



**Ipsos Global Trends 2023**

# **Recovery and Reset: The India Story**

**GLOBAL  
TRENDS  
2023**



# Ipsos Global Trends

**2019:** Trends and foresight experts analyzed **370 Qs** across **36 markets**, identifying **36 global values** and **12 trends**

**Annual updates:** How **12 trends** (which cover health, brand-building, individual expressions, technology, data security, climate change, and social issues) **have changed – or not changed – over time.**

**2023: Latest Update**, blending our latest **data**, local **signals**, and some **thought-starter provocations** for your organization and your brands.

Now we have trends from the pre-Covid times, during Covid, immediately after Covid, and now 2023, which gives a post Covid recovery perspective

**We hope you find these insights thought-provoking.**





**2023: Fielded in 50 markets across 48,000+ interviews, this edition covers 87% of the global economy and 70% of the global population.**

Canada  
United States

Argentina  
Brazil  
Chile  
Colombia  
Costa Rica  
Dominican Republic  
Ecuador  
Guatemala  
Mexico  
Panama  
Peru  
Puerto Rico

Belgium  
Bulgaria  
Denmark  
France  
Germany  
Great Britain  
Greece

Israel  
Italy  
Kingdom of  
Saudi Arabia  
Morocco  
Netherlands  
Poland

Romania  
Spain  
Sweden  
Turkey  
UAE

Australia  
China  
Hong Kong  
India  
Indonesia  
Japan  
Malaysia

New Zealand  
Pakistan  
Philippines  
Singapore  
South Korea  
Thailand  
Vietnam

Kenya  
Nigeria  
South Africa  
Zambia

# Methodology: India Edition

This report focuses on the findings from India.

In previous years (2016, 2019, 2021) and this year as well, the India sample was covered through online panels which represent the **Digital Indians** cohort (n=1000; mostly NCCS A).

In the 2021 and 2022 fieldwork, we have supplemented the online survey with a robust offline sample to show findings amongst the broader **General Indian Consumer**.

In the offline sample, we covered 2000 consumers (18+ Years; NCCS A, B, C).

Fieldwork conducted over September – November 2022. Data has been weighted to represent universe proportions

- The report lays out the findings by each trend, with the ranking and scores among Urban Masses and Digital Indians.
- The **ranks** have been calculated using a normalized Agreement Index score, which reflects the importance of that trend in relation to other trends.
- For each trend, we also showcase the **increase/ decrease** in agreement (in comparison to the previous wave) based on the Agreement Index score.
- Only **Top Box** agreement scores have been used for the purpose of this report.

# Contents: India Report

**Ipsos Global Trends 2023 provides a toolkit to help you navigate the future.**

If you only have a few minutes, read the Executive Summary to get a gist of the India Story.

If you want to know all the details, to inform your strategic planning and decision-making, then dive into how our Trends have evolved in the 'India Trends 2023' section

Want to go deeper? Contact our **Consumer Advisory Team** ([Krishnendu.Dutta@ipsos.com](mailto:Krishnendu.Dutta@ipsos.com) or [Sakina.Pittalwala@ipsos.com](mailto:Sakina.Pittalwala@ipsos.com)) to learn more about your sector, market or category, and the relevant implications and opportunities.

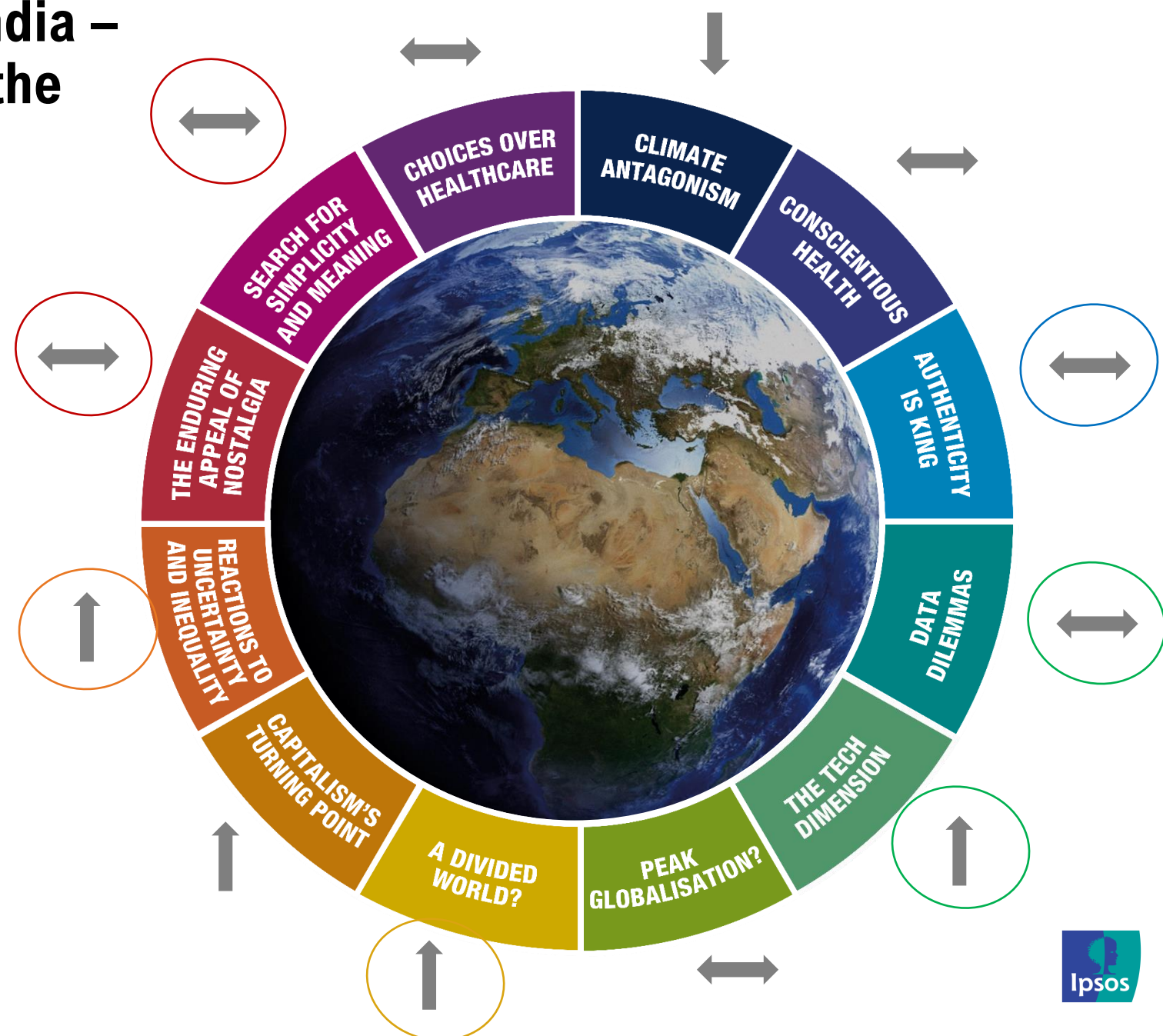






# Executive Summary

# 2023 Trends at-a-glance for India – how trends are moving since the last wave



Polarizing Trends



# Emerging Themes for India

In 2023, as the world grapples with a poly-crisis of war, inflation, and a looming environmental crisis, Indians appear to be more hopeful and looking to normalize their lives post-pandemic, in their own ways.

As per World Inequality Report 2022, the Top 1% of the Indian population holds 15 times more wealth than the bottom 50%. This is amply demonstrated in the Indian response to the Ipsos Global Trends 2023 survey. Two broad cohorts emerge basis responses – **Digital Indians** who are digitally savvy, affluent, and with greater exposure to the global world, representative of the top 1%, and the **Urban Masses** who are more representative of the urban masses across India and who have been most impacted economically by the pandemic. Both these cohorts are divided in working towards their common goal to normalize post-pandemic, and their concerns.

There are trends that polarize and there are trends that unify. These trends fall into three broad themes:

1. The Divide Between – slowing down, being real vs. making up for lost time.
2. The Divide Within – the dichotomies in individual expressionism and opinions about society
3. The Unifiers – themes that have universal resonance among both cohorts







## 1. The Divide Between

# The Divide Between – Slowing Down, Being Real Vs. Making Up for Lost Time

The increased and prolonged exposure to all things digital during the pandemic, among Digital Indians is leading to increased questioning of the value of **accelerated tech progress** (34% compared to 27% in the last wave, 2021).

During the pandemic, all aspects of life, be they work, education, working out, leisure and entertainment, socializing, and even newspapers went online. The increased and prolonged exposure to all things digital and its accompanying toxicity, among **Digital Indians** is leading to an increasing need for simplicity and authenticity. There is a need to return to a simpler life where real interactions happen with real people in a real brick-and-mortar world. The related Trends of Authenticity, Simplicity and Nostalgia appear to be peaking among this cohort with a strong hankering for wanting things to be the way they used to be. They increasingly seek to enjoy the touch-and-feel joys of brick-and-mortar shopping again. Younger Digital Indians favour online more, but there are many reasons for bringing everyone back to **offline retail**, while still enjoying some benefits of convergent commerce. There is also an increased willingness to spend on brands rooted in authenticity – of origin, craft, or tradition.

But **Simplicity, Authenticity and Nostalgia** feel like more indulgent pursuits for the **Urban Masses** who appear concerned about wealth disparity (49%). They are worried that the world is changing too fast (71%) and there is fear of being left behind in the economically progressive India. They are then focused on making the most of opportunities that have represented themselves in the past one year to **climb up social and economic ladders**. They appear to be well entrenched in more capitalistic pursuits and welcome all those such as business leaders that can help them to get ahead in their careers and overcome the economic suppression that they perceive. Unlike Digital Indians, Urban Masses look at technology as an enabler that will help fulfill their aspirations. They are less concerned about **data privacy** too, viewing privacy loss as being inevitable. Climate concerns too take a back seat among them as they march forward and onwards.





## 2. The Divide Within

# The Divide Within – The Dichotomies in Individual Expressionism and Opinions About Society

Long periods of **social isolation** and being confined within the four walls of the home has led to a more hardened attitude among the **Urban Masses** towards **women** as better suited for being wives and mothers rather than bread earners (61%).

This traditionalism within the boundaries of home and family is driven by the single-minded focus on maximizing opportunities and the need to control whatever is likely to get in the way (e.g., family dynamics).

The same Urban Masses appear to be keen to project a more **progressive-mindedness** when it comes to society at large, to the world beyond the home. In this, they are driven by the need for greater acceptance as they strive to move up the socioeconomic ladder. Thus, they are happy for others to be who they want (60%), and for transgender people to live as they want (67%).

On the other hand, too much exposure to **brutal social media**, toxicity in media, and the need for political correctness is leading to **Digital Indians** reflecting a mirror image of the **Urban Masses**. They remain more liberal in-home and more **accepting of women as bread earners**. But they project a more **hardened image** on the outside, towards **transgender** issues – fewer Digital Indians (49%) are willing to grant space to transgenders as compared to 57% in the previous round of the Ipsos Global Trends survey.

This appears to be a nascent trend yet, but it could gather momentum going forward, as we see in the more developed Western markets.



A man in a red tank top is shown from the chest up, looking down at his smartwatch on his left wrist. He is also wearing earbuds. The background is a blurred cityscape. A semi-transparent grey box with the text '3. The Unifiers' is overlaid on the image.

### 3. The Unifiers

# The Unifiers – Themes That Have Universal Resonance Among Both Cohorts

Indians remain vigilant about **health and healthcare** post the pandemic and this remains the lead **unifying trend**. Having suffered severe health setbacks and personal loss, there is a growing recognition that health is a matter of personal choice and control. In sync with their global counterparts, Indians also speak about **mental health** consciousness. Both cohorts want more direct access to healthcare and more control over solutions and outcomes.

Both cohorts also identify with a **larger, more global identity** as the world becomes smaller. It is also interesting that the Urban Masses seem to be increasingly more engaged with **Peak Globalization** as Digital Indians, in line with sentiments that suggest aspiration and the need to catch up on opportunities post the pandemic.





# Overall Implications for Marketers

## The Divide Between

For Digital Indians, creating more Experience Zones in Modern Retail could enhance their brick-and-mortar experience and could create strong store loyalty. This experience could be further enhanced with increased human guidance across the consumer experience journey, not only in offline but also in omnichannel shopping.

Technology and digital have a critical role to play in driving the next millions towards consumption among Urban Masses. While online shopping channels will continue to enamor, it will be also important to develop omnichannel businesses to help provide assurances around e-commerce. Value stories are going to remain critical as is access to Urban Masses living in lower-tier cities.

## The Divide Within

Brand communications have a big role to play in helping to change the narrative when it comes to women's portrayal. Maintaining more balance and sensitivity in portrayal of roles within the family will become critical to carry along the chief wage earner (men) and the chief decision maker (women).

Building greater equity in the workplace could become a harbinger for more normalized dynamics in the family and society at large.

## The Unifiers

For health companies, both mass and premium segment health supplements provide ample opportunities for growth.

The nascent mental health space in India also offers opportunities for mental wellness apps and online (more anonymous) support.

Organizations too can benefit by launching mental wellness initiatives for employees.



# India Trends in 2023



Rank: 5  
Direction: Decline



Rank: 11  
Direction: Stable

## CLIMATE ANTAGONISM

Climate change has become a visceral reality, with the past year seeing the largest number of climate-related disasters in recorded history. But there is rampant debate about who is responsible for climate change and how to address it: some consumers are changing how they make purchasing decisions according to their environmental impact, while others are putting the responsibility squarely on the shoulders of government, systems and corporations.



# Divided opinions on climate emergency among Indians; there is growing awareness and actions on ground to support environment and SDGs

## What it's about today:

There are mixed sentiments on Climate Change – while 60% of the Urban Masses are concerned about impending disasters, only 45% of Digital Indians agree on the same. This should also be read in the context that sustainable and environment-friendly practices are ingrained in our lifestyle and culture already. Indian households try to follow the reduce, reuse, and recycle principle as a habit, and more likely the Urban Masses than their Digital counterparts.

In a segmentation conducted globally by Ipsos on the level of concern and action/ engagement with the environment<sup>1</sup>, the largest segment for India was Pragmatists (29%) – who are willing to embrace low-cost sustainable products and are the most concerned about the environment and Busy Bystanders (27%) – who are only interested in convenience/ routine. The smallest segment was Conflicted Contributors (11%) – who welcome Government intervention.

Citizens and consumers want to see leadership from governments, NGOs, and Businesses on this issue.

India's active participation in CoP26 and commitment towards net zero emissions, its holistic approach towards 2030 Sustainable Development Goals (SDGs) are all steps in the right direction.

Brands can help consumers meet their individual needs around climate change and the environment. There is a growing realization of the impact of consumption on the environment, but consumers are not always willing to pay a premium for eco-friendly products/ packaging.

<sup>1</sup> – Ipsos Report - *ipsos-views-environmental-sustainability-who-cares*

# 60%

of Urban Masses feel that we are heading for environmental disaster unless we change our habits quickly

# High concern for the environment (but on a decline) among Urban Masses



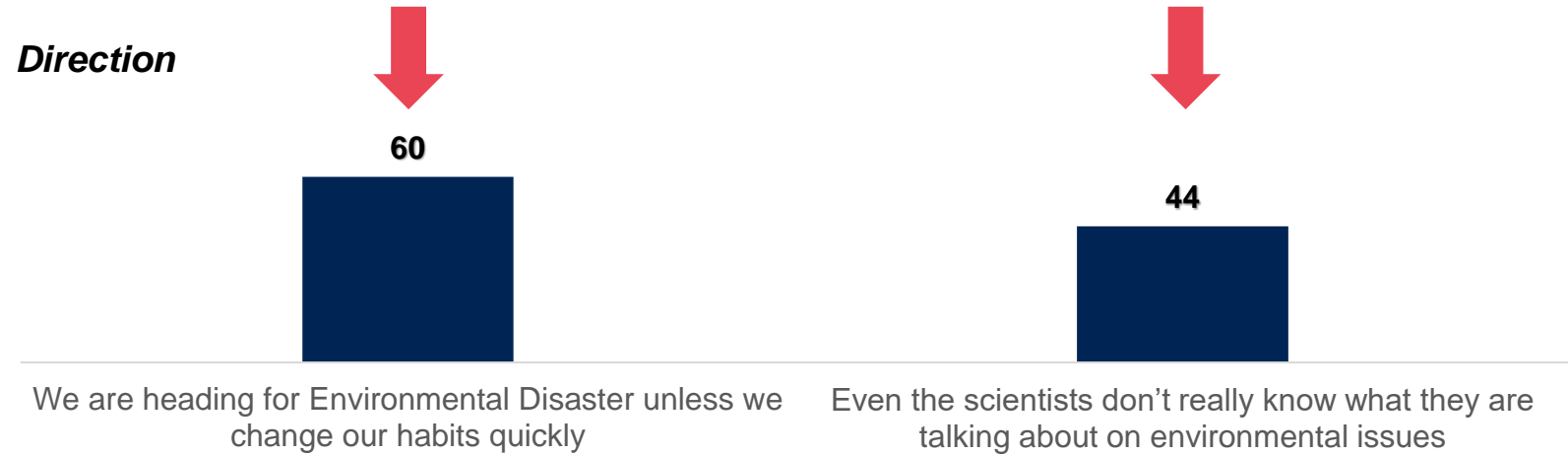
To what extent do you agree or disagree  
with the following statements?  
% strongly agree

**We are heading for Environmental  
Disaster unless we change our  
habits quickly**

**Even the scientists don't really  
know what they are talking about on  
environmental issues**

Base:  
2000 Urban Masses

**Direction**



Concern for the Environment is ...

- higher in **West Zone**, with 75% agreeing with “heading for environmental disaster unless we change our habits quickly”
- Lower in Tier 3 towns, with only 42% agreeing with the statement
- Similar among age groups

# Even Digital Indians show lower concern for the environment



*To what extent do you agree or disagree with the following statements?*  
*% strongly agree*

**We are heading for Environmental Disaster unless we change our habits quickly**

**Even the scientists don't really know what they are talking about on environmental issues**

**Base:**  
1000 Digital Indians

**Direction**



**45**



We are heading for Environmental Disaster unless we change our habits quickly



**33**



Even the scientists don't really know what they are talking about on environmental issues

- Among Digital Indians, the decline in concern for the environment is more among younger age group (18-35 yrs old) and in Metros/ Tier 1 towns



## Signals

Govt and small businesses making efforts towards sustainability

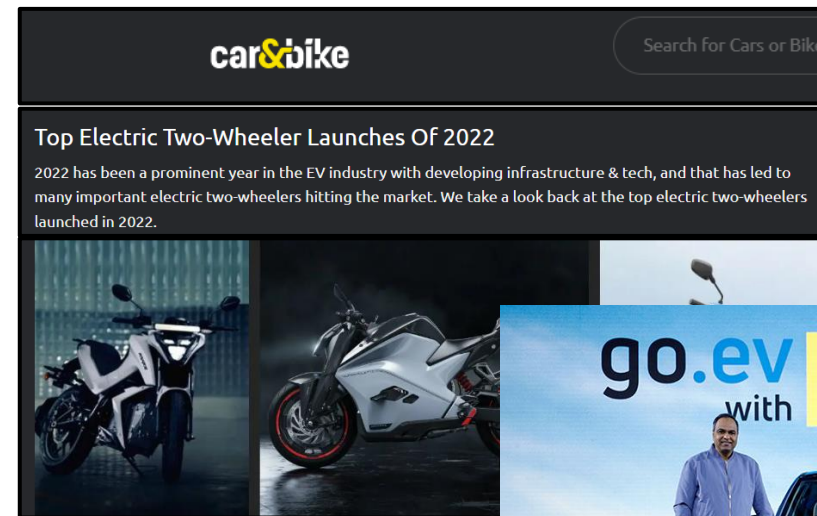
### COP26: India PM Narendra Modi pledges net zero by 2070

2 November 2021



Source : Earthshot Prize 2022

Electric Vehicles – 2 wheelers making an impact, 4 wheelers getting into action



## Thought Starters

# Brands need to make ‘sustainability’ an easier option for consumer

Consumers think it is difficult to make sustainable choices – How can we as brands **make sustainability a co-benefit** that counts for them?

How can brands **make consumers a part of their sustainability efforts**?

A BCG analysis<sup>1</sup> has shown that those who do not buy sustainable products perceive a much higher ‘**green premium**’ than there is.

What can be done to break this misconception and bring in the fence-sitters (the **Conflicted Contributors** and the **Busy Bystanders**)?

### **Accountability, Transparency, Communication across all stakeholders**

For the ESG action loop to work effectively, all stakeholders, including consumers, should be communicated the ESG goals, and actions in a transparent and consistent manner.

Marketers should be taking the conversation to the consumers more.

<sup>1</sup> –BCG Report – Making Sustainable Products mainstream (September 2022)







**Rank: 4**  
**Direction: Stable**



**Rank: 1**  
**Direction: Decline**

# CONSCIENTIOUS HEALTH

Health is becoming more holistic, taking into account multiple meanings of well-being. The interconnectedness of health with other systems is also being examined, to begin to address inequities.



# Mental Health an emerging priority and losing taboo

## What it's about today:

Health conscientiousness continues to be a leading trend among both cohorts. High and stable among the Urban Masses, it declines somewhat among the Digital Indians. The Digital Indians, who had focused disproportionately on health during the pandemic, are possibly looking at it now as one of many priorities – we see a pattern of behavior normalization among them post-pandemic. The Urban Masses, on the other hand, were possibly pushed into active healthcare during the pandemic, and continue to be focused on it.

The pandemic period, with its disrupted routines, blurring boundaries between work and family, and sheer mental and emotional distress has resulted in mental health slowly but surely emerging out of the closet among both cohorts. It is now emerging as equally important to physical health among more than half of the respondents surveyed, across both clusters.

This increase in health consciousness is being driven by sustained push and pull factors in recent times. Indians have been inundated with health and fitness-related messages from all quarters – government including Prime Minister Narendra Modi throwing their weight behind yoga, the Ministry of Ayush, the *Khelo* India Youth Games, the successes of Indian athletes and sportspeople in world events, celebrities getting behind sports and health initiatives ... the list is almost endless. Urban spaces are beginning to be dotted by public gyms and the popularity of health-tech enterprises and wearables has never been more popular. Newer health foods and nutritional and health supplements are gaining quick acceptance across both cohorts. Consequently, healthy choices have never been so much in the buzz, nor have they been more palatable!

# 56%

of Urban Masses strongly agree that they need to do more to look after mental health

# Consciousness about mental health almost at par with physical health



To what extent do you agree or disagree with the following statements?

% strongly agree

**I need to do more to look after myself physically.**

**I will sacrifice convenience if it means getting healthier products**

**I need to do more to look after my mental well-being.**

Base:  
2000 Urban Masses

**Direction**



**62**

I need to do more to look after myself physically



**52**

I will sacrifice convenience if it means getting healthier products

**New Statement**

**56**

I need to do more to look after my mental well-being.

- Consciousness about Mental Health is higher among the relatively older Urban Masses, starting out from the mid-thirties. This possibly links to higher share of responsibilities building up from that life stage.
- Sacrificing convenience to buy healthier – is stronger among the South Zone, and links to stronger belief systems about traditional solutions in the South.

# Though still a leading trend, proactivity in taking care of physical health is somewhat muted among Digital Indians; post-pandemic concerns reducing



To what extent do you agree or disagree with the following statements?

% strongly agree

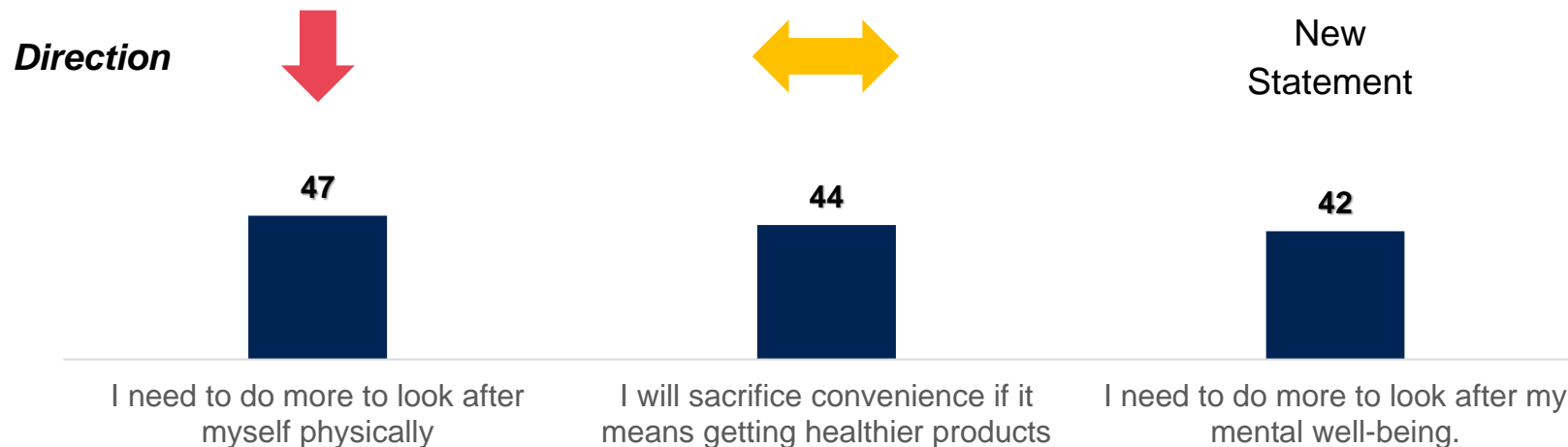
**I need to do more to look after myself physically.**

**I will sacrifice convenience if it means getting healthier products**

**I need to do more to look after my mental well-being.**

Base:

1000 Digital Indians



- The Decline in proactivity towards Physical Health is seen more among Younger Digital Indians → the peak in this trend during the Pandemic was also driven by this cohort. Return to a more regular work life and time spent on Shopping and Entertainment outside Home likely impacting Pandemic time created health routines.
- Consciousness about Mental Health is building across demographic cohorts, marginally higher among working population in their early to middle working years.



## Signals

# Growing consciousness about physical and mental health in India, with celebrities and Govt doing their bit

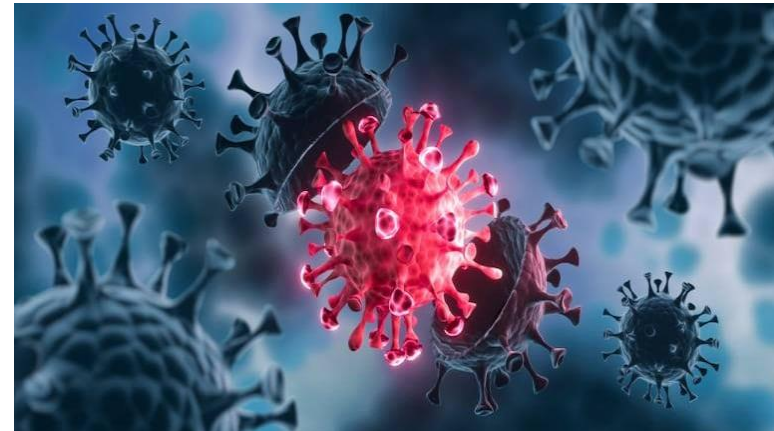
### India takes the lead in promoting the 2023 International Year of Millets

By Gill Hyslop

14-Sep-2022 - Last updated on 14-Sep-2022 at 10:13 GMT



### Pandemic effect: Indian consumers now more conscious of health, fitness and holistic nutrition, says survey



Source : EY India's report 'The Sunrise Consumer Health and Nutrition Sector, 2022

## Thought Starters

# A sustained drive by both Govt and Corporates can help maintain Conscientious Health as a leading trend

### Short-Term Fads or Long-Term Trends?

While the pandemic had heightened focus on proactive health consciousness in general and brought mental health also into focus, some of this is tapering off.

Tracking these behaviours would give marketers a better handle on true consumer shifts.

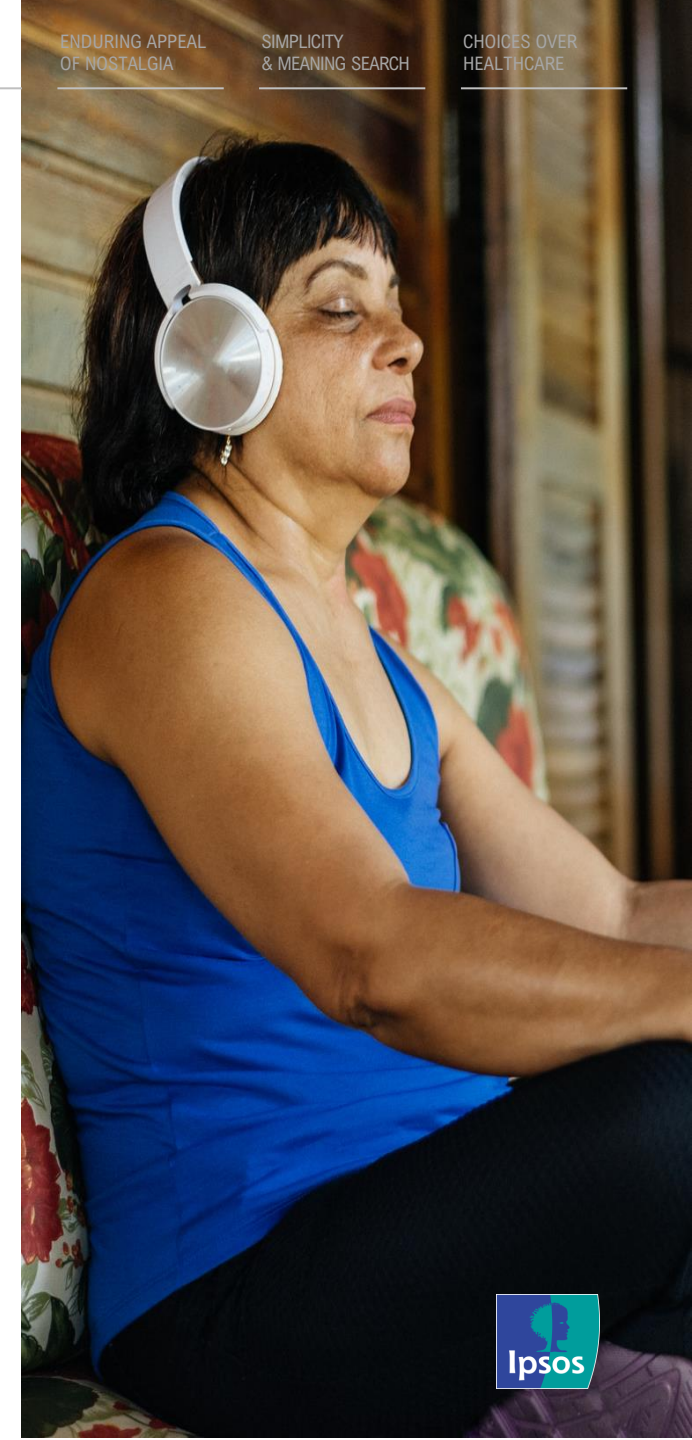
### Mental Health

Products and services which show empathy and support the public's consciousness and concern are likely to find takers. Employers can increasingly build initiatives to support employee mental well-being.

Online support centres and experts are likely to see more takers with an aspect of perceived anonymity and distance helping people open up more.

### Health-tech

The health-tech adoption is likely to sustain given the impetus reflected in the overall trend. Wearables and Apps and other tech companies should align with consumer needs for better success for adoption





Rank: 10  
Direction: Decline



Rank: 7  
Direction: Increase

# AUTHENTICITY IS THE KING

The days when corporations could focus on providing good products at good prices and expect the marketplace to respond favorably are fading fast. Increasingly, these aspects are taken for granted and consumers are looking at things beyond the product- like authenticity in a brand's image, ethical values, product origin, shopping experience, source of recommendations, etc. Authenticity plays a significant role in consumer behavior, and brands that can demonstrate authenticity through their image, social responsibility, and credibility can be more attractive to consumers



# Chasing for authenticity shows a decline among Urban Masses but increases among Digital Indians

## What it's about today:

The trend shows an interesting dichotomy between Urban Masses and Digital Indians. There has been a significant decrease in consumer perception and behaviour for certain attributes related to shopping and e-commerce amongst Urban Masses. Specifically, the Urban Masses have become less likely to believe that it is possible for a brand to support a good cause and make money at the same time. Consumers are becoming more discerning and critical of the e-commerce landscape. While there was a surge in online shopping during the pandemic, the Digital Indians are now moving back to brick-and-mortar shopping. The business may need to adapt to these changing attitudes in order to maintain its market share and appeal to consumers. Brands that prioritize social responsibility and transparency may be more likely to attract and retain customers, as well as those that offer a seamless online shopping experience and provide reliable, trustworthy recommendations.

Digital Indians are seeking authenticity and trust in their purchases, especially given the rise of counterfeit products and scams online. They may be willing to pay more for a brand that they perceive to be authentic, as they believe that this offers greater value for their money. Similarly, they may prefer shopping in traditional stores where they can physically see and touch products before making a purchase, which can help them to verify the authenticity and quality of the item. Trust and authenticity are becoming increasingly important factors for Digital Indians and brands that can build and maintain these qualities are likely to be more successful in the market.

Only

# 40%

Urban Masses find online shopping more difficult than traditional stores.

# Urban Masses are now comfortable with online shopping but have reduced trust in online reviews.



To what extent do you agree or disagree with the following statements?

% strongly agree

**I prefer to buy products from India rather than products from abroad**

**I trust online recommendations if they're from a well-known site / app**

**I am generally willing to spend extra for a brand with an image that appeals to me**

**It is possible for a brand to support a good cause and make money at the same time**

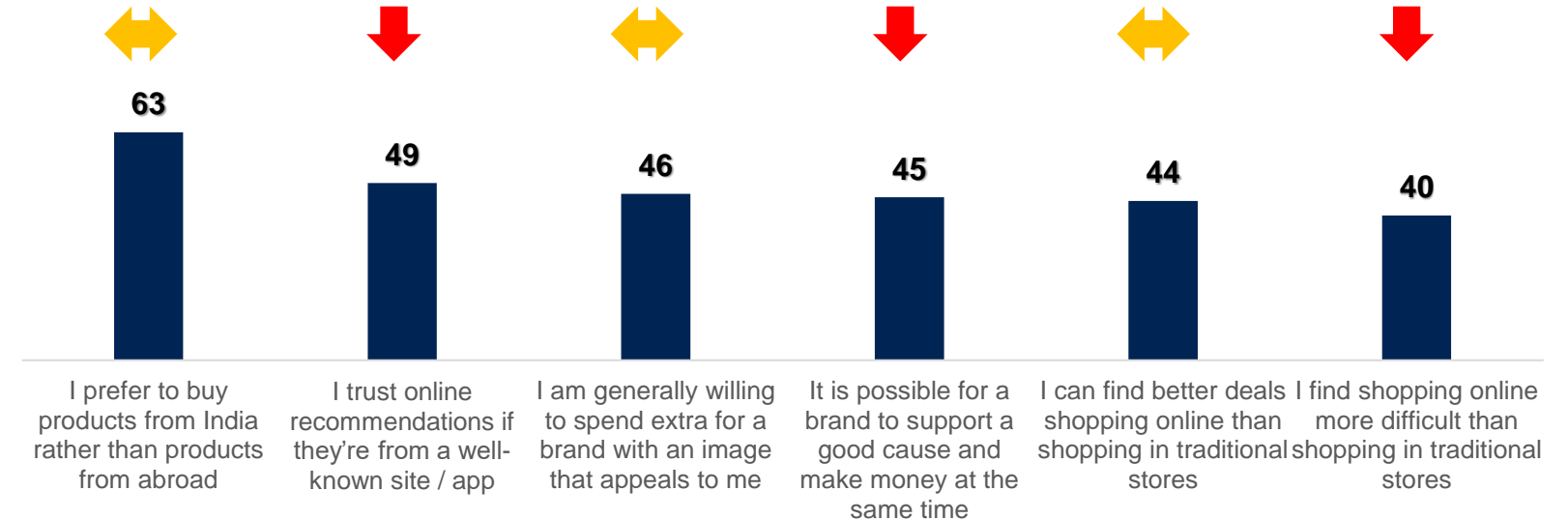
**I can find better deals shopping online than shopping in traditional stores**

**I find shopping online more difficult than shopping in traditional stores**

Base:

2000 Urban Masses

Direction



- West zone, tier 2 and 3 and youngsters are more comfortable with online shopping now and have starting doubting online reviews. South zone on the other hand, finds shopping at traditional trade much easier.
- East and North have reduced belief that a brand can support a good cause and also make money at same time
- Urban Masses from Tier 3 have displayed lesser inclination towards authenticity whereas South is chasing more towards it

# Digital Indians are finding more comfort in offline shopping than online



To what extent do you agree or disagree with the following statements?

% strongly agree

**I prefer to buy products from India rather than products from abroad**

**I trust online recommendations if they're from a well-known site / app**

**I am generally willing to spend extra for a brand with an image that appeals to me**

**It is possible for a brand to support a good cause and make money at the same time**

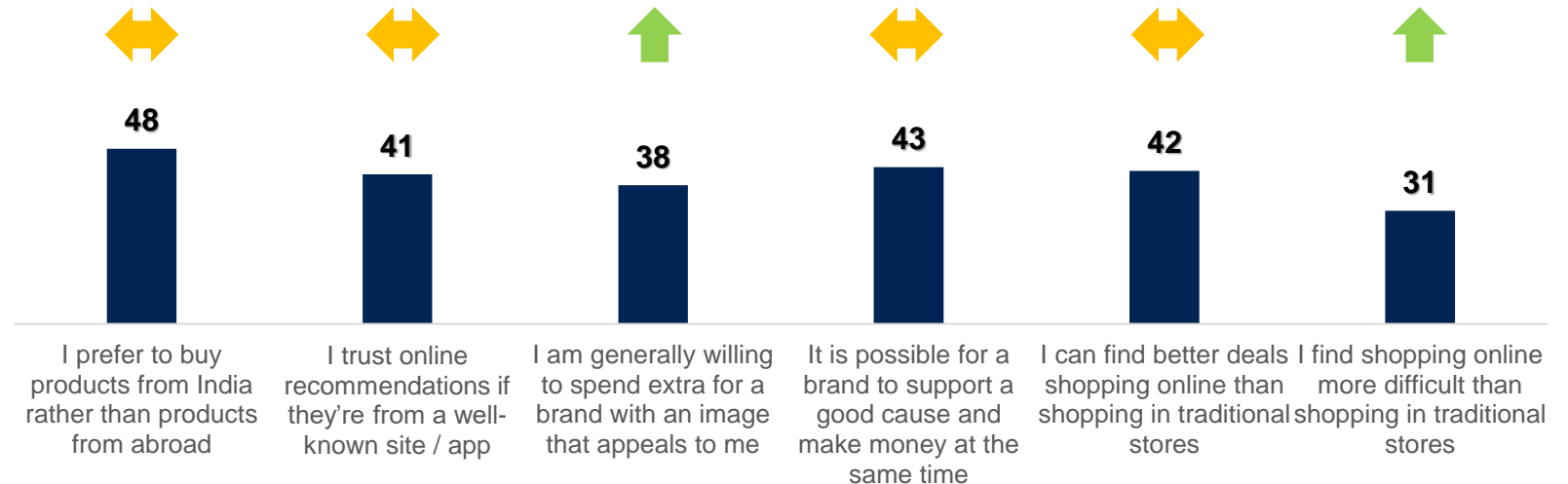
**I can find better deals shopping online than shopping in traditional stores**

**I find shopping online more difficult than shopping in traditional stores**

Base:

1000 Digital Indians

Direction



- Across zones and across age, clearly the trend among Digital Indians is shifting towards offline shopping. In fact Tier 2 lesser agrees that online is the only channel for better deals now.
- Those from Metro and youngsters are more willing to spend extra for a brand that projects the right image

## Signals

# ‘Examining the products’ driving people to brick-and-mortar; Indian origin, ‘artisanal’ sought

**The Ministry of Consumer Affairs has announced a framework to curb fake reviews on e-commerce sites**



Source: Times Of India

**Local artists, or reviving the local artisanal culture**



Source: Okhai.org

**Indians still want to touch & feel smartphones before buying: Report**



Source: Economic Times



## Thought Starters

# Build stronger, more authentic relationship with customers

### Build Trust

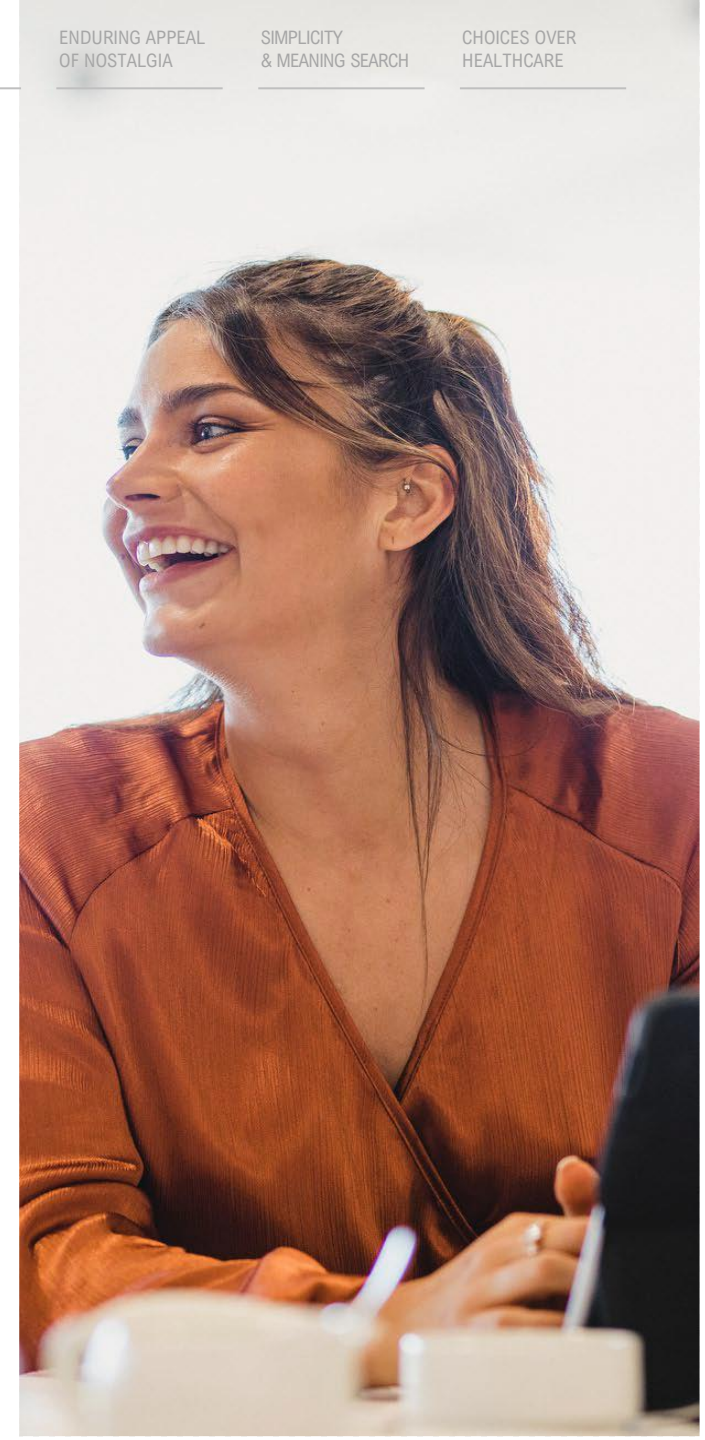
Consumers are apprehensive about online reviews on e-commerce platforms. Important to gain trust through the relevant communication

### Omnichannel

Consumers are moving towards brick-and-mortar retail formats, but at the same time, there are consumers who are buying online. Brands should work on their omnichannel strategy to build strong relationships with the consumers

### A 'Real' Cause

Build trust with customers and demonstrate the brand's values and mission. Choose a cause that resonates with your brand identity. Consumers want to see that the brand is making a real difference in the cause they are promoting.





Rank: 8  
Direction: Stable



Rank: 11  
Direction: Increase

## DATA DILEMMAS

Whether it's that eerily accurate ad that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they're doing with it. But how much do people *really* care? And perhaps more importantly, are they willing to do something about it?

Urban Masses seem to somewhat care about their data privacy but are not sure on how to tackle the onslaught of privacy invasions with the increase in online activity



# Indians do care about their data privacy and wish it to be not mis-used, however, lack of control on situation leading to acceptance, inevitably

## What it's about today:

With the need to move at the same momentum as the world when it comes to Digitization, most Indians do realize that data sharing is inevitable and unavoidable.

Urban Mass consumers have reduced concern now about their data sharing. The problem that remains is that the majority don't know who has their data, what is being done with it, and how they can prevent their data from being collected. On the other hand, Digital Indians are somewhat more conflicted as they understand that given their exposure, they are more susceptible to data fraud.

The alternative is not using social media platforms and online services at all, but this leaves no middle ground for those who are privacy-minded. There is also an increasing worry about the use of citizens' data by foreign governments like China and even their own. However, most feel that they have no control over these aspects.

While the newly introduced Digital Personal Data Protection Bill is a step forward in including an individual's consent, this notion of consent itself is debatable. People do not read terms of service agreements, and numerous exceptions, including many exceptions for the Indian government, do not provide complete comfort. While some are arguably more reasonable, others create privacy risks for Indian citizens and generate complex legal questions for companies and organizations operating in India.

Hence the responsibility lies with the Govt. and organizations privy to the data to have some semblance of protecting the rights of people w.r.t data privacy

Meanwhile, the Urban Masses are mostly happy to go with the flow.

# 55%

of Urban Masses feel it is inevitable that we will all lose some privacy in the future because of what new technology can do



# Concerns around data privacy decline, acceptance becoming norm



To what extent do you agree or disagree with the following statements?

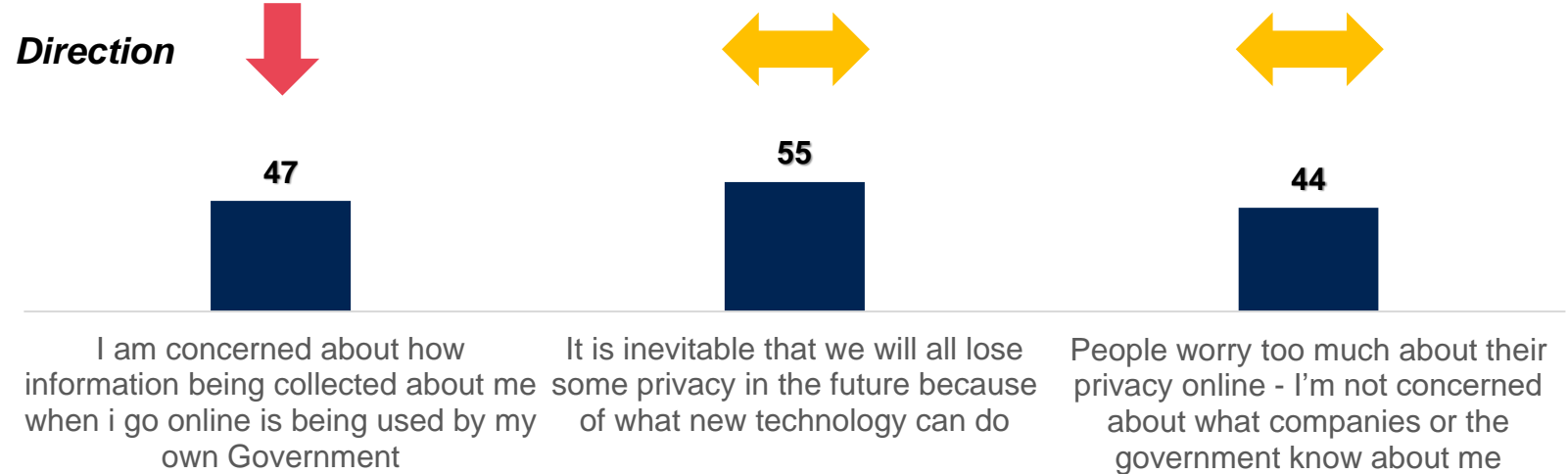
% strongly agree

**I am concerned about how the information being collected about me when I go online is being used by my own Government**

**It is inevitable that we will all lose some privacy in the future because of what new technology can do**

**People worry too much about their privacy online - I'm not concerned about what companies, or the government know about me**

Base:  
2000 Urban Masses



- Concern about data privacy declines significantly this year especially in North and East
- South sees a significant increase in concern, yet most also feel that this is inevitable
- Metros have the higher acceptance on data sharing.
- Tier 2 markets still very concerned- lack of exposure?

# Stability prevails, worries around data become lesser among Digital Indians



*To what extent do you agree or disagree with the following statements?*

*% strongly agree*

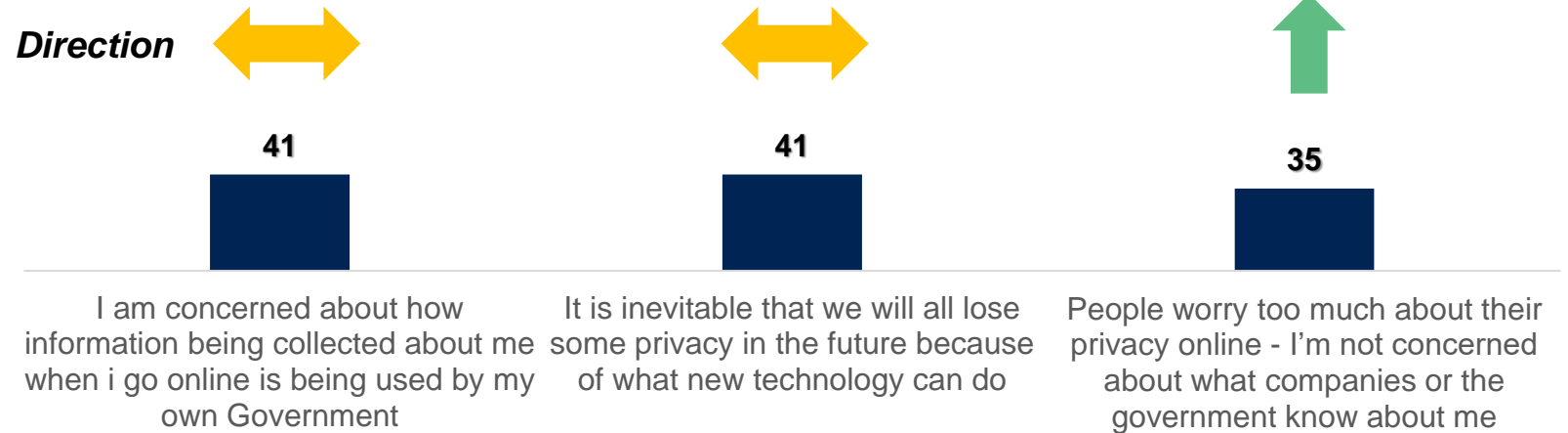
**I am concerned about how information being collected about me when I go online is being used by my own Government**

**It is inevitable that we will all lose some privacy in the future because of what new technology can do**

**People worry too much about their privacy online - I'm not concerned about what companies, or the government know about me**

Base:

1000 Digital Indians



- Among Digital Indians, all zones are relatively lesser worried about data privacy, the decline seen across
- Digital Indians, within Metros, particularly, are significantly lesser worried about what the Govt. knows about them
- Younger age groups (18-24 years), however, see an increase in concern around data privacy- given they are more aware/ privy to information could be a reason

## Signals

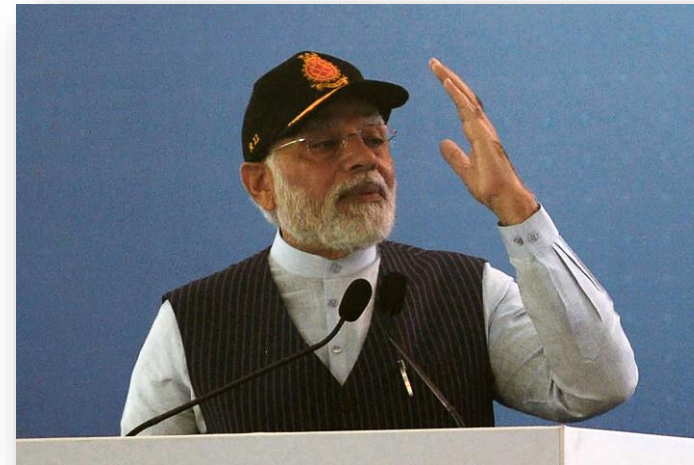
# Stronger data privacy laws needed to fuel a 'secure' growth of Tech; consumer need being addressed by Apple

### User Control over their own data



Source: BrandEquity, Economic Times; Apple TVC

### India's Sudden Reversal On Privacy Will Affect The Global Internet



Source: Slate.com



## Thought Starters

# Businesses cannot take access to private data for granted

### Data Sharing

What's the return on investment for customers who share their data? How can you communicate this simply and effectively?

How can the notion of consent become stronger? Is there a better way to communicate / and take consent?

### Transparency

If transparency in data practices continues, are you ready to let your customers see how your organization works?

Do you think privacy is a two-way street? In the interest of a seamless flow of information, are you ready to take a step forward?

### Addressing consumer fears

Is it possible to create more awareness about how the data that is obtained from the individuals is used? Can it be made simple to understand to eliminate 'fear' and ambiguity?



# GLOBAL TRENDS 2023



**Rank: 7**  
**Direction: Stable**



**Rank: 5**  
**Direction: Increase**

## THE TECH DIMENSION

Technology has undeniably pervaded all aspects of our lives. The rapid development in the eco-system around mobile telephony & initiatives around the 'Digital India' mission has changed the way we live our lives. The COVID-19 pandemic further boosted our reliance on technology. However, as its negative effects on children, mental health, security & privacy surface, the pace of evolution of the laws to mitigate these threats will determine whether we see technology as a boon or a bane.



# A growing trend only among Digital Indians; they remain conflicted on its impact

## What it's about today:

Affordable handsets & cheap data magnified adoption of mobile screens amongst the Urban Masses & Digital Indians alike. The pandemic further pushed our reliance on screens with work, learning from home & purchasing everything from groceries to appliances on apps. However, inequality in the depth of adoption contributes to how the two cohorts see technology today. The worries have increased among Digital Indians. While they are at the forefront of 'tech' adoption, they increasingly worry about how technology is destroying our lives.

For the Urban Mass consumers, the concern is more localized around social media and observed more in South & Tier 1 towns. Fake news, hate messages & use of online activity to drive personalized content are sparking a rising debate on the need for social media giants to regulate content & privacy on their platforms.

For consumers, the advancements in technology backed by government-led initiatives around 'Digital India', UIDAI (Aadhar) are not only bridging the Urban-Rural divide but also sharing the promise of harnessing 'Big Data' for social & economic development. Businesses as well have begun to leverage Big Data for personalized content & engagement.

However, rising fraud, the pressure of living up to the virtual social lives, increasing obesity & reducing attention spans of children have become real-world problems impacting the mental health of young & old. As metaverse & AI develop on the foundation of emerging 5G networks, the laws need to be dynamic & stay abreast of these advancements to ensure tech remains an enabler & not become our master!

**61%**  
of Urban Masses  
strongly agree that social  
media companies have too  
much power



# The Urban Masses are neutral on technology & its impact. The power wielded by social media companies is the dominant perspective



To what extent do you agree or disagree with the following statements?  
% strongly agree

**I am usually the first among my friends to try new things**

**Social media companies have too much power**

**I cannot imagine life without the internet**

**I fear that technical progress is destroying our lives**

**Direction**



43

61

46

48

I am usually the first among my friends to try out new things

Social media companies have too much power

I cannot imagine life without the internet

I fear that technical progress is destroying our lives

- The power of social media companies shows a noteworthy increase in Tier 1 towns – possibly as adoption increases & trickles down to these town classes
- A similar trend is visible among Urban Masses in the South

Base:  
2000 Urban Masses

# The Digital Indians at the forefront of adoption but conflicted on impact of technology



*To what extent do you agree or disagree with the following statements?  
% strongly agree*

**I am usually the first among my friends to try new things**

**Social media companies have too much power**

**I cannot imagine life without the internet**

**I fear that technical progress is destroying our lives**

Base:

1000 Digital Indians

**Direction**



**40**



I am usually the first among my friends to try out new things



**44**



Social media companies have too much power



**48**



I cannot imagine life without the internet



**34**



I fear that technical progress is destroying our lives

- The 18-24-year-olds in Metros are trendsetters (first to try new things) however more conflicted on the impact of technology on our lives

## Signals

# Brands adopting AI/AR to drive engagement & CSR initiatives. Digital Detox among other emerging themes

### AR revolutionizes user-engagement with ads

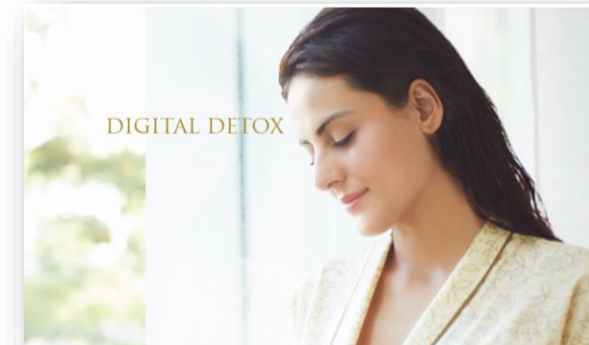


Source :brandequity.com; campaignasia.com; indianexpress.com

### Cadbury Celebrations gifts celebrity ads to hundreds of local businesses



### Digital Detox & Sustainability





## Thought Starters

# Ensure that technology is accessible to all, but not abused

### Tech Equity

Technology will be central to economic development as well as accelerate the achievement of the UN's 17 Sustainable Development Goals. However, as technology advances, we need to ensure that the infrastructure & cost structure is developed from the perspective of reaching the lower socio-economic & Rural communities.

### Tech policy awareness

Our IT laws need to be re-designed frequently, be made more robust & stay abreast of technological changes to uphold our safety & privacy.

How can organizations & individuals educate and spread awareness around the best practices of managing these at an individual level?

### Responsible behaviours

We need to prepare the youth of today for responsible online behaviour.

Is incorporating in the academic curriculum part of the solution?

### Online



**Rank: 9**  
**Direction: Stable**



**Rank: 7**  
**Direction: Stable**

# PEAK GLOBALISATION

Globalisation is now integrated into the Indian mindset and culture with rapid digitalisation and exposure to the world across economic strata.

# A stable trend among both cohorts, as the economic benefits of globalisation over two decades sink in and we identify ourselves as citizens of the world

## What it's about today:

Peak Globalization continues to be a stable trend among both cohorts, though not the most topical, as it has been an ongoing trend for more than a couple of decades. The growth in employment, income, and access to better infrastructure and technology over this period has led to confidence in the country's economy.

More recently, those who had reduced spending during covid are now eager to splurge on entertainment, travel, and lifestyle products like apparel & accessories, etc. There is also a resurgence of shopping in-store which was not possible during the pandemic, with continued engagement with e-commerce that grew during this period. With a strong belief that they are at par with citizens of the world, growing digital access and awareness, and the ability to pay, aspiring Indian consumers are demanding world-class products and experiences that global brands offer. Hence international brands, in both premium and luxury segments are seeing rapid growth fueled by this demand and their increased presence is in turn fueling this trend.

Global brands that had delayed their foray are now eager to make their mark with significant investments in India. India's young population, skilled talent pool, and rapid digital penetration make India a favorable investment destination with tech-enabled businesses that drive innovation and scale. The government's strong will to create macroeconomic stability by combating inflation, pioneering GST reforms, privatization, and infrastructure development supports this trend.

# 51%

Of Urban Masses & 45% of Digital Indians strongly agree that globalization is good for me personally



# Identity, at par with citizens of the world, remains stable for Urban Masses; want to enjoy similar lifestyles



To what extent do you agree or disagree with the following statements?

% strongly agree

**Globalization is good for me personally**

**I think Global brands make better products than brands that are just local**

**I would like to experience living in different parts of the world**

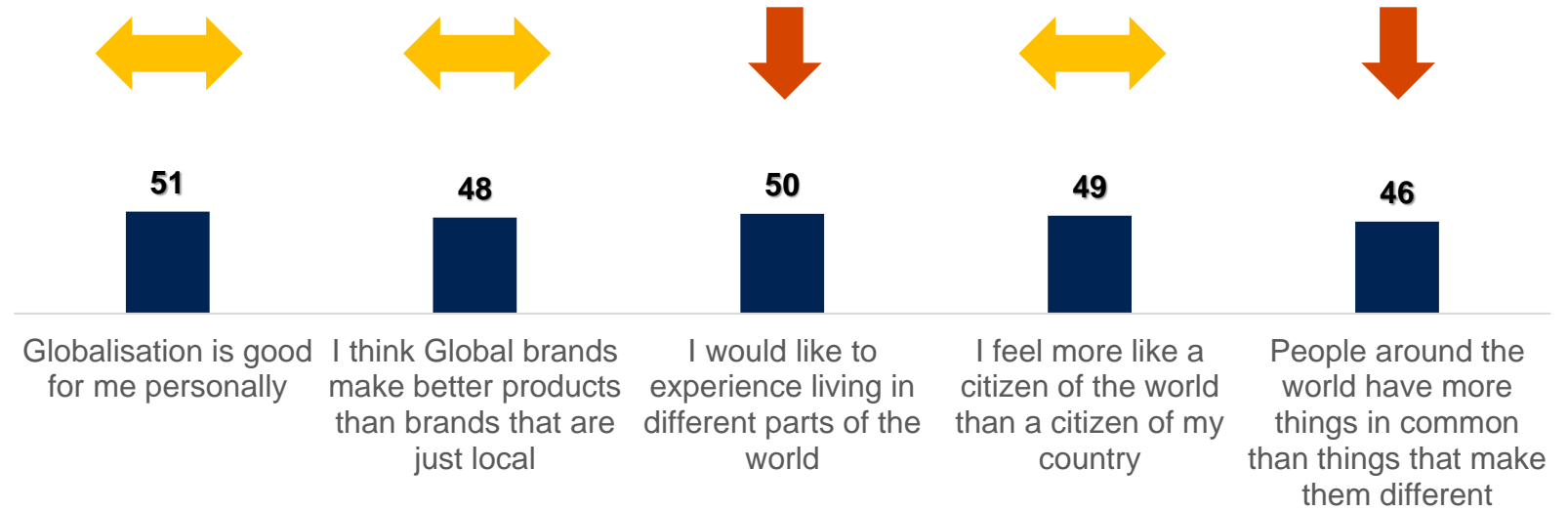
**I feel more like a citizen of the world than a citizen of my country**

**People around the world have more things in common than things that make them different**

Base:

2000 Urban Masses

**Direction**



- While the aspiration for experiencing life overseas is still high in the Metros, it loses a bit of sheen among the older ages and Tier 3 towns
- Higher agreement across statements seen in West Zone



# Among Digital Indians, the trend is mostly muted and stable; better perception of international brands



To what extent do you agree or disagree with the following statements?

% strongly agree

**Globalisation is good for me personally**

**I think Global brands make better products than brands that are just local**

**I would like to experience living in different parts of the world**

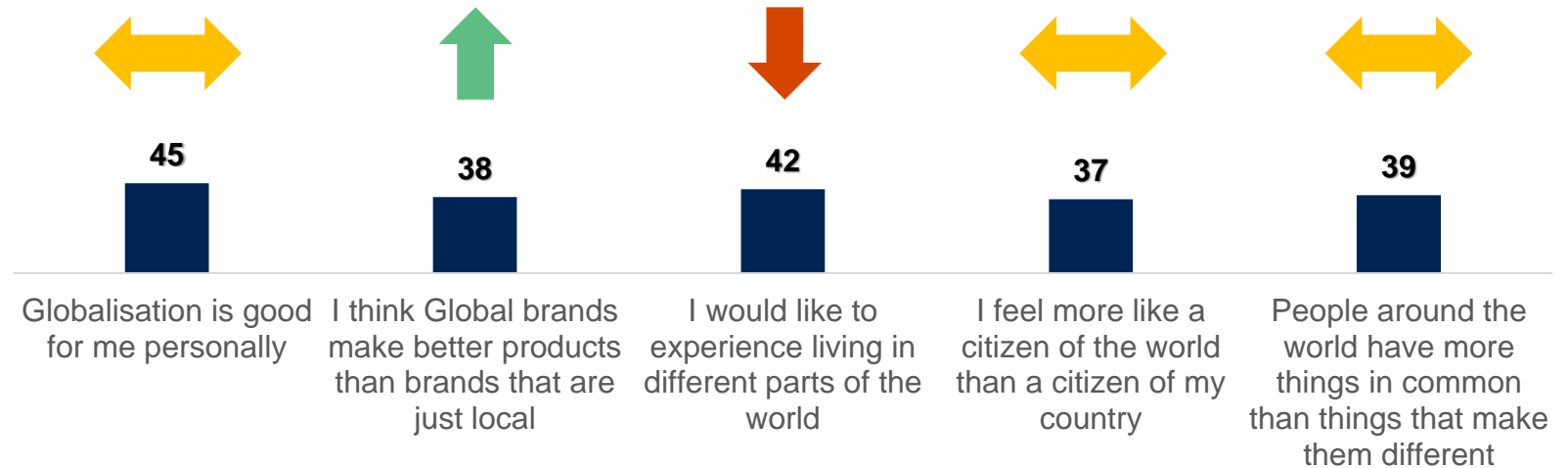
**I feel more a citizen of the world than a citizen of my country**

**People around the world have more things in common than things that make them different**

Base:

1000 Digital Indians

**Direction**



- Among Digital Indians appreciation of Global brands is rising especially in Metros, across Zones and age groups
- Some waning in desire to experience living abroad seen among 18-24 year olds especially in Tier 1 towns.

## Signals

# Global brands act to tap into the Indian aspirations as part of their growth strategy

**Over 28 Lakh Indians Went Abroad for Work in Past 2.5 Years, about 4 Lakh to ECR Countries: Govt Data**



Source: Indiatimes.com

**Reliance Industries and Pret-A-Manger have plans to establish and expand in India beyond the metros**



Source: timesnownews.com

## Thought Starters

# Global brands need to navigate this Indian opportunity with care

### Cultural Intelligence

As global brands seek to captivate the Indian consumers, they need a good understanding of the local culture to navigate this market successfully. Some localization, without losing the essence of the original brand would be a right way to move forwards. Ex –McDonald's

### Communication and messaging

The digitally native Luxury consumers are now well-educated and well-traveled, understand true quality and craftsmanship, and demand exceptional service levels. The call for customized products, perhaps exclusive to India, could be the answer.

### Lower Tier markets

Though a high consumption base exists in the Metros, in mass-premium segments like casual apparel, beauty, and personal care, the future growth would be maximum from lower-tier towns, with a larger and growing youth population with rising aspirations.







**Rank: 2**  
**Direction: Increase**



**Rank: 1**  
**Direction: Decline**

## A DIVIDED WORLD?

‘Live and Let Live’ is what Indians are believing in today. Urban Masses are clearly becoming more open to individualistic expressions but the Digital Indians who faces the brutal social media reality is becoming more closed to this thought now.

The pandemic had led to a renewed reflection on what it means to be “REAL YOU” in terms of our everyday beliefs and practices. What happens to us as individuals, defines the nation.



# A leading trend for both cohorts, with Urban Masses being more open towards individualistic expressions

## What it's about today:

'A Divided World?' trend shows an increase among the Urban Masses, whereas, among the Digital Indians, there is a decline, though still a no. 1 trend. The Digital Indians, who had focused on health and displayed openness in attitude during the pandemic, are now displaying a more normalized behaviour.

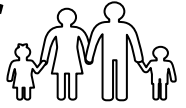
India has recognized third sex and homosexuals as equal citizens. In the past few years, some brands have showcased inclusivity in their advertising and communication. A new generation of filmmakers is redefining the roles of the LGBTQ community. But there is way more to achieve here - The LGBTQIA+ community still faces challenges such as racism, sexism, poverty, homophobia or transphobia, and denial of access to resources such as medical care, justice and legal services, and educational opportunities.

Besides the usual divides, Indians also face the 'access' divide, basically, there is varied access to digitization and infrastructure faced by gender, town class, socio-economic and literacy levels. In any society, economic growth without shared prosperity ultimately spawns' instability. In India today, people who feel left out of the nation's recent growth are actively seeking inclusion. At the same time, those who have been empowered by India's economic revolution are demanding fast and sustainable reform

# 67%

of Urban Masses strongly agree that transgender men and women should be free to live their lives as they wish, but only 49% Digital Indians strongly agreed to the same...

# Among the Urban Masses media seems to have well influenced the upper town classes to display more openness to individualistic expressions



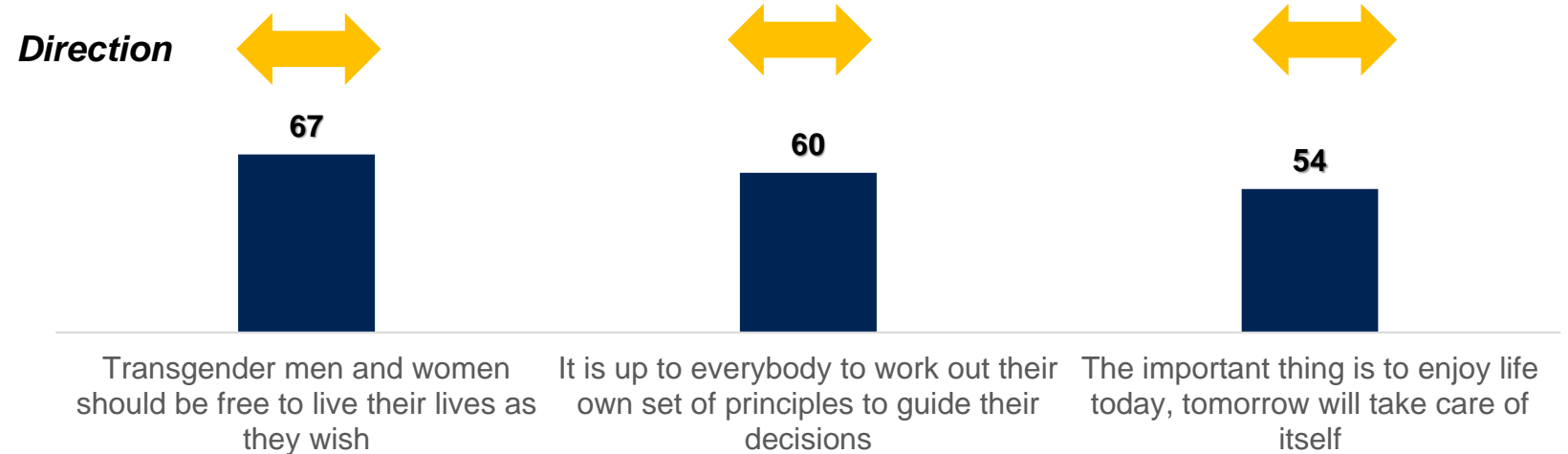
To what extent do you agree or disagree with the following statements?  
% **Strongly Agree**

**Transgender men and women should be free to live their lives as they wish**

**It is up to everybody to work out their own set of principles to guide their decisions**

**The important thing is to enjoy life today, tomorrow will take care of itself**

Base:  
2000 Urban Masses



- South and West display a contrasting trend on “living for the moment”, wherein South seems to be opening up here but West is taming down on this expression, just like Tier 3.
- Increased openness to transgender seen in Metro and Tier 1 parts of India

# But India is still socially awkward in many of the areas which include accepting LGBT in the mainstream.



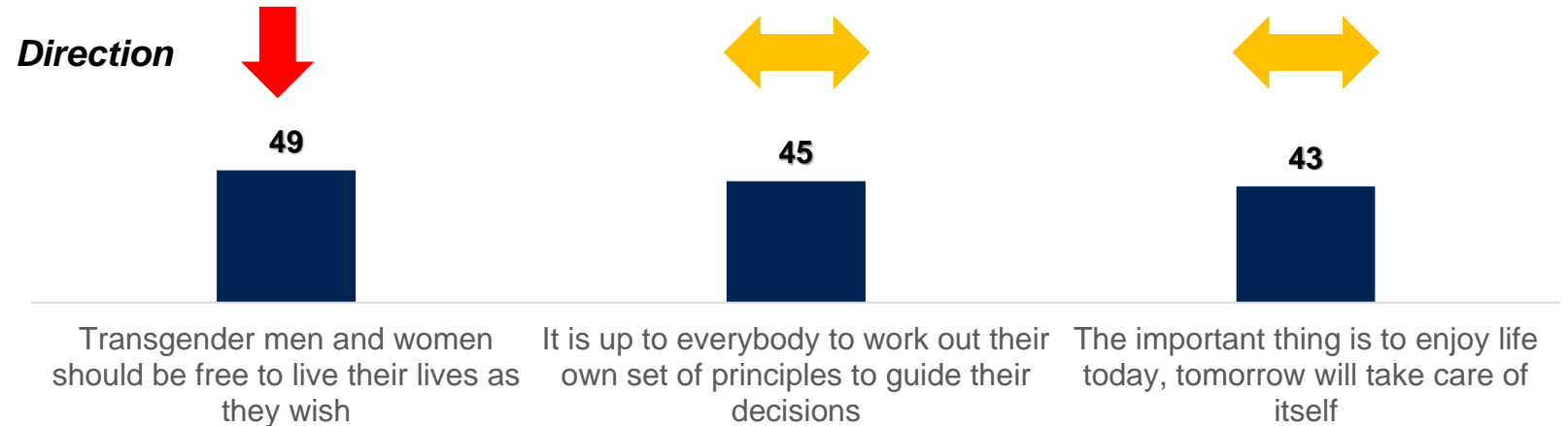
*To what extent do you agree or disagree with the following statements?*

**% Strongly Agree**

**Transgender men and women should be free to live their lives as they wish**

**It is up to everybody to work out their own set of principles to guide their decisions**

**The important thing is to enjoy life today, tomorrow will take care of itself**



- Digital Indians from the South and East India, that too from the Metro and Tier 1, seem to be shutting down towards transgenders. Surprisingly this is seen among the youth (18- 34 years)
- Pessimism about future is creeping among the 25 -34 years old but 45+ is growing more optimistic.

**Base:**  
1000 Digital Indians

## Signals

# LGBTQ gaining acceptance but the path still full of challenges.



Source: Business Today

## LGBTQ ad in India pulled after backlash. But could it pay off?



Source: Aljazeera



## Thought Starters

# Businesses need a serious calculation when they are pushing the needle on societal or cultural agenda

### Working on (mis)assumptions?

With the multiple factors interacting, it will no longer be wise to assume that the urban upper end is more receptive to progressive messaging.

Brands should investigate any new, socially, or culturally relevant themes to gauge which way the attitudes are shaping up to serve the sensitivities appropriately.

### Digital media suitability

Television is the broadcast medium while Digital media allows for micro-targeting and hence can be used to create more opportunities for individualistic expressions, to minimize alienation





**Rank: 6**  
**Direction: Increase**



**Rank: 5**  
**Direction: Increase**

## CAPITALISM'S TURNING POINT

If we look at an average individual's goal in a capitalist society, it is to accumulate wealth, secure one's financial future, and provide for the family and dependents.

Post-COVID, the income disparities have increased, but so have an individual's career/financial aspirations. A fine balance between capitalism and inclusive growth is the need of the hour

# Growing Inequality in the Country: Is enough being done?

## What it's about today:

As per the 'World Inequality Report 2022', India is among the most unequal countries in the world. In India, the top 5 percent own nearly 62 percent of the total wealth.<sup>1</sup> And this inequality has increased post the Covid lockdowns.

India has the third-highest number of billionaires in the world, but during the pandemic, an additional 75 million Indians became poor.<sup>2</sup>

CSR has grown at approx. 15% annually in the last 7 years, but it is largely driven by the compulsory mandate by the government.<sup>3</sup> On the other hand, private or super-rich family philanthropy is declining.

More people now trust their business leaders, to tell the truth, and the difference they can make economically and to one's career aspirations.

But among Urban Masses (who have been vastly impacted by the pandemic) there is the gnawing worry that the growing income divide is leading them to stay behind economically and socially. They are also aspiring to do better in their careers.

At the same time, we find that concerns for income disparity are higher in Tier 2 cities. On the other hand, concerns among Digital Indians are lower.

India is placed precariously when it comes to fully embracing capitalism and looking at more holistic growth. One thing is given - without "substantial inclusion" of all fractions of the social pyramid, we cannot transform into a truly developed economy.

1 - <https://www.deccanherald.com/opinion/in-perspective/india-s-billionaires-and-billion-others-1189321.html>

2- *Annual Survey of Industries - Deeper chasm: Editorial on sharp income inequalities in India - Telegraph India*

3 - <https://www.bain.com/insights/india-philanthropy-report-2022/>

# 59%

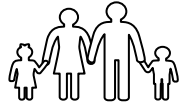
of Urban Masses feel that achieving a prominent position in their career is important, highlighting aspirations of the middle class

*"Capitalism's spontaneous tendency is to produce wealth at one pole and poverty at another"*

- Karl Marx



# Stable reactions to trust on business leaders, achievement in career and wealth disparity



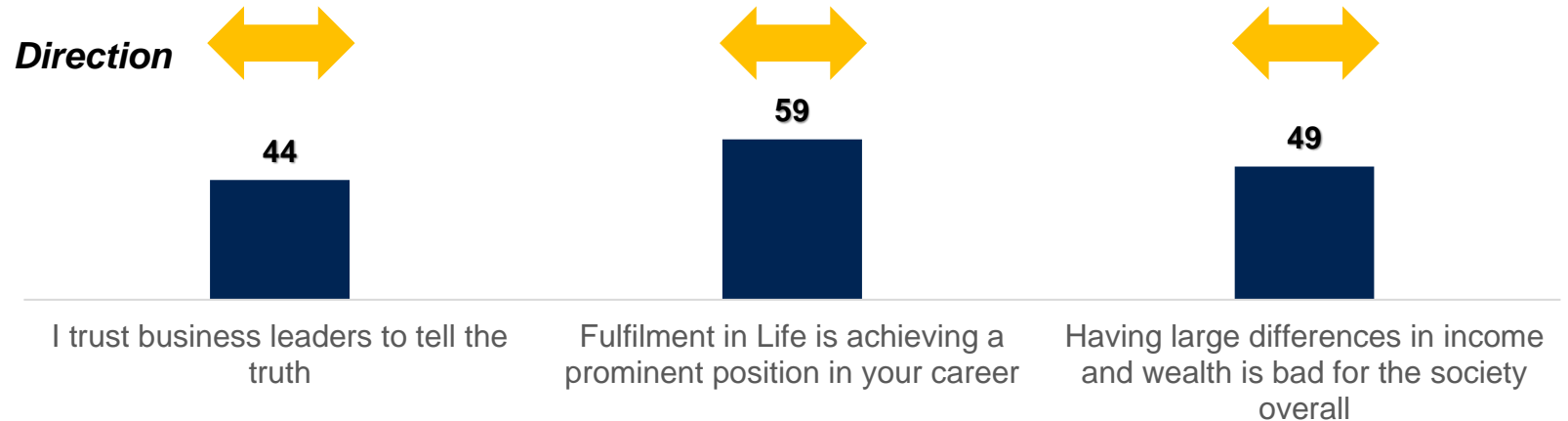
*To what extent do you agree or disagree with the following statements?*

*% strongly agree*

**I trust business leaders to tell the truth**

**Fulfilment in Life is achieving a prominent position in your career**

**Having large differences in income and wealth is bad for the society overall**



- Trust in the business leaders has ...
  - Declined in the North, but increased in South and East
  - Higher in Metros/ T1 towns
- Achievement in career gains more importance in Tier 1 towns
- Concerns over wealth disparity higher among Tier 2 towns

**Base:**  
2000 Urban Masses

# Among Digital Indians, higher belief in capitalist institutions



*To what extent do you agree or disagree with the following statements?*

*% strongly agree*

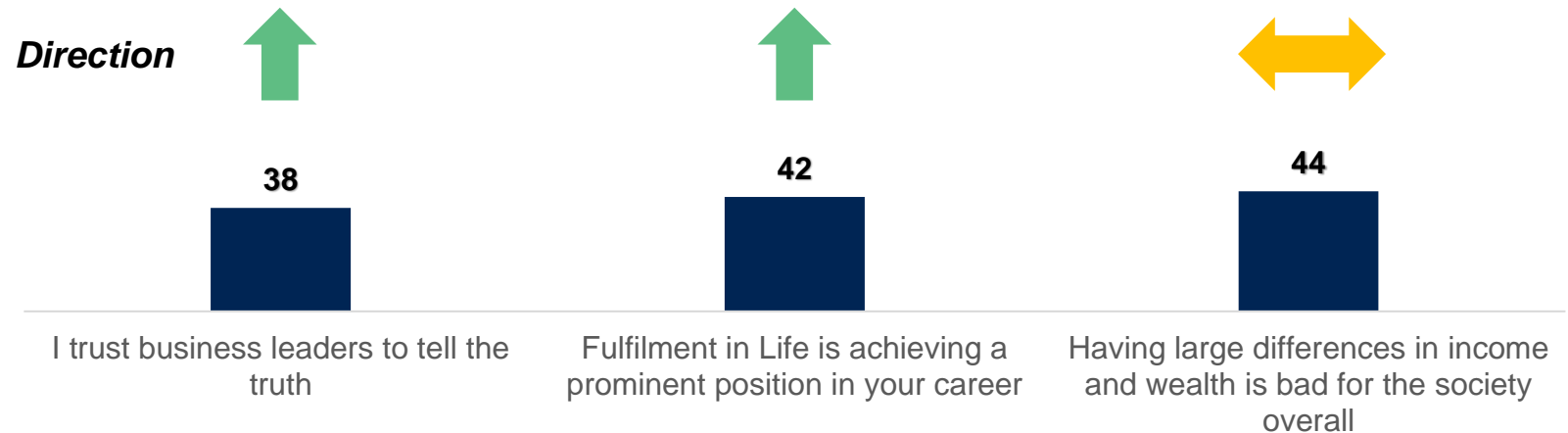
**I trust business leaders to tell the truth**

**Fulfilment in Life is achieving a prominent position in your career**

**Having large differences in income and wealth is bad for the society overall**

**Base:**

1000 Digital Indians



- Among Digital Indians, achievement in career gains importance in West and Tier 1 towns
- Trust in business leaders has increased in South

## Signals

# Income and Wealth Disparity in India is among the highest globally

Luxury vehicle sales in India grew in strong double-digits in first half of 2022



Source:Economic Times

India amongst the most unequal countries in the world, says report



Source: ET Prime

## Thought Starters

# How do brands thrive with a new model of doing business?

### Consumer Value

Do you truly know what your consumer's value – and does that trump what your shareholders value?

### Bring in ESG

Does your business model really serve stakeholders or society? How can you incorporate ESG impacts and give back to society?

### Newer markets

Important to look at how your business can impact the less affluent, through a better understanding of these consumer groups, especially in the lower tiers.







**Rank: 2**  
**Direction: Increase**



**Rank: 4**  
**Direction: Stable**

# REACTIONS TO UNCERTAINTY AND INEQUALITY

Uncertainty seems to be creeping among Urban Masses mainly due to the worry of fast pace of the world which they are unable to keep up with. They worry about the health and well being of their future generation, but nothing will slow them down as they will continue to chase for opportunities.

Home has become the focal point and it is the woman who plays a strong role. Hence, majority Indians want woman to play a more conventional role now as mothers and wives.

# Role of Women in society goes through changes among the Urban Masses

## What it's about today:

Uncertainty & inequality' has become one of the leading trends among the Urban Masses, whereas, among the Digital Indians, it is average and stable. Those that were vastly impacted, i.e., Urban Masses, feel that they are losing out. Digital Indians feel like they have not lost out as much due to the pandemic (or have made up); as a result of which, their concerns are also fewer.

71% of the Urban Masses continue to worry about the fast pace of the world. As globalization affects every sphere, whether it is political, social, cultural, or economic, only 53% of the Urban Masses feel globalization is good for them personally. Interestingly, Digital Indians are significantly lesser worried about this pace of the world than they were during the pandemic. They have managed to gradually blend with the world via their digital habits, allowing them to come much closer to various economies and cultures via media, travel, and businesses.

Statistics show more women lost employment during the pandemic and increased violence against women. All-in-all women's status and progress took many steps backward. As lives are normalizing into regular roles now, there is a growing sense amongst urban masses that women are better off as wives and mothers at home. Digital Indians on the other hand, are probably being driven by greater practicality in their attitudes towards women - working women contribute to household income and decision-making. |

# 61%

Urban Masses  
strongly agree that the  
role of women in  
society is to be good  
mothers and wives



# Pride and trust in own country remains high, but the pace of world and wellbeing of future generation worries the Urban Masses



To what extent do you agree or disagree with the following statements?  
% strongly agree

**I feel very proud of my country**

**The world today is changing too fast**

**My children's health and well-being is more important than their happiness**

**The role of women in society is to be good mothers and wives**

**It is important that Indians remain very different from all other nationalities**

**There are too many immigrants in India**

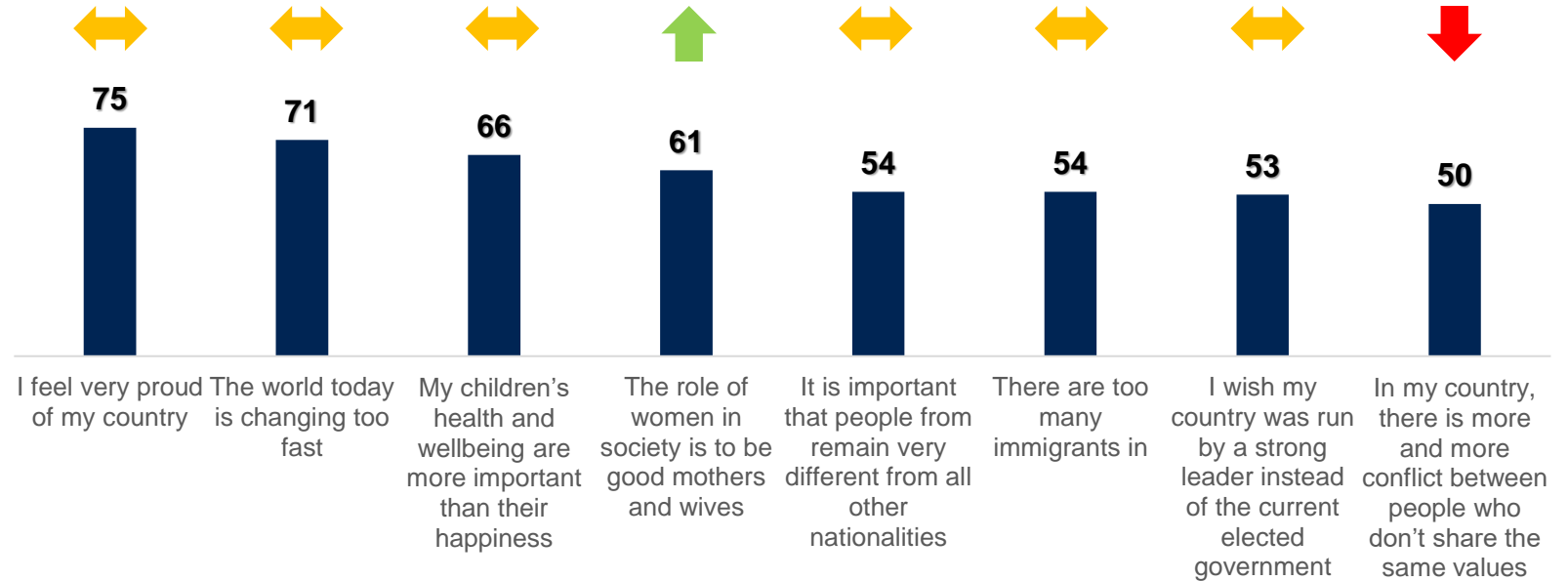
**I wish my country was run by a strong leader instead of the current elected Government**

**There is more and more conflict between people who don't share the same values**

Base:

2000 Urban Masses

**Direction**



- The fast pace of the world has led the Tier 1 and South India to worry more than before, whereas Tier 3 and East India feel the opposite
- The mid aged (25 – 44 years old), increasingly wish to the draw the woman back towards home to look after their families, more so from South and East India,
- In fact, South India has heightened worry across most of above aspects

# Digital Indians have a reduced concern of the fast pace of world. Pride for own country faces a drop.



To what extent do you agree or disagree with the following statements?

% strongly agree

**I feel very proud of my country**

**The world today is changing too fast**

**My children's health and well-being is more important than their happiness**

**The role of women in society is to be good mothers and wives**

**It is important that Indians remain very different from all other nationalities**

**There are too many immigrants in India**

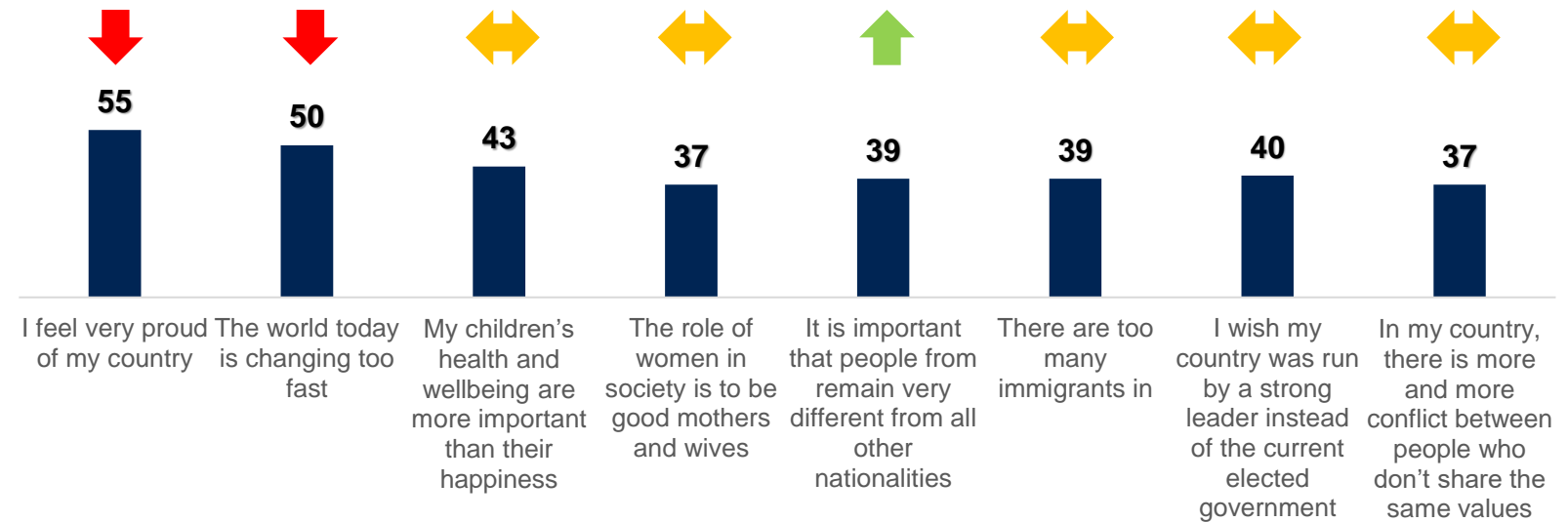
**I wish my country was run by a strong leader instead of the current elected Government**

**There is more and more conflict between people who don't share the same values**

Base:

1000 Digital Indians

**Direction**



- 25 – 34 years old Digital Indians, more so from the Tier 1 and those belonging to the North and East zones are now lesser worried about the fast pace of world
- The youth (18 -24 yr) and the older generation (45+), more so from the Metros as well as Tier 3, have increasing desire for India to shine in the world



## Signals

**Issues regarding the regression of women's participation beyond traditional roles have been recognized, slowing down is a need**

**The digital divide and is it holding back women in India?**



Source: Hindustan Times

**What reports on Indian women's falling participation in labour force don't tell you**



Source: The Print

**Indian Village Disconnects With 'Daily Digital Detox' Initiative**



Source: Voanews.com

## Thought Starters

# Monitor, Manage and Minimize the impact of uncertainty and inequality.

### Women Empowerment

**Education, second innings at work, skilling and upskilling** all can help women recover better from the pandemic and brands look for different ways to support and start these initiatives and the messaging

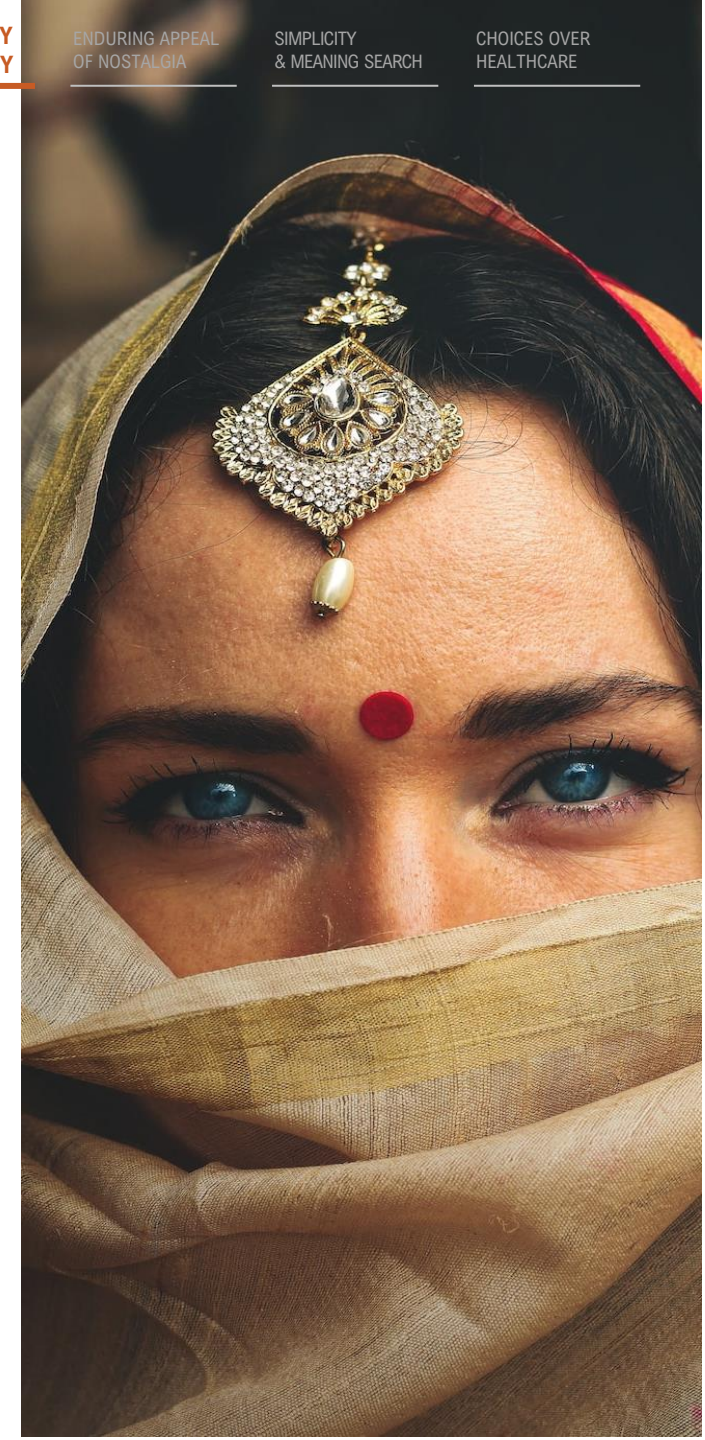
The **media** can perform a crucial role in 'repairing' the attitude and conversations on the role of women, husband-wife relationships, society's expectations etc.

Themes for media houses and movie productions to note, as much as for advertising.

### Fast Paced life may have lost its lustre

**Aspirations, lifestyle choices** will see a turn if the fast-paced life is not the goal for the urban masses.

Staying on the consumer pulse will benefit brands for their innovations and portrayals.





# GLOBAL TRENDS 2023

## SWEET, SWEET NOSTALGIA



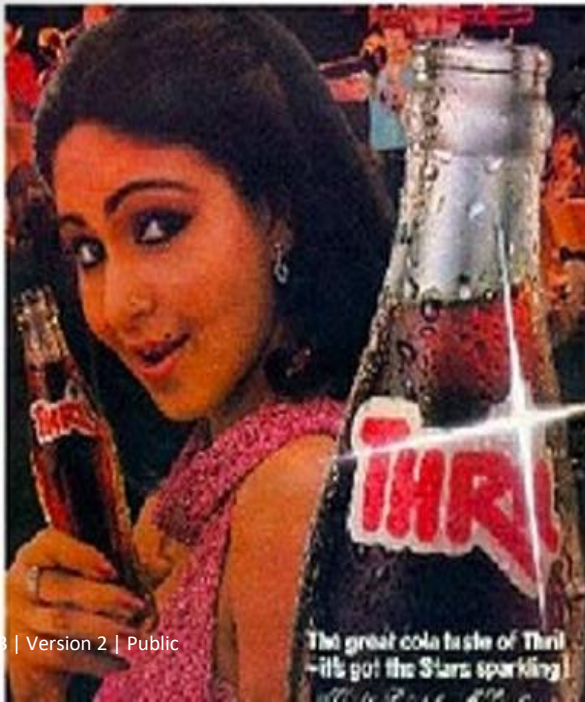
Rank: 12  
Direction: Decline



Rank: 7  
Direction: Increase

## The Enduring Appeal of Nostalgia

‘We live in uncertain times’ is a common phrase. These uncertain times are marked by global pandemics, ever-increasing climate/ natural disasters, international conflicts, and disruptive technology. In such situations people are faced with two means of escape: look back to when times were happier and simpler or try to look ahead to when times will get better. Evidence abounds that people all over the world, and of all ages are falling to the appeal of nostalgia.



# Nostalgia serves as a time machine to go back to simpler times

## What it's about today:

Dynamic times and crises – big or small – heightens the desire to go back to past/ simpler times. The urban masses show a decline in this trend and don't wish to really go backward in life. They are so caught up with making up for lost time, they are fascinated by all things modern and shiny and want to fully embrace the pleasures of the modern world and the progress and pleasure they bring.

The survey shows feelings of nostalgia are highest in Asia with Indian citizens appearing in the top 3 countries. When today's world and context seem more complex or uncertain, people of all ages can find comfort in thinking about older and simpler times.

Digital Indians are driving this trend, there is likely digital fatigue owing to increased and prolonged exposure to all things digital.

Nostalgia helps to strengthen relationships – an instant connection through shared times and memories.

Nostalgia is evoked in different aspects of our lives – be it music, fashion, food, travel, or leisure. It has been capitalized well by the marketers and brands and Nostalgia products and marketing have gained huge traction.

The need for simplicity and nostalgia is mainly to find momentary solace – the revival of Caravan radio, the revival of retro music, and fashion trends are good examples.

# 41%

of Digital Indians strongly agree that given the choice, I would prefer to have grown up at the time when my parents were children



# Moving ahead with the times is what most Urban masses feel, except in South India



To what extent do you agree or disagree with the following statements?  
% strongly agree

**These days I feel like a stranger in my own country**

**Given the choice, I would prefer to have grown up at the time when my parents were children**

**I would like it to be the way it used to be**

**Direction**



36



These days I feel like a stranger in my own country



47



Given the choice, I would prefer to have grown up at the time when my parents were children



51



I would like to be the way it used to be

- West and North show a decline on most of these aspects and do not wish to go back to older times, mainly led by Tier 3 and older age group
- Whereas South seems to feel more nostalgic, mainly Metro and Tier 1

**Base:**

2000 Urban Masses

# Disconnecting-time alone and slowing down sought by those in metros and Tier 1 cities



*To what extent do you agree or disagree with the following statements?  
% strongly agree*

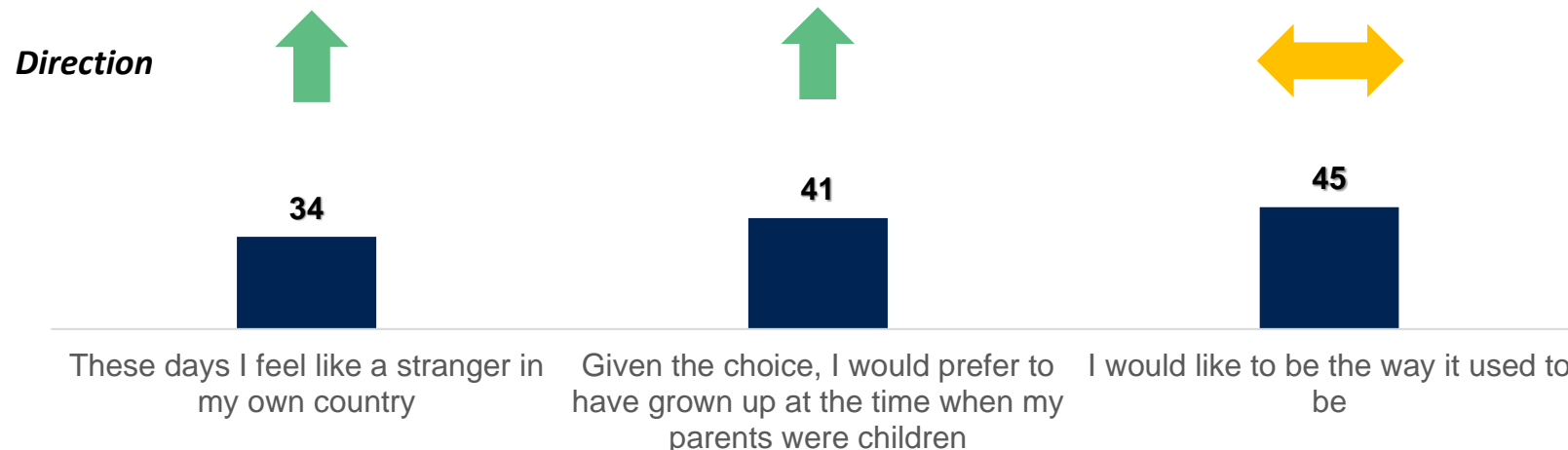
**These days I feel like a stranger in my own country**

**Given the choice, I would prefer to have grown up at the time when my parents were children**

**I would like it to be the way it used to be**

Base:

1000 Digital Indians



- Among Digital Indians, across zones except East are feeling more nostalgic, mainly from Metro
- 25 – 34 years old and 45+ increasingly wish to go back to the times when their parents were kids

## Signals

# Older themes, jingles, product coming back with a strong emotional connect

Indian brands transporting consumers to older times with their campaigns



Source: Storyboard18.com

Driving Product Innovations



Source: Forbes India



## Thought Starters

# Help customers to find the feel-good factor

### Reviving old connections

How can you leverage your heritage to tell a story and help consumers connect with the brand and the story evoking memories?

### Applicable across sectors

Nostalgia can be about an era, time, location, habit/behaviour and not always about the brand/product. This opens up many sectors and applications of this trending theme

### Nostalgia can be recent past for younger audience

Don't reject nostalgia as a tool just because your target audience is Millennials or Gen Z. They are just as likely to have a recent past that they feel nostalgic about; creating experiential marketing events can help showcase products in a fun and memorable way





**Rank: 12**  
**Direction: Decline**



**Rank: 7**  
**Direction: Increase**

# SEARCH FOR SIMPLICITY AND MEANING

The pandemic accelerated quite a few changes and led to choices that otherwise would not have been possible. People are now re-evaluating their life, their hopes, ambitions and their spending patterns. They are aspiring for a simpler, yet more fulfilling life.

# Digital Indians seek a simple life and wish to slow down the pace of their life

## What it's about today:

In general, this trend is of relatively low importance among Urban Masses who are not chasing simplicity now, in fact, they are chasing to catch up with the fast-paced world.

As the proverbial statement, CoVID-19 triggered a reset button for many, weighing the priorities, and seeking balance and meaning has been the hallmark of post-CoVID-19 adaptation. In India, Digital Indians are seeking more simplicity in their lives, driving an increase within this cohort.

By many objective measures, life is busier today than ever. Good sleep has become the new well-being aspiration. Slowing down, seeking balance, and saying no is seeming to be the new normal.

Post-pandemic, many people wanted to make up for all the time they lost. An equal or more number have chosen to calibrate their priorities, and minimalism is on the rise. The desire to control one's time and engagement manifested into moonlighting. Most employees call it their choice to do what they want in their free time.

The pace and complexity of life and our collective inability to tune out are spawning a huge spin-off industry: hotels that boast of poor Wi-Fi connectivity as a benefit, and meditation and mindfulness apps are just some of the ways

# 45%

of Digital Indians wish that  
their life was more simple

# Younger Urban mass consumers are not looking at simplicity in life



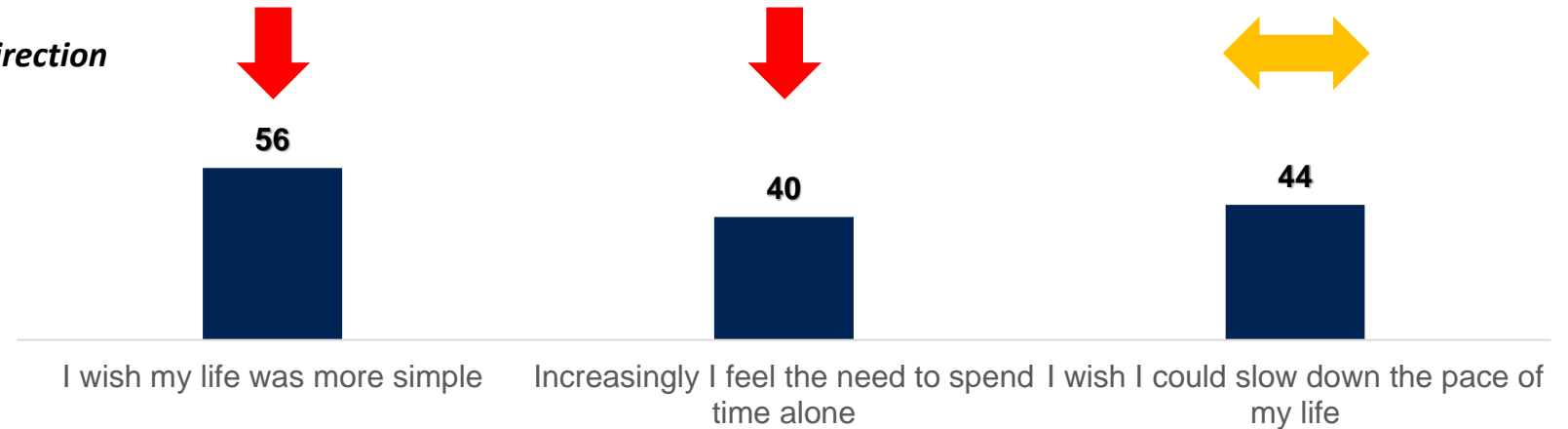
*To what extent do you agree or disagree with the following statements?  
% strongly agree*

**I wish my life was more simple**

**Increasingly I feel the need to spend time alone**

**I wish I could slow down the pace of my life**

**Direction**



- West and North zone, especially Tier 3, are much lesser keen for simplicity than before whereas South and East would like to have more time alone, to unwind.
- Youngsters (18-24 and 25- 34 years) are not looking for simplicity as much as they really need to catch up with the fast pace of the world

**Base:**  
2000 Urban Masses



# Mid to older age Digital Indians are in search for more Simplicity and Meaning now



*To what extent do you agree or disagree with the following statements?*

*% strongly agree*

**I wish my life was more simple**

**Increasingly I feel the need to spend time alone**

**I wish I could slow down the pace of my life**

**Direction**



**45**



I wish my life was more simple



**39**



Increasingly I feel the need to spend

time alone



**37**



I wish I could slow down the pace of

my life

- Among Digital Indians, the search for simplicity increases for 35+ years old and tier 3.

**Base:**

1000 Digital Indians

## Signals

# Strong and multiple signals for this trend in different sectors

### Trends like moonlighting and Quiet quitting gaining momentum



Source: Peoplematters.in

### Rise in solo travel



Source: Outlookindia.com

### Back to conventional wisdom



Source: Indianexpress.com

### Slow Content



Source: Financialexpress.com

## Thought Starters

# Simplicity will remain important, experiential products and services aiding simplicity in life can help brands

### As an Employer...

As employers what can you do to recognize this shift and provide better work-life balance?

### Brand to position as enablers

Keeping your services, and products simple and less demanding on mental resources. Positioning a brand as easy going, helping live a simpler life, can establish a better connection.

### 'Me-Time' experiences

Experiential products and services, that help to switch off, enable reflection, and allow "me time" or provide a sense of better control and decision when well positioned can help the brand





Rank: 1  
Direction: Stable



Rank: 2  
Direction: Decline

## CHOICES OVER HEALTHCARE

Clearly, the pandemic required government interventions, new rules, and stern enforcement. However, the longer-term trend has been for people to want more direct access to healthcare and more control over solutions and outcomes.

The pandemic has reinforced the need for healthier lifestyle choices. **Digital Indians** proactively discuss preventive check-ups, immunity & get vaccinated. The positive development is that the Digital Indians are slowly moving towards a pre-pandemic life & are not in panic mode now.



# People continue to want control over their own health outcomes: high priority among both Urban Masses and Digital Indians

## What it's about today:

The pandemic has made consumers realise the value of health, and the importance of preventive healthcare. Hospitals and clinics across the country are seeing a rise in preventive health checks ups, with increased focus on both physical and mental health.

Our data says 67% of Urban Masses living in the metros agree on the question of taking control of the decisions about their health.

Indians are prioritizing health and fitness goals, evaluating their lifestyles and adopting healthier choices.

Technology also had a role to play during the pandemic in the healthcare sector. Online consultations and home diagnostics became common during the pandemic, providing wider reach and access.

On a separate note, we have come a long way from initial vaccine hesitation - 68% of Urban Masses believe vaccines are valuable. Also, 59% of Urban Masses repose faith in medical science and believe that all health conditions & ailments will be curable, eventually.

While Government's current healthcare expenditure is around 2% of GDP, it is steadily increasing over the years. With better infrastructure and wider reach, the healthcare system will only help consumers further.

To summarize, India needs large-scale investments in healthcare; professionals need better pay, and hospital better facilities. The government could do more to enhance low-cost healthcare infrastructure.

# 61%

of Urban Masses agree strongly that they need to have a say in the decisions taken in the interest of their health

# While nearly all eligible citizens took the Covid-19 vaccine & they believe in vaccines, majority want control over their health decisions



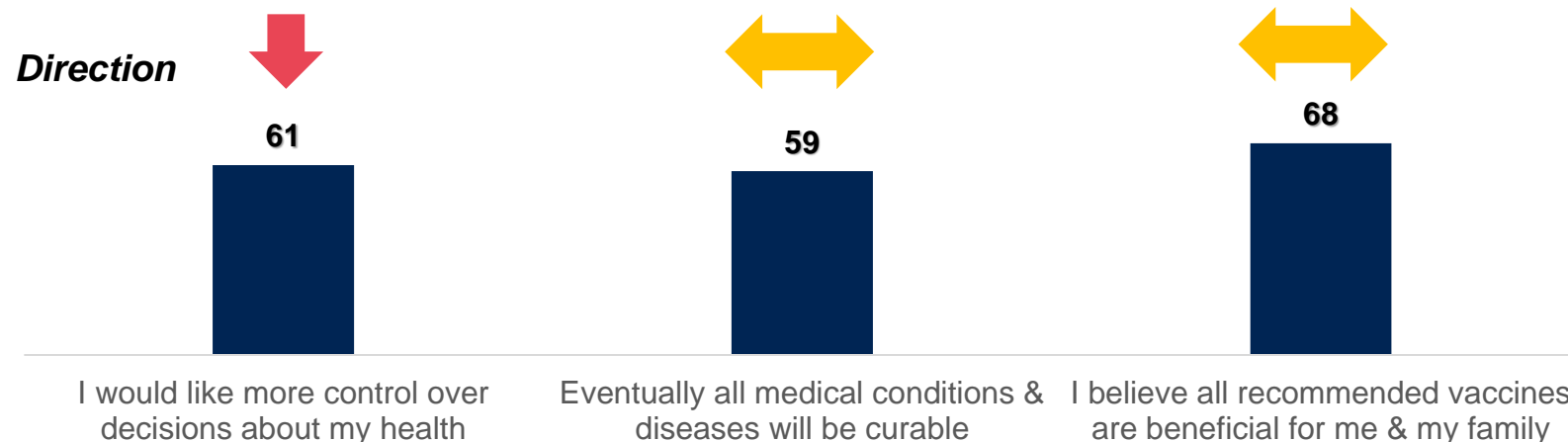
*To what extent do you agree or disagree with the following statements?  
% strongly agree*

**I would like more control over decisions about my health**

**Eventually all medical conditions and diseases will be curable**

**I believe all recommended vaccines are beneficial for me & my family**

Base:  
2000 Urban Masses



## Key Insights:

- South Indians want greater control over decisions about health while other zones want to significantly give up on control. However its interesting that all zones hover around 60% score.
- Tier3 town dwellers are reversing their belief that all medical conditions will be eventually curable. Score is down, 48% Vs 79% in 2021. This could be due to the diseases which did not get attention during pandemic are now in focus for treatments. These had taken a back seat during the pandemic.
- Tier3 Urban Masses are reversing their belief that recommended vaccines are beneficial. Score is down, 65% Vs 81% in 2021. This may due to the decreased chatter about immunization in media.

# Digital Indians are undecided & not as vocal. Greater exposure to opposing viewpoints, a wait-&-watch approach puts them in a fix



To what extent do you agree or disagree with the following statements?  
% strongly agree

**I would like more control over decisions about my health**

**Eventually all medical conditions and diseases will be curable**

**I believe all recommended vaccines are beneficial for me & my family**

Base:

1000 Digital Indians

**Direction**



**46**



I would like more control over decisions about my health



**42**



Eventually all medical conditions & diseases will be curable



**45**



I believe all recommended vaccines are beneficial for me & my family

Key Insights:

- More confidence about healthcare advancement to cure all diseases in Metros

## Signals

# The government did well during the pandemic overall, and other brands also responded to this wider health-consciousness

*Pradhan Mantri Bhartiya Janaushadhi Pariyojana*, leading to savings of approximately ₹5,000 crores for the citizens in 2021-22.



**Add high-fibre foods**  
to your diet to keep your blood sugar levels in check.

**Walking for 15 mins**  
post your meal can help lower your blood sugar levels.







# Acknowledgements

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