

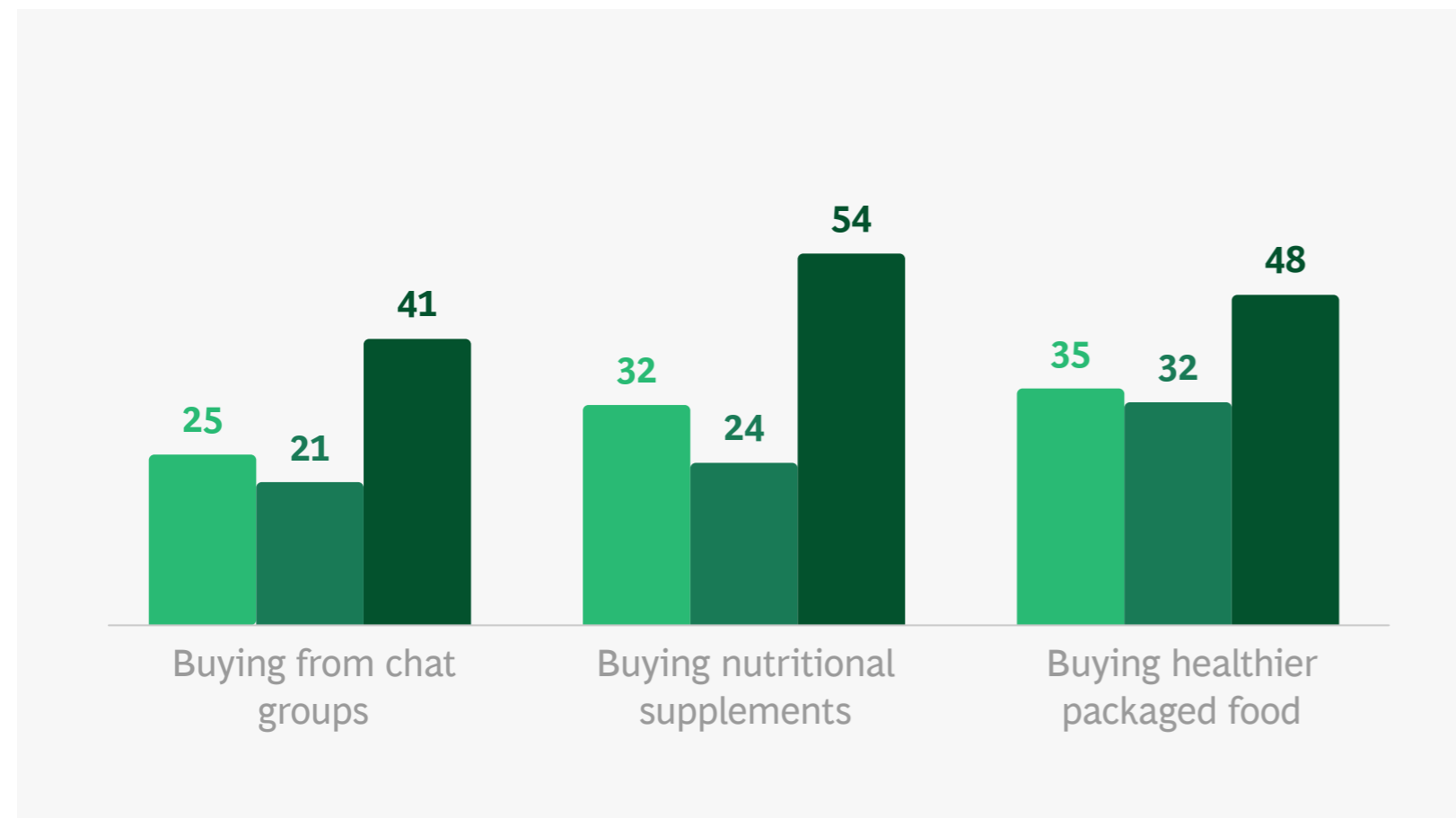


# The Consumer Sentiment Series

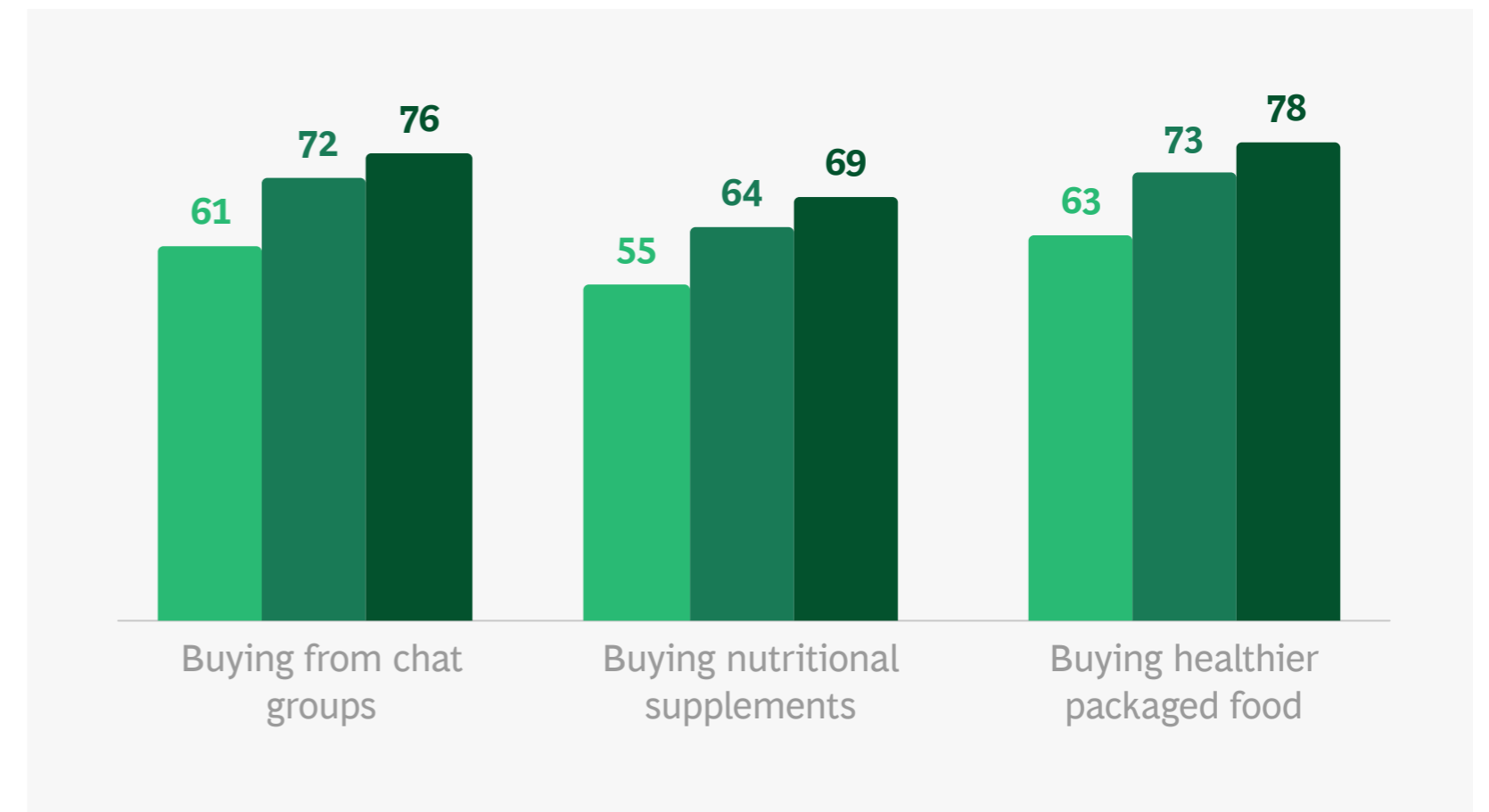
India Deep Dive

# Some Changes in Indian Consumers' Behavior, Such as Use of Social Commerce and Choice of Healthier Foods, Are Still Accelerating

Percentage increase in number of users during each pandemic stage vs. pre-COVID-19 levels (%)



Percentage of pre-COVID-19 users who engaged in a given activity more often during the pandemic than before it (%)

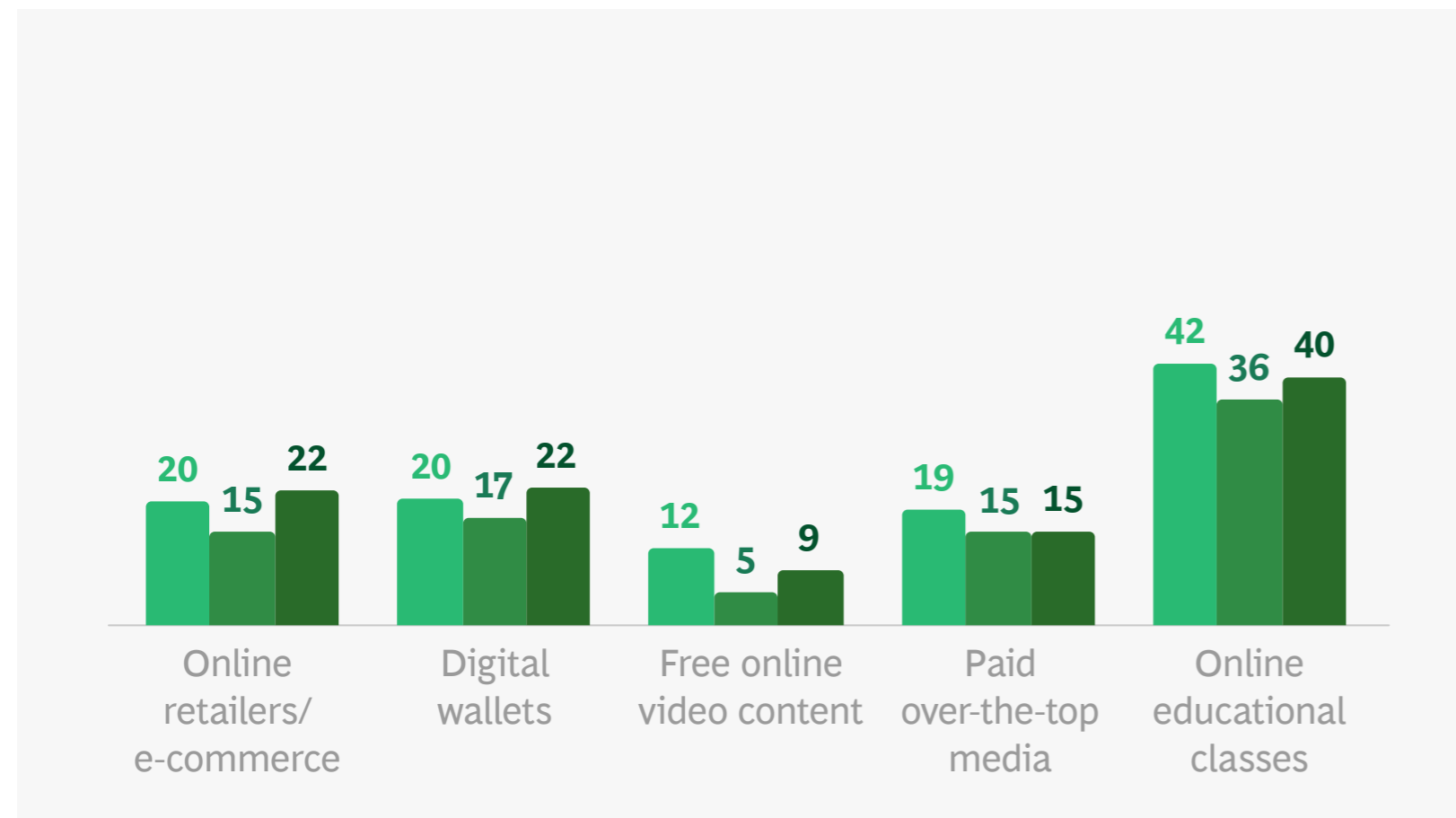


- COVID-19 wave 1: March–September 2020
- Cooling off: October 2020–March 2021
- COVID-19 wave 2: April 2021 onward

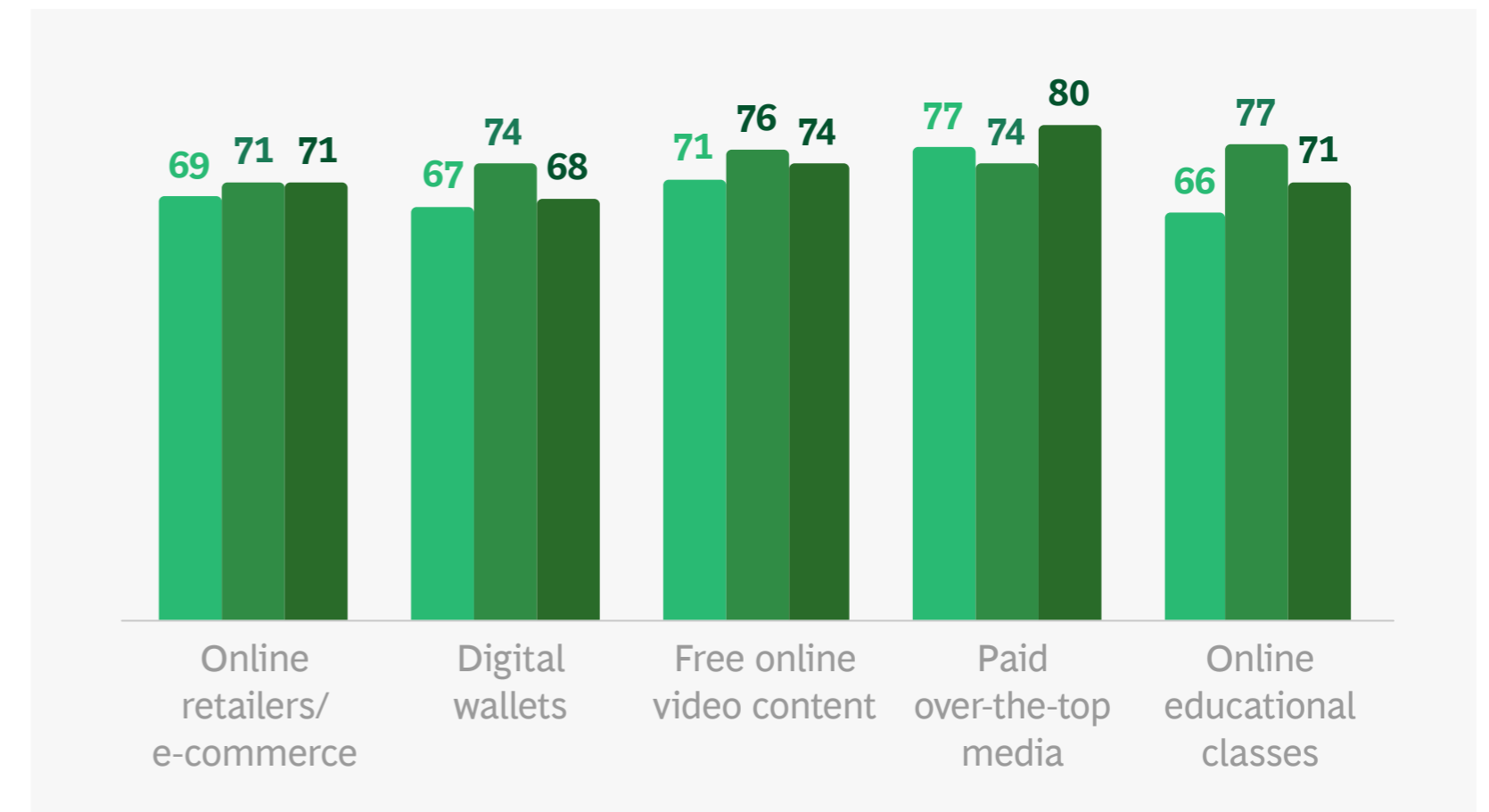
Source: BCG COVID-19 Consumer Sentiment Survey, May 23–28, 2021 (N = 4,000).  
Note: Survey results are representative of ~100 Indian cities with populations of more than 500,000.

# Digital Commerce, Payments, Entertainment, and Education Are Enjoying Sustained Momentum in India During the Pandemic

Percentage increase in number of users during each pandemic stage vs. pre-COVID-19 levels (%)



Percentage of pre-COVID-19 users who engaged in a given activity more often during the pandemic than before it (%)



- COVID-19 wave 1: March–September 2020
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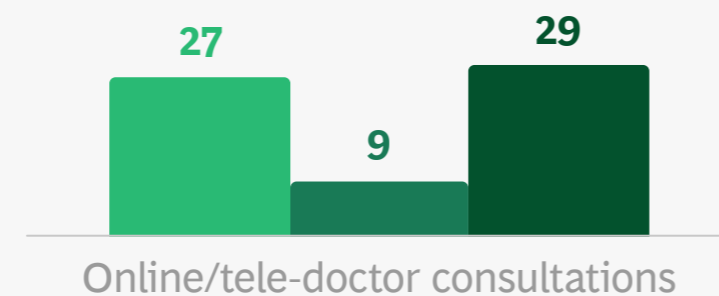
Source: BCG COVID-19 Consumer Sentiment Survey, May 23–28, 2021 (N = 4,000).  
 Note: Survey results are representative of ~100 Indian cities with populations of more than 500,000.

# Behavioral Changes Such as Shopping at Modern Retail Outlets and Relying on Online Health Consultations Fluctuate with the Pandemic's Intensity

**Decrease** in Indian users vs. pre-COVID-19 levels (%)



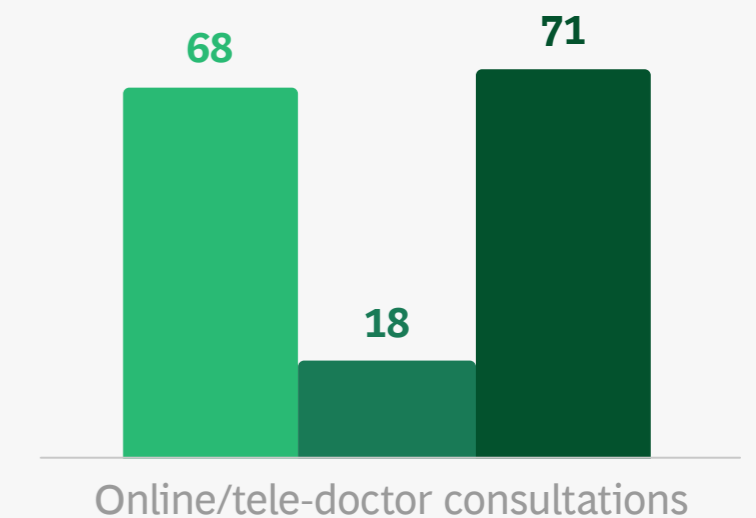
**Increase** in Indian users vs. pre-COVID-19 levels (%)



Pre-COVID-19 users who **decreased** their frequency of use during COVID-19 (%)



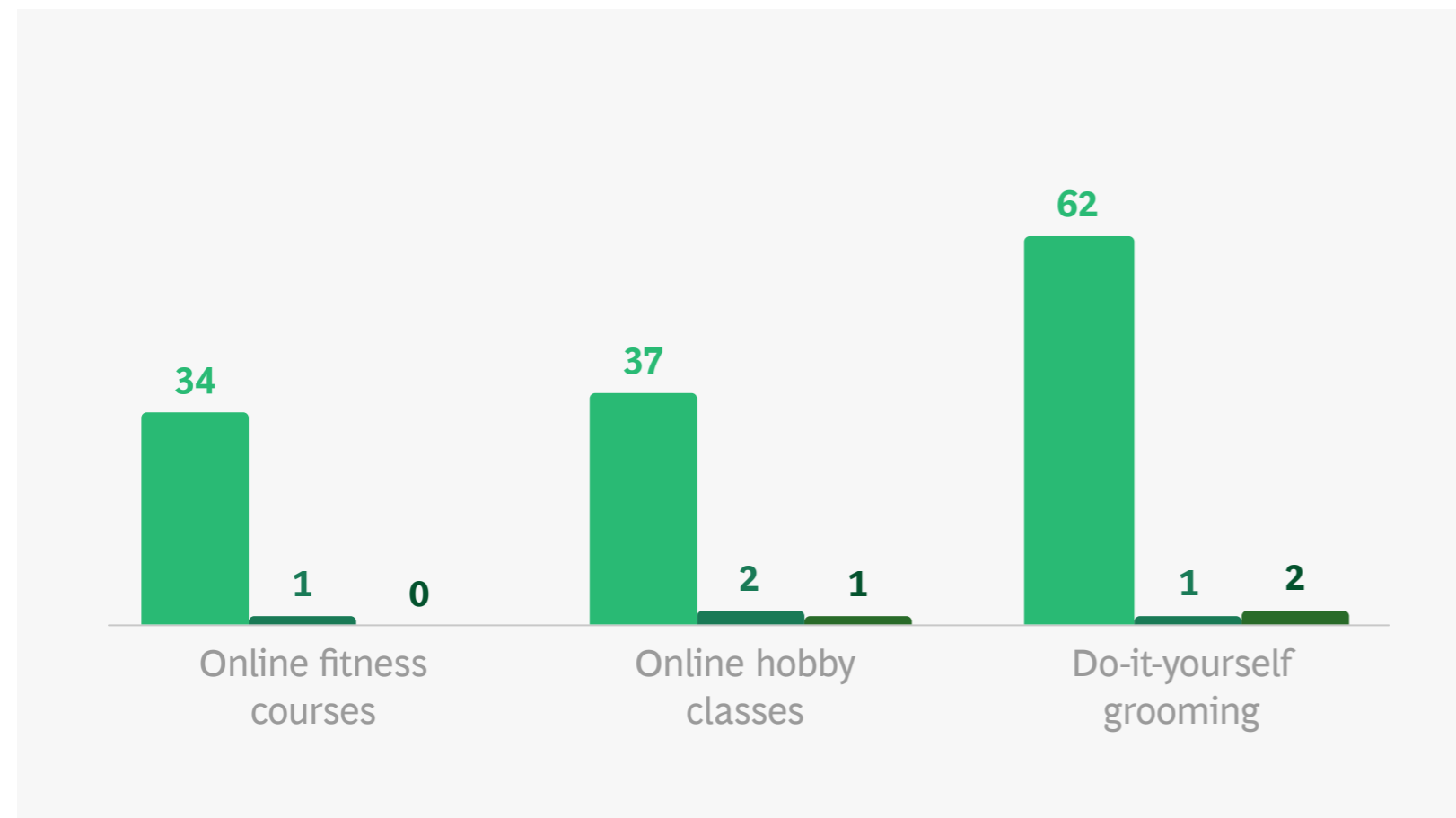
Pre-COVID-19 users who **increased** their frequency of use during COVID-19 (%)



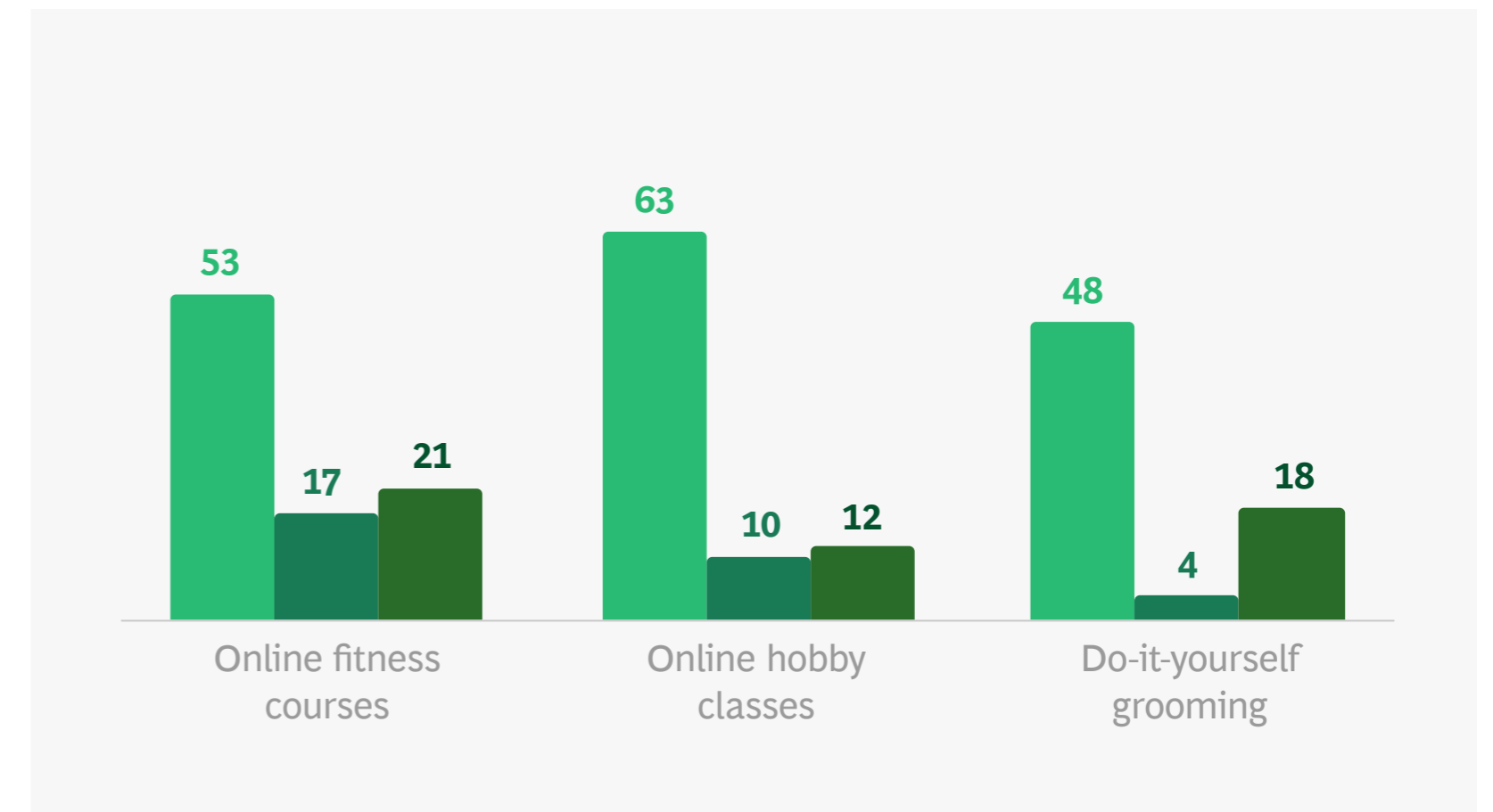
- COVID-19 wave 1: March–September 2020
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- COVID-19 wave 2: April 2021 onward

# As the Novelty Wears Off, the Popularity of Online Fitness, Hobby Classes, and Do-It-Yourself Grooming Has Diminished

Percentage increase in number of users during each pandemic stage vs. pre-COVID-19 levels (%)



Percentage of pre-COVID-19 users who engaged in a given activity more often during the pandemic than before it (%)



- COVID-19 wave 1: March–September 2020
- Cooling off: October 2020–March 2021
- COVID-19 wave 2: April 2021 onward

Source: BCG COVID-19 Consumer Sentiment Survey, May 23–28, 2021 (N = 4,000).  
Note: Survey results are representative of ~100 Indian cities with populations of more than 500,000.