

CHECK BREAKDOWN: GROCERY DELIVERY AND ECOMMERCE TRENDS**Grocery Shopping Trends**

- Consumers have increased their grocery and household item shopping frequency and continue to be more likely to feel they are spending more on grocery than less (compared to a year ago).

Online Grocery

- Grocery shoppers are increasingly likely to say they use online grocery delivery.
- Over the course of the pandemic, the percentage who said they use in-person venues like supermarkets or local vendors/markets declined. That trend moderated a bit in our July wave with slight upticks for in-person venues this quarter.
- The feedback isn't negative toward any of the grocery shopping options that we test in our survey – but the feedback is clearly most positive for delivery of online grocery.

Online Grocery

- Consumers who have tried online grocery have report that it was an unequivocally positive experience.
- Online grocery users continue to expect to increase their usage of online grocery delivery going forward.

Online Grocery Competitive Dynamics

- Feedback around online grocery has improved for Amazon Prime Now and Grofers and has softened for Big Basket.

eCommerce

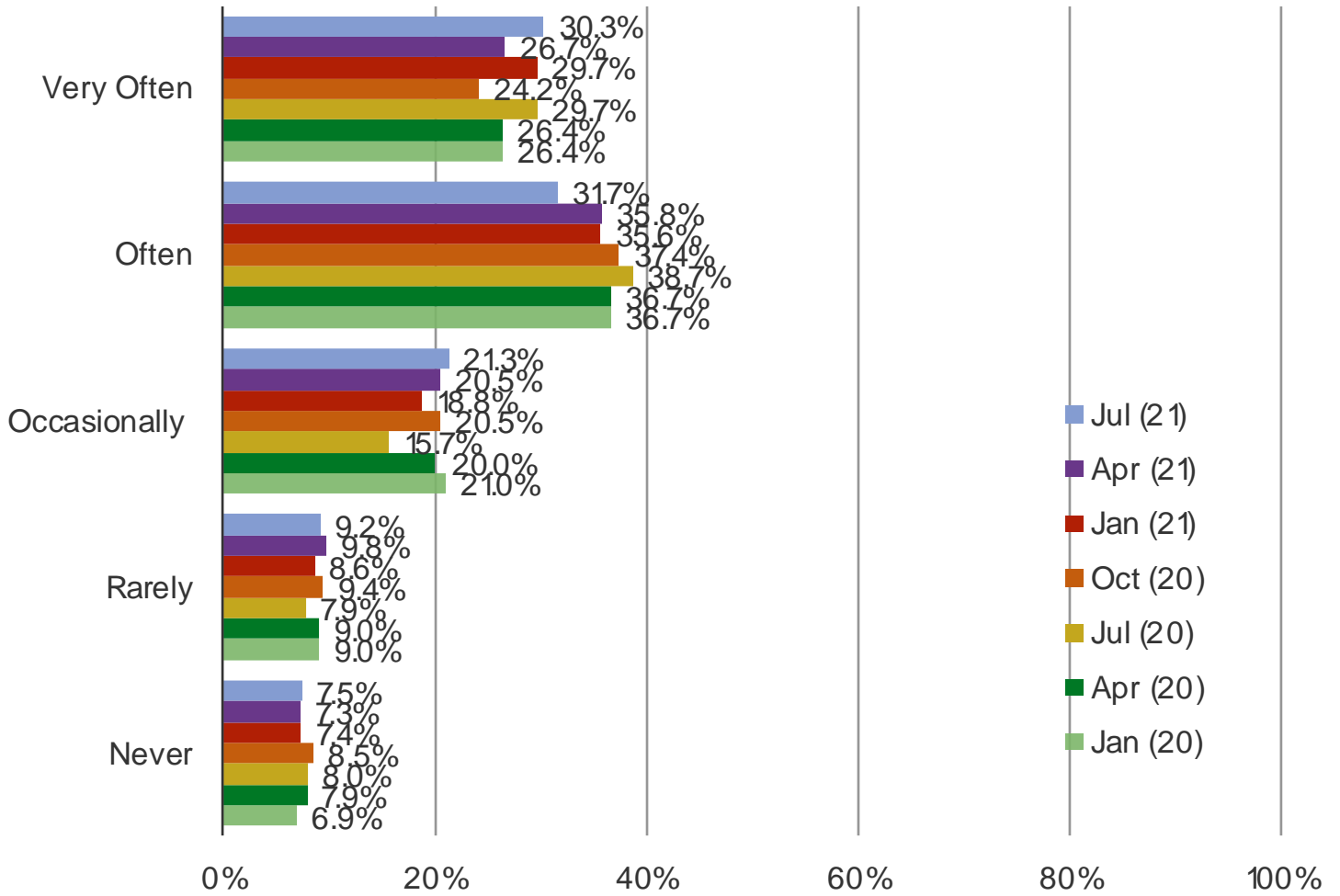
- Feedback was positive/constructive and generally consistent with prior waves for both Amazon and Flipkart.
- Snapdeal and Jabong show some sequential softening in shopping engagement among the broader audience.

India Grocery

INDIA GROCERY

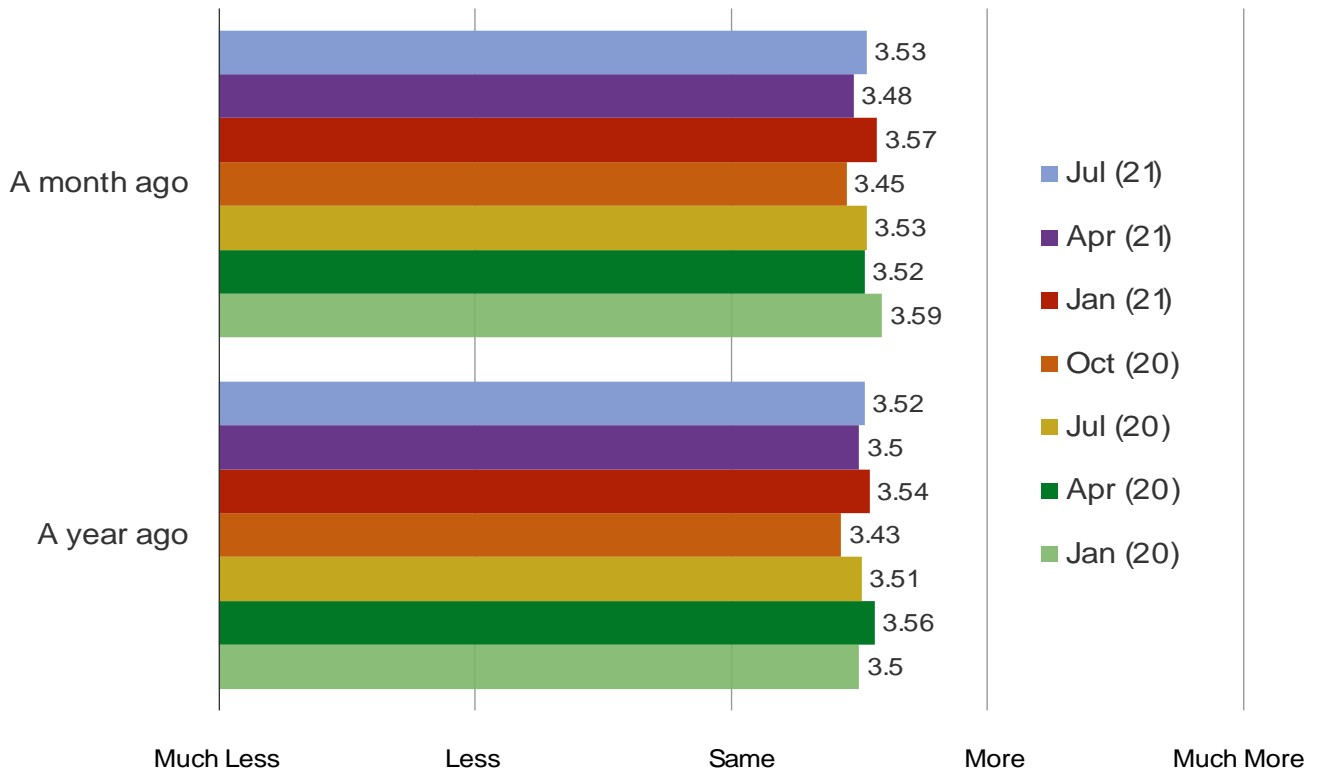
HOW OFTEN DO YOU BUY GROCERY AND HOUSEHOLD ITEMS?

Posed to all respondents.



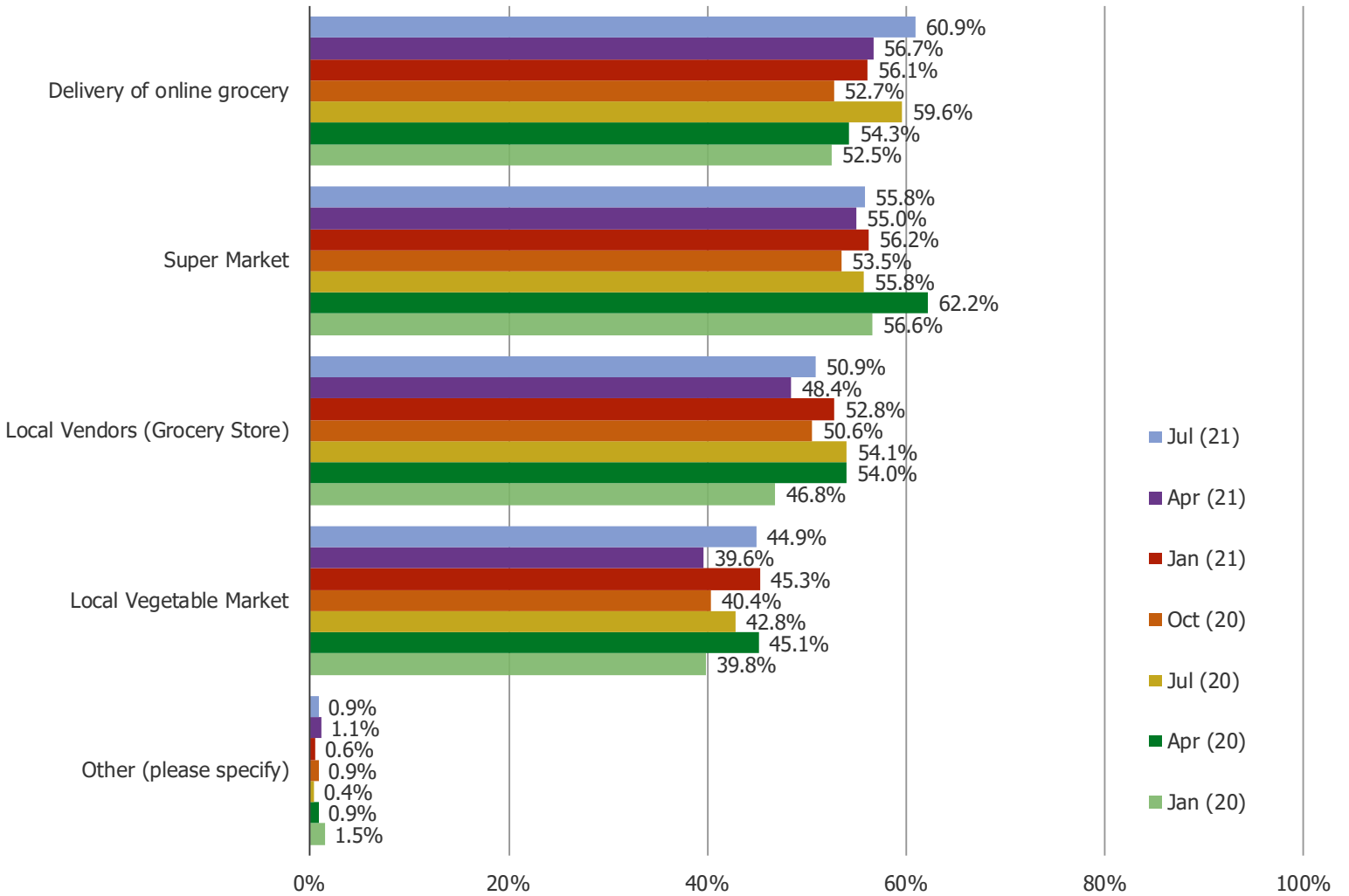
DO YOU THINK YOU ARE CURRENTLY SPENDING MORE ON GROCERY THAN THE FOLLOWING?

Posed to respondents who shop for groceries.



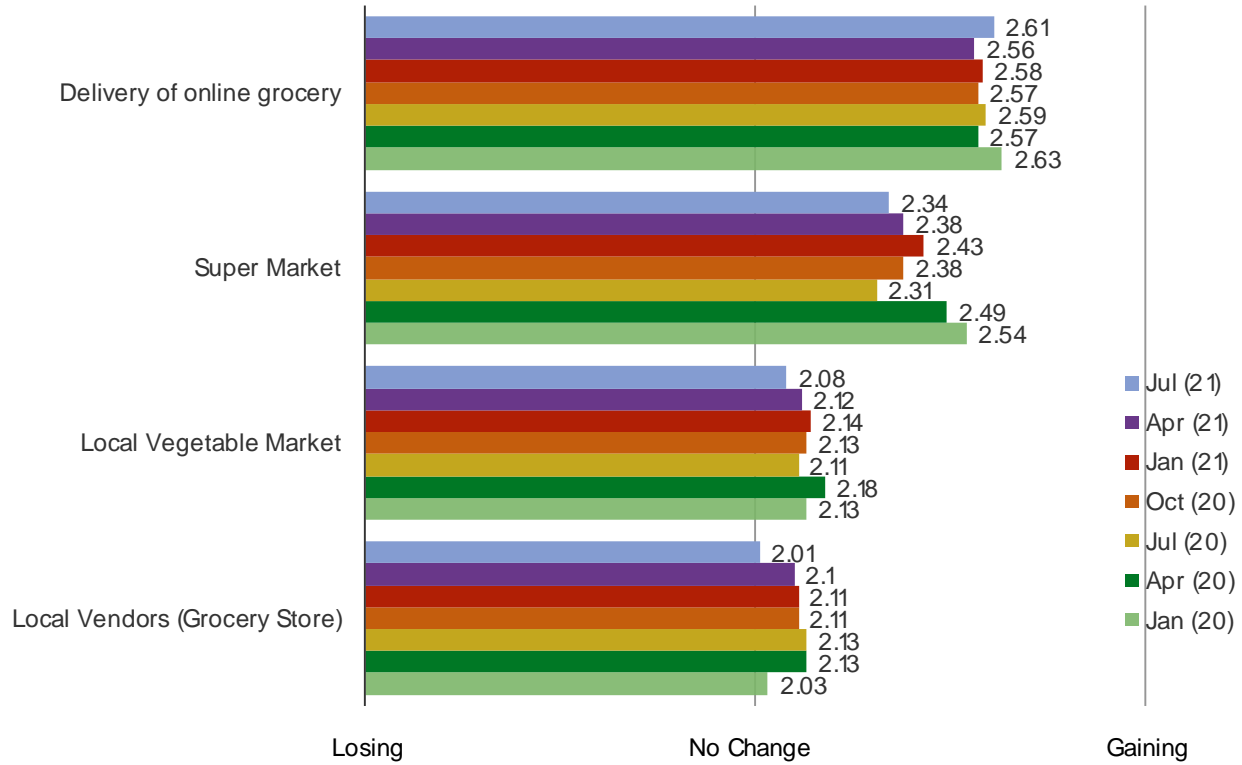
WHERE DO YOU USUALLY BUY GROCERIES? (SELECT ALL THAT APPLY)

Posed to respondents who shop for groceries.



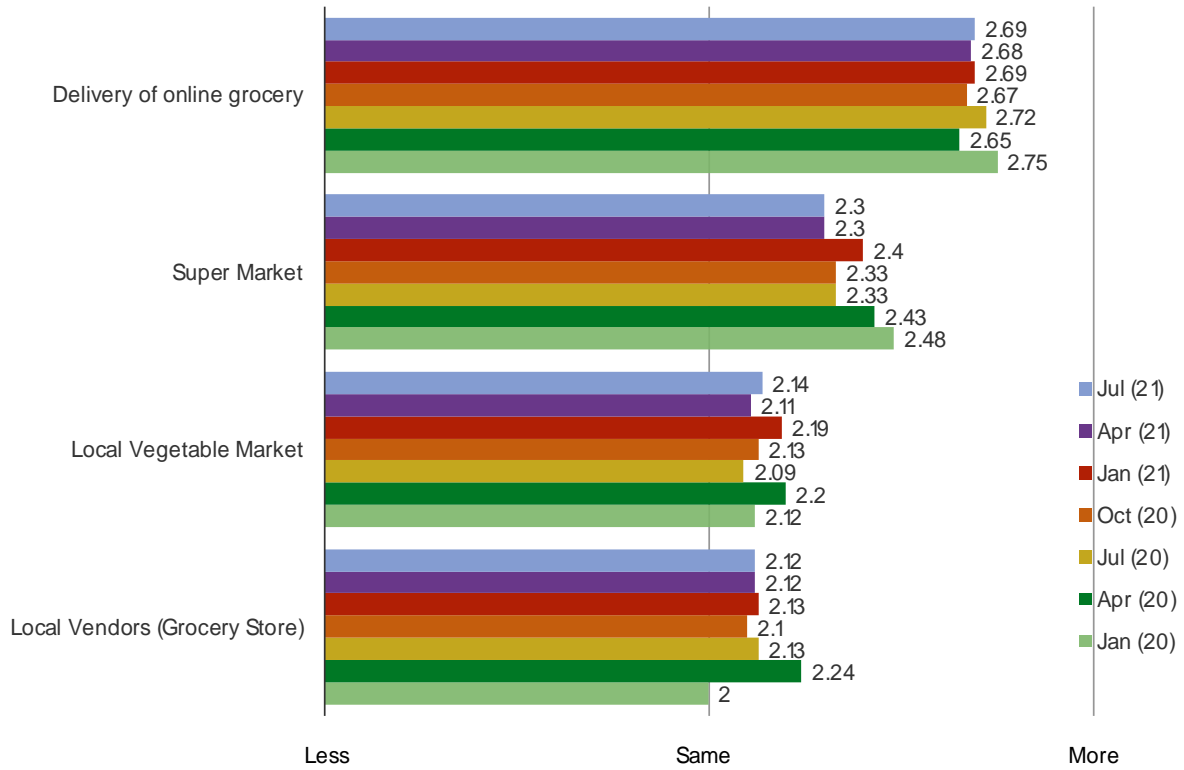
DO YOU THINK THE FOLLOWING ARE GAINING OR LOSING POPULARITY?

Posed to respondents who shop for groceries.



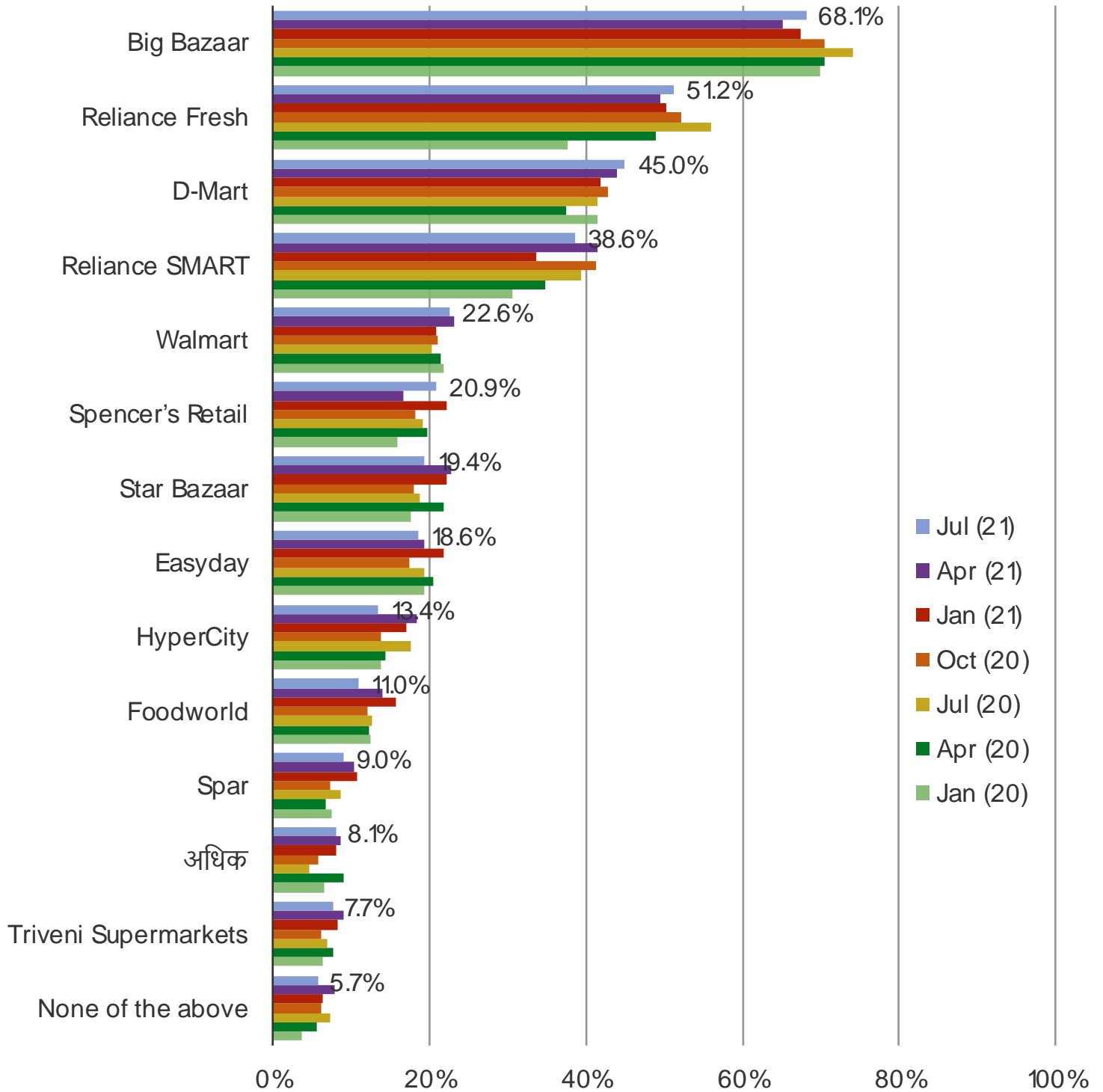
ARE YOU CHANGING HOW OFTEN YOU SHOP FOR GROCERIES VIA THE FOLLOWING?

Posed to respondents who shop for groceries.



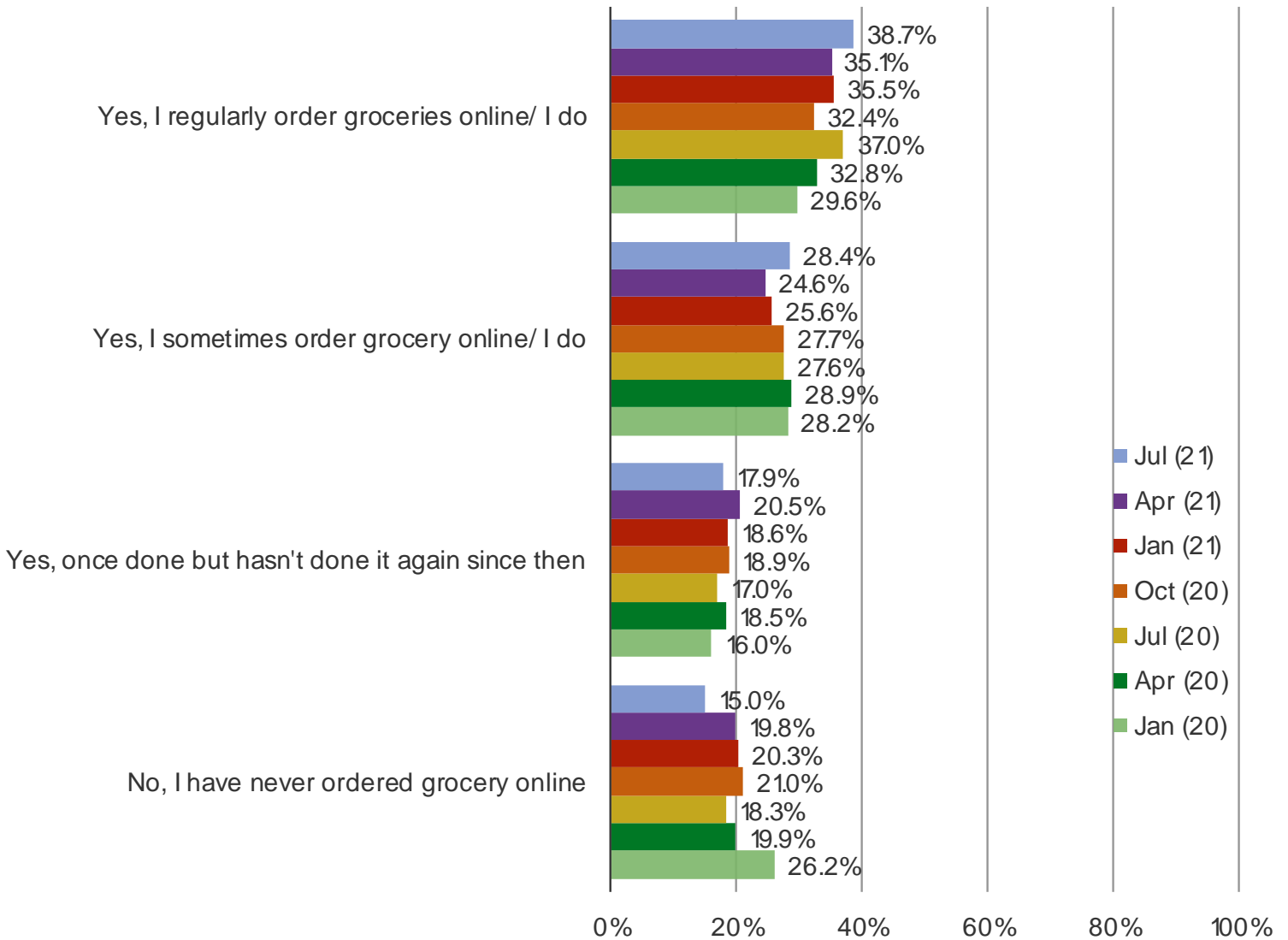
DO YOU PURCHASE GROCERIES FROM THE FOLLOWING REGULARLY OR OCCASIONALLY?

Posed to respondents who shop for groceries.



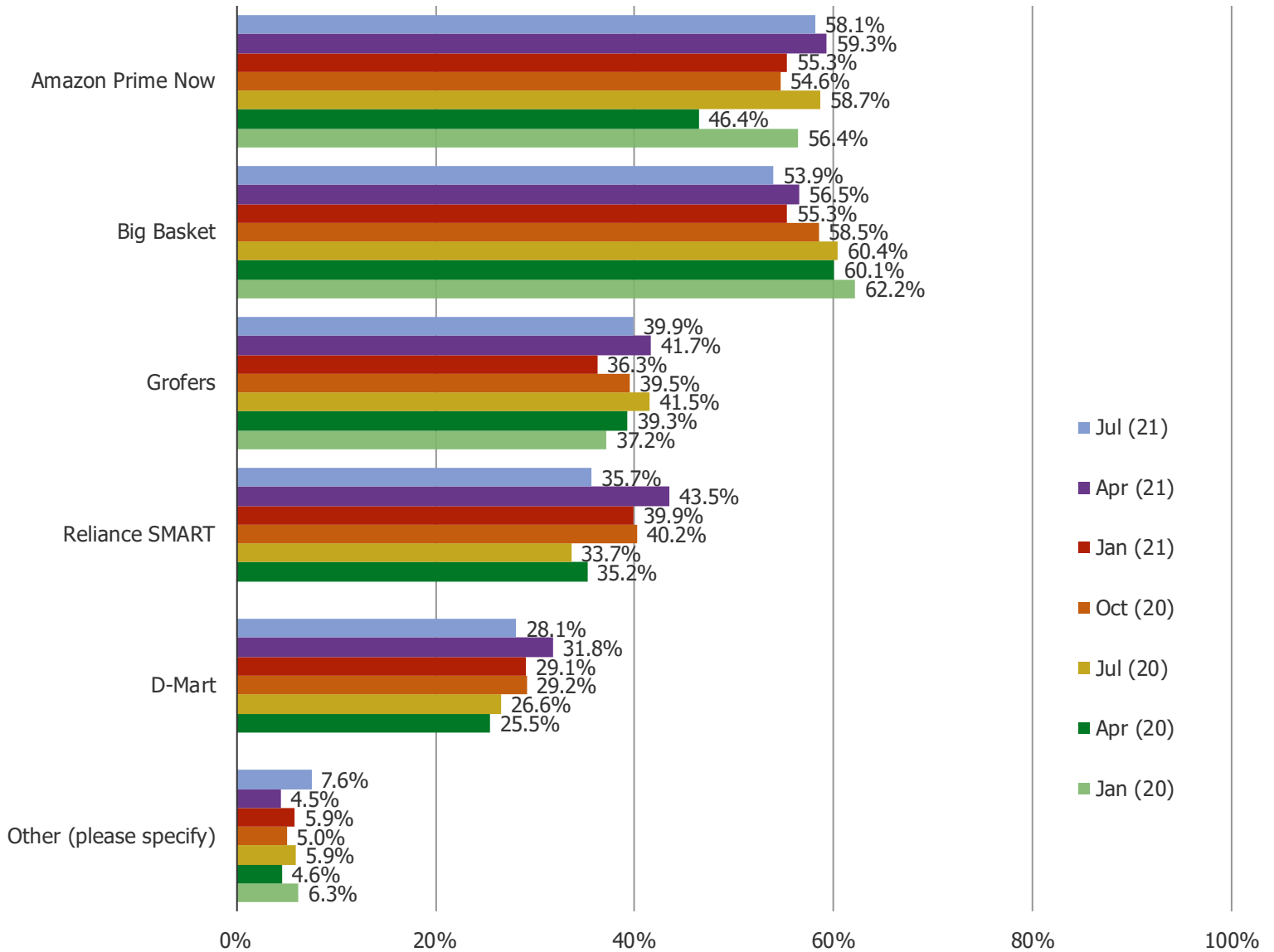
HAVE YOU TRIED TO ORDER GROCERIES FOR ONLINE DELIVERY?

Posed to respondents who shop for groceries.



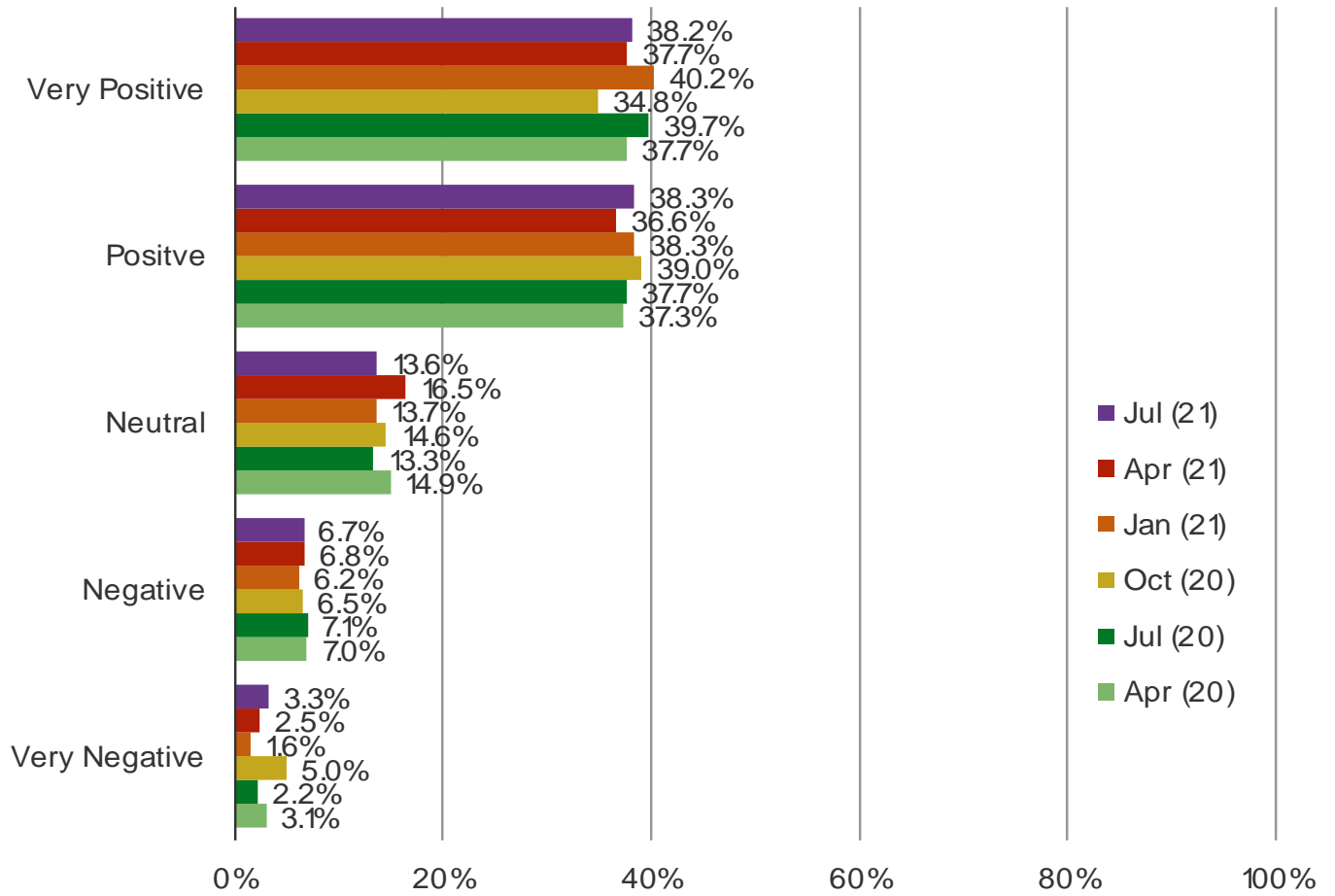
WHICH ONLINE GROCERY PROVIDER HAVE YOU USED?

Posed to respondents who order groceries online.



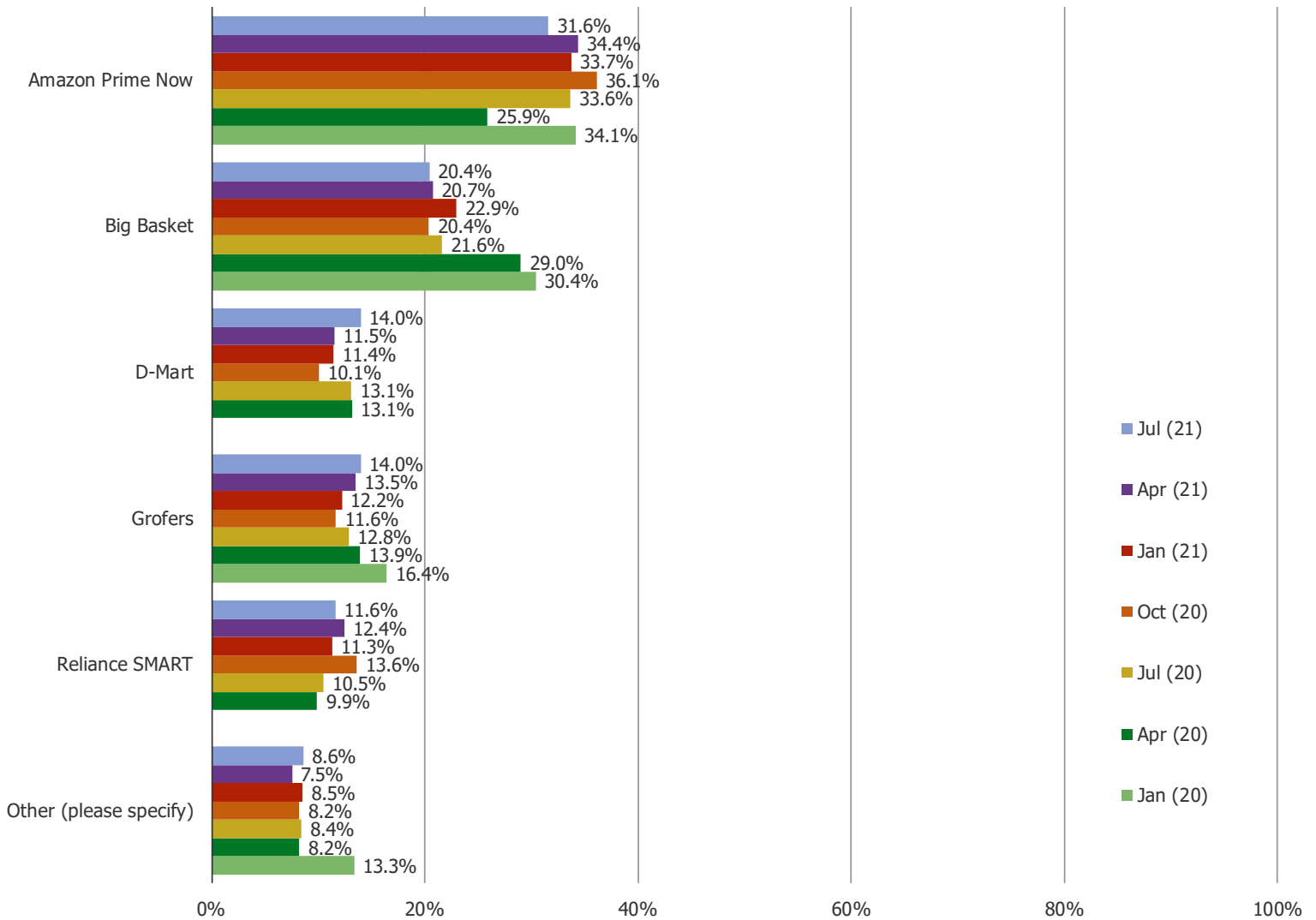
HOW WAS YOUR EXPERIENCE ORDERING GROCERIES ONLINE?

Posed to respondents who order groceries online.



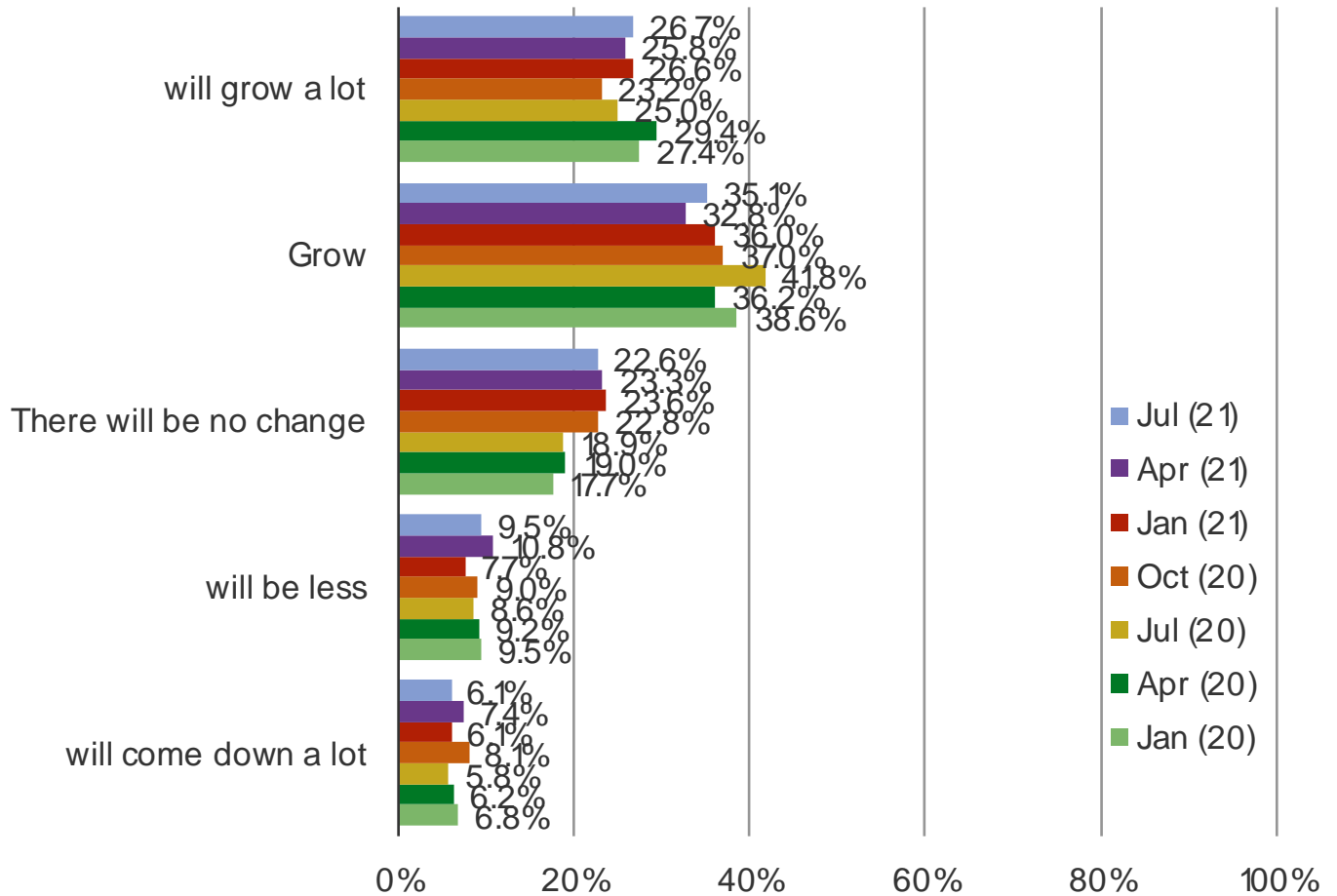
IN YOUR VIEW, WHICH OF THE FOLLOWING IS BEST TO ORDER GROCERIES ONLINE?

Posed to respondents who order groceries online.



DO YOU EXPECT TO CHANGE HOW OFTEN YOU ORDER GROCERIES ONLINE GOING FORWARD?

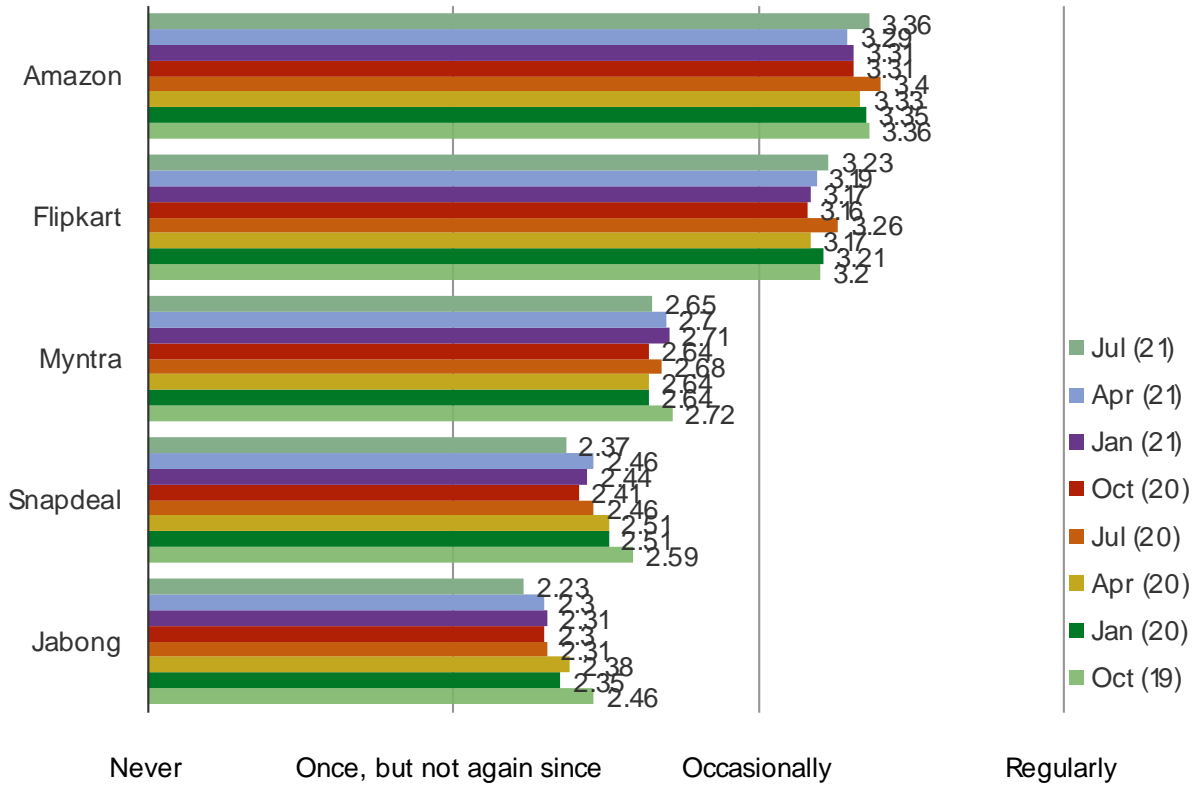
Posed to respondents who order groceries online.



INDIA ECOMMERCE

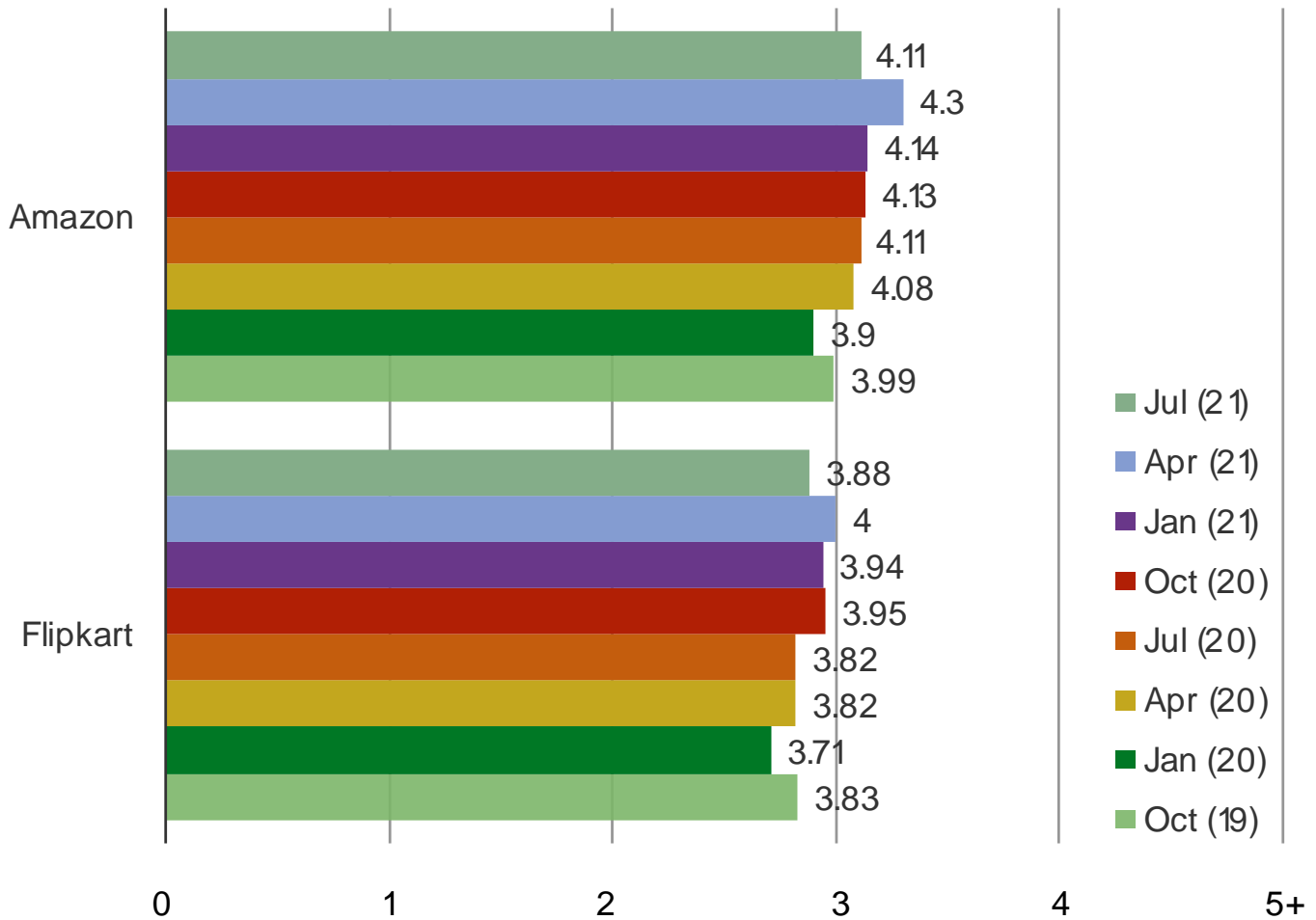
HOW OFTEN DO YOU SHOP THE FOLLOWING?

This question was posed to all respondents.



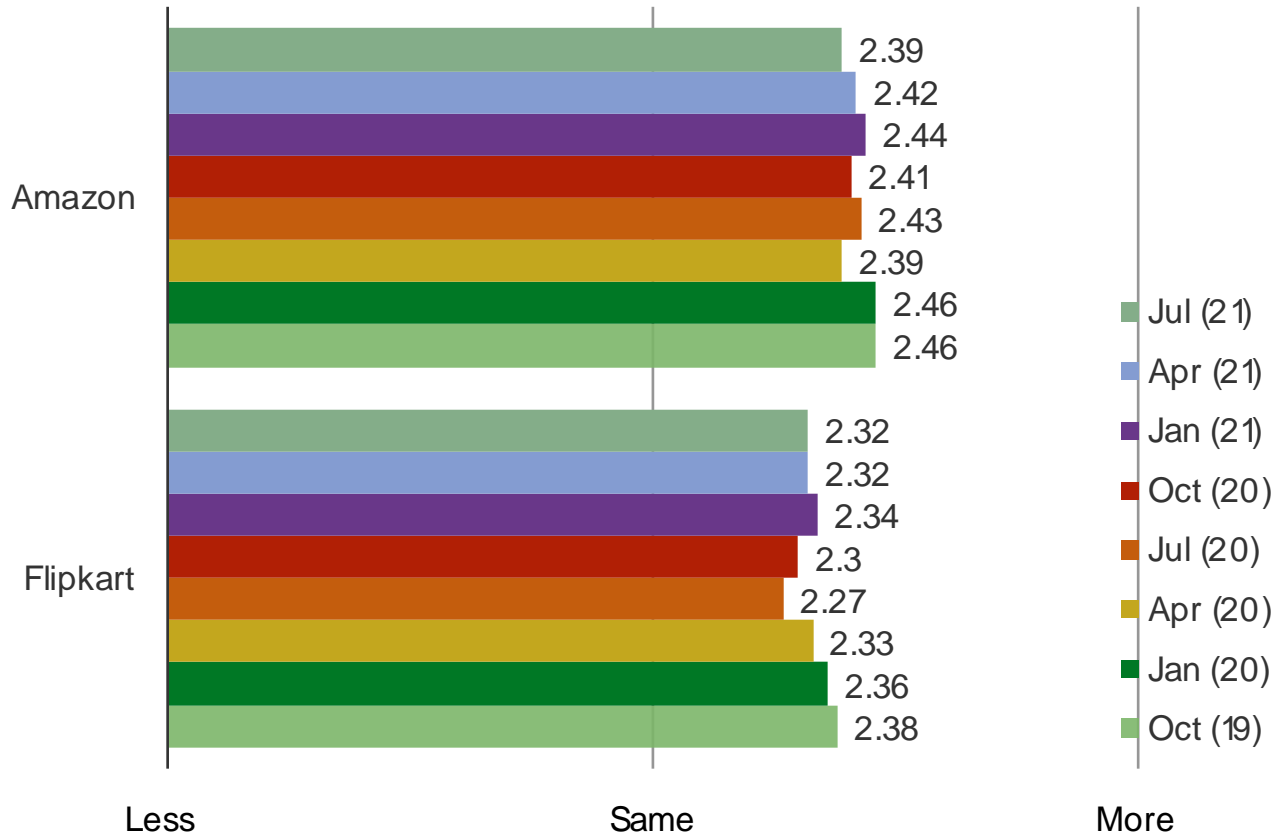
HOW MANY ITEMS DO YOU TYPICALLY BUY PER MONTH?

This question was posed to respondents who said they shop each retailer regularly or occasionally.



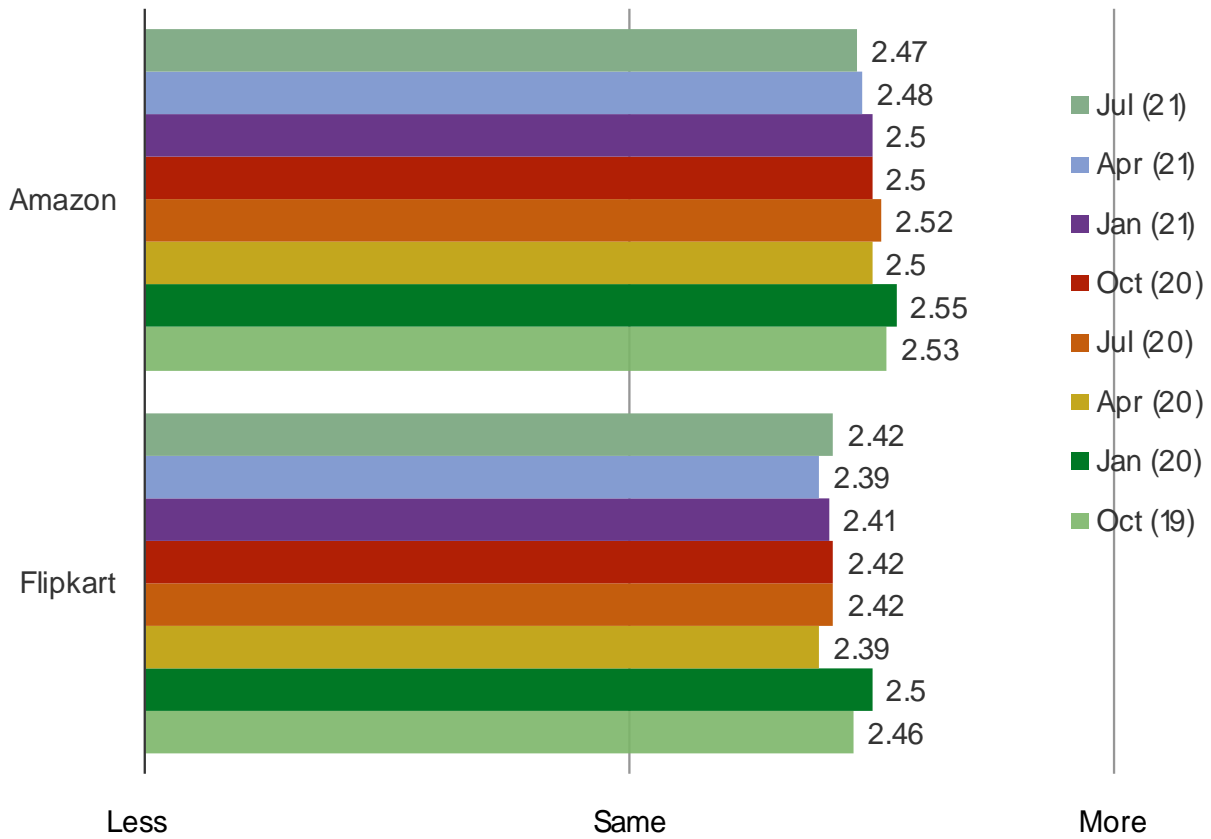
HAVE YOU CHANGED HOW MUCH YOU SHOP HERE COMPARED TO A YEAR AGO?

This question was posed to respondents who have shopped each of the below.



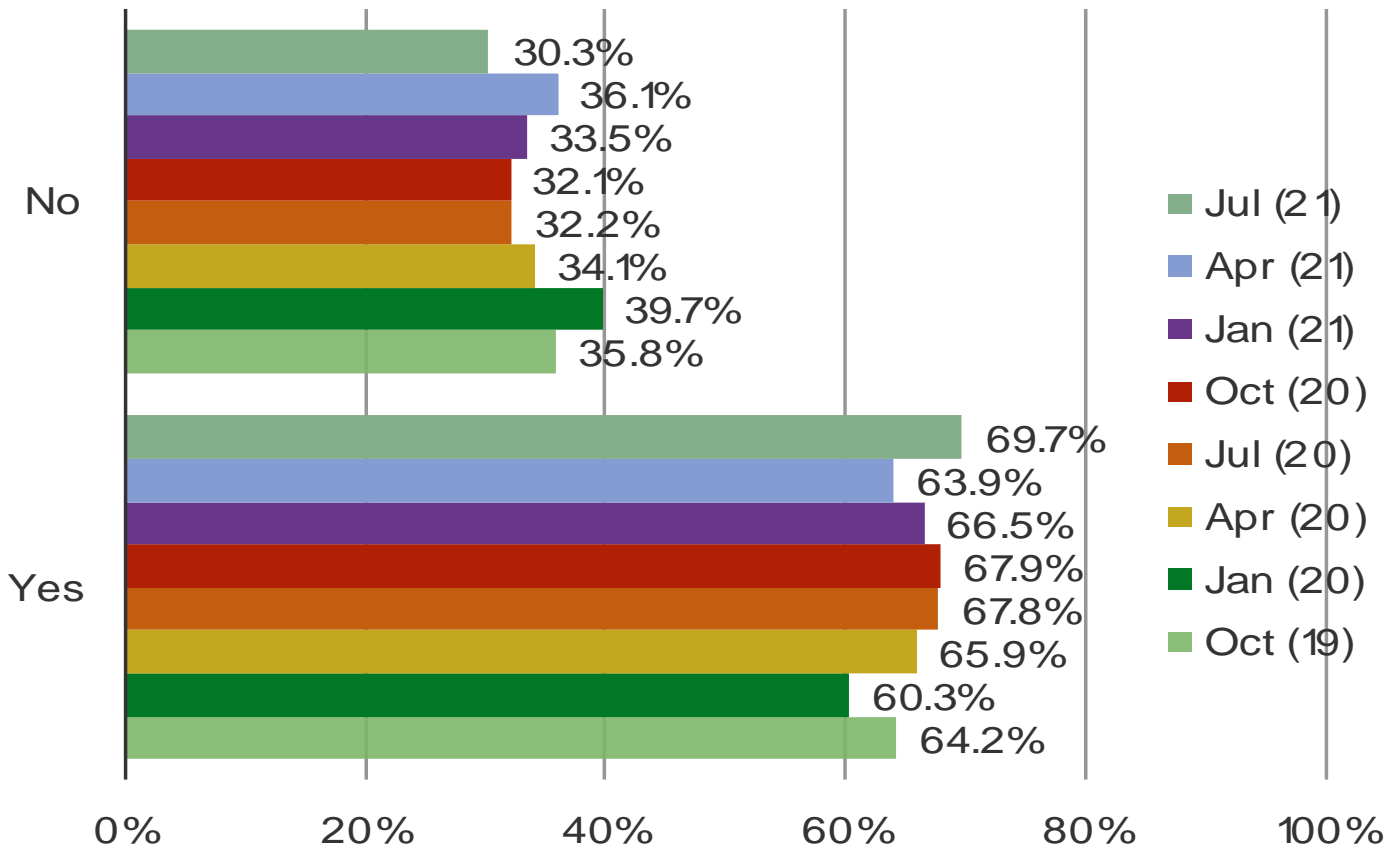
DO YOU EXPECT TO BUY FROM HERE MORE OR LESS GOING FORWARD?

This question was posed to respondents who have shopped each of the below.



ARE YOU AN AMAZON PRIME MEMBER?

This question was posed to all respondents.



ARE YOU A FLIPKART PLUS MEMBER?

This question was posed to all respondents.

