

The mood of the nation

What the online differences between the green, yellow and red zones tell us about locked-down India

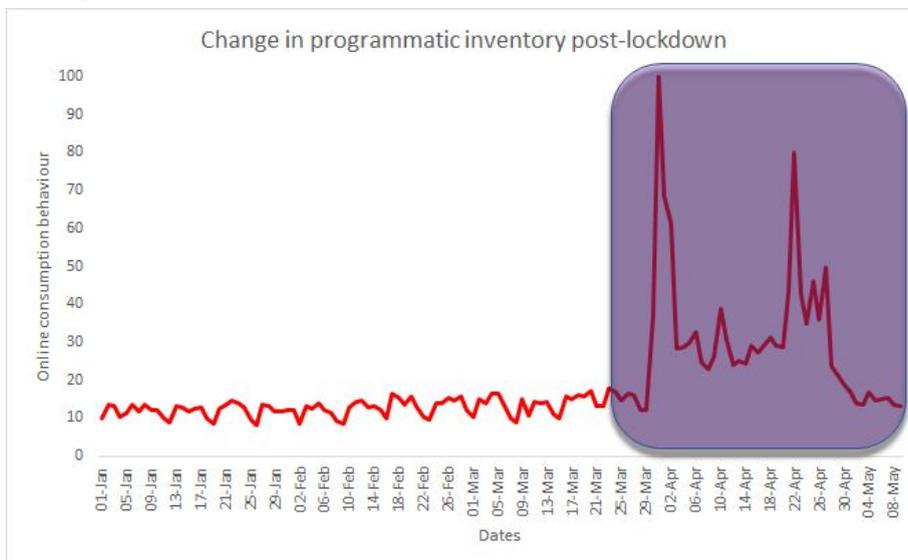
MiQ's 'Mood of the nation' report is based on insights around the changing online behavior of Indian citizens and aims to provide brands with the most pertinent advice on how they can adapt their media plans to the new normal.

Though the general uptick in digital consumption remains prominent across the country, there are considerable regional differences in online content consumption. That's why this report looks at how the different regions are faring, especially the differences across the red, yellow and green zones as described by the Indian government, and what this means for advertisers.

The changing digital opportunity

After the implementation of the lockdown, we saw a 132% increase in biddable programmatic inventory.

Change in the biddable opportunities online in India, 2020



Source: APN console stats, 1 Jan 2020- 9 May 2020

To provide a global perspective, the post-lockdown increase in digital activity in the US stands at 28% and at 46% in the UK. Among developing economies, China registered an 87% increase in the online opportunity whereas in Singapore the interest only rose by 20%.

Increased traffic on both mobile devices and desktops have contributed to this overall increase in the digital opportunity, but with the government relaxing some restrictions during

phase 3 of the lockdown, we are seeing a minor decrease in the mobile consumption stats though activity on the desktops continue to remain strong.

Average biddable opportunities per day by device types

Device type	Phase 3	Phase 2	Change
Desktops & Laptops	3.25 Bn	3.01 Bn	8.3%
Media Players	0.25 Mn	0.24 Mn	4.6%
Mobile Phones	9.94 Bn	10.05 Bn	-1.1%
Tablets	118.88 Mn	119.77 Mn	-0.7%

Source: AppNexus console- platform inventory stats, 9 April 2020 - 9 May 2020

Content consumption across domains has also seen significant change. In addition to business, industry, and news that have seen a spike of interest during the lockdown, activity on food and drinks, CPG, and arts and entertainment domains have been constantly trending upwards.

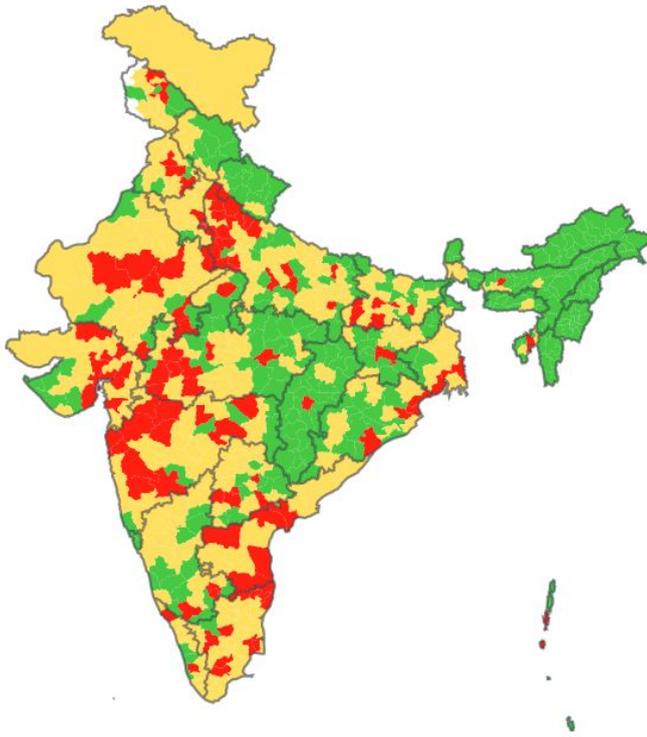
Changes in activity across different content categories online:

Content category	Change pre -lockdown - Phase 1	Change pre -lockdown - Phase 2	Change pre -lockdown - Phase 3
Arts & Entertainment	221%	364%	25%
Books & Literature	125%	132%	59%
Business & Industry	475%	318%	31%
Education	10%	-6%	-17%
Finance	140%	71%	3%
Food & Drink	203%	297%	176%
Games	-9%	12%	-7%
Health	46%	130%	32%
Home & Garden	65%	130%	78%
Lifestyles	92%	157%	53%
News	251%	189%	35%

Recreation	44%	217%	-4%
Shopping	-34%	-17%	-31%
Sports	419%	133%	-27%
Travel	-23%	162%	-44%

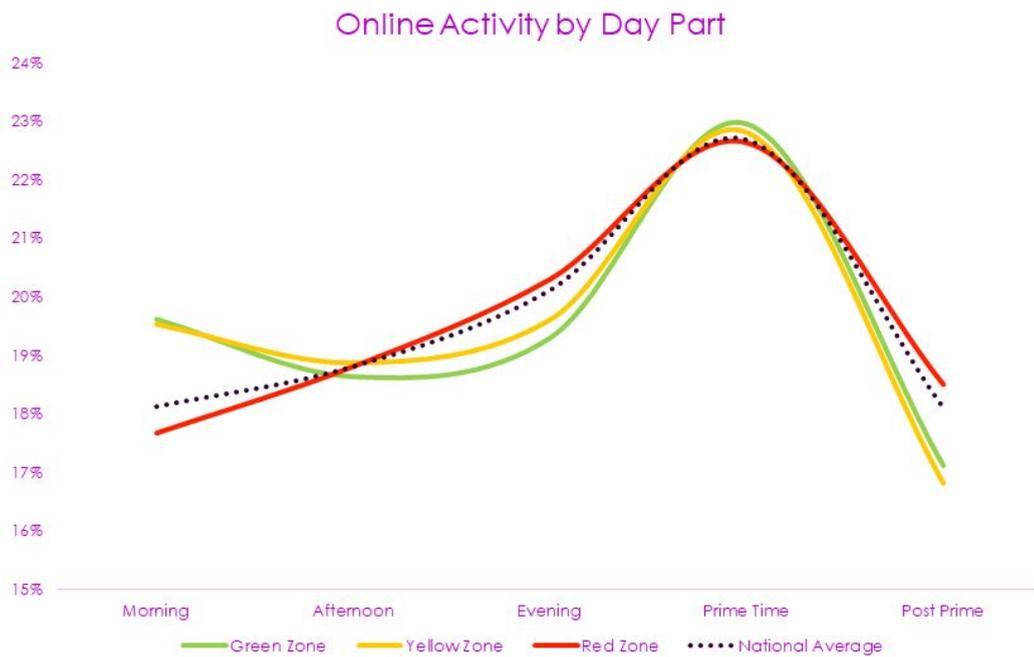
Source: AppNexus console stats, 1 Jan 2020 - 9 May 2020

The COVID-19 zones:



Source: <https://www.covid19india.org/>

Regional disparities in content consumption:



Source: Online browsing behavior data, April 2020

Insight	Green	Yellow	Red
Browsing by day part (compared to national average)	Usage over indexes in morning hours, prime time being the peak	Usage over indexes in morning hours, prime time being the peak	More active in office hours (afternoon and evening) and post prime hours
Top Domains Categories	Arts & Ent, Health, Books & Literature, World Localities	Lifestyle, Arts & Entertainment, Pets & Animals	Food & Drink, Finance, Travel
Top Audience segments	Entertainment - TV Viewers (8X*), Intent - Auto Buyers (5.8X), Interest - Home & Garden, Home Improvement, DIY/Handicraft (3.7X), Entertainment interest - Books (4.6X), Retail Intent - Shopping -	Entertainment - TV Viewers (10X), Music Lovers (5X), Auto Aficionados (7X), Purchase intent - video game consoles (3X), Lifestyle segments - hobbies and interests (2X), Home improvement (DIY and	Travel intent - frequent (3X), Travel intent - luxury (2X), Weekend travelers (2.5X), Flight Booker persona (2.2x), Holiday persona (4X), Interest - Cruises (1.7X), Luxury shopping intent (1.6 X), Wants to buy rented holiday

	Bargains (2.4X), Interest - Consumer Electronics (2.3X)	handicraft), Shopping bargains and discounts (2.5X), Purchase intent - computers and laptops (2X)	homes (1.7X), International travel category (1.5X), Entertainment intent - books (5X), Entertainment interest - Video on demand (1.8X), Personal finance - loan and credit (2.6X), Foodies persona (1.2X)
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Source: Online browsing behavior data, April 2020

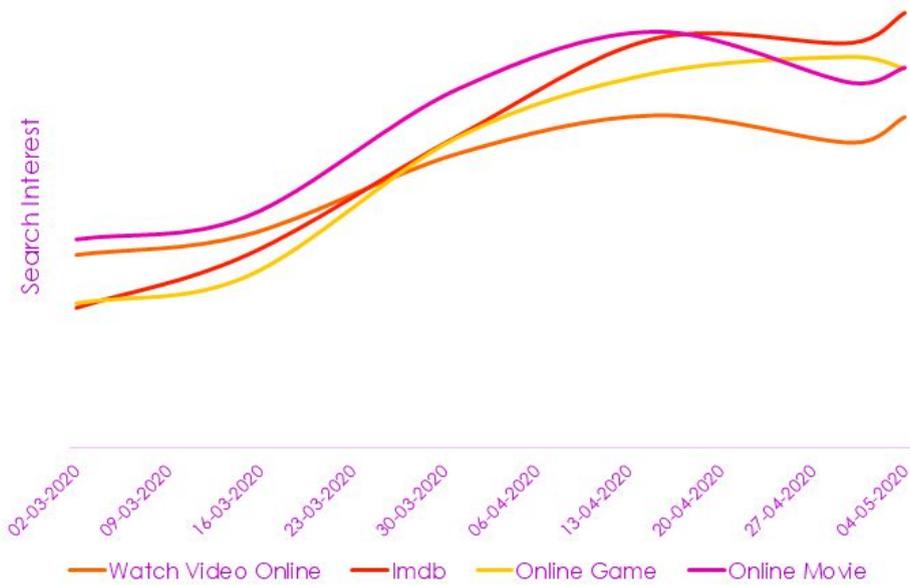
Trending search keywords across categories:

Domain Category	Top Keywords	Change post lockdown
Arts & Entertainment	“culture”, “movies”, “video”, “quiz”, “songs”, “games” and “Bollywood”	+50%
Health, Lifestyle, and Shopping	“beauty”, “workout”, “exercise”, “online shopping”, “recipes” and “cook at home”	+30%
Finance, Travel	“stocks”, “trading”, “currency”, “economy”, “when can we travel”	+20%
Finance (high ticket purchase)	“buy car”, “buy house” “car loan”, “home loan”	-50% +5%

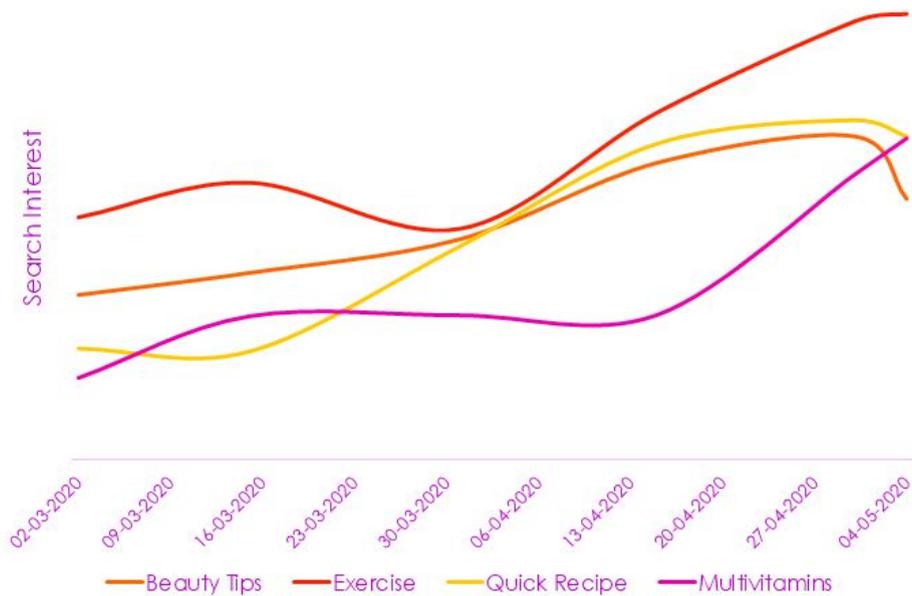
Source: Google Trends Data, India, Weekly Average, March 2020 to May 2020

Google trends for top keywords across categories:

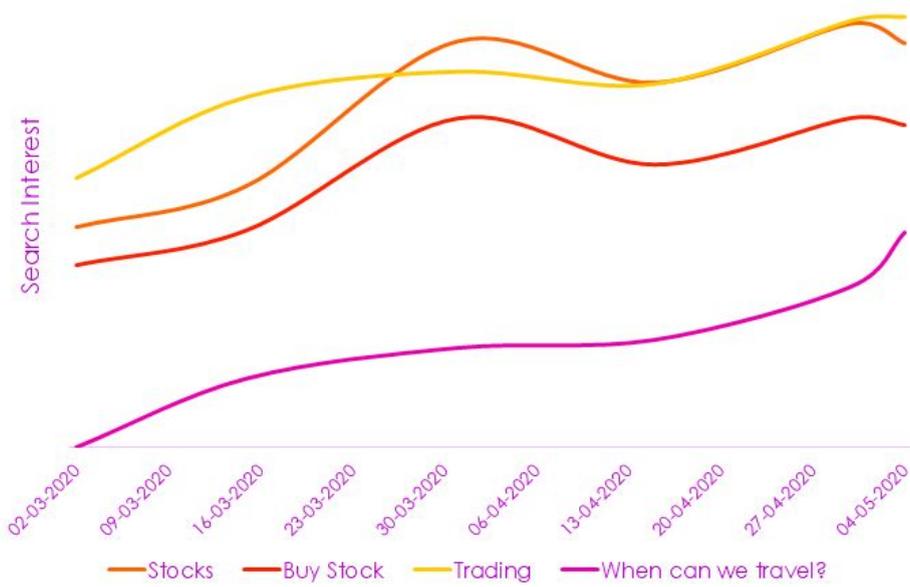
Increase in Search Interest for Entertainment Keywords



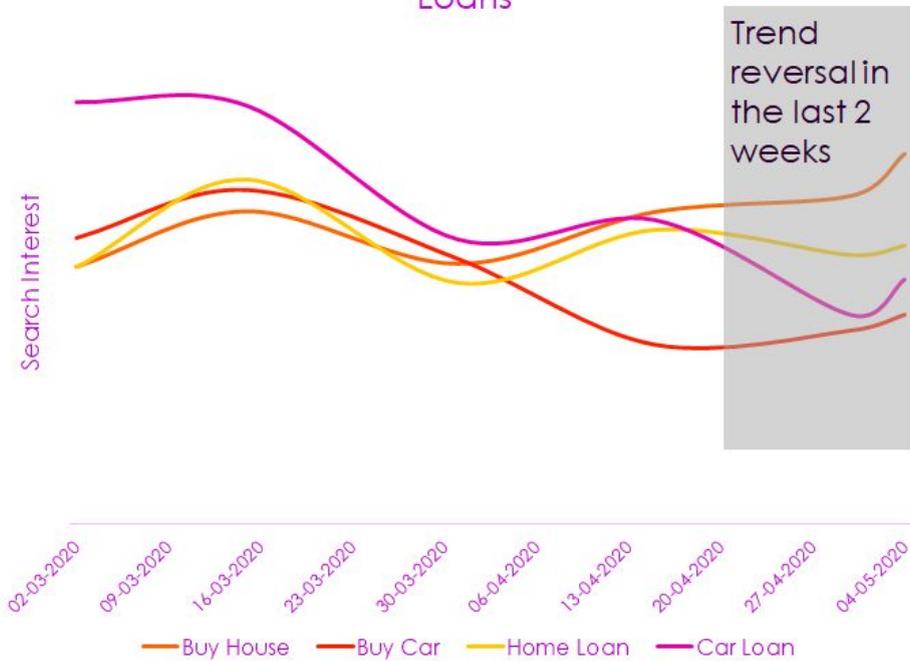
Increase in Search Interest for Health & Lifestyle Keywords



Increase in Search Interest for Finance and Travel Keywords



Increase in Search Interest for Home and Car Loans



Source: Google Trends Data, India, Weekly Average, March 2020 to May 2020

Running successful digital campaigns during the lockdown:

1. Activate the right channel at the right time

Consumers have higher affinity towards brands that provide multi-moment and multi screen engagement. Activating channels based on online behavior across day parts means brands can achieve high brand awareness during multi-screen hours and drive exploration, interest and purchase during exclusive digital hours.

2. Personalize at scale in real-time

Personalization is key to both short-term campaign performance and long-term customer loyalty. To successfully execute personalized campaigns at scale, brands need to understand consumer behavior and preferences across location, devices, channels and content in real-time. This means integrating marketing strategy with data analytics, machine learning and technology.

3. Engage with real-life moments

People are more likely to invest when the market outlook is bullish or order drinks when a sports game gets interesting. Brands can now drive call to action by syncing campaign delivery with these real-life moments.

About MIQ

MiQ is an independent marketing intelligence company with the people and technology that help businesses win. It is our vision to reimagine the value of marketing by connecting data and discovering insight to drive business outcomes.

Founded by Lee Puri and Gurman Hundal in 2010, MiQ currently employs over 550 people across 15 offices located in North America, Europe and APAC. The world's leading brands and media agencies such as American Express, Avis, Lenovo, Unilever, Microsoft, GroupM, Publicis and IPG work with MiQ. In the last year, MiQ has won various awards including Fastest Growing Tech Company of the Year at the Stevie Awards, Most Effective Use of Data at The Drum's Digital Trading Awards USA, and The Sunday Times International Track 200.

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