

A stylized illustration of a diverse group of Indian people, including men and women of various ages and ethnicities, rendered in a simple, line-art style. The illustration is positioned at the top of the cover, behind the title text.

Understanding Indian Consumers

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Preface

This book is a fascinating blend of papers from industry practitioners and academia. Research, advertising and marketing practitioners have attempted to distil their learning over the years into succinct chapters. Eminent faculty from academia have brought together theoretical frameworks, research and case studies to show how these could inform brand and business strategy decisions.

Consumers are rapidly shifting in behaviour and attitudes. One has only to study the disruptive influence that digital technology has had on how consumers shop, consume media, learn, network with others or execute financial transactions, to know that we constantly have to unlearn the old and reskill for the future. And we should expect further disruption from newer technologies such as the Internet of Things, Artificial Intelligence and Virtual Reality. This book, using case studies, data on shifts from the past, discussion questions on today's world leading to a discussion of the future, hopes to build a mindset that seeks answers by questioning and challenging the approaches of the past. This is a book for self-directed learning. It presents ideas and concepts; it encourages you to reach your own conclusions and is not prescriptive.

The book is aimed at the serious student of marketing in an MBA programme as well as brand and marketing managers who are looking to learn from different but analogous situations, refresh their theoretical grounding and also get some easy how-to guidelines and practical insights.

Understanding Indian Consumers is wide-ranging in content.

Chapter 1 provides a qualitative understanding of Indian youth, their values, attitudes and lifestyle gleaned from years of qualitative research among Indian consumers. The author argues that a good understanding of these attitudes will help in crafting effective communication that taps into emotion, delivering impact as well as longevity of campaigns.

Chapter 2 traces the journey of the Indian woman over the last decade using proprietary databases, Kantar IMRB's TGI service and Kantar Worldpanel as well as information available through the Census of India. It tracks the gradual transformation of the roles of the woman as daughter, wife and mother.

Chapter 3 describes how firms are profiting by solving problems of rural communities—their need for information, tapping into their desire for change, extending to new markets by using the benefits of a sharing economy, and using mobile and digital technologies to deliver effectiveness at lowest cost of operation.

Chapter 4 examines how the concept of Nation Equity has implications for how India and its products are perceived. It discusses how India can build its Nation Equity by highlighting its Performance Equity and emphasizing competence-related halo where a generalized perception of competence is transferred to specific products.

Chapter 5 begins by outlining the five stages of innovation framework that serve as a platform for strong innovation. Using the findings from Nielsen's Breakthrough Innovation study, it identifies the best route to drive a strong innovation culture in an organization.

Chapter 6 discusses how consumers' mindset about change (fixed vs. growth) can influence the way they process advertising messages, perceive brands, receive innovation or new products and services and use social media. The author explores how implicit mindsets about change provide

an opportunity for marketers to enhance engagement, and persuade and influence consumer choices.

Chapter 7 explores how two fundamental cultural orientations, analytic-holistic thinking and independent-interdependent self-construal, have consequences for information processing, decision-making, context effects, branding, brand relationships, reactions to contradictory information and forgiveness. It discusses implications of these cultural frameworks for marketing strategies in India.

Chapter 8 looks at the relevance of cultural orientation frameworks—individualism-collectivism and horizontal-vertical society for India. It discusses two modes of persuasion appeals—cognitive and emotional. Since Indian consumers are impacted by both indigenous and western cultural norms, the chapter develops a persuasive appeals framework that incorporates both of these influences.

Chapter 9 examines how memory reconstruction errors are caused by source confusion and motivated distortion. Consumers may alter information or may even create new fake memories as they do not save exact events and experiences as memories. The chapter discusses legal implications and future directions in this research domain.

Chapter 10 discusses the positive and negative outcomes of being beautiful. It highlights the relevance and opportunities for beauty products in Indian market at consumer and managerial level.

Chapter 11 discusses the unique pattern of obesity in India, which is in contrast to that of developed countries like USA. This is explained by several socio-economic and distinct cultural factors. The chapter also discusses strategies to promote and manage a healthy lifestyle.

Chapter 12 brings to light the distinctive characteristics of luxury consumer of contemporary India and discusses opportunities and challenges of luxury brands in India. It gives novel managerial insights for branding luxury products in India.

Chapter 13 discusses the relationship among dimensions of social stratification and influences of status inconsistency on consumer behaviour. By consuming dominant looking products, consumers can compensate the perceived gap in their status. This dominance can be communicated by a product's face. It discusses future implications for researchers and practitioners.

Chapter 14 addresses the difficult area of new product development. It also provides tips on how to design the test, based on the author's rich experience with one of India's leading FMCG marketing companies. The chapter also looks at how to create and test communication and how to track the performance of the new brand launch in the market.

Chapter 15 outlines the concepts of price elasticity, cross-price elasticity and income elasticity. It also focuses on survey-based methods of understanding response to price and reviews conjoint analysis and choice-based conjoint. It then provides several practical tips on how to run such studies without falling into the common traps of standard textbook approaches.

Chapter 16 uses trends in advertising over the years to show how the themes centering on social approval within a patriarchal value system have given way to the celebration of personal fulfilment and gender equality. Leaning on the database of advertising around the world, Kantar Millward Brown comes to the conclusion that the ability of an execution to provide joy and entertainment is the key determinant of an ad's effectiveness in cutting through clutter.

Chapter 17 is a wonderful walk through advertising history. Authored by an ad veteran and master raconteur, this journey of over a 100 years, flits by quickly. Using dozens of examples, the chapter draws one into the challenges of marketing and advertising of that day.

Chapter 18 traces the impact of Internet and digital technology on consumers and businesses. The author wonders whether the hyper-customized media with filter bubbles and personalized search results delivered by website algorithms reflects diminished rather than enhanced consumer power.

Chapter 19 looks at how to construct effective impact evaluation studies in the area of social marketing programmes. The use of Regression Discontinuity Design to create counterfactual data or improving the matching of cases using Propensity Score Matching or creating routes to survey difficult-to-reach populations such as intravenous drug users and gay populations, are some of the issues explored in this chapter.

Chapter 20 looks at how advertising and promotion could change in the future. With increased penetration of smartphones and faster Internet services, consumers are generating vast amounts of data. All this is driving what products are on offer, how to communicate and more importantly who to communicate to and when. If driven to scale, it can dramatically increase the efficiency with which marketers can communicate with consumers and service their needs.

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Maheswaran writes,

This book was conceptualized during the Ph.D. seminar I taught at the Indian School of Business (ISB) and has benefitted enormously from my interaction with the faculty and students. Special thanks to Malika, a Ph.D. candidate in Marketing whose research and editorial help were invaluable in the completion of this book. Prof. Sridhar Sheshadri was instrumental in making my visits to ISB possible and has continued to support this project through all stages. Prof. Jagmohan Raju, Prof. Tanuka Ghosal, Prof. Rishtee Batra, Prof. Arunachalam, Prof. Arun Pereira, Prof. Sanjay Kallapur and Sudhir Voletti have all contributed to the intellectual capital of this volume. The administrative staff at ISB, especially Peketi Varalakshmi at Hyderabad and Rupsy Grewal Sachdeva at Mohali campus made my stay at both campuses a time to remember. Finally, thanks to Dean Raj Srivastava for his support in sponsoring the launch event and also to his team, headed by Kumara Guru, for all their organizational support.

Thomas writes,

I am very grateful to Rohini Abraham and Hemant Mehta who were very helpful in structuring the chapters that were written by Indian industry. I also record our appreciation of the efforts of Mohan Krishnan and Satya Dash of IIM Lucknow, who were instrumental in putting us in touch with Oxford University Press.

To all those who helped us in this journey, we salute you!

*Duraij Maheswaran
Thomas Puliyel*

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Understanding Indian Youth

Their Values, Attitudes and Lifestyles



Rohini Abraham

What really is the reason for the constant buzz about youth in India? Never before have they been so closely examined or catered to with such avidity. The post-globalization youth is a generation of powerful change makers. They are born centre stage in a world of possibilities. They are not mired in old world societal or economic expectations. They are children of hope and optimism. Their umbilical digital cord has expanded their influence. They are very much the warp and weft of a global world. However, the mistake is to assume that *global* is equivalent to *western*. The Indian youth is unambiguously Indian and has absorbed change, resulting in a unique potpourri of values that comprise both the traditional and the modern. However, even the traditional has been reshaped with new meanings.

The New Equilibrium

Contrary to popular writing, the youth are all about balance—tradition and modernity are close companions and these play out in multiple ways. Respect for elders is more about good manners rather than blind tradition; they prefer arranged marriages but accept divorce; no one looks askance at love marriages either—that is seen as an individual preference. Families are considered very important even though they refuse to be defined by them. The role of women similarly, sees the familiar mixed with the new—the male youth respect equality and working women but draw the line at women earning more. Given a chance they would prefer the women stay at home but are reluctant to openly voice such opinions. In many ways the Indian youth is like fusion food—western in appearance and uniquely Indian at core. They display a great pride in being Indian and are more aligned to the Indian way of life. More than just rejecting the western lifestyle or philosophy (indeed not much is known about it) the fact is that the youth are happy with the comforting familiarity and values of the new India. The West is strictly opportunity geography and a benchmark for fashion trends. Bracketed with steadfast family support on one hand and a celebration of youth on the other, India seems the best place to be in.

Their values and morals are firmly inked in grey—morality per se is a fluid concept and they are above all realistic, they accept the world as is and even applaud the good sense of this. While idealism is appreciated, flexibility is seen as a more practical value. This fluidity encourages a shift from the importance of being morally correct to being personally useful. Shortcuts, a little manipulation, a few white lies, managing the system, are all necessary evils.

“*Though our morals and learning have taught us that greed is bad and a sin, but the truth is that we all are greedy for something which makes us work towards it, take it as an objective.*”

— Dhruv, 21 years

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They are inherently self-confident and believe that they have the capability to achieve their ambitions. The world has told them so and this confidence is backed by several signposts—more education, earning at a younger age, late marriages—all of which release them from the status of a dependent child. However, sitting alongside this confidence is a high level of self-consciousness as they worry deeply about how their peers view them. Above all they want peer admiration, failing which, to at least fit in with them. No one wants to stand out as the oddball.

Religion is self-defined. It is considered a private belief and not ritualistic in nature—the celebrations are enjoyed more or less in the same way anything entertaining is enjoyed. They do not approve of dogmatic rituals or discrimination based on religion. Further, they look at superstitions and godmen with a healthy scepticism.

Money

This is an entitled generation. They are unashamedly materialistic and money is the universal panacea that can buy love and happiness. Money and earning power is their social currency—a sure way of getting the recognition they seek. They live in a more materially enabled world and their high expectations of life are fuelled by seeing relatively greater affluence around them, by the earning opportunities opened via globalization, by the optimism that tells them that the clock cannot be turned back despite recessionary signs, and by the persuasive power of social expectations.

Given the importance of monetary success, the path to money is never unethical or wrong—what matters is that they achieve success. Living cheek by jowl with the more affluent inspires their hunt for money; and money in turn earns them respect, status and of course the ability to afford the badges of the wealthy.

“ Friendships, relations ... all are ruled by your financial status ... socializing is more about declaring your current financial status. No free lunches. ”

— Tara, 25 years

Relationships

All relationships seem to be in a state of flux and being re-envisioned by the young.

Family and friends run on parallel tracks. In an uncertain world, the family provides stability and security and friends provide everything else. Many youth surprisingly vote for the convenience of living in a joint family, underlining their dependence on family relationships. However, this is not the joint family of yesteryears—in urban India at least, the notion of family is a steadily shrinking circle—usually this means parents and siblings and at best grandparents. But there are also dichotomies that leave the youth feeling a bit rudderless. In a changing world, parents find it difficult to guide their children and if anything, the children find themselves as advisers. Parents are no longer authoritarian but neither are they seen as authorities who can guide them in a new world. Left to navigate on their own, the youth are not sure who to look to for guidance. As a result the relationship borders on being both mutually supportive and manipulative.

Friends are who they turn to for advice, support and inclusion. This is the circle that partners them through life. Friends are perceived to be good to have but tagged with a utility value—segregated as per their contribution to the furtherance of the self. The digital world has at once expanded the

circle of friends as well as contracted the depth of relationships. This has put a stress on the limits of friendships. Social media has also encouraged the expansion of friends (read contacts) to find those who can re-design one's social circle, help in careers, be fashion and lifestyle guides, etc. Friends are likely to keep changing in importance according to the role they are expected to fulfil.

“ I am clear about my long-term goals. I am investing time with people who can be useful for me ... say after 5 years. ”

— Kapil, 22 years

Icons

The chasm between the old and the new has left this segment at odds with the traditional icons that inspired an older generation. The old, larger-than-life icons are too distant and do not reflect the practical values of the youth.

Today's heroes are what we call the *Vertical Invaders*. These are people who are perceived to emerge out of the blue from relatively humble backgrounds and quickly carve a space of success. The success of *vertical invaders* is attributed to their own abilities and skill rather than heritable ones, with all the romance of a rags-to-riches story. Such icons are admired for their individuality, resilience and ability of winning against all odds. Further, they are perceived to have strong points of view which are not necessarily in harmony with society at large but staying true to their own values. Typical examples of vertical invaders are Virat Kohli and Honey Singh.

Achievement

The youth want aspiration (*Look what I can be*) rather than inspiration (*What I should be but am not*—that is too idealistic and uphill a task). They admire success, fame, individuality and astuteness, and want to belong to tribes that epitomize such values. The inclusion gives them hope, belongingness and elevates them from *who I am* to *who I want to be*. Not surprisingly, success is equated to making money. Lots of it! Having said that, this is not a risk taking generation. For all the hyped up new opportunities being talked about, most prefer to stay within the boundaries of established careers—government jobs, medicine, etc. If choosing an unconventional career, they still look or hope for some kind of success guarantee. However, what has changed is the notion of career per se. The young see multiple changes as a smart move leading to wider experiences and a quick way to earn more. Earning power overrides job satisfaction and career building.

“ Being a good employee, a good boyfriend and a good son is no longer enough. The more hats you wear... the more admiration you get from others. You become an example. Simple is good, complicated is even better. ”

— Anuraag, 24 years

Living within Multiple Dichotomies

It is tempting to think of the youth as a generation with a silver spoon. In reality this generation, despite its optimism and ideals, also suffers a high degree of stress. Familiar paradigms have shifted in their lives. There is little overlap between experiences of self and parents. The rewards of globalization are put on the shoulders of the young—they bear the weight of the family and society's expectations,

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they are envied for the multitude of opportunities open to them; they are expected to be marking new frontiers; their western outside is seen as having penetrated the inside. In reality, however, the youth face a life that has no familiar markers, no milestones—everything is in flux whether it's the parent-child relationship, clearly defined gender roles or the choice of professions. There is nobody whose life can be emulated as a whole. In the face of this, self-reliance has become the core of their character.

As a consequence, they find themselves in the driving seat without an instructor. The traditional role models are outdated and the new ones are only just emerging. The grey lines of ethics and power they witness, the fast pace of life, the clash of cultures, all lead to a deficit of trust in anyone or anything outside of themselves.

If that is not challenging enough, this generation, fed by media and society's admiration, expect their path to be easy and feel challenged by real life difficulties.

Consumption

The need to consume is all-important. For the youth what they wear, use or own are all important markers of success—*Deferred gratification is as uncool as grey polyester safari suits.*

When there is so much that is uncertain...extrapolating to the future is meaningless—*I pretty much spend for today and let tomorrow bring what it brings.*

Having said that, there is no reckless spending. They have adapted the thrift of an older generation with the conspicuous consumption of today. As a result they are smart spenders, financially savvy and deal comfortably with debt; they want real value for their priorities. While unlikely to splurge on expensive brands, they are equally unlikely to buy unbranded goods just because they are cheaper. Good sense dictates that mobile services are worth spending on but it's not necessary to spend on the latest high priced mobile phones. They readily compromise with cheaper models/brands that offer comparable aesthetics and utility—happy to live with *good enough* technology as long as it gives them access to their needs.

Status symbols too have changed with the times. Yesteryear's symbols of success are now generic and other aspects take precedence. For example, ownership of a car is taken for granted and the emphasis has shifted from the practicalities of engine type, fuel efficiency and size to the type of car, aesthetics, personalization and accessories.

Gender Roles

The male identity is caught in an emerging template where the new is still being etched in. He is squeezed between new demands on his sense of masculinity, a pressure accentuated by new feminine identities and, of course, the media discourse on the new male—all of which are forcing him to re-evaluate the self. The confusion is reflected in his attitudes—young men support gender equality and they strongly feel that women should not be limited by traditional expectations but many want their wives to be at home; women should work but not earn more than men. Divorce is acceptable as long as it happens to someone else.

On the other hand, young women are finding their voice and refusing to be narrowcast. Girls are discreetly but firmly rebelling against traditional stereotyping. While they do not refuse the role of mother, wife and homemaker, they are not willing to be restricted to just them. Ambition has reared

its head and girls are using careers as their currency to find a way out of traditional moulds. They are happy with 9-5 jobs as long as it provides economic and social freedoms. Therefore, they tend to take their education more seriously as they see it as a pathway to independence. Protest politics and education have enabled women to be heard in the social sphere and establish the mainstreaming of change for the status of women.

Brands

Brands and what they stand for are extremely important for the youth. Peer approval of the brands is equally important. However, this is not a blind faith in brands per se—brands are subjected to the complicated concept of value. The cheapest is not necessarily the best but neither is expensive the answer. Brands are answerable to demands for quality and social value. Interestingly, the youth is not swayed by international brands only. Made in India is not a turnoff, provided the brand has a viable story.

Fashion is the single largest splurge-worthy category for this generation. For the youth, their dress codes are, by far, the most important signifier of belongingness. Advice is looked for through online communities, movies and movie stars rather than offline friends who they feel are sailing in the same boat and therefore, not capable of giving direction.

While paying lip service to environmental issues, in truth, they are not overly concerned with organic or environment friendly brand promises and certainly not willing to pay more for this distinction.

The India Story

For the youth, the single most important effect of globalization is a growing pride in the India story. Bollywood is more relevant and exciting than Hollywood. Honey Singh echoes their inner angst better than Britney Spears. Hindi music is hip and the first choice for any celebration or party.

The young have a high sense of confidence in India and its future. There is increasing chatter about the value of Indian history, culture and capability. Even the family bonds, though being reshaped, are referred to with pride and there is no overt or covert yearning for a western way of life which is anyway seen through a unidimensional lens.

Having said that, the youth are keenly aware of the many drawbacks in Indian society and do not hesitate to voice this—often, this is the basis of youth activism. Corruption is seen as widespread and perceived to be the root cause of the income disparity. The issue of women's safety is equally supported by men and women, as is equal gender opportunity.

Food and Beverage

The Food and Beverage (F&B) segment carries with it the excitement of experimentation with new tastes, the need for convenience and the rising awareness of health. This is further underlined with vague suspicions about packaged F&B—encouraged by faint knowledge but high decibel food activism. As a result, there is more involvement in what and how the brand delivers.

F&B has become the new lifestyle indicator and knowledge of cuisine has acquired bragging rights. There is high excitement and willingness to try new cuisines and learn about their origins and details. F&B is all about socialization, and circulating photos on social media of food being eaten is increasingly fashionable. Higher health awareness makes them more susceptible to benefit promises, especially

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in the beverage arena. This may perhaps account for the rise in naturals—the preference for juices instead of colas, the appreciation for nostalgia repackaged in modern packaging (*jeera pani*, mango juice, *lassi*, etc.) and the rise in flavoured milk. Paradoxically, fast food remains a constant favourite and immune to any health critiques. It caters to the convenience, taste and socialization needs.

The Digital Influence

This is a generation that lives simultaneous offline and online lives. Social networks have become modern day communes and a way to hothouse their own space, to voice their opinions, showcase new facets of their personalities and invent their own language codes. Above all it is a means to make and manage useful friendships.

However, the digital influence has not made life easier. Caught between projecting alternate lives, the youth find themselves in the unenviable position of being more alone and subconsciously on guard all the time. The high need for peer approval makes it imperative that they make their personas sound and look interesting. The large number of online friends precludes the trust and comfort of deep relationships. The parental guidance and/or any checks and balances that an older generation experienced, is replaced with answers and solutions from virtual strangers, many of whom are equally clueless.

Beauty and Fashion

For both genders, looking good is of paramount importance and comprises a mix of grooming and physical fitness.

The achievement of beauty goals is firmly rooted in branded solutions rather than in-house remedies. This is a generation in a hurry and demands instant solutions—something that homemade does not offer. For both men and women, looking attractive gives a sense of social acceptance and for women especially, a sense of power and self-confidence.

Their preference in clothes reveals their multi-layered personalities. While western clothes establish modernity, Indian clothes are not seen as second best. The sari blouses, the kurtas, the salwars have been modernized and made fashionable; brands in this area are making their presence felt.

Conclusion

The contradictions in youth are perhaps less of a problem for them than it is for marketers. Globalization has given youth the option to pick and choose values and behaviours that will propel them to actualize their life aims. It's a generation that is proud of its transitional status. If there is anything they have established, it is the power of choice that they exercise. Old and new have no meaning—the idea is to use sensibly from both worlds.

Most brand communication to youth has too long been based on a largely western model and therefore, failed to have longevity value. They choose to portray youthfulness but not the spirit of this young generation. Other brands have recognized the change and tapped into emotions that create resonance and therefore, make an impact. Tanishq, for example, recognized the value of breaking stereotypes and focusing on emerging youth values—the re-marriage TVC was widely appreciated by the youth. Fastrack tackles socio-culturally delicate subjects such as LGBT and affairs with older women. Havells successfully portrayed emerging values—the groom taking on the bride's name; the

refusal to acknowledge religion in official forms. Cadbury has built emotional relevance and the fast food brands depict youth socialization codes. Unilever's Comfort TVC *Chota step, Badi baat* gently encourages correcting gender stereotypes. The iconic Cola brands have chosen to play safe and lost resonance by standing for youthful generalities rather than meaningful specificities. Mountain Dew, on the other hand, dramatically captures the emotion of conquering one's fears.

It is India's youth and not its middle class that will provide the most promising potential for marketers. It is worth spending time to truly understand them rather than locking them into stereotypes.

DISCUSSION QUESTIONS

1. How do you see the parental influence on youth values developing in the near future? What factors will drive the changes?
2. What are the key differences between Indian and western youth? With greater exposure to western lifestyles do you believe Indian youth will, sooner or later, be indistinguishable from their western counterparts? Discuss with examples.
3. A lot has been written about India's demographic dividend and the expectations placed on India's youth. What are some of the challenges youth face in establishing their identity?
4. Make a list of brands that appeal to Indian youth in particular. Discuss what factors drive the appeal.
5. Do you think social media is impacting youth values and attitudes? Discuss with examples.
6. How is the youth projected in Indian cinema and/or TV serials? How realistic are these depictions? Discuss with examples.

Suggested Reading

DeSouza, P. R., S. Kumar, and S. Shastri. (2009). *Indian Youth in a Transforming World: Attitudes and Perceptions*, Sage Publications India.

About the Author



Rohini Abraham is a Qualitative Research expert with over 35 years of work experience. She worked in advertising before shifting to Qualitative Research. She set up and headed MBL's Qualitative Unit in India, which went on to become TNS India. Subsequently, she headed the Qualitative Unit in Kantar IMRB. Rohini retired in July 2016. Her insights on Indian youth are the cumulative result based on her multiple years of researching this target group and monitoring the changes across both urban and rural India.