

## RAMADAN DURING COVID-19

A data-driven look  
at changing  
consumer behaviour  
for marketers



One in four people in the world are Muslim, representing a population of 1.8 billion. As most of Southeast Asia goes into social isolation, people are starting to fear its effects on Ramadan and the festive period that follows.

Neuroscientists are predicting that this could lead to a “loneliness epidemic” which can be as detrimental to health as smoking 15 cigarettes a day.

This will be heightened for Muslims during Ramadan. The season centres around group gatherings, tarawih prayers at mosques, and breaking fast together as a family.

While it might seem simple for some to say that these practices should be done away with in situations of emergency, it isn't quite that easy to overlook practices that are considered compulsory and represent an integral part of the faith.

In short, with scientists warning that we may have to undergo social distancing for at least 6 months or more, this year's Ramadan will look very different. We have to be prepared for a stay at home Ramadan.

Our data experts dived into our XACT data of over 375 million datasets to uncover that:

1. Offline activities will continue to fall but this doesn't mean your consumers have disappeared.
2. Many will seek out online substitutes instead, creating a new stay at home version of Ramadan.
3. Brands need to make 3 key data-driven changes to their marketing strategies in order to survive.





# 1

All offline activity will  
continue to fall

*Less travel out of country will create displaced individuals.*

**What we have seen so far**

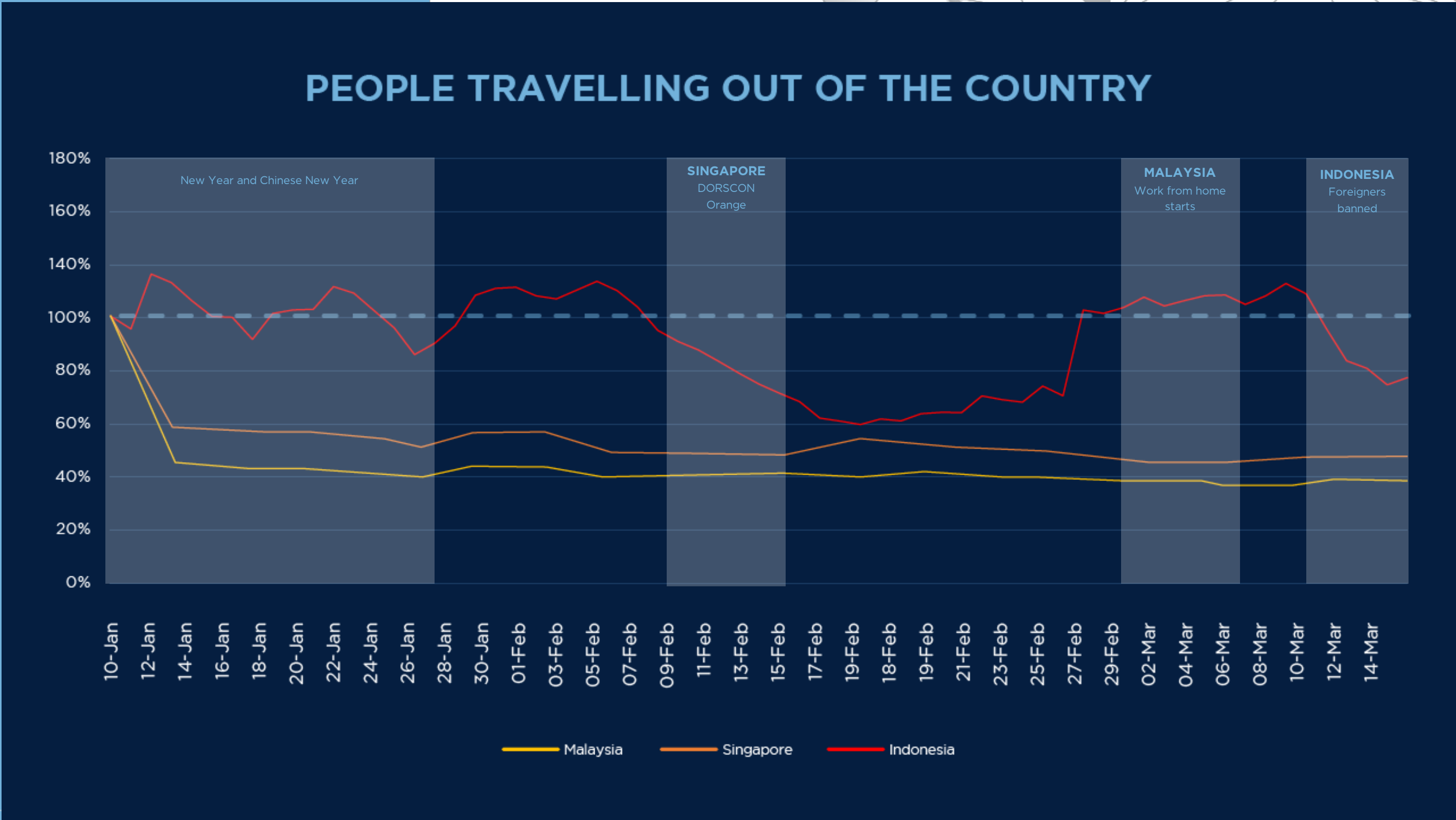
Travel out of Singapore dipped once the DORSCON level was changed to Orange.

In Malaysia, travel dipped as several companies started to implement work from home and travel bans especially after patient 26 (a public figure) tested positive.

Travel dipped in mid-February after heat scanners were installed in airports and again once the government banned foreigners from travelling into the country

**What this means for Ramadan this year**

This means that there will be many who will not be able to return to their hometowns. Those who decide to stay put during the Ramadan period would likely need services like money transfer and conference call systems.





Many will have to stay put, either in the cities or in their hometowns.

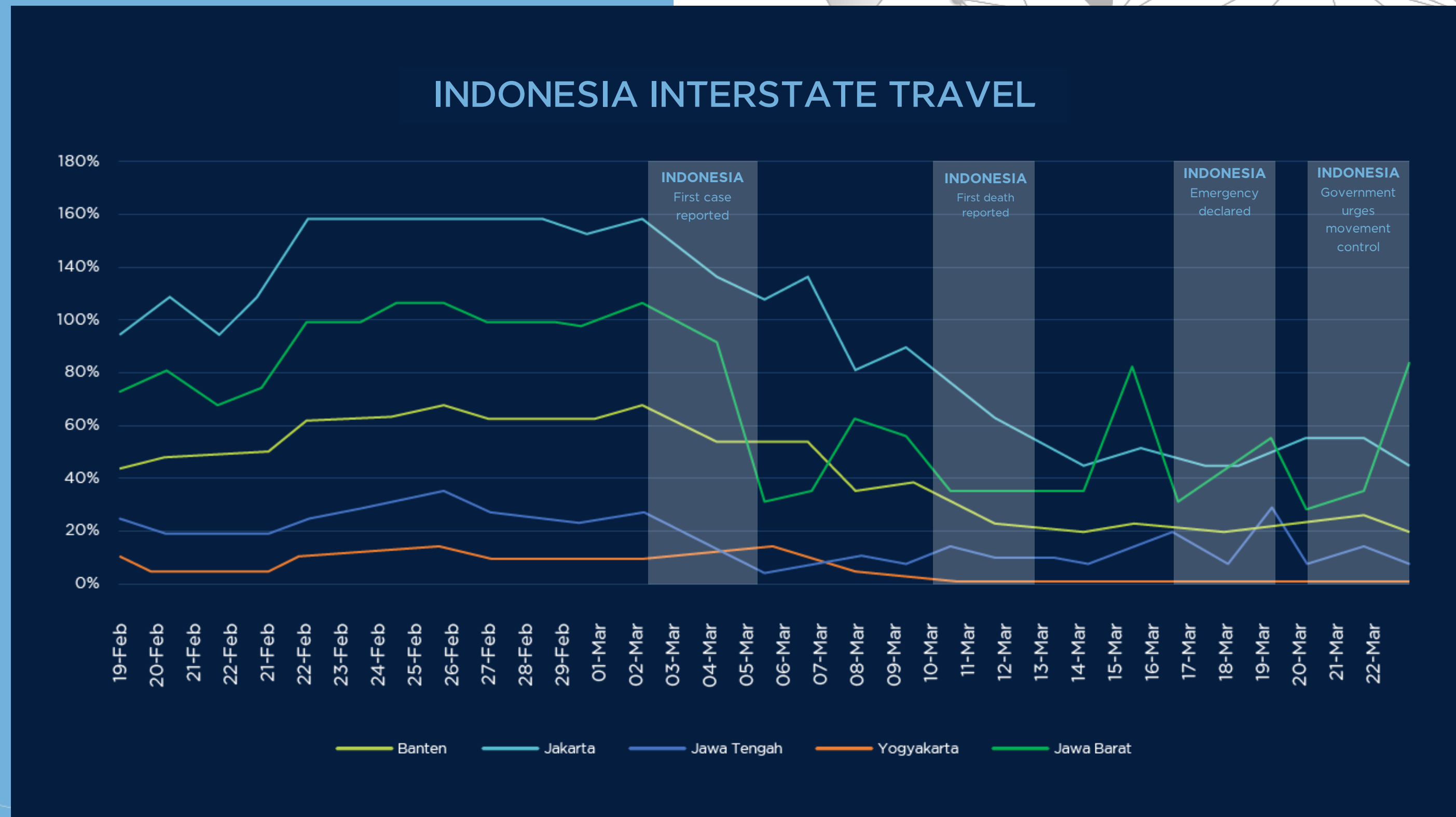
**What we have seen so far**  
Travel interstate has also decreased, triggered by events such as lockdown measures or a rise in reported cases.

However there are also large groups in Malaysia and Indonesia that have returned to their hometowns.

For example in Indonesia, those with lower affluence (stall operators and farmers) are seen returning to Jawa Barat and Jawa Tengah as travel to the city center is steadily declining.

**What this means for Ramadan this year**

This creates two potential target markets for essentials, like groceries for those who need to purchase for smaller households and bulk buy within their hometowns.



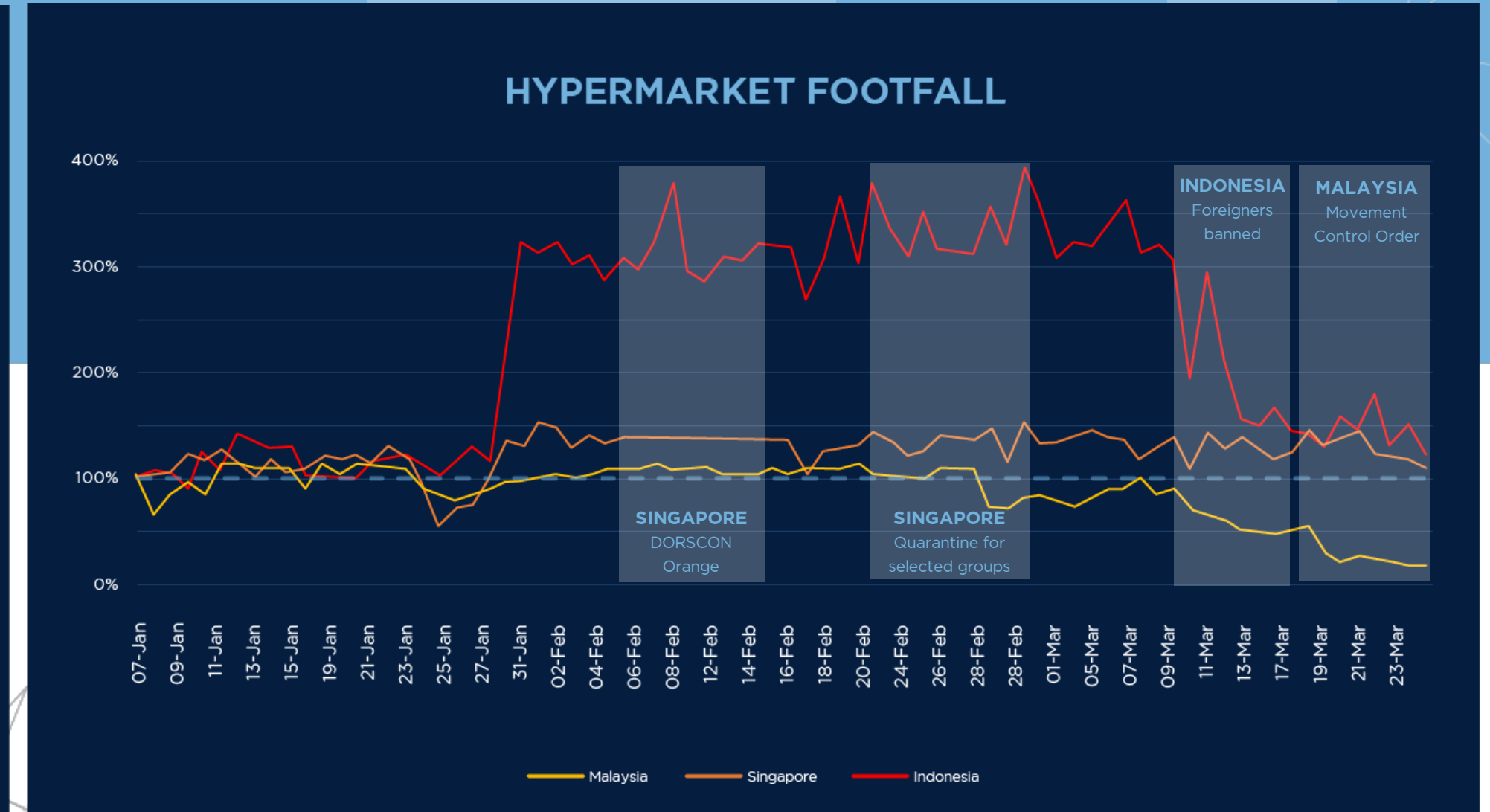
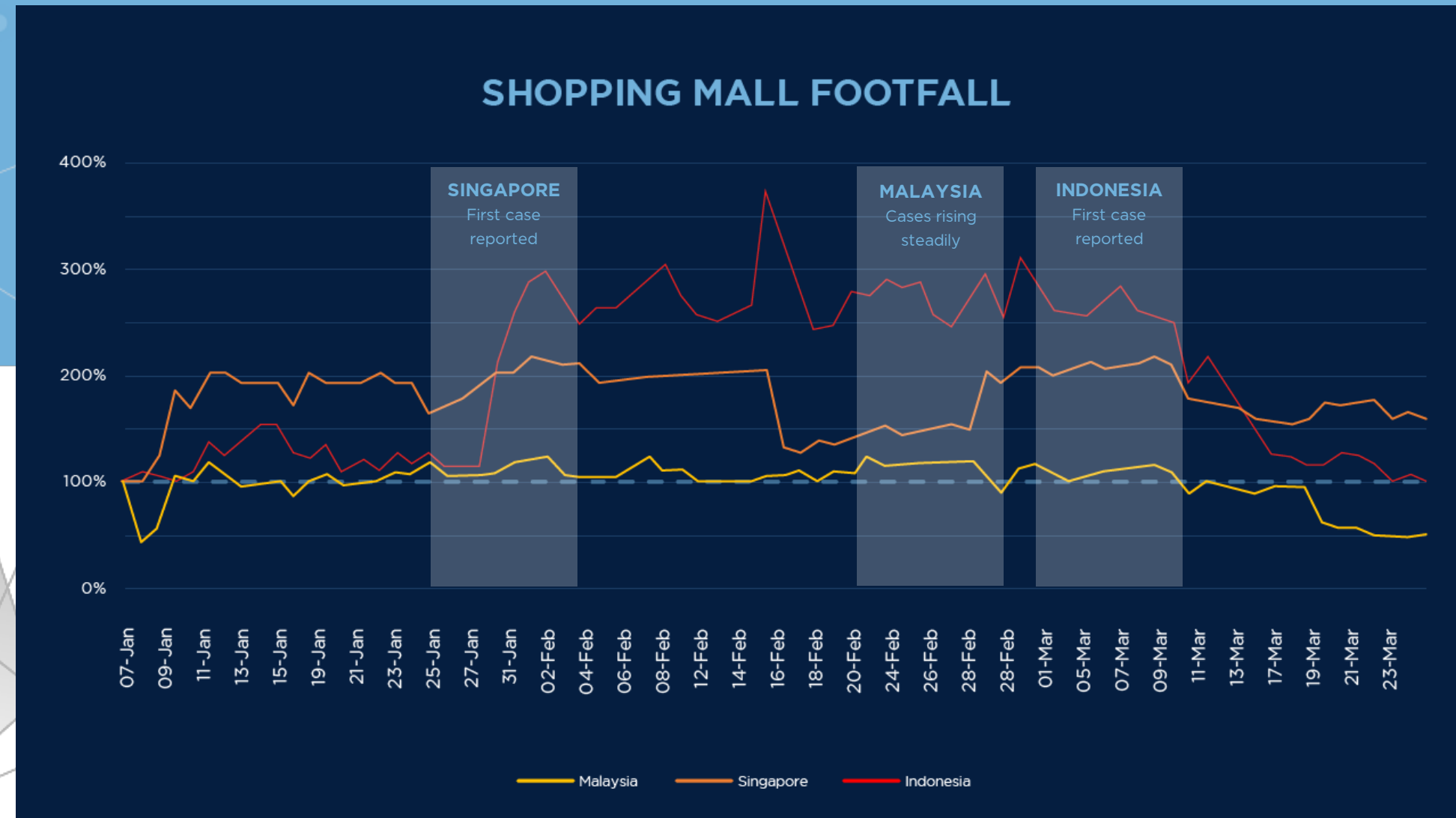


# Shopping habits have changed but not in the way we think

People think that they avoid going out to shop, but data shows physical traffic to shopping malls and hypermarkets continues to increase, despite the rise in cases

Most Southeast Asians believe that they avoid crowded areas to protect themselves, however our data shows that mall footfall didn't decrease. As the number of reported cases grew there was little to no impact to traffic to shopping malls in Malaysia, Singapore, and Indonesia. In fact there were spikes of panic buying especially in hypermarkets shortly after statements were made from governments in each country. Traffic to shopping malls decreased only after social isolation measures were enforced by the government.

Consumers are quick to grow complacent towards the pandemic and eager to get back shopping as usual. This could be a space that e-commerce and other digital shopping experiences could fulfil.





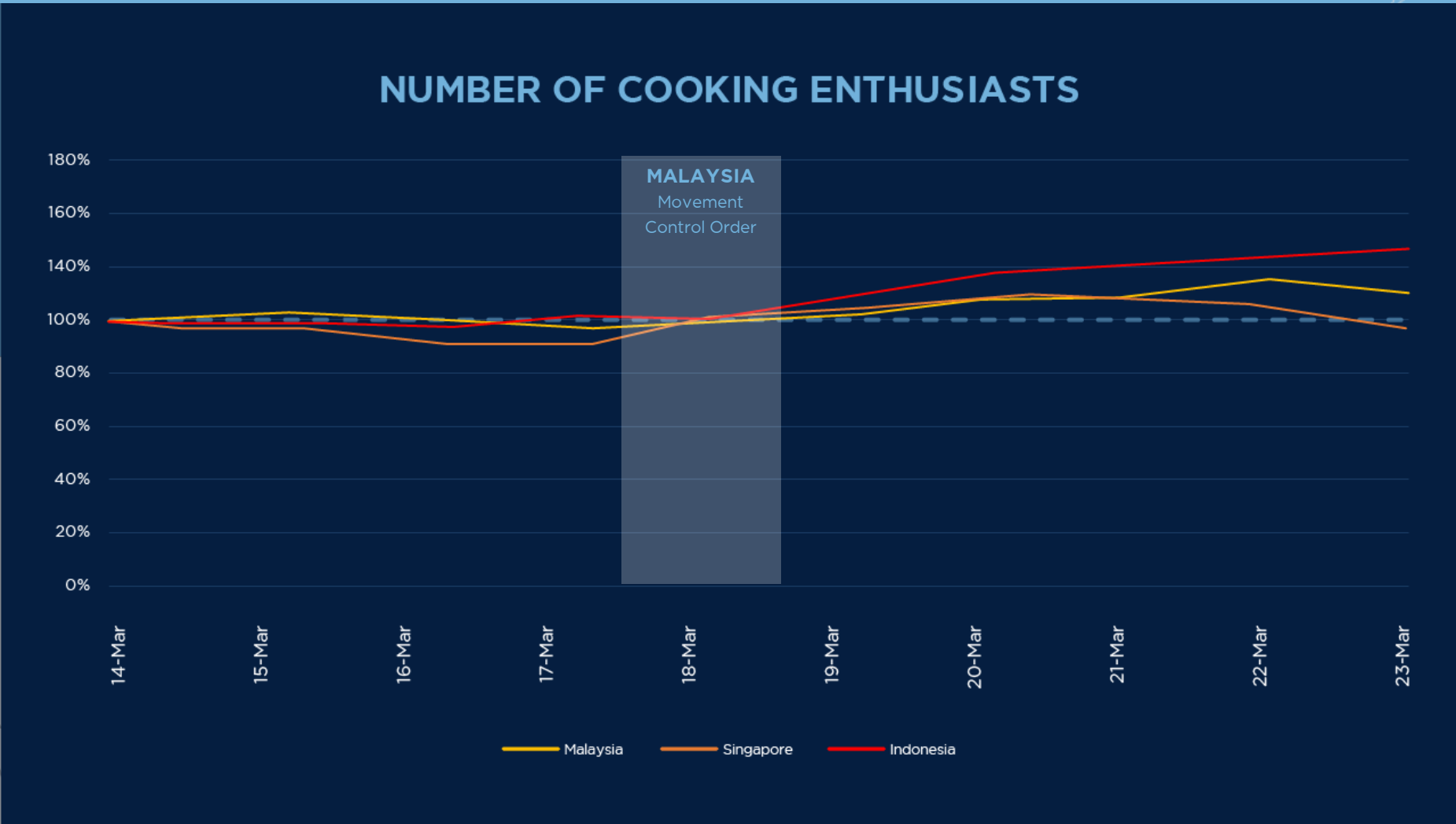
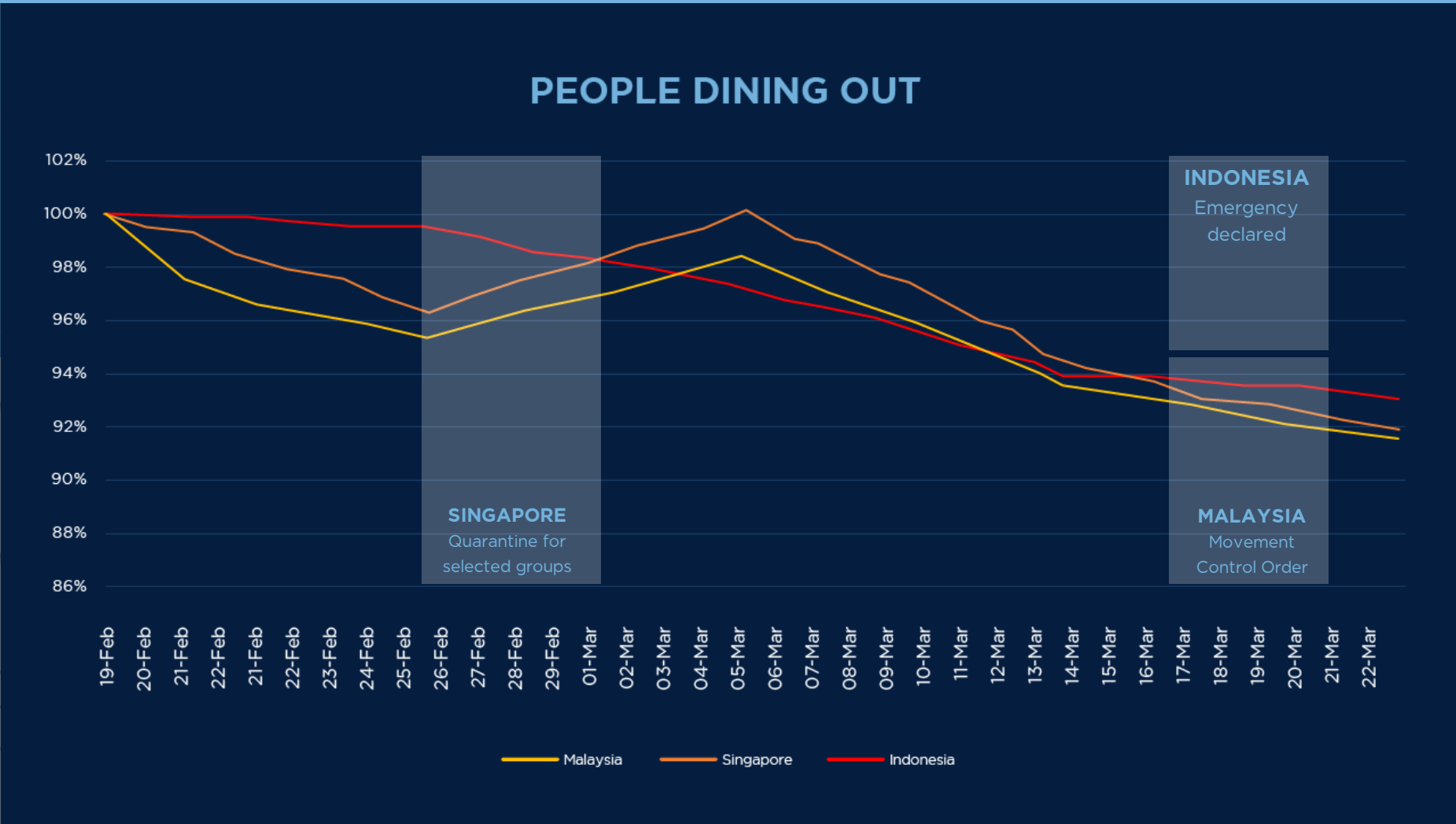
# Our relationship with food will change from dining out to cooking in

Although people have stopped dining out, our enthusiasm for cooking is also decreasing as fatigue sets in, despite an initial peak.

As cases started to increase, more people started to avoid dining out in efforts to practice social distancing. However, in countries like Malaysia and Singapore, people are seen to grow complacent despite the number of rising cases in early March.

Traffic only dipped once governments started implementing social isolation measures. We also see a corresponding increase of interest in cooking as dining out decreases. This is similar to the trends seen last year, however on an extremely accelerated basis.

We expect to see people’s enthusiasm for cooking to plateau eventually as more will start seeking out more convenient alternatives. The situation will become increasingly difficult for Muslims during Ramadan as they will not be able to break fast with family and as governments move to ban Ramadan bazaars. This could create an increased demand for ready-to-cook meals and food delivery services.



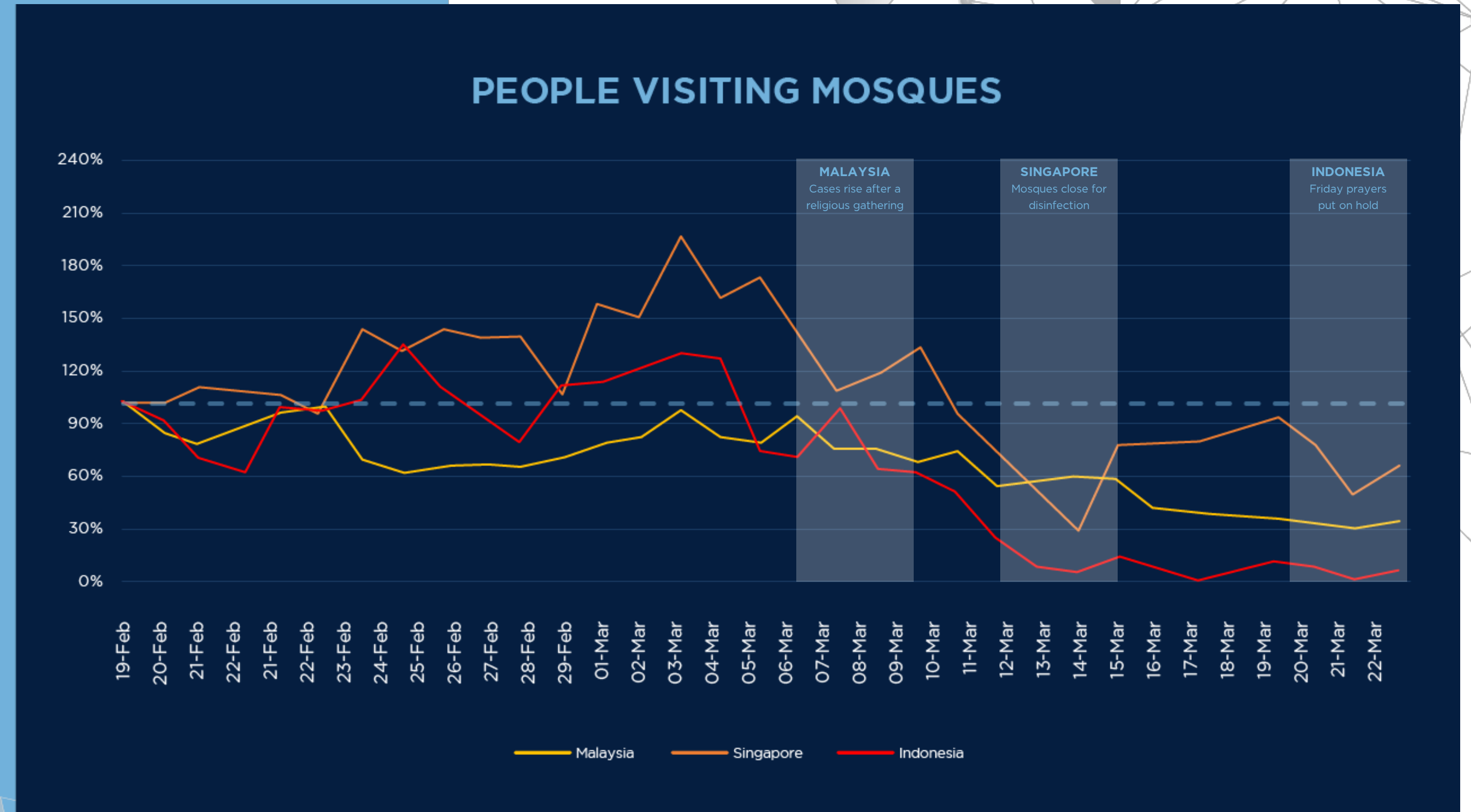


# The way we pray has changed drastically

In our previous [report on Ramadan 2019](#), there was a significant increase in traffic to mosques and prayer rooms in Malaysia, Indonesia, and Bangladesh. However with social distancing measures in place, many countries have moved to ban religious and mass gatherings.

The Indonesian Ulema Council has placed a [fatwa](#) in favour of social distancing. [Singapore](#) and [Malaysian](#) governments have ordered a suspension on all large gatherings, including religious gatherings.

This means more will seek alternative resources such as religious apps.







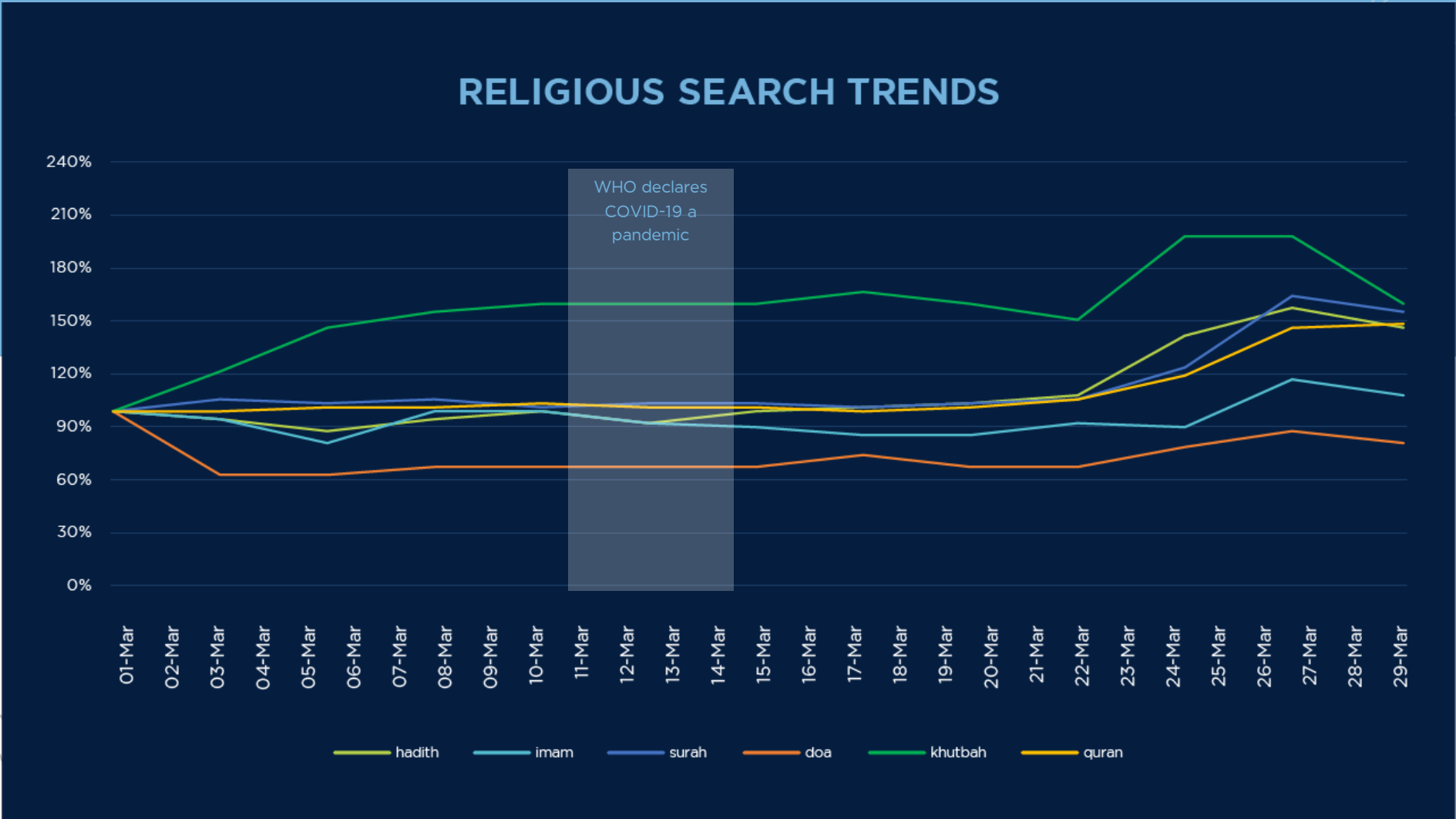
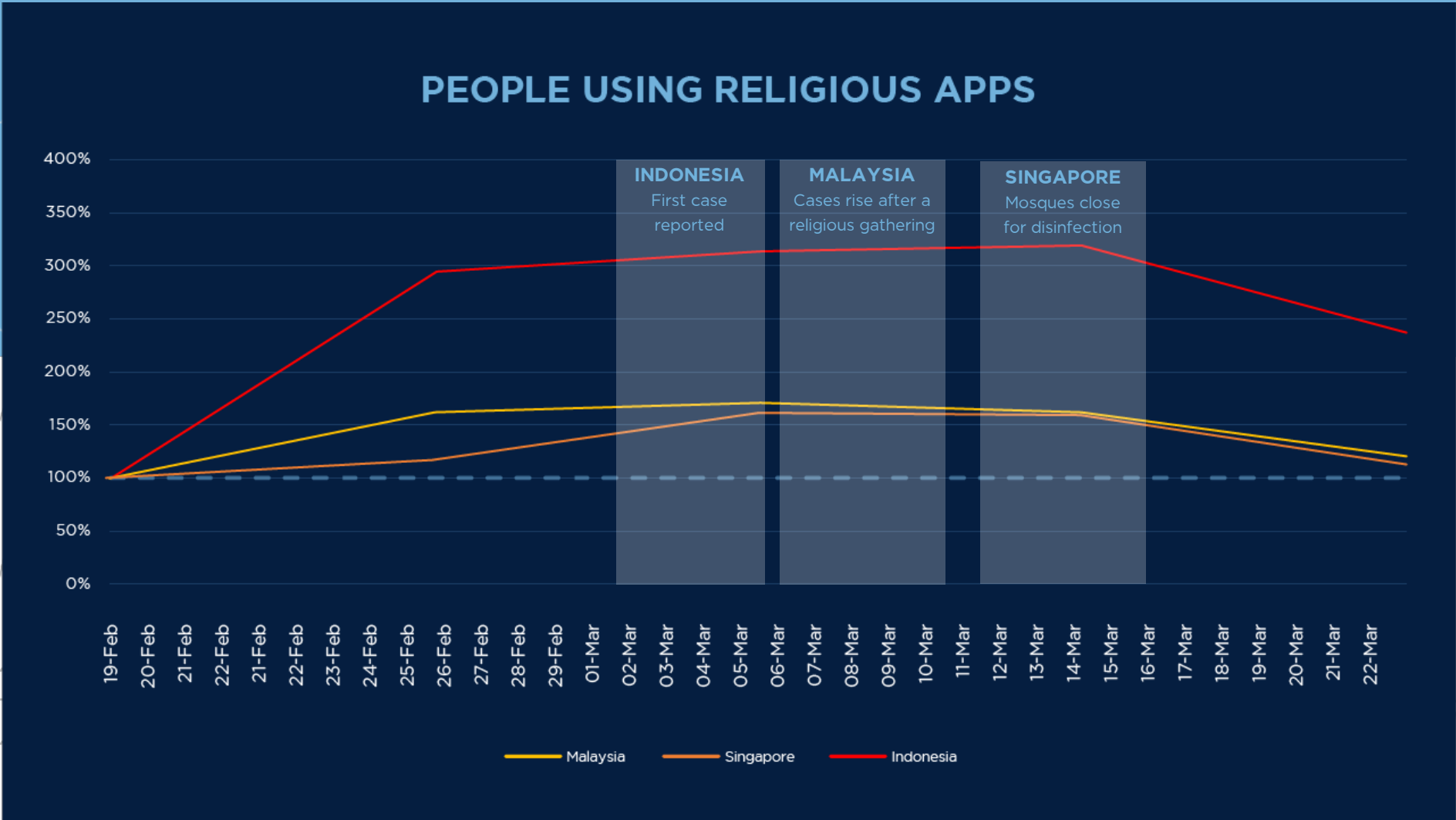
# 2

People will seek out  
online substitutes  
instead

# As places of worship close, people seek resources online instead

As places of worship close to promote social isolation, there is also a correlating increase in the use of religious apps. The use of religious apps tend to spike a week prior to Ramadan.

This year, there is an acceleration as people have started using these apps a whole month before Ramadan. As people tend to turn to religion during times of crisis, search trends for religious resources online also increased. This demonstrates the incredible resilience of Muslims, as they continue to learn, pray, and draw closer to Allah despite the circumstances. This could be a gap for brands to fill by offering learning resources, religious edutainment, and even web conferencing.



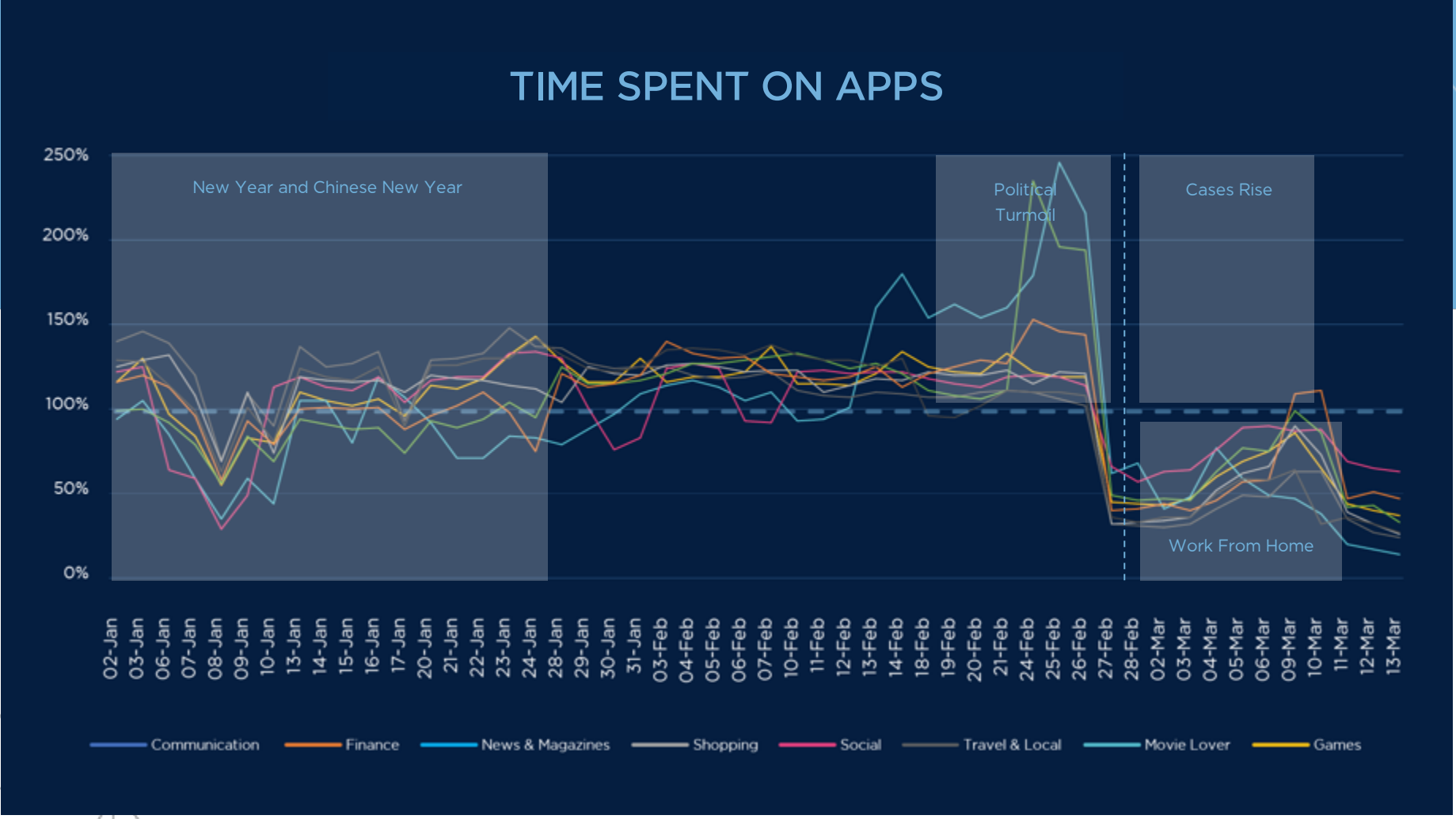
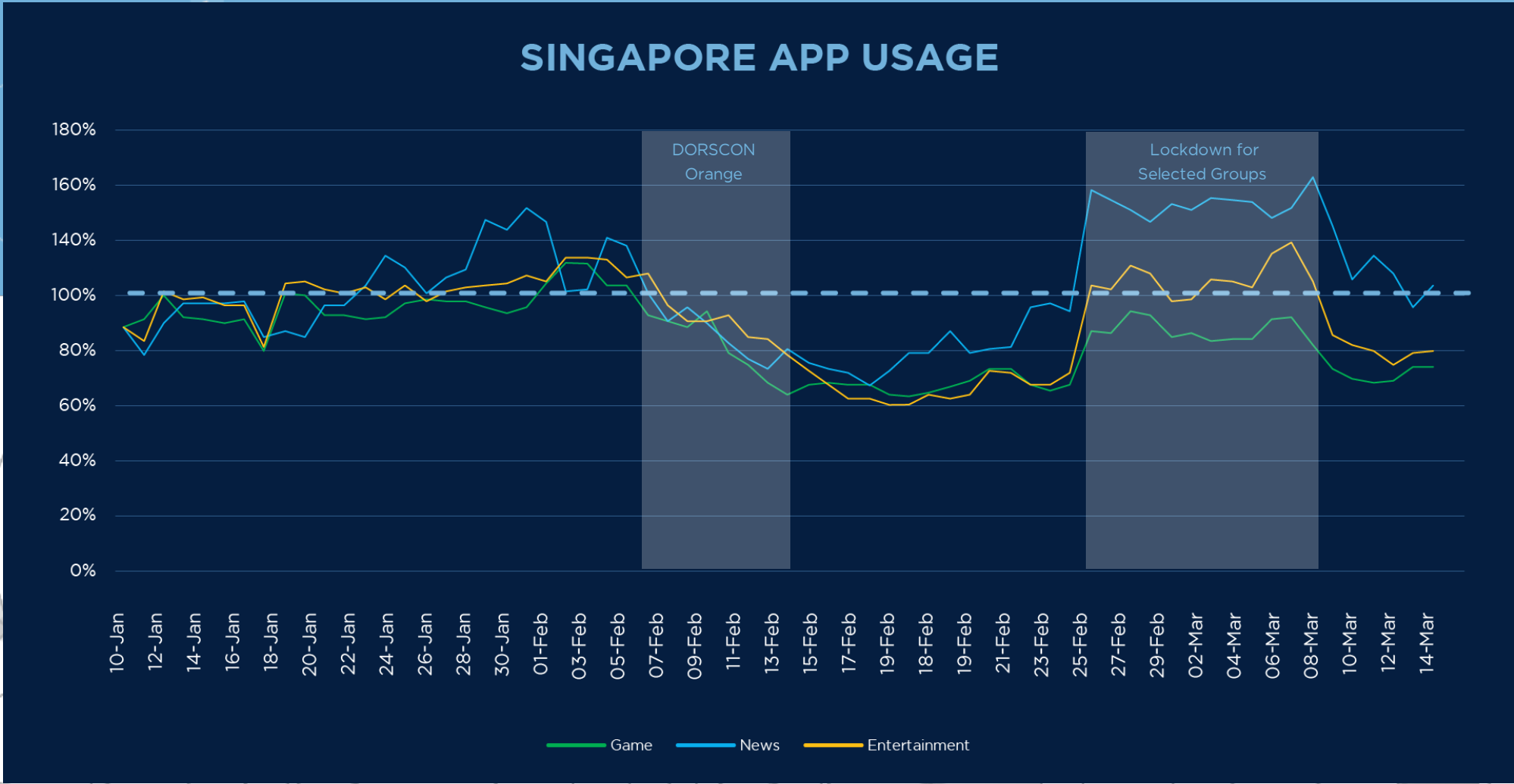
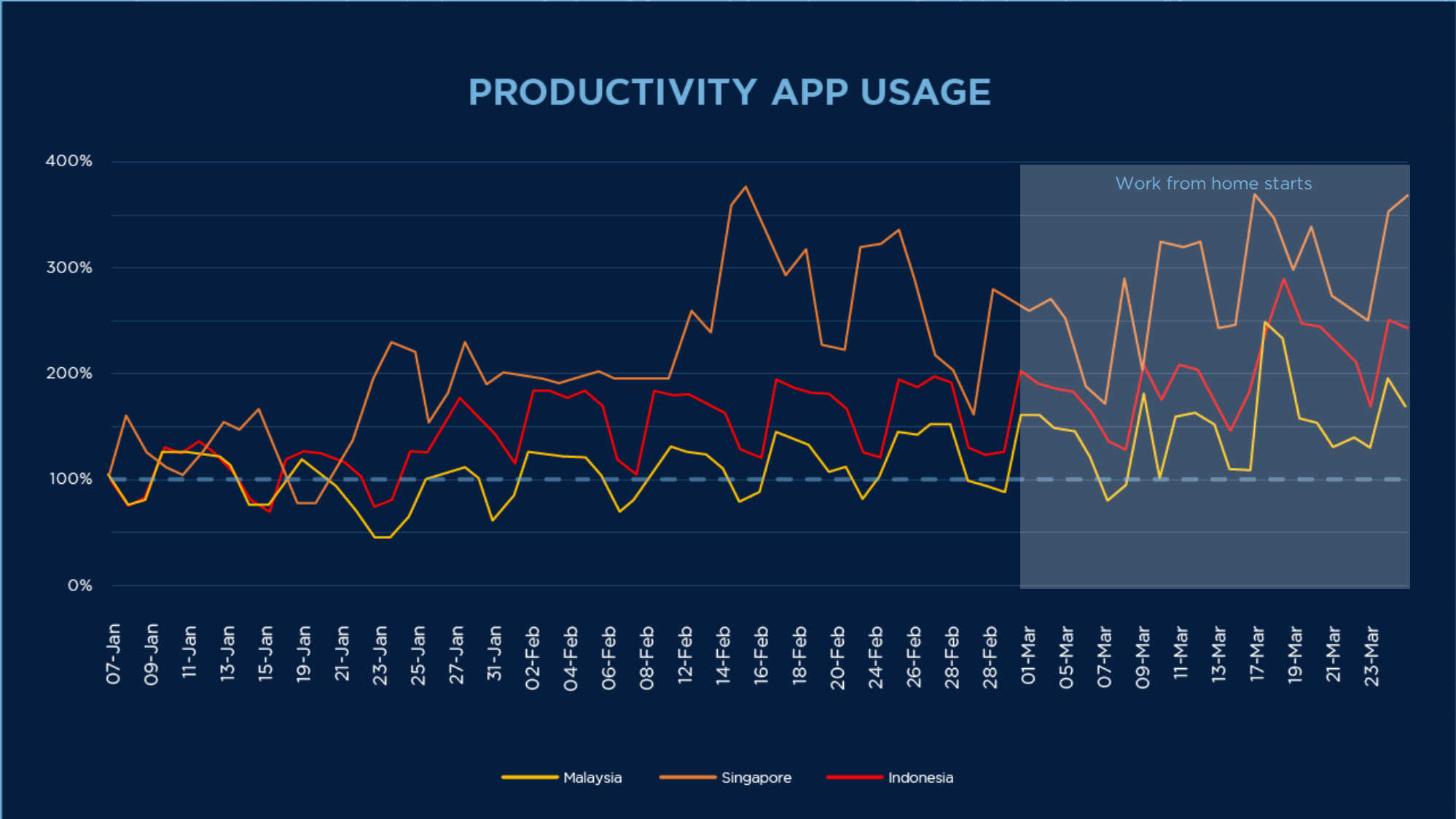


Consumers' digital behaviour has shifted, setting a less celebratory mood for the festive period

People are now more interested in health and fitness as concerns over the virus creates a sense of heightened anxiety. As more start to work from home, interest in productivity apps has increased as time spent on most leisure apps has dropped.

Within leisure apps, the time spent on news apps is significantly higher than that of gaming and entertainment. Now reality beats entertainment.

In short, this festive season, celebrating will be the last thing on their minds.





## INDONESIA – RAMADAN 2019 VS 2020

*As entertainment changes, the people who influence the consumers' minds changes as well*

As production houses shut down across the region, entertainment for the season will change from robust to nearly non-existent.

This means no more Ramadan specific programming and special Eid dramas or episodes.

As we've seen with the app usage, reality now becomes the new form of entertainment and likewise the influencers for the season have also changed accordingly.

Last Ramadan there was naturally more interest in celebrities. This year, the biggest influencers, on the subject of Ramadan, are ministers and government officials.



## MALAYSIA – RAMADAN 2019 VS 2020



## SINGAPORE – RAMADAN 2019 VS 2020







# 3

Data-driven  
marketing strategies  
to capture the “stay-  
at-home” consumer



# 1. Change your perspective with a new consumer lens

Consumers haven't disappeared, they have just changed the way they work, socialise, shop, eat, and practice religion. We took a deep dive into our data to convert specific personas that emerged during this time of crisis. These personas had several distinct behaviours and needs that brands could fulfil.

- *The Bored Homebody* started killing time with entertainment and gaming while staying at home.
- *The Adaptive Shopper* has switched to new ways to procure what they need.
- *The Sad and Confused* shows an overall decrease in activity particularly in entertainment apps.
- *The Social Citizen* seeks information from social and news sources and then reshare what they hear within their social circles.
- *The Brave One* represent front liners and essential industry workers that need to carry on as usual for society to function.

These crisis personas were identified to help brands draw creative insights into the changing consumer behaviour that can help shape your marketing strategy in this very different world.





## 2. Use insights to identify gaps

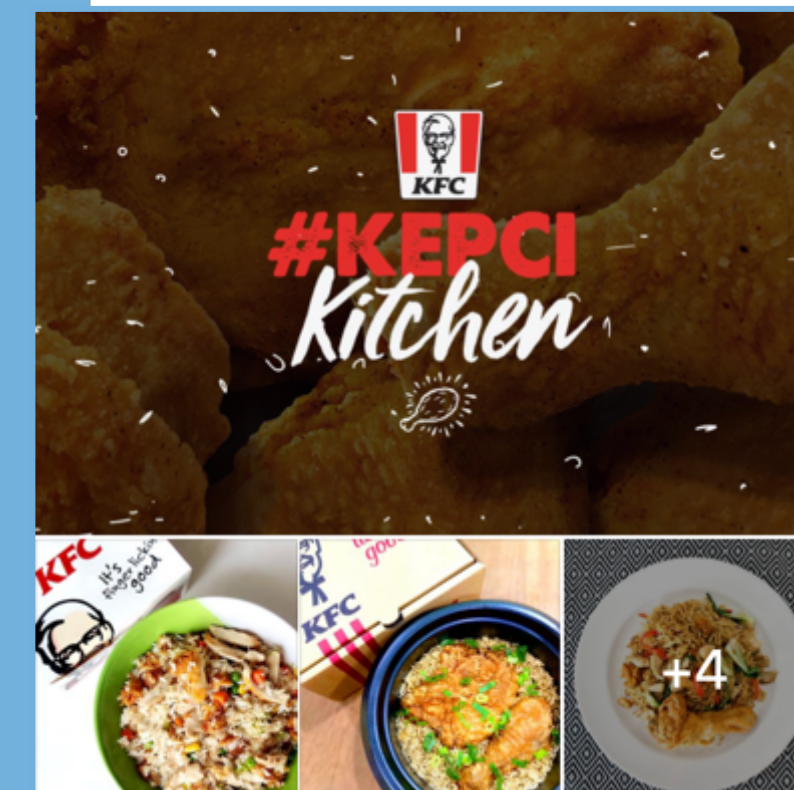
Start with your own data to identify gaps that you can fill and consumer groups that you may not have been able to reach before. This Ramadan, it could be gaps in experiences as people search to recreate social gatherings, the yearning for certain cuisine, the desire to give back, or even the want to purchase gifts for loved ones. Different personas are looking to fill different gaps.

*The Bored Homebody*, for example, would benefit from recreating recipes from KFC's Kepci Kitchen or purchase online classes from Tokopedia while Grab and Geylang's digital bazaar Ramadan can help her get out of the house, virtually.

*The Adaptive Shopper* can benefit from Lazada delivering Cameron Highland's fresh produce to her and help small local sellers with Tokopedia's Orbolan Seller, digital event.

*The Sad & Confused* may potentially be stranded and living alone. Here's where brands like Anomali's Masakan Rumah and Irvin's salted egg rice bowls can help. Meanwhile, TimeOut (which rebranded to TimeIn) can provide suggestions on how this persona can keep entertained with lighthearted suggestions on what to do during this time of social isolation.

Brand pivots like these not only help fill a gap but also help brands stay relevant in a stay at home economy. KFC is now able to speak to home cooks, Irvin's is able to move beyond the snack category while Lazada and Tokopedia are able to expand into selling completely new product categories like fresh produce and e-learning.





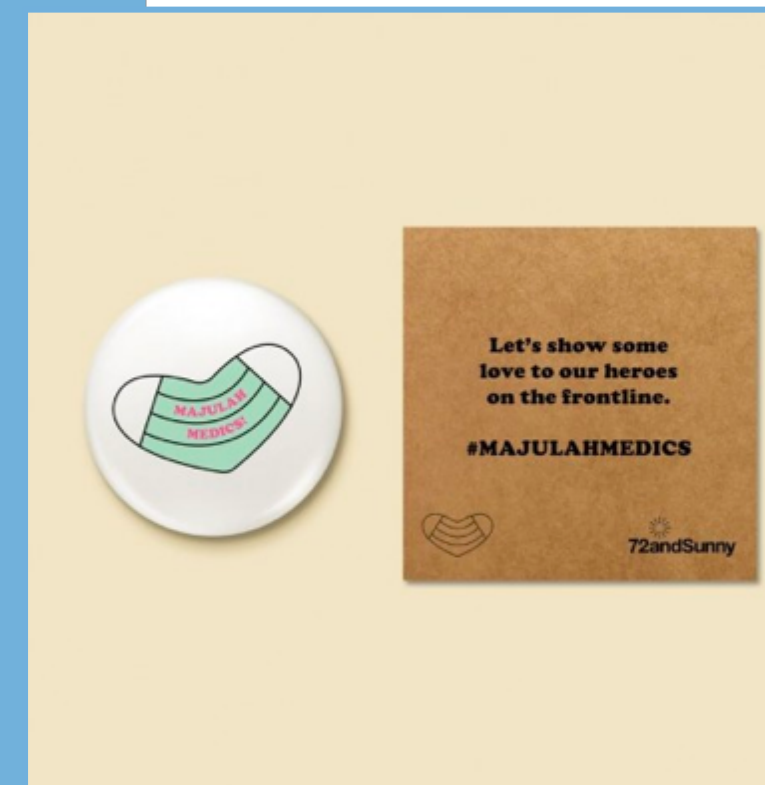
### 3. Overcommunicate – don't leave your consumers in the dark

People are not only seeking worldwide information about COVID-19 but there is also a need for updates specific to their own context.

*The Social Citizen* would be on the lookout for content like the online sessions from Singapore mosques with specific commentaries on COVID-19; Quran recital sessions on Facebook with Zayan radio station; and specific stay at home animation with Indonesia's Nussa.

57% of Southeast Asians are now experiencing high to extremely high levels of fear. This is forcing brands to pivot from the usual celebratory messaging of the festive season. As social distancing becomes the new norm, brands need to change the way they celebrate the togetherness aspect of Ramadan. Instead, brands should lean into their brand ideals and win the hearts of consumers.

*The Brave Ones* would benefit from fashion designers creating garments for healthcare workers in Indonesia or the Biji-Biji Initiative creating PVC face shields in Malaysia or Singapore's 72andSunny discount badges for healthcare workers. However, efforts like these also have a spillover effect with *The Social Citizen* as well.





Ramadan 2020, represents a time of unprecedented challenge for consumers and businesses alike. But it also has shown us that consumers are adaptive and with the right data-driven strategies, brands can still be part of this new world's narrative.

ADA's powerful Data Management Platform (DMP), *XACT*, steps in with anonymous mobile-first data that is captured from 375 million unique devices and 400,000 unique apps.

Learn more about the [ADA Data Story](#) and how our data scientists and engineers can help accelerate your business growth.



**375M**  
**UNIQUE**  
**PROFILES**



**>200**  
**RAW & DERIVED**  
**ATTRIBUTES**



#### TELCO / DEVICE

- Carrier
- Major OS
- Device Category / Model
- Connection Type (Wi-Fi)



#### TARGETING

- Country
- State / City
- Zip Code
- Latitude / Longitude
- Geohash



#### BEHAVIOUR

- Air Travellers
- Shoppers
- Bus / Metro Users
- Gamers
- Country Club Member



#### DEMOGRAPHICS

- Gender
- Age
- Average Income
- Ethnicity
- Religion



#### LOCATION

- Home Location
- Work Location
- Point of Interest



#### PROCLIVITY

- Business Travellers
- Bargain Shoppers
- Auto Buying Intenders
- ... many more



#### PROPNESITY

- 3G / 4G Device Consumers
- Dual SIM Phone Users
- ... many more



# Hypertargeting with our Ground Breaking Crisis Personas

The COVID-19 pandemic has forced lifestyle changes on all of us. Although Southeast Asians are confining themselves at home, our data shows that this hasn't restrained most from their daily activities. Physical habits are now simply becoming digital habits.

Southeast Asians have adapted their digital footprint to cope with their present and foreseeable future challenges. Simply put, your consumers haven't disappeared, they've merely adopted a different persona, each with different needs.

Formulated by data experts using XACT, our proprietary data management platform with over 375 million datasets, these personas represent insights drawn from actual digital footprint and not just creative hunches.

[Request A Demo](#)





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