UNDERSTANDING INDIA'S NEXT BILLION INTERNET USERS

A Report By

ShareChat

Bharat Ka Apna Social Media

Knowledge Partner: *Nielsen*

The following report is a research report commissioned by Mohalla Tech Private Limited, conducted by Nielsen as per brief provided by Mohalla Tech Private Limited. The fieldwork is done in an unbiased manner (field work done in an online panel with the centres recommended by ShareChat) without intervention from ShareChat and quality control procedures were followed strictly.

Primary Search Methodology

Primary research was undertaken by Nielsen India to cover the overall social media usage & consumption and online behaviour. The study was based on 3788 online surveys conducted across 81 cities in India to understand the proportion of the population who post/consume content in the social network at least once a week.

Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

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INTRODUCTION

ShareChat is the largest Indian social media platform. The platform was started with an objective to encourage Indian languages in the internet space. Today, the platform has more than 160 million monthly active users. Truly Indian in nature, ShareChat allows Indians to share their thoughts, emotions, opinions; and become friends with others in their mother tongue.

The platform has users from over 2,00,000 pin codes across 15 languages including, Hindi, Tamil, Telugu, Marathi, Kannada, Malayalam, Punjabi, Bengali, Assamese, Gujarati, Odia, Urdu, Bhojpuri and dialects such as Haryanvi and Rajasthani.

ShareChat wanted to understand the behaviour and profile of the UGC users and publish a report to reach out to Brands, Advertisers, and Investors.

ShareChat commissioned a project with Nielsen as their knowledge partner for a primary survey, the finding for which will be used by ShareChat with brands and advertisers.

Definitions To Be Referred

India

Social Networking users who prefer only English for using social network.

Bharat

Social Networking users who prefer Regional languages for using social network.

TARGET GROUP

Research Considerations

The age of the respondent should be 18 or above (minimum criteria to use the social network).

The respondent should be someone who posted/consumed content in the social network at least once a week.

GENDER

Male **71%**

Female **29%**

NCCS

NCCS A **71%**

NCCS B **29%**

CITY TYPE

Metro: **20%**

Tier 1: **40%**

Tier 2: **20%**

Tier 3: **20%**

Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

UNDERSTANDING INDIA VS BHARAT

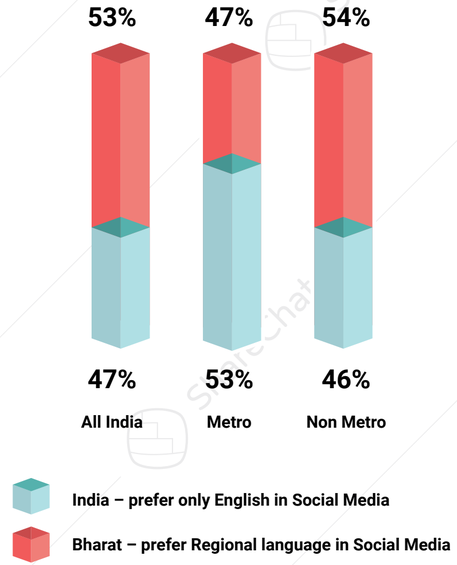
The preference of regional language in Social media is higher in Non-Metro when compared to Metro. Given the fact that a large proportion of the population lives in Non-Metro, there is a scope for regional language social media to grow substantially. Within Metro, the preference for regional language is higher in the South.

Overall preference for regional language is higher in the North (57%) and East zones (55%)

Male prefer to use regional language, while females prefer a mix of both English and Regional for social media.

People who speak **Bengali, Gujarati, Kannada, Marathi, Odia, Punjabi, Rajasthani, Tamil and Telugu** as the first language prefer using their Regional language in Social Media

Language preferred for Social Media



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78%

of Bharat do Social media activity like watch/upload/create content during their leisure time.

85% of Bharat do social media activity or online gaming during their leisure time.

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SOCIAL NETWORKING BEHAVIOUR

3 out of 4 people use social network every day, and they use it most from 7-11 pm.

They use at least 3 times a day and spend more than 5 hours a week. Bharat uses Social network multiple times in a day.

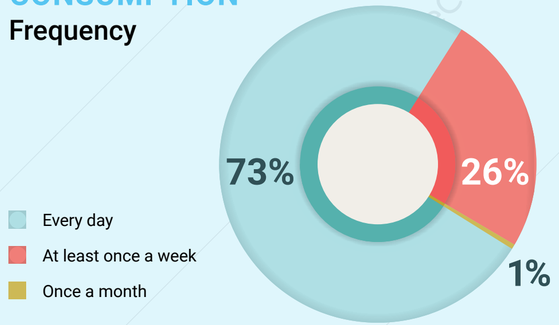
Videos are the most preferred format, and they prefer up to 2 mins.

Keeping in touch with peer group and Entertainment are the top 2 reasons for using Social networks.

9 out of 10 users use Social network along with some other activities.

CONSUMPTION

Frequency



Top Genres Followed /Watched

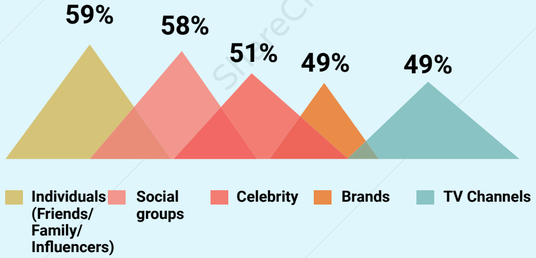
86% Music

87% Comedy

85% News

Comedy and music were the top 2 genres among Bharat

Content They Follow



They mostly follow individual content from friends/ family & influencers

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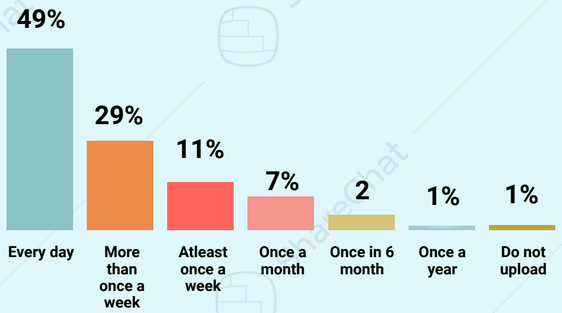
SOCIAL NETWORKING BEHAVIOUR

Uploading Frequency

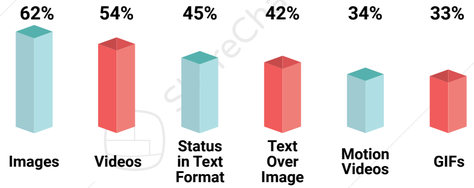
1 out of 2 uploads content on the social network every day, and it is comparatively higher in the south.

1/3rd of the social network users share their posts with the public, East higher in public sharing.

Fourth of Bharat post public content.

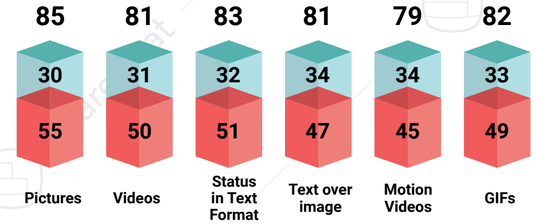


Highest Uploaded Formats



Images followed by videos are uploaded the most. Video upload is higher in the North.

Comfort in sharing the content



4 out of 5 of those who upload contents are comfortable in uploading any form of content that includes photos, videos, gifs, text over an image, etc.

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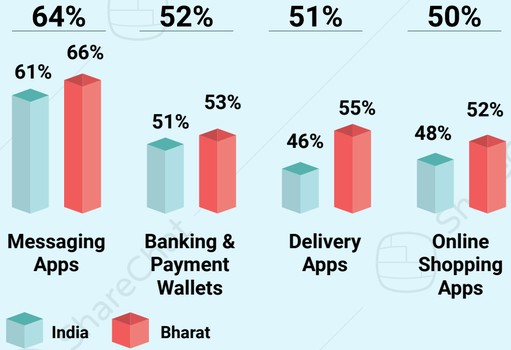
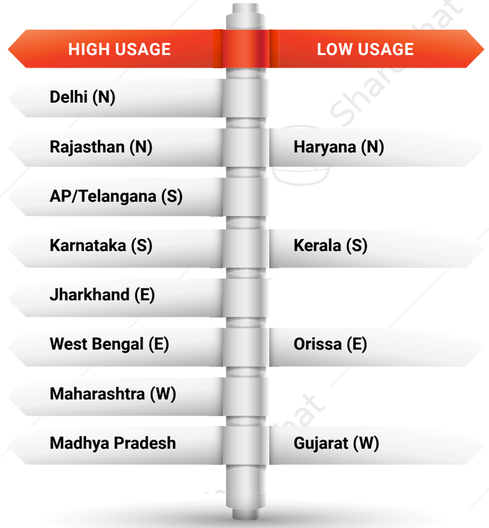
INTERACTION WITH DIGITAL APPS



Messaging, Banking & Payment, Delivery, and Online shopping are the top 4 Digital Apps **used by every 2nd Social media user.**

Messaging Apps are used across the town class. While other online Apps has higher usage in Metros

Messaging, Delivery, and Online shopping apps Skews **to Bharat.** The gap is higher in **Fashion Lifestyle and Ticket Booking Apps.**



Delhi(N), Rajasthan(N), AP/Telangana(S), Karnataka(S), Jharkhand(E), West Bengal(E), Maharashtra (W) and Madhya Pradesh in respective Zones are high on the usage of Digital Apps

Low usage of Digital Apps seen in **Haryana (N), Kerala (S), Orissa(E) and Gujarat(W)**

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DURABLE OWNERSHIP

Almost all the household of the Social Media users have Colour TV.

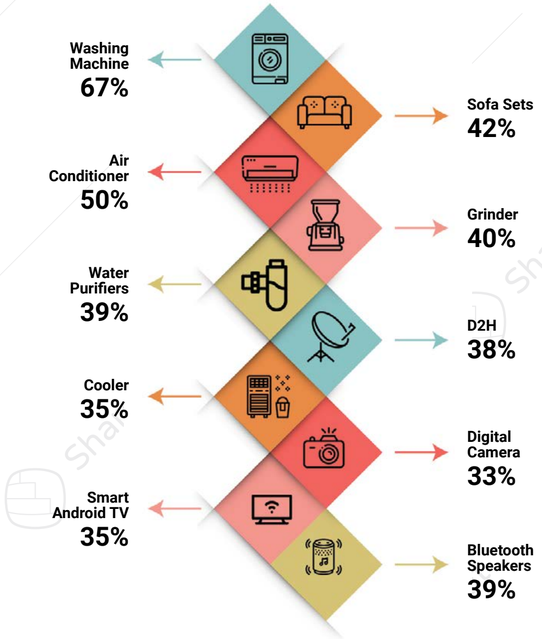
Air Conditioner, Sofa sets, Grinders, Water Purifiers, Bluetooth, Smart/ Android TV skews to Metro. Cooler skews to Non-Metro.

Except for Washing Machine and D2H, ownership of rest all durables are lower among Bharat.

Durable ownership is higher in Delhi(N), Rajasthan(N), AP/Telangana(S), Karnataka(S), West Bengal(E), and in Maharashtra(W).

Durable ownership is lower in Haryana(N), Kerala(S), Orissa(E), and Madhya Pradesh(W).

Ownership of Smart Gadgets like Bluetooth speaker and SmartWatch seen higher among the East mainly coming from Bihar and West Bengal.



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CATEGORIES THEY BOUGHT

Fashion Products are bought equally among the Metro and Non-Metros, where the other categories are bought more in Metro than in Non-Metro.

Delhi and Rajasthan are the top buyers of all the categories.

Bharat has bought more categories when compared to India in the last 3 months.

Categories like Beauty & Grooming, Home Furnishing & Décor, Computer Accessories, Non-Electronic Devices, Media, and Computer Devices are bought more among Bharat.

India			Bharat
63%	62%	Fashion Products	61%
50%	Groceries	50%	49%
47%	49%	Beauty & Grooming	52%
42%	Home Furnishing & Decor	46%	50%
34%	36%	Mobile Phones	37%
32%	Computer Accessories	36%	39%
35%	33%	Books & Stationaries	31%
26%	Non Electronic Devices	29%	32%
25%	27%	Media	29%
19%	Computer Device	22%	25%

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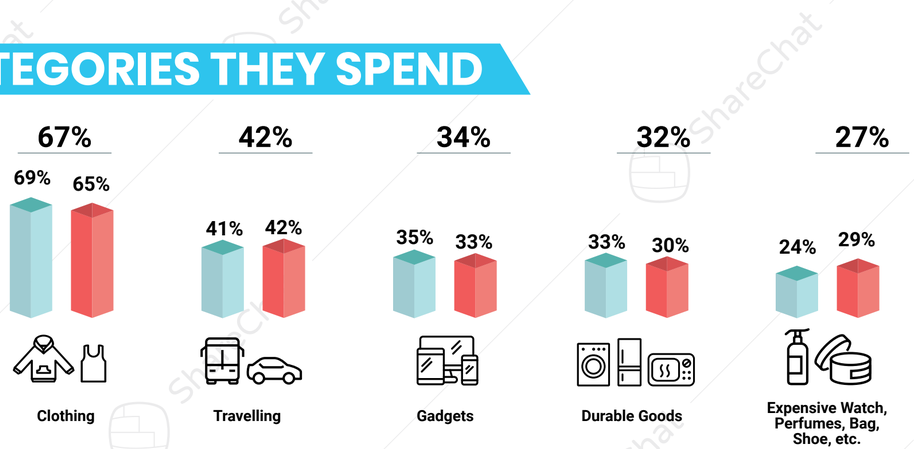
CATEGORIES THEY SPEND



India is driven towards clothes and durables goods when it comes to spending. India also spends higher in cosmetics as compared to Bharat.

Bharat spends significantly higher on expensive watches, perfumes, bags, shoes, etc. as compared to India.

Bharat also spends more on home furnishing, gym, club, sports arena membership as compared to India.

Clothes are the top spending category in Metros (Bangalore, Delhi, Mumbai falls among the higher spenders). Delhi, Bihar, Gujarat, Uttar Pradesh, Assam, and Maharashtra are the states that spend more on clothes.

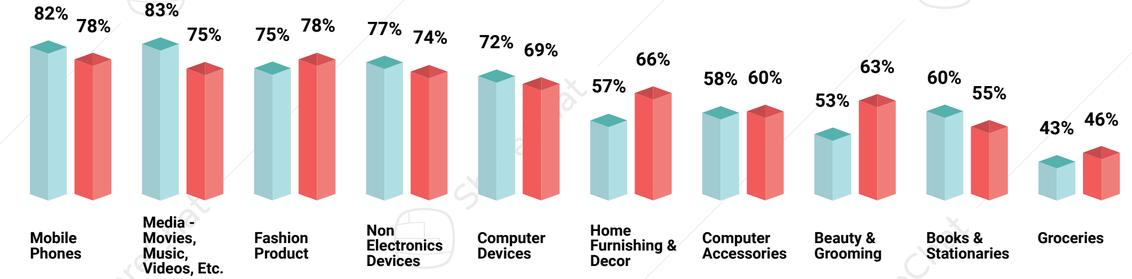
Comparatively, Haryana, Punjab and Tamil Nadu spend less on Clothes.

Travelling is the second most spent category. Rajasthan, Karnataka, and Jharkhand are the top 3 states on spending for Travel. Haryana, AP/ Telangana, and Orissa take the lower spots on Travel spending.

Jewellery, cosmetics, and home furnishing are the next 3 categories where they spend.

Spending on expensive watch/perfume/bag/shoe and home furnishing higher among the Bharat compared to India.

CATEGORIES THEY BOUGHT ONLINE



Fashion, Mobile Phones, Non-Electronic devices, and Media are among the top bought online categories.

Fashion, Home Furnishing & Décor, and Beauty & Grooming have a better purchase rate in Bharat when compared with India.

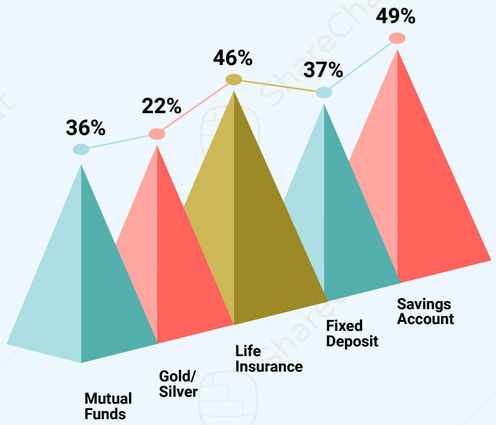
Delhi, Karnataka, Rajasthan, and West Bengal buys more categories online than other states.

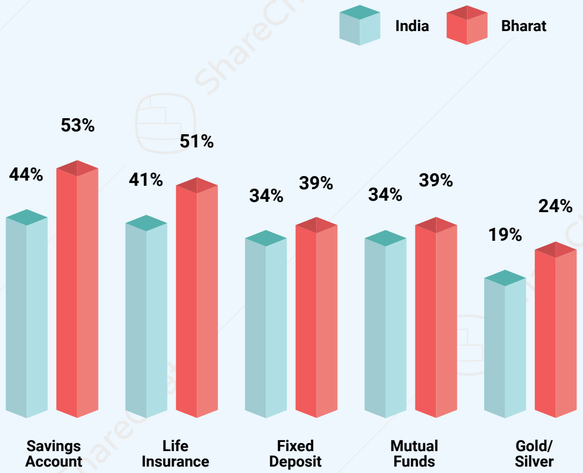
INVESTMENTS THEY DO

9 out of 10 do at least one investment, of which 8 invest themselves, and only one invests through someone else.

Delhi, Bihar, and West Bengal are the top 3 states with people favouring investments. Jharkhand, Orissa, and Punjab are the bottom 3 states in investments.

1-2 out of 10 invest in Post office, Stock Market, Real Estate, PF, RD, or PPF.





On average, Bharat invests in 4 different investment plans while India invests in 3 investment plans.

Bharat's investment among the top 5 investment tools is higher when compared with India.

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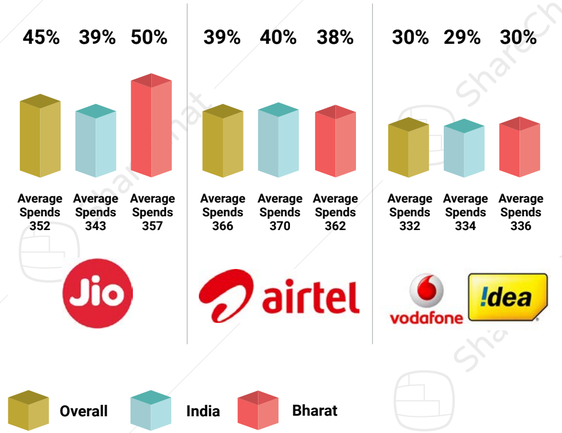
MOBILE AND NETWORK

Data plans became cheaper across the network, and hence 9 out of 10 use the mobile network to access the internet most of the time.

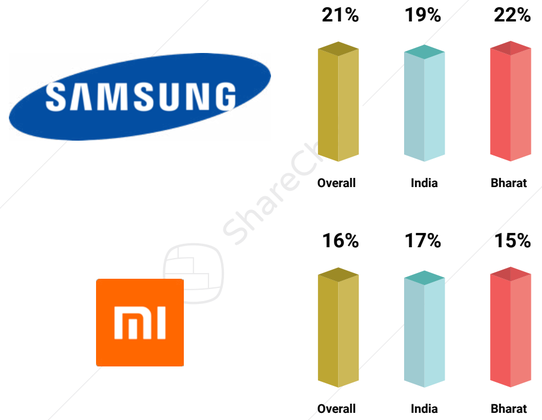
The usage of Jio is higher among Bharat when compared with India.



Samsung and Mi are the Top 2 mobile Brands.

Samsung is higher in Metro and East (Bihar and West Bengal) and lower in North (Haryana) and South (Karnataka).

Mi is higher in West (Gujarat) and lower in South (Kerala).



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SUMMARY

Social Network Users are younger (less than 35 years). Growth in UPI and payment wallets and their penetration across the town class resulted in higher usage of payment wallets.

They use Social network whenever they get free time. Keeping in touch with peer group and entertainment are the top 2 reasons for them to use the social network, and their preferred genre is Technology and News.

Pictures followed by videos are the most used format for posting/uploading. 2 out of 5 Bharat post content publicly, India post mix of public and only to friends.

Video is the most preferred consumption format. 1 out of 2 people either share the content or like the content post seeing it on the social network. They prefer video content with less than 2 min.

Clothing and Travelling are the Top 2 categories they spend. Spends on Expensive watch/perfume/ bag/ shoe and Home furnishing higher among the Bharat compared to India.

Samsung is the most used mobile, and Reliance Jio is the most used network connection. Social network users seek value for money for the products they buy.

1 out of 2 use social network at least 3 times a day and spend more than 5hour in a week. Usage is seen higher between 7-11 pm. Bharat uses the social network multiple times in a day when compared to India. 9 out of 10 use the social network while doing some other activities like listening to music or waiting for someone.

UNDERSTANDING INDIA'S NEXT BILLION INTERNET USERS

ZONE AND STATE DISCOVERY

EAST

Interaction with Digital Apps

Top 3 apps used in the East are Messaging Apps, News, and Shopping Apps.

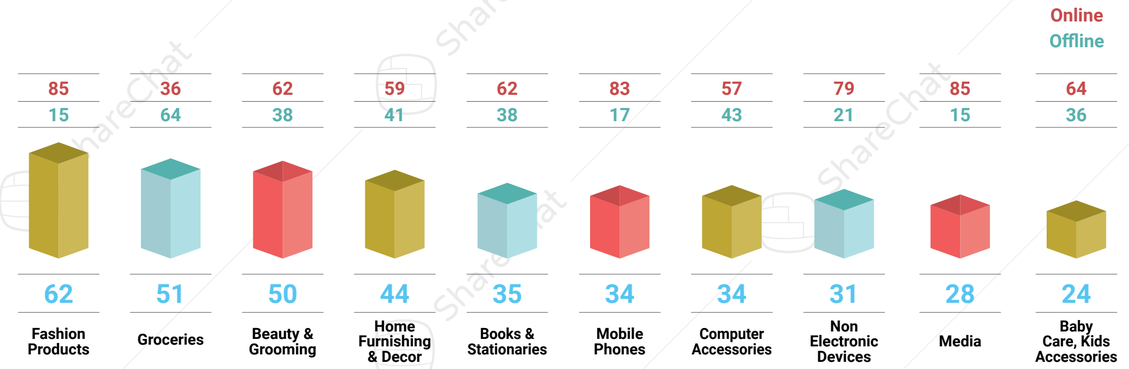
58%
Messaging Apps

55%
News Apps

54%
Shopping Apps

Top Categories They Bought

Fashion, Groceries, and Beauty & Grooming are among the top 3 bought categories.



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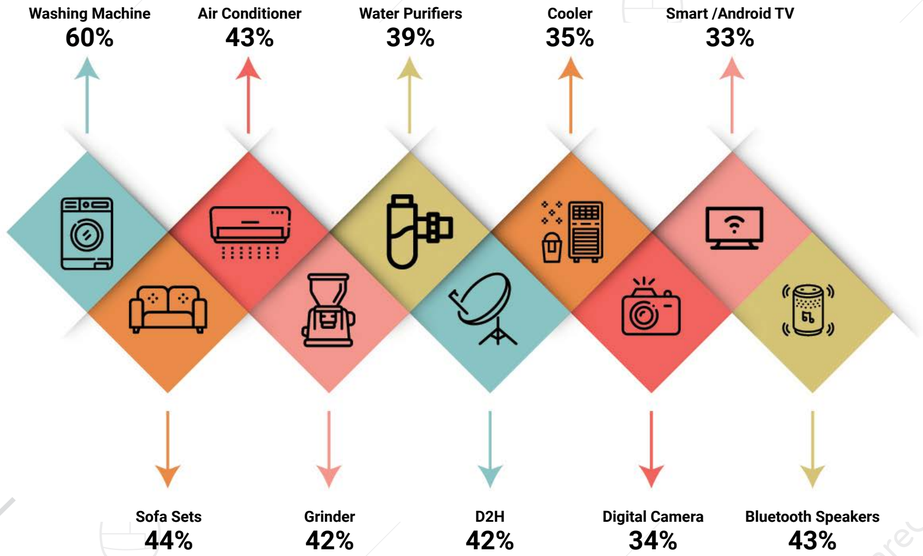
Top 10 Durables Owned

Washing Machine, Sofa, Bluetooth speakers and Air Conditioners among the top durables owned.



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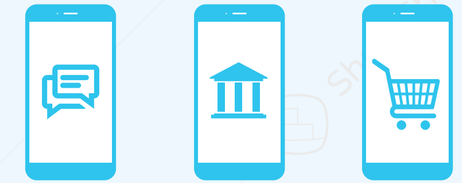
ASSAM

Interaction with Digital Apps

Top 3 apps used in Assam are Messaging Apps, Banking, and Shopping Apps skews to Females.



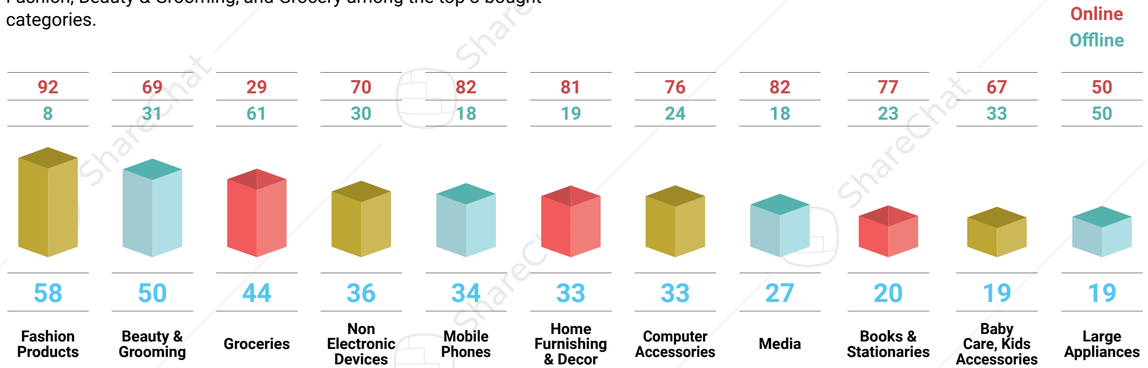
61%
Messaging Apps

56%
Banking & Payment Apps

56%
Shopping Apps

Top Categories They Bought

Fashion, Beauty & Grooming, and Grocery among the top 3 bought categories.



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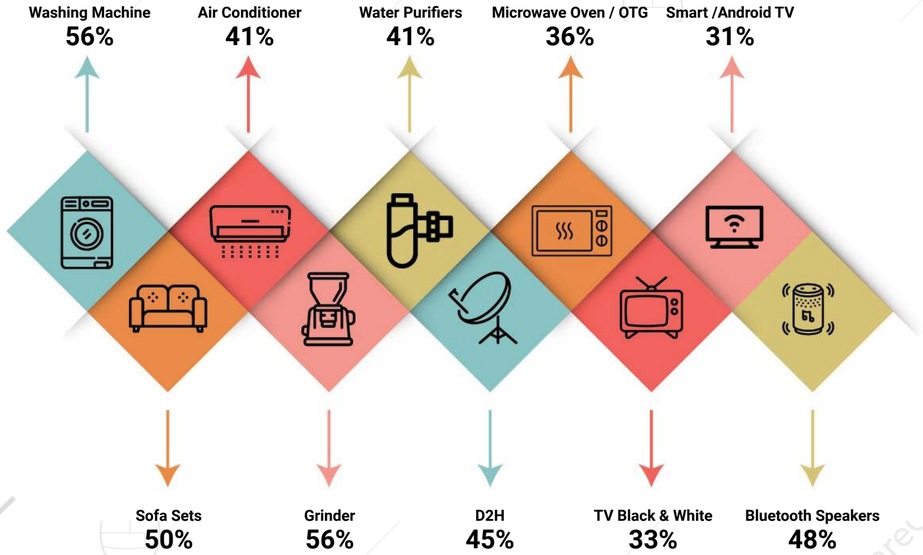
Top 10 Durables Owned

Washing Machine, Grinder and Sofa set among the top durables owned.



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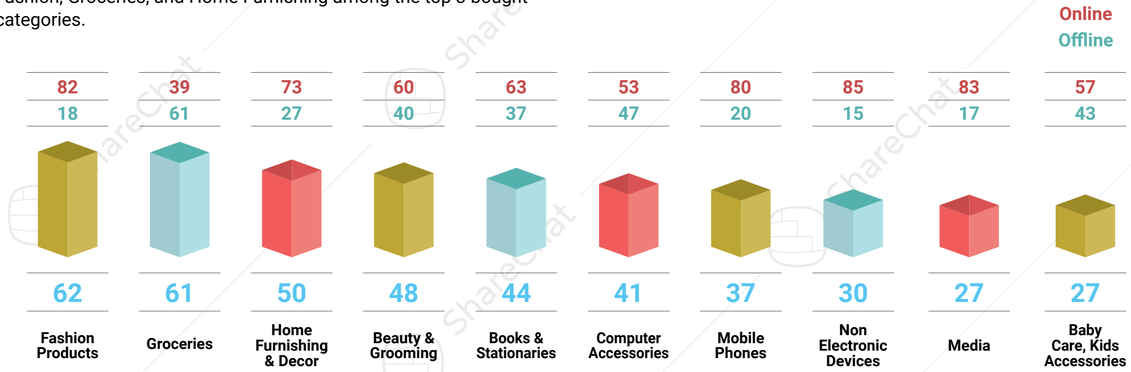
BIHAR

Interaction with Digital Apps

Top 3 apps used in Bihar are News, Messaging Apps, and Shopping Apps.

Top Categories They Bought

Fashion, Groceries, and Home Furnishing among the top 3 bought categories.



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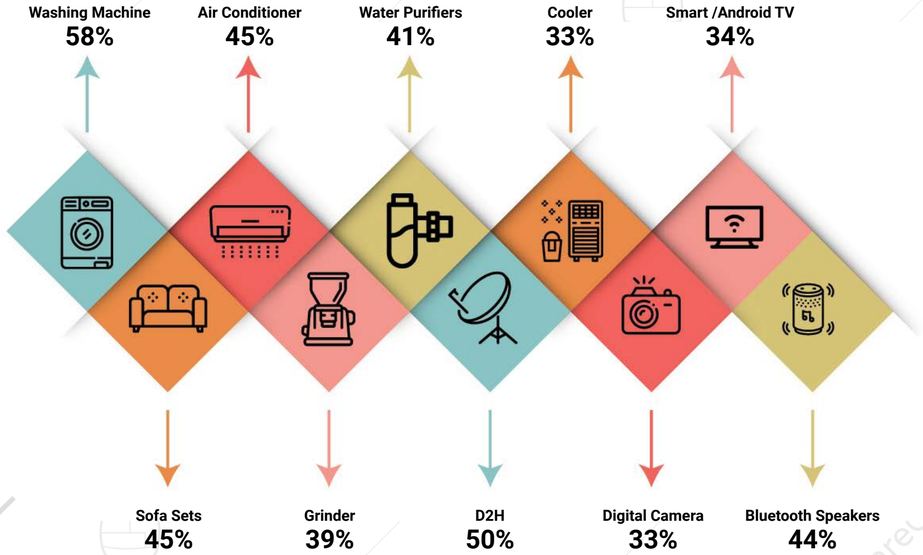
Top 10 Durables Owned

Washing Machine, D2H, Air Conditioner and Sofa set among the top durables owned.



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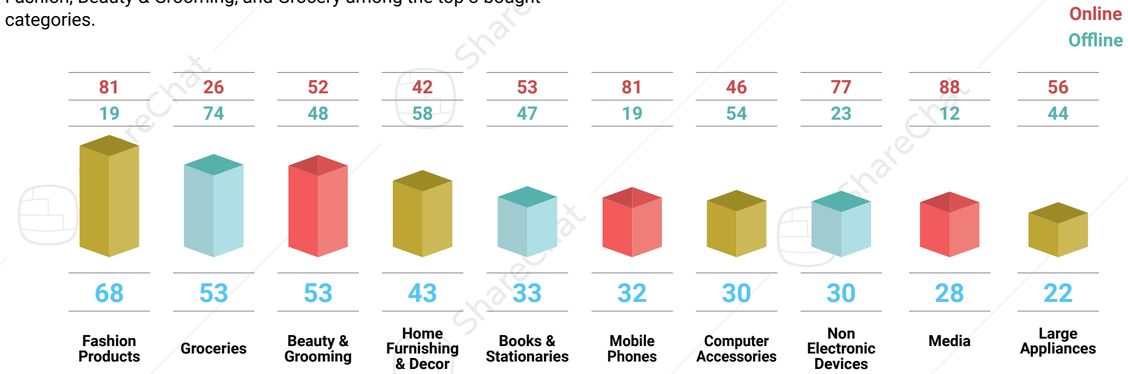
JHARKHAND

Interaction with Digital Apps

Top 3 apps used in Jharkhand are Shopping Apps, Messaging, and Banking/Payments Apps.

Top Categories They Bought

Fashion, Beauty & Grooming, and Grocery among the top 3 bought categories.



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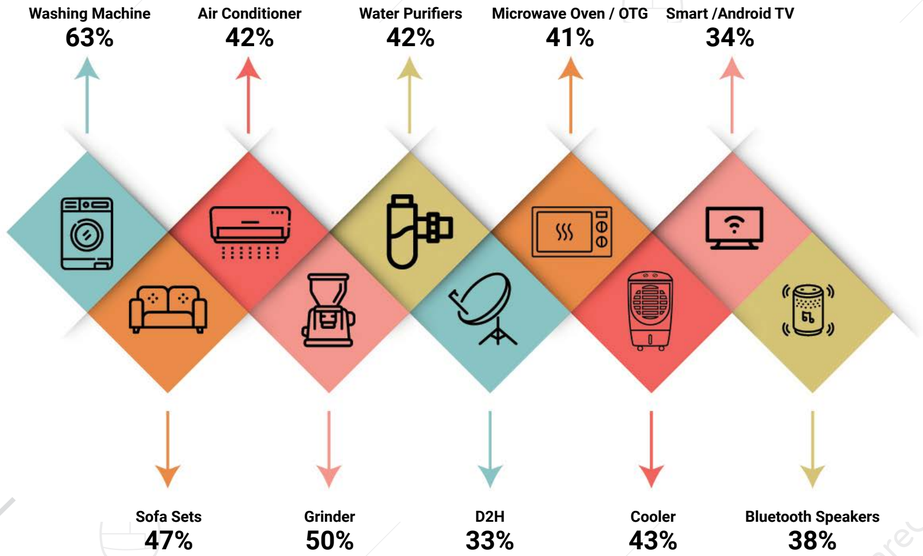

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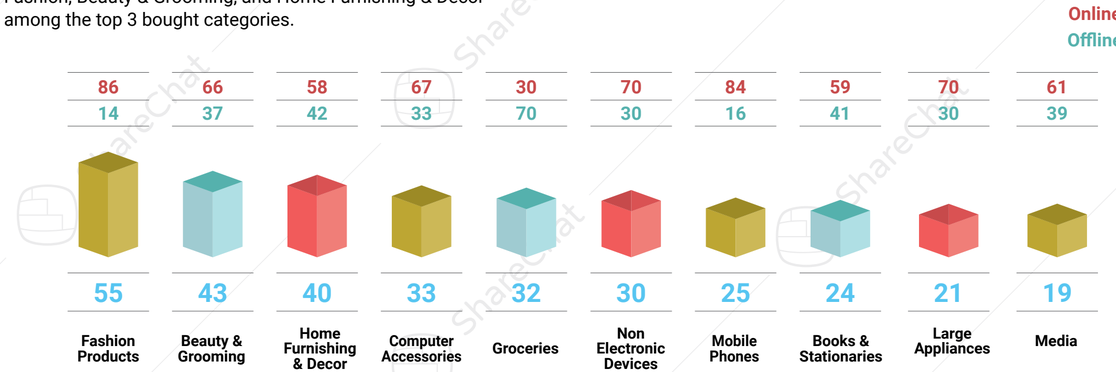
ORISSA

Interaction with Digital Apps

Top 3 apps used in Orissa are News, Messaging Apps, and Entertainment Apps.

Top Categories They Bought

Fashion, Beauty & Grooming, and Home Furnishing & Decor among the top 3 bought categories.



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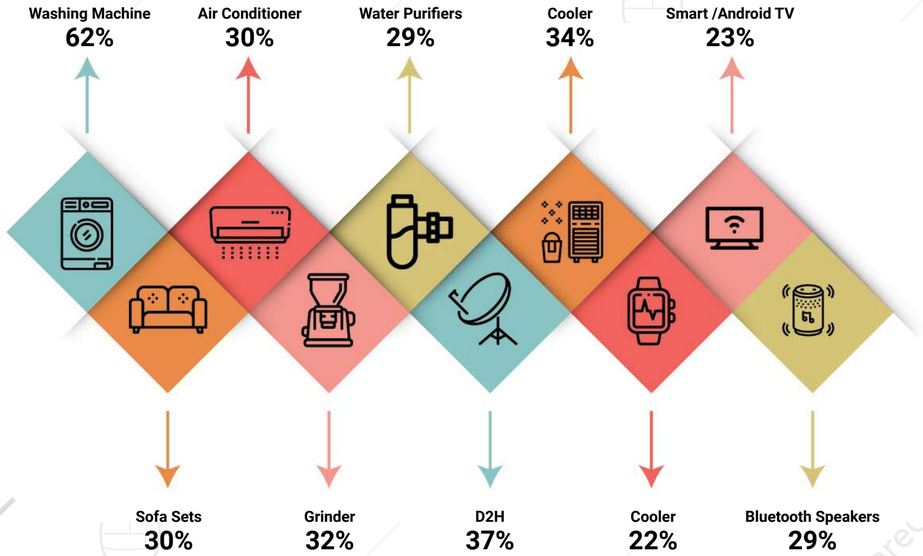
Top 10 Durables Owned

Washing Machine, D2H and Cooler among the top durables owned.



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WEST BENGAL

Interaction with Digital Apps

Top 3 apps used in West Bengal are Messaging Apps, News and Entertainment Apps.

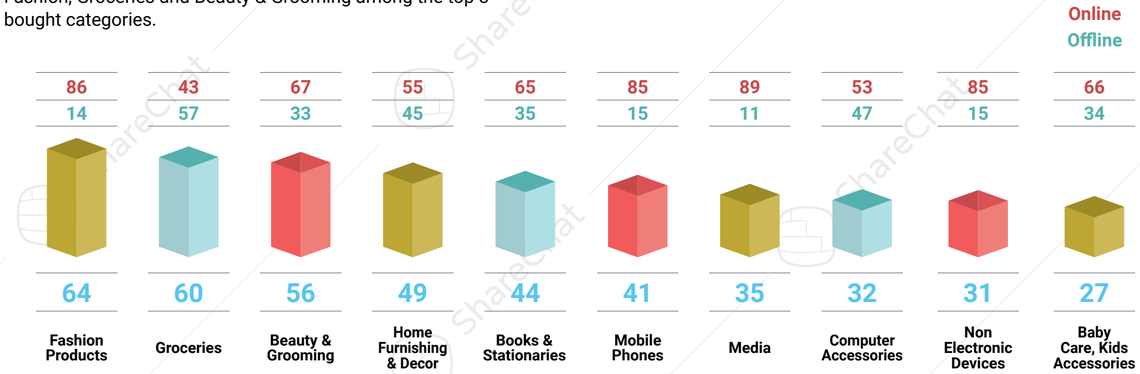
66%
Messaging Apps

62%
News Apps

60%
Entertainment Apps

Top Categories They Bought

Fashion, Groceries and Beauty & Grooming among the top 3 bought categories.



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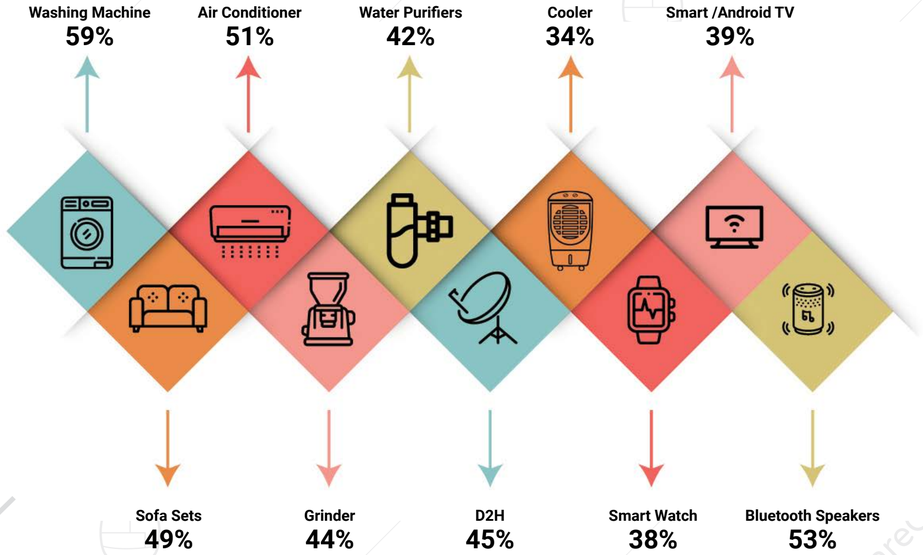
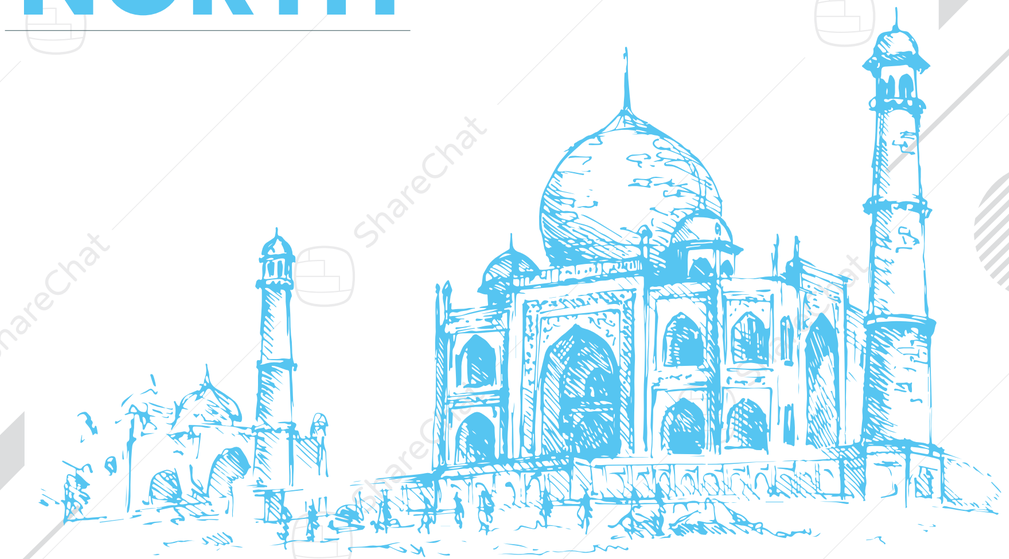
Top 10 Durables Owned

Washing Machine, Bluetooth speakers and Air conditioner among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

NORTH



Interaction with Digital Apps

Top 3 apps used in North are Messaging Apps, Banking, and Delivery Apps.

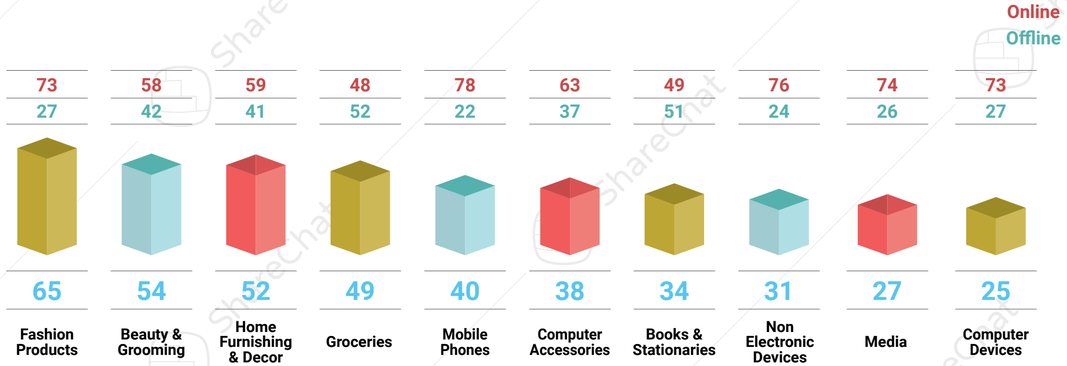
70% Messaging Apps

55% Banking & Payment Apps

53% Delivery Apps

Top Categories They Bought

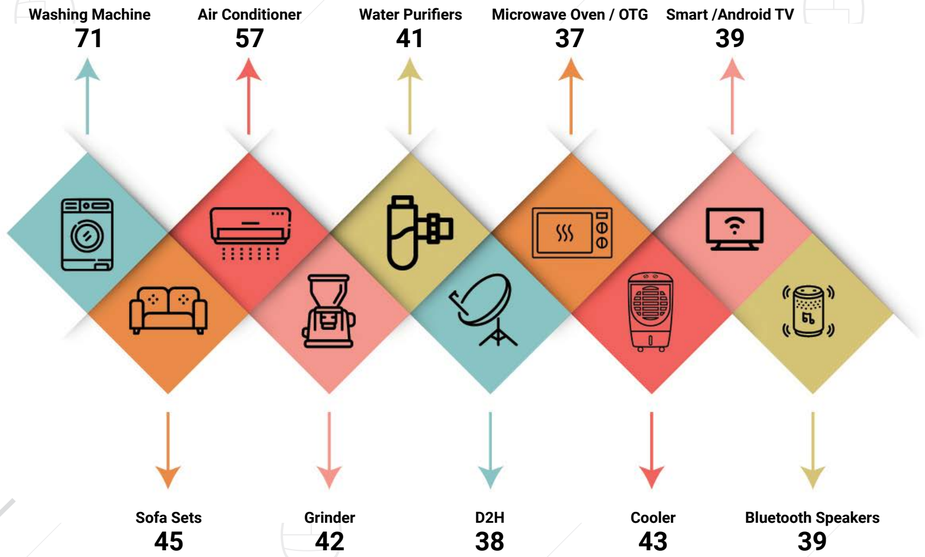
Fashion, Beauty & Grooming,, and Home Furnishing & Decor among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air conditioner and Sofa Sets among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

DELHI

Interaction with Digital Apps

Top 3 apps used in Delhi are Messaging Apps, Banking, and Shopping Apps.

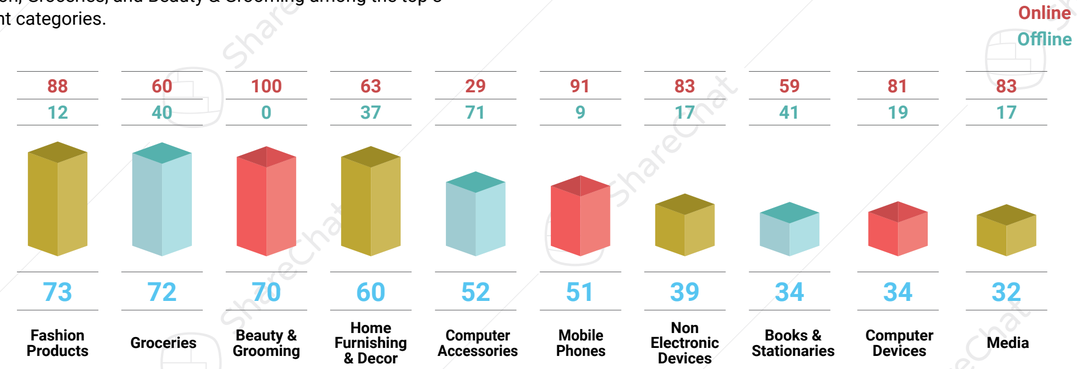
77%
Messaging Apps

76%
Banking & Payment Apps

70%
Shopping Apps

Top Categories They Bought

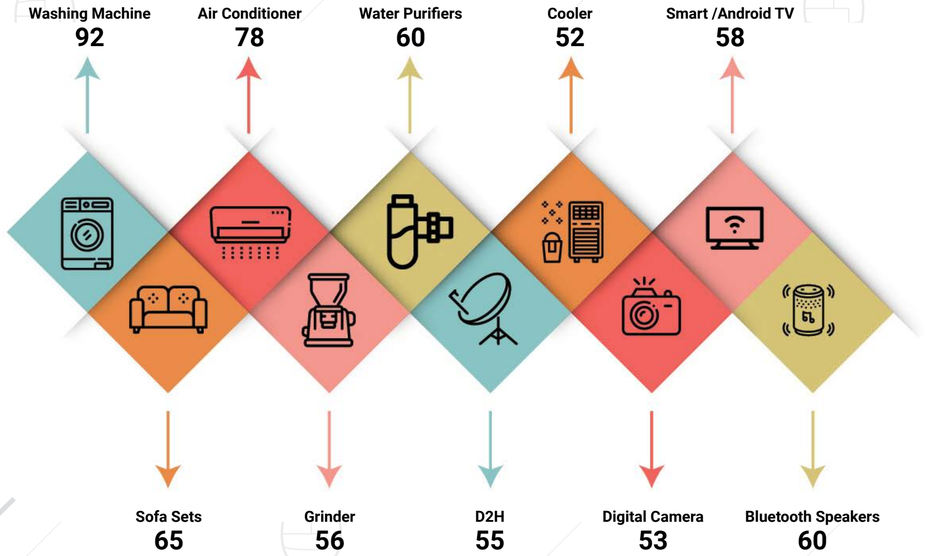
Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air Conditioner and Sofas among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

HARYANA

Interaction with Digital Apps

Top 3 apps used in Haryana are Messaging Apps, Delivery, and Music Apps.

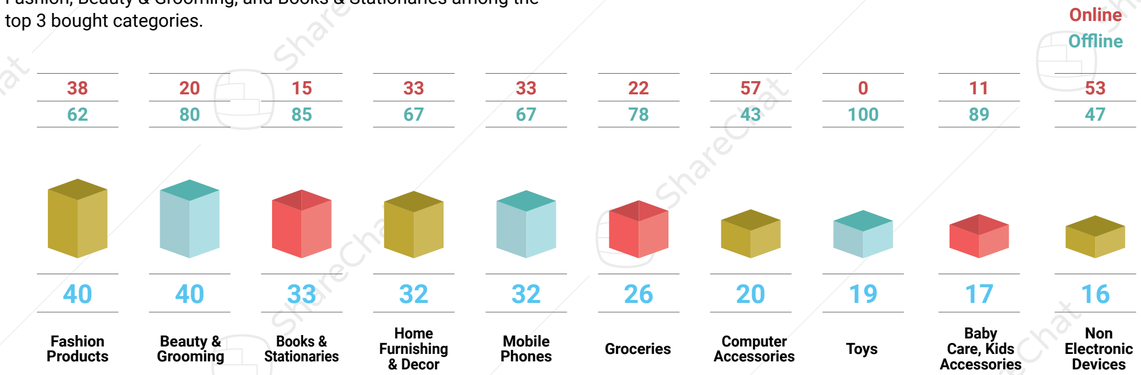
80% Messaging Apps

29% Delivery Apps

29% Music Apps

Top Categories They Bought

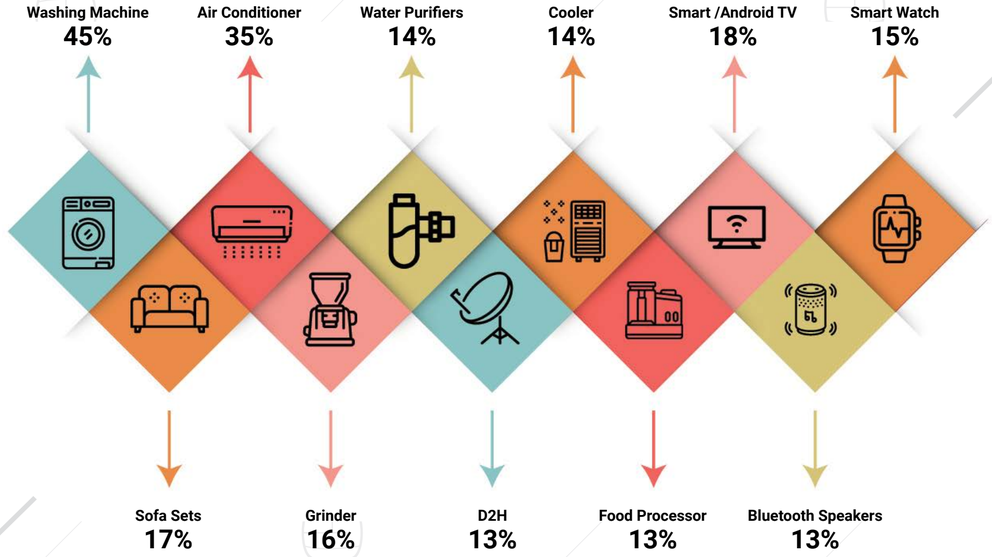
Fashion, Beauty & Grooming, and Books & Stationaries among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine and Air Conditioner among the top durables owned



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

PUNJAB

Interaction with Digital Apps

Top 3 apps used in Punjab are Messaging Apps, Banking, and Delivery Apps.

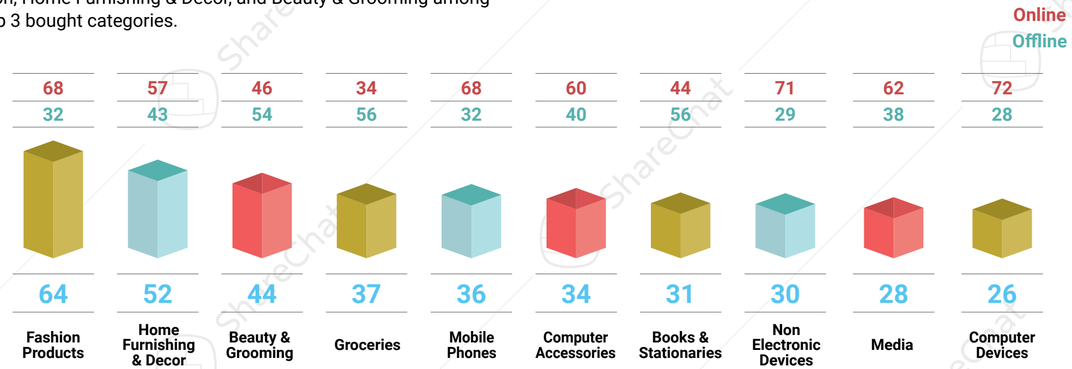
65%
Messaging Apps

48%
Banking Apps

48%
Delivery Apps

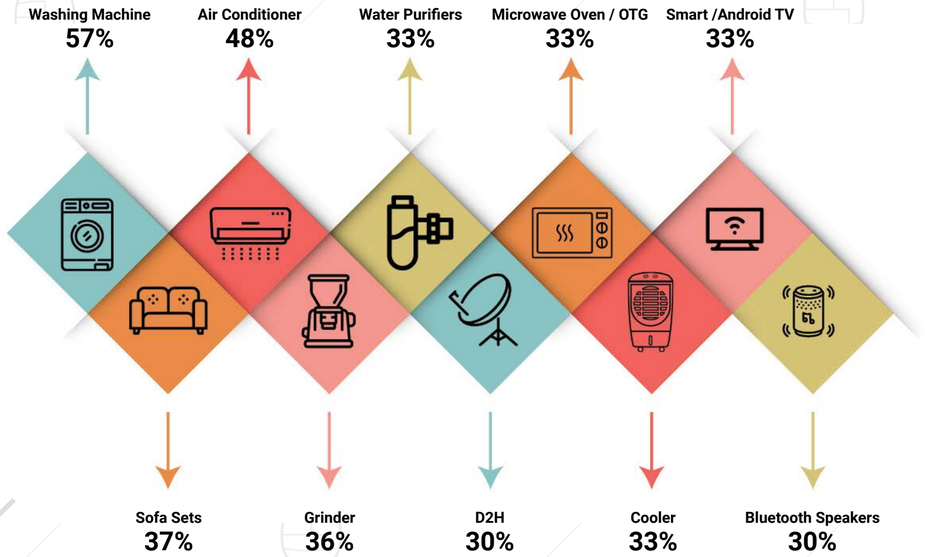
Top Categories They Bought

Fashion, Home Furnishing & Decor, and Beauty & Grooming among the top 3 bought categories.



Top 10 Durables Owned

Washing Machine, Air Conditioners and Sofa among the top durables owned.



RAJASTHAN

Interaction with Digital Apps

Top 3 apps used in Rajasthan are Messaging Apps, Banking, and Delivery Apps.

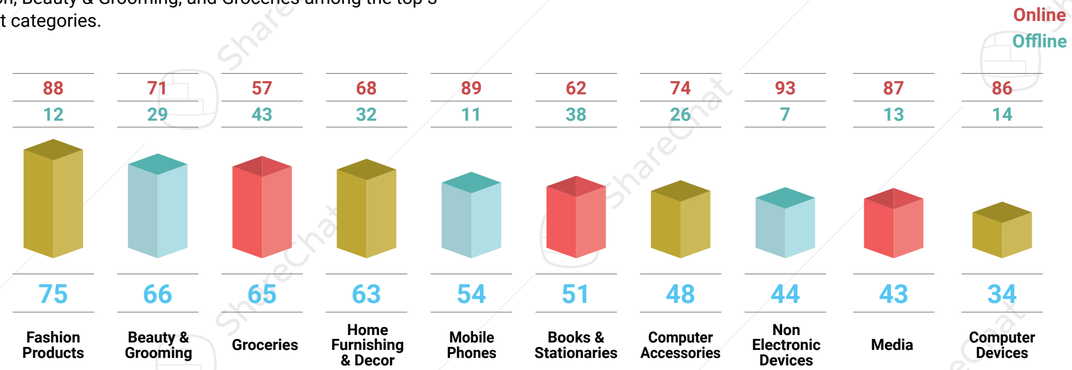
80% Messaging Apps

71% Banking Apps

68% Delivery Apps

Top Categories They Bought

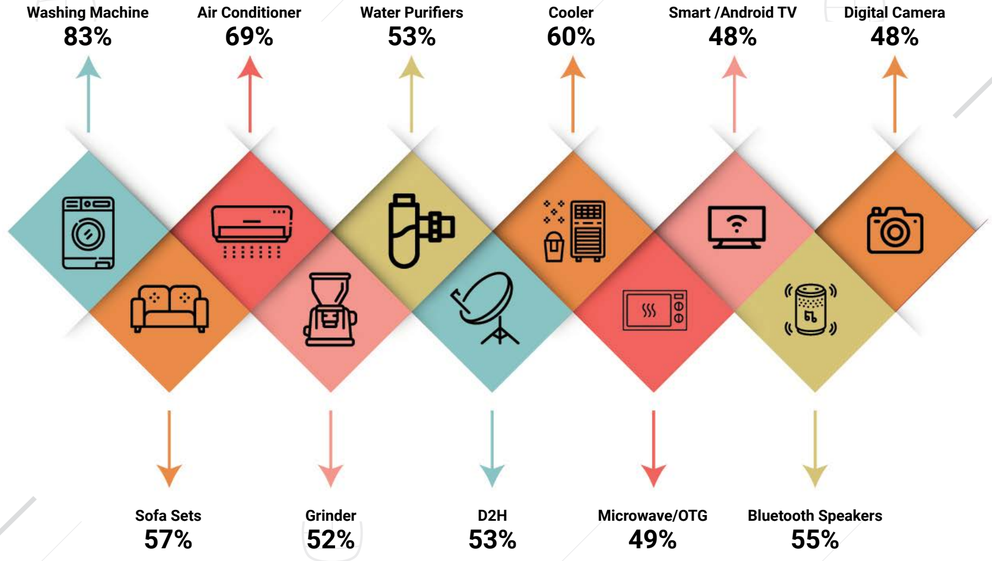
Fashion, Beauty & Grooming, and Groceries among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air Conditioners, and Cooler among the top durables owned



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

UTTAR PRADESH

Interaction with Digital Apps

Top 3 apps used in Uttar Pradesh are Messaging Apps, Banking, and Shopping Apps.

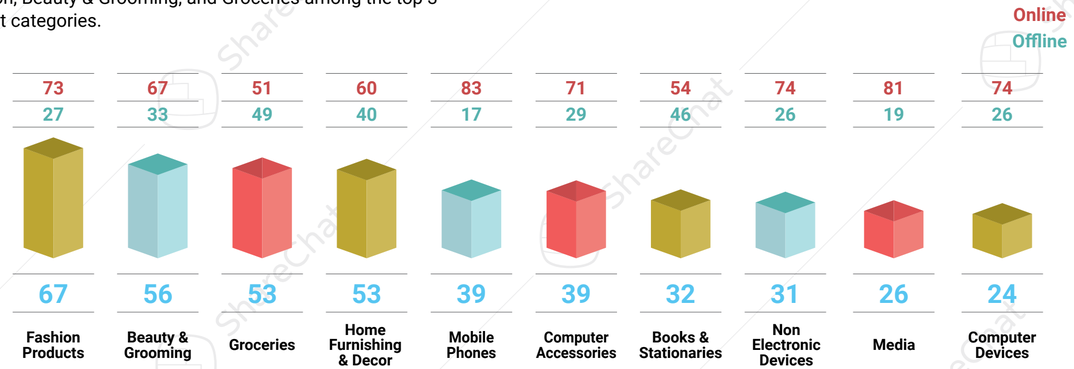
67%
Messaging Apps

59%
Banking Apps

58%
Shopping Apps

Top Categories They Bought

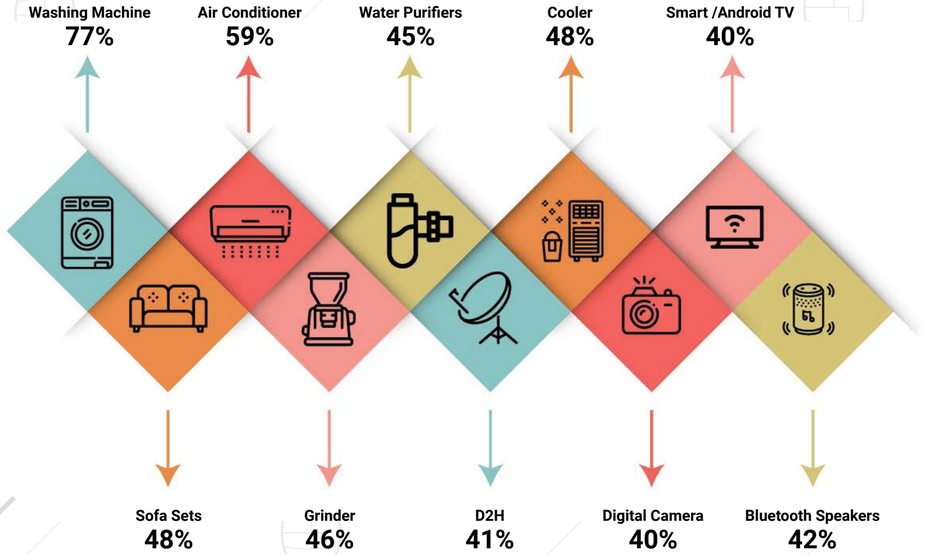
Fashion, Beauty & Grooming, and Groceries among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air Conditioners, Cooler and Sofa among the top durables owned



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

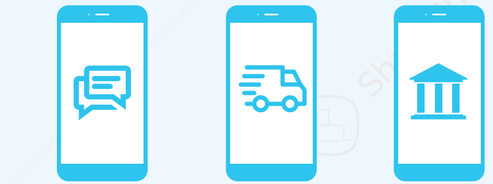
SOUTH

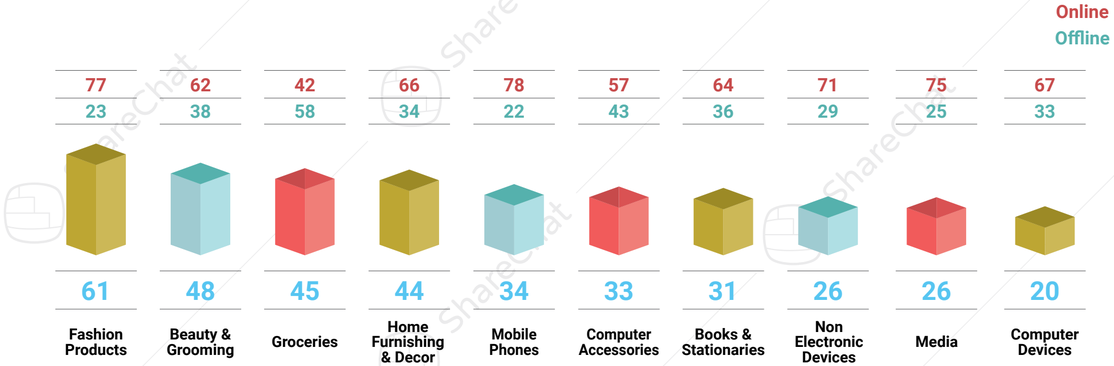
Interaction with Digital Apps

Top 3 apps used in South are Messaging Apps, Banking, and Delivery Apps.

Top Categories They Bought

Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.

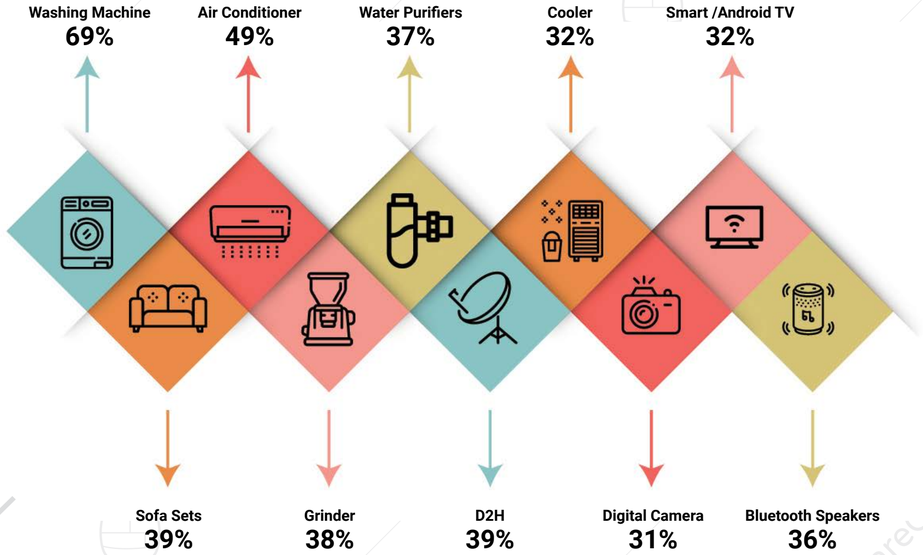




Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Sofa, Air Conditioners and DTH among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

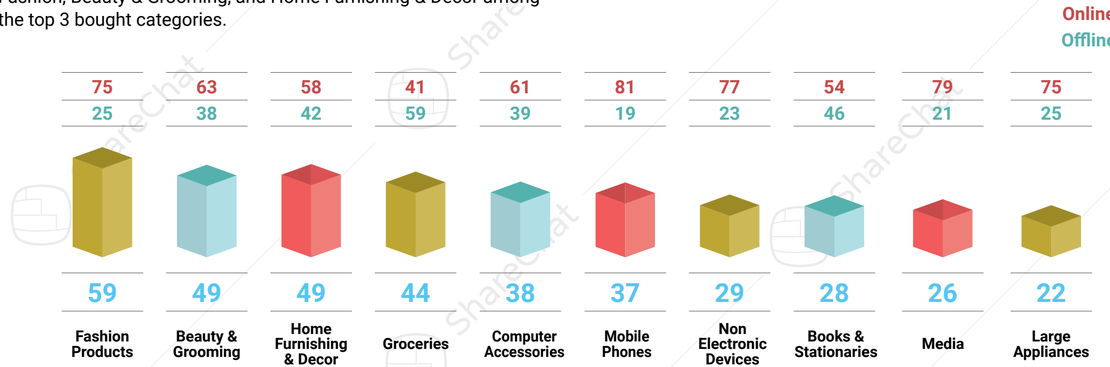
AP + TELANGANA

Interaction with Digital Apps

Top 3 apps used in AP and Telangana are Messaging Apps, OTT Platforms, and Banking Apps.

Top Categories They Bought

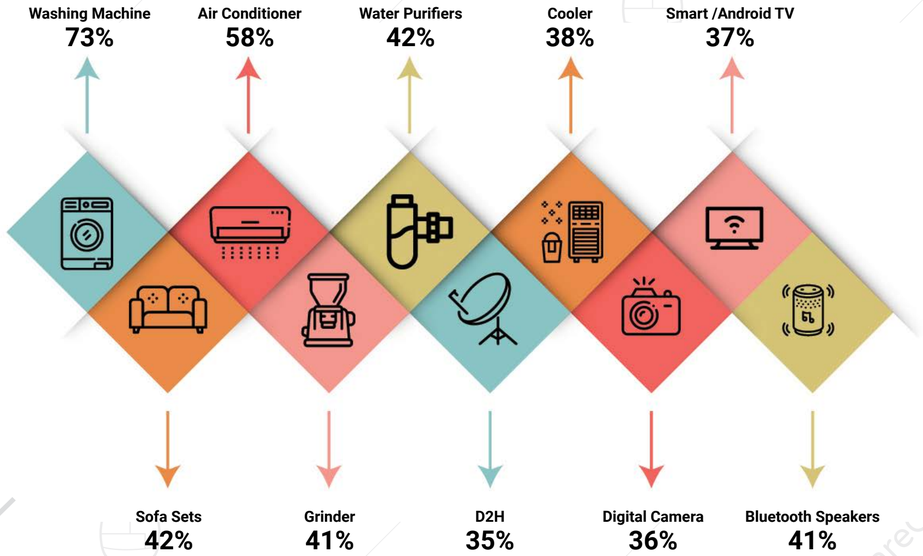
Fashion, Beauty & Grooming, and Home Furnishing & Decor among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, AC, Water purifier and Sofa set among the top durables owned.

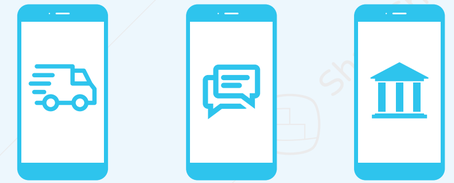


Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

KARNATAKA

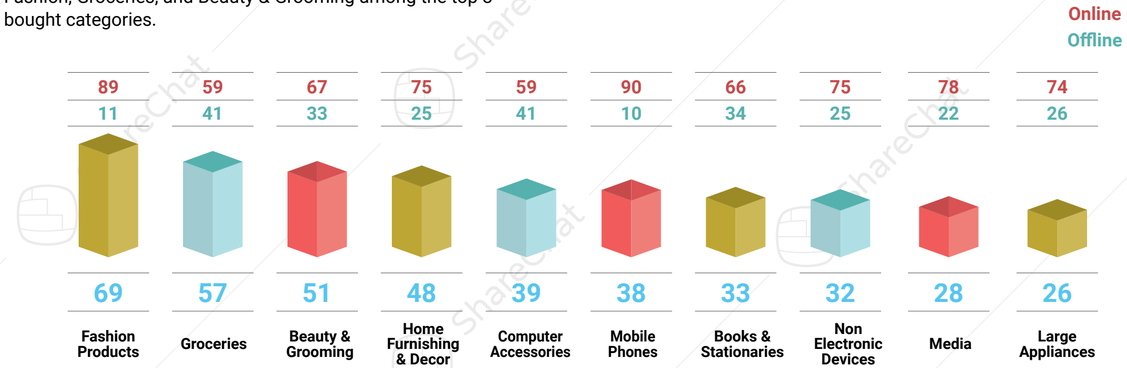
Interaction with Digital Apps

Top 3 apps used in Karnataka are Delivery apps, Messaging Apps, and Banking apps.



Top Categories They Bought

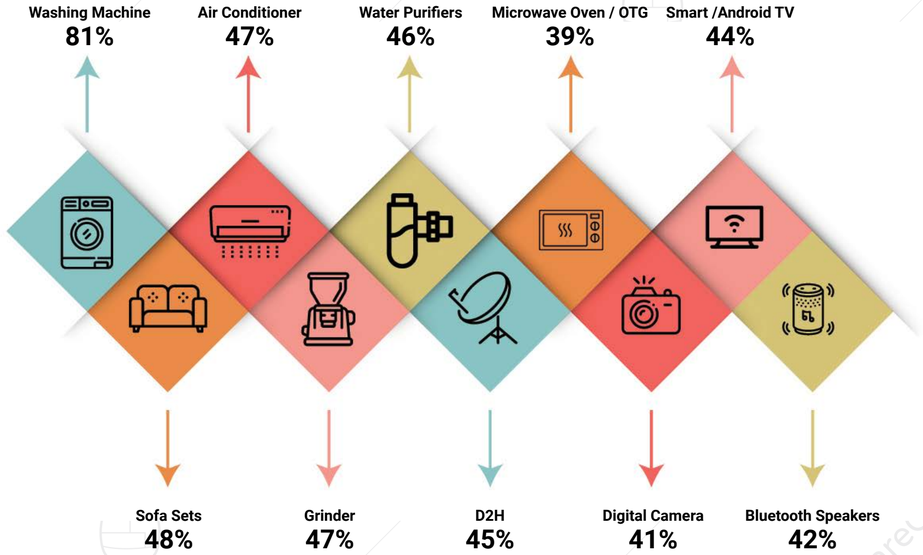
Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air Conditioner, Sofa set, and Grinder among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

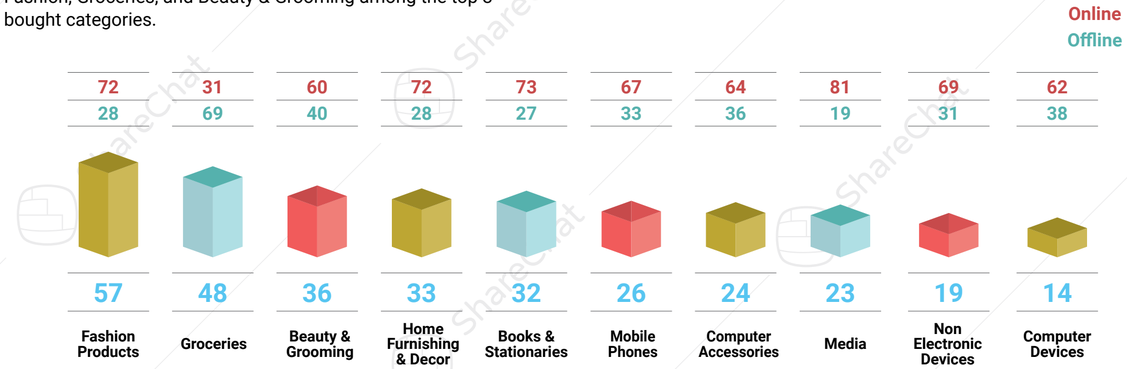
KERALA

Interaction with Digital Apps

Top 3 apps used in Kerala are Messaging, Banking Apps, and Shopping Apps.

Top Categories They Bought

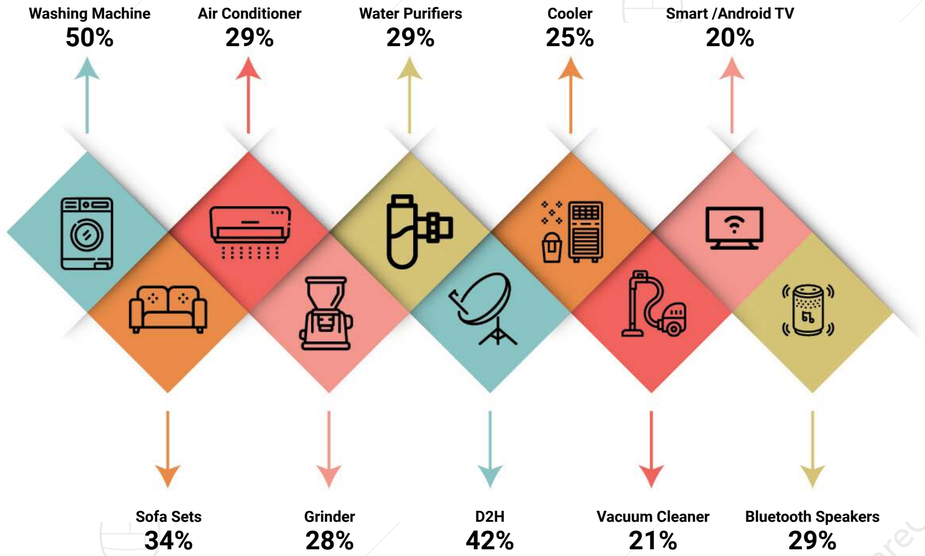
Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, D2H, and Vacuum Cleaner among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

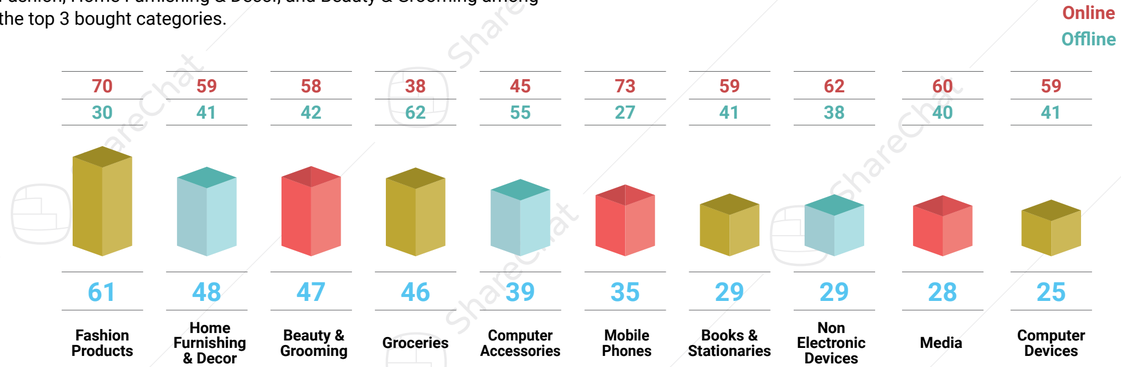
TAMIL NADU

Interaction with Digital Apps

Top 3 apps used in Tamil Nadu are Messaging Apps, Delivery Apps, and OTT Platforms.

Top Categories They Bought

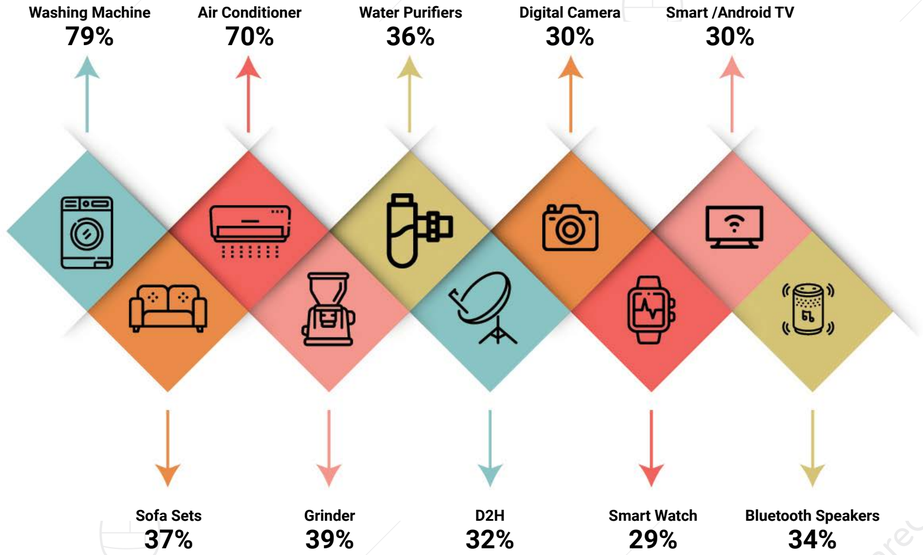
Fashion, Home Furnishing & Decor, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

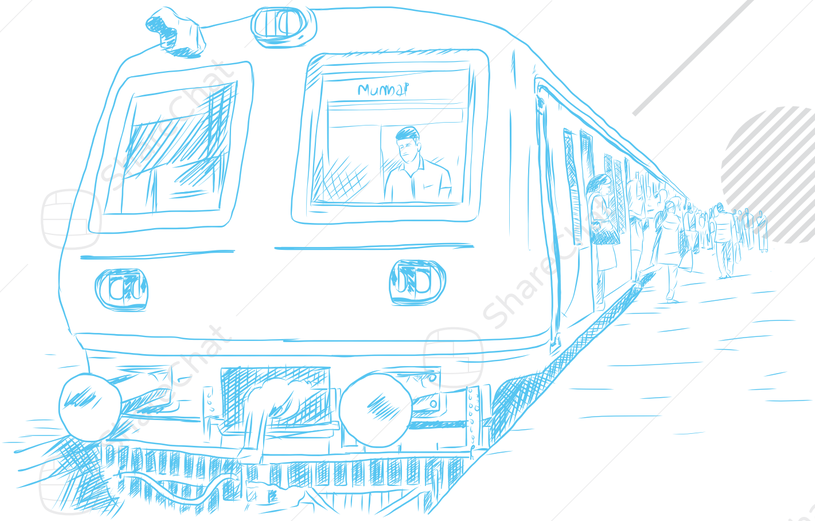
Top 10 Durables Owned

Washing Machine, Air conditioner, Sofa set, and Grinder among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

WEST



Interaction with Digital Apps

Top 3 apps used in West are Messaging Apps, OTT Platforms, and Banking Apps.

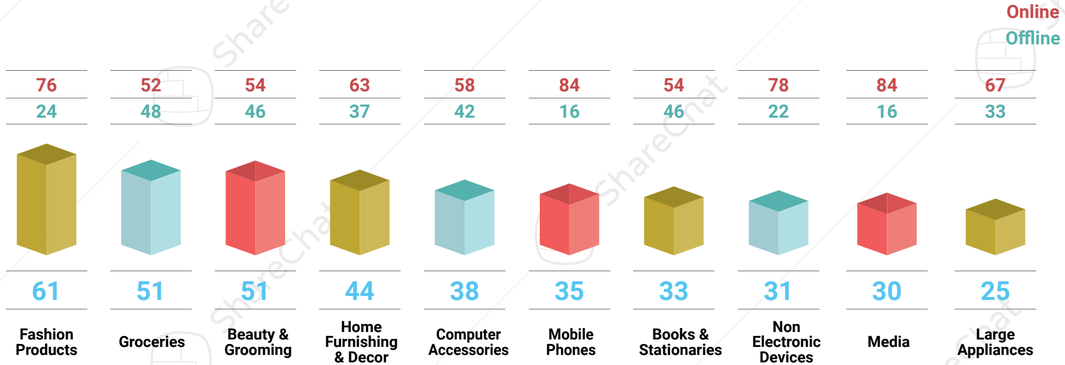
65%
Messaging Apps

55%
OTT Platforms

54%
Banking Apps

Top Categories They Bought

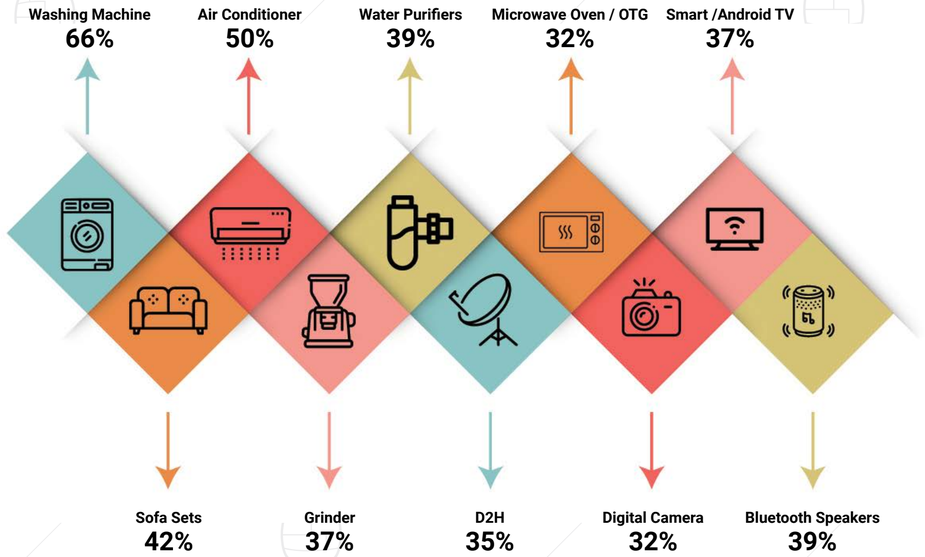
Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Air Conditioner, Sofa set, and Water Purifier among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

GUJARAT

Interaction with Digital Apps

Top 3 apps used in Gujarat are Messaging Apps, Banking, and Entertainment Apps.

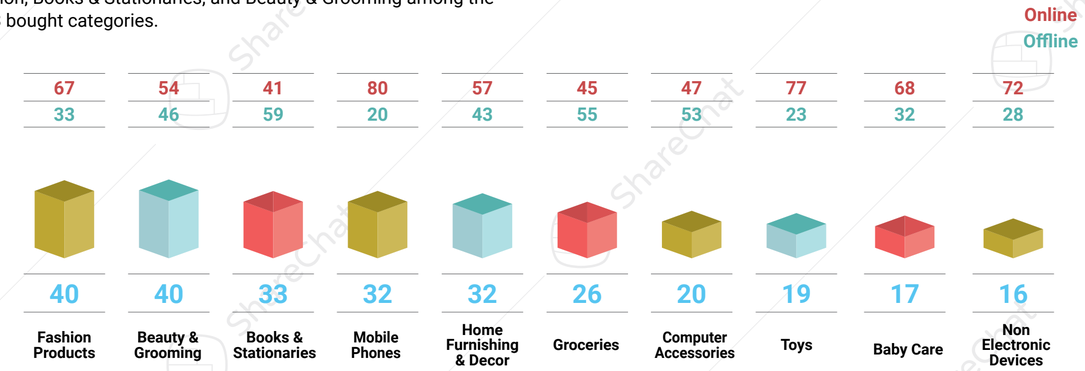
56%
Messaging Apps

54%
Banking Apps

49%
Entertainment

Top Categories They Bought

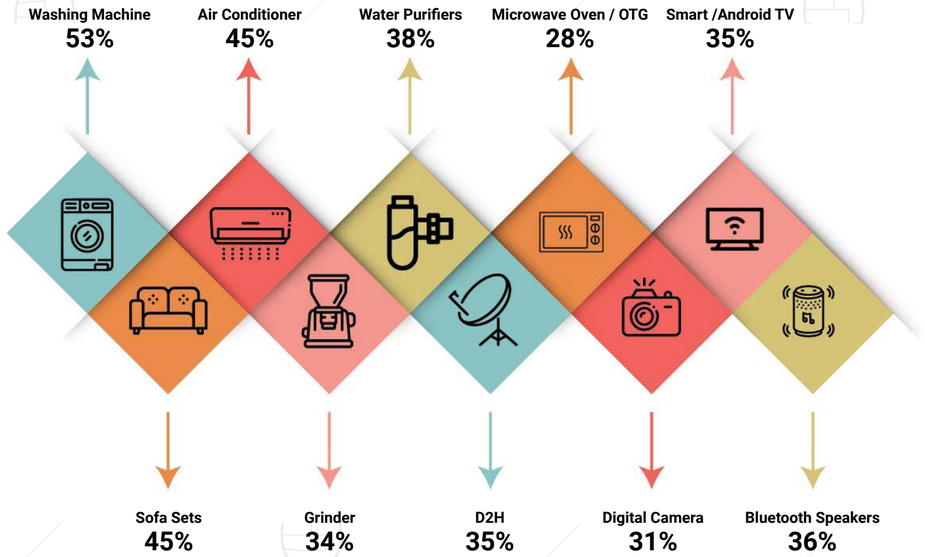
Fashion, Books & Stationaries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Sofa, Water Purifiers and Air Conditioners among the top durables owned.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

MAHARASHTRA

Interaction with Digital Apps

Top 3 apps used in Maharashtra are Messaging Apps, OTT Platforms, and Browsers.

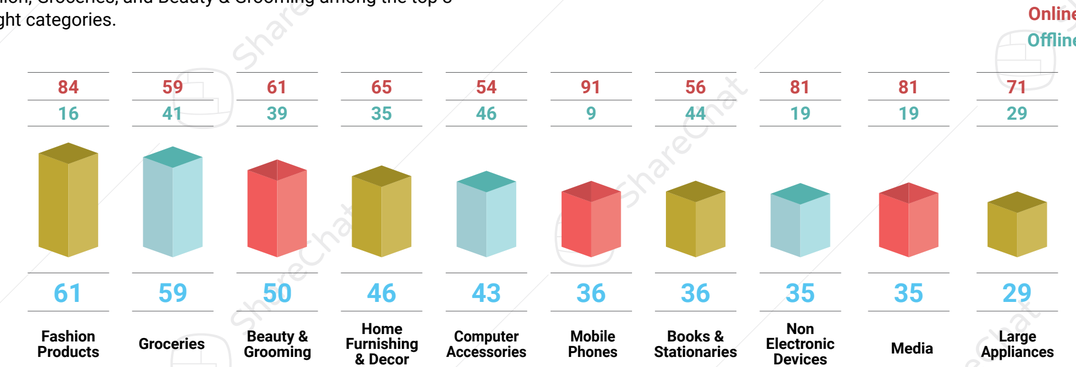
68%
Messaging Apps

61%
Browsers

60%
OTT Platforms

Top Categories They Bought

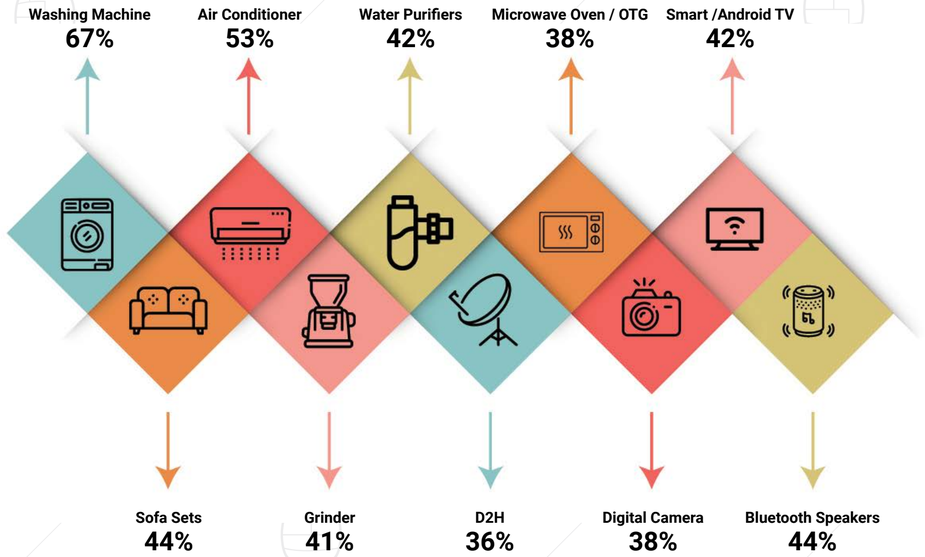
Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

Top 10 Durables Owned

Washing Machine, Sofa, Water Purifiers and Air Conditioners among the top durables owned.

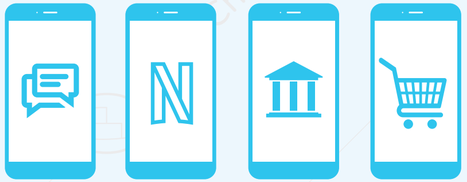


Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]

MADHYA PRADESH

Interaction with Digital Apps

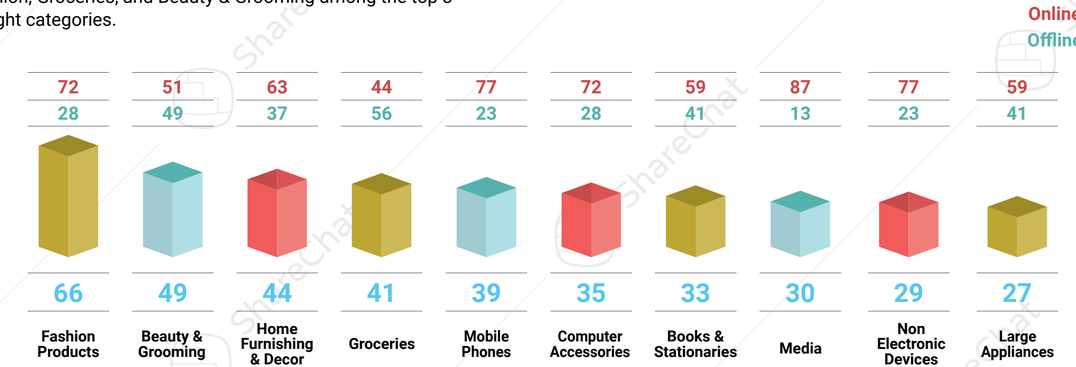
Top 3 apps used in Maharashtra are Messaging Apps, OTT Platforms, Banking, and Shopping Apps



67% Messaging Apps | 57% OTT Platforms | 51% Banking Apps | 51% Shopping Apps

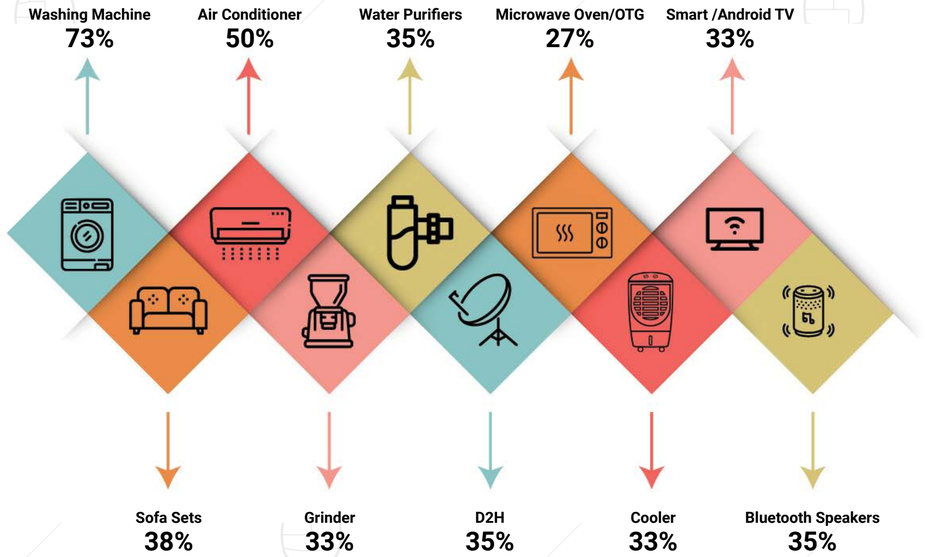
Top Categories They Bought

Fashion, Groceries, and Beauty & Grooming among the top 3 bought categories.



Top 10 Durables Owned

Washing Machine, Air Conditioners, and Sofas among the top durables owned.



Please Note

- Nielsen does not endorse any client claim or this report. Nielsen is an independent research agency and has undertaken the research for this particular project based on the brief received by Mohalla Tech Private Limited. Nielsen cannot support or advise on advertising or marketing campaigns or slogans or similar public disclosures.
- Any citation to research must include the following:"Mohalla Tech Private Limited claim based on research conducted by Nielsen, [3788, Male:Female::71:29, NCCS A:B::71:29]."
- Information provided by Nielsen is primarily designed for Mohalla Tech Private Limited internal use. We consent the use of the results referenced in this letter in an advertisement or public communication only and on the condition that Mohalla Tech Private Limited indemnifies and holds harmless Nielsen and Nielsen's affiliates and their respective officers, directors, shareholders, members, agents and employees against all claims, damages, loss or expenses (including attorneys' fees) arising from Mohalla Tech Private Limited disclosure of information related to the survey.

શેરચેટ
ભારતનું પોતાનું સોશિયલ મીડિયા

ಷೇರ್‌ಚಾಟ್
ಇಂಡಿಯಾಸಿನೇ ಸೋಶಿಯಲ್ ಮೀಡಿಯಾ

ഷെയർചാറ്റ്
ഭാരതത്തിന്റെ സ്വന്തം സോഷ്യൽ മീഡിയ

ଶେୟରଚେଟ୍
ଭାରତର ନିଜସ୍ୱ ସୋସିଆଲ ମିଡିଆ

ਸ਼ੇਅਰਚੈਟ
ਭਾਰਤ ਦਾ ਆਪਣਾ ਸੋਸ਼ਲ ਮੀਡੀਆ ਐਪ

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