



TECHSci RESEARCH
from NOW to NEXT

Consumer

LIFESTYLE TRENDS

Today - Tomorrow



INDIA is a logistical Night-mare

Population

700+
Districts

Growth Rate of 7-8%

To understand the future trends of this economy
TechSci has conducted research across **45500 households.**





Research Methodology & Data Collection – 1/2

TechSci has commissioned this study and covered

45500 households

across the country. The sample has been drawn basis location, demographic distribution, household type.

Household Type

A household should have atleast

1 parent, 1 kid/teenager & 1 Senior citizen

The Establishment Study (as well as the Panel) cover all parts of India except certain geographies that are unreachable due to harsh terrain, distance or areas with political unrest and safety concerns to field workers.

The data has been collected from
994 Towns & Villages

which includes

Metros(8),

Towns(370)

and Villages(616)

of all pop strata.

The data collection period

was from Aug-Oct.

Research Methodology & Data Collection - 2/2

- The data has been collected through CATI post physical empanelment of the household.
- The field executive visited the HHD (household) sample location assigned by TechSci Research, explains the purpose of the study and then seeks consent from the chief wage earner and householder for empanelment.
- Our proprietary software links the smartphone that the field executives carry to the server through VPN.
- Automated validation checks enabled the data collection smooth & hygienic. However, stringent quality checks were conducted on the collected Raw files to ensure quality of data.



Questionnaire

1. What is your last annual household income as per ITR 2017-18?
2. How much did you save last year?
3. How many earning members are there in your family? Is income coming from other sources as well?
4. Can you list down percentage share you spend on below categories – Details mentioned in later slides



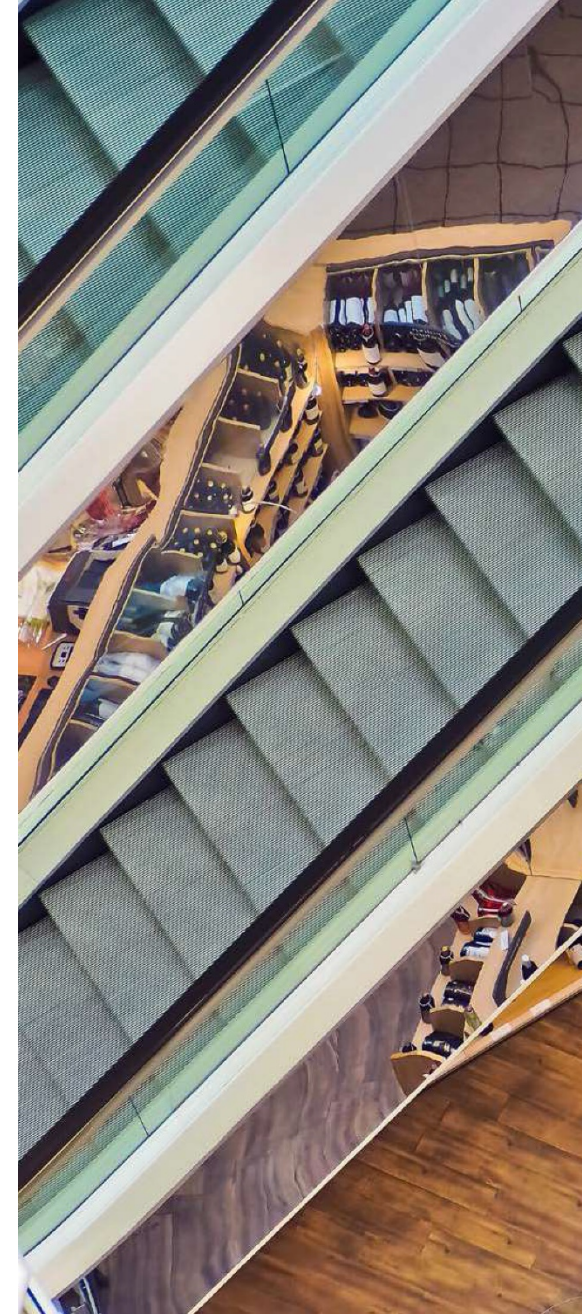


Sectors Covered – 1/3

TechSci Research's most recent consumer survey in India studied consumption in 11 major categories.

Definition:

1. Consumer Durable
 - TV – All TV Sets including Color TV, HD, 4K
 - Consumer Electronics - AC, Washing Machine, Water Heaters & Coolers
 - Home Appliances – Including Kitchen appliances
 - Refrigerator
 - Fast Moving Consumer Electronics – PC, Speakers, Headphones
2. Vehicle
 - 2 Wheeler – Scooter, Mopeds, Scooty, Bike
 - 4 Wheeler – Cars, Jeep, SUV
3. **Mobile Phones**
 - Smartphone
 - Feature Phone
4. **Apparel & Accessories (Fashion industry)**
 - Men's Wear Garments
 - Women's Wear & Kids wear Garments
 - Accessories (Socks, Wallet, Tie, Belt, Shoes, Watch)



Sectors Covered – 2/3

5. FMCG

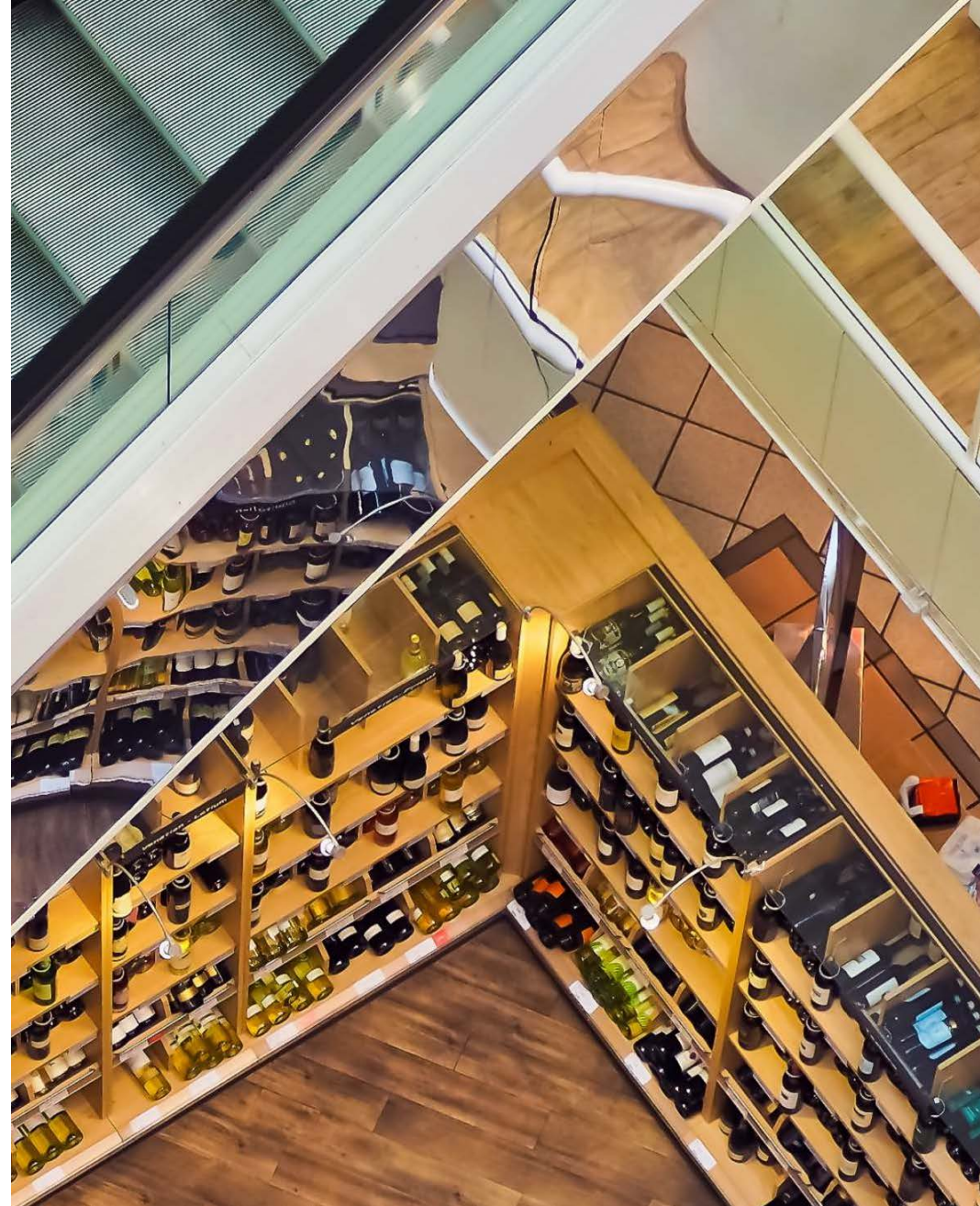
- Personal Care (Including Soap, Shampoo, Deo..)
- Household Care (Including Phenyl, Detergent..)
- Beverages (including non alcoholic drinks)
- Dairy Products (Including Milk, Paneer, Cheese..)
- Packages Food (Including Spices, Savories, Bakery, Biscuits...)
- Fresh Produce (Including Fruits, Vegetables & Meat, Fish....)

6. Travel

- Bus (Local & Domestic)
- Train (Metros, India Railways)
- Air (Domestic & International)

7. Bill Payments

- Phone Bill (Landline & Mobile)
- Electricity Bill
- Municipal Corporation Bill
- Water Bill



Sectors Covered – 3/3

8. Entertainment

- Movies & Theaters
- Live Plays
- Live Shows
- Seasonal Games (Cricket, Kabbadi, Football, Racing Cars/Bike)

9. Education

- Basic Education
- Graduation
- Post Graduation

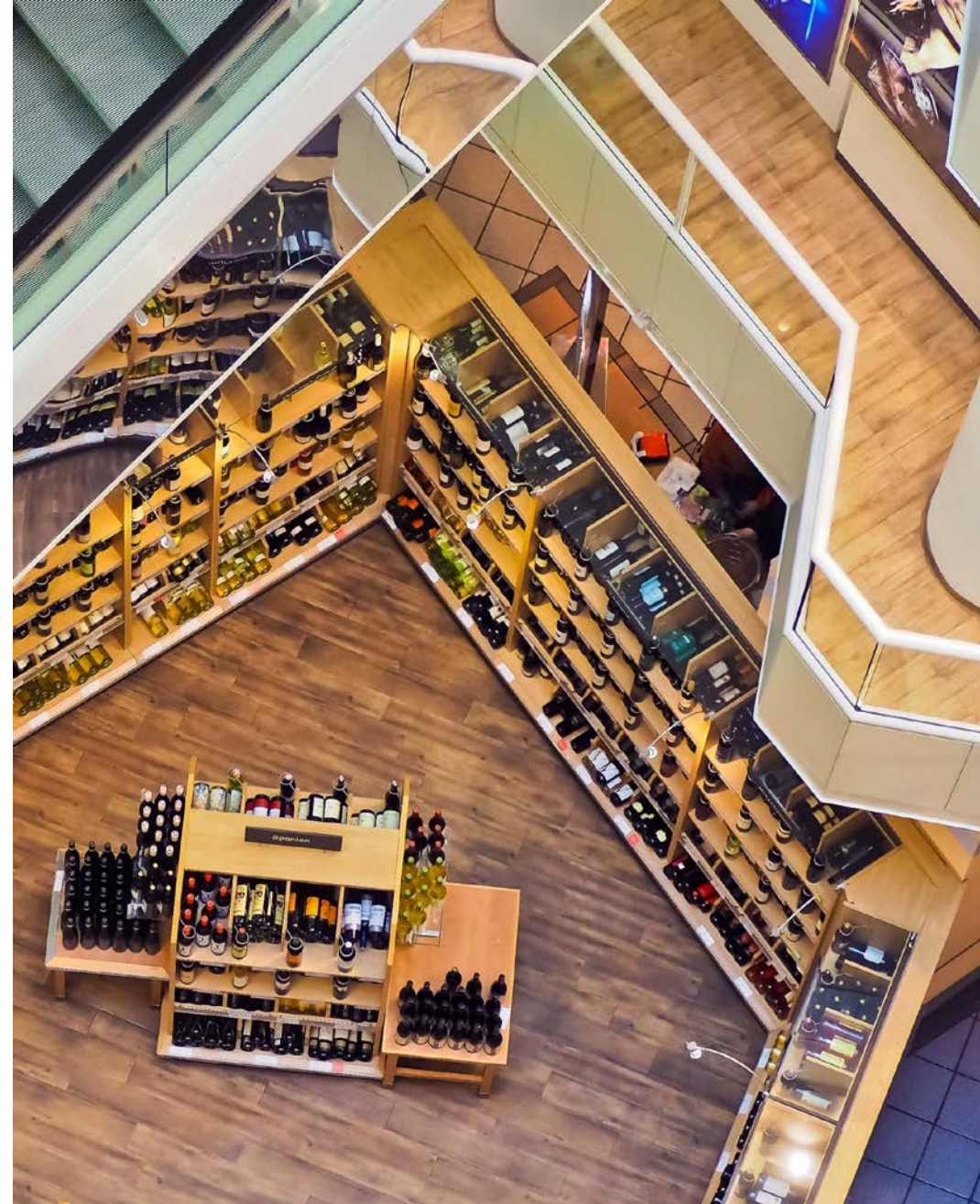
10. Healthcare

- Medicine
- Hospital

11. Insurance Premiums

- Life, Accident, Health, Travel, Smartphone, Agriculture

12. Rent



Consumer – Average Monthly Per Capita Expenditure

■ 2011 ■ 2018 ■ 2023



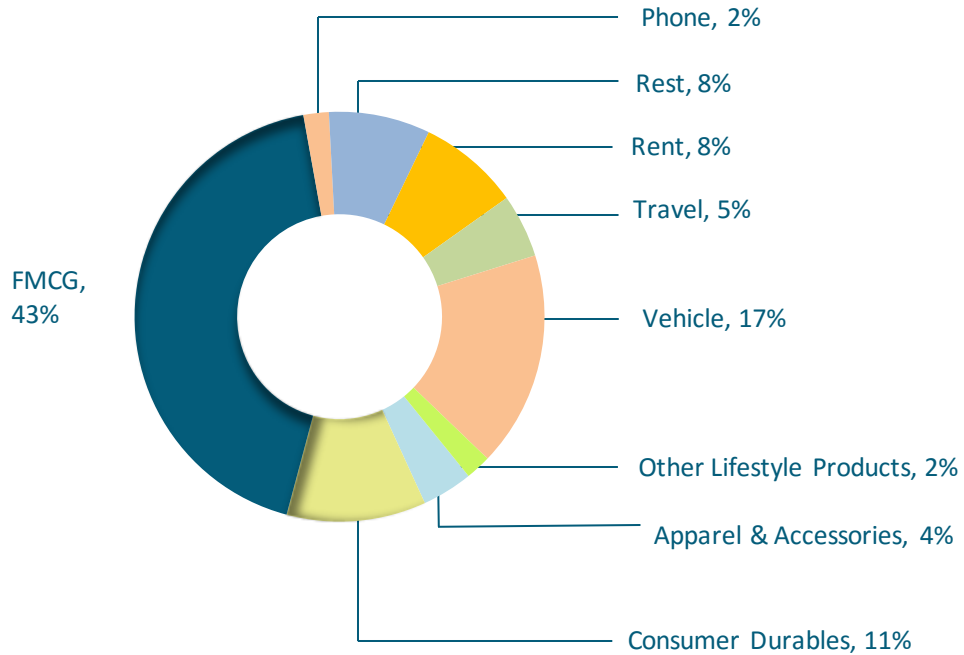
Metros

Rest Urban

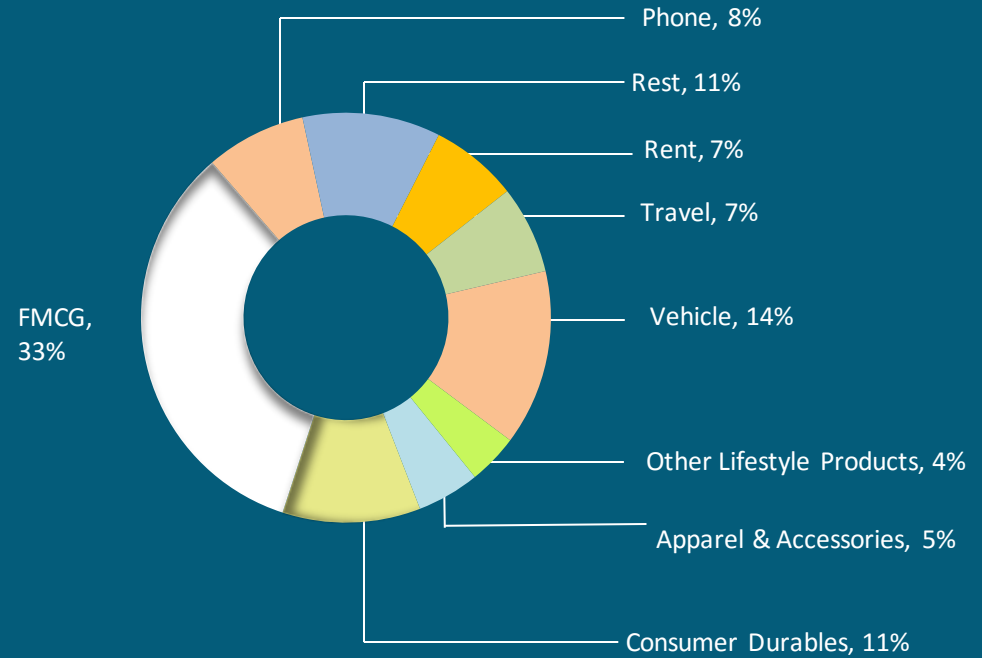
Rural

What has changed in 7 Years?

Average House hold Spends



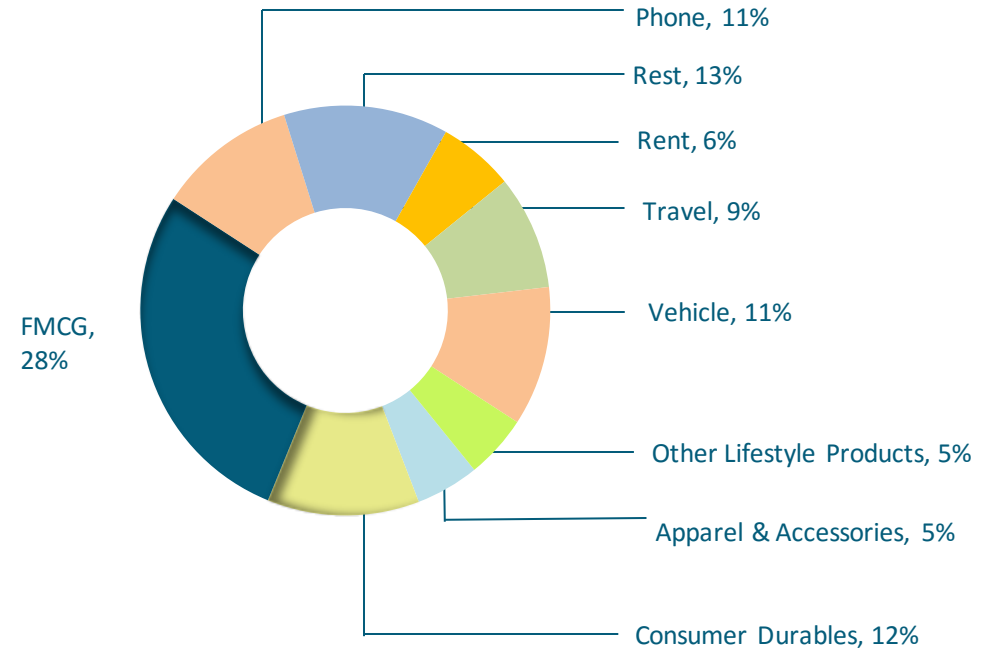
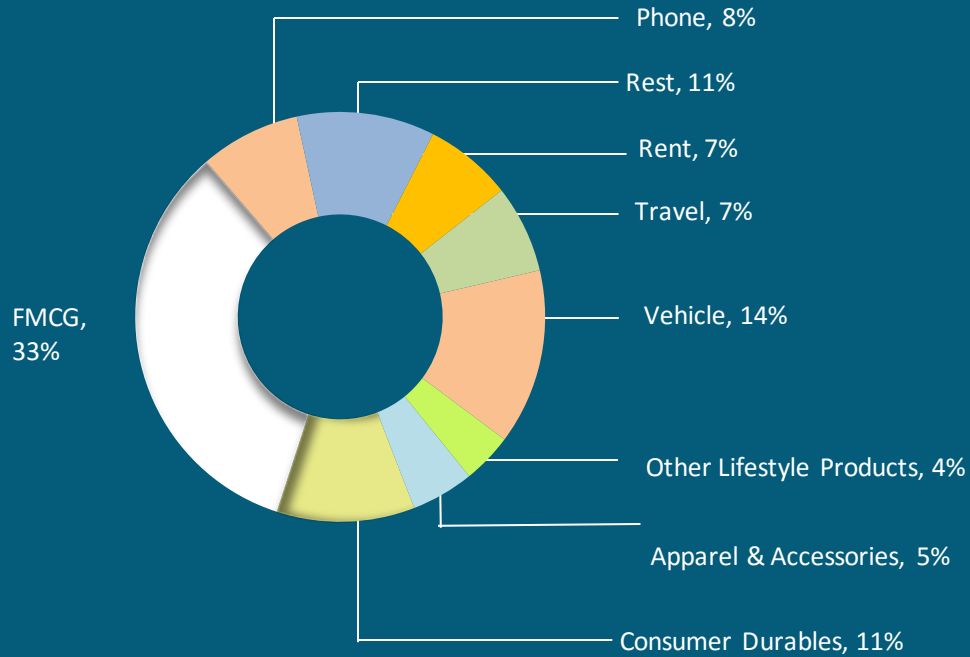
2011



2018

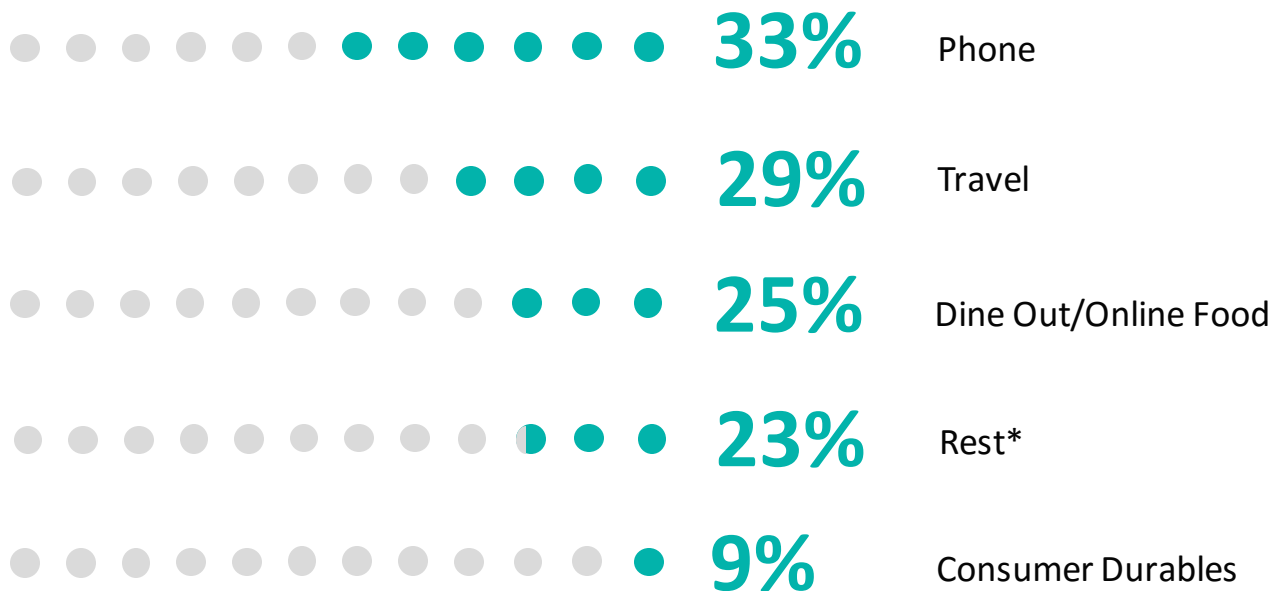
What will change in 5 Years?

Average House hold Spends



2018 2023

Most Promising Sectors - 2023



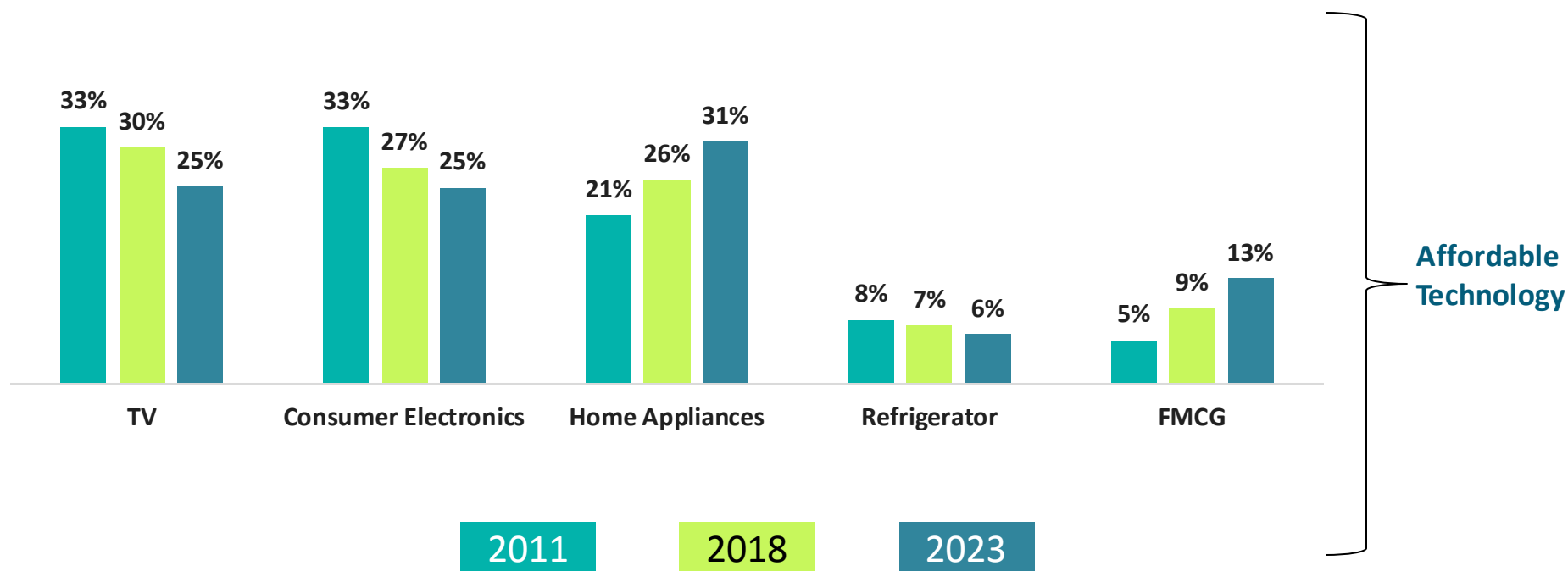
*Insurance Premiums, Recharges,
Healthcare, Entertainment,
Education





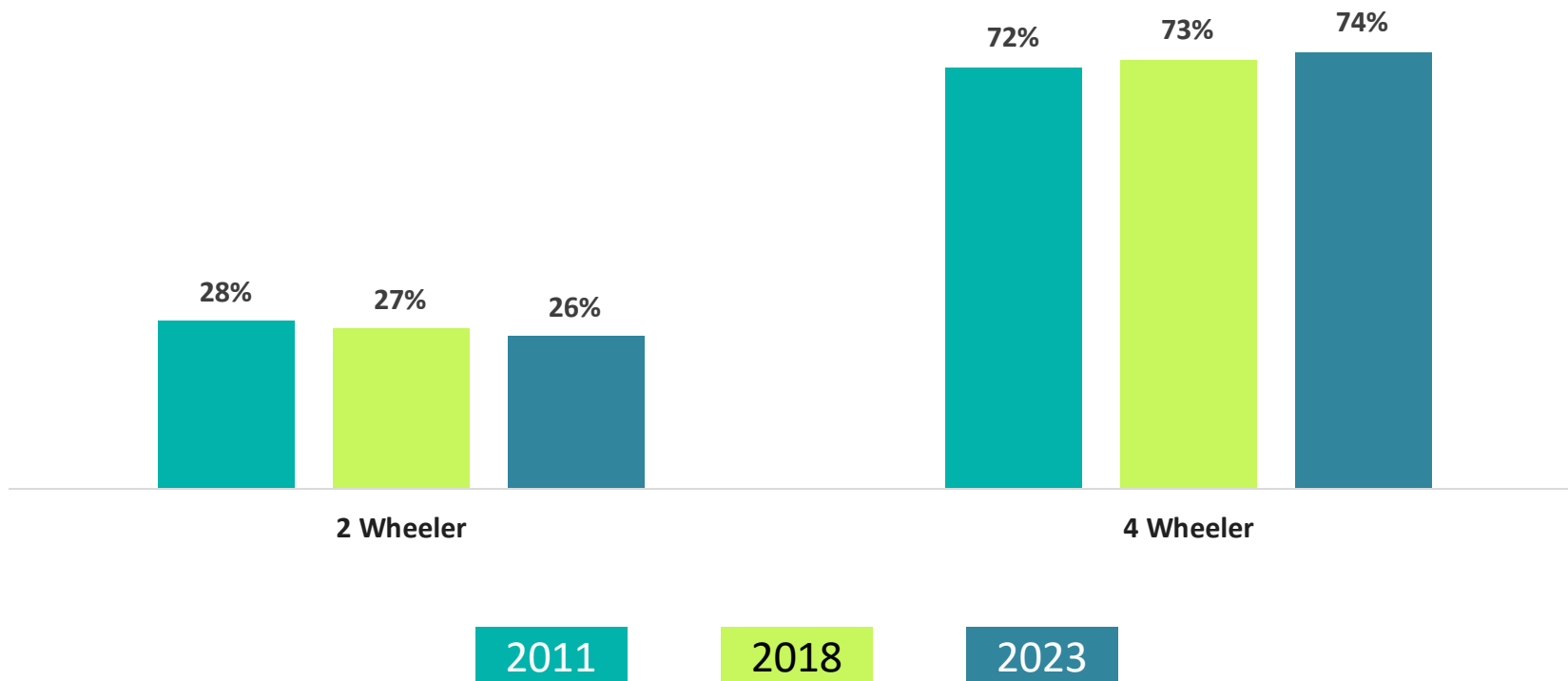
SEGMENT BREAK-UP

Consumer Durables - Share of Wallet



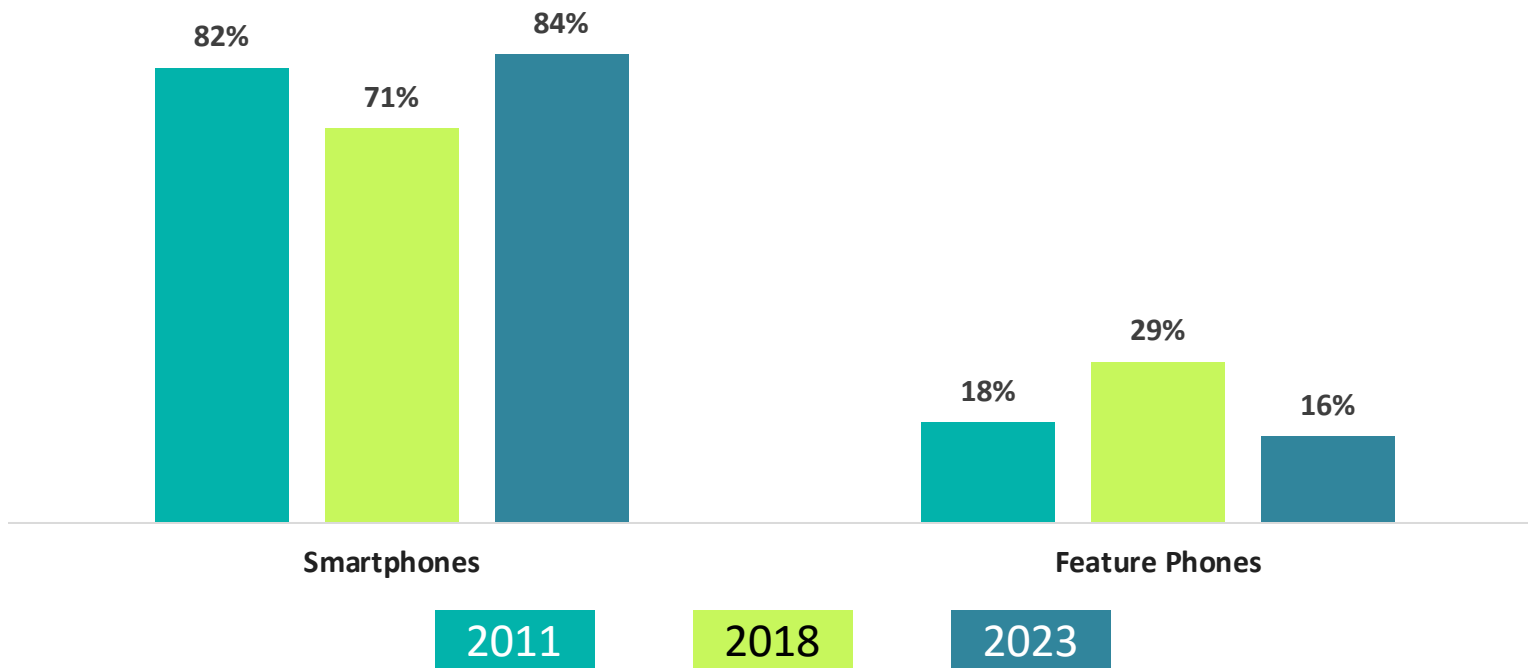
India is becoming Tech conscious market. The reach of consumer durables market have increased from **33% to 46%**

Vehicle - Share of Wallet



2 Wheeler (Scooter, Bike etc) & 4 Wheeler (Car, Jeep etc) market will be very competitive with growing Pre owned vehicle.

Mobile Market - Share of Wallet



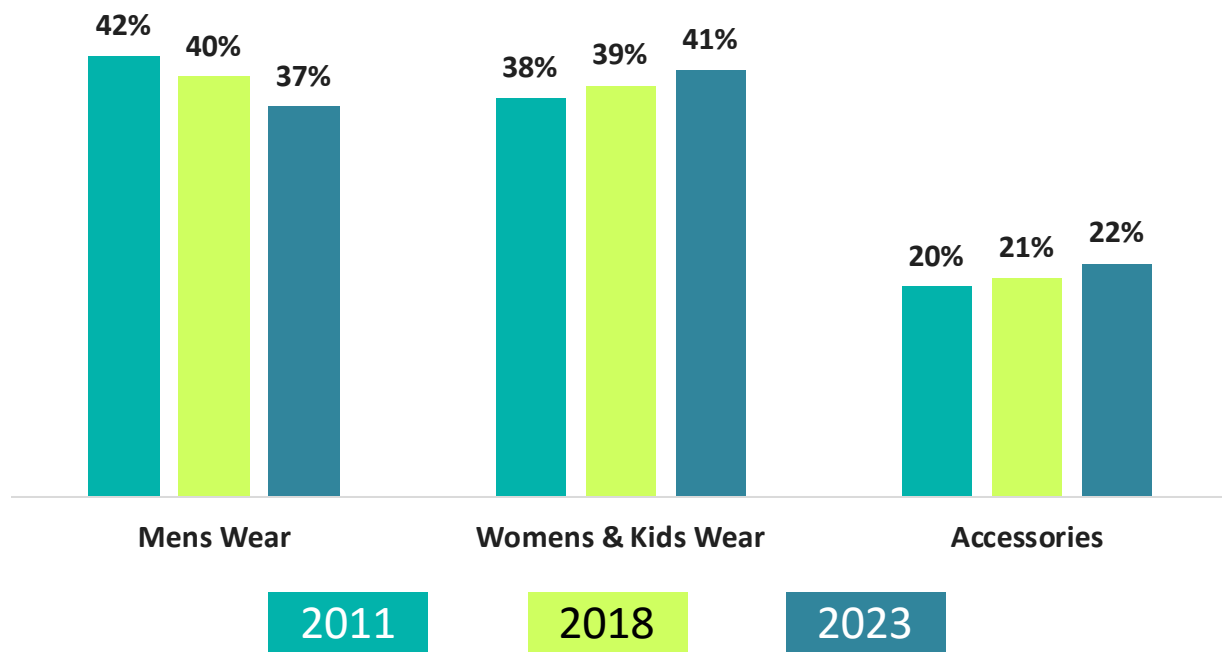
Feature phones market has increased due to Jio

64% of the respondents are aware of the latest 5G technology.

28% of Indian consumers (Rural & Urban) are willing to shift to 5G in first month



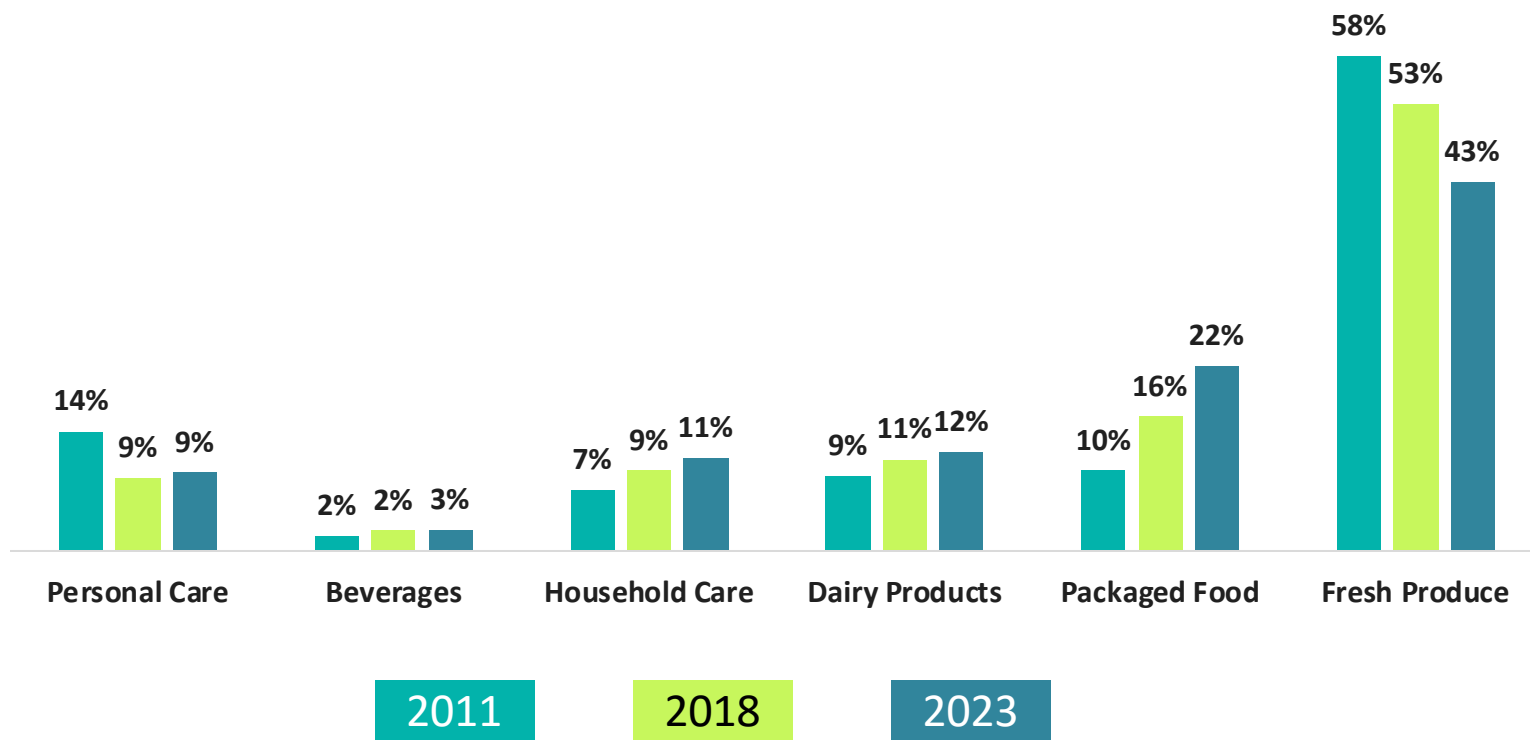
Apparel/Accessories - Share of Wallet



70% of the market is still unorganized, and expected to shrink to 57%,
Women's wear will take the major share in Apparel sector.

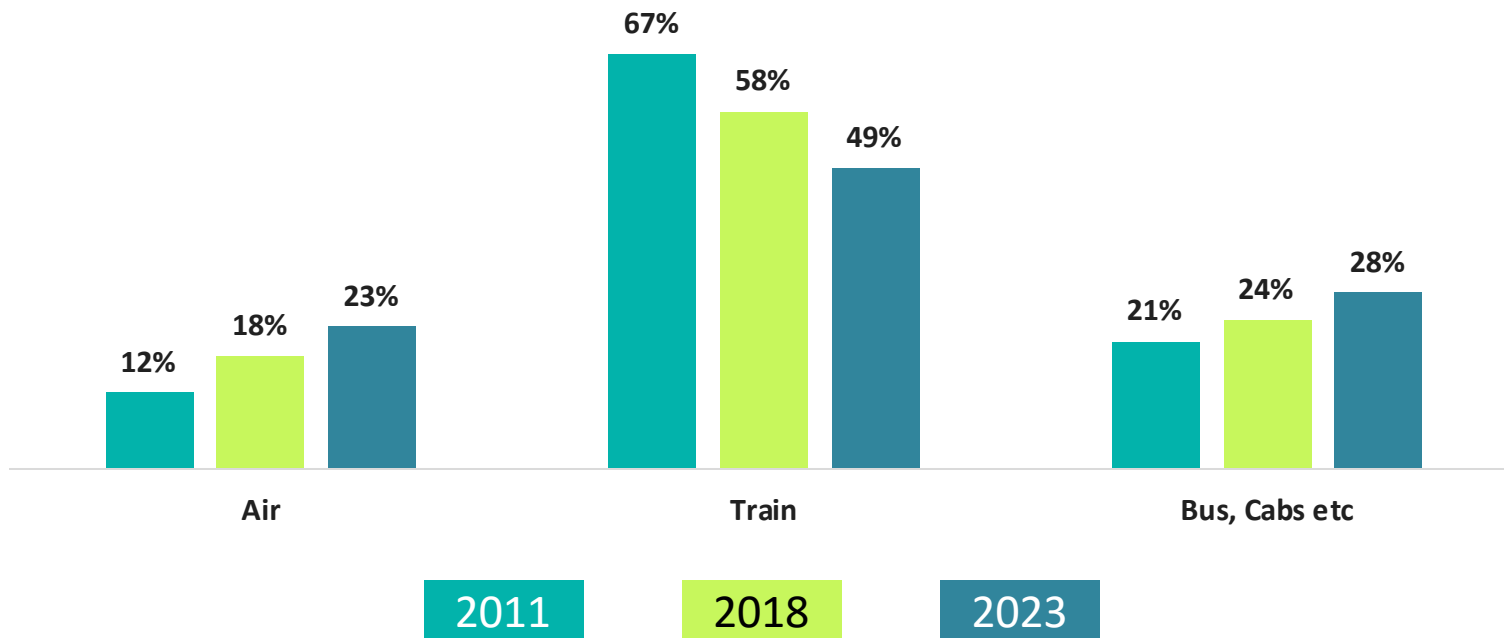
Whopping online sales, biggest gainer from increasing online trends. 'Brands' have built through online succession.

FMCG - Share of Wallet



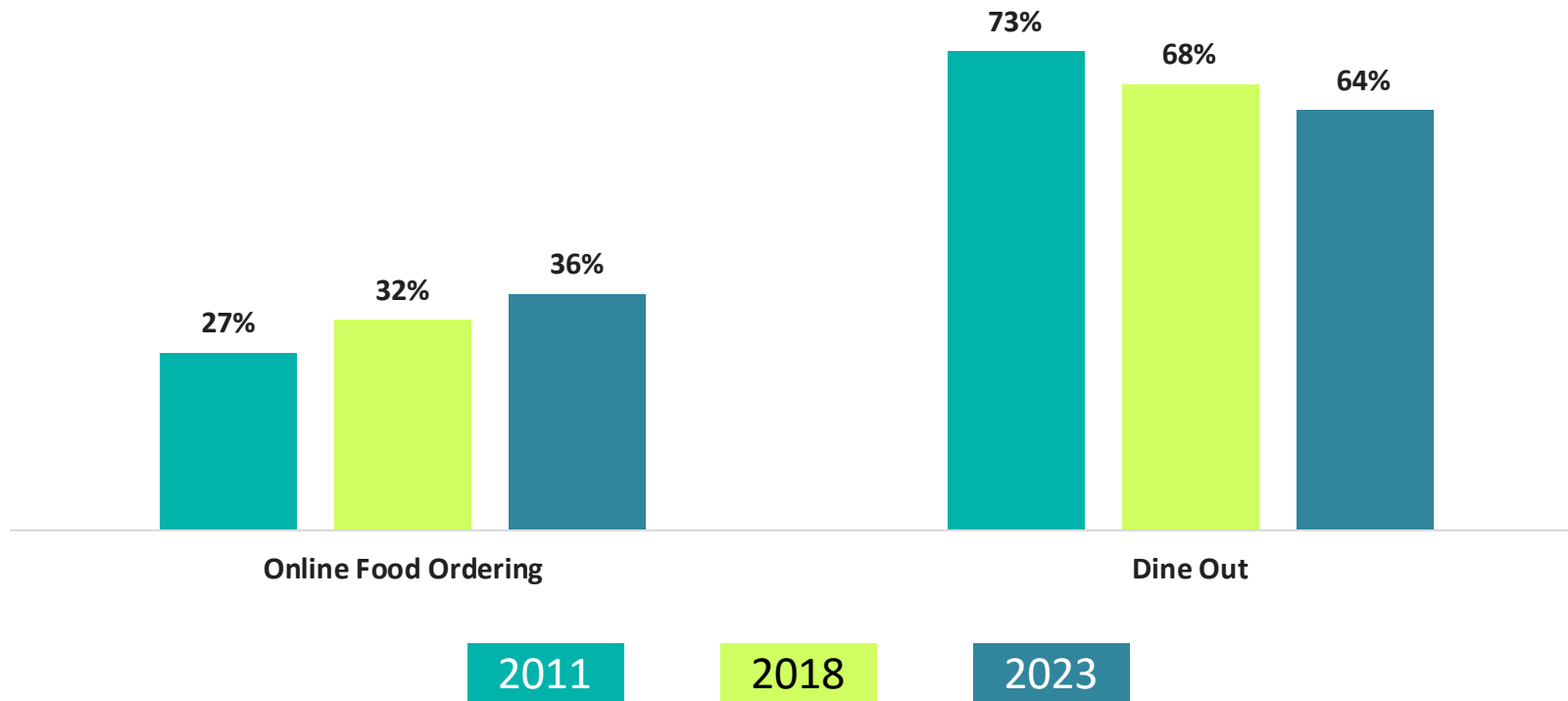
Reverse Trend - Perceived high-quality products are being considered in Rural India whereas Herbal Wave (Low cost products) are being considered by Urban India. Patanjali's 70% revenue comes from Urban India

Travel - Share of Wallet



Travel takes the priority for almost 50% of Millennials, who spend more than ₹15,000 on travel in a year. International destinations are becoming priority of Millennials while weekend getaways are must for centennials.

Out of Home Food Trends - Share of Wallet



31% of urban respondents claimed that they dine out once a month
Trending messages going to consumers in form of Innovative advertisements



TechSci Research – North America
708 3RD Avenue, 6th Floor, New York,
NY, United States, 10017
Tel: +1- 646- 360-1656
E: sales@techsciresearch.com

TechSci Research – Europe
54, Oldbrook, Bretton,
Peterborough,
United Kingdom
E: sales@techsciresearch.com

TechSci Research – Asia-Pacific
B-44, Sector -57, Noida, National
Capital Region, U.P. India
Tel: +91-120-4523900
E: sales@techsciresearch.com

www.techsciresearch.com

INDUSTRY ASSOCIATIONS



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THANK YOU