

Decoding consumer sentiment towards celebrations in times of COVID



Target Group & Sample Design

| Age group | Delhi | Mumbai | Kolkata | TOTAL |
|-------------|---------------------|---------------------|----------------------|----------|
| 18-24 years | 1 Paired DI | 1 Paired DI | 1 Paired DI | 3 units |
| 25-35 years | 1 DI 1 Paired DI | 1 DI 1 Paired DI | 1 DI 1 Paired DI | 6 units |
| 36-45 years | 1 DI 1 Paired DI | 1 DI 1 Paired DI | 1 MGD 1 Paired DI | 6 units |
| | 5 | 5 | 5 | 15 units |

Gender: Men, women

Age: 18-24 years, 28-35 years, 36-45 years

NCCS: A, B

Mix of different communities

Occupational profile: Mix of those who engaged in business / service

Methodology: Depth interviews

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7. Prudent and purposeful purchases

3. Codes of gifting this festival season

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Chapter 1:

The Impact of COVID



The realities of new normal among different cohorts



1.1 Young feeling old - anxious and grappling with the pressure of premature adulting

YOUNG COHORT 18-24

CONTEXT

From the outside, young adults should have been most equipped to deal with this situation given their youthful exuberance & comfort with technology. Instead, they are most overwhelmed by grim realisation that they will miss out on defining experiences of their life

Aiming high but shooting in the dark

Running on virtual time table, no savoring last months' with their friends & peers or graduation ceremonies; or even joining new jobs is dialling up the existing sense of uncertainty.

The loss of a social network [which gave them security and learning] has made the situation more stark - they are now left to fend for themselves.

Navigation through career milestones a challenge, since they do not have access to their regular school / college eco system of peers, teachers, education counsellors, placement cell etc. For many final year students, placement has remained a mirage so far

Despite the cloud of anxiety & despondency, they are trying their best by learning new skills and using digital mediums to stay sane

Growing up fast at the expense of youthful excesses

This young generation has had a reasonably affluent upbringing & were supposed to have a good run.

COVID 19 has inadvertently forced them to pause & reflect. With HH income flow becoming uncertain, they have been pushed to grow up suddenly.

Feel the need to take up responsibility & contribute to their family, along with strong with a 'do or die' desire to learn stand out skills as only that can guarantee a cushion against uncertainty.

This generation has traded off 'fun' for 'stand out skill' 'employability' and this may go on to define an exaggerated focus on job/career security for this generation.

CONTEXT

These consumers were on a steady path of building careers and family. However, the sustained nature of the crisis has made them frustrated with the constant need to be 'ON' and micro managing key aspects of their lives across work, children, elderly members including additional workload due to COVID

Doing more despite being stretched to their limits

This age cohort is dealing with the pressure of stretched responsibilities given that they have young children.

Men are also contributing to household chores and parenting while women are juggling between expectations of work and family. They are also trying out new entrepreneurial ideas to minimize the impact of financial pressures caused by this pandemic.

However, the magnitude of cognitive load is leading them on the verge of burnout

Protect or nurture: a parenting dilemma

Young parents are torn between protecting the health of their children and parents, while limiting their growth and freedom.

While the focus has been on protecting one's self and family from the threat of COVID, the sustained restrictions are weighing on the mental wellbeing of children and aging parents

1.3 You gain some but don't lose some

SETTLED FAMILY COHORT 36-45

CONTEXT

The older cohort look at this as a surprise “check-in” and an opportunity to improve quality of life. Given their life stage, they are better poised to reap the unintended benefits of this pause

Realizing futility of rat race, getting off the clock

They have come closer as partners, as parents. Have fun doing chores like cooking, cleaning. They have discovered simple joys like eating together, savouring heart-to-heart conversations, thereby rekindling relationships.

Appreciation of forced 'slow down' & weaving the same into their life, emerges as a theme that is likely to sustain beyond COVID

Reinvented self care with renewed appreciation for life

With the usual pursuits of money & status on hold, they are seeking life's purpose, aspects that truly matter & transcendence.

Having incorporated healthy & meaningful activities into their routines, they are leading a much fuller & purposeful life

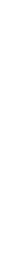
Ability to shepherd those around them in these difficult times since they are far more in control of the situation

A framework for understanding how consumers are navigating COVID

How consumers **seek** in times of crisis

Reset

Understand the situation and change self orientation



Fluidity

Ability to change, move with the tides, finding an equanimity

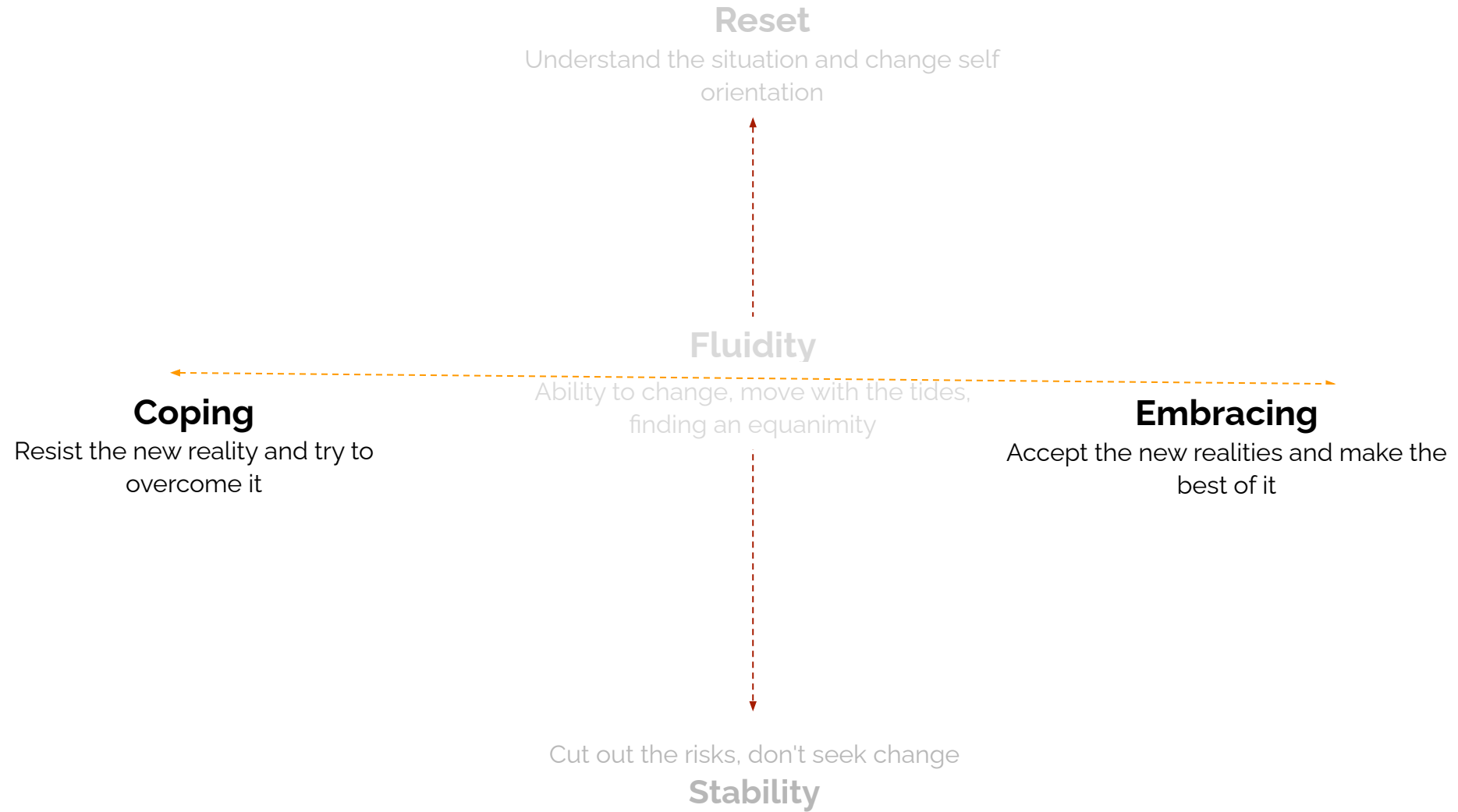


Cut out the risks, don't seek change

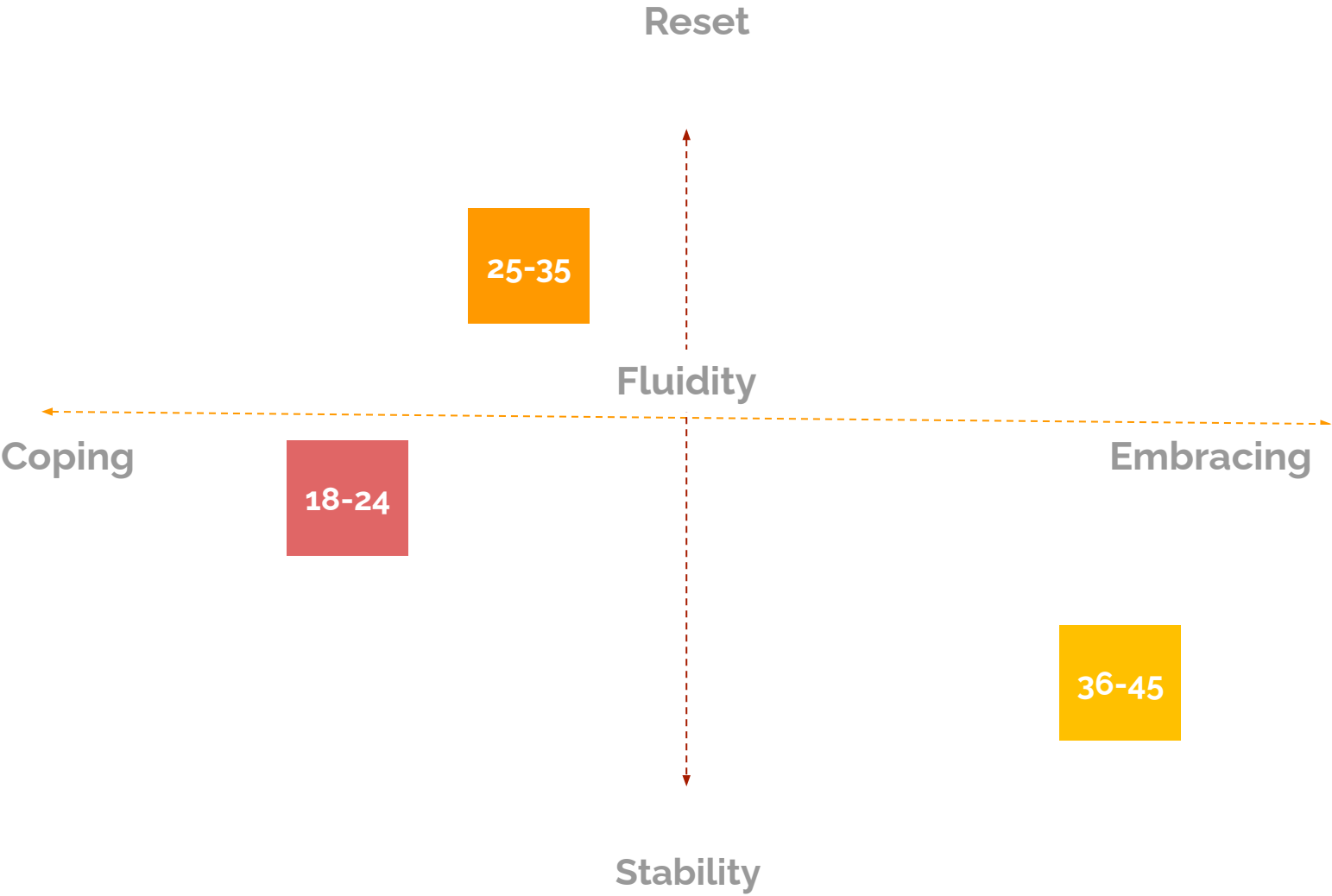
Stability

A framework for understanding how consumers are navigating COVID

How consumers **feel** in times of crisis



Plotting
consumer
cohorts on
the axis



Summarizing the cohorts

18-24

Outlook:

High levels of uncertainty, angst towards their situation and the world. Anxious about the compromises in student life, learning and career options

Expectation from themselves:

Seeking to excel, beat competition and still have youthful life events to look forward to

25-35

Outlook:

COVID drove uncertainty into family life and work and they are still trying to coping with the changing requirements in both areas

Expectation from themselves:

Desire to get back to the same level of economic stability, find ways of de-risking them from future shocks

36-45

Outlook:

Positive feelings around the slowdown, as they have the time and privilege to explore themselves (spiritual, reflective), their family and develop closer bonds

Expectation from themselves:

Want to continue the personal leadership of managing safety and well being of family in uncertain times

Celebrations nourish us psychologically, emotionally & spiritually. It makes us pause & be mindful which boosts our well being. This pause helps us buffer ourselves & build resilience.

Its importance can be attributed to the fact that it helps meet people's needs for inclusion, innovation, appreciation & collaboration.

In the midst of pandemic, balancing safety norms while still observing festivals manifests in *different* ways of celebration

Chapter 2:

Celebrations in times of COVID



It is about preserving, modifying & exempting rituals



2.1

Good celebrations come in small packages

Traditional, Indian festivals have a pre-ordained pattern; one where there is a prelude of rituals, amping up of excitement, a large coming together around food and then a group celebration

This year, consumers accept that festivals would have restrictions and have adapted certain parts of festivities to reflect a curtailed version

They use technology and ingenuity to help each other enjoy multiple smaller moments of celebration *lexample instead of worshipping the idol, rituals were performed on certain plants/ earthen pots I*

While the moments are smaller and spread across, the unbridled passion for enjoyment remains



Navratri this year

Celebrated in a simple, small scale but passionate way

Replacing rituals of navratri such as Garba, Durga Puja which required extended physical contact with multiple smaller virtual celebrations

"Only 3 people allowed at once at the pandal, so we exchanged photos of the pandal instead. Some of us put 'Ghot' [pot with particular accoutrements] and did the daily worship of mother Goddess. On the tenth day [Vijaya Dashami] we did some zoom calls, showing what sweets we ate for Bijoya Dashami"

"This year the Gujarati community in UAE conducted garbas on Zoom. My mother also learnt how to log onto Zoom since nobody was able to go out. It was live on Facebook."

Beyond the indulgence and excitement, an occasion to enjoy the little things about the festival

Express gratefulness, generosity and explore lesser known rituals

"Diwali can definitely help us douse the current mood. We will bring in classy lights, flowers and no Chinese products. We will do Laxmi Puja with same fervour and replace crackers with more lights and decoration"

"We have splurged enough all these years. The excesses were uncalled for. Am actually feeling very relieved - I will just use my stuff properly and deck up the place. We will try to do more at home"

2.2

Relaxation of norms & rituals of the festival

*Every Indian festival has a **'norms and rituals-driven'** part to the celebration which is mandatory as well as an **'unrestrained enjoyment'** part which everyone remembers them by*

We see that COVID has enabled consumers to side-step some of the 'norm-driven' rituals which are difficult to perform because of the restrictions stemming from the pandemic.

Consumers are picking elements which ignite the spirit and joy of the festival while deprioritizing rituals and elements that are too hard or fatigued to follow



Navratri this year

Protect the intent and not the ritual

Kanya Bhoj was modified to make it easy to carry out

"This year kanya bhoj was done but outside house. Food was packed in boxes and then distributed"

Instead of partaking in the Ravan Dahan which is a publicly organized ceremony, consumers find creative ways of displaying this at home

"Cousins made ravan out of balloon and kids burst it, which was very innovative and environment friendly way. We decorated and made rangolis at home"

Deprioritizing cleaning and high physical effort rituals:

"It used be a frightful affair when my mother-in-law used to be around. I used hate the countdown. However, now am not stressing as much. Will just do basic cleaning as a symbolic ritual -remove crap, clean backyard, clean cupboards"

"Kitchen cleaning will done elaborately. Rest of the house, I will do as much as possible, clean main drawers, sort papers, clean almirah. Fans & lights are cleaned regularly anyway"

**Burning of Ravan, a mythical Asura king, to symbolise the win of good over evil*

2.3

Celebration reflects sanctity

Traditionally, consumers were not as mindful of the mythology or even the cultural context of the festival. They took it for granted and went with the established pattern of celebration

Ironic as it may seem, as conventional celebrations are being performed in a restricted manner, consumers are more engaged & appreciative of its nuances.

This deeper engagement with mythology and spirit of the festivals means that consumers are seeking greater insight about the festival and may even see passe representation of the festival as shallow



Navratri this year

Sanctity and spirit of take precedence over observation of rituals

Garba, Dandiya and Kanya Puja not participated in, but watched or done with limited number of people.

Consumers now live the essence, not the ritual

"It's not just about dancing or eating...Values that it depicts is celebrating the female energy that becomes dominant at this time. It beckons our inner strength / life force. We feel grateful for it."

"The Garba dance happens around the 'Garbha Deep' (womb lamp) to honor the fact that all humans have the divine energy of Devi within them. This year we celebrated by doing pooja at home and since there were no other distractions, we made bhog, offered to the Goddess & then we had it"

**Garba is a dance form which is practiced as a community for 9 days of festival celebrating 'Shakti' [Goddess] time on earth*

2.4

Celebrating the real self, not the perfect self

Festive days were marked by personal aesthetics that displayed opulence, perfection and stand-out value

Fuelled by desire & social competitiveness, typically women made elaborate efforts to dress up during these festivals to look their best decked up version.

This year, consumers have decided to go ahead with 'doable' glamour, sidestepping elaborate, established standards of the 'right' look

This year, the festive self is authentic and assured; desire to live up to elaborate standards of beauty is no longer relevant



Navratri this year

Desire to enjoy dressing up than worry about how the external world views it

From grand outfits that was to live upto external standards of what is acceptable, this year it is to feel good about yourself → outfits are still worn, showed off but with the idea of doing one's best and enjoying the occasion

"Celebrated at home, didn't wear new outfits everyday and did not go out to meet family friends, Only daughter got ready but she didn't go outside the house to play garba. It was fun for me to help her dress up and enjoy"

"Dandiya couldn't be done as it can't happen virtually. Joyous part was missing. So dressing up for calls or meeting few people is something nice to do"

There is an understanding that dressing up would be part of festivity, but not with the elaborate endeavor as in previous years - even already worn, near new outfits are acceptable

"We wear new clothes, I wear traditional jewellery. Earlier I would buy new outfits. But, there are too many clothes anyways. Earlier there is used to be so much competition with each other. For a change there is no social pressure. This year Diwali is about do what you want for your own satisfaction."

"We will order few outfits online and wear make up - we will meet some friends nearby. It's something I want to do because there was no occasion to look good"

2.5

My artful and mindful celebration

Most indian festivals is about forgetting the self and being part of a collective community. Uniformity and conformity is expected, and doing things 'the way it is meant to be' is important

However COVID has made the celebrations different this time by evoking ingenuity and mindfulness.

There is a shift from a templated approach [preference for industry made, standard look and feel] towards celebratory rituals and implements that look more [or even created by] handmade, DIY, quirky and personalized for micro-context of that particular home. For ex: sweet making at home, painting diyas, decorating lights by self



Navratri this year

Adding an individual touch as opposed to following the norms

Making homemade snacks and meeting the few friends who matter; gifting them what they will find special

"Nothing else was arranged in the community.. On ashtami we managed to meet few girls outside our society, which makes us emotional.. We just gave them some gifts, chocolates and home made snacks, which they won't mind and enjoy....not trying to show off or anything"

A twist of cleverness

Trying to make 'virtual' connections more exciting → Go beyond just seeing and appreciating by having online contests

"Everyone usually does video calls, so to make it even more special we had a competition for mandir decorations on Janmashtami Puja"

Making own Diwali diyas and sweets oneself. It doesn't matter if they are less in number or spread, they become special because its made by hand

"We will be making milk cake at home and getting ladoo from outside, because we don't know how to make ladoo" "Home decor is priority, we'll decorate the house differently ..like hanging pretty lights, painting diyas"

Trying to reuse and repurpose items; gifting items that fit with the renewed focus on health

"Nothing will be bought. We will use the ones used last earlier. Made in China goods are banned this year"

"Food hampers will be purchased but we will ensure the assortment is healthy. No namkeens, will opt for pumpkin seeds & flavored makhana etc".

2.6

A new language of celebration: compassion & belonging

"We are not all in the same boat. We are all in the same storm. Some are on super-yachts. Some have just the one oar."-

Damian Barr, April 21, 2020

The pandemic has exposed economic challenges being faced by those around us. The shared experience of strife & anxiety has led to an intuitive understanding of each other's struggles in consumers' mind.

This 'unspoken' connection has lead them to look at the festive season differently. The feeling of gratitude & somewhat latent guilt among those who have is resulting in tempering celebrations & giving to those who have less

This is a movement of 'giving' and 'compassion' moved from being tied to the religious to the celebratory territory of festivals



Navratri this year

Finding as greater sense of equality

A connection of facing a same concerns no matter who you are making everyone a bit more equal

"This COVID is that we have seen that everyone's in life rich or poor have stuff to deal with. It has exposed that idea....it doesn't matter who you are, we are all vulnerable....It's on our mind always this season."

"Everything is different this time for [Puja] but the happiness is same as before,..... as we tried to be happy with the limited options we had, by finding happiness in others happiness.. Felt togetherness like always.."

Emotion and connection more important than celebration

Celebrating togetherness with the concerns of others in mind

"This year also we celebrated Navratri in a very emotional & passionate way. We were at home only because we understand it's important keep the interests of everyone in mind"

Celebrating togetherness with the concerns of others in mind

"Feeling sad and grateful both, as we are not together as a whole family but grateful that our immediate family is safe and sound. We feel bad for those who are going through rough times"

"Feeling good about meeting close family members, but bad about not meeting friends"

2.7 Prudent and purposeful purchases

Festivals, like Navratri and Diwali, are big occasions to splurge. Not only that, but spending less and skimping on festivities has strong 'inauspicious' code surrounding it

However this year, propensity to splurge has been relatively muted. While consumers are open to spending but there is an effort to maximise the value they are getting out of spends. The focus is shifting from 'how much' to 'how well' they have spent for the festival.

The consumer is spending less on new clothes, crackers, painting their homes, jewellery but ready to spend on decorating house or buy high quality gifts, and gadgets and appliances or even donate to a charity



Navratri this year

Greater consciousness about value of spends

Reuse and maximize as opposed to acquiring the newest and most in vogue



"Did no shopping for garba night this time, which is the most exciting part of the festival..we just used the same clothes from earlier...it felt like the better thing to do"

Supporting those who are more deserving

"Did not do any unnecessarily shopping, more focused on money saving, and donation.. Feeling grateful to not have many financial crisis till now even in this pandemic that we can help others those who are in need.."

Chapter 3:

Codes of Gifting in this

 Festival season 

What we know about the codes of gifting during celebrations

- **Gifting is much more about the person who gives the gift as the receiver.** Gifting showcases generosity, taste and the value he/she confers in the relationship
- Gifts are powerful means in **establishing social hierarchy and reputation** especially in customary occasions
- Rules of 'Value for money' and 'utility' are suspended during the celebratory gifting period → Focus is on **showcasing ones best face and gaining the most recognition for the sender**
- Gifting **establishes a forced reciprocity on the receiver** especially in customary occasions; not reciprocating is seen as loss of face/disrespectful

We see some of these codes being augmented by the effect of COVID this festival season and some new themes emerging. These are discussed in the next slides



3.1

Key Gifting themes this festival season

Gifting each other health

The health focus accentuated by COVID makes consumers consider gifts beyond the traditional repertoire of sweets and namkeens

Unhealthy things not be gifted..... Food hampers will be purchased but we will ensure the assortment is healthy. No namkeens. Instead opt for Pumpkin seeds & flavored makhana etc.

We have decreased our budget and will buy dry fruits for only those who are very close...we will ensure there is not products bad for their health and immunity

Consumers are extremely conscious about the inequalities of modern life in cities as highlighted by the pandemic. This forces them to go gift more to those deserving than those just close to them

Those who have suffered deserve more for Diwali.....people are confused about spending...but they want to donate to the right people

3.2

Key Gifting themes this festival season

Quality over quantity

Consumer focus is not on how many but how well you have gifted this year

"Not gift as many people as before....We have decreased our budget and will buy dry fruits for only those who are very close to us....but we will get the right gift for everyone"

3.3

Key Gifting themes this festival season

Seeking contentment and not recognition

Consumers want to focus on the satisfaction that gifting brings to them this year, because the spread and grandeur is not relevant at this time

"Avoiding to go out and purchase gifts. shopping and logistics will become online this year.Gifts should be special as these are difficult times and everyone has suffered.....it can be simple...."

Celebrations - A cohort wise overview

18-24

Outlook:

High levels of uncertainty, angst towards their situation and the world. Anxious about the compromises in student life, learning and career options

Expectation from themselves:

Seeking to excel, beat competition and still have youthful life events to look forward to

Celebration in COVID means

Overcoming loss of conviviality with technology; Making the best of what is possible. Adding a twist to conventional rituals

Codes that may stay beyond

Appreciating the smaller, simpler and less louder way of celebration

Building greater connections with family as opposed to friends during festivals

25-35

Outlook:

COVID drove uncertainty into family life and work and they are still trying to coping with the changing requirements in both areas

Expectation from themselves:

Desire to get back to the same level of economic stability, find ways of de-risking them from future shocks

Celebration in COVID means

Celebrating closeness with the immediate family, Being cautious with spends and seeking to get most value out of purchases

Codes that may stay beyond

Reducing the spread of celebration to focus on quality.

Greater emphasis on health during celebrations.

Greater focus on authenticity in celebration than what's demanded by social pressure

36-45

Outlook:

Positive feelings around the slowdown, as they have the time and privilege to explore themselves [spiritual, reflective], their family and develop closer bonds

Expectation from themselves:

Want to continue the personal leadership of managing safety and well being of family in uncertain times

Celebration in COVID means

Deliberate steps to bring together closeness [creating and expanding rituals, developing family based group tasks, be present for others to coach or counsel

Codes that may stay beyond

Understanding that privilege is not be taken for granted. Opening up to the idea of sharing and contributing in celebration

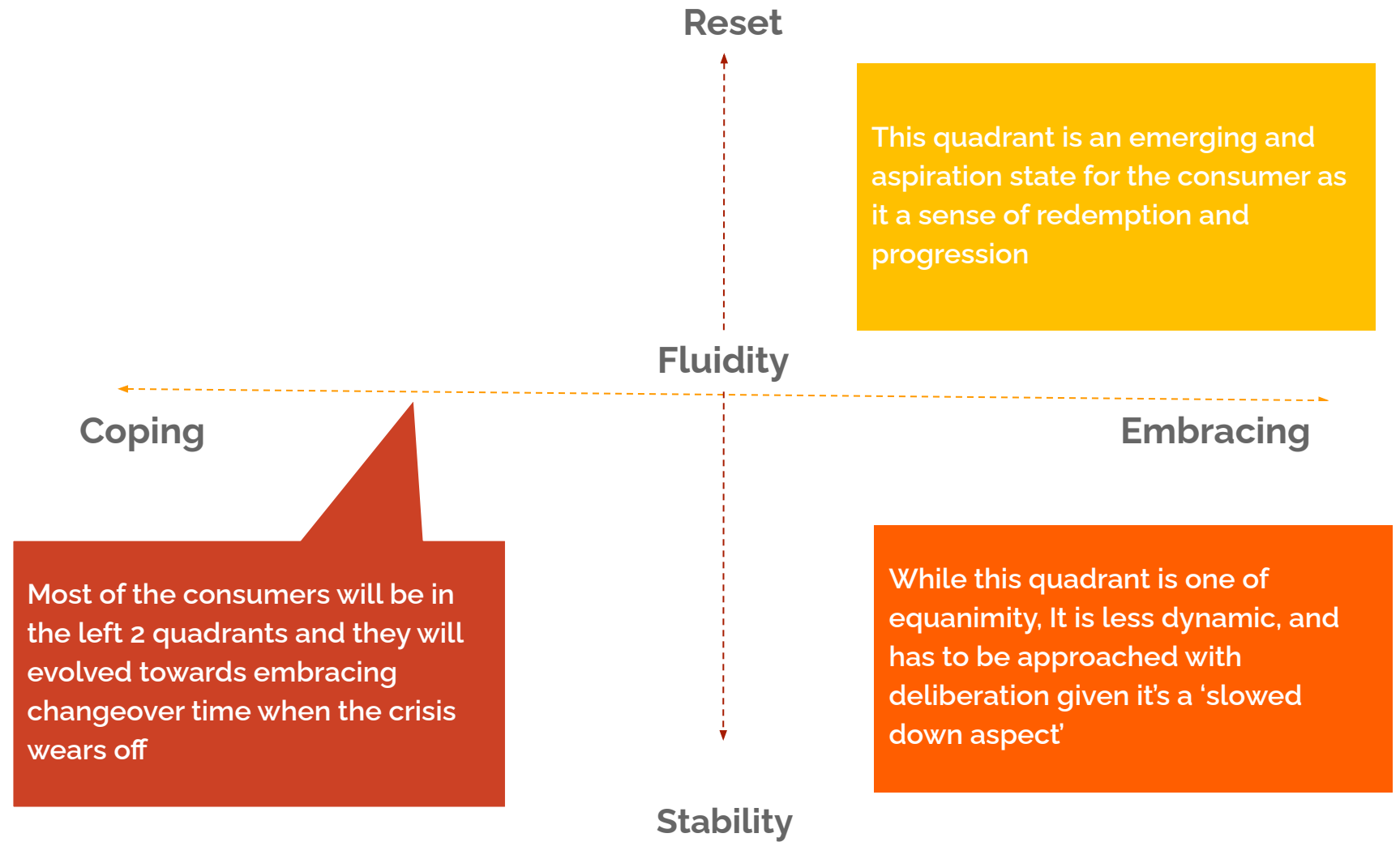
Chapter 4:

Role of brand

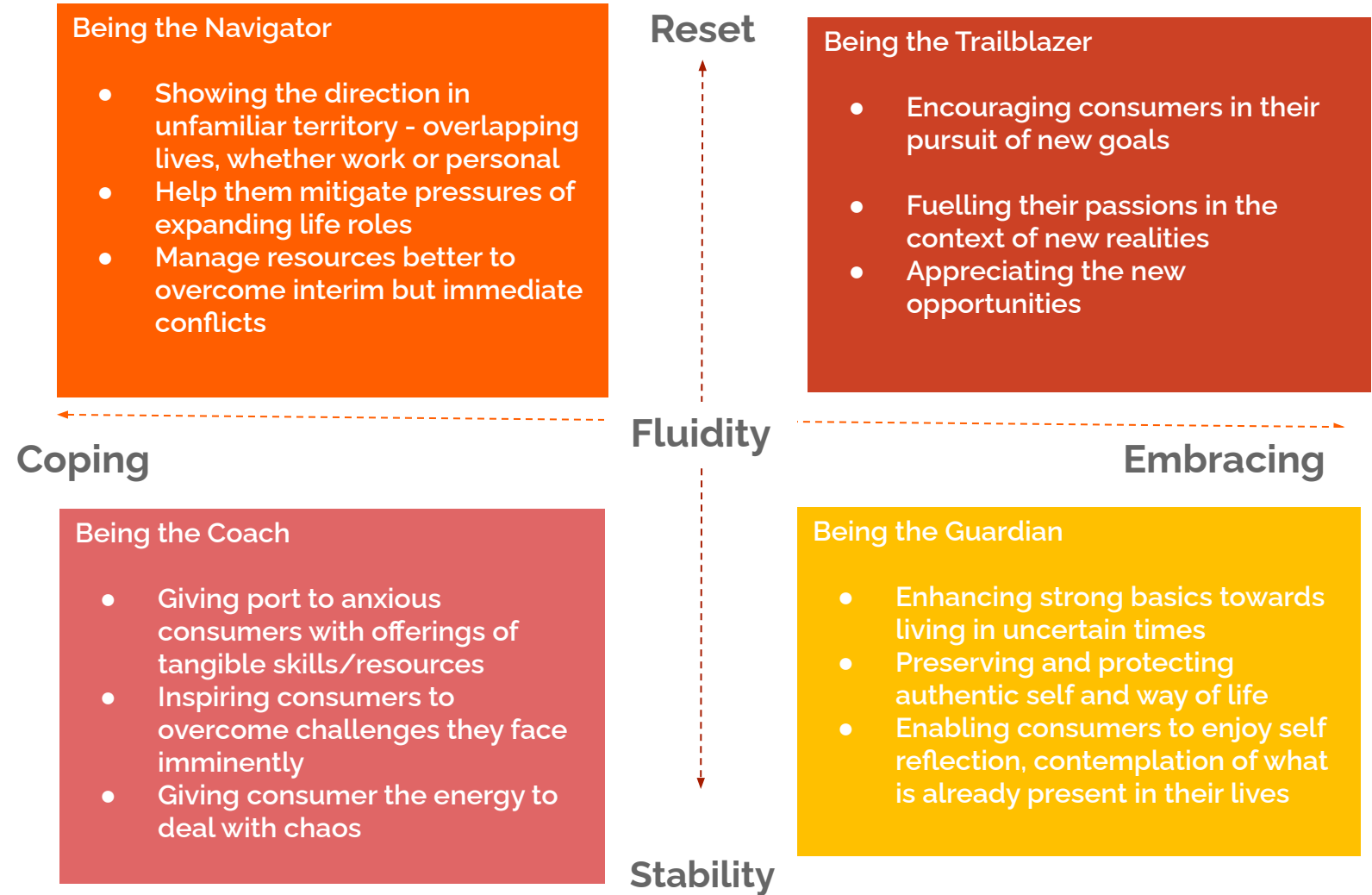
communication



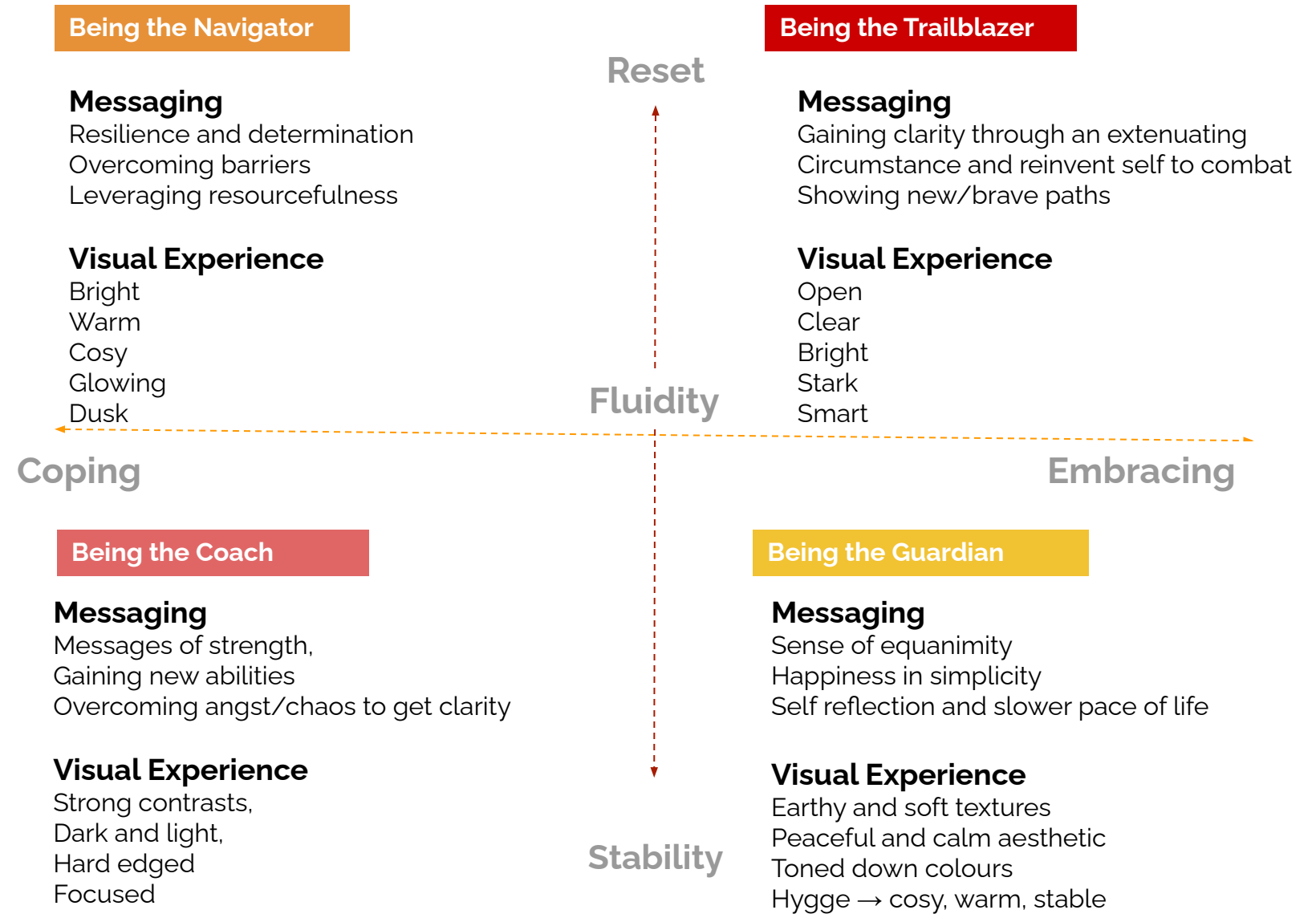
Consumers reflect a certain outlook based on their COVID experience



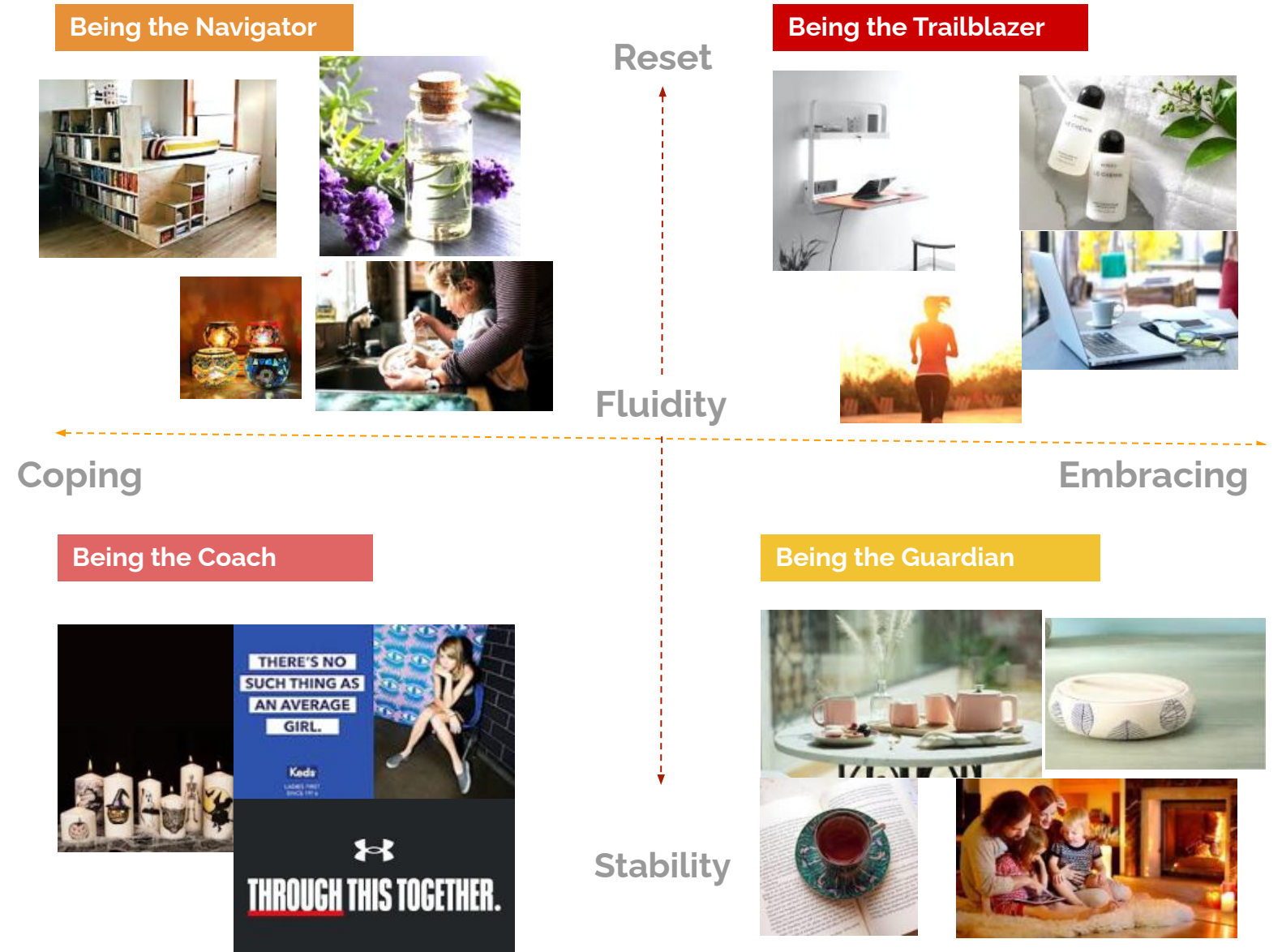
Each quadrant reflects a brand language that could appeal to consumers experiencing the impact of COVID



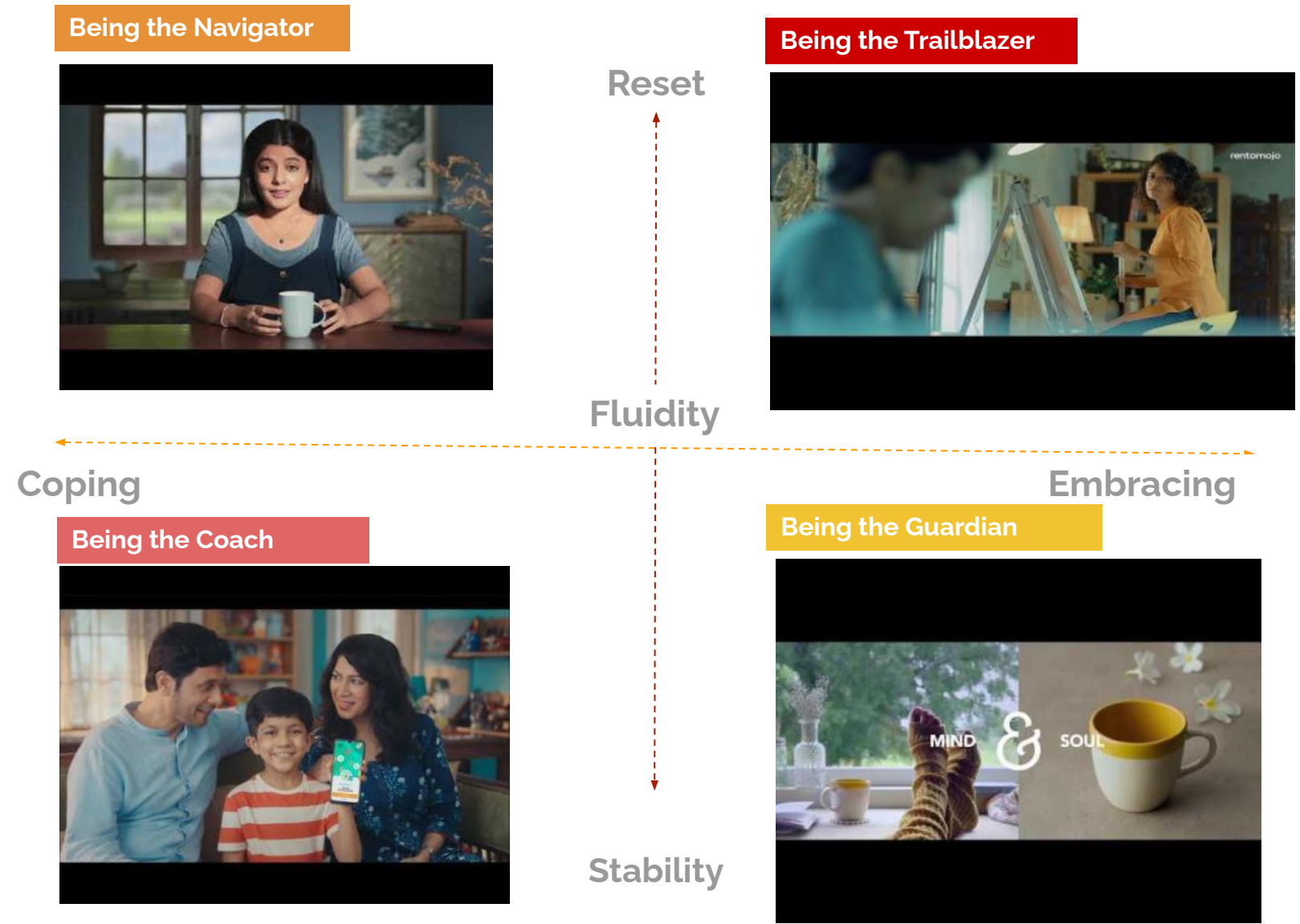
Messaging cues for each key spaces



Visual cues for each key spaces



Each quadrant reflects a brand language that could appeal to consumers experiencing the impact of COVID



CLICK ON IMAGE TO PLAY VIDEO



The End

