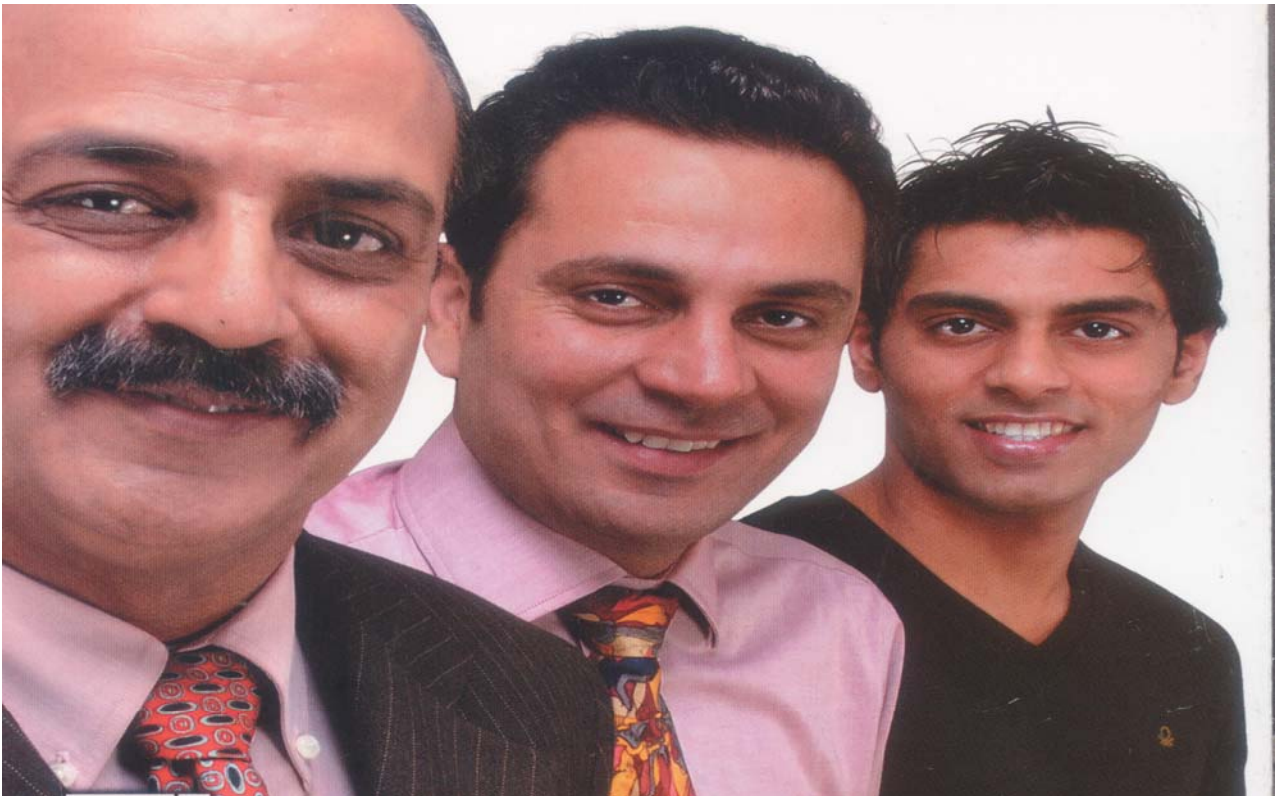


**M-FILE
LIFE AND TIMES OF INDIAN MEN**



**A STUDY IN URBAN INDIA
MaRS Monitoring and Research Systems Private Limited**

M-FILE LIFE AND TIMES OF INDIAN MEN

We carried out a study on the Life, Times and Attitudes of Indian Urban Male in the third quarter of 2007. The study was carried out in association with Business Today, the Business magazine. Findings from M-FILE have been used in the cover story of Business Today, dated 30 December, 2007. You may access the same at-
<http://businesstoday.digitaltoday.in/index.php?latn=1&issueid=16&page=archieive>

The man is composite and complex. Today, he also lives in a composite and complex system where there is a dynamic interlink between him and the familial, societal and global system. Every facet and dimension of the man's life can get influenced by and can influence the layers of family, country and the world around him

For some, it is more so, and for some others, less. The objective of the exercise was to understand the man in his many dimensions, draw the profile distribution of the man by age, regions and towns and find out where he belongs in this dynamic and composite environment.

Profiling men and brands are not tasks that can be taken up at leisure. For brands, there are precedence, protocols and research studies that define profile dimensions as well as methodological issues. However, there are no definitive guidelines to help carry out the task of profiling men. While it may be presumptuous to liken the task of profiling men to the task of writing history, there are similarities. No matter how objective the researcher attempts to be, he will ultimately be limited by his own world view and information content. And finally, no matter what the event or the aptitude reveals, there will be always more than one interpretation.

In course of the research, we picked up a questionnaire in which a man in Mumbai had exhibited strong agreement with both of the following statements:

- 'A woman's place is at home'
- 'Unmarried couples living together are acceptable to me'

We met the man. He turned out to be a perfectly rational and normal human being instead of an extra-terrestrial. His responses were added onto our data and it helped in classifying men according to the levels of conservatism. But back at the office, we found ourselves completely at loss in trying to classify the person we met - should we type him as a conservative, or as someone exactly the opposite?

This event must be borne in mind while reading a quantitative market research report such as this one here. More importantly, it will remind us that outside all attempts to classify and categorize the man, while interesting patterns and conclusions can be drawn in aggregation, the individual will remain as intractable and elusive as ever.

Amen

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LIFE AND TIMES OF INDIAN MEN

Section 1: Profile

India is on the move. A nation on the move does not move by itself. The people - the prime constituent of the land, are the fundamental propellers of the movement, while they themselves are being moved by the flux of the nation. Men form 52% of the Indian population. Being part of a male-dominated society makes them a key segment in the entire process.

What is happening to the men in India today? What are the changes that are evident and where are they headed to? There are conjectures. It is stated quite often that as a society we are becoming more materialistic. On the other hand, speak to a serious historian and the person is likely to say that while spiritualism has remained a major plank in the society, the acquisitiveness of the Indian people have never been in doubt.. Opportunities may have been fewer; accessibility to the available opportunities may have been restricted. But there's no doubt that the Indian men have always been as materialistic as men from other societies.

It is also said that we are a conservative society. A conservative of today may hold values that would have been considered radically modern a hundred years ago. A conservative in one part of India may be declared a modern in another. The hues are many and so are the parameters.

So when we decided to draw profiles of Indian men, our first concern was to fix profile dimensions. After many discussions, background research and piloting, we decided on the following six dimensions that we considered relevant in the times in we live in:

- Man, the materialist
- Conservatism
- Man, the exploring consumer
- Emotional face of the man
- Price consciousness
- Brand consciousness

We have no baseline values that we could use to assess the trend in the society. However the survey findings would help us in understanding the nature and pattern, and provide a set of values that are applicable to and indicative of men in the third quarter of 2007.

1.1 Man, the Materialist

Man, the materialist, has become a common refrain and it was necessary for the study to put in a proper definition and a set of criteria, that were both simple to implement and evocative of the concept. After in depth discussions and literature review, three aspects were chosen. These were: a) Acquisitiveness, b) Primacy of money, c) Predisposition to the ownership of nicer things. The continuum was then defined: the highly materialistic man was he who consistently scored high on each of these three aspects, low otherwise and the moderates in between.

Has materialism taken root in India? The study findings show that more than a third of the men exhibit materialistic attitudes of a high or very high order. While there are about 28% moderates, only 13% exhibit very low levels of materialistic attitudes.

We have no baselines, so we have to view these proportions in absolute terms. That one -third of the men - one in every three from among those who belong to the middle and the higher economic classes are hard core materialists, is perhaps not indicative of a high We have no baselines so we have to view these proportions in absolute terms. That a third of the men, one in every three, from

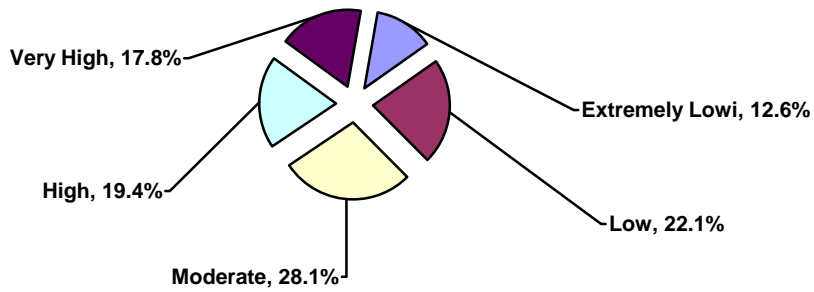


Figure 1: The materialistic profile of Indian men

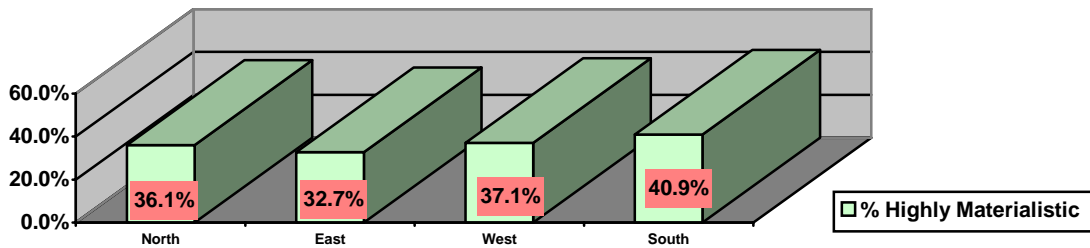


Figure 2: Zonal pattern: Percent highly materialistic

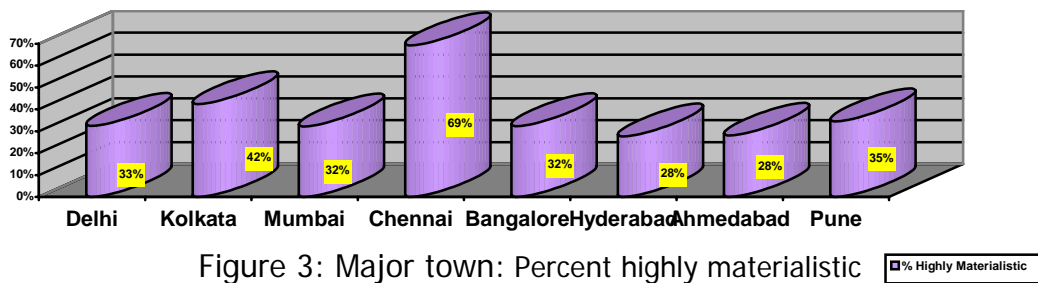


Figure 3: Major town: Percent highly materialistic

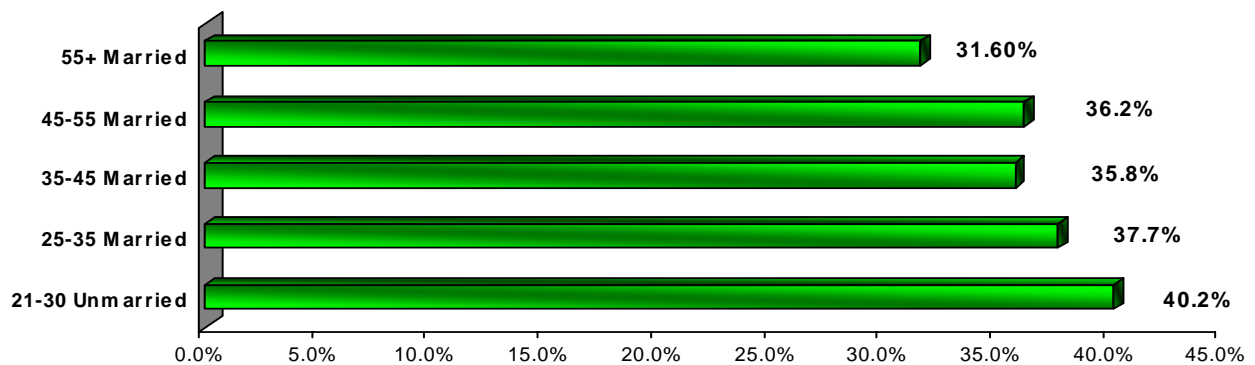


Figure 4: Percent highly materialistic by age

among the men who belong to middle and higher economic classes and are still growing economically, are hard core materialists, perhaps is not indicative of high incidence of materialism in society. More significantly, only 13% of the men exhibit low level of materialistic attitude. This, in the land of Gandhi, is a significant indicator and supports the hypothesis that materialism has begun to take roots and over time we may witness a significant increase.

The pattern is evenly spread, but the South emerges as the zone showing the highest proportion of highly materialistic men (41%), followed by the West (37%), and then followed closely by the North (36%). The least in this respect, perhaps fitting a popular conception, is the Eastern zone (33%).

The three metropolises in the South zone prove a study in contrast. Chennai emerges as the urban centre with the highest level of materialism in India, with 69% men classified as high materialistic. Hyderabad at 27.6%, on the other hand, emerges as the town with the lowest level of materialism in the country, at par with Ahmedabad in the west. Bangalore at 32.3% also remains at a lower level, almost at par with Mumbai. Kolkata at 42.4% registers high incidence of materialistic men - this proportion being significantly higher than the East zone average of 32.7%, thus implying that the other towns in this zone score much lower in this respect. A fairly low proportion of men with materialistic attitude in Ahmedabad exemplifies that the residual effect of Gandhi in his birthplace still exists. Among the most significant findings is the fact that the mini-metros (population 10-15 lakhs) at 40.8% and mid-metros (15-30 lakhs) at 39.9% exhibit fairly high materialistic attitudes. The trend may have stabilized or reached its peak in some of the large metropolitan towns of India. The mid-metros and mini-metros will lead the trend in the next round. The wannabe metros (population 5-10 lakhs) on the other hand exhibit a much lesser materialistic level (33.6%).

As expected, this attitude is most prevalent among the younger age group and generally goes down with age. However, the gradient is not steep - the proportion of highly materialistic men maintains itself at 32% even amongst working men in the age group of 55 years and more.

While this may seem contrary to the general perception that the younger age category is more prone to materialism, the trend actually cuts across age barriers. Attitudes change uniformly, though it may not translate into behavioral changes at the same uniform pace.

Half the men in the North zone would like to be rich enough to buy anything they want, whereas the same proportions are considerably lower in East (33.5%), West (34.6%) and South (27.7%). Upon asking them whether they agreed with the idea that money can buy happiness, the highest affirmative came from the men in South (25.1%), followed by North (20.1%), West (19.3%) and the East (14.3%). It is interesting here to note that there is no gap between the two indicators in South zone, and large gaps characterize the other three zones. Does this reflect levels of consistency or lack of it in the respective zones, or is there a more subtle explanation?

Strongly agree-% respondents	North	East	West	South
I would like to be rich enough to buy anything I want	50.0	33.5	34.6	27.7
It is really true that money can buy happiness	20.1	14.3	19.3	25.1

It could very well be, that almost all those in the South zone who 'like to be rich enough to buy anything they want' believe that 'this will buy them happiness' as well. On the other hand, in the other zones, there is yet another category that feels that being 'rich enough to buy anything they want' may be at the 'expense of happiness'. They are, nonetheless, willing to trade between the two.

1.2 Exploring Indian Consumers

For the Indian consumers today, there are more choices for shopping than perhaps anywhere else in the world. If they want to buy clothes, they may begin at the fashion street if in Mumbai, or Janpath if in Delhi (or in a dozen similar markets elsewhere in the respective cities) and move on to the 'Marks and Spencers' in any of the major malls. If not the presence of that many markets, limited in size as they are, but the same range in brands may be found in almost all other million plus towns. It is the same story for personal care products.

When choices abound, exploration comes easy. So when we wanted to measure the exploratory tendency in consumer behaviour, we had to be very selective in choosing the measures. Finally, we selected two measures. One that reflected window shopping - taking time out not only for shopping but also just to look and feel; and the other that reflected widening of his choice by going beyond brands that he was familiar with.

The study revealed that no matter how narrowly this trait was defined, the exploring Indian has arrived. Over 50% of the men have been classified as high exploring consumers in India and only 4% can be categorized as extremely low in the continuum.

Among the zones, the North claims the most honors in this respect with over 70% of men being rated as high explorers. North is followed at a distance by South (54.8%) whereas West (49.7%) and East (47.3%) follow somewhat closely.

What makes the north zone the numero uno among all the zones in this respect? From the plains of UP to Delhi, Rajasthan, Punjab and Haryana, the north zone covers a lot of territory and most towns in this zone reflect the same attitude. This, perhaps, fits to certain stereotypes that are maintained, for example, men from the north are more outgoing and greater shop alcoholics than others. The huge lead the men in this zone maintain over the other zones does make a clear statement.

True to its zonal characteristics, Delhi has the highest proportion of high explorers (70%) followed by Chennai (62.9%) and Kolkata (62.9%). Compared to them, Mumbai (51.5%), Bangalore (53.3%) and Hyderabad (50.0%) appear almost sedate. Pune registers a very high score (65.5%). Not so surprisingly, the mid-metros, the towns with a population of 15-30 lakhs, exhibit the highest explorer rating (77.1%) amongst all urban areas in the country.

While there are no prizes for guessing the fact that the exploratory tendency in consumer behaviour is highest among the youngest segment (21-30 years, Unmarried), it is to be noted that the attitude is strong across all ages. The level is over 50% even among the age segment of 55 years or more.

The exploring Indian is here to stay. More than half of them say that they like to shop around and look at displays. As high as 40% of them admit to being adventurous in brand selections, agreeing that they enjoy taking chances in buying unfamiliar brands, thereby gladdening the hearts of would-be entrepreneurs.

Strongly agree-% respondents	North	East	West	South
I like to shop around and look at displays	65	51	52	57
I enjoy taking chances in buying unfamiliar brands	47	38	41	44

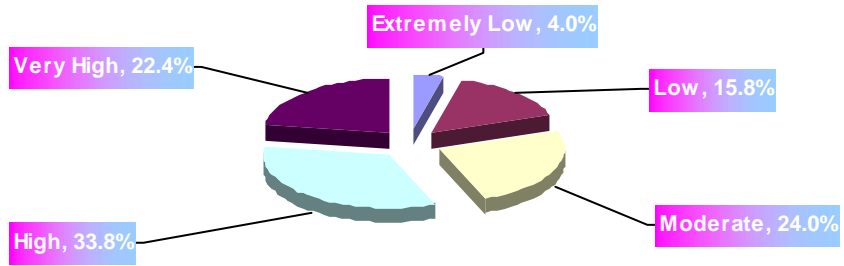


Figure 5: Exploring Indian men – A profile

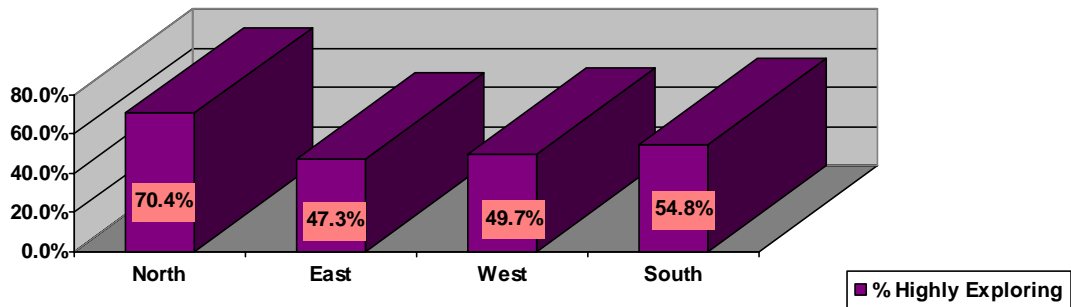


Figure 6: Percent highly exploring men by zones

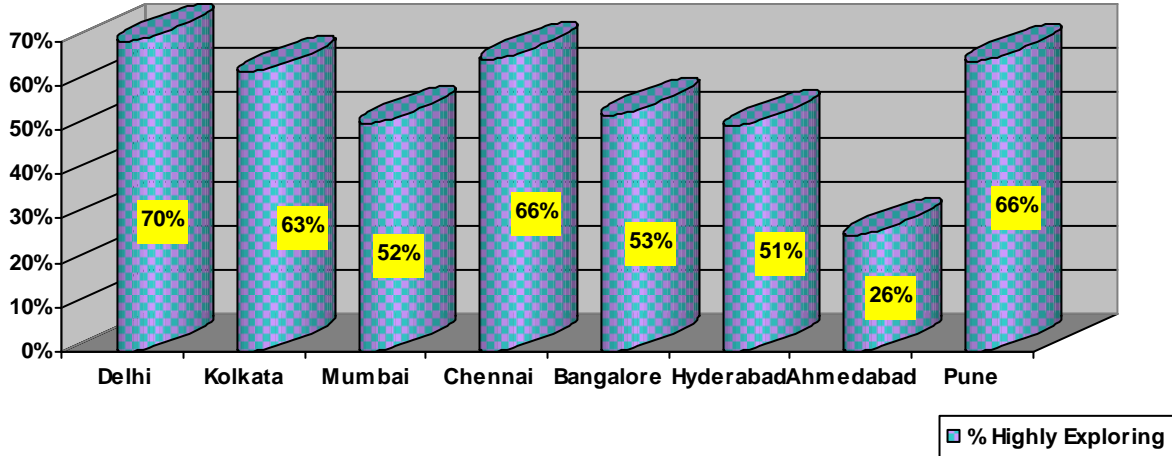


Figure 7: Percent highly exploring by major towns

- Over 50 per cent of men are high exploring consumers in India.
- North Indian men are the most exploring followed by the south.
- Delhi and Chennai top the list.

1.3 The Emotional Face of the Indian Man

Is it possible to transplant concepts and classifications across cultures that are quite different from each other? A simple question, but as it always happens with simple questions, they do not have simple answers. The study attempted to classify the Indian men by transplanting the well known segmentation attempted in the west- the metro sexual men vs. the ubersexual men. The background research showed that this segmentation was applicable to only a very small sub group among the top socio-economic classes. Amongst the rest, there were far too many contrary attitudes and behaviour for the classification to succeed.

Emotionally however, the Indian men remain far more tractable across all classes. And the study defined two characteristics that emerged appropriate in this respect. We termed them the 'metro-emotional' man and the 'uber-emotional' man. The metro- emotional man is softer, often carries his feelings on his sleeves and does not mind if the sleeve is showing. The uber-emotional man, by definition, is the one who is not metro-emotional.

And the study reveals a bipolar universe of 31% uber-emotional men and 30% metro-emotional men ranged around 39% moderates.

The zones clearly reveal their differentials in this respect. East shows the most metro- emotional face and North the most uber-emotional, followed by South and West.

Also, men in their different emotional profiles show distinctly different characteristics.

- Uber-emotional men have significantly higher materialistic attributes than others.
- Also, as the emotional profile of the men moves from the expressive metro profile to the macho uber profile, their exploratory attitudes increase consistently and significantly.
-

Interestingly, there is no significant differential in the emotional profile across age groups, except perhaps a slightly increasing moderation at the older ages. The emotional quotient continues to be an individual trait of a man – something that remains invariant as he grows older.

Age	Metro Emotional	Moderate	Uber Emotional
21-30 Unmarried	28.6%	39.2%	32.2%
25-35 Married	29.5%	38.5%	31.7%
35-45 Married	31.2%	38.4%	30.4%
45-55 Married	30.4%	40.3%	29.3%
55+ Married	25.5%	44.7%	29.8%

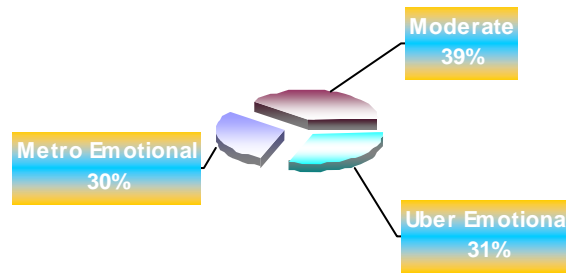


Figure 8: The emotional profile of Indian men

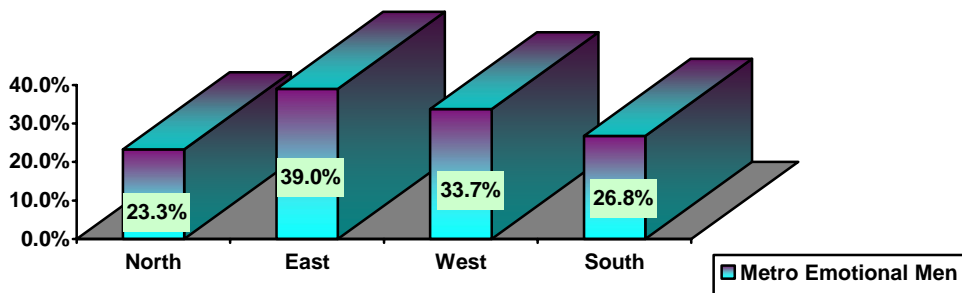


Figure 9: Percent metro emotional men by zones

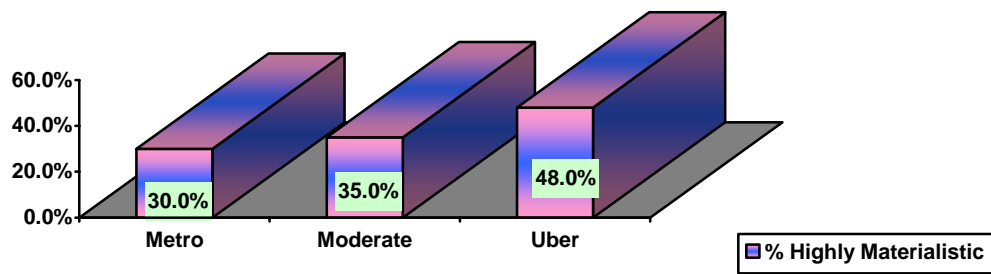


Figure 10: Percent highly materialistic man among the different segments.

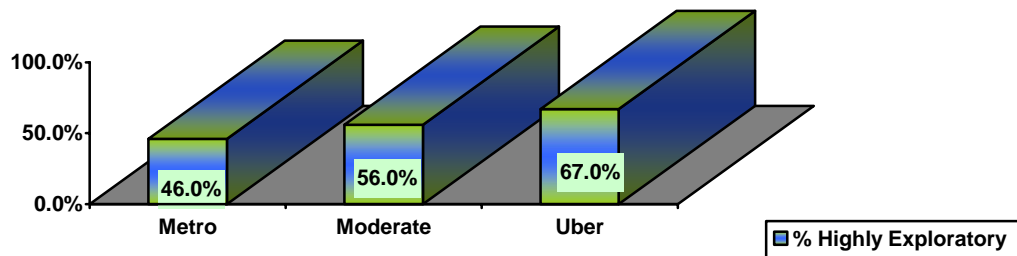


Figure 11: Percent highly exploratory men among the different emotional segments

- The universe is roughly equally divided among the metro-emotional, uber-emotional and the moderates.

1.4 The Conservative Indian

It is normally believed that Indians are conservative people. Conservatism, as opposed to modernity, can be reflected in many dimensions and different parameters are used in corresponding situations and discussions. Of all the profile dimensions considered in the study, defining measures of conservatism provided the biggest challenge. After in-depth discussions with people and sociologists, we decided to adopt measures that were absolutes (and not relative such as comparative measures with the western cultures) and, as always, simple to comprehend and administer. We finally took three measures viz. belief in Indian traditional ways of life (to be interpreted by the respondent), belief in arranged marriages, and the belief that woman's place is at home. A highly conservative person was defined as one with consistently high agreement with each of the three. A highly modern person was one with the opposite views, and the moderates were in the middle.

The jury is out. A large proportion of Indian men may be materialistic, may have become fashion conscious, may have begun exploring the market place for consumption goods, but they largely remain conservatives. The evidence is too strong- too many conservatives (56%), too few moderns (22.8%), ranged around 20% moderates.

While North has the most conservatives in the rank, and south the least, the ratings between the zones only vary from 52% to 60% - clearly showing a more or less uniform density across the country. It is interesting to note that while in case of both 'materialism' and 'conservatism', the four zones are not very distinct from each other, but with respect to emotional profile or the exploring tendency, the zones exhibit significant differentials. Clearly, on certain philosophical attitudes and views of life, the Indians exhibit greater similarity across geographical space, irrespective of their differences with respect to behaviour, or reactions to situations.

This conservatism is reflected in a distinct and clear attitudinal pattern across a range of issues.

- Over half of the men strongly advocate traditional Indian practices, including arranged marriages.
- Majority strongly believe that a woman's place is at home.
- A strong no-no to 'Young girls should be allowed to mix freely with the boys' by over three fourths.
- 'Unmarried couple living together' is certainly not acceptable to 90%.
- For over half of them, homosexuality is socially unacceptable.

	% Strongly agree
I believe in Indian traditional way of life	56.5
Arranged marriages are the best	56.4
Woman's place is at home	50.2
Young girls should be allowed to mix free with the boys	22.3
Homosexuality should be discouraged by society	54.5
Unmarried couples living together is acceptable to me	9.8

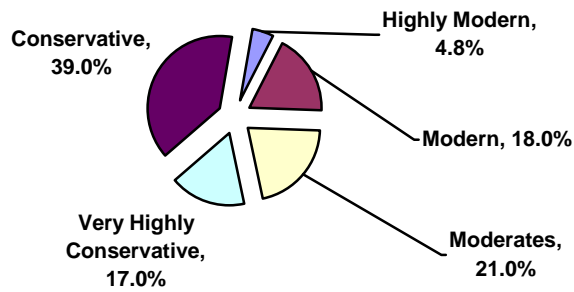


Figure 12: Conservative profile of Indian men

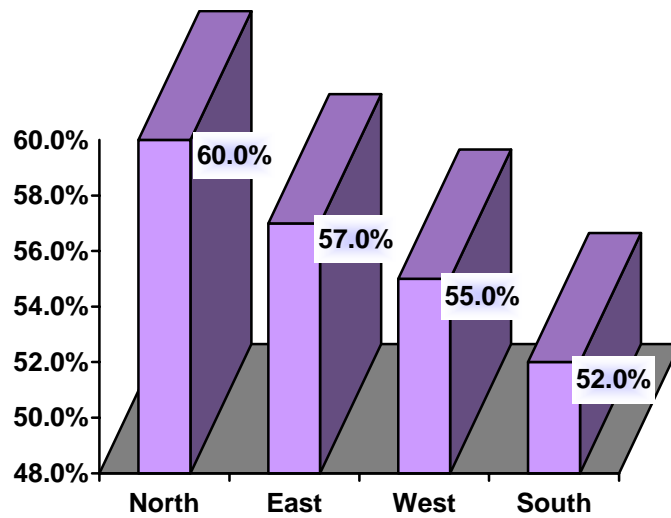


Figure 13: Percent highly or very highly Conservatives by zones

- There are significantly more conservatives in India than modern.
- In fact, less than a quarter of men in India can be classified as modern.
- This is true across all zones; it is highest in the north, followed by east, west and south respectively.

1.5 Price Consciousness

As remarked earlier, the Indian shopping male today is faced with a medley of brands - of all kinds and prices. Some of the most expensive brands in the world have opened their stores across the country. But by and large, the study reveals that there are few amongst the target group for the study who are not price-conscious. About 50% of the men exhibit high price-consciousness and another 30% remain moderately price-conscious. Only about 5% of the men show very low price-consciousness.

Among the zones, North exhibits a price-consciousness level that is much higher than all the other zones. East follows at a distance and the South zone brings up the rear, exhibiting the lowest level of price -consciousness.

Among the towns, men in Delhi express price-consciousness the most (63%), followed by Pune (57%) and Kolkata (54%). Mini and mid-metros have high price-consciousness. Chennai and Ahmedabad are the two towns expressing least price-consciousness.

Price-consciousness appears to be an individual trait that does not change in a man as he grows older. As the findings suggest, the proportion of price-conscious men does slightly go down with an increase in age, but the differentials between the ages are not significant.

Price consciousness is manifest in both looking for value for money, as well as explicitly being price-conscious in the purchase behaviour - more so as a direct behavioral determinant, than a conscious application in looking for value for money. In both cases, the north zone men exhibit more agreement than men from the other zones.

	% strongly agree			
Strongly agree-% respondents	North	East	West	South
I always look for value for money	57.8	36.2	37.9	32.0
I am price conscious in my purchase behaviour	74.6	55.8	50.4	49.0

The differentials in responses to the two statements are quite significant and striking. There are as many as 20 per cent of men who claim to be strongly price-conscious, but at the same time, do not show the same intensity of agreement on 'looking for value for money'.

These 20% constitute an interesting segment – on one hand, they are ready to indulge, not looking for value for money, at the same time keeping a sharp eye on the price tag. They can prove to be an appealing target group of consumers for a suitably positioned brand or product concept.

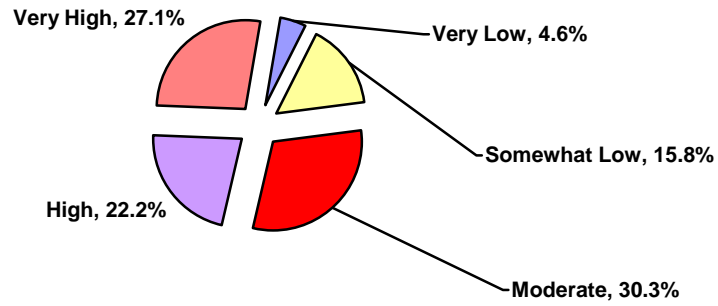


Figure 14: Profile of Indian men – Price conscious

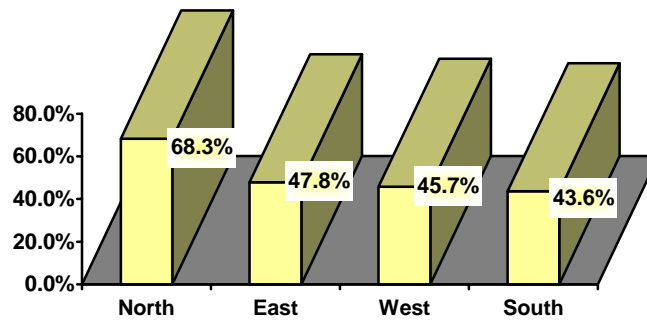


Figure 15: Per cent highly price conscious – by zones

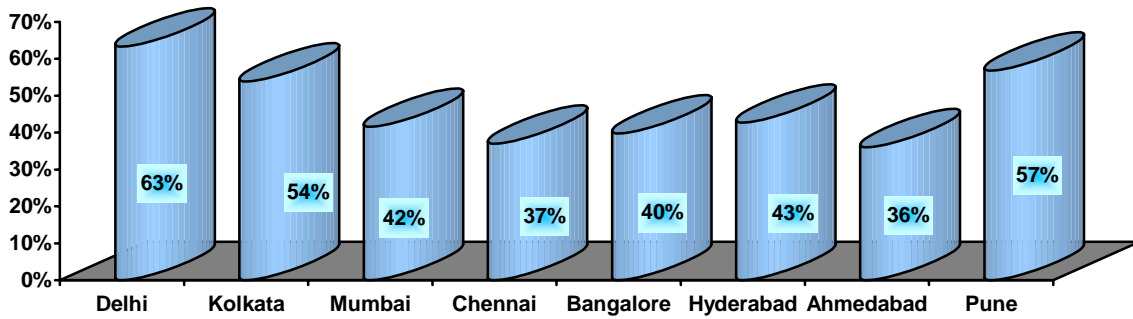


Figure 16: Percent highly price conscious – by town

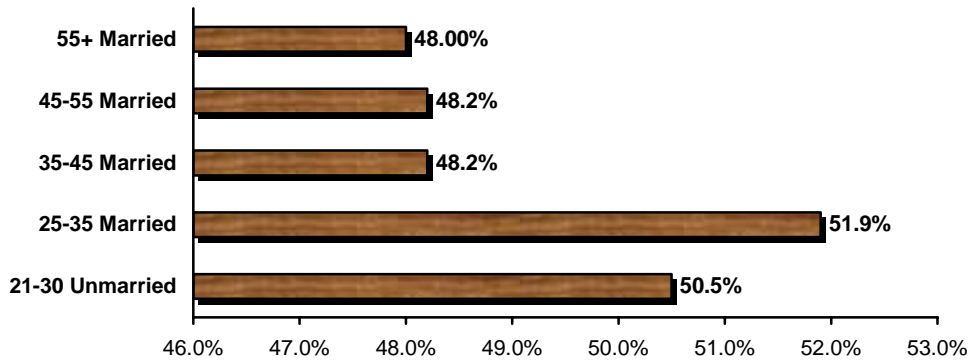


Figure 17: Percent highly price conscious – by age

1.6 Brand-Consciousness

Brand-consciousness amongst the men was measured by using two direct measures. It was found during background research that for most, the brand represented a status value; when a man bought a well-known brand, he liked to exhibit the same, or talk about it. The brand could be exhibited more openly in the case of apparels, and thus the same constituted one measure. On the other side, the brand-conscious person equated his brand and, ipso facto, a premium brand with quality. This constituted the second measure.

Using these measures, the study gives evidence that the brands are defining behavior in the life of a large number of men. Over 40% of men can be classified as having high brand-consciousness.

The zones are somewhat polarized. The North with 52% men who are highly brand-conscious and South with 47% from one cluster, whereas the West (33%) and East (30%) from the other.

- Chennai rules the roost as the urban centre with highest brand consciousness (71.4%).
- Mid- Metros are the next, followed by Delhi.

Brand-consciousness has clearly permeated across all age categories, though perhaps expectedly, it is highest amongst the youngest segment (44% highly brand conscious), and least amongst the 55 yrs+ (35%).

Strongly agree-% respondents	North	East	West	South
I am brand conscious in buying apparels.	58.1	31.6	29.9	42.1
I believe expensive brands give high quality products.	45.7	31.2	38.7	47.5

Analyzing response patterns of the two statements for the north and south, the two highly brand-conscious zones exhibits an interesting differential.

A high proportion of men in the north appear to be very brand-conscious in buying apparels, but not all of them believe that expensive brands are necessarily of high quality. This raises a hypothesis that many indulge in brands for brands sake, or perhaps as 'a means to show-off the brands they consume'.

On the other hand, the men in South are somewhat more consistent and the high brand-conscious men believe that more expensive brands imply high-quality products. Similar pattern can be observed in the west. East, the least brand-conscious of all the zones, is entirely consistent in their views- those who are brand-conscious also appear to believe that expensive brands give high quality products.

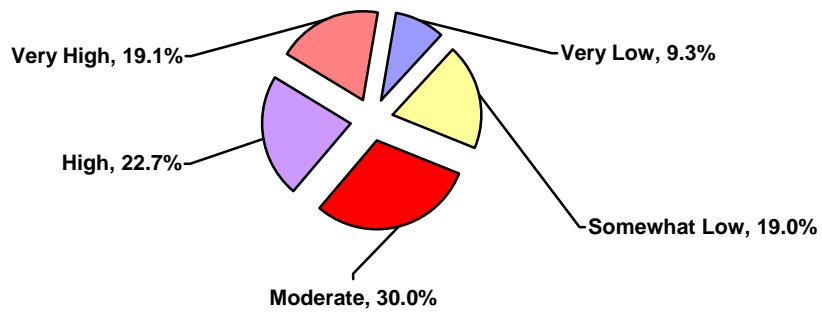


Figure 18: Profile of Indian men: Brand conscious

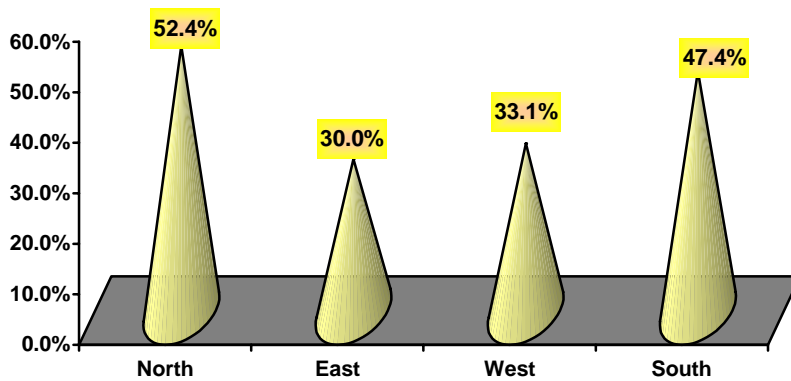


Figure 19: Per cent of high brand conscious men – by zone

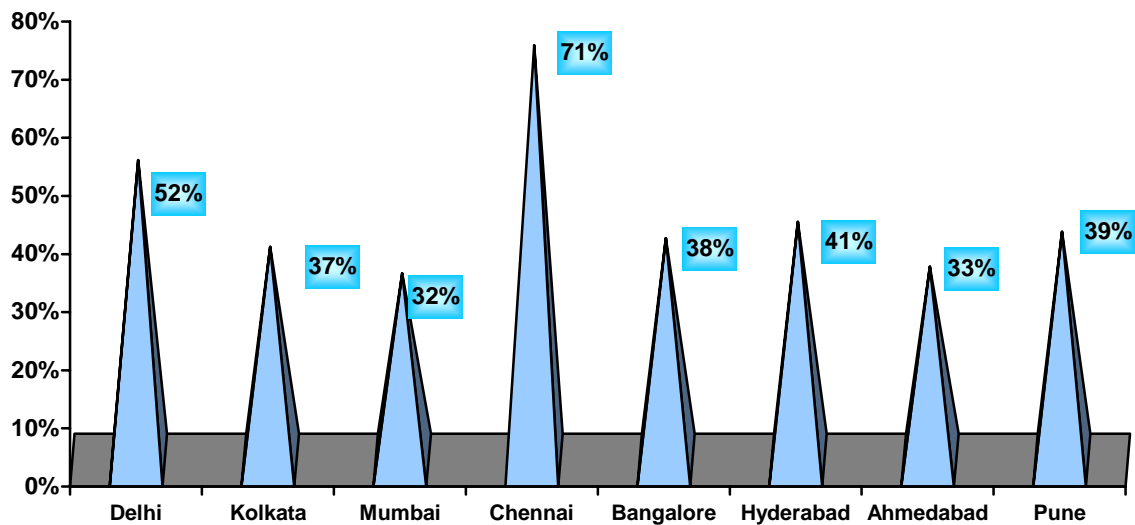


Figure 20: Percent highly brand conscious men – by towns

- Brands have come to occupy mind space – only 28 per cent of men exhibit low brand-consciousness.
- There is a great deal of variation between zones - north and south exhibiting significantly higher brand-consciousness levels than the east and south.
- In south, Chennai shows a much higher brand-consciousness than Bangalore and Hyderabad.

Section 2: Life, Career and Everything

2.1 The man and his workplace

Men work. That is how traditionally men have been defined. Men and their workplaces therefore are integrated in a lifecycle that defines their present, future and their dreams.

Not surprisingly, it is what they earn, or will earn from their jobs that remain more important to them than the work environment, or job profile, or challenges offered in the job or the brand name.

The respondents were asked to choose the two most important aspects that they use to judge their workplace. The options given to them included the money that they earn, the work environment, the job profile, the challenges, and the brand name and future prospects.

63% of them chose money and another 45% chose future prospects. This tells a tale. For men working in high-profile jobs and drawing high salaries, aspects such as brand names and workplace characteristics are spoken about with a great deal of reverence. To the vast majority, these aspects do not even come within the top two factors that are considered in evaluating their job. In fact, the brand name is relevant to only 11%, the challenges offered to 20%, the job profile to 21% and work environment to a respectable 39%.

Move over Descartes, the modern Indian man has arrived. He earns, therefore he is.

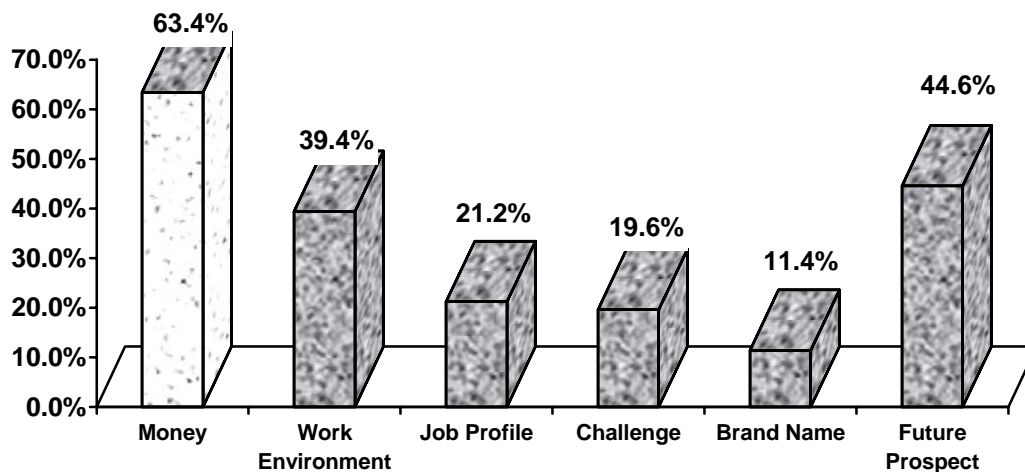


Figure 21: Percent selecting the aspect as among the two most important to judge workplace

2.2 Defining success

Many indicators are considered when a man's success in life is judged by others. We asked the man what he thought were the two most indicative signs of a man's success from a set of seven given options: a great career, lots of money, a good marriage, successful children, happiness with themselves, solid group of friends and having led an honorable life.

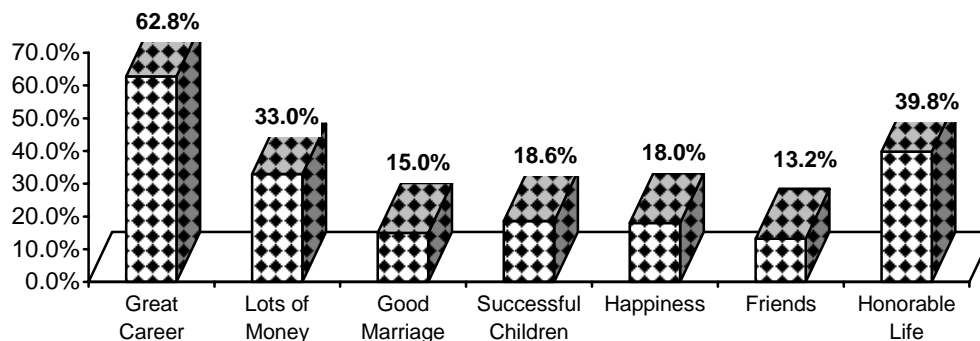


Figure 22: Percent selecting the indicator among the two most indicative signs of main success

Great career emerged at the top, perhaps not at all surprisingly, outpacing all others by a long margin. A pleasant surprise was the finding that 'having led an honorable life' emerged as number two, pushing 'lots of money' to the third spot.

Sadly, the man appears trapped within himself. His trust with marriage or with his friends is not important, definitely nowhere as important as having a great career or earning a lot of money.

Relative ratings of the success indicators vary significantly across zones. In the east zone, great career (72%) and lots of money (42%) rate higher than the same in all other zones. For the North zone, leading an honorable life (46.4%) comes next and is quite close to a great career (58.4%). The high ratings of leading an honorable life as a success indicator of man in the north zone is quite intriguing, and may require further in-depth analysis to understand. For the men in South, having a group of friends (30.6%) emerges as a very important indicator, the rating on this aspect being considerably higher than all the other zones, and this may as well warrant an in-depth analysis. Overall, South Indian men provide a more balanced view, the ratings being spread across larger number of indicators- with great career (59.4%) honorable life (37.8%) and lots of money (29.2%). West zone with 64.6% stating great career, 32.4% lots of money and 41.6% rooting for honorable life appears almost a replica of all India ratings.

Perhaps the most telling indicator of the man in India today is the status that he attaches to a good marriage. 14% in North, 16% in East, 12% in West and 18% in South consider good marriage as one of the two success indicators in life. These are not high figures, by any reckoning.

This cannot be an isolated phenomenon and definitely reflects the way married life is viewed in society. While it is an established fact that marriage and family life are considered important in India, the study findings indicate that in almost all cases, after marriage, a married life is taken for granted.

Less than one in five men, uniformly across the country, consider a good marriage worth striving for in their life, or as an objective to attain.

Zones	Great Career	Lots of Money	Good Marriage	Successful Children	Happiness with themselves	Group of Friends	Honorable life
East	72.2%	42.0%	15.6%	16.0%	20.4%	5.6%	29.2%
North	58.4%	32.8%	13.8%	21.2%	21.0%	6.6%	46.4%
South	59.4%	29.2%	18.4%	14.6%	10.4%	30.6%	37.8%
West	64.6%	32.4%	12.8%	21.2%	21.2%	6.8%	41.6%
Total	62.8%	33.0%	15.0%	18.6%	18.0%	13.2%	39.8%

2.3 Man and his worries

What worries the man? He was asked to pick three items out of 12 that worry him the most. The findings reveal a lot. 'Security of job' tops the list, among as high as 34% married men and 54% unmarried men. For the married men, 'health and well being of children' remains next in importance, whereas 'getting the right life-partner' remains number two for the unmarried men. 'Achieving goals' emerges as the aspect that worries them the most, followed by the 'happiness of family'. Worry on illness remains somewhat high, more so amongst married men than the unmarried.

A finding that may appear surprising is that the Indian man did not seem to be concerned about his physical appearance. Aspects such as 'loss of hair' or 'aging' were pushed back in their considered set. This explains the fact that the attempt to segment Indian men as metro-sexual and uber-sexual did not meet with much success.

Item	% Worried about	
	Married Men	Unmarried
Security of Job	63.6	54.4
Happiness of Family	38.1	27.6
Long term Financial Stability	19.8	19.5
Illness	30.6	18.8
Loss of Hair	6.1	5.7
Impotence	5.2	6.2
Health & Well being of Children	49.9	-
Achieving your goals	45.1	43.9
Paying the bills	7.8	5.0
Physical appearance	9.4	8.9
Aging	13.4	5.5
Getting the right life partner	-	44.2

Then there is the added worry. The man was asked if he felt he was not being rewarded according to his ability. The response pattern reveals a great deal of insecurity amongst a large number of men. 40% of them strongly agreed with the view. Is hard work no guarantee for success for most people in India? A resounding 74% of the men agree strongly that it is not. That is a telling commentary.

Do their opinions fully reflect their personal insecurity? Or is there a contribution from the perennial gripe that many Indian men are known to suffer from? This study does not shed light on that, but whatever the cause may be, the attitude is overall strongest in the north zone and least in the south zone.

Strongly agree-% respondents	North	East	West	South
I feel I am not getting reward according to my ability.	48	35	33	20
Hard work is no guarantee for success for most people in India.	80	67	77	70

Overall, only a little more than half (53.5%) of the men claim that they are happy with their standard of living. The four zones exhibit quite remarkable differential on this point. The satisfaction level is least amongst men in the east (33.0%), followed by South (42.6%). In contrast, a significant majority of men in the west (63.8%) and north (65.2%) express their satisfaction with their current standard of living.

Where does the satisfaction come from? From within, or is it related to the external world? There is some evidence to suggest that the man's feeling of satisfaction on the current status is perhaps an internal attribute of a man and may not be driven by external factors. That may be the only way to explain that there is no significant difference between proportions of satisfied men across different age groups.

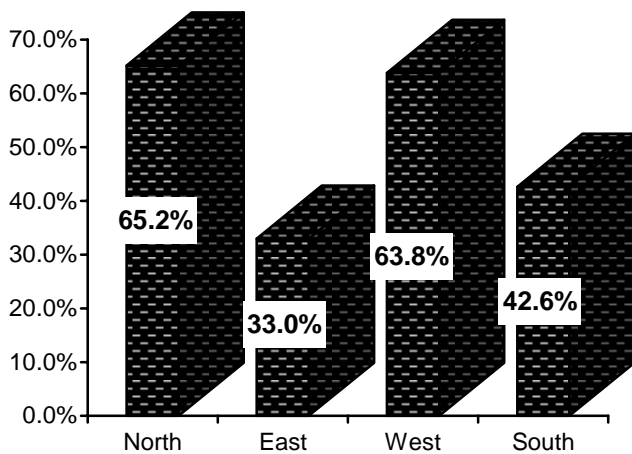


Figure 23: Percent satisfied with current standard of living – by zone

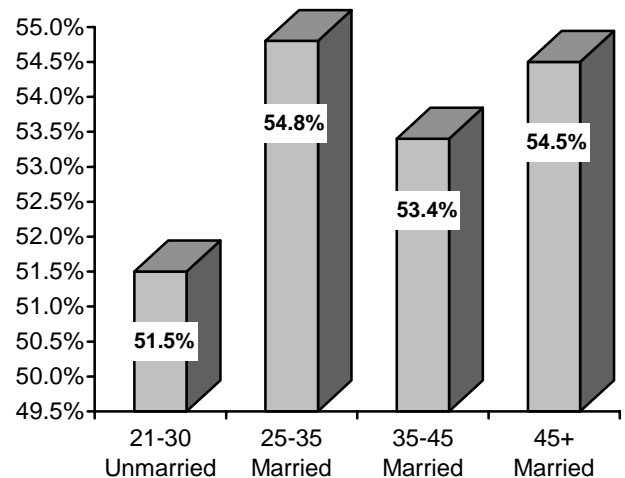


Figure 24: Percent satisfied with current standard of living – by marital status

2.4 The Restless Indian

A large number of men are exhibiting restlessness. About a quarter of them agreed strongly that they would like to settle down in some other parts of India and another 29% agreed somewhat. That left only about 47% of men who feel fully settled where they were, and would not like to move away.

This restlessness is the most in the North zone, followed by the East zone and the West zone. Men in the South show the least migratory attitude. Amongst the towns, Delhi men show this tendency the most, far ahead of other major metros. Chennai, Kolkata and Bangalore follow in that order.

Of the top 8 towns, men in Pune appear firmly rooted in their city; only about 11% showing a strong desire leave the town.

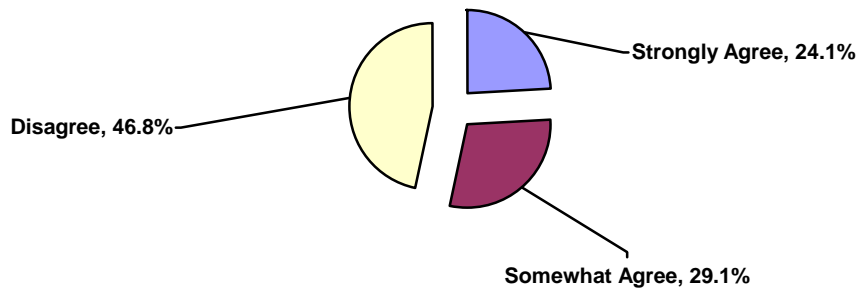


Figure 25: Restiveness at their present habitat

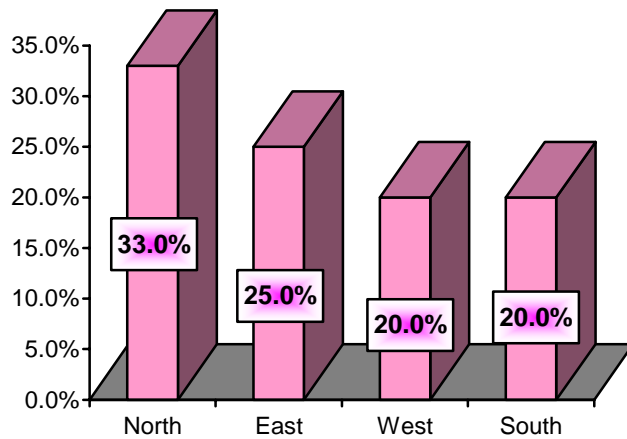


Figure 26: Restiveness at their present habitat – by zone

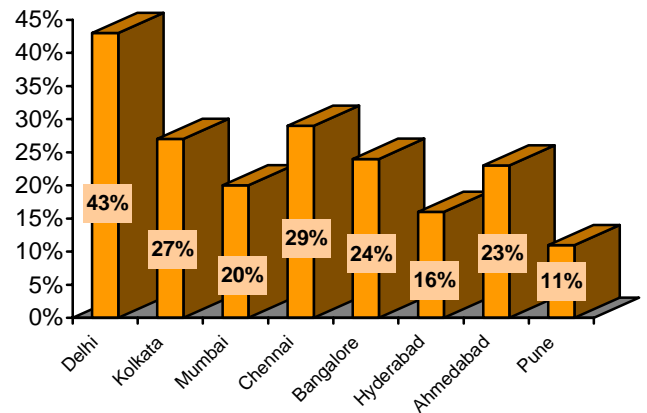


Figure 27: Restiveness at their present habitat – by town

2.5 The Opinionated Indian

They have opinions, and strong ones.

Their views on business and the government are clear and unequivocal and most opinions do not flatter the business corporations. They wish for higher control of government over business practices. 61% strongly believe that the business corporations make too much profit. In the south, this is held by lesser proportion, 54%, than in other zones. The highest proportions come from north and west, about 64%, with east somewhere in the middle at 60%. Majority do not believe that the private companies care about the well-being of the society. Over all a large number of men give a clear vote of no-confidence to the private sector.

There is no surprise, therefore, that virtually the same pattern is revealed in the response to 'Government regulation of business is necessary to protect the public'.

Although about 57% strongly believe that 'censorship of films and televisions is necessary for India', there is a significant divergence of opinions across the zones in this respect. North and West hold views at similar levels - around 60%, followed by South at 55%. The most liberal on this are the men in East, only 44% holding it strongly.

In contrast, the men in the east are much less liberal on the issue. 'It is alright that there are children in ads these days', only 30% holding agreement on this, in contrast to 55%, the most, in the north zone, and 48% in the south zone. That only 37% in the west hold this view may appear surprising, indicating much lower levels of liberal attitudes in the zone than may have been anticipated.

% strongly believe

	North	East	West	South
Business corporations make too much profit	65	60	65	54
Government regulation of business is necessary to protect the public	64	56	65	55
Censorship of films and television is necessary for India	61	44	62	55
It is alright that there are children in ads these days	55	30	37	48
Hard work is no guarantee for success for most people in India	45	37	39	37
Most private companies do not care about good of the society	56	57	53	46
Government should do more to help the poor	80	67	77	70

About 40 per cent of the men, an alarmingly large proportion, strongly believe that 'Hard work is no guarantee for success for most people in India'. It does not speak highly of a system where two-fifth of the residents do not believe in the level-playing field. This cynicism is the most evident in the North zone.

Interestingly, while more than two-thirds of the men strongly believe that the government should do more to help the poor, the same proportion is least in the East zone that has the Left bastion. Maybe, the men in the east think that the government is already doing enough for the poor in the region.

2.6 His life outside the working hours

As the earlier findings indicate, his work and his career remain the most important aspect of the man's life. But what life does the man have outside the working hours? The findings are mixed. While the majority, and in some cases large majority, of men do lead a well-balanced life outside working hours, there is a significant minority of men who do not. And that may leave some questions unanswered.

About 80% of men claim that they are having enough sleep. Like all other indicators, we do not have a baseline to compare, but is this proportion a good sign? Or the fact that about 20%, and that means one in five, according to their own admissions, are not having enough sleep is actually a cause to worry? Perhaps it is. And in the East, this proportion is higher at 30%.

Over 80% claim they eat healthy, but are over 80% indicative of a healthy population? Men in the East zone again show the lowest proportion in this respect.

But only 39% exercise enough. That is low by any standard. West, with a high 44% is not high enough. The men in the East are the most sedentary, but that is quite well known.

About two-thirds of the men are relaxing at home. This may be at par with the finding that about 59% are also having fun outdoors.

More men in north - 81%, spend adequate time with family than men in any other zones, followed by 79% in the West. Men in the East and South exhibit significantly lower proportions at around 68%-69%. Yet, overall, at 75%, it shows that most of the men are basically family people in India.

Frequency of snacking, at 82%, is very high in the North and West but the same in the South is comparatively much lower at 42%.

	Enough Sleep	Eat Healthy	Exercise Enough	Relax At Home	Go Out & have fun	Enough Time With Family	Snack A Lot
North	81.6%	82.5%	42.7%	69.6%	56.7%	81.4%	82.8%
East	69.7%	72.5%	27.7%	62.0%	53.9%	67.6%	69.2%
West	78.1%	88.1%	44.0%	69.2%	57.7%	78.9%	82.0%
South	81.2%	86.4%	37.9%	62.0%	64.4%	69.2%	41.5%
All India	78.6%	83.8%	39.4%	66.2%	58.8%	75.1%	68.8%

Section 3: Man the Consumer

It can be said that we consume, and therefore we live. While that is true of all animals, human beings have taken the consumption activity at such a level that it has come to define the level and type of civilization that we constitute. We may not like it; we may write articles on it and be seriously concerned about aspects such as conspicuous consumption, but there is no running away from the fact that we live in an era of high consumption. There are three characteristics of any growing or developed economy that drive consumption level higher. These characteristics are:

- Newer categories or products enter the market and that adds to consumption portfolio. When a man would have normally used a fragrance on select occasions, today he has both deodorants and perfumes and he is not choosing one between them, but using both.
- More brand choices available to the man which in some cases of already high-category usage such as toothpaste, may not translate into an increase in the consumption level, but in most others such as apparel and accessories (there was a time when a man was happy to live most of his lifetime with one wristwatch and today, the latest campaign of the latest brand runs: How many watches do you have?) brand proliferation is adding to an increased consumption activity. Different brands with different brand-positioning trigger higher consumptions among many consumers.
- General lifestyle trend motivates higher consumption levels and practices at individual consumer level, and this trend almost cuts across all categories.

The Indian men, as the study findings indicate, are proving no exceptions to the above.

3.1 Personal Care Products

On personal care products usage, different categories exhibit different usage characteristics. For some products, men are regular and heavy users, for some others they are regular but not heavy users, and there are categories which are picking up penetration but yet to reach high levels. They exhibit high usage of traditional hair care products such as hair oil and shampoo, but register much less penetration of hair gel. Talcum powder has high penetration at 80% and skin cream 51%.

Among the users of the categories, Deodorant, Skin Cream and Talcum Powder, fairly significant proportions are heavy users.

- ✚ 26% of the deodorant users use it twice a day or more.
- ✚ 28% of the Talcum Powder users use it twice a day or more.
- ✚ 30% of the Skin Cream users use it at least once a day.

While more men use hair care products, fewer proportions are heavy users.

- ❖ 14% of the Shampoo users use shampoo thrice a week or more often, 80% using only once or twice a week.
- ❖ Only 13% of the Hair Oil users use it daily.

Toilet soaps and toothpastes report, expectedly, universal usage. And there are significant proportions of men who can be categorized as heavy users of these categories.

- 28% of men reported using toothpaste twice a day.
- 37% of men reported bathing twice a day using toilet soaps (survey period was July-August).

Men are changing brands. And how! The flux in their brand-use behaviour cuts across all categories, but is most evident for Toilet soaps (43% has used another brand a year ago), Shampoo (42%) and Deodorants (42%).

The phenomenon of high-brand turnover continues for categories which are typically for men, such as shaving accessories.

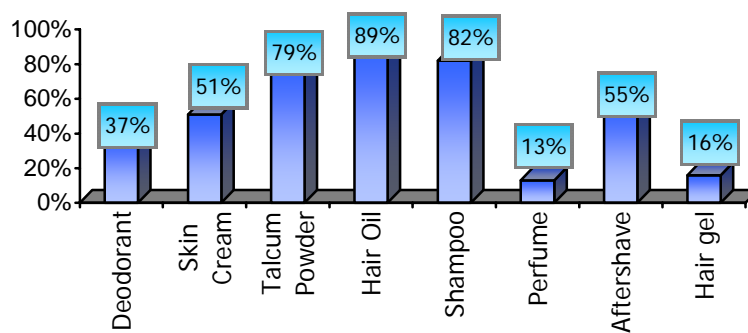


Figure 28: Percent usage of personal care product

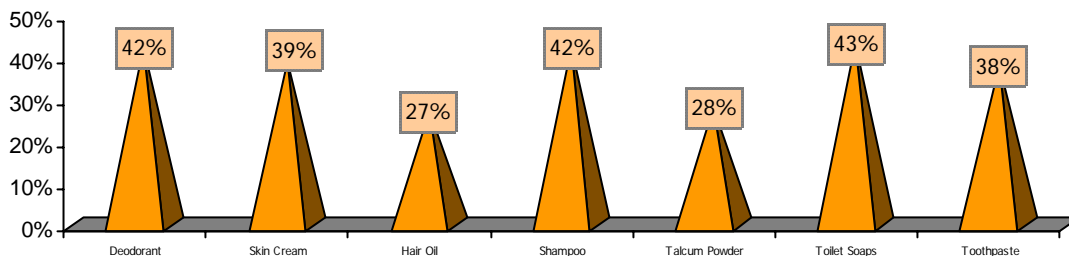


Figure 29A: Percent changed brands in last one year

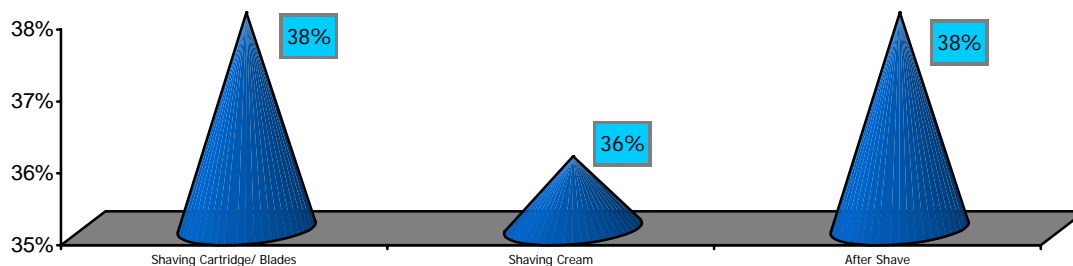


Figure 29B: Percent changed brands in last one year

3.2 Attire and Accessories

Men are buying clothes and accessories, a large number of them are buying in multiples.

- ✓ 74% of them have brought at least one pair of formal shoes in last one year.
- ✓ 65% have brought one or more formal trousers.
- ✓ 46% have brought a pair of jeans, some of them more.
- ✓ 72% have bought at least one formal shirt.
- ✓ 8% have bought one sunglass.
- ✓ 80% of men have bought at least one underpants.

Fairly significant proportions of them have bought 2 or more pieces in the past one year.

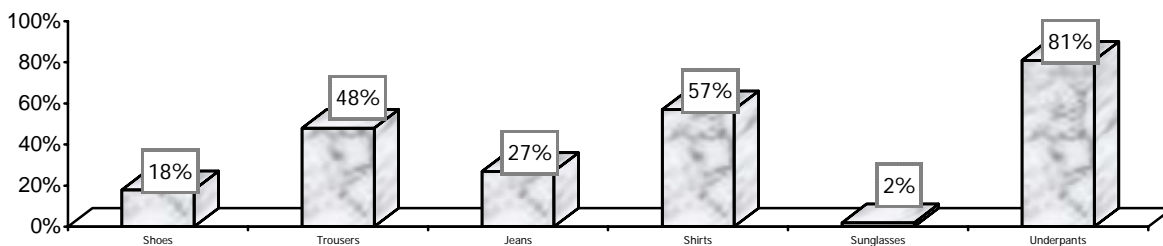


Figure 30: Percent who have bought two or more units

The Indian market, in each of these categories, constitutes of both branded and unbranded segments, each segment having significant market share. Indian men are making their purchases from both of these segments and share of the branded segment is emerging to be higher than the unbranded segment.

Men are also buying more than one brand in many cases of multiple purchases in a year. In fact, it may be only a rare occasion when a man repeats a brand in the same year unless he is a heavy purchaser, given the range of brand options that he has.

Share of branded products on all category purchases made by the consumer remains consistently above 50% for all categories, the least being for formal trousers (51%) and highest being for watches (92%)

Category	Number of brands bought by a category purchaser	Average share of branded products on all purchases by the consumer
Formal Shoes	1.12	65.0%
Casual Shoes	1.19	79.0%
Formal Trousers	1.25	51.0%
Jeans Trousers	1.32	75.0%
Formal Shirts	1.33	61.0%
Watches	1.10	92.0%
Sunglasses	1.12	69.0%
Underwear Pants	1.25	81.0%

3.3 Man the 'Snack'ist

There was a time when it may have been considered that chocolates, chewing gums and confectioneries are primarily meant for children. Then the young adults joined the queue. Well, while all of it still holds true, it seems that adult men today constitute a strong contender for them for these categories.

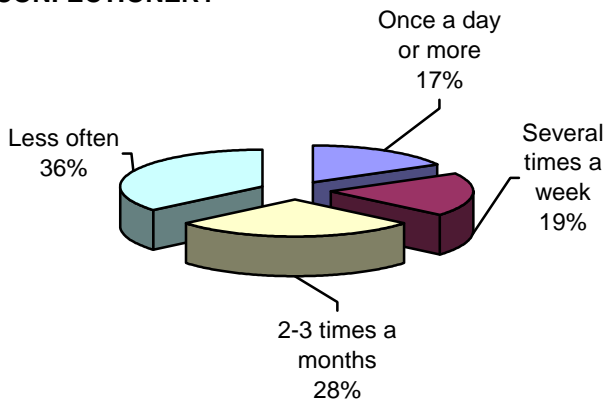
- About 24% men consume chocolates several times a week, whereas as much as 46 per cent of men consume chocolates rarely or not at all
- Almost 60 per cent of the men are rare or non-consumers of chewing gums, whereas 26 per cent are regular users, consuming several times a week.
- On the other hand, confectionary, hard and soft candies, shows higher consumption level, only 36 percent of men saying that they consume very rarely or not at all.

Soft drinks exhibit higher consumption penetration than sweet snacks - only 29 percent of the men were classified as rare or non-consumers of the category. About 9% of men claimed that they consume soft drinks very regularly, about once a day or more. Another 20% said that their consumption frequency is at least once a week.

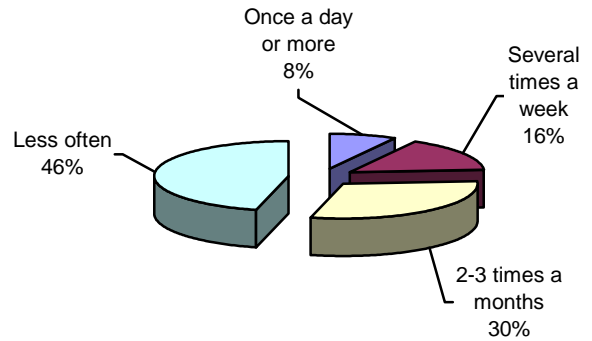
Branded wafers and chips constitute the latest category explosion in India. And clearly, adult men are posing a stiff challenge to children as a key target segment for this category. 32% of the men claim themselves as regular consumers with frequency over once a week. Another little more than one-third of the men consume wafers and chips about 2-3 times a month.

Figure 31: Consumption pattern of snacks

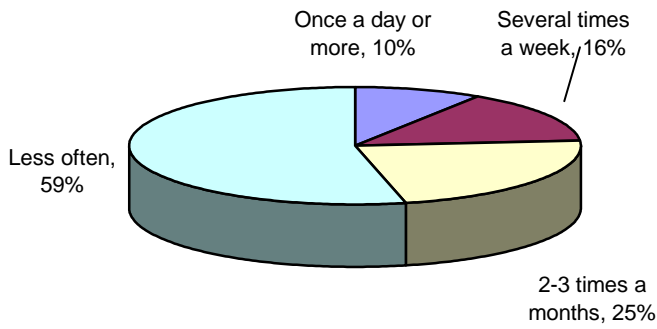
CONFECTIONERY



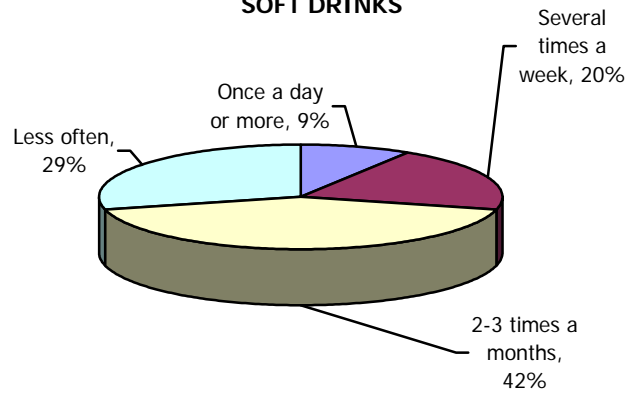
CHOCOLATE



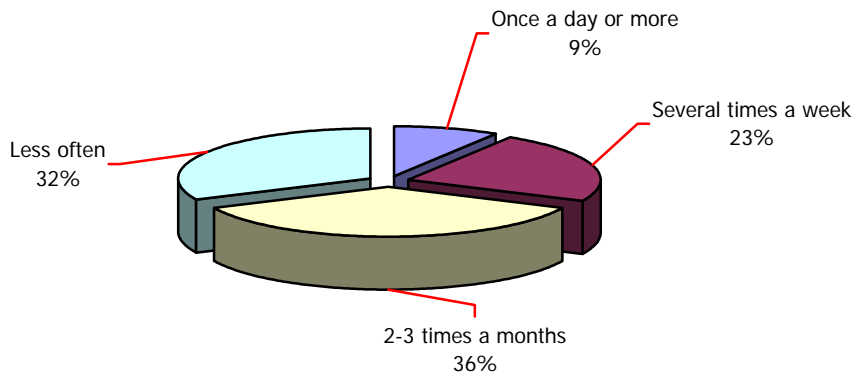
CHEWING GUM



SOFT DRINKS



WAFERS/CHIPS



Section 4: Men in their Grey years

As men cross the magic age-threshold of mid-forties, when fifty is just a few years away, it is said that the grey years are setting in. It is at this phase of life, when the men pause, perhaps stop, and take a look at their life – at what they have achieved and begin looking at the 'future'. The 'future', so far being only perceived as a future event, suddenly looks immediate and requires consideration and planning for. But the study reveals that most men above 45 years of age today may not have applied the pause, and they are yet to start planning for the future. Only 30% of the men said that they have started planning for the future, more of them from the East (39%) and West (37%) and the least from the South (19%).

Consistent with the above, it is not surprising that over 40% do not even know whether they would like to be employed after the retirement years or not. This is also true of the 55 years plus men.

However, what appears heartening, though it cannot be said whether it is driven by economic compulsion or choice, is that most amongst the rest plan to be employed after the retirement years, some partly but mostly fully.

Many men exhibit uncertainty and respond 'can't say now' about their future. This uncertainty is the most in the South zone (68.5%) and the least in West zone (25.7%). In the middle are the North zone (41.4%) and the East zone (34.2%).

Given the above, it comes as no surprise that the grey men also remain quite uncertain as to their living conditions after retirement. Although only about 7% fear that the condition after retirement would go down significantly, it is telling that 55% of them cannot predict one way or the other. The uncertainty remains high even after 55 years, when retirement is just a few years away.

The uncertainty remains very high among the South (75%) followed by North Zone (57%). It is 46% in the East and 40% in the West.

What is the level of support that they expect from their children in their post-retirement years? The question put to the men in their grey years revealed a surprising pattern of response. In the land of joint- families and traditional values, 48% of the grey men remarked 'they cannot say what level of support they would get from their children'. South again leads the zones in the level of uncertainty expressed by the grey men.

That only 5% of the men said that they expect no support from their children may be the silver lining, but that may be poor consolation.

Times are changing and in these changing times, the grey men appear uncertain about their future. They may not be insecure, but definitely are uncertain.

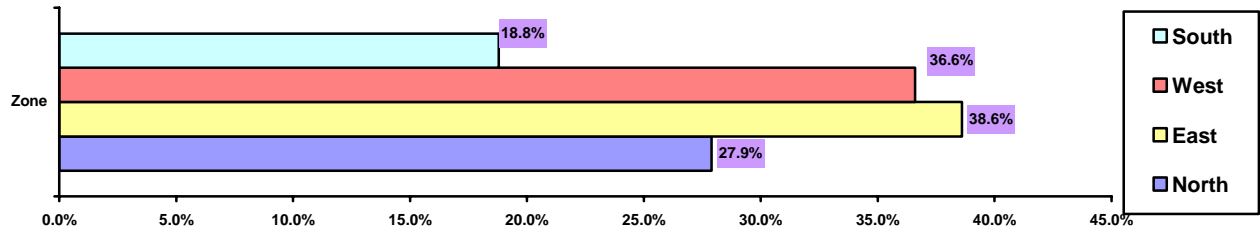


Figure 32: Percent share of 45 + men started planning for retirement

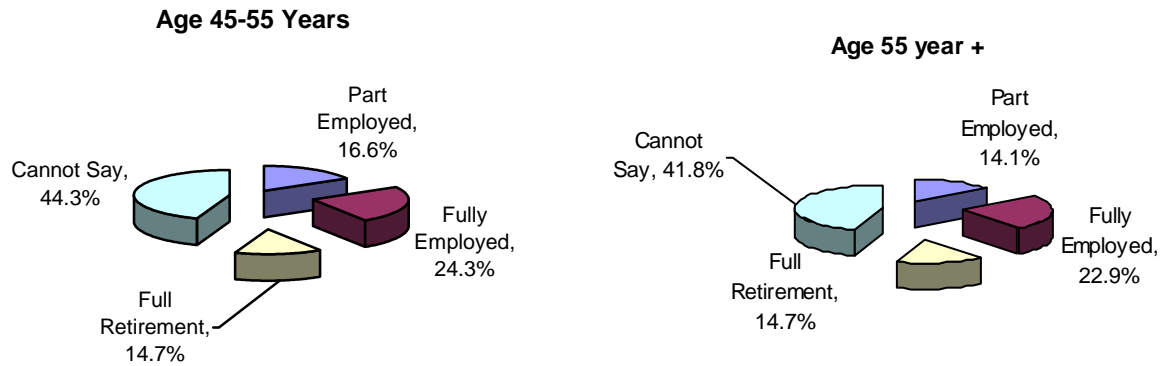


Figure 33: Post retirement plan

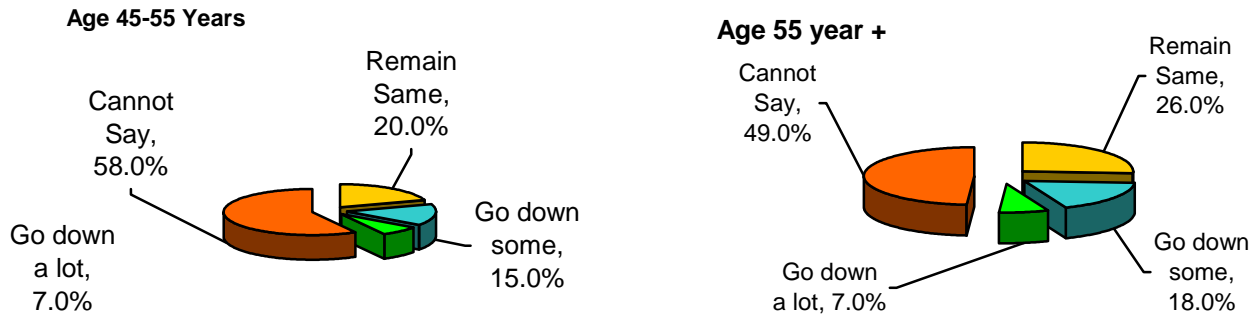


Figure 34: Perceived condition after retirement

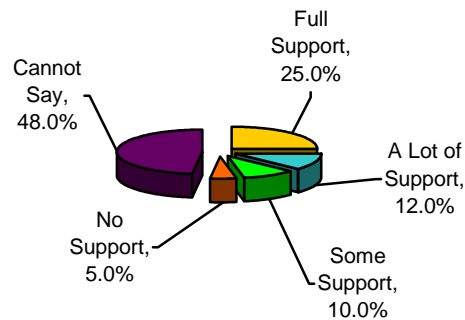


Figure 35: Support from their children after retirement

Section 5: The Unmarried Man

Consider the young unmarried years. Think of the young unmarried working man below 30 years of age, and a thought may come easily in the mind that they constitute a totally different set in comparison with the rest of the men who are married and older.

The survey findings exhibit that there may be some truth in this assumption, but it is not the whole truth.

- There are almost as many highly materialistic men amongst them (40%) as amongst the higher age group married men (37%).
- A majority of them, 60%, are highly exploring consumers, but so are 55% among the rest.
- 51% of them are highly price-conscious, virtually the same, 50%, among the others.
- Even with respect to brand-consciousness, they enjoy only a slight edge over the rest (About 44% are highly brand-conscious as compared to 42% amongst the rest).

Understandably, finding the right marriage-partner occupies the mind of many (44%). While overall 32% of the young men would like to marry a working woman, not a large proportion by itself, the same proportion is quite high at 45% in the East zone and 41% in the West zone.

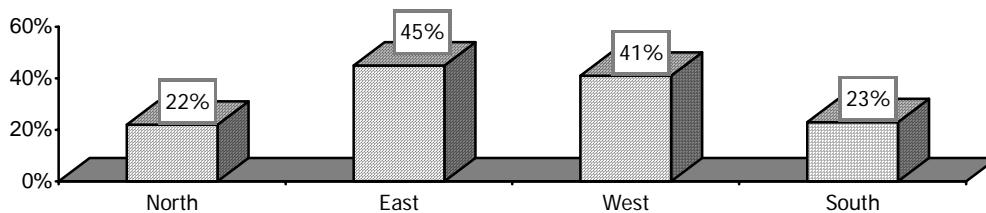


Figure 36: Percent would marry a working woman – by zone

Would they like to stay at home 'dad' after marriage- those saying 'Aye, Aye' (12%) will definitely not fill up a convention hall anywhere, but at 17%, the men in the East zone exhibit a rare attitude. A response rate of 14% in South zone, on the other hand, show that though not many are willing to marry a working woman (23%) but most of those who are willing to do so are also willing to be stay-at-home dad.

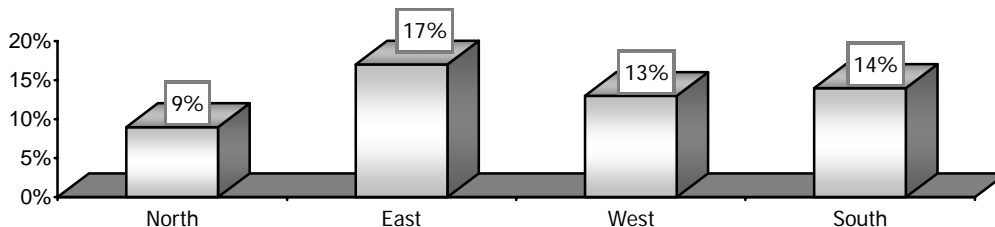


Figure 37: Percent would like to be home dad – by zone

They do not want many children, though only 22% of them stated they would desire only one child. Also about a third had not really thought about the issue.

They are also looking for nice things in life and most of them hope to get to the nice things by putting success as the highest priority in life.

Statement	% Strongly agree
It is important to me to have really nice things	74%
Being successful in my life is my top priority	63%

Almost half of them are willing to take chances in life but not all of them like speed. Even so, 38% of them would have liked to be a racing car driver.

Statement	% Strongly agree
It like to take chances in my life	48%
I wish I could be a racing car driver	38%

On dressing, wearing clothes and their physical appearance, they appear quite polarized. About half of them are particular about these aspects, and the other half appear quite carefree and bindaas.

Statement	% Strongly agree
I like to shop for clothes	50%
An important part of life is dressing smartly	50%
I try and do what I can do to enhance my physical appearance	45%
I only go shopping when I have to	60%

Only about half of them strongly consider themselves as multi-cultural Indians. Is that a cause for worry, or was this attitude held at a much lower level in the past and has actually increased significantly in the recent past? In the absence of baselines, it is not possible to answer.

A large differential is observed between the South zone and the rest of the zones on this aspect. Only 19% men in the South agree strongly to be labeled as a 'multicultural Indian', whereas in the North zone, the same proportion is 71%.

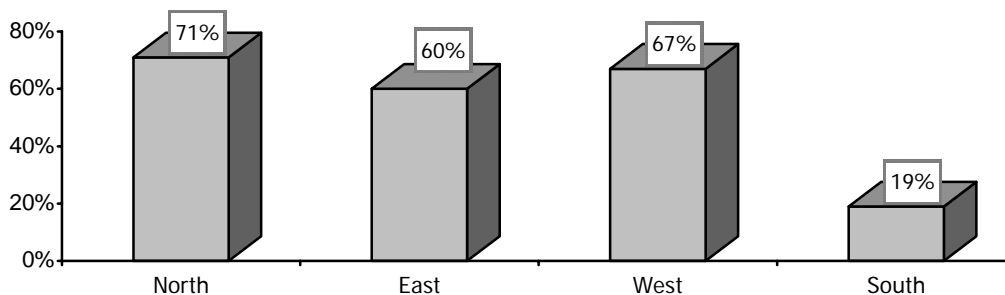


Figure 38: Percent consider themselves multicultural Indian

Could it be because the North believes its own culture to be paramount and representative of the entire country, whereas the South has a more inclusive approach than others? The findings call for some detailed probe and further analysis.

Annexure About the study

The study was carried out amongst urban Indian working men belonging to socio-economic classes A, B and C, drawn from all states of India excepting the north-eastern states and J & K. The study universe consisted of the entire urban region in the select states with a population of half a million or more. Survey was carried out in a total of 35 towns, consisting of 3 giant metros (population 10 million or more), 5 big metros (population 3.5 million to 7 million), 8 mid metros (population 1.5 million to 3.5 million), 6 mini metros (population 1.0 million to 3.5 million) and 12 wannabe metros ((population .5 million to 1 million). Systematic sampling at the household level was adopted as the sampling methodology (booster sampling was resorted to in some cases to meet the SEC by Age quotas at each sample town level), with suitably selected random start points.

Men were divided into four age segments- 21-30 years unmarried and three married age segments: 25-35 years, 35-45 years and 45+ years.

Total sample size was 11,370, across the 35 sample towns and the four age segments. The sample breakdown for the different age and spatial segments are given below.

Business Today, the business magazine, carried out a cover story on the Indian male based, on the findings of this survey. The magazine report can be viewed in the following:

<http://businesstoday.digitaltoday.in/index.php?latn=1&issueid=16&page=archieve>

MaRS has brought out detailed findings of the survey and these are being made available to the users on a syndicated basis. Town-wise and category-wise reports are available.

This report provides generic findings from the survey for general interest reading.

SAMPLE SPREAD

Age	Sample Size	Zone	Sample Size
21-30-Single	2880		
25-35- Married	2830	North	3160
35-45-Married	2830	East	1680
45+ Married	2830	West	3330
TOTAL	11370	South	3200
		TOTAL	11370

Town Class	Sample Size
3 Giant Metros	2800
5 Big Metros:35-70 Lakhs	2800
8 Mid Metros:15-35 Lakhs	2260
6 mini Metros:10-15 Lakhs	1540
12 Wannabe towns-:5-10 lakhs	1970

Sample Towns

Delhi	1000	Ranchi	130	Nashik	180
Faridabad	240	Bhubaneswar	160	Mumbai	1000
Chandigarh	160	Asansol	160	Hyderabad	600
Ludhiana	240	Kolkata	800	Warangal	160
Jaipur	320	Ahmedabad	400	Vijayawada	240
Jodhpur	160	Vadodara	320	Bangalore	800
Gorakhpur	160	Bhavnagar	160	Mysore	160
Lucknow	320	Bhopal	240	Kochi	240
Kanpur	320	Jabalpur	240	Chennai	600
Varanasi	240	Pune	400	Coimbatore	240
Patna	240	Nagpur	260	Salem	160
Raipur	160	Aurangabad	130		