Uncovering the Modern Indian Consumer

A roadmap to uncovering the shifting consumer preferences and behaviours shaping today’s Indian consumer landscape.
India is one of the world’s fastest-growing economies, presenting a range of challenges and opportunities for manufacturers, companies, and brands in the Indian marketplace.

The rapid economic development and urbanisation of the country have resulted in a shift in consumer lifestyle and a significant increase in the speed of modern, everyday life. Indian consumers today are increasing their efforts towards self-betterment and self-care, on a journey to becoming the best versions of themselves.

In the pages that follow, Mintel’s team of expert analysts offer a roadmap to uncovering today’s Indian consumer—who they are, their shifting behaviours, as well as the trends impacting their lifestyles. Learn about the market opportunities resulting from this consumer journey of self-enhancement and find out how brands can translate these findings into informed business decisions for a successful future.

The unique perspectives and analysis of India’s key consumer markets are the result of examinations of the trending shifts in consumer behaviour and product innovation on the local and global scale. Discover the insights provided by Mintel’s team of local analysts and thought leaders, representing expertise in consumer lifestyles, food and drink, as well as beauty and personal care.

These analyst-led opportunities are supported by Mintel Indian Consumer, Mintel’s latest consumer intelligence platform covering the Indian marketplace, local and international product launches collected on Mintel Global New Products Database (GNPD), and emerging developments observed by Mintel Trends’ worldwide network of analysts.

On behalf of Mintel, we welcome the opportunity to discuss how these insights can help to grow your business. Please get in touch and happy reading!

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Editor’s Note

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Mintel Indian Consumer

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Content

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Pursuing a State of Overall Wellbeing
A third of Indians say they try to live a natural lifestyle.

More urban Indian consumers are interested in living a natural lifestyle, attributed to the array of initiatives carried out by major players in the Indian market who are putting their hands together to raise awareness around naturalness.

In fact, government and public programmes alike are helping to raise awareness about living a natural life. Reasons behind living natural lifestyles include health improvement, prevention of health problems, as well as overall wellbeing.

Today, the availability of mass brands with natural ingredients at affordable prices is also helping to drive the sale of natural products. Mintel expects the demand for natural products to continue to grow as the trend toward healthy living also increases.

Companies and brands should identify who these natural consumers are, what share of the population they represent and understand what ‘natural’ means to them in order to create the products these consumers want.

For three in five Indians, their top goal for the next three years is to live a healthier lifestyle.

A desire for better health and wellbeing underpins many of the consumer lifestyle trends we see today. Interest in health shows no signs of abating and will continue to be a driver for natural products.

The number one goal of a sizeable group of urban Indians is to live a healthier lifestyle; in fact, over a third associate ‘healthy’ with ‘natural’ on a product label.

It is important for companies, brands and manufacturers to strengthen the association between better health and the term natural. Highlighting natural ingredients and their positive impact on health and wellness will be crucial.
Nearly two in five Indian men agree that appearance is very important.

The Indian male grooming industry is expected to grow significantly in the coming years, particularly as more and more men put effort in keeping up their appearances and are increasingly conscious of the need or desire to look groomed.

Evolution in the personal hygiene and male grooming markets has led to the accelerated growth of the Indian male beauty and personal care industry. Men’s grooming has evolved from basic shaving creams and shampoos, to a variety of products for haircare, skincare, beard care, fragrance, accessories and beyond. Skin lightening and hair colour products for both the hair on the head and on the face are among the most popular among Indian men today.

Where it makes sense, beauty and personal care brands should consider offering skincare and overall grooming products for men. A focus on innovative grooming and personal care products created specifically for men in order to ride the trend of male grooming could prove successful based on current and forecast trends in the market.
Almost half of Indian female skincare users aged 25-34 look for a natural claim when purchasing a skincare product.

Claims such as ‘all-natural product’, ‘organic’ and ‘herbal’ will be the key elements of beauty and personal care products going forward. Today, brands across the spectrum—mass to premium—are attempting the natural trend.

In fact, the Indian skincare market is ruled by natural claims, with consumer demand met by new product launches. According to Mintel Global New Products Database (GNPD), 70% of facial skincare launches in India in 2018 featured a ‘botanical/herbal’ claim on packaging, while 22% featured a ‘natural’ claim.

The preference for all things natural among city dwellers opens up the opportunity for beauty and personal care companies to use food-grade ingredients—referring to any ingredient that is safe for human consumption—in beauty products. For example, a lipstick that contains only food-grade ingredients could, in theory, be safely eaten without harming one’s health.

To get instant access to over 30,000 product innovations a month, ask us about Mintel’s Global New Product Database (GNPD).
Stressed Out and Tired
Almost half of Indian consumers say stress is a health concern.

Stress is a common feeling among today's urban Indians. With fast-paced lifestyles and gruelling schedules, many are struggling to manage personal and professional responsibilities.

Indian Millennials tend to work long hours and have long commute times, which eats into their leisure time. The sedentary, yet on-the-move nature of urban living has consumers actively seeking out convenient outlets to relieve stress.

According to Mintel GNPD, just 0.1% of all new product launches in India carried a ‘stress & sleep’ claim in 2017, all of which were in the vitamins and supplements space. This signals a huge gap in the consumer market for more stress relief product innovation.

A third of Indians say tiredness or fatigue is a health issue they are concerned about.

Fast-paced lifestyles, coupled with the myriad of personal and professional responsibilities consumers juggle each day, can leave urban Indians feeling constantly drained. As technological advances make it harder to clock out, tiredness or fatigue has made it to the top of the list of health concerns for many urban consumers.

It isn't just busy lifestyles that can contribute to fatigue, but other factors such as stress, nutritional deficiencies and a lack of exercise. This highlights the need for solutions that can improve consumers’ energy levels.

Brands have an opportunity to provide consumers with solutions that fit their lifestyles. For example, they can look at offering food and drink products with naturally energising ingredients to beat fatigue while highlighting specific benefits. Natural ingredients such as caffeine, guarana, and ashwagandha can help consumers associate a product with energising functionalities.
Over a third of Indian snackers say they snack to relieve stress.

Mintel Trend ‘Mood to Order’ discusses how consumers are looking to manage their emotional wellbeing; and treating themself to indulgent foods is one way consumers are managing their mood.

Busy and stressful lifestyles means less time to prepare meals, leaving urban consumers in a position to reach for a quick snack, which may not necessarily be healthy. The correlation between what we eat and our emotional state is well documented—especially when it comes to ‘stress eating’. However, snacking to relieve stress can lead to feelings of guilt.

Brands could eliminate the potential for food-related guilt by offering snacks with functional benefits and/or mood-elevating ingredients. They can explore messaging utilising ‘energising’, ‘calming’, ‘relaxing’ or ‘attentive’, with clear, ingredient-based claims and tangible benefits.
Half of Indian snackers wish there were more healthy snack options.

With overall health consciousness and snacking occasions both on the rise, urban Indians are demanding more healthy snack options. Consumers are already looking at alternatives such as nuts, oats, fruits and energy bars, which, in India, are not traditionally seen as snacks.

As the need for healthy snacks grows, the challenge from players in the snack industry will be to create the right balance between taste and health. To address this paradox in snacking, the opportunity for brands lies in marrying indulgence with nutrition to help improve the health perception of products.

Companies can address the dual consumer needs for indulgence and health in snack foods through the use of better-for-you ingredients; for example, nuts, seeds and traditional grains in an indulgent snack format such as chips.

If you'd like to hold an innovation session where you'll be updated on the latest trends, as well as having instant online access to over 80 consumer trends and 8,000 observations on how brands are targeting their consumers, ask us about Mintel Trends.

- Reach new markets and demographics
- Validate your ideas or find the inspiration for new ones
- Get a deeper understanding of what drives your customers
The Need for More Time
Over half of Indians say that they would like to better manage their time over the next three years.

Consumer lifestyles are changing rapidly, with urban Indians increasingly wanting to do more in life for fear of missing out. Consequently, they are spending more time out of the home. Busy schedules push them to optimise their time, multitask, as well as be healthy and fit, in order to enjoy life to the fullest.

Snacks have traditionally been a companion to television viewing; given that mobile devices are the ‘new TV’, and time with smartphones is increasing, this gives brands opportunities to develop on-the-go snacks.

Modern commute times are ever increasing. As reports show that people living in the metro cities of Kolkata, Mumbai and Delhi have an average commute time of around 60 minutes one-way, Mintel Trend ‘Transumers’ notes how consumers are looking for ways to maximise their time while in transit, resulting in growing demand for products that fit their lifestyle needs.

Health, portability, and convenience can catapult snacking on an upward growth trajectory; on-the-go and single-serve packs, spill-proof caps, and vending machines at bus shelters and train stations can further drive the growth of India’s snacking sector.

Two in five Indian consumers cook at home to save time.

Cooking meals from scratch at home is the norm in India and there is a significant premium placed on fresh, home-cooked food. However, hectic schedules and the breakneck speed of life today has made it necessary for consumers to look for shortcuts in certain everyday tasks in order to save time. This is where ready-to-eat (RTE) and ready-to-cook (RTC) products come into the picture.

RTE and RTC products have the opportunity to appeal to time-pressed Indians who are looking for alternative, easy, and tasty meal options—where convenience and time saving are cornerstones. Because ready meals do not have a strong link to healthfulness, brands should highlight the advantages of ready meals such as ‘quick preparation time’ and ‘always available’ to encourage consumers to include them as essentials in their grocery basket.
Uncovering the Modern Indian Consumer

A roadmap to uncovering the shifting consumer preferences and behaviours shaping today’s Indian consumer landscape.

Pursuing a State of Overall Wellbeing

A THIRD of Indians try to live a natural lifestyle.

Identifying who these natural consumers are, what share of the population they represent, and understanding what natural actually means to them, will determine which brands succeed and those that fail in the market.

THREE IN FIVE Indians want to live a healthier lifestyle in the next three years.

Strengthening the association between better health and the term natural and highlighting natural ingredients and the effect they have on health and wellness is crucial to product development.

The Beauty Standards of He and She

TWO IN FIVE Indian men say appearance is important.

Focusing on innovative grooming products created specifically for men will prove successful based on current and forecast trends in the Indian beauty market.

ONE IN TWO Indian female skincare users look for natural claims when purchasing skincare products.

Claims such as ‘all-natural’, ‘organic’ and ‘herbal’ will be the key elements of beauty and personal care products going forward.
Stressed Out and Tired

A THIRD of Indians are concerned about the effects of feeling tired or fatigued on their health.

Providing consumers with solutions that fit their lifestyles, like offering food and drink products with naturally energising ingredients to beat fatigue, is one way to meet the needs of today’s modern consumers.

HALF of Indians say stress is a health concern.

Companies and brands that help consumers deal with everyday stressors by introducing products aimed at combating stress will find success.

Snacking without Guilt

A THIRD of Indian snackers snack to relieve stress.

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HALF of Indian snackers wish there were more healthy snack options.

There is market white space for companies to address consumers’ needs for indulgence and health in snacks through the use of better-for-you ingredients in indulgent snack formats such as chips.

The Need for More Time

HALF of Indians would like better time management in the next three years.

Health, portability and convenience are key in catapulting snacking on an upward growth trajectory for the Indian snack food industry.

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TWO IN FIVE Indians cook at home to save time.

The Indian marketplace is primed for ready meals that highlight advantages like ‘quick preparation time’ to combat current negative consumer impressions.
Analysts

Minu Srivastava, Consumer Research Analyst, India

Minu’s background in quantitative and qualitative research equips her with deep consumer and category understanding of the Indian market. She has a PGDBM in Marketing, a PGD in Advertising and has worked across the beauty and personal care, household and food industries, with significant experience in skincare and haircare.

Rimpie Panjwani, Senior Beauty Research Analyst, India

Rimpie specialises in analysing and providing insights on India’s consumer beauty and personal care market. She has a Master’s Degree in Management specialising in Marketing, with over seven years of experience working in various roles across consumer research, claim substantiation and marketing in the beauty and personal care industry.

Ranjana Sundaresan, Senior Food & Drink Analyst, India

Ranjana specialises in identifying and analysing global consumer trends with a lense on the Indian market. With a Statistics degree, and experience as a former sub-editor for the Deccan Chronicle and a researcher and copyeditor for RR Donnelley Global Outsourcing, she delivers essential analytical skills.

Natasha Kumar, Food & Drink Analyst, India

Natasha’s background in qualitative research and consumer insight mining in industries such as food and drink, beauty and personal care and automotive equips her to look at data on a granular level without losing the big picture. With a post-graduate degree in Biomedical Engineering from Singapore, her role entails analysing and providing insights on India’s food and drink market.

Mintel’s analysts look at the latest consumer research, market information, company news and product data to help you drive your business forward.
Nidhi Sinha, Head of Content, Mintel Indian Consumer

Nidhi has extensive CPG industry experience having worked in the Indian market and in markets across the globe. A unique understanding of data and consumer behaviour helps her draw insights for companies and brands looking to succeed in the Indian market. She leads Mintel’s research team to better understand the Indian consumer.

Did ‘Uncovering the Modern Indian Consumer’ whet your appetite? Ask a member of the Mintel team for more about our intelligence on the Indian market, and you’ll be able to:

- Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- Understand the Indian market and see how it fits into wider trends on a local and global level.
- Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

Visit mintel.com to find out more
Mintel Indian Consumer

An interactive research tool bursting at the seams with unique data and local expertise, unlocking everything you need to know about today’s Indian consumer.

With over 1.3 billion people, India has a myriad of languages, religions, ethnicities and a proud heritage. But it’s changing. With nearly half of its population under the age of 25 and an evolving social, economic and political landscape – it’s where some of the most exciting innovations are originating from.

We tell you how major trends are affecting India and hone in on the regional differences, from socio-economic groups to demographics such as age, gender and household composition. We’re speaking to consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

We’re analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts are then examining the primary research and consumer data and translating it into what it means for you.

The result? 52 different titles across food, drink, beauty and lifestyle categories.
How *The Indian Consumer* will help your business:

1. Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

2. Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

3. See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

Welcome to the future of consumer intelligence in India

**Examples of the types of consumer insights you will get**

**Natural Consumer**

The opportunity
Communicate natural using consumer-friendly language.

Purity and simplicity are easy-to-understand concepts and help consumers make the ‘close to nature’ association, rather than specific concepts such as ‘raw’ and ‘minimal’.

In terms of ingredients, steer clear of scientific names and use more common, familiar terms to build trust.

**Carbonated Soft Drinks**

85% vs 46% consumption of CSDs among urban Indian consumers in the North vs the South

49% of urban Indian consumers say that the use of real fruit (also would encourage them to buy more CSDs for themselves or their household)

**Ready meals in India**

Innovate on freshness and time cues
Focus innovation on freshness, health and time savings to increase uptake among homemakers, who are more accepting of convenience foods.

Among homemakers, who shoulder the responsibility for food shopping and preparing meals. Ready meals have the potential to offer consumers time savings so they can focus on tasks they would like to do versus those that they have to.

**Digital Trends**

Target this segment with products for young adults in categories across health, beauty, fashion, and technology. Promote low-priced products to address the value and budget mindset of this group (most students are financially dependent).

82% of urban Indian students own a smartphone

For more information on today’s Indian consumer, please get in touch by visiting mintel.com/indian-consumer.
The world’s leading market intelligence agency
Our expert analysis of the highest quality data and market research will help you grow your business.