

## Across the globe COVID - 19 has impacted us at a primal level

Protect myself and my family

Protect my livelihood

Protect my way of life







## India is grappling with immediate ramifications of this outbreak





Forced to not leave







home unless absolutely critical Social

Panic buying

Only essentials available as India entered total lockdown

Digital consumption

Rise in digital consumption due to isolation

Innovative ways of maintaining social distancing

distancing

Lockdown living

Fears and confusion led to panic buying

Restricted services

Rise in fake news and misinformation across social media platforms Fake news











## This black swan event has accelerated change on key customer dimensions



1

### Digital customer journey

- ▶ Digital adoption to increase across all customer journeys from pre-purchase to post-sales. The impending recession and consumer reluctance to engage physically will accelerate the evolution of 'post Covid digital-only' models
- ► Acceleration of new products and services to exploit this increased comfort with digital journeys

2

### Hyperlocal and online communities

- ► Hyperlocal community interaction to increase
- ► Digital person2person interaction
- ► Work from home
- ► Growth in the power of digital influencers

4

### Digital content consumption

- ▶ News and entertainment
- ▶ Digital learning
- ► Gaming, events and experiences

3

### Healthy living

- Greater focus on healthy living and proactive health maintenance
- ▶ Increase in consumption of health, fitness, and supplements
- ► Increase in organic/healthy eating habits
- ► Move to online medical care and assistance

5

### Consumers and the State

- ► Greater awareness of security and privacy
- ► Set up of state surveillance infrastructure
- ▶ Discipline, accountability and traceability

Source: EY research



## Consumer behaviour seems to have changed for good across these dimensions...



#### **Digital customer** iournevs

Grofers - New orders up by 14-15%, Number of orders from the existing users 2X the past week.

https://www.businesstoday.in/current/corporate/covid-19-online-grocery-platforms-to-benefit-as-consumers-flock-to-shop-

Big Basket - There has been a 2x growth in traffic and revenue and there has been a 15-20 per cent increase in basket value

online-grocery-platforms-to-benefit-as-consumers-flock-to-shop-online/story/398600.html

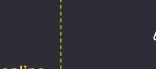
BAIC BJEV, Jetour - In China, online car sales went up in the first weeks of the crisis. Baic Bjev and Jetour, the two brands with digital retail experience have managed to secure a place among the Top 5 players in terms of search volume

https://www.reply.com/en/covid-19-report



#### Hyperlocal and online communities

Post imposition of lockdown, many organisations in India started using virtual collaboration tools such as Zoom, Slack, Microsoft Teams etc. to be virtually connected



# livina

will hit 200,000 in the next one week," said Ankit Nagori, cofounder, Cure.fit.

asana-indians-go-big-on-yoga-from-home/articleshow/74741684.cms?from=mdr

Sarva - Rolled out classes on Instagram earlier this week, saw 1,000-1,500 people have been attending sessions every day.

asana-indians-go-big-on-yoga-from-home/articleshow/74741684.cms?utm\_source=contentofinterest&utm\_ medium=text&utm\_campaign=cppst

Portea - Live video consulting facility for physiotherapy a full-fledged service a couple of weeks back.

https://www.thehindubusinessline.com/info-tech/how-online-healthcareis-stepping-in-to-serve-non-covid-19-patients-in-india/article31179651.ece

Push Doctor - The pandemic has pushed digital health into the mainstream: Push Doctor saw a 30% increase in consultations. Last week, consultations were up by 70%.

https://sifted.eu/articles/digital-doctor-demand-coronavirus/



#### Cure.fit - "The number of people using Cult-.live: Voot - "What we would have expected to do in terms of number of subscribers in 60 days, we have already done in the first 10 days." Ferzad Palia, head of Voot Select, youth, music and english entertainment of

https://www.business-standard.com/article/companies/spike-in-viewership-across otts-as-indians-binge-watch-staying-indoors-120031801866\_1.html

Amazon - Change in content formats provided various providers such as Amazon Prime are providing special free catalogue for family and children to boost consumption

Viacom18

https://www.livemint.com/news/india/covid-19-streaming-services-experiment-with-free-offers-as-people-stay-home-11585036708397.html

Unacademy founder and CEO Gauray Munjal said, "In the last three weeks, learners who are watching free live classes have increased by 3x. We are clocking 30 million minutes of watchtime on Unacademy every single day."

companies-see-spike-in-number-of-students-11584724448197.html

Yahoo! News unique audience increased by 24% (Daily Average - 21,727) in Japan amid COVID-19 concerns

https://www.nielsen.com/wp-content/uploads/sites/3/2020/03/The-Impact-of-COVID-19-on-Media-Consumption-Across-North-Asia.pdf



Andhra Pradesh has made a list of 25,000 people who are on COVID19 risk due to their travel history. They are tracking them through their mobile numbers and alerting teams If somebody is breaking quarantine.

https://www.businesstoday.in/latest/trends/coronavirus-crisis-andhra-pradesh-govt-tracking-mobile-phones-of-home-quarantined-people/story/399692.html

Karnataka government directive the home guarantined coronavirus suspects & patients will have to send their selfies every one hour on

the Quarantine Watch, a mobile application developed by government's revenue department to keep a track of the isolated persons. The government warned the home quarantined people that they will be sent to mass guarantine centres if they violate the rule.

send-selfies-every-hour-to-govt/articleshow/74907051.cms?from=mdr

China has reportedly relied on mass surveillance of phones to classify individuals by their health status and restrict their movements.

https://www.sciencemag.org/news/2020/03/cellphone-tracking-could-help-stem-spread-coronavirus-privacy-price

employees to work from home from-home-in-coronavirus-hit-china/ WeChat Work also saw a 10-fold

DingTalk moved from 40th to 3rd

many companies have asked their

position in usage in China as

increase in usage

statistics/



## ...posing unforeseen challenges for businesses across the nation



Closure of front offices – sales outlet/showrooms etc.



Complete lack of demand apart from essentials items



Major supply chain and logistics issues due to lockdowns



Working capital and cashflow issues



Issues regarding employee safety and losses



No contact with customers who are not active on digital channels

Response examples

Creating awareness among customers with new company logos promoting social distancing

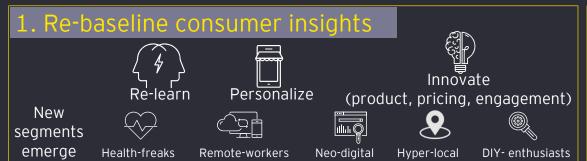
Providing customers with additional and emergency services to help them amid COVID-19 scenario

Enabling employees with required facilities to work from home

Pushing/encouraging customers to adopt digital modes of purchasing or enquiring about a product



## Five key action areas emerge as the new epicentres of customer focus







Re-imagining brand in the digital only world



Integrated real time Realign marketing marketing communication spend



### 3. Digital-only



Leap from physical to digital-only



Redesign all parts of customer journey to enable digital



Restructure customer operations for Direct2Consumer



Launch digital coll products ne

### 4. Remote collaboration



Competitive collaboration in face of new consumer needs



Incubate cross-functional teams (shift from functional focus to consumer)



Evaluate cultural aspects of virtual teaming

### 5. Virtualized sales and service



Merged frontlines (Sales + Service)



e-tail with reduced channel dependence



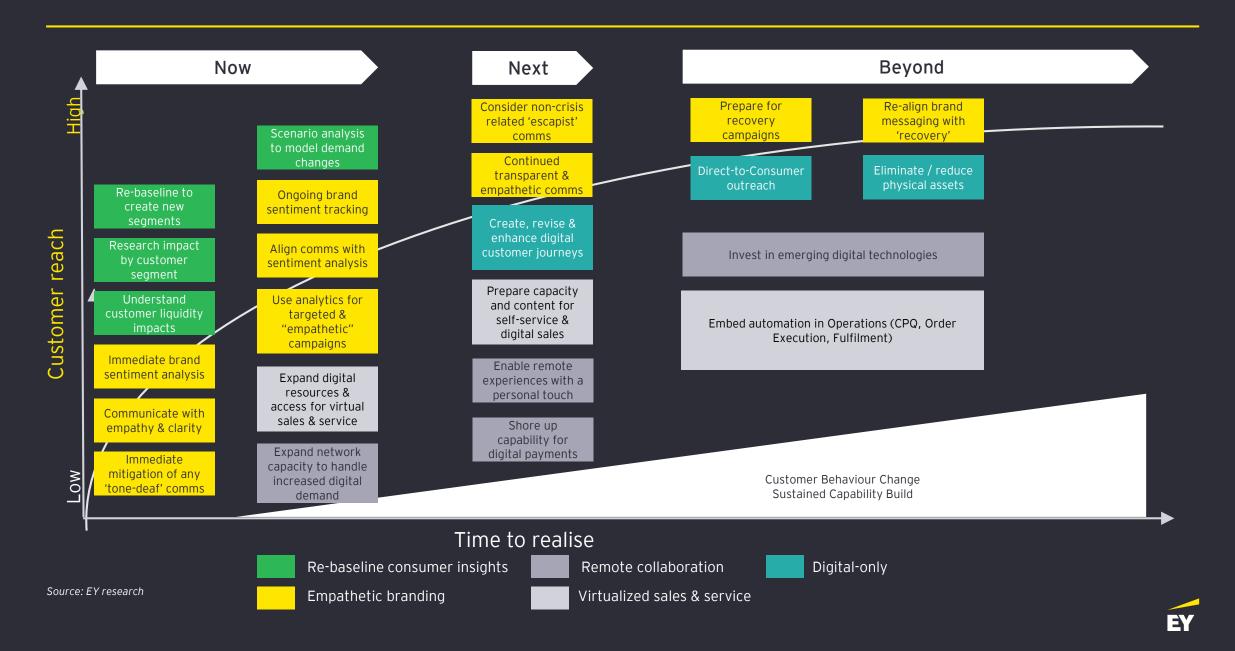
Online consumer community based sales and service



Proliferation of selfservice, DIY culture



## Planning the now, next and beyond scenarios is critical to survival



## Call to action: immediate measures to ensure customer excellence in the face of imminent challenges



### Re-baseline consumer insights

- ► Focus on risk mitigation and business continuity
- ► Proactively set customer expectations regarding changes to product and service offerings

insights and re-learn their expectations and needs to create new segments

► Deepen customer research segments are impacted in

► Unlearn pre-COVID customer

efforts to understand which what ways

**Empathetic** branding

- ► Engage with customers through proactive communication and assistance
- ► Demonstrate organisation's brand and purpose in communication with customers
- ► Focus on tracking brand sentiment and conduct analysis driven campaigns
- ► Communicate with empathy, be responsible with brand promises and promotions
- ► Use analytics for targeted and relevant marketing
- ► Enhance digital marketing in B2B
- ► Prepare for recovery and a planned digital marketing / communication plan

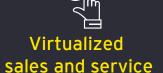


- ▶ Build and strengthen E-Com relationships and shift focus to active channels and customer segments
- ► Monitor regulatory requirements and approvals
- ► Expand network capacity to handle increased digital demand
- ► Pivot to identify and assess new revenue streams
- ► Ensure website and digital ordering resilience to eliminate the need of middlemen like dealers, retailers
- ► Promote self-care and autoticket logging to eliminate the need of contact centres



# collaboration

- ► Enable "Work from home for sales force" through digital means
- ► Review all non value added activities to minimize physical movements/use of low cost automation
- ► Explore use of emerging technology and automation to reduce people contact and eliminate risk
- ► Invest in emerging technologies such as VR for remote product walk-throughs to enhance B2B sales interactions
- ► Call centre: Seek to partner with external providers for over-flow or accelerated capacity. Tap into the gigeconomy where appropriate



- ► Realigning after-sales service to provide best feasible support
- ► Agile sales team management through beat restructuring, recrafting of roles and clear communication
- ► Redeploy ASP spends to promote channel liquidity, channel partner loyalty and new channels
- Expand network capacity for increased digital sales demand
- ► Call Centre: Expand resources & access for remote workers to enable a virtual contact centre
- ► Consider AR or visual search in a repair scenario



of new

seaments



innovation innovation



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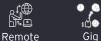


Digital targeting marketing









working



Gig culture











contact centers sales



Immediate

Medium-term

action

## **KEY CONTACTS**



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