



Sentiments of India:
homemakers, the
backbone of our
homes

Life in a pandemic series

October 2020



EY

Building a better
working world



Background

Homemakers undertake most of the household work and support their families unconditionally. While the work may not be included in formal economic metrics as it is seldom quantified in monetary terms, homemaking is indeed a full-time job. Social developments in the recent few years have given recognition and respect to homemakers. However, the pandemic has led professionals and working class to experience the life of homemakers. Family members are now sharing responsibilities and are even more cognizant of the value homemakers add to their lives.

The pandemic has disrupted our daily schedules. Families are spending more time together in their homes. Homes have now evolved into more than a place of shelter and rest. They have become offices, gyms, restaurants and movie theatres, all rolled into one. This transformation has had an immense impact on homemakers and their place of work.

As important decision-makers in household purchases, homemakers have always had a huge influence on household expenses and consumption behavior. As the pandemic brings about changes in the environment at home, it also beckons change in the way homemakers consume and drive consumption in the family. Due to lack of external help, in many cases, families are now playing a more active part in activities traditionally under the ambit of the homemaker. Consequently, they are exerting a greater influence on homemakers' choices and lifestyle.

Spouses and children are becoming influencers for digital uptake and actively engaging in household decision-making as well. The entire dynamics of the traditional Indian home are getting challenged and the report tries to capture those nuances from the lens of the homemaker. It further discussed the implications of these for brands and businesses in the near and long-term future.

The 'Sentiments of India: homemakers, the backbone of our homes' report looks at the impact of the pandemic on:

- ▶ Evolving role of homemakers in the household
- ▶ Household and family consumption patterns
- ▶ Evolving behavioral patterns of households and long-term implications
- ▶ Adoption of digital tools and services by the homemakers and family as a unit
- ▶ Entrepreneurial ambitions of homemakers
- ▶ Sentiment towards the upcoming festive season
- ▶ Evolving consumer sentiment

EY collected responses from 385 homemakers from different age groups, family types and spend categories across various cities

Sample size and methodology

1. Planning

- ▶ A combination of qualitative and quantitative research was planned to understand in depth the homemakers' needs, challenges, motivations and triggers. These findings were then validated with a larger sample.

2. Qualitative study

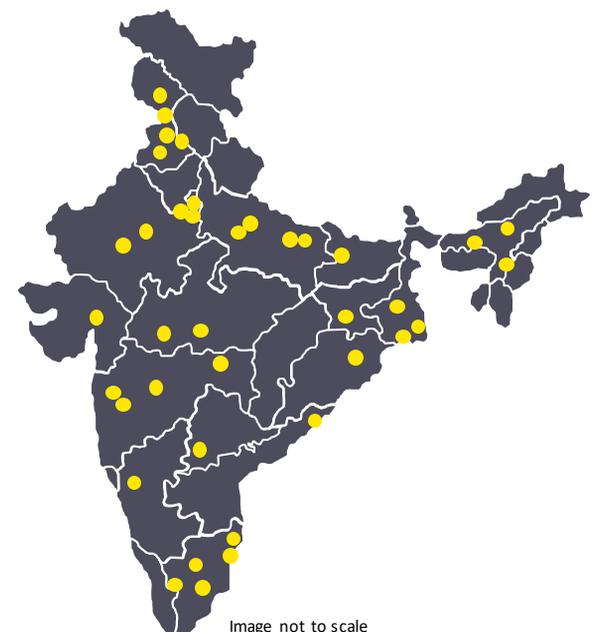
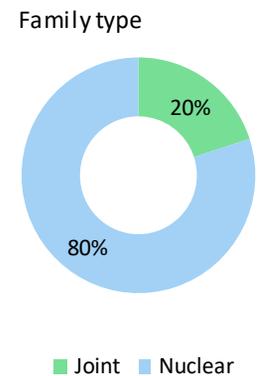
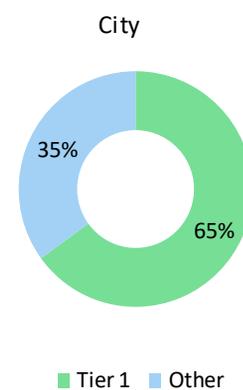
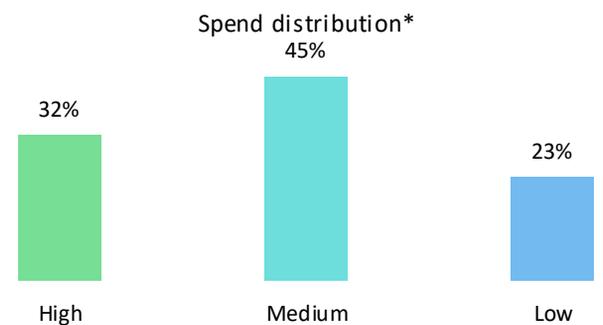
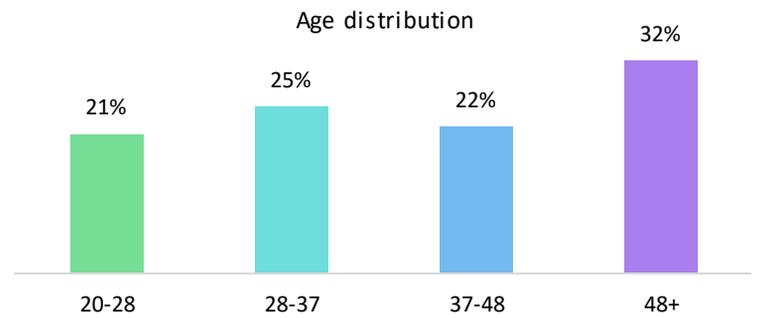
- ▶ Semi-structured questionnaires were designed for interviews
- ▶ Participants constituted of ~30 homemakers spanning a cross various demographics to get representations from different segments
- ▶ Length of the interview: 30-40 minutes

3. Quantitative survey

- ▶ A quantitative survey based on emerging themes, derived from the semi-structured interviews, was conducted after interviews to validate findings
- ▶ A questionnaire was created on Qualtrics and was floated online on various homemaker groups, resident welfare associations (RWAs), personal contacts and networks to get an adequate number of respondents
- ▶ ~385 responses were collected
- ▶ Length of questionnaire: ~25 questions

4. Analysis and reporting

- ▶ Findings from detailed interviews and survey were compiled and analyzed using power BI
- ▶ Graphs were then further analyzed, and trends and insights were evaluated to create the detailed report
- ▶ Insights were shared with key industry experts to create relevant business implications



*Spending is classified by monthly spend on groceries by household (per person)
 Classification for Tier 1 cities, per person spend (INR) of households on groceries – high spenders >7,500, medium spenders <7,500 and >2,500, low spenders <2,500
 Classification for Other cities, per person spend (INR) of households on groceries – high spenders >6,500, medium spenders <6,500 and >2,000, low spenders <2,000

EY identified nine key themes where the pandemic has impacted the behaviors and consumption patterns of homemakers

1 Health, yoga, immunity and more

Uncertainty and anxiety brought about by the pandemic has resulted in a **sharp focus on health and wellbeing**. As a result, homemakers are becoming flagbearers for family health and immunity. They are driving consumption towards the same.

60% respondents reported **feeling uncertain** due to circumstances surrounding the pandemic¹

43% respondents started **consuming herbal products**¹

39% respondents said that they **consider health and immunity boosting properties** in their purchases¹

29% respondents said they **actively practice meditation** and other activities for mental wellbeing¹

3 Challenging gender norms: paving the way for more gender neutral homes

Homemaking is becoming a shared responsibility. Family members are pitching in and actively participating in their consumption choices

63% respondents reported that **family members started contributing to household chores** since the pandemic¹

27% homemakers are **ordering online but are dependent on others** for placing orders¹

48% homemakers **delegate decision-making about brand preference** when relying on other family members to place online orders. This means other family members are also engaged in taking decisions related to brands¹

2 Effort minimization over price minimization

Homemakers are turning to products and channels that **help them save time and effort**. Convenience and do-it-yourself (DIY) techniques are driving consumption changes

52% respondents **increased usage of online services and digital payments** to save time¹

28% respondents in the high- and medium-spend category **purchased convenience goods** like standing mops, choppers, etc.¹

4 Reducing digital divide but gaps remain

Homemakers are rapidly adopting digital channels; however, digital education remains a bottleneck

52% respondents **switched to online channels for purchasing at least a category of essentials**¹

50% homemakers reported **increase in usage of online shopping post-lockdown**, while 15% used online shopping first time during lockdown¹

48% respondents stated that **UPI and digital wallets as their preferred modes of payment**¹

27% respondents, who preferred other modes of payments, stated **security is their biggest concern**¹

FinTech adoption is mostly limited to payment and transaction apps. Insurance, investments and other areas of finance are the areas that homemakers are yet to adopt on a large scale¹

5 Consumer baskets are growing, with room for experimentation

Most households have reduced frequency of purchases and increased basket size in order to reduce store visits. Additionally, there is an increasing **openness to try alternate brands**

35% respondents stated that they have **switched to alternate brands in at least one grocery category** since the pandemic¹

38% respondents said that they tried alternate brands in at least one grocery product category, but **switched back to their preferred brand** when the product became available¹

¹ EY COVID Impact Homemakers Survey, 2020

² EY COVID Impact Consumer Survey, 2020

6 Festivities to be smaller, more intimate and more digital

Households are planning intimate festivities and are expressing caution over spending

84% respondents indicated that they would **celebrate the festive season at home with only members of their own household**¹

12% of the homemakers are **waiting for festive promotions to make big ticket purchases** despite the fact

56% consumers **stating they would reduce spends on non-essentials**^{1,2}

28% respondents said they would **conduct their festive shopping online**, while **44% respondents said they would avoid shopping in large markets and crowded places**¹

24% respondents would **prefer to courier gifts to their loved ones** during the upcoming festive season¹

8 Stay home, stay safe may not be just a fad

Staying indoors may indeed become a long-term preference over going out. **Homes have become the epicenter of activities** with households staying home to stay safe

52% would prefer **cooking exotic meals at home over going to a restaurant**¹

51% would prefer **watching OTT premiers over going to movie theatre**¹

39% would prefer **home workouts over going to gym**¹

20% would prefer using **on-demand services like at home parlour rather than going to a parlor**¹

35% would prefer **online shopping over visiting physical stores**, where possible¹

7 Homemakers get demanding: the rise of over-the-top (OTT) and online platforms

Influenced by their children, homemakers are getting **accustomed to digital platforms for entertainment and learning**, in addition to taking up traditional offline hobbies like gardening and cooking

50% respondents said they **spend more time watching content on OTT platforms**¹

55% respondents stated that they are **using online channels for learning yoga, recipes etc.**¹

9 Leaning in: homemakers have more to bring to the table

Homemakers are looking for suitable support systems to unleash their entrepreneurial spirit and have increasing aspirations to work and upskill

11% homemakers are already **engaged in part-time jobs/side business or family business**¹

19% younger homemakers aged between 20-37 years are also **turning to online education platforms for upskilling opportunities**¹

15% younger homemakers already **working on business ideas to implement in the near future**¹

17% younger homemakers stated they are looking to **avail work from home opportunities**¹

55% In contrast, majority of the homemakers above 48 years, do not have any such plans¹

¹ EY COVID Impact Homemakers Survey, 2020

² EY COVID Impact Consumer Survey, 2020

Health, yoga, immunity and more

“

We have started exercising more frequently now. I have asthma, so I would earlier do pranayama once a day. However, since the lockdown, I have been doing it twice a day and that has benefitted me. I also soak almonds for the entire family at night to be consumed the next morning.

~ A Pune-based homemaker

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There is no longer any fixed timing for anything. I have to reheat food multiple times as work calls often come in between meal times. Every member has a different lunch time and I need to provide as per their schedules.

~ A Kolkata-based homemaker



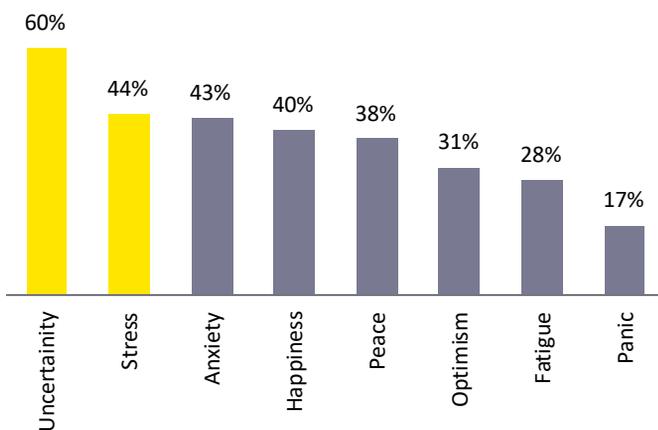
Changes in daily schedule and increased workload have led to anxiety and stress along with perdurable concerns for health and safety

Homemakers have always worked at a relentless pace throughout the day to ensure functioning of the household while still also managing to find time to stay connected with friends and family and upskill themselves.

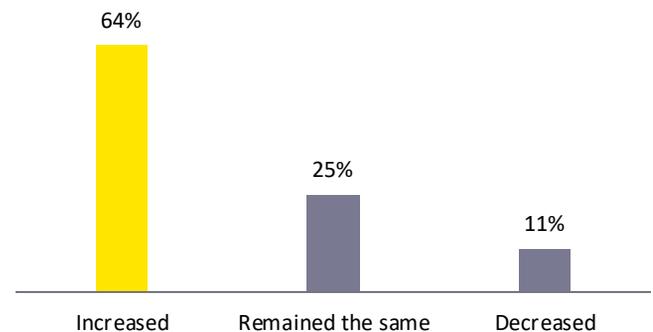
The adoption of practices to secure their families from the pandemic and the presence of the entire family at home throughout the day has resulted in increased workload for homemakers. The increased and unscheduled work has encroached on time traditionally set aside for themselves¹.

These factors cause anxiety and stress among homemakers in their bid to keep their family safe from the pandemic and have stimulated them to become flagbearers of health and wellbeing¹. It has also resulted in greater use of effort minimizers (like mops, appliances), a push towards cocooning and increased contribution of other family members in tasks¹.

Q. What are the feelings you associate with the next three months? (Select all that apply)



Q. How has your household workload changed since the lockdown?



Source: EY COVID Impact Homemakers Survey, 2020

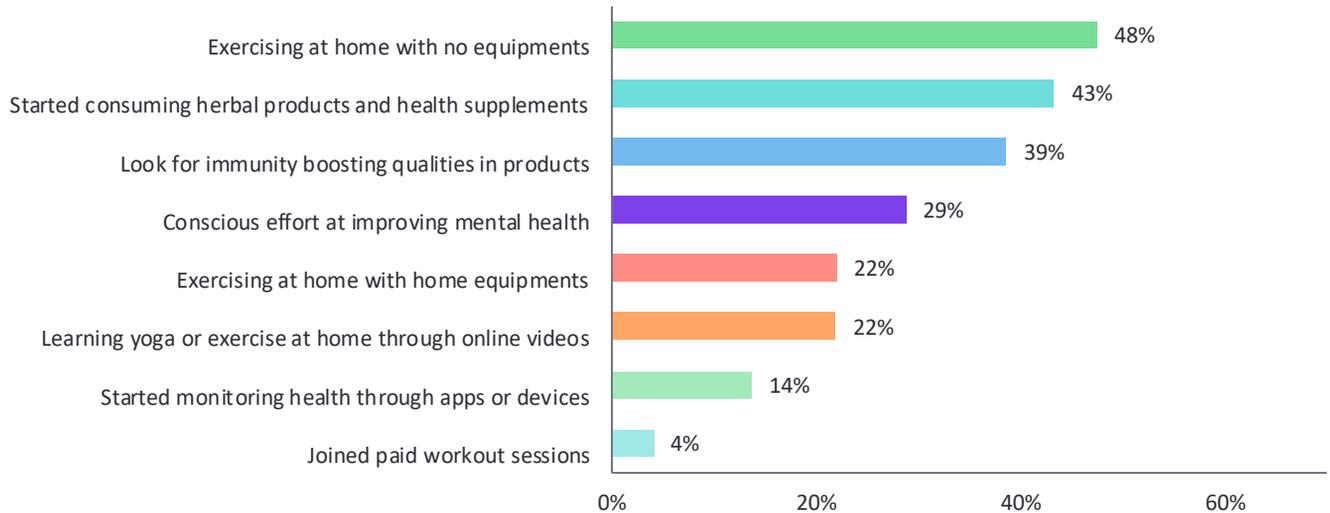
- ▶ 60% homemakers reported feelings of uncertainty, 44% felt stressed and 43% felt anxious due to the pandemic. Homemakers are concerned about their health and wellbeing and that of their loved ones¹.
- ▶ Many homemakers also reported disruptions in daily schedules on account of no fixed meal timings, elongated work calls of other family members, children at home, etc.¹.
- ▶ Stress and anxiety are also partially on account of increased workload. 64% homemakers reported an increase in workload with a similar trend across age groups, family types and cities¹.

- ▶ On a positive note, around 40% respondents felt happiness and peace while at home. 31% also felt optimistic about the future¹. These emotions can be attributed to increasing adoption of wellbeing practices like yoga, and comfort from the fact that families are living together in a safe sanctuary, i.e., their home.
- ▶ Feelings of uncertainty and anxiety are highest among the high spenders with 71% and 49% homemakers reporting the same, respectively.

¹EY COVID Impact Homemakers Survey, 2020

Homemakers are driving household consumption towards healthier alternatives and are encouraging their family members to adopt wellness activities

Q. Select all that applies to your home for each category



Source: EY COVID Impact Homemakers Survey, 2020

Further, the concern for safety and anxiety around exposure to public places also reflects in the homemakers' apprehension of using ride sharing/commercial taxi services with 45% homemakers stating their preference to continue using their personal transport over the shared services¹.

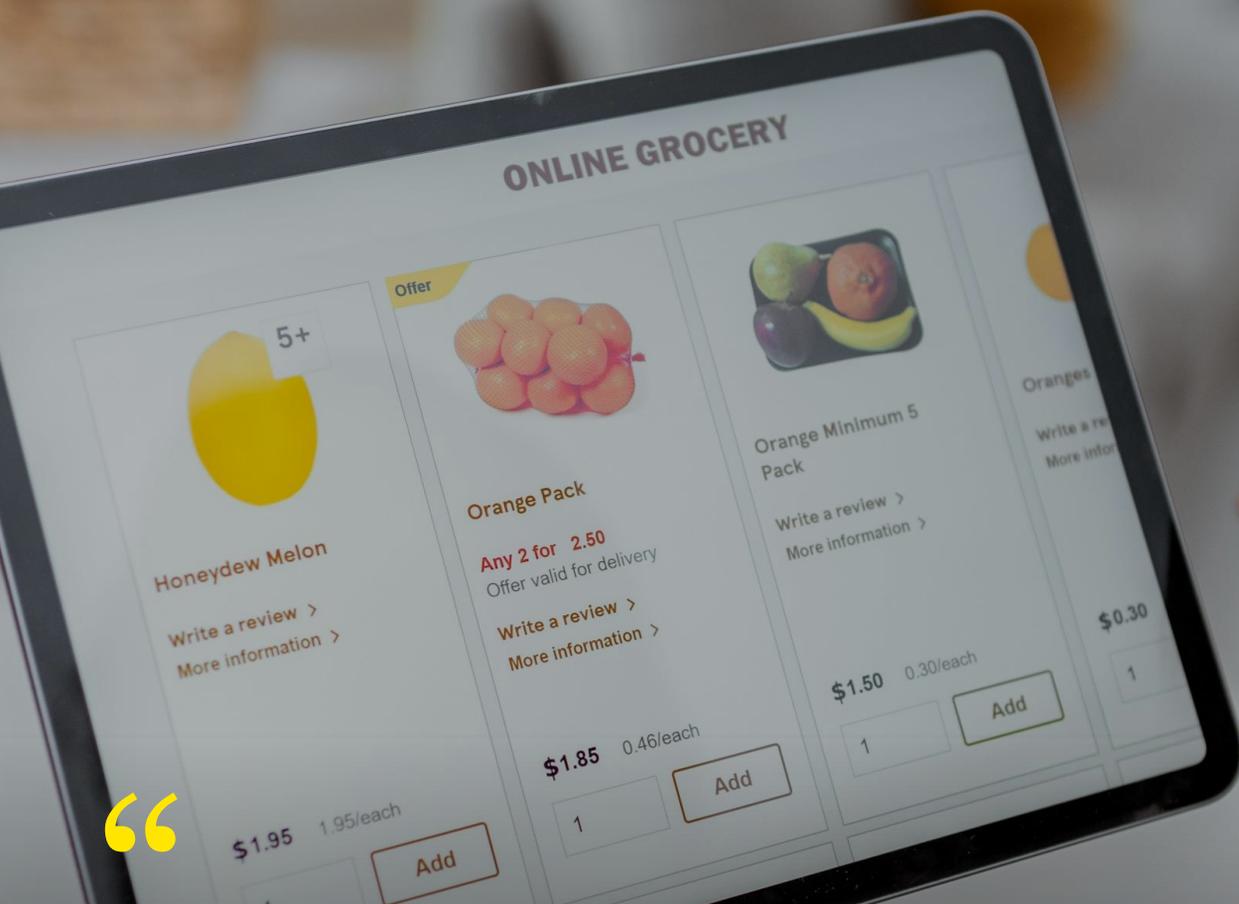
- ▶ Concern for safety and wellbeing of family loom large on the minds of the homemakers, motivating them towards adopting wellness practices.
- ▶ 48% homemakers stated that they had started practicing some physical exercises at home¹.
- ▶ 43% homemakers started consuming herbal products or health supplements¹.
- ▶ For 39% homemakers, health and immunity boosting properties were primary influencers for purchase decisions¹.
- ▶ Homemakers were also using digital means to track their health. 14% of them reported that they use apps and devices to monitor their health or fitness and 22% leverage on online video platforms to learn yoga or other forms of exercise¹.
- ▶ There was an increasing cognizance and acknowledgement of mental health issues among homemakers. Many had started meditating and making conscious efforts towards their mental health. 29% of them reported practicing meditation or making a conscious effort towards mental health improvement¹.

Key implications

- ▶ **Product or service innovation:** brands should explore category expansions into health and wellness or design new products that offer health and wellness properties.
- ▶ **Promotions and product bundles:** bundling products into immunity packs and family baskets may help brands drive sales of a larger product and service portfolio. In addition, discounts and promotions, especially on online channels can incentivize consumer purchases.
- ▶ **Communication focused on health and wellness:** consumers are looking for products and services that strengthen their immunity and protect them from the pandemic. They will also turn to brands that empathize with these sentiments and take precautions along their supply chain through safety measures and community support.

¹EY COVID Impact Homemakers Survey, 2020

Effort minimization over price minimization



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We have recently purchased an air fryer as the number of fried items getting cooked at home was increasing. We purchased an air fryer to not compromise on our health. We have also started vacuuming more often as maids are not coming.

~ A Chennai-based homemaker

Homemakers are turning to time-saving and effort-minimizing purchases to deal with increased household workload

One of the major challenges that hit homes hard was the lack of availability of the support staff and helpers that were previously employed. They served as a support system to most homemakers who would call them for laborious tasks like cleaning, dusting and washing utensils¹. Although, some households had a permanent helper employed that they were able to retain as they stayed with them, those with part-time helpers avoided calling them from the fear of exposing their homes¹. While many house helps have resumed their services in limited capacity, some households are cautiously doing household chores all by themselves¹.

- ▶ To ease the load of work, 52% homemakers sought time-saving alternatives like making purchases and bill payments online¹
- ▶ 26% homemakers purchased convenience-driven household items like vegetable choppers, standing mops¹
- ▶ 15% homemakers purchased time-saving appliances like vacuum cleaners, air fryers, steam irons¹
- ▶ Adoption of online services for their convenience is a strong trend amongst homemakers aged 20-28 years with 68% respondents stating that they started or increased the use of online services since the pandemic¹

52%

Homemakers started using online services more often for buying grocery and making bill payments to save their time

28%

Homemakers in the medium- and high-spend categories undertook convenience-driven purchases like standing mops, chopper, etc.

18%

Homemakers in the medium- and high-spend categories purchased an electrical appliance for convenience

Source: EY COVID Impact Homemakers Survey, 2020



Key implications

- ▶ **Product and service innovation:** homemakers are purchasing products that help them save time and effort. Brands could leverage this consumer need by designing products or services articulated around the theme of convenience.
- ▶ **Increasing digital presence:** as more families look to go online and increase the range of goods purchased, increasing digital presence can help brands remain in the sight of consumers.
- ▶ **Train staff to meet consumer needs:** brands can train sales staff and backend support teams to cater to a new customer segment. This comprises of homemakers and older age groups that are turning to online for faster and seamless services. Brands should ensure that staff is sensitized to the needs of the new segment, willing to learn and adaptive to their needs.

¹EY COVID Impact Homemakers Survey, 2020

Challenging gender norms:

paving the way for more gender neutral homes

“

Everyone is pitching in these days. My husband helps me in washing utensils, doing laundry and ordering items online. The children are also more pro-active. They make their own bed and try to keep the house as clean as possible. I am hoping these habits stick.

~ A Delhi-based homemaker



Family members are pitching in to lend a helping hand making homemaking a shared responsibility, challenging traditional gender stereotypes

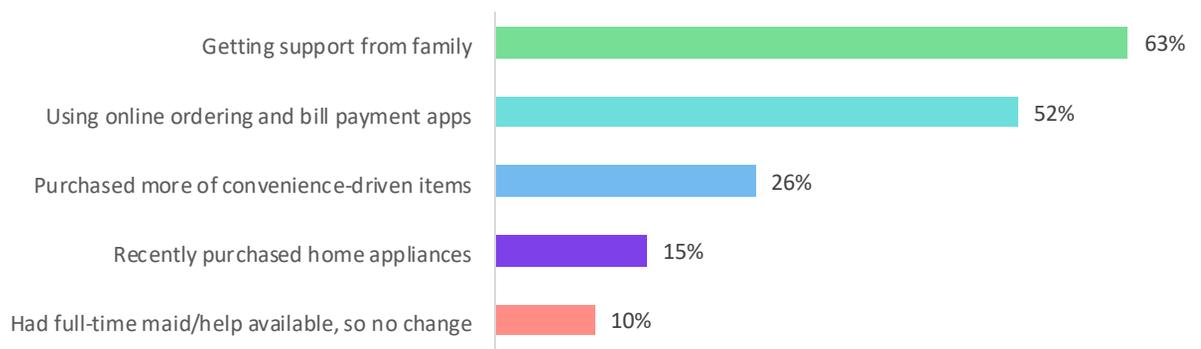
The lockdown has given family members a chance to get up close and personal, and experience the challenges of being a homemaker.

Load sharing is coming up as a trend with 63% homemakers reporting that they are receiving help from their spouses or other family members¹.

Nineteen percent of the homemakers in nuclear families across India (without children) reported that their spouse was helping them with household chores. This indicates that couples are moving towards a more equitable partnership¹.

This is a welcome social development that inches our households closer to gender neutrality and blurs the boundaries between gender-based segmentation of tasks. Even children are actively supporting their mothers, making homemaking a more shared responsibility¹.

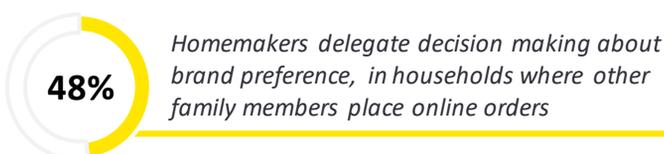
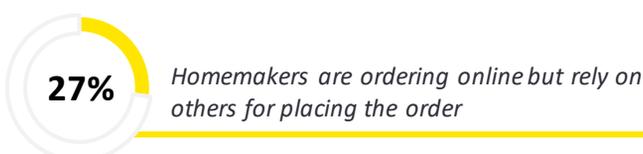
How are you managing increased household work?



Source: EY COVID Impact Homemakers Survey, 2020

Further, other family members are also having positive influences on the homemakers. Many homemakers have learnt how to use mobile apps from their children and spouses¹. Some of them had to pick it up out of necessity due to social distancing¹. This has provided homemakers with greater independence and confidence.

However, in tasks such as online bill payments or online ordering, although there has been an uptick by homemakers, many still rely on their family members to use the app¹.



Source: EY COVID Impact Homemakers Survey, 2020

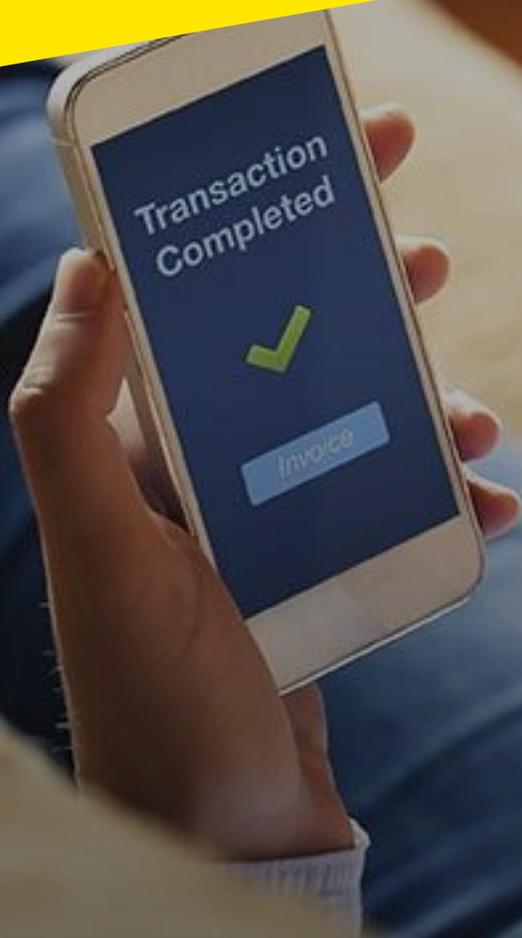
Key implications

- ▶ **Progressive branding and marketing strategies:** brands need to reinvent their image as more inclusive and progressive organizations that support sharing of housekeeping responsibility.
- ▶ **New target segments:** brands need to include men and other family members in their communications and advertisements related to household and consumption goods.
- ▶ **Spouses/children checking out on online ordering apps for the homemakers:** brands to also aim at increasing top of the mind recall (TOM) in the men's and adolescent segment.
- ▶ **Evolving societal relationships:** organizations and society at large need to support and celebrate positive social changes coming as a result of the pandemic in their policies and messaging.

The above indicates that as channels of purchasing are changing, and as homemaking is becoming more gender neutral, other family members will increasingly participate in household purchase decisions like brands and SKUs. Brands will need to include other family members in their targeting and not restrict their messaging to just the homemakers as the end purchaser is evolving.

¹EY COVID Impact Homemakers Survey, 2020

Reducing digital divide but gaps remain



“

“We do all our shopping online instead of visiting shops. I have a young baby and elderly dad whom I do not want to expose to COVID”

A Tiruchirappalli-based homemaker

“

I have asked my kids to teach me how to use ordering and payment apps multiple times but they are very busy. I am sure it won't be difficult to use because I use other apps. It should be easy once I learn and get the hang of it.

A Mumbai-based homemaker

The pandemic has accelerated the uptake of online shopping among homemakers, even in the older age categories

Encouraged by their children, there is an increasing uptake of online services amongst homemakers as they turn to ways to help them save time and enable them to operate from the safety of their homes. Homemakers are shifting to online channels, more prominently in the essentials category of purchases during the pandemic.

52%

homemakers switched to online purchasing in at least one grocery category¹

50%

homemakers reported that their usage of online shopping apps increased during the lockdown¹

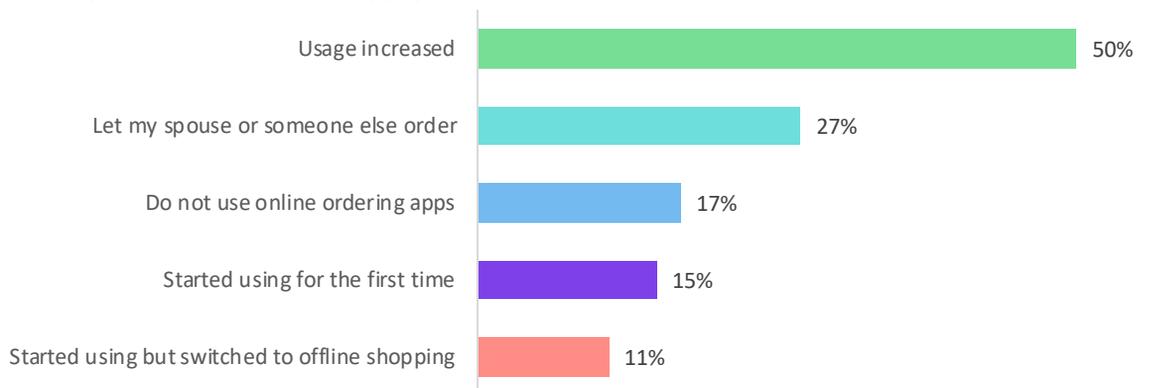
15%

homemakers reported using online shopping apps for the first time since the lockdown¹

27%

of the homemakers relied on their spouse or other family members to place orders for them via online shopping apps¹

Q. In regards to ordering online (including ordering groceries online), which of the following are applicable to you? (Select all that apply)



Source: EY COVID Impact Homemakers Survey, 2020

42% Homemakers over 48 years old depend on their spouse or someone else to place orders online

58% Homemakers in the age group of 20-37 years switched to online medium in at least one of the categories

Source: EY COVID Impact Homemakers Survey, 2020

Key implications

- ▶ **Omni-channel presence:** as household consumption shifts online, it is pivotal for brands to develop omni-channel capabilities to remain relevant for consumers.
- ▶ **Digital literacy and ease of use:** homemakers in older generations (above 48 years old) are concerned about the safety of online transactions and report difficulties in navigating apps. For wider adoption, brands should develop user-friendly interfaces specially designed for this segment. They should also leverage marketing campaigns and influencers from peer groups to educate homemakers about the safety and in-built security of online transactions.
- ▶ **Train front-end sales staff and backend support teams for online and faceless sales:** there is a need for organizations' sales and support staff to develop capabilities to support homemakers and older generation customers with technical aspects. Additionally, they should engage with this new segment and assure them of the same quality standards as provided by the offline channels.



¹EY COVID Impact Homemakers Survey, 2020

Difficulties while using online applications and concerns regarding product quality remain barriers for wider adoption

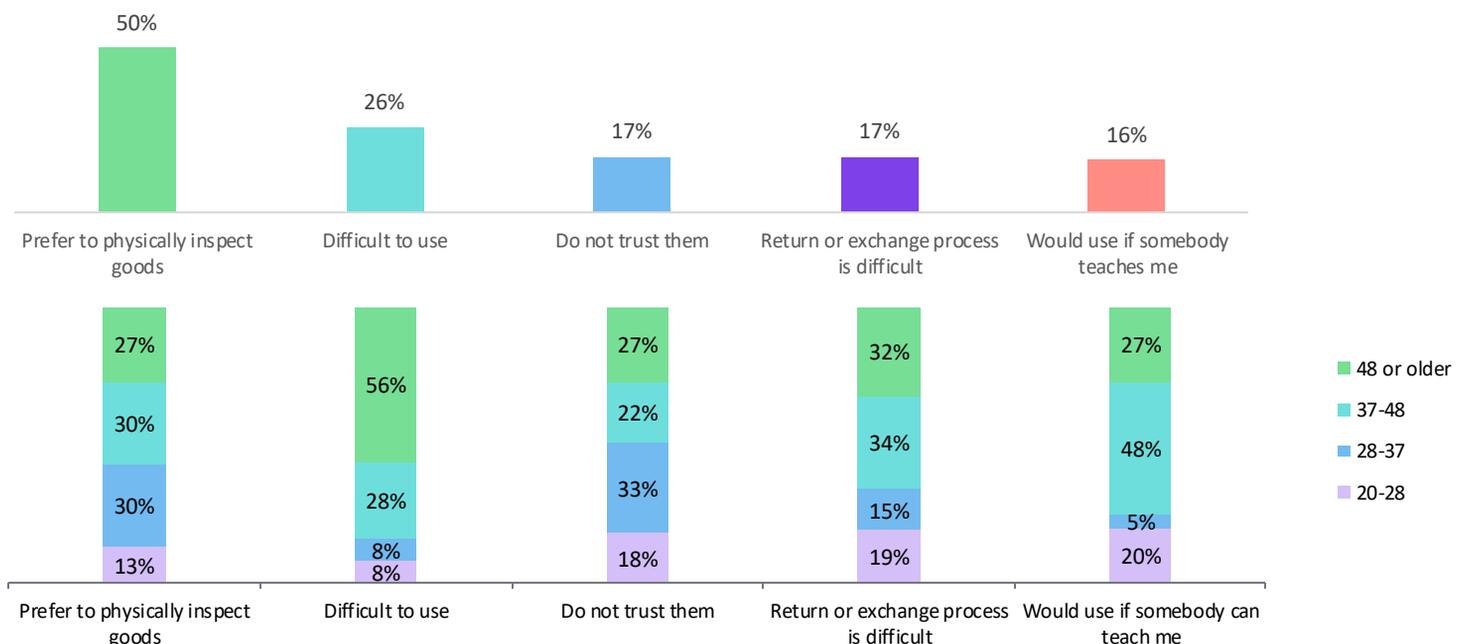
Digital literacy still remains a bottleneck for wider adoption of digital channels, especially in the older segments as homemakers report the need for support from their family members to use online channels. Seventeen percent of the homemakers who were surveyed stated they were not using online ordering apps. The reasons for that included the following:¹

- 50%** homemakers preferred the touch and feel aspect of shopping¹
- 26%** homemakers found it difficult to navigate online ordering apps. A larger proportion of respondents in the older age groups had this issue with 42% homemakers in the 48 or older age group reporting the same¹
- 17%** of respondents said that they do not trust online ordering apps for placing orders because they are afraid of product quality¹
- 17%** raised concerns over return or exchange of products as the main reasons from not making online purchases¹
- 16%** homemakers conveyed willingness to learn using such apps if someone were to teach them¹

Key implications

- ▶ **Marketing communication:** apps and platforms can focus on addressing the concerns of consumers about online apps by messages, emphasizing aspects such as their ease of use and safety measures to drive adoption.
- ▶ **Peer-to-peer learning:** organizations can establish peer-to-peer learning communities by leveraging kitty groups/RWAs and engaging older children as influencers to help homemakers onboard onto online platforms as part of onboarding campaigns.
- ▶ **Gamification:** continuous engagement by reducing lapses through gamification using badges, points, rewards, recognition schemes may foster healthy competition among homemakers and increase their digital uptake.
- ▶ **Creating simpler alternate interfaces:** creating a different version of interfaces which are less complex and have basic functionality will increase the ease of use for the less tech-savvy homemakers and consumers from older segments.

Reasons for not using online ordering apps



Source: EY COVID Impact Homemakers Survey, 2020

¹EY COVID Impact Homemakers Survey, 2020

UPI and wallets have emerged as the most popular payment methods among homemakers; however, penetration of other FinTech applications is limited

The pandemic has accelerated the adoption of digital payments with consumers concerned about exposure to the virus through cash transactions. Children have played a pivotal role in introducing homemakers to digital wallets¹

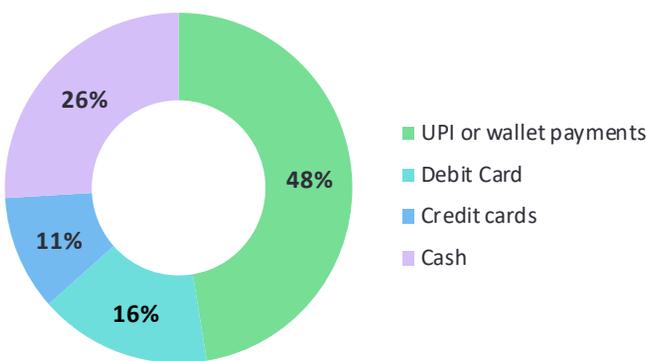
48%

homemakers said UPI or digital wallets was their preferred payment method¹

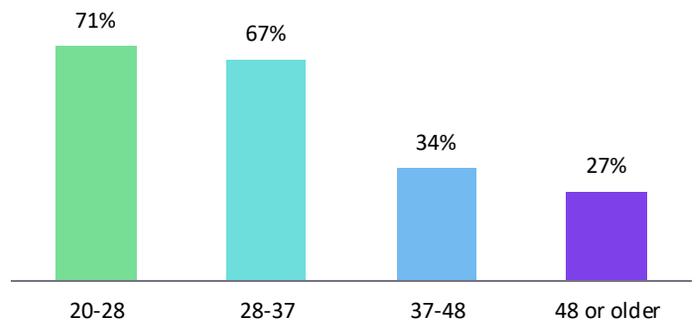
71%

Preference for digital payments is strongest among younger homemakers aged 20-37¹

Q. Which of the following payment methods are preferred by you for day-to-day transactions?



Percentage of homemakers who preferred UPI across each age group



Source: EY COVID Impact Homemakers Survey, 2020

“ I do not know much about that (investments and insurance). My husband looks after those matters. I will need to learn about these things before I can contribute.

A Bengaluru-based homemaker

Currently the uptick in fintech is limited to digital payments. However, potential for penetration of digital tools in other areas like insurance, wealth management, budget management remains to be seen.

- ▶ Managing fixed deposits (FDs) and investments was cited as the prerogative of spouse with minimal involvement from the homemaker¹.
- ▶ Lack of awareness and confidence in handling investment and insurance matters was cited as primary deterrents to adoption of digital tools in this space¹.



¹EY COVID Impact Homemakers Survey, 2020

While a third of the homemakers are concerned about safety of digital transactions via UPI/wallets, many still express willingness to learn and adopt

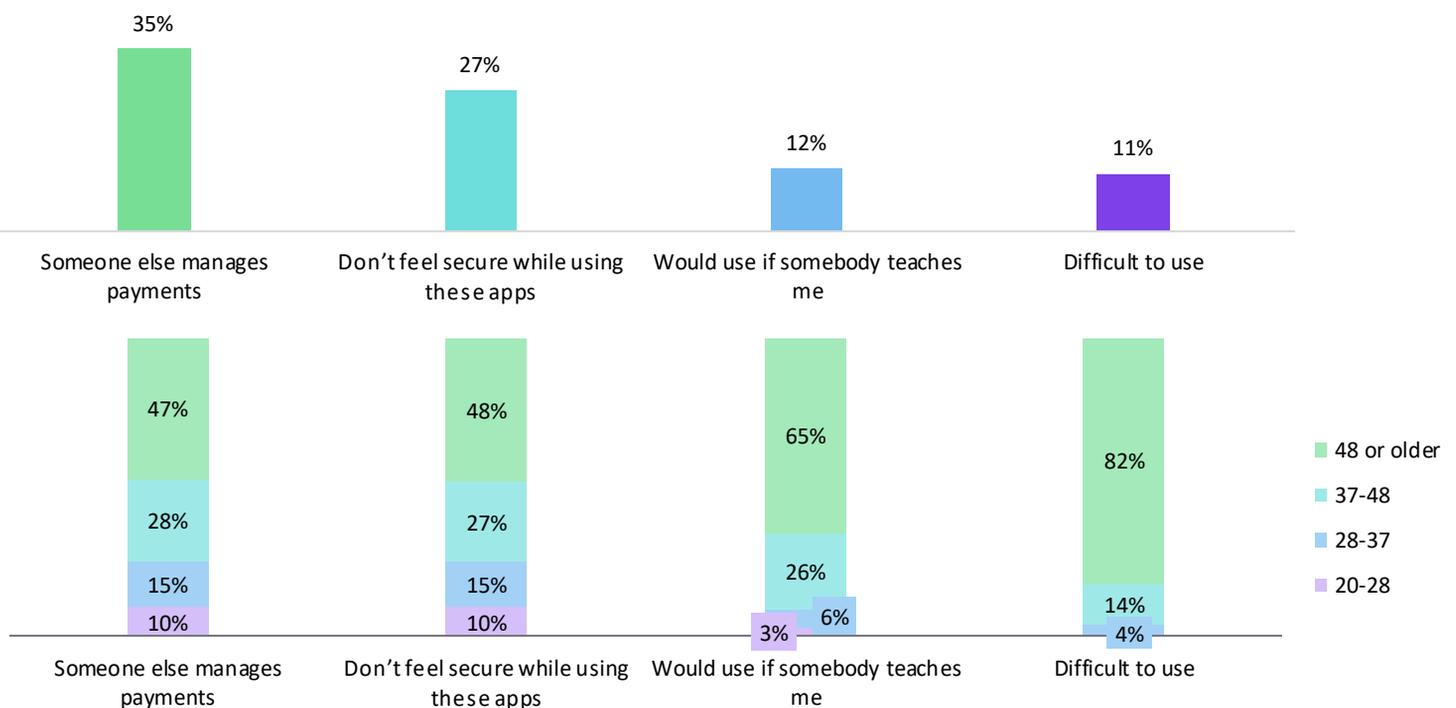
Concerns about security of such transactions and financial loss due to user error (unintended transactions) remain a hinderance to higher levels of adoption. Fifty-two percent of the homemakers showed preference for cash or card-based payments over UPI or payment wallets for the following reasons¹:

- 35%** homemakers reported that some other family member(s) looked after bill payments¹
- 27%** reported that they did not feel secure while using these apps¹
- 12%** said were willing to use UPI/wallets if someone taught them how to use them¹
- 11%** homemakers have tried payment apps but found them difficult to use. This is more prominent among respondents in the age group of 48 years or older with 18% of them having raised the same concern¹

Key implications

- ▶ **Partnerships with edtech platforms can help drive financial literacy:** organizations and edtech platforms should curate programs that can enable homemakers to upskill their financial capabilities. Fintech platforms could partner with edtech companies to embed learning and utility in a common interface.
- ▶ **Leveraging peer influencers:** sharing success stories of how homemakers are using fintech could motivate more homemakers towards its adoption.
- ▶ **Undertaking empathetic branding:** messaging focused on safety and ease of use of apps will resonate with homemakers and address their concerns about digital platforms.
- ▶ **Offering homemaker-centric schemes and incentives:** personalization of schemes and incentives targeting homemakers (reward points, discounts, etc.) could encourage the segment to adopt fintech

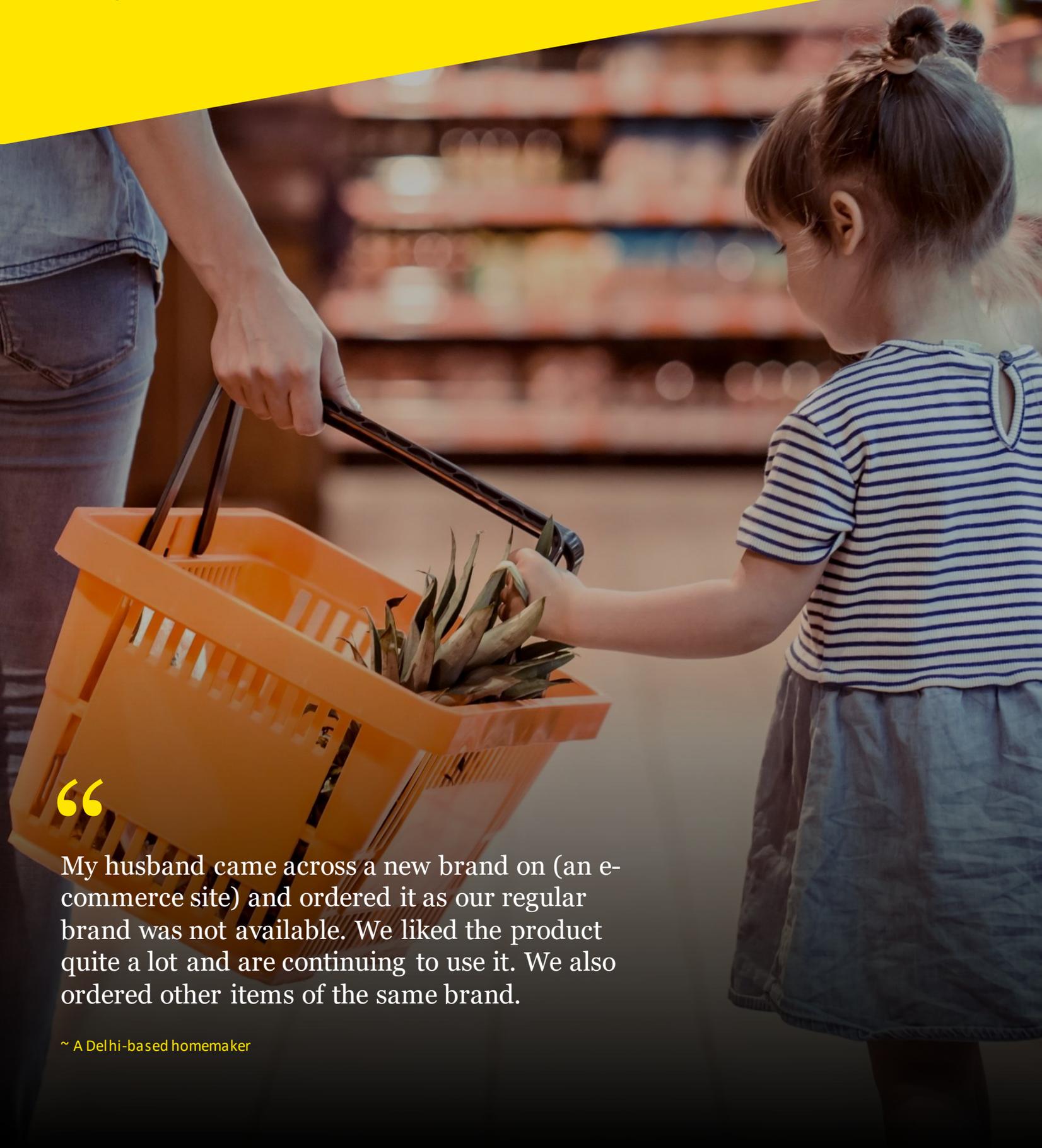
Reasons for not using UPI/payment wallets



Source: EY COVID Impact Homemakers Survey, 2020

¹EY COVID Impact Homemakers Survey, 2020

Consumer baskets are growing, with room for experimentation



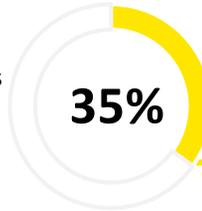
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My husband came across a new brand on (an e-commerce site) and ordered it as our regular brand was not available. We liked the product quite a lot and are continuing to use it. We also ordered other items of the same brand.

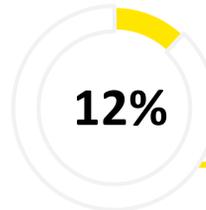
~ A Delhi-based homemaker

Homemakers are changing not just how they purchase but also what they purchase, with an increasing willingness to experiment with different brands

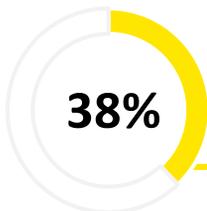
Homemakers tend to have a preference for a particular brand, especially when it comes to essentials and personal care products. One seldom finds a homemaker experimenting frequently with new brands and products. However, with the enforced lockdowns, ensuing supply chain disruptions and movement restrictions, homemakers had no choice but to move away from their preferred brands and purchase those brands that were available with the retailer¹. This gave an impromptu and unplanned exposure to brands outside of the homemakers' typical preferences. As a result, in some cases homemakers found merit in shifting to entirely new brands, even though in some cases they also did switch back to their original preferences.



homemakers switched to some other brands or non-branded alternatives in at least one category



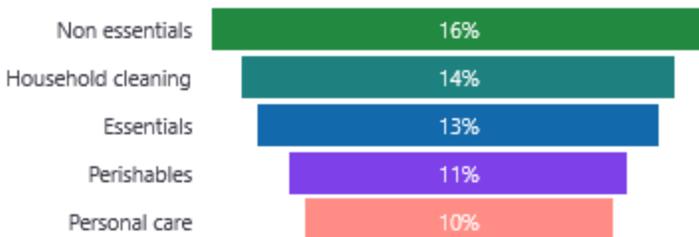
homemakers switched to non-branded alternatives in at least one of the categories



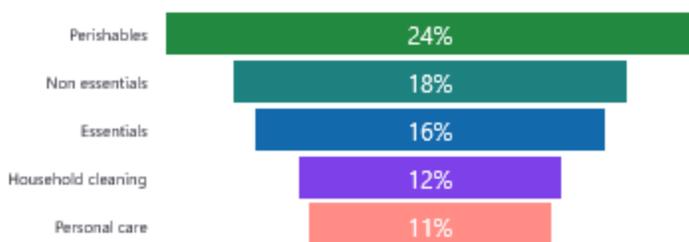
homemakers had tried a new brand but switched back to their regular brands in at least one category



I have switched to alternate brands or non-branded products in the following category/categories:



I tried an alternate brand but switched back to my preferred brand in the following category/categories:



Source: EY COVID Impact Homemakers Survey, 2020

Key implications

- ▶ Brand loyalty is on the test with homemakers open to trying and opting for new brands. Brands will need to build strong differentiators to hold the increasingly flexible customer base.
- ▶ There lies a potential for white label brands as consumers are now more open to trying out new brands. Brands can impact their top line positively by increasing their product assortments and optimizing customer offerings through product bundling and promotions.

¹EY COVID Impact Homemakers Survey, 2020

Festivities to be smaller,
more intimate and more
digital



“

We will celebrate Diwali at home only this year. I do not want to risk the health of my children and parents who are living with me.

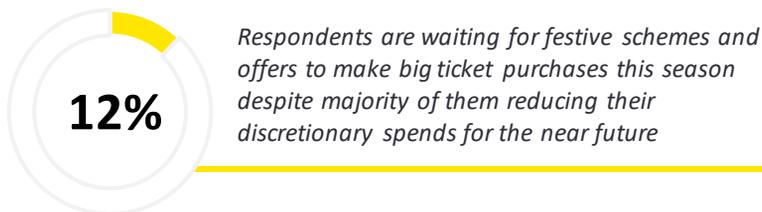
A Faridabad-based homemaker

Festive celebrations will be intimate and digital with new shopping and gifting behaviors on account of the pandemic

While the pandemic has eaten up a large part of the year, the remaining months are typically festive months. The onset of the festive season brings hustle and bustle in markets. Some households even hold off their major purchases till auspicious times, around festivals, making full use of available discounts and offers.

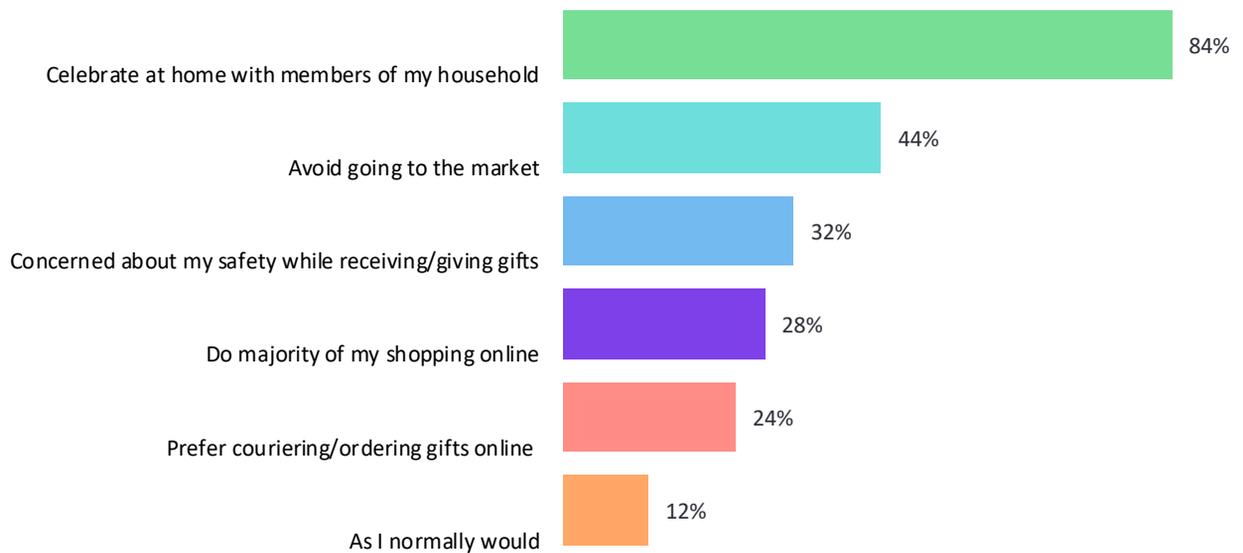
However, with the pandemic in the backdrop, we found a large number of respondents to be more cautious this year, both with respect to celebrations and while spending.

- ▶ With exposure to the pandemic being a primary concern, 84% respondents said that they plan to celebrate festivals with members of their household only¹.
- ▶ Additionally, 44% respondents said they would avoid shopping in large markets and crowded spaces. Half of the respondents across different age groups, cities and spend categories do not plan to make any big ticket purchases this festive season¹.
- ▶ 24% respondents would prefer to courier gifts to their loved ones during the upcoming festive season. However, 32% respondents expressed concern about their safety while receiving gifts as well¹.
- ▶ Caution and anxiety were highest amongst the high spenders with 52% respondents from the category reporting that they would avoid going to the market for festive shopping. Additionally, 41% highlighted that they would conduct most of their festive shopping online compared to 28% across all categories¹.



Source: EY COVID Impact Homemakers Survey, 2020

Q. Given the current situation, how do you plan to celebrate upcoming festivals in the near future? (Eid/Diwali/Navaratri/puja, Christmas, etc.) (Select all that apply)



Source: EY COVID Impact Homemakers Survey, 2020

¹EY COVID Impact Homemakers Survey, 2020

Q. With regards to festive schemes and offers, which of the following apply to you? (Select all that apply)



Key implications

- ▶ Players having only physical presence need to build **omni-channel presence and infrastructure in terms of their product portfolio and delivery systems**. Retailers can explore newer models of exchange such as curbside pickups, click and collect, prescheduled visits, etc. to address safety concerns of shoppers this season. Introducing hampers and baskets for easy gifting along with tie-ups with e-commerce companies for delivery to enable couriering of gifts will help in leveraging consumer sentiment towards the upcoming festive season.
- ▶ **Brands should focus on empathetic messaging** with emphasis on safety and intimacy of family relationships this season. For example, high-spend customers are most likely to stay indoors and shop for higher ticket items online. Retailers for durables, furniture or luxury goods may see lesser demand from offline channels. As a result, targeted marketing and servicing towards high spenders need to be focused on safety.

Source: EY COVID Impact Homemakers Survey, 2020



¹EY COVID Impact Homemakers Survey, 2020

Homemakers get demanding: the rise of OTT and online platforms



“

I came across some art classes on Instagram like Mandal art and Madhubani paintings that I have enrolled for. They conduct live sessions over video conferencing and social media that I regularly attend.

A Gurgaon-based homemaker

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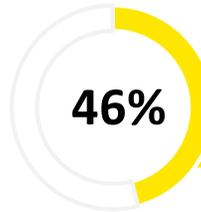
I like to play Bridge and Sudoku on my phone. It helps to keep the mind engaged and running.

A Chandigarh-based homemaker

Influenced by the younger generation, homemakers are turning to OTT platforms and video content for hobbies, upskilling and leisure activities

The uptake in digital is not just limited to necessary tasks like grocery ordering or bill payments but also extends to leisurely pursuits of the homemakers. Homemakers are preferring digital platforms to spend their sparetime.

- ▶ 55% homemakers responded that they were spending their leisure time on online video platforms to learn new skills and 50% were watching OTT¹.
- ▶ Homemakers have become active users of online and mobile gaming with 31% respondents spending time on online games and brain teaser apps¹.
- ▶ The reliance on digital media to help spend time reflects in increased spends on OTT subscription and internet connections. Forty-four percent homemakers reported an increase or upgrade of OTT subscriptions post the lockdown and 36% homemakers upgraded or repaired their internet connection at home or mobile¹.
- ▶ However, there are still large takers for offline leisure activities like gardening, cooking, embroidery, etc. as stated by 46% homemakers¹.



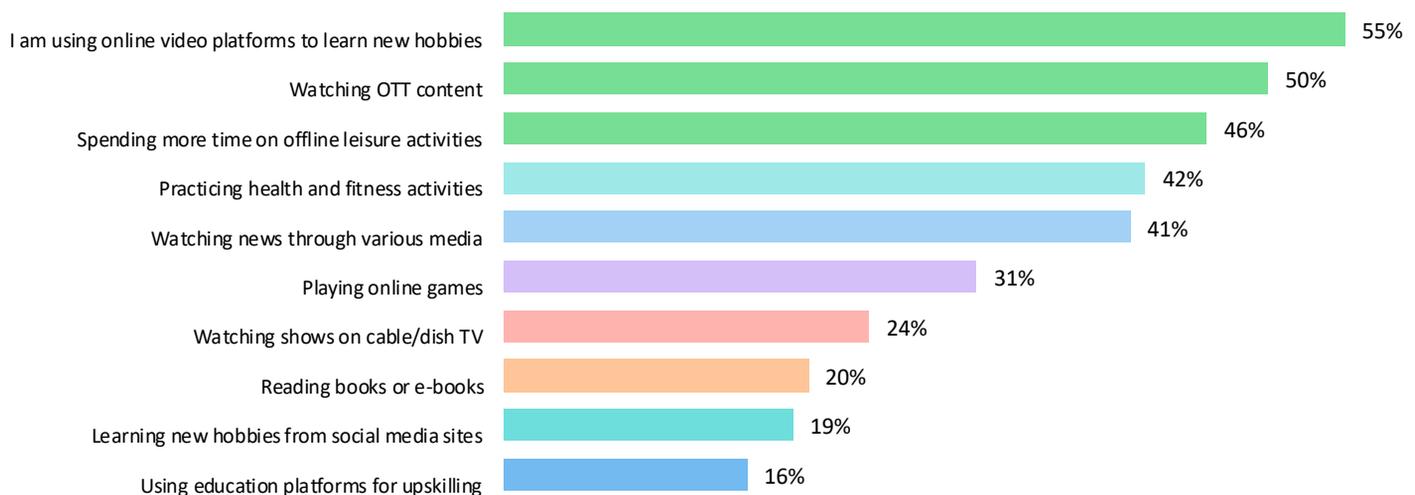
Homemakers aged 20-28 are spending time on online games or brain teasers like Ludo and Sudoku

Source: EY COVID Impact Homemakers Survey, 2020

Key implications

- ▶ **Learning-based content curation:** on-demand learning is an increasing area of interest for homemakers, both personal and professional. Edtech and e-learning platforms can leverage on the trend and curate classes for homemakers' areas of interest. OTTs can include content on leisure learning like cooking, health and fitness.
- ▶ **Shift to hand-held devices:** with increasing comfort on personal devices, OTTs can look to target homemakers for their next phase of growth in the handheld device segment. Currently, homemakers are relying on common room televisions for viewing OTT channels¹. The next natural progression can possibly be to smartphones and tablets which are extensively used for social networking and on-demand video content.

Q. Which of the following activities have you started/increased time spent on, since the lockdown? (Select all that apply)



Source: EY COVID Impact Homemakers Survey, 2020

¹EY COVID Impact Homemakers Survey, 2020

Stay home, stay safe may not be just a fad



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We look forward to watching movie premiers on OTT platforms as it has become an enjoyable source of family entertainment. My kids love munching on popcorn and my salsa.

A Kolkata-based homemaker

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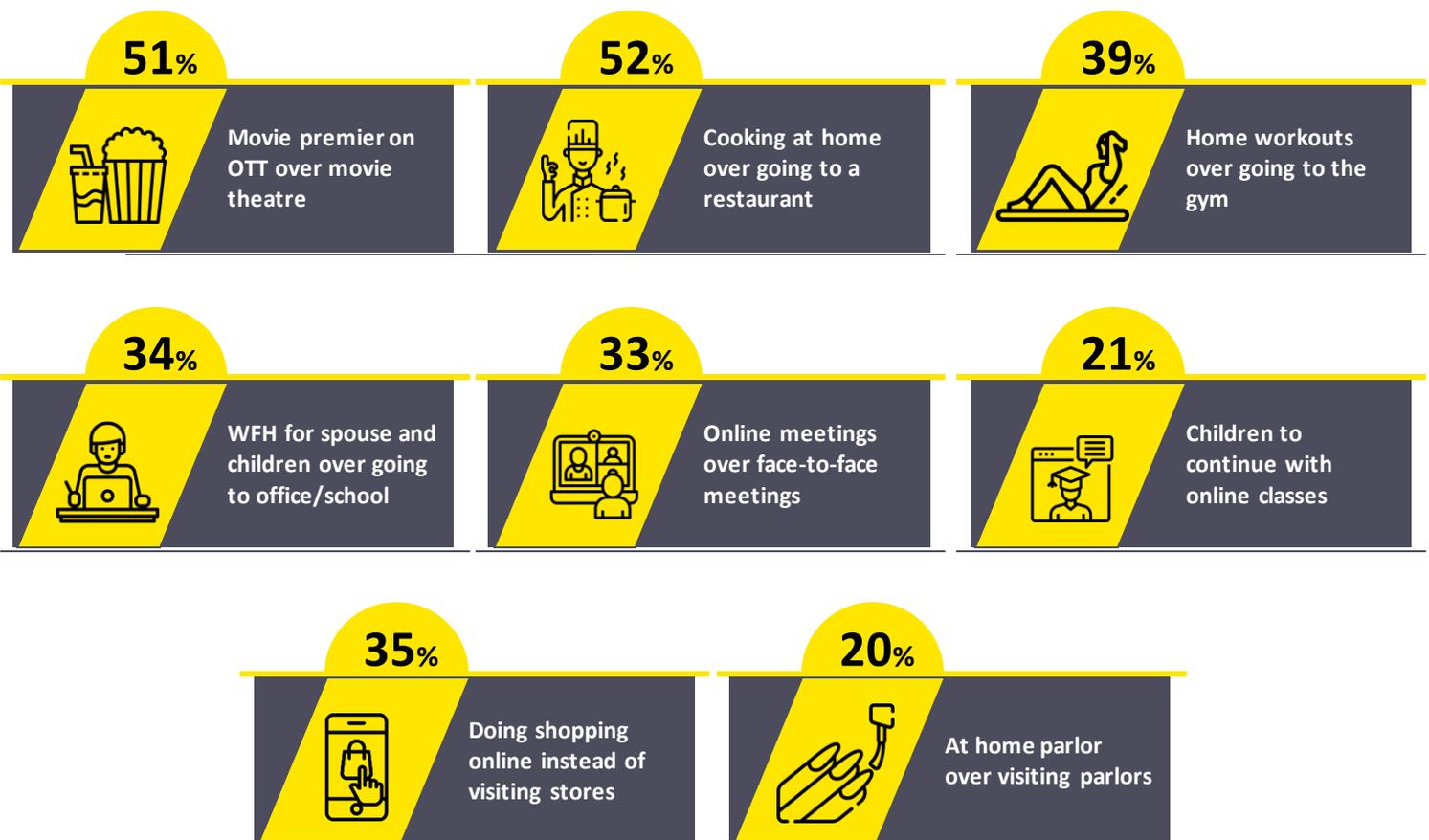
I was not able to visit the parlor and was also hesitant to call someone home. As a result, I tried coloring and straightening my hair at home. Surprisingly, the results were not too bad and this is something I can possibly continue to do at home even in the future. Saves me a whole lot of effort and time of going to the parlor!

A Delhi-based homemaker

Homes have become the epicenter of activities with family members staying home to stay safe

Since the advent of the pandemic in March, consumers have been confined to their homes for the large part. While currently, the restrictions may not be as strict as they were during the lockdown, households are preferring to stay indoors. Further, homemakers have found merits in engaging in certain activities at home rather than stepping out. For instance, homemakers shared instances of coloring or straightening their hair at home, undertaking waxing and threading themselves and using kitchen beauty recipes. Such developments are likely to have long-term behavioral impact and the implications will be far reaching, not just for homemakers as individuals, but also families as a unit of consumption for services like movies, eating out and travelling.

Q. Which of the following activities would you want to continue doing even after the pandemic is under control and public places open?



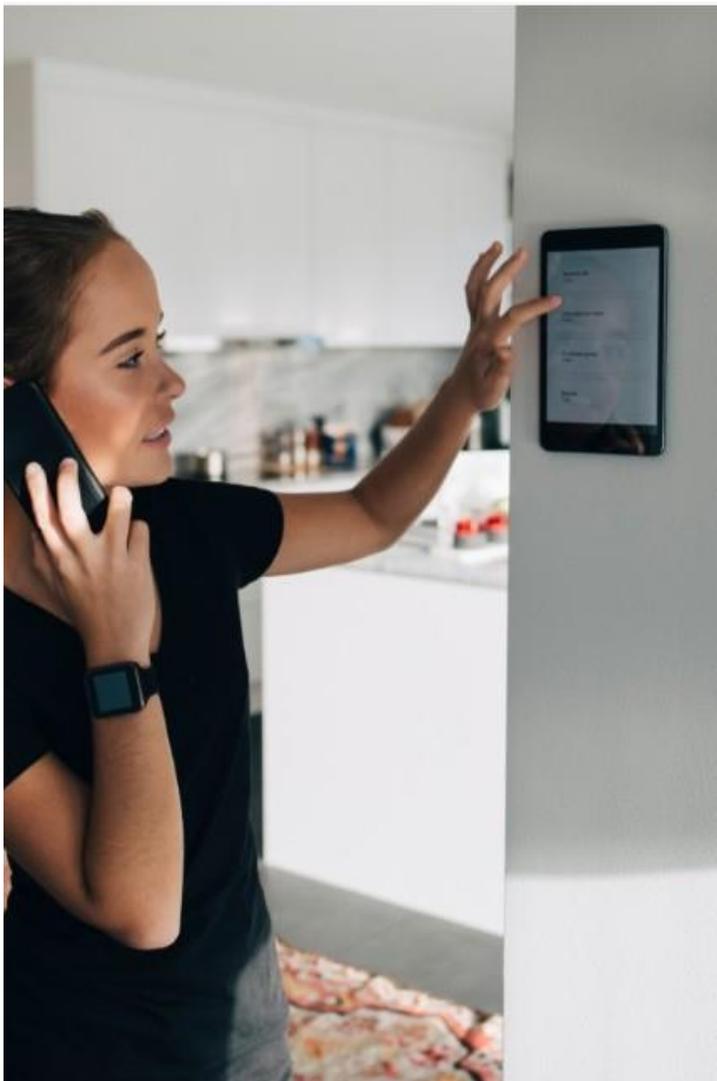
Source: EY COVID Impact Homemakers Survey, 2020

¹EY COVID Impact Homemakers Survey, 2020

Additionally, homemakers are not expecting resumption of normal life in the short-term. Families are expecting work from home to be a long-term practice. They are therefore, investing in making their work set ups at home more comfortable.

- ▶ 24% homemakers responded that they made purchases recently to make work from home more comfortable by purchasing laptop-table, desk, chair, etc.¹.
- ▶ 36% households upgraded or repaired their internet connection, post the lockdown.

This trend of what can be done at home, shall be done at home is also seen in the near-term where 84% respondents indicated that they would spend the festive season at home and only celebrate it with members of their own household.



Key implications

- ▶ **Product/service innovations:** with most households limiting their outdoors exposure, industries involving mass gatherings like theatres, halls and hospitality are heavily impacted. They need to undertake product or service innovations to tackle the loss of footfalls and consumers' inclination towards staying indoors. For e.g., entertainment industry may think about bouncing back sales by providing service delivery through segregated seating, cabins, etc.
- ▶ **Smart homes and devices:** adoption of connected devices for smart homes and use of voice search and voice commands devices are likely to increase in high-spend households
- ▶ **At-home services:** at home grooming and fitness to pick up with consumer preferring to get things done at home. Use of appliances that save time and effort and promote DIYs such as trimmers, epilators, etc. are likely to increase in the near future. Gym and sports industries can look at equipment rent sharing, online packages and at-home training as some of the alternate revenue streams.
- ▶ **Ergonomic investments:** with work from home seeming as a long-term possibility, investment in ergonomic furniture and better connectivity at home are going up.
- ▶ **Mental health implications:** families have been homebound and cocooned for close to six months. While for some, the transition to normalcy might be not eventful, many people might need counselling and mental health support while resuming to the older, normal ways of living. Policies around workplaces and other public places need to keep individual needs in mind while resuming operations and taking into account mental barriers and potential phobias.
- ▶ **Proclivity for online meetings:** traditionally, offline activities like parent-teacher meetings, doctor consultations, complaints and redressals, registry are increasingly moving online. Organizations will need to take into account user preferences. They should have adequate facilities and support in place to provide uninterrupted services.

¹EY COVID Impact Homemakers Survey, 2020

Leaning in: homemakers have more to bring to the table



“

I am using social media platforms to sell face masks that I paint at home. They have helped me quite a bit and I am managing to sell around three to four masks everyday. I recently learnt to use video conferencing as well to be able to attend the meetings of the art society that I am a part of.

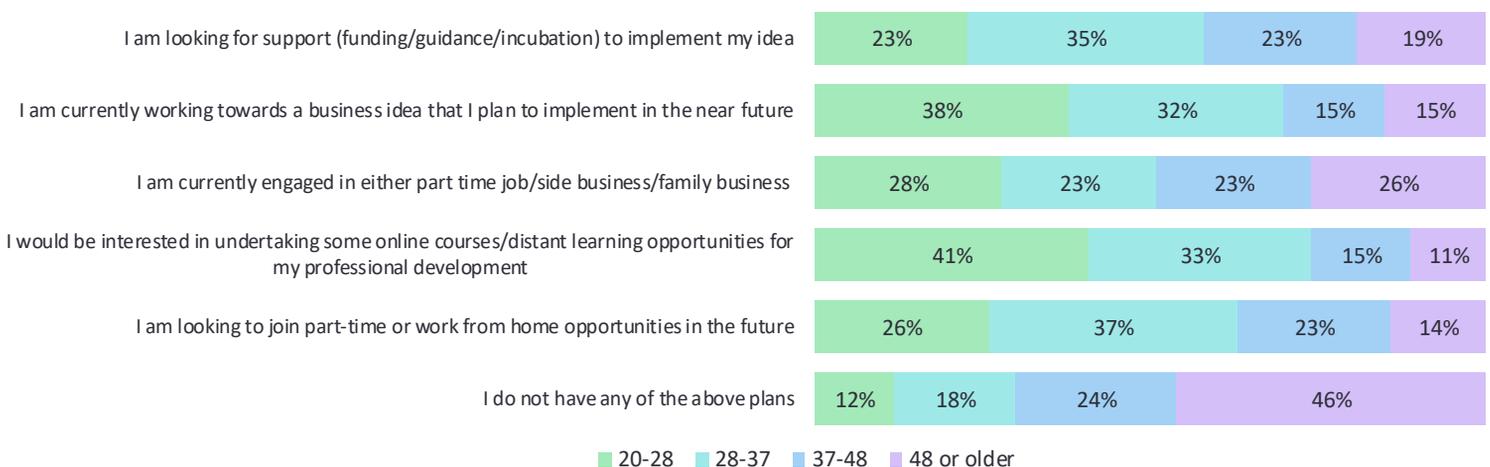
A Delhi-based homemaker

Homemakers are looking for suitable support systems and upskilling opportunities to unleash their entrepreneurial spirit

One of the major findings from the interactions with homemakers was that a lot of the homemakers, especially in the younger age groups, have aspirations to start something of their own, monetize their hobbies or join the workforce¹. A small proportion is already engaged in side/family business or part-time jobs¹. Since work from home has got increasing mainstream acceptance, it opens up newer avenues for homemakers who are keen to work but were limited due to availability of less time and family responsibilities. With the increasing support for local businesses and small and medium enterprises small home start-ups of homemakers also have a new support system in place.

- ▶ 11% homemakers are already engaged in part-time jobs/side business or family business¹.
- ▶ Young homemakers have an entrepreneurial spirit with 15% respondents between 20-37 age group already working on business ideas to implement in the near future¹.
- ▶ With WFH becoming more mainstream, 17% respondents from younger age groups stated that they are looking to take up such opportunities¹.
- ▶ 19% younger homemakers are also turning to online education platforms for upskilling opportunities¹.
- ▶ In contrast, majority (55%) of the homemakers from older age groups (48 or older) do not have any such plans¹.

Q. With work from home and flexible work becoming more acceptable, which of the following apply to you? (Select all that apply)



Key implications

Source: EY COVID Impact Homemakers Survey, 2020

Employers

- ▶ Homemakers prioritize flexibility. With WFH getting increasing acceptance, homemakers are opening up to formal employment opportunities.
- ▶ Homemakers who had to leave the workforce, on account of home commitments, are now looking to join back, opening up a larger experienced talent pool for the employers.
- ▶ Need to redesign policies along work life balance to enable homemaker to balance both responsibilities and also allow for other working members in the family to contribute at home.

Policy makers/venture capitalists

- ▶ Encourage small home start-ups through policies, funding and mentorship.
- ▶ Provide dedicated platforms to homemakers to showcase their ideas and business models.

Start-ups/digital platforms

- ▶ Young homemakers are actively looking to upskill through distance learning opportunities. This opens a newer target segment for edtech startups.
- ▶ E-commerce platforms can partner with homemakers to sell products and aid deliveries.

¹EY COVID Impact Homemakers Survey, 2020

How can businesses leverage these emerging trends?

Branding and communication

- ▶ **Progressive marketing:** marketing narratives for household products should also include both genders and multiple generations to reflect the evolving dynamics at home.
- ▶ **Evolving target segments:** with the advent of online shopping, household purchases are no longer exclusive responsibility of the homemakers. Spouses and other family members are also getting involved in the purchase processes. Online channels should expand their online communication to capture this wider audience.
- ▶ **Empathetic branding:** organizations can connect with consumers through empathetic messaging. They can share information regarding product safety, health and wellness benefits and can also promote efforts towards combatting the pandemic – directly and indirectly.

Engagement channels

- ▶ **Backend teams becoming the face of the brand:** With increased adoption of online ordering and digital services, technical support, backend support and delivery teams have become the face of organizations.
- ▶ **Upskilling for newer customer segments:** Organizations must recognize this shift and invest in customer engagement strategy. They should upskill their **frontline staff and train them appropriately to manage newer segments like older population and homemakers that are getting onboarded.**

Product/service innovation and R&D

- ▶ **Comfort, convenience and health value adds:** The pandemic has **changed consumer priorities.** Consumers are now assessing purchases through the lens of comfort, convenience and health
- ▶ **Product and service innovations:** Organizations must look for innovation, new product or service development in **adjacent business streams and invest in research and development (R&D) to leverage this emerging trend.**

Penetration of fintech and digital apps

- ▶ **Security a big concern for homemakers:** There has been an increase in the adoption of digital wallets and payment apps since the pandemic. However, **security and process complexity** remain bottlenecks for their wider adoption among homemakers.
- ▶ **Emphasis on safety and ease of use:** Organizations should **emphasize on safety of digital payments** from malpractices, and **negate out process redundancies to elevate user experience.**
- ▶ **Leveraging customer experience journeys:** Organizations can leverage **customer experience stories** and users' journey to increase adoption in digital payments and financial management tools among the untapped homemaker segment.

Online education and upskilling

- ▶ **Personal and professional upskilling:** Homemakers are looking for **upskilling opportunities,** for both personal and professional growth.
- ▶ **Curated EdTech programs for homemakers:** Organizations and EdTech platforms should curate programs that enable homemakers to **upskill their financial capabilities.** Organizations should roll out programs that can enable homemakers to take an **active role in household finances, creating wider social impact.**
- ▶ **Group engagement for homemakers:** Curate programs with **community/group engagement** to increase their value proposition.

Content curation

- ▶ **Content curated for homemakers:** Homemakers are spending more time on online and OTT platforms. More content targeted for homemakers and suitable for family/shared viewing can be curated.
- ▶ **Learning based content on OTT:** With health, cooking, DIYs and self learning coming up increasingly as leisure activities, content on similar topics should be created to tap homemakers' interests.

Policy and incubation support

- ▶ Young **homemakers are entrepreneurial** in nature and are **already working on business ideas.** To enable implementation of these ideas, organizations and governments could support **incubator programs and develop supportive financing options.**

Flexible and supportive employee policies

- ▶ With WFH becoming more established, homemakers are looking to engage their time in taking up **remote working** opportunities. Organizations should **relook at the structure of their workforce to leverage the skills** offered by this untapped section of the population.

Humans in a pandemic series

This report is a product of the EYFCUX Design lab

EYFCUX focus on understanding human sentiments, business ecosystems and their impact on each other.

We want to study how fragile human relationships evolve in the current situation and how these evolving situations challenge loyalties, long established behaviors and the resulting digital awakening.

We provide user research, design thinking and customer experience design.

Get in touch with us for more such reports!

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