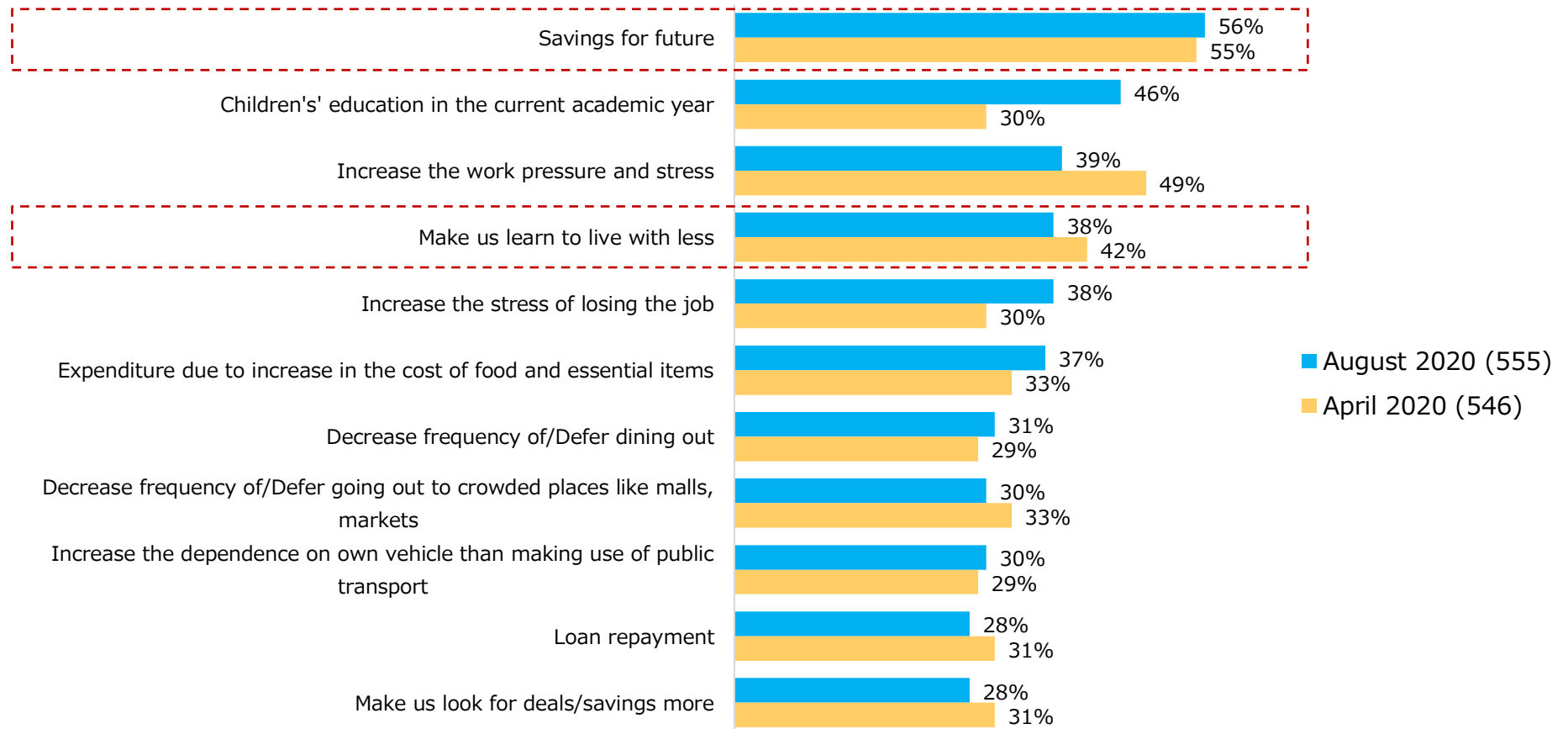
Difference

Q. How do you feel your focus on car buying has changed in terms of importance as compared to before the Coronavirus (COVID-19) outbreak?

Consumer may face financial difficulties and reduce expenses

People would try to minimize the expense and prepare for uncertain future; Savings for future and Make us learn to live with less are good example.

Activities impacted/affected for lifestyle (top 10)



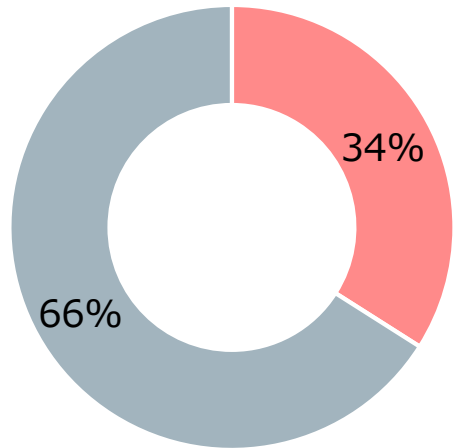
Q. Which of the following activities will impact/affect you after the lockdown period is over. Please select all the options that are applicable.

However, the majority feel quality is more important than price

66% said that quality is more important than price. The way of selecting an item to buy remains the same - 'Value for Money' must be the key. Price is obviously very important, however, consumers should focus more on quality aspect. Also, they prefer to select branded product in order to avoid the risk of failure in product selection.

Product
Price
Place
Promotion

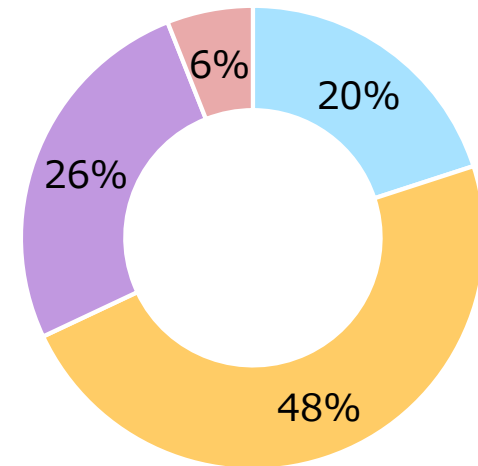
Importance Price VS Quality



- Importance on price when shop
- Importance on quality when shop

Behavioral change towards purchase of apparel

Base - All (555)



- Still looking for high quality, premium branded products
- Prefer to buy branded quality products, but that should be value for money brand
- Don't want to stick with any brand value, but, more on quality
- Prioritize cost - irrespective of quality

Q. When you are purchasing any apparel/ dresses during this 'new normal' phase (post lockdown); out of the below statements, which describes best your behaviour?

Online shopping has got more popular than ever

Though frequency of shopping returned to the previous level, the way of shopping has changed. Online shopping got popular while the number of people who visit shops is getting lesser.

Changes in shopping channel before/after the lockdown

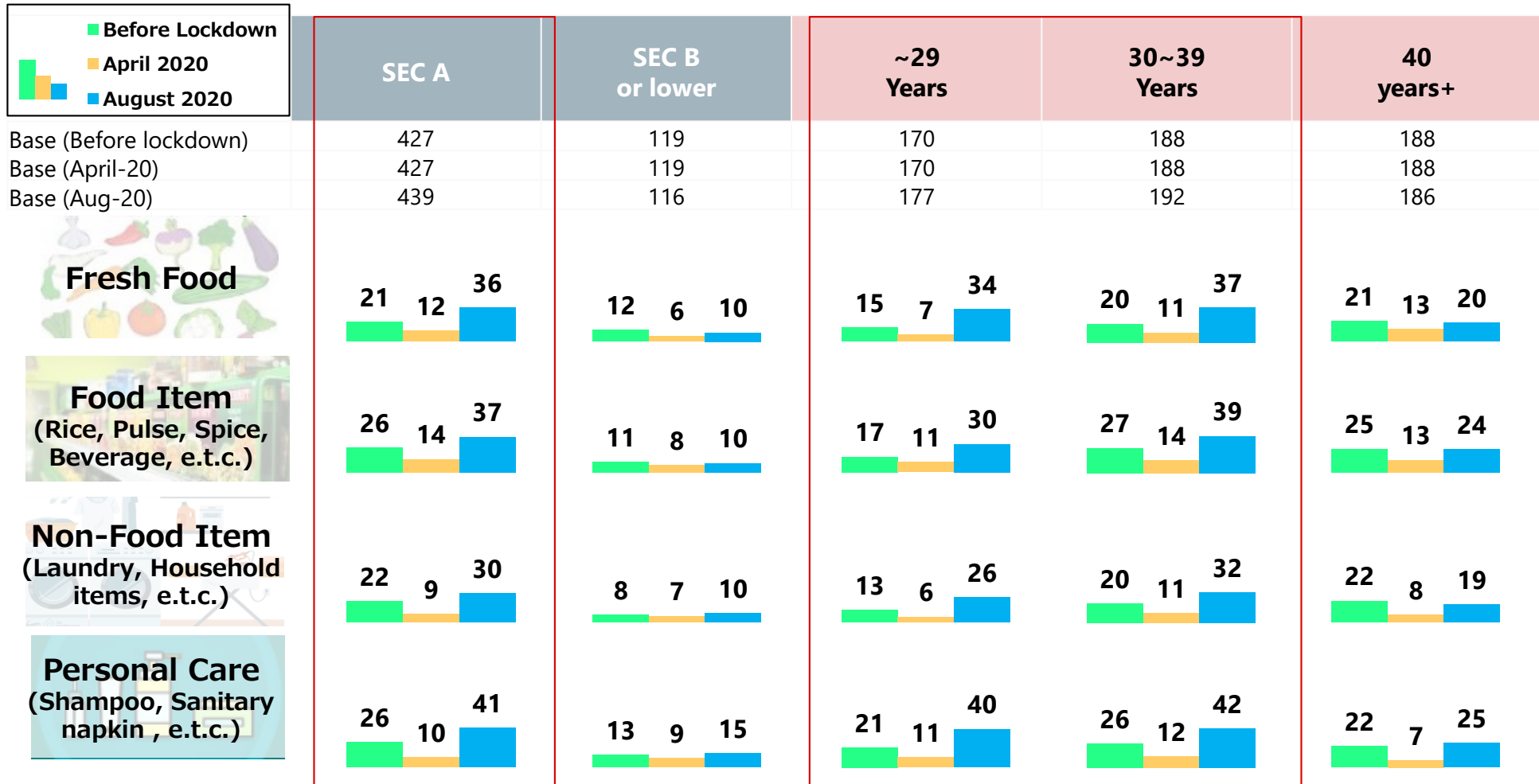


Q. Before/During the lockdown period, from where did you buy the each of item?

Higher income/younger age group shop online more

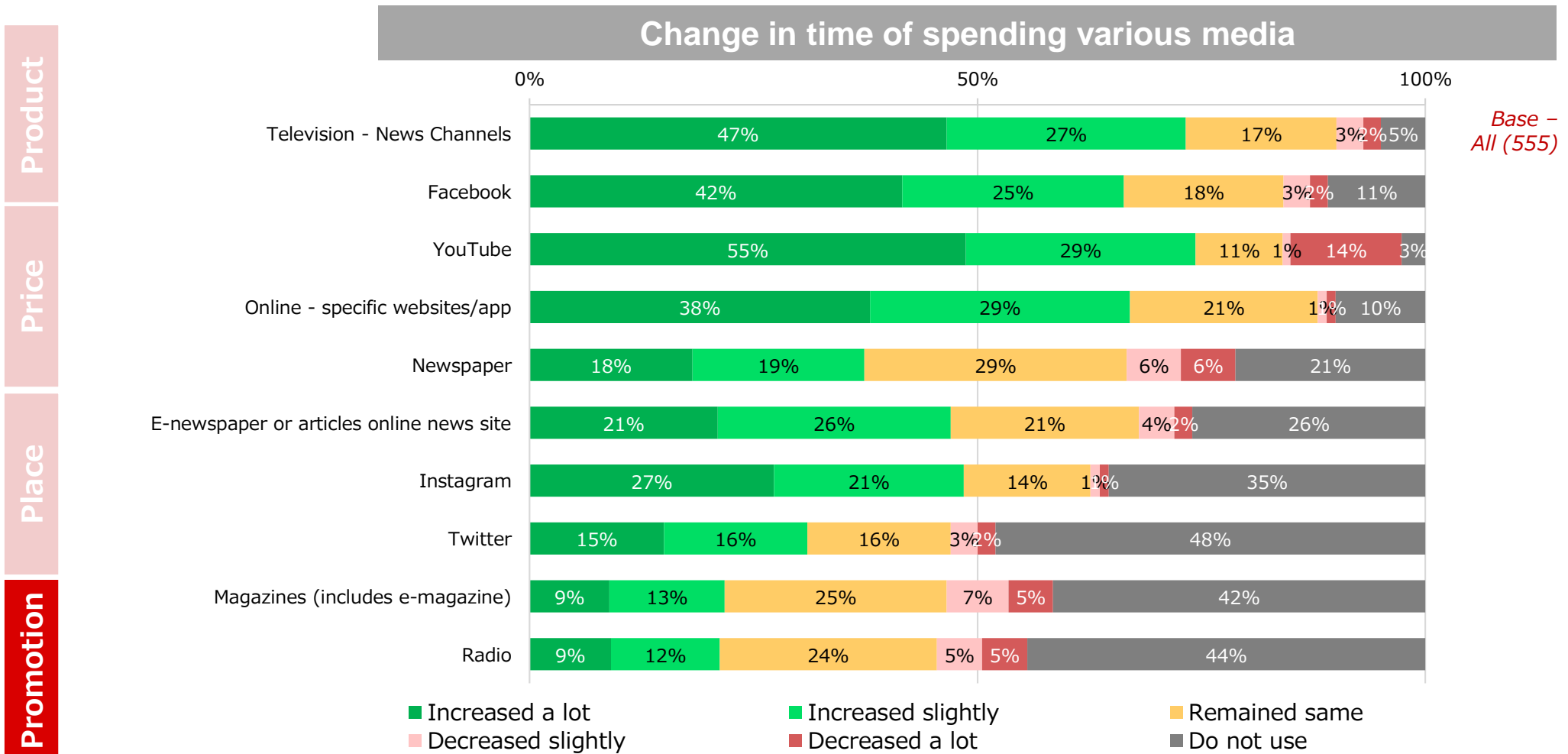
Comparing the online shopping usage by income and age group, higher income group (SEC A) and younger age group (~39 years old) use it more than others.

Usage of online shopping



TV, Facebook and Youtube are the key media to reach out to the consumers

Comparing to timing when the current situation has not started, approx. 70% has increased their time to spend on TV, Facebook, YouTube and other online services. It must be the key media to penetrate the consumers in near future.



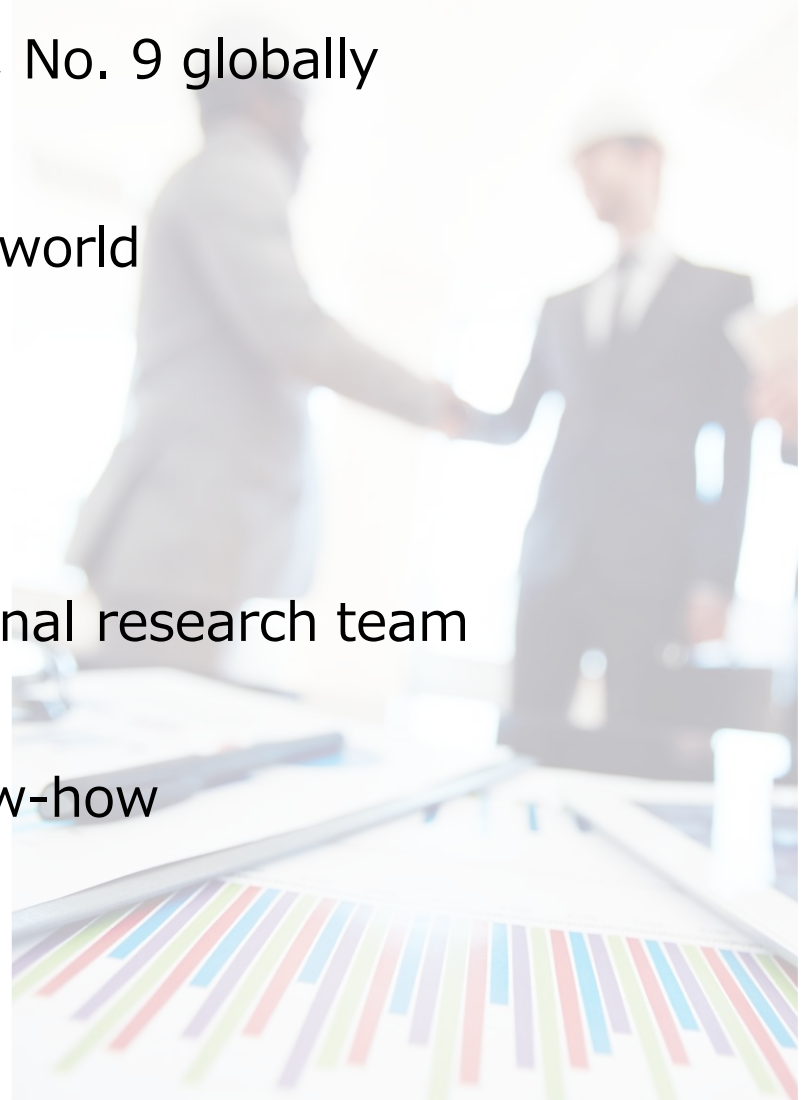
Q. How the amount of time you spend on each of media has changed after the initial lockdown has started?

About INTAGE



INTAGE India is Your Marketing Partner

- **No.1** Marketing Research firm in Japan, No. 9 globally
- About **3,000 professionals** across the world
- More than **15** years experience in India
- **Global and local insight** by multi-national research team
- Japanese standard **quality control** know-how
- **Pan-India** fieldwork capability



INTAGE INDIA – Snap Shot



Established

August 2012

Expansion

Acquired an Indian agency in 2014

Capital

INR 32.2 crores (INR 322 million)

Employees

Over 105 full-time staffs across India

Coverage



- Head office in Delhi
- 9 offices/satellite location and more than 1,300 interviewer across the country

(Red) Office / satellite location



Intage
Digital/ Remote
Research Platform

Consumer Life Panorama

Understanding “Real & Digital” Life of Consumer



Consumer Life Panorama

Consumer life Panorama support to understand the **digital** and **real** life of your customer

My App

Understand Digital life you customer

- Which app do they use?
- How to use each app?
- How many hours do they use each app?



My Home

Understand the usage of product in "real" life space



Consumer Life Panorama: Output Image: My App

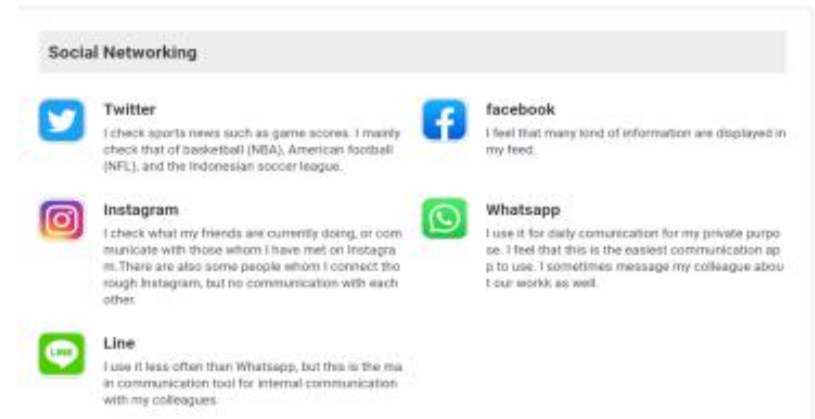


If there are any folders, ask him/her to take folders as well.



Read More

If respondent use several apps in typical purpose, can understand reasons for using each app.



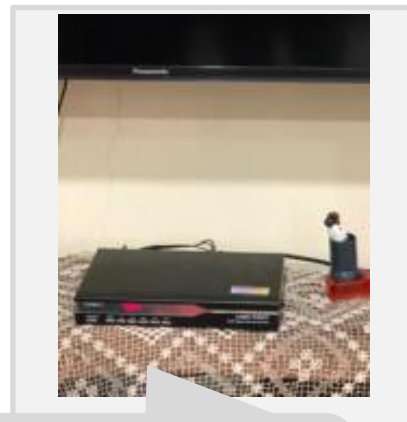
Consumer Life Panorama: Output Image: My Home



By clicking and moving the image, you can see the entire room in panoramic 360-degree views.



The dimensions and square meter of the rooms are displayed (automatically calculated by artificial intelligence)



Detailed pictures of specific parts of a room can be added in the 360-degree views.



Use Case of Consumer Life Panorama

- ✓ “Prior to expanding our business to a country/ region where we newly approach, we would like to **have a rough idea of the lifestyle of local consumers.**”
- ✓ “Would like to **understand actual lifestyle of local consumers** while discussing about new products.”
- ✓ “Would like to **share** the atmosphere of local consumer’s lifestyle **with our team members who did not visit the place.**”



Package/ Ad Evaluation Tool “i-Mesh”



i-Mesh

i-Mesh delivers consumers' **intuitive evaluations** of package and ad creative, and presents response findings in a visually easy to understand manner



Select like/dislike area by clicking the photo



Heat Map



Heat-map makes easy to understand which elements convey positive/ negative impression

i-Mesh: Ad Evaluation

TVC (Story Board)

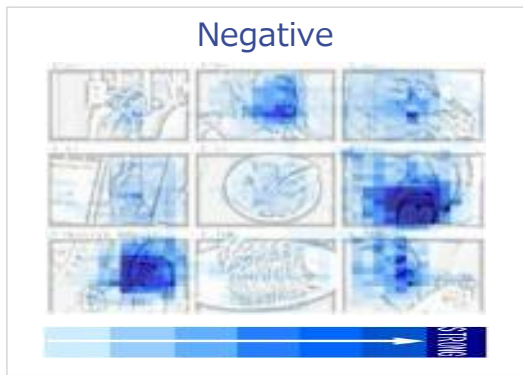
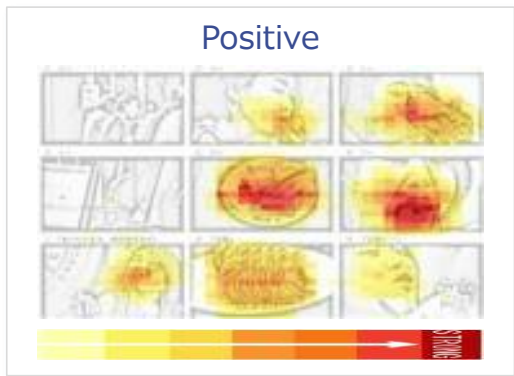


Printed Ad



i-Mesh: Additional Output

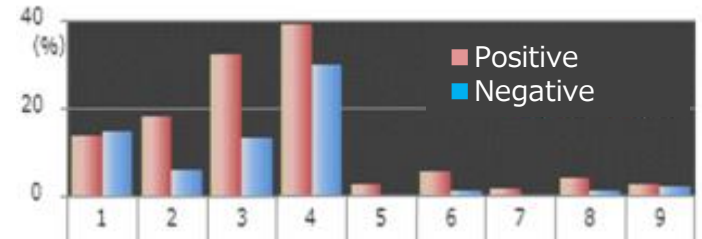
Visually easy to understand
Heat maps



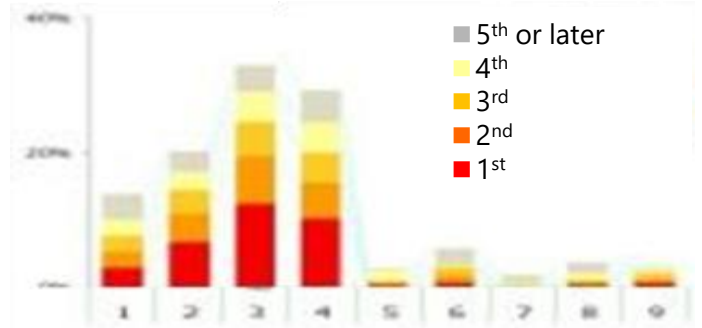
Zones can be freely set as you want



Which elements effectively evoked pos. reactions?
Click rates by zone



Which elements catch the eye first/have impact?
Click order by zone

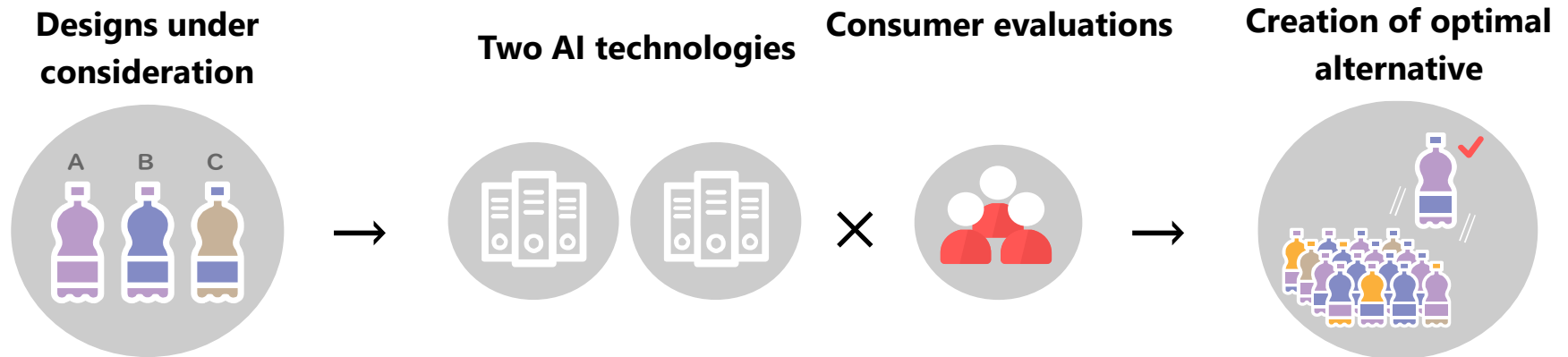


AI Package Optimizer



AI Package Optimizer

AI Package Optimizer create idea of package design (combination) using **AI optimization technology** (genetic algorithm and deep learning) and **Survey Evaluations**.



AI Package Optimizer: How it Works

Creation of materials

Layout



Background



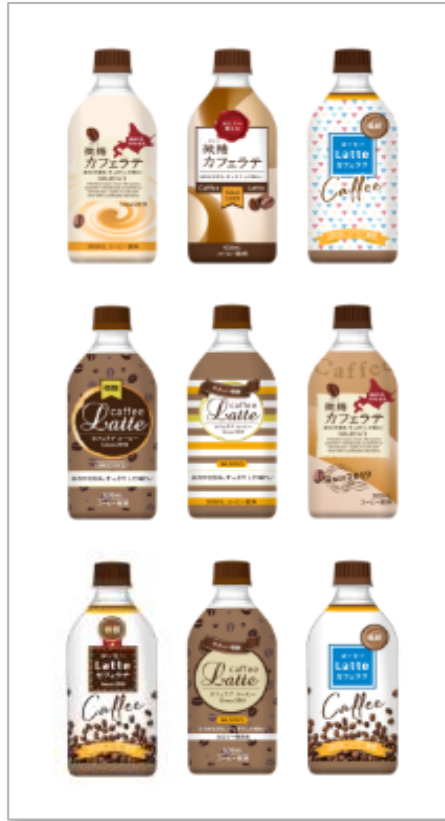
Primary parts



Secondary parts



Initial creation



Search for optimal combination



**Several thousand -
million combinations**

**Repeat the process for Several "Generation" to
identify the optimal design**

AI Package Optimizer: Case Study

Objective

A Japanese food manufacturer is planning to bring an instant noodle product to Vietnam and Indonesia. To develop package designs that suit the preferences of consumers in Japan, Vietnam, and Indonesia.



Creation with similar layout



Creation with similar layout



Creation with similar layout



AI Package Optimizer: Case Study

Final Result

1st Rank

Vietnam



Indonesia



Japan



Vietnam



Indonesia



Japan



Recommended designs if consistency across countries is preferable

AI Package Optimizer: Case Study

Process to Improve Packages

1st
Generation



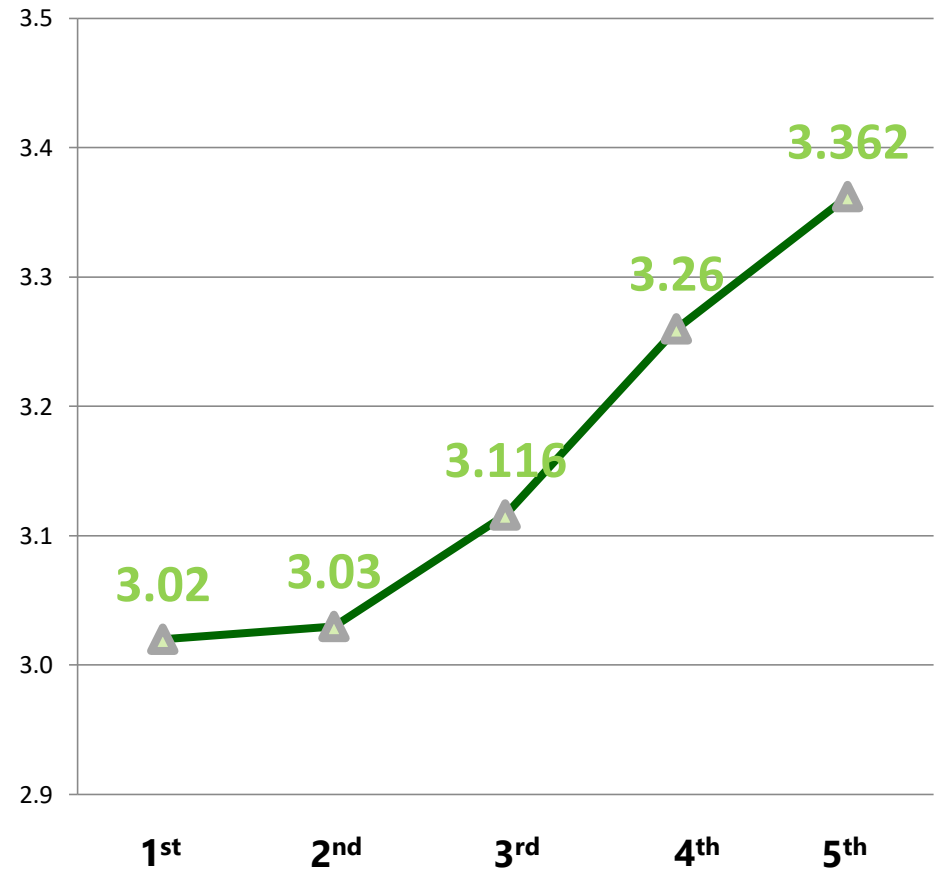
2nd ~ 4th
Generation



5th
Generation



Mean Score of 5 Rating (Best Package from each generation)



Real-time Video Evaluation



Real-time Video Evaluation



Real-time Video Evaluation enables you to **directly identify** the parts/elements such as points liked and disliked on the screen, so is the best for creative evaluations that need to implement the PDCA cycle **speedily**.

This tool enables evaluation by tapping smartphone screen while playing a live video in a web survey on smartphone.

Enables you to understand “in which scene” and “how often it was chosen” by element tapped.

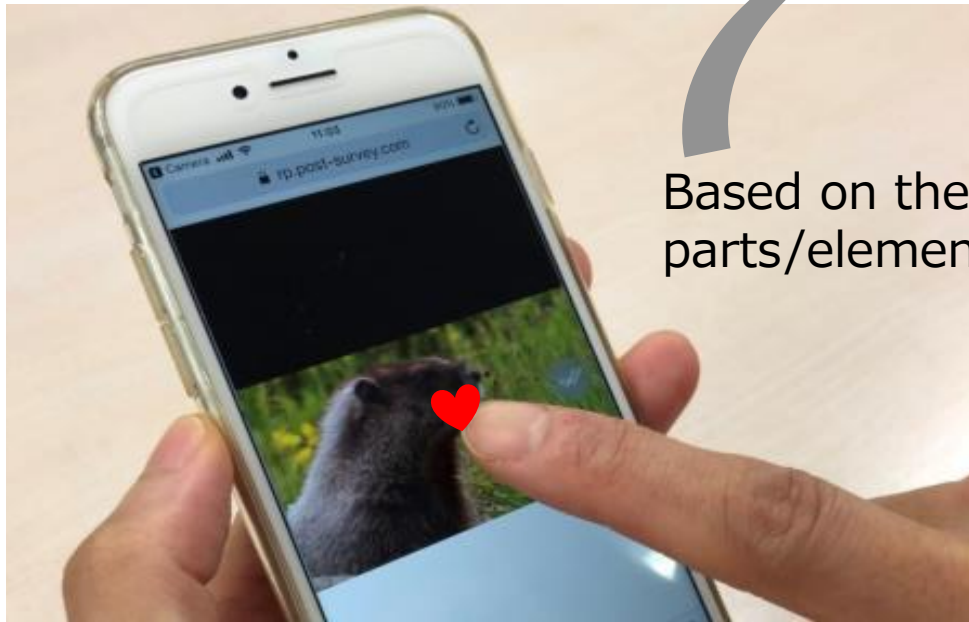
Moreover, allows you to ask dig-deep questions in a questionnaire such as reason for choosing it and favorability etc. for each of tapped elements



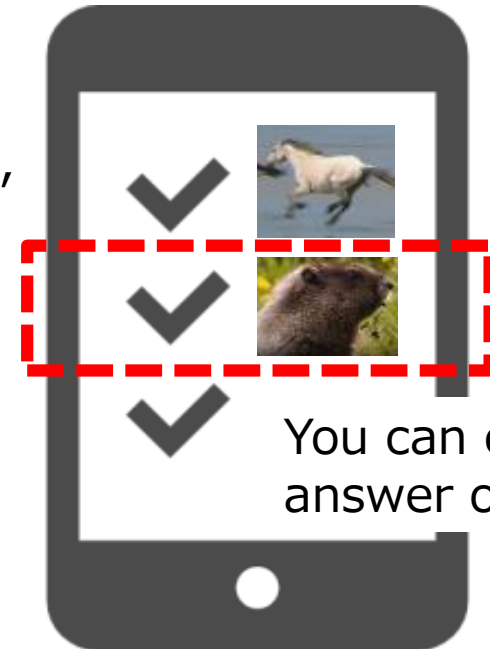
Live Video Evaluation: Image of implementation



Respondents simply tap the “parts/elements that impressed them” and “parts/elements they liked” etc. on the live video embedded in a web survey.



Based on the parts/elements tapped,

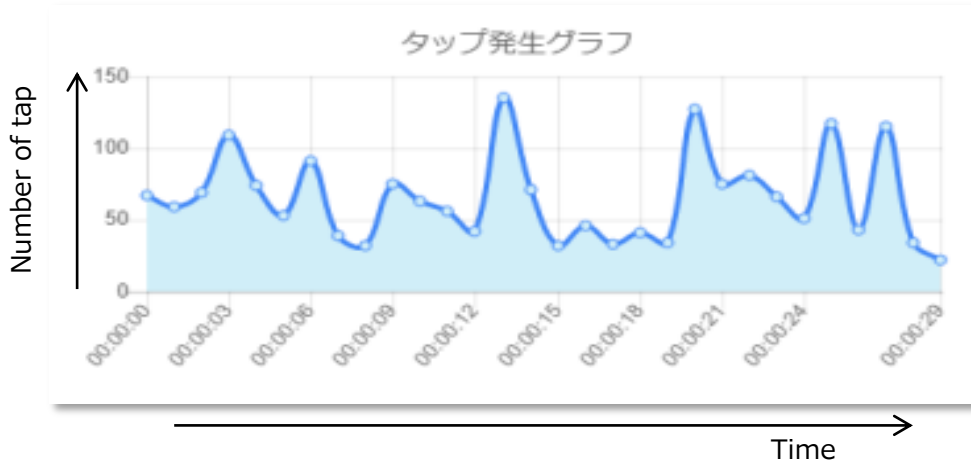


You can create answer options.

Live Video Evaluation: Output Image



Number of tap



Heat map of tapping



Which scene is appealing?

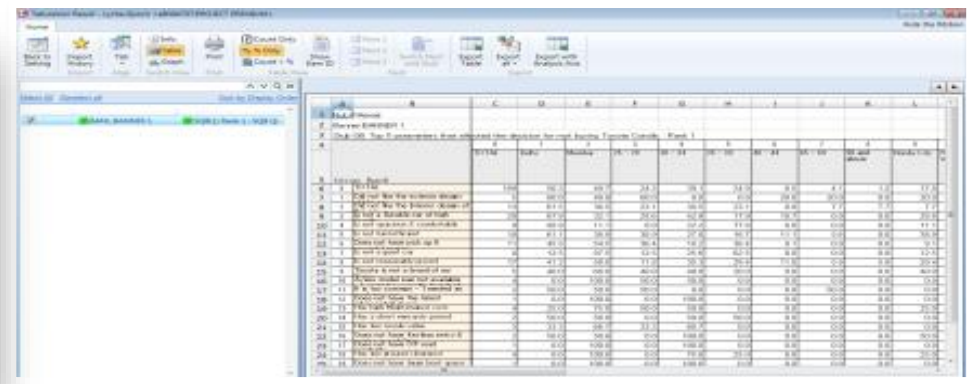
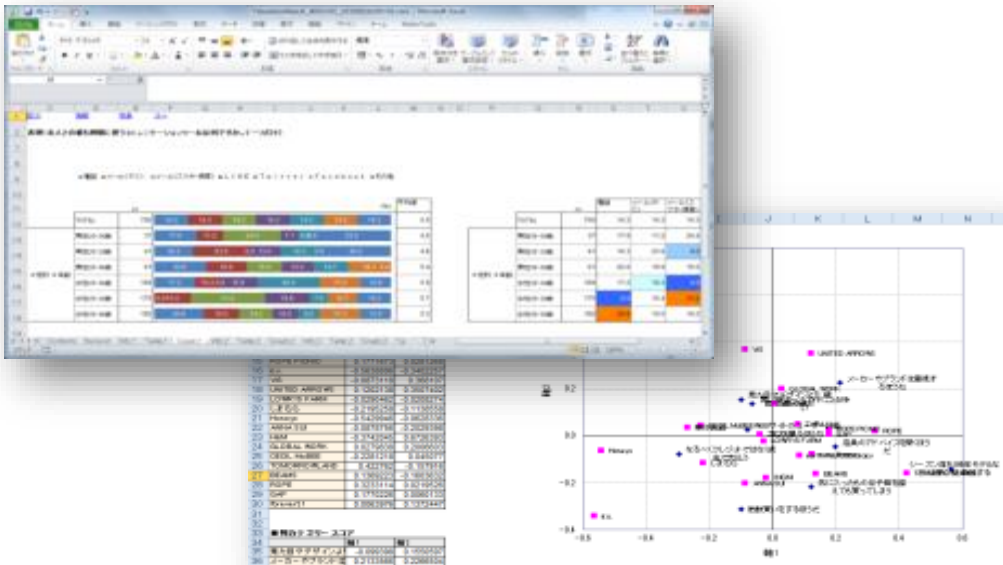
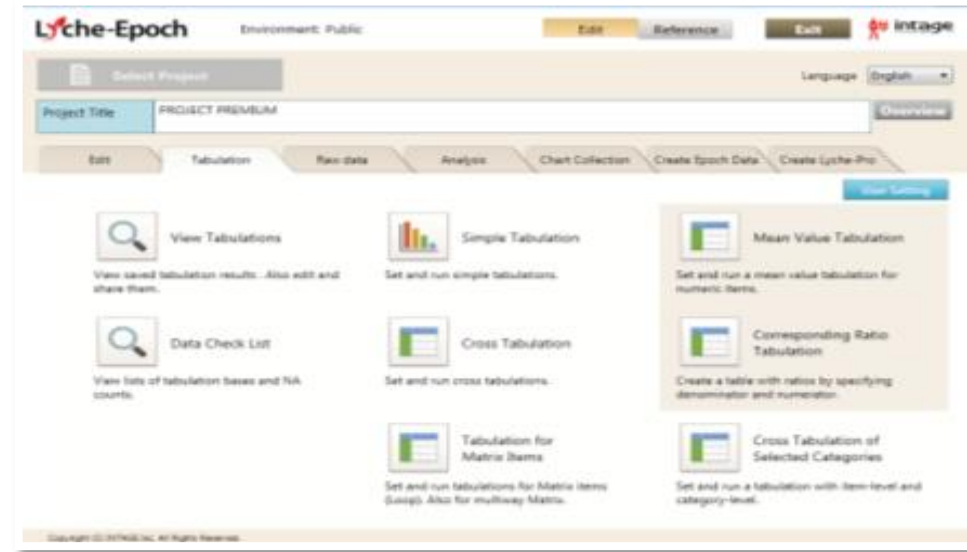
Which element is appealing?

Intage Data Analysis Tool



Benefit

- Easy & Quick tabulations/cross tabs
- Easy view of the data across segments/cuts
- Quick charts/graphs export to excel/PPT





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