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 (%)

- Buying from chat groups: COVID-19 wave 1: 25%, Cooling off: 21%, COVID-19 wave 2: 41%
- Buying nutritional supplements: COVID-19 wave 1: 32%, Cooling off: 24%, COVID-19 wave 2: 54%
- Buying healthier packaged food: COVID-19 wave 1: 35%, Cooling off: 32%, COVID-19 wave 2: 48%

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

- Buying from chat groups: COVID-19 wave 1: 61%, Cooling off: 55%, COVID-19 wave 2: 72%
- Buying nutritional supplements: COVID-19 wave 1: 72%, Cooling off: 64%, COVID-19 wave 2: 76%
- Buying healthier packaged food: COVID-19 wave 1: 63%, Cooling off: 69%, COVID-19 wave 2: 73%

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 (%)

- Online retailers/e-commerce: 20, 15, 22
- Digital wallets: 20, 17, 22
- Free online video content: 12, 5, 9
- Paid over-the-top media: 19, 15, 15
- Online educational classes: 42, 36, 40

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

- Online retailers/e-commerce: 69, 71, 71
- Digital wallets: 67, 74, 68
- Free online video content: 71, 76, 74
- Paid over-the-top media: 77, 74, 80
- Online educational classes: 66, 77, 71

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

<table>
<thead>
<tr>
<th></th>
<th>Decrease in Indian users vs. pre-COVID-19 levels (%)</th>
<th>Increase in Indian users vs. pre-COVID-19 levels (%)</th>
<th>Pre-COVID-19 users who decreased their frequency of use during COVID-19 (%)</th>
<th>Pre-COVID-19 users who increased their frequency of use during COVID-19 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modern trade retail</td>
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<td>14</td>
<td>72</td>
<td>45</td>
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<tr>
<td>Online/tele-doctor consultations</td>
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<td>9</td>
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</tbody>
</table>

Note: Survey results are representative of ~100 Indian cities with populations of more than 500,000.
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 (%)

<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Online fitness courses</td>
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<tr>
<td>Online hobby classes</td>
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<td>1</td>
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<tr>
<td>Do-it-yourself grooming</td>
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<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

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

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Note: Survey results are representative of ~100 Indian cities with populations of more than 500,000.