

# Navigating the Shift in Consumer Behavior in Asia during COVID-19

MMA Webinar Series

April 29, 2020

In Partnership with:

**inMOBI**



# MMA Purpose



## The People We Serve

### Prime Audience

Pioneering Chief Marketers



## Our Strategic Priorities

### Measurement & Business Impact

Drive marketing effectiveness and the future of measurement for sustainable business growth

### Marketer Org Development

Redefine marketing organization dynamics and future capabilities needed in a data

### Inspiration

Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies

### Advocacy

Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices



## Our Reason for Being

### Purpose

To enable marketers to drive innovation and enduring business value in an increasingly dynamic and connected-connected world.



# Managing Your Questions



Share the Insights

#MMAWeb



# Presenters



Vasuta Agarwal  
Managing Director  
Asia Pacific, InMobi



Jessie Yang  
SVP and GM  
Greater China, InMobi

## Moderator/Host



Rohit Dadwal  
Managing Director  
Mobile Marketing Association  
APAC





# Content

1. Paging Asia: The COVID-19 Impact
2. Understanding Evolving Consumer Behavior and Sentiment in Near Real-time
  - South Korea
  - Australia
  - Singapore
  - Indonesia
  - India
3. Dealing with the Crisis: China's Path to Recovery
4. Marketing Responsibly as a Brand

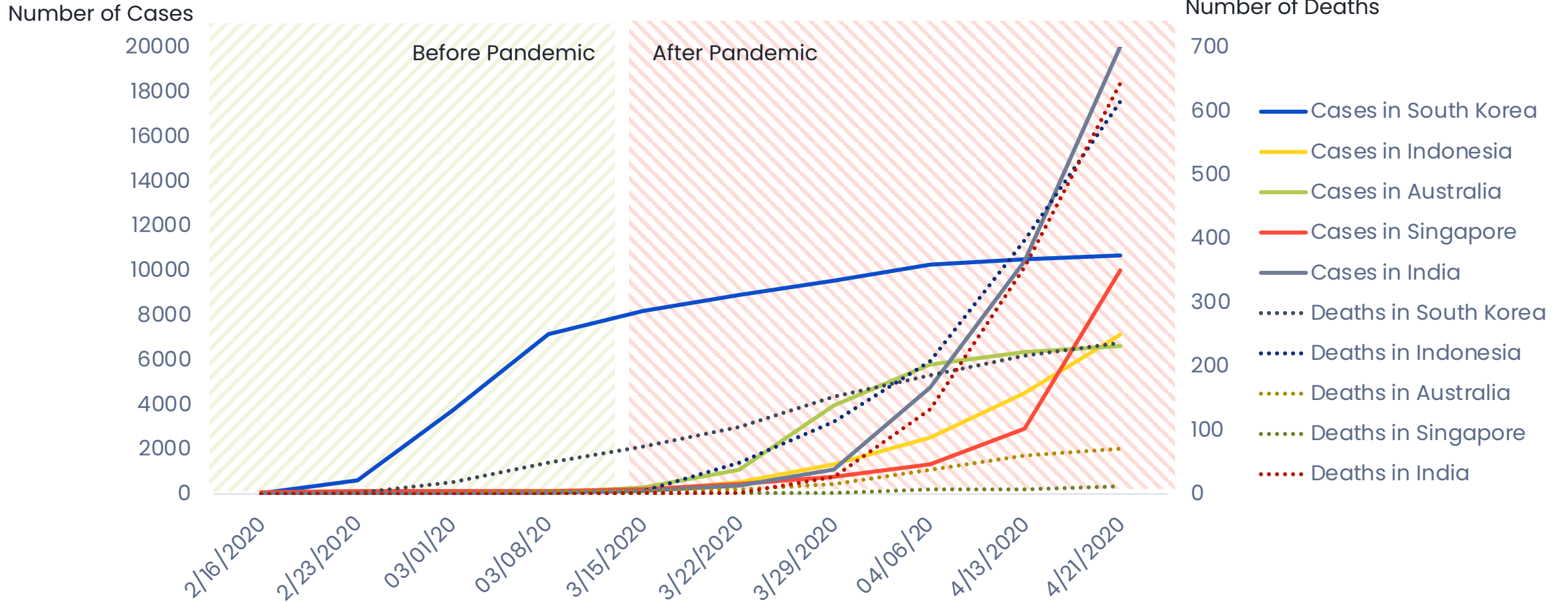


# Paging Asia: The COVID-19 Impact



# The COVID-19 Impact in Asia

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



# Understanding Evolving Consumer Behavior and Sentiment







## Unique Data Signals

SDK data from over 200 million users deliver richest “truth-set” of consumers (location, app level data, and offline and online behavior).



## Accuracy at Scale

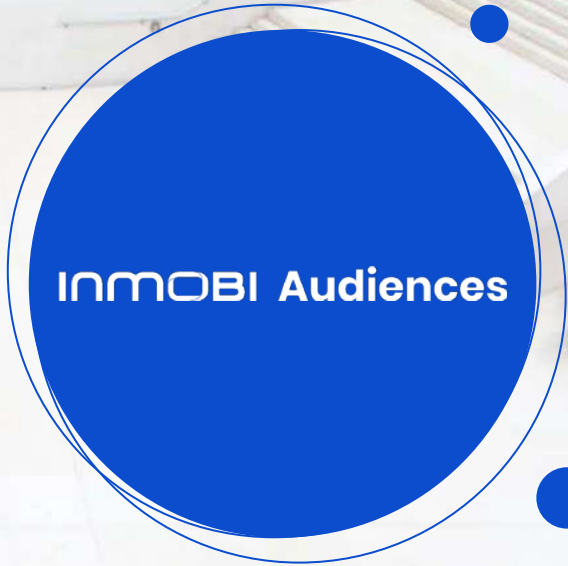
Audiences created using advanced AI that preserves quality of data while delivering global scale.



## Always-on

500+ ready to use audiences, relevant and reflective of changing consumer behavior

Visit us at <https://inmobi.com/audiences>



## Trusted Insights that Keep You Ahead of the Curve and Create Relevant Consumer Connections



### Mobile-First

Connect with consumers wherever they are and capture authentic behavior. Mobile-first approach powers the largest reach and scale.



### Always-On

Use passive data and stated feedback to identify trends and customer needs. Engage and respond in minutes, not months.



### Accurate

Trust the combination of high-quality data and AI-validated direct consumer feedback.

Visit us at <https://inmobi.com/pulse>

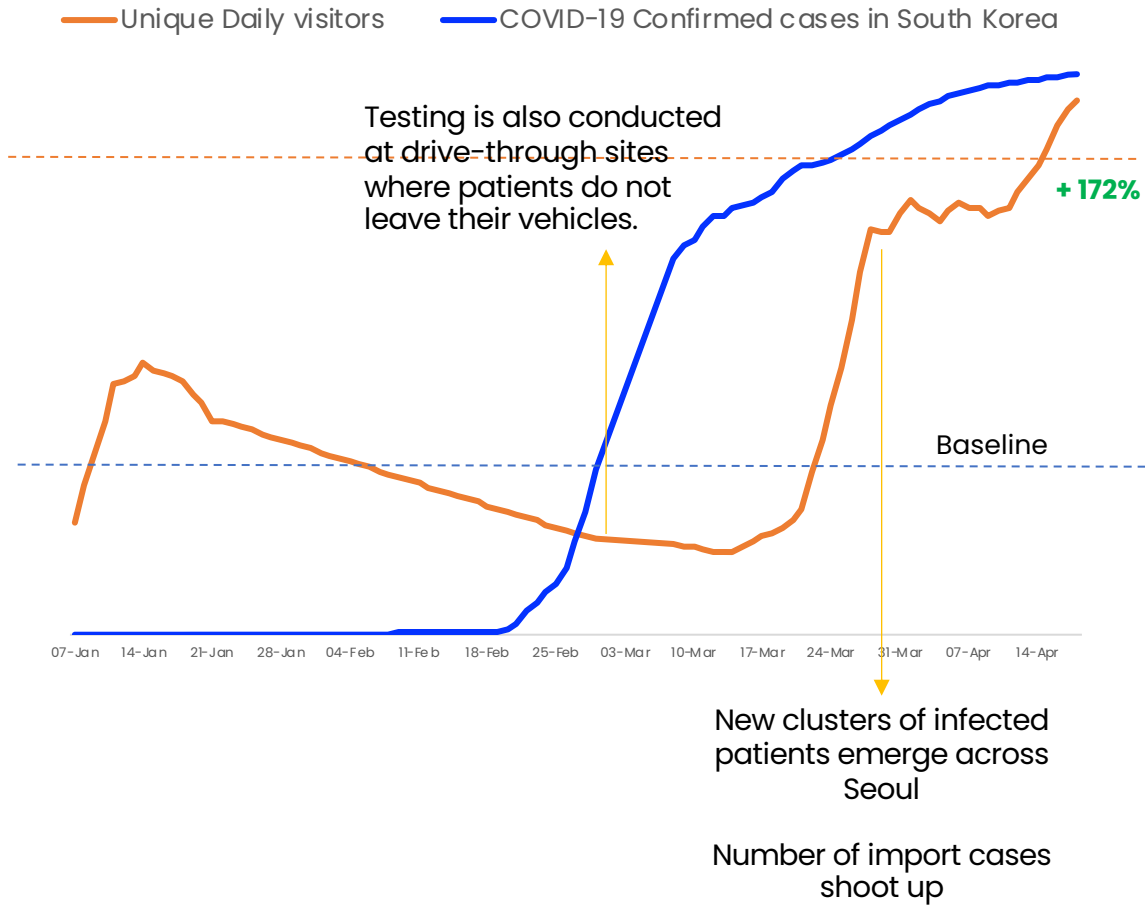


# SOUTH KOREA

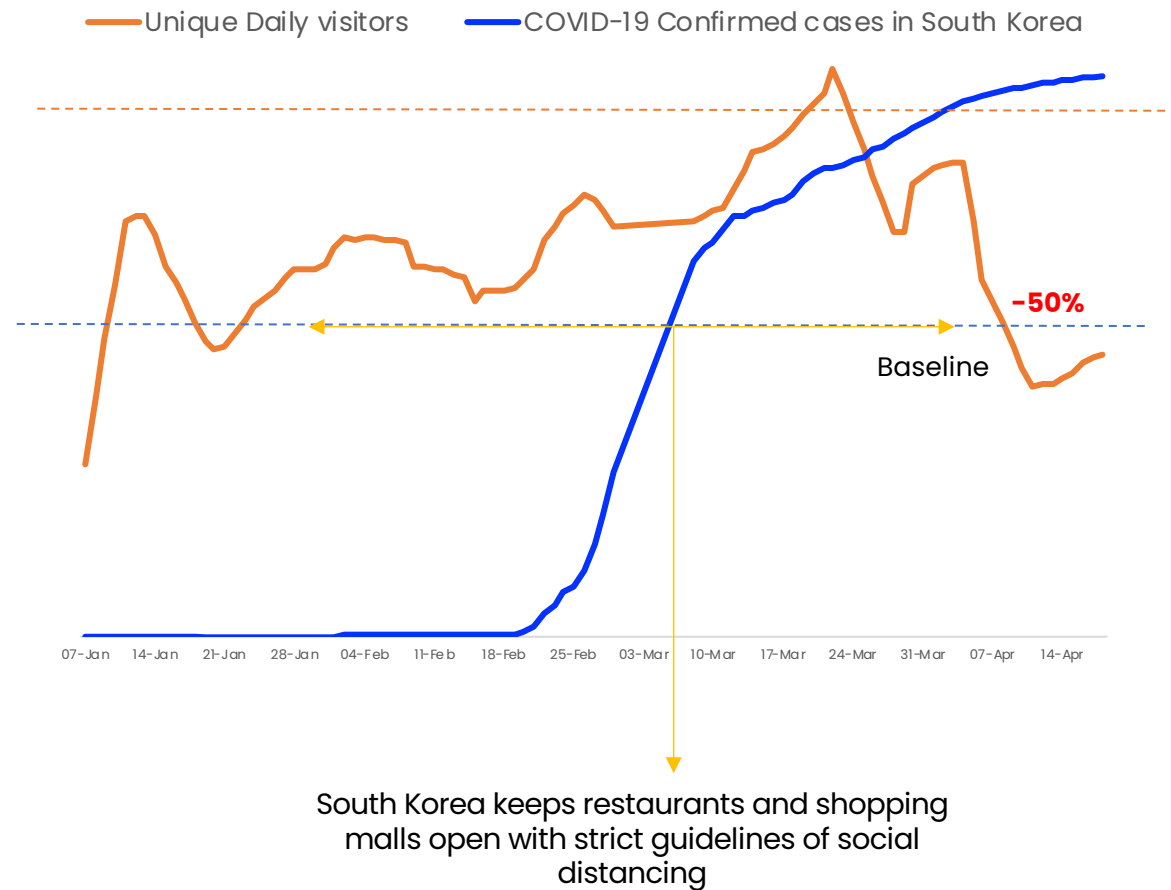


# South Korea

## Footfall at Hospitals



## Footfall at Restaurants



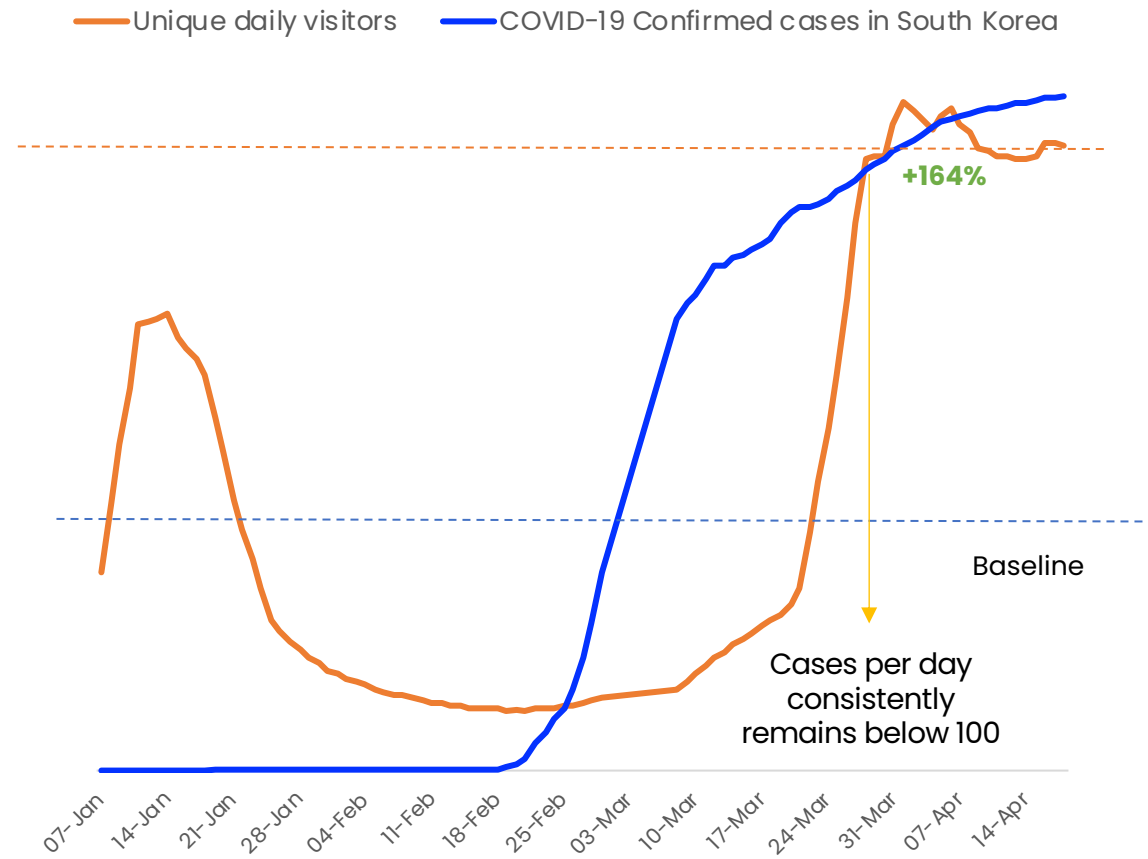


# South Korea

## Footfall at bus and train stations

As South Korea flattens the curve, residents begin to go back to their old lifestyles and adjust to a new normal as indicated by the footfall seen across transport hubs. Activities such as elections, examinations begin to resume as the nation moves towards recovery.

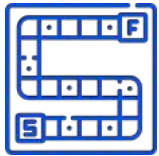
Hand sanitizers are placed at public transport stops and building entrances along with government warning signs since Feb 21.



# South Korea

## Gaming Dominates

South Korea has one of the most popular e-gaming industries in the world, but with the onset of COVID19 several gaming events were left cancelled. South Koreans made the switch to apps from typical cyber cafes which are now considered a hubs for COVID19



Board Games see a growth of **191%**



Educational Games see a growth of **1400%**



Adventure Games see a growth of **139%**



Card Game see a growth of **334%**





# South Korea

As one of the first countries to be affected by COVID-19 outside of China, South Koreans have been making significant changes to their behavior, turning to online mediums

1. News Apps see a surge due to the constantly evolving nature of the pandemic
2. As advisories against large crowd gatherings emerge, South Koreans turn towards Health Apps for their fitness needs
3. Keeping with global trends, online shopping has seen a surge in South Korea



## Health Apps

Witnessed growth of **183%**



## News Apps

Witnessed growth of **640%**



## Shopping Apps

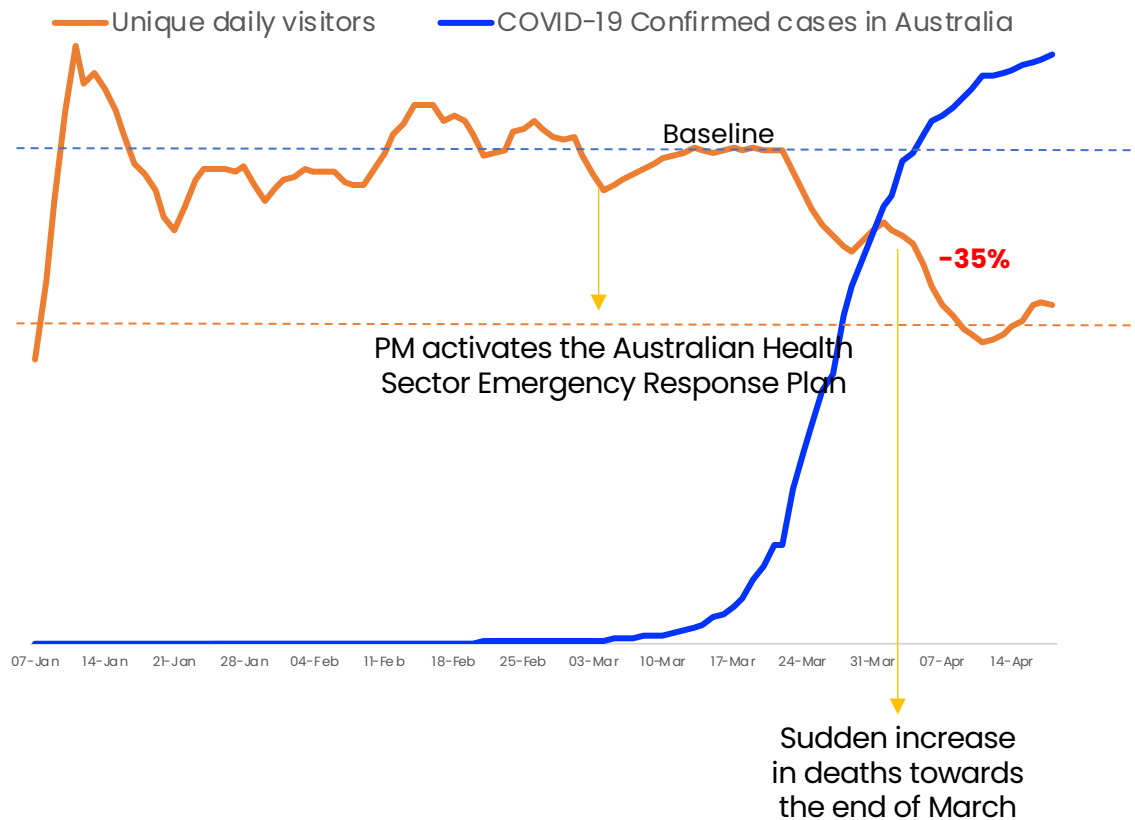
Witnessed growth of **31%**

# AUSTRALIA

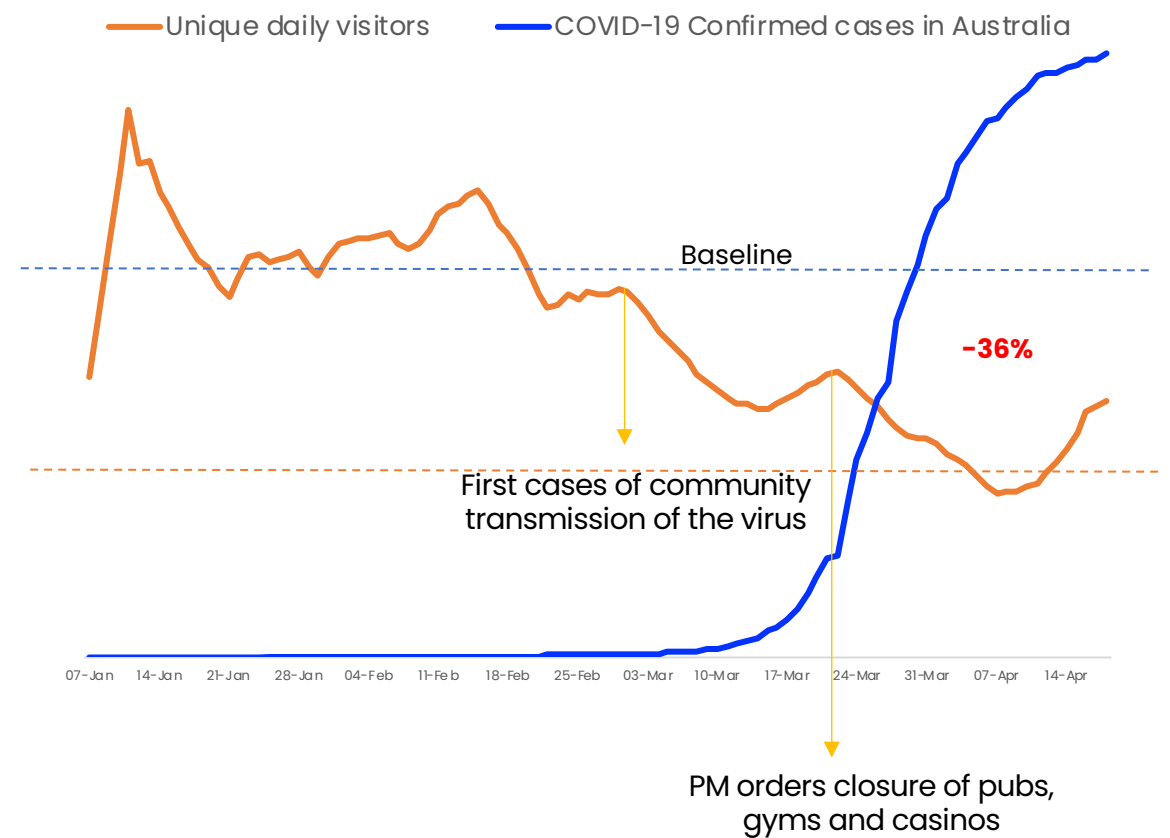


# Australia

## Footfall at Supermarkets



## Footfall at Gyms



# Australia

Apart from an expected surge in news apps consumption, Australia witnessed a surge in both **dating and social apps**, showcasing ways in which users are trying to **stay connected** during the lockdown.

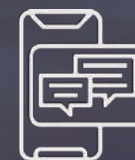
**Educational Gaming Apps** also witnessed a huge surge which could be a result of increasing online learning. This number stands to increase as states across the country embrace a hybrid model of in-person and online learning



**172%**  
Growth in  
**Dating Apps**



**925%**  
Growth in  
**Educational Gaming Apps**



**117%**  
Growth in **Social Apps**



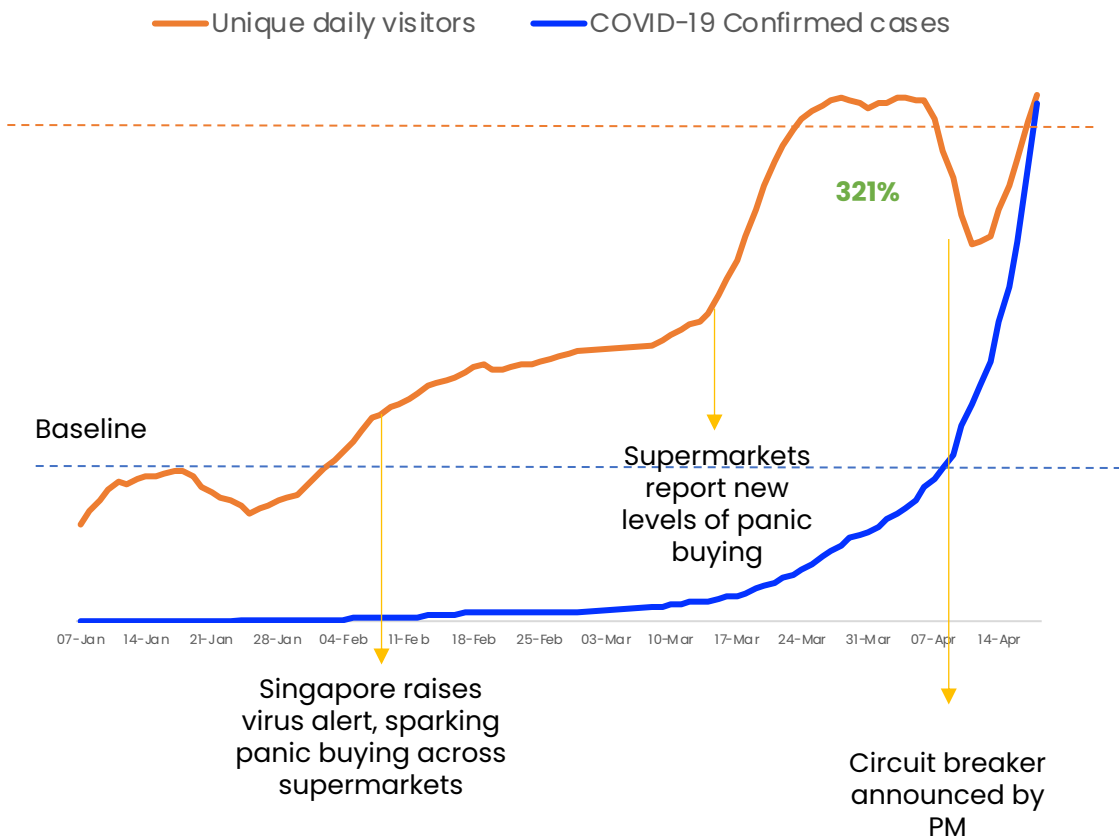
**473%**  
Growth in  
**News Apps**



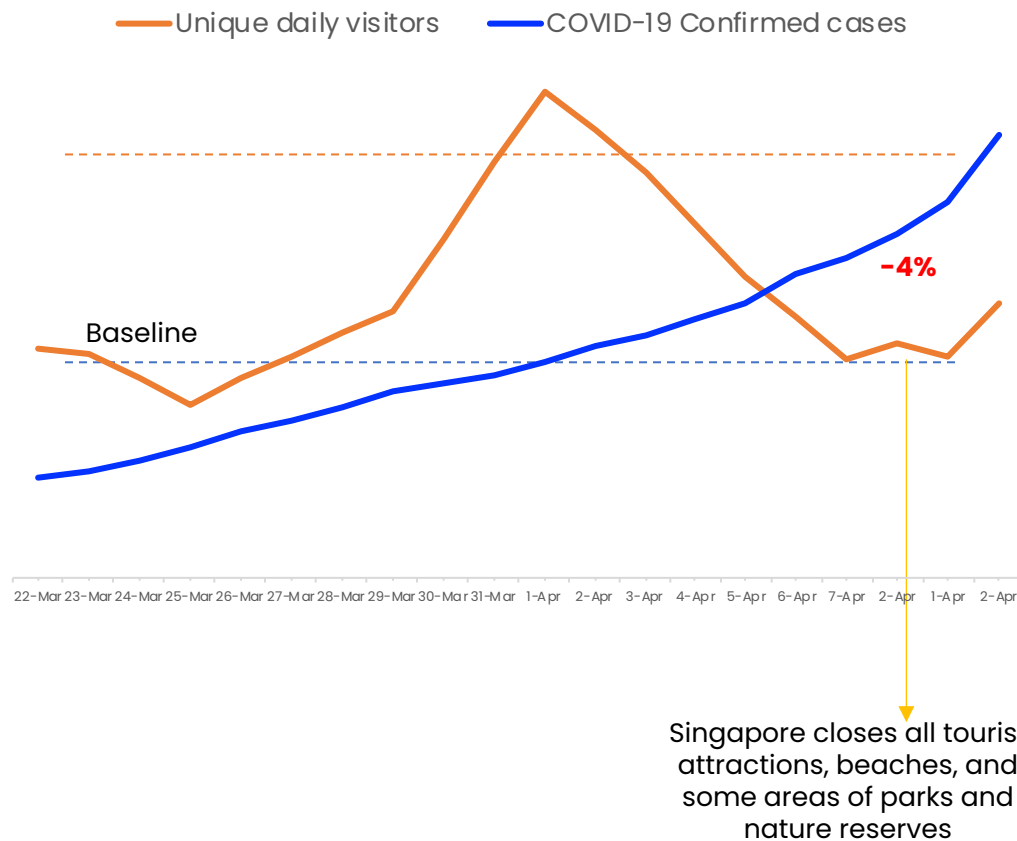
# SINGAPORE

# Singapore

## Footfall at Supermarkets



## Footfall at Parks and Tourist Attractions





# Singapore

When Singapore first announced circuit breaker measures on April 3, people across the island nation took towards **communication apps** to stay in touch with colleagues, families and friends.

Trivia gaming apps and health app also witnessed a significant surge as Singaporeans were cautioned to stay indoors



**3700%**  
Growth in  
**Communication  
Apps**



**470%**  
Growth in **Trivia  
Gaming Apps**



**43%**  
Growth in  
**Music Streaming  
Apps**

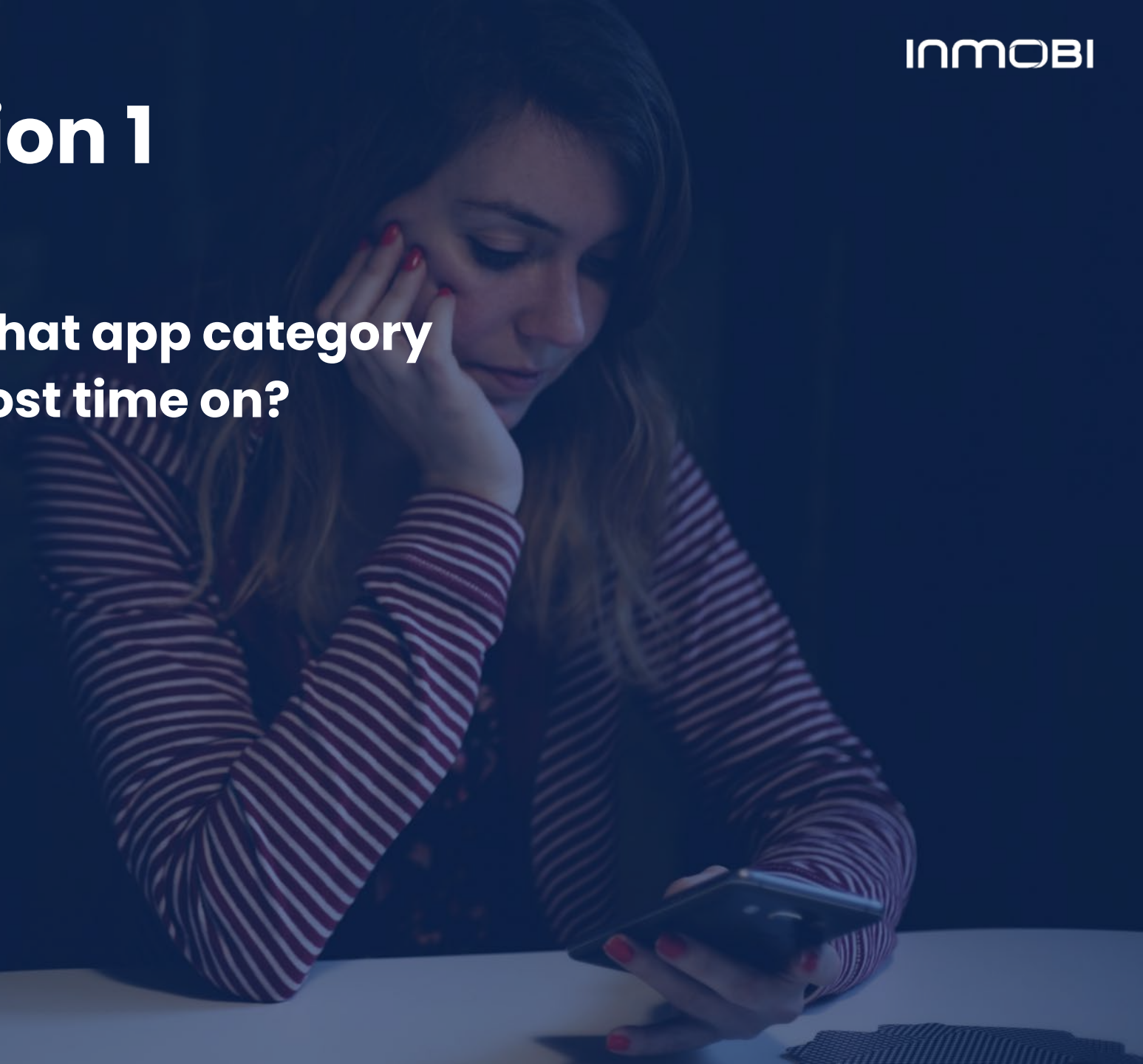


**146%**  
Growth in **Health  
Apps**

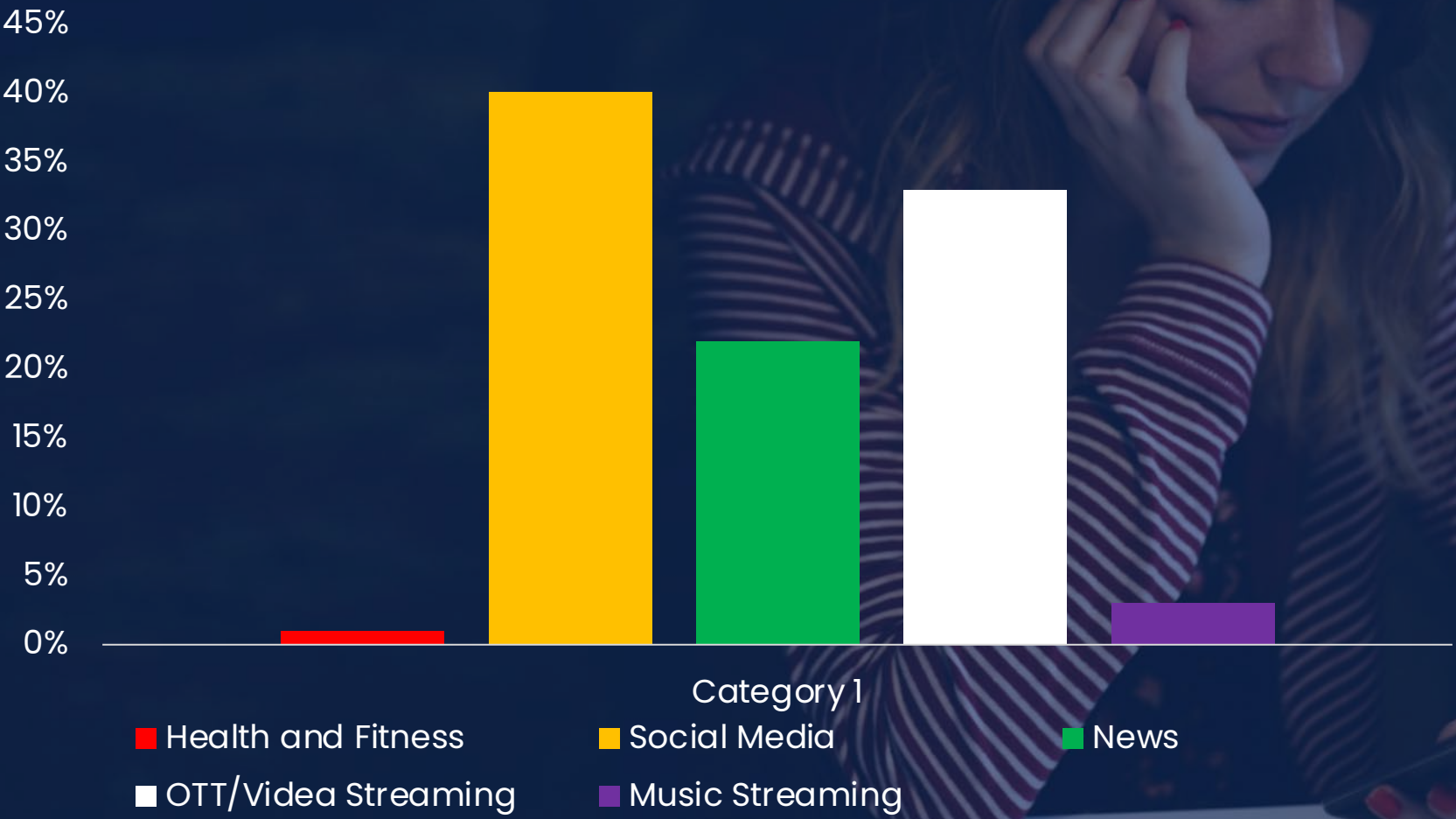
# Polling Question 1

**Since the lockdown, what app category have you spent the most time on?**

- a) Health and Fitness Apps
- b) Social Media Apps
- c) News App
- d) OTT/Video Streaming Apps
- e) Music Streaming Apps



# Results for Polling Question 1





# INDONESIA





# Indonesia

Awareness. Understanding. Outlook.

85%

Are unsure of  
COVID19's  
outbreak source

9%

Understand and  
identify  
symptoms

60%

Are practicing  
social  
distancing

85%

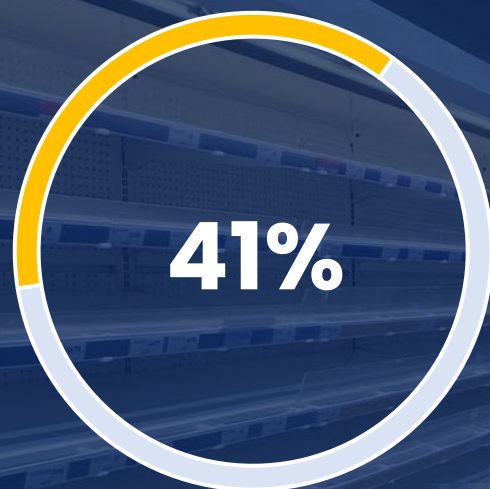
Cannot identify  
all preventive  
measures

The survey had a total of 1056 unique and valid responses were collected during the last week of March

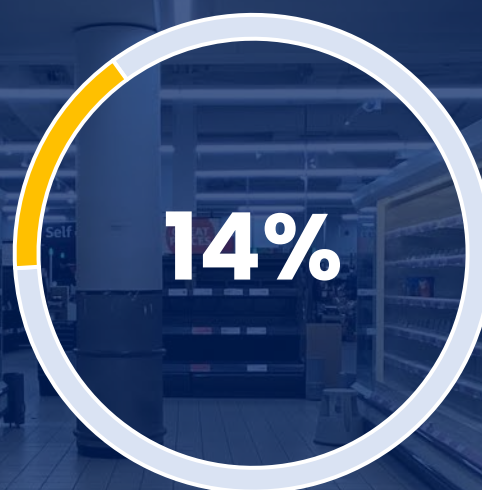


# Indonesia

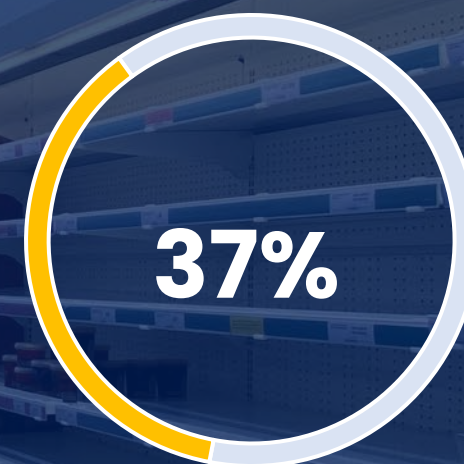
## Challenges: Essentials and Lifestyle



Found scarcity of  
sanitizers & handwash



Found scarcity of  
food essentials



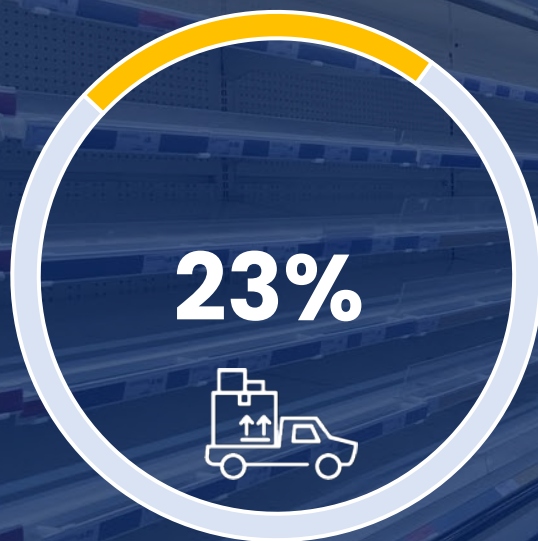
Limited eating  
out/ordering in

The survey had a total of 1056 unique and valid responses were collected during the last week of March



# Indonesia

## Challenges: Shopping Preferences and Spends



Hoarded up on  
essentials



Chose Quality  
over Price



Are increasing or  
decreasing spends

The survey had a total of 1056 unique and valid responses were collected during the last week of March



INDIA



# India

## Overall Consumer Sentiment

Fourteen days into the month-long 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**



**Find Social distancing Critical**



**Expect losses to their industry/business**



**Appreciate the 21-day lockdown measure**



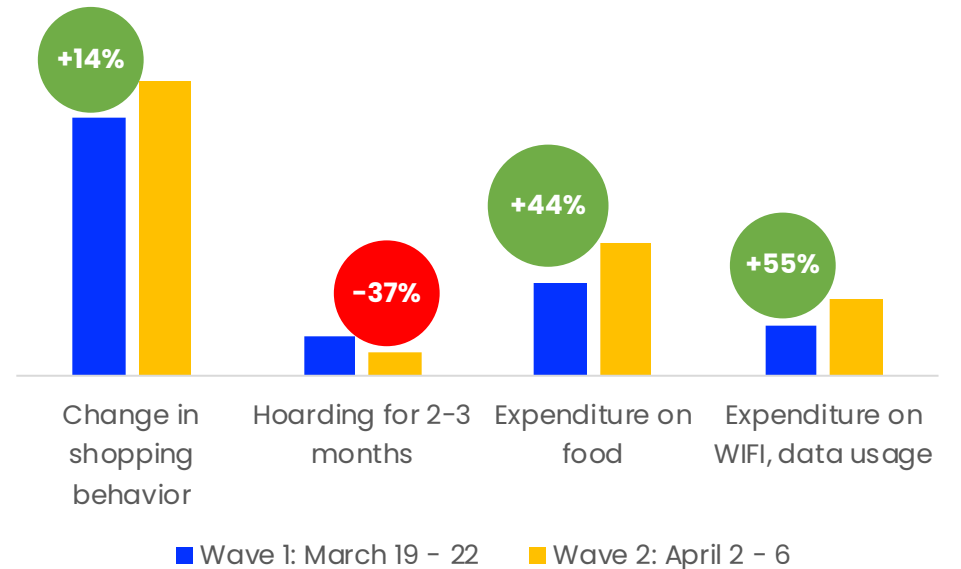
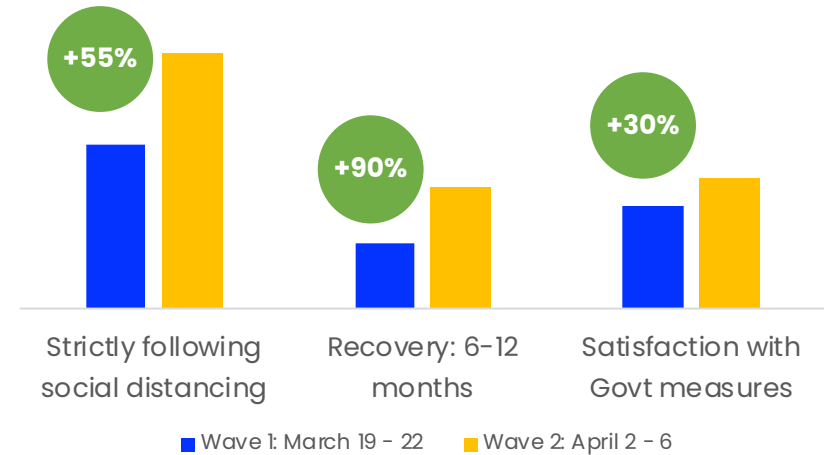
**Are concerned about daily wage earners**



# Evolving Consumer Sentiment in India

Consumer understanding and behavior continues to rapidly shift on a week by week basis as information about the pandemic continues to emerge

## Awareness, Understanding and Outlook



# Media Consumption across Generations



Gen Z



**41%**  
consume  
**News**



**35%**  
are  
**Gaming**



**33%**  
consume  
**Music**



**31%**  
are on  
**Social Media**



Millennial



**46%**  
consume  
**News**



**36%**  
consume  
**OTT**



**29%**  
are on  
**Social Media**



**25%**  
are  
**Networking**



Gen X



**39%**  
consume  
**TV**



**17%**  
are on  
**Social Media**



**16%**  
are on  
**OTT**



**10%**  
are  
**Gaming**



# Understanding China's Path to Recovery

A fireside chat with Jessie Yang



# China's Path to Recovery

A lot of the data we've seen are from countries that are amidst dealing with COVID19, can you tell us about how the offline and online behavior of consumers have evolved in a post COVID world in China?





# China's Path to Recovery

Different verticals have been affected differently during this crisis, which verticals do you think have the most potential to make a come back?

# China's Path to Recovery

What are some of the marketing and communication examples that you've seen Chinese brands embrace to come out stronger on the other side?



Navigating this  
New Reality



# Polling Question 2

**How should brands react to this new reality**

- a) Brands should not market or advertise at all
- b) Brands should excessively focus on sales-led communication
- c) Brands should focus on purpose-led communication
- d) None of the above



# Results for Polling Question 2

80%  
70%  
60%  
50%  
40%  
30%  
20%  
10%  
0%



- Brands should not market or advertise at all
- Brands should excessively focus on sales-led communication
- Brands should focus on purpose-led communication
- None of the above



# Purpose-led Brand Communication

What do consumers expect from brands during COVID-19?

**8%**  
of consumers

alone want brands to stop advertising

- Brands should inform people of what they're doing to face the situation
- Brands should Inform how they are helping consumers in their daily lives
- Brands should not exploit the situation

**3 in 4**  
consumers believe

How can brands drive responsible marketing and advertising?

- 1. Long-term Approach:**  
Marketing and Advertising responsibly
- 2. Mental Brand Equity:**  
Addressing core concerns in times of uncertainty
- 3. CSR/ PSA Initiatives:** Driving awareness through information

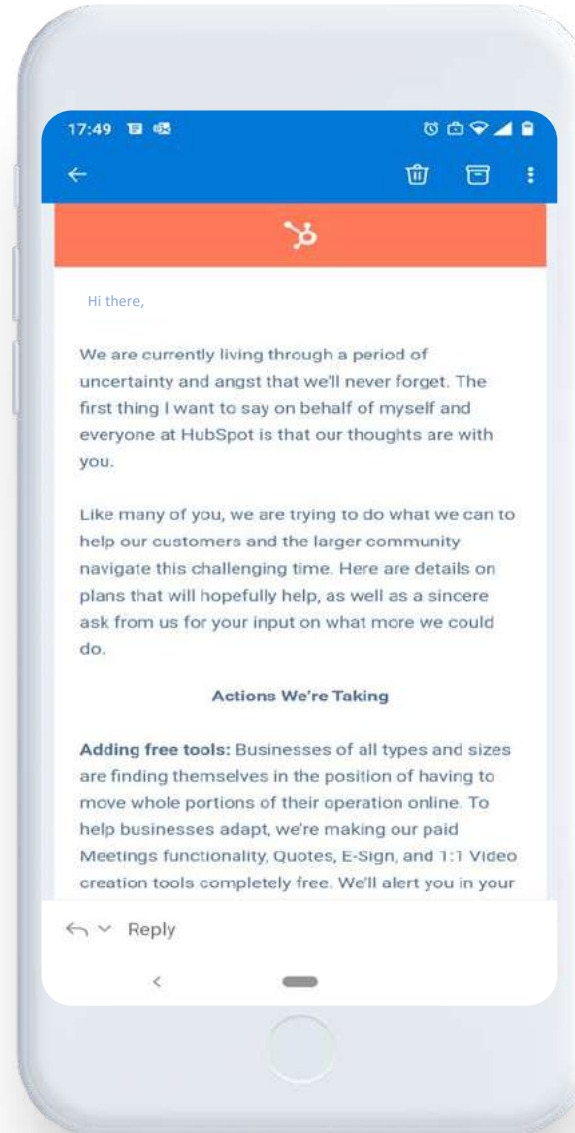


# Leveraging owned and earned media to stay connected

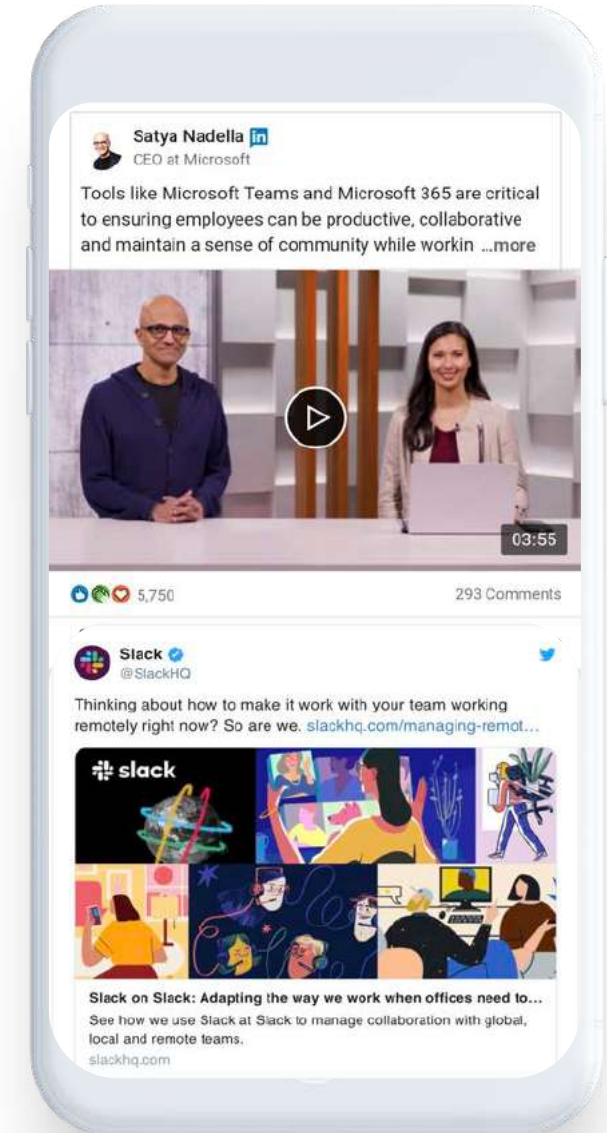
Social



E-mail



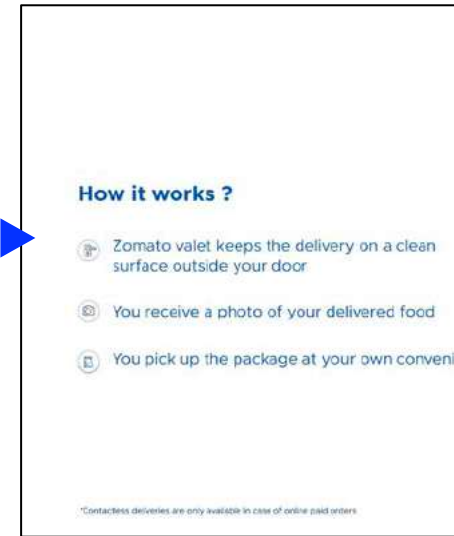
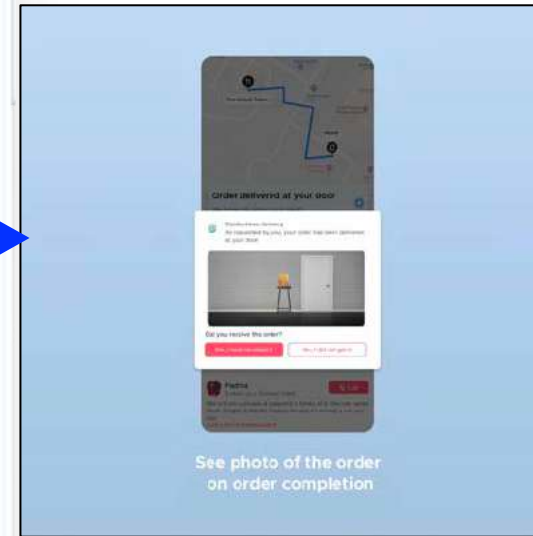
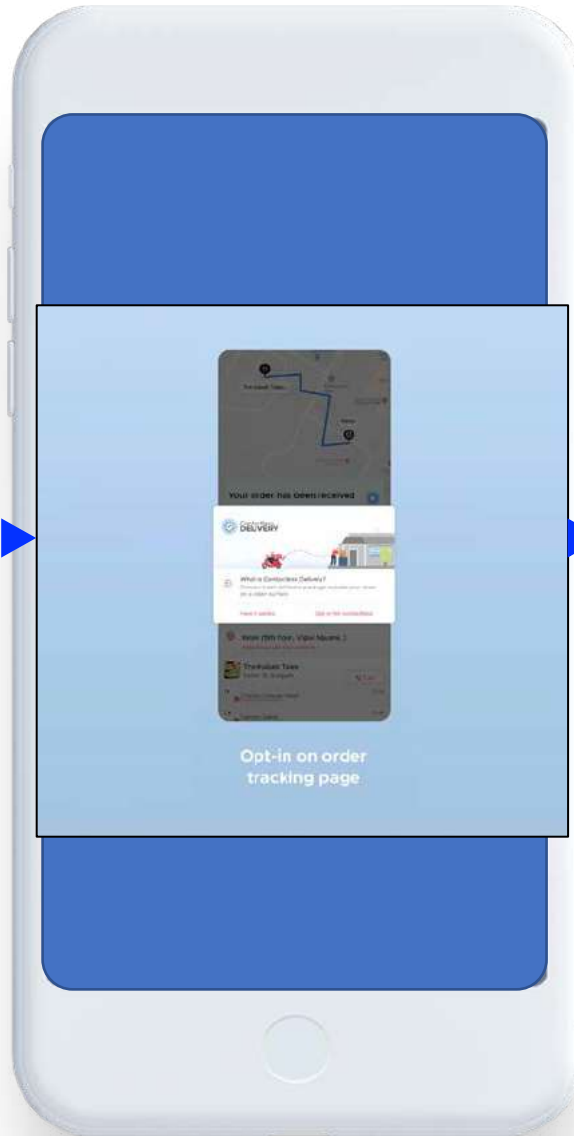
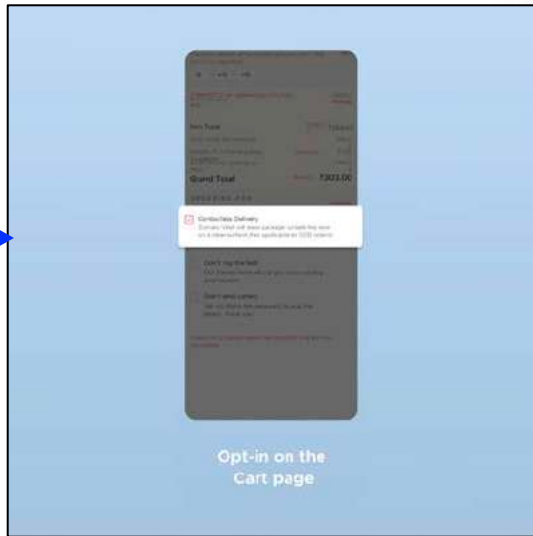
Video



# Providing reassurance in times of uncertainty

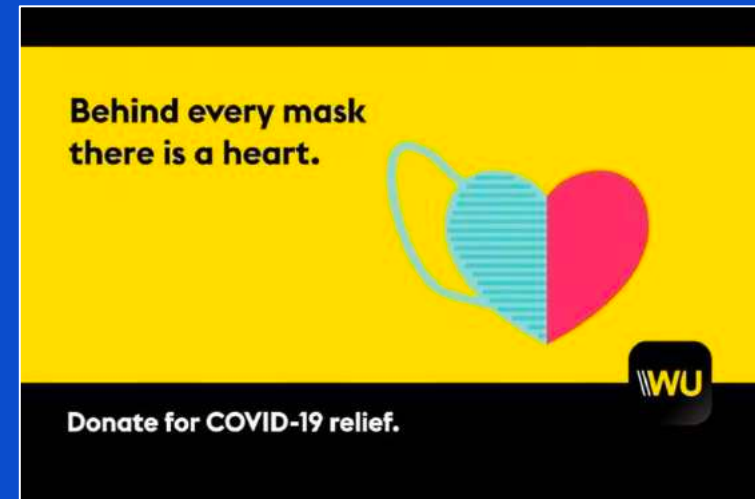
Zomato introduces contactless delivery for Indian citizens

Leverages owned, earned and paid media to reassure consumers

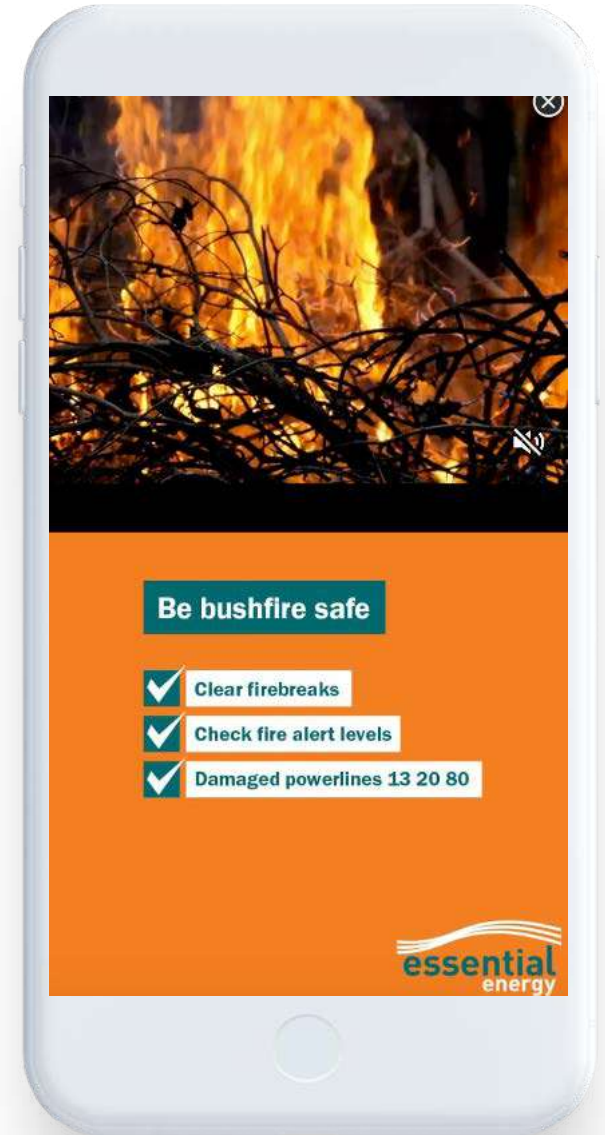




# Utilizing digital channels to promote CSR activities

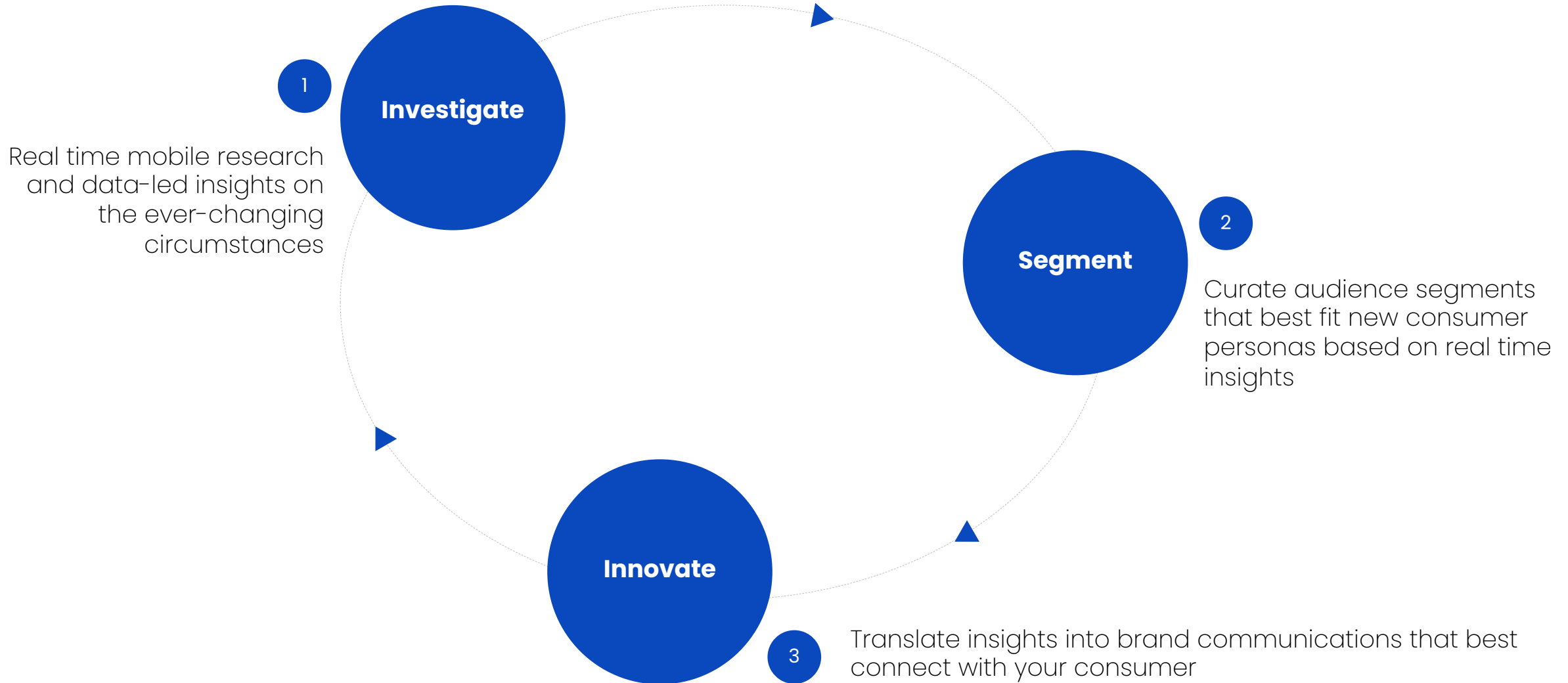


# Engaging consumers on their preferred channel: Mobile





# Bringing together all the tenets of media buying to power new brand communication is essential



# Q&A

Reach out to us at  
[mobilemarketing@inmobi.com](mailto:mobilemarketing@inmobi.com) to  
for customized insights and  
mobile media trends



# Take a Seat at the Table

- [MMA programs](#) and working groups consist of executives who discuss key issues for a specific industry segment, technology or business issue. The programs and working groups meet on an ongoing basis to develop and execute industry initiatives that reflect the needs of their initiative area and membership.

Attribution Analysis



Currency Measurement



Internet of Things



Location



Mobile Messaging



Mobile Native Advertising



Mobile Programmatic



Mobile Shopper Marketing



Mobile Video



Privacy



- To join a program, contact [committees@mmaglobal.com](mailto:committees@mmaglobal.com).

# Participate in the Conversation

MMA Smartbrief



Mobile Smart Fundamentals



MMA LinkedIn Group



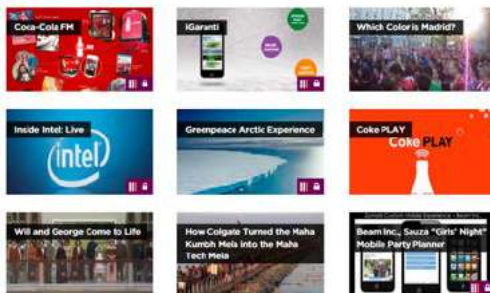
Get Social with MMA



## Getting Great at Mobile

Q7. What do you think was the reason for the outbreak of corona-virus?

Case Study Hub



The Mobile Marketing Playbook



Guidance Reports and Benchmarks



Webinar Library







# Upcoming MMA Webinars

- **May 5** – Supporting Businesses Navigate Through the Current Challenges of Covid-19
- **May 6** – Responsible Marketing (*Vietnamese*)
- **May 11** – COVID-19 Impact On APAC Industry Sentiment
- **May 21** - Powering Digital Transformation in China

<https://www.mmaglobal.com/webinars>



**Thank You!**