

UNFOLDING OF A YOUNG NATION

Y Mind 2015



MaRS

MaRS Monitoring and Research Systems Pvt. Ltd.

relationship
family society
politics
career aspirations
gadgets environment job
friends traditions
culture

MaRS:Y Mind 2015

First, some statistics that we all are familiar with.

Every third person in an Indian city today is a 'youth'. In less than a decade, the median individual age in India will be 29 years, making it the youngest country in the world. In sheer numbers, the population in the age-group of 15-24 is 232 million. Being a nation with a diverse mix of rural and urban populations, 74 million urban youth complement 158 million rural youth. In another 10 years, there are likely to be more urban youth than rural.

Young people not only purchase products and services, but also significantly influence purchase decision-making in the family. They have interesting world views and outlooks towards life, relationships and careers. They shape perspectives on politics, tradition and societal values. Youth icons are drawn from multiple fields. With the phenomenal growth of mobile and internet connectivity in India in recent times, communication has undergone a tremendous flux. The use of social media, apps and the net have led to a networked web of shared information, perspectives, and experiences, and opened up a world of possibilities that would have been unimaginable some years ago.

Expectedly, young people have been brought under the spotlight of every marketing and advertising professional. It is evident that the youth population today not only constitutes a major market segment, but also, as the cohort advances in age, will soon become the largest market segment.

As a result, everyone wants to find out more about young people today. What do they think, what drives their aspirations and actions? What values and belief systems do they hold? More than ever before, from policy makers to product manufacturers, service providers to communication designers, all are eager to gain a 360 degree understanding of young people in India today.

Clichés abound. Most of them apply to the young, may be all of them to some extent! But a major insight that MaRS:Y Mind unravels is that youth are truly multi-faceted. In the coffee-shops in urban India, the 'traditionalist' youngster downs coffee with the 'liberal-minded'. The 'price-conscious' young adult buys premium brands and the 'college rebel' goes out with parents on weekly time outs.

At the end of the day, the times we live in are really all about engaging deeply with our youth. And we are happy to bring out some facts about India's young that we hope will expand understanding and sharpen insights.

But... only some facts and some understanding!

MaRS:Y Mind 2015 is a study that was carried out among 5,202 urban youth in 15 state capitals and major towns in India - Delhi, Lucknow, Jaipur and Chandigarh in the North; Kolkata, Patna and Ranchi in the East; Mumbai, Ahmedabad, Pune and Indore in the West; and Chennai, Bangalore, Hyderabad and Kochi in the South.

The respondents included young men and women from age groups 18-21 years and 22-25 years, belonging to households with durable ownership of CTV, Refrigerator and at least two of the following: Car, Home computer/Laptop, AC, and Washing machine. Respondents were either students (undergraduate or above) or employed (with an educational qualification of graduation or above). Additionally, they were regular user of internet and members of at least one social networking site. The survey was carried out from August 1 to August 20, 2015.

The Family Man

A significantly large majority of youth exhibit very strong bonding with their family. Over two thirds prefer the joint family structure over that of a nuclear family. Similar proportions indicated they'd refrain from, or advise against, smoking in front of elders. About 80% plump for a strong family bond, believing it has strong relevance today.

A strong family bond is advocated by more young women (83%) than young men (77%) (Fig. 1.). Also, respect for elders is somewhat more evident among the older age group, 21-25 years, than among the younger age group (Table 1).

Age group	No smoking in front of elders	Listen to elders
18-21 years	66%	65%
21-25 years	74%	71%

Table 1 Youth behaviour across age segments

A large majority of the youth (75%) also describe themselves as happy; though it may cause some concern as to why about a quarter of them do not do so! There is no doubt that the young, like everyone else, derive their happiness from many sources. But it may not come as a surprise that in consonance with their bonding with family, a significant 34% derive their happiness mainly from their parents and family. For 23%, the main source of happiness is their friends (Fig.2.), and that includes friends from the opposite sex. Interestingly, for only 18% of the youth, their main source of happiness is a derivative from the environment that they live in - college or workplace or the money that they earn or receive.

Fig. 1. Family orientation

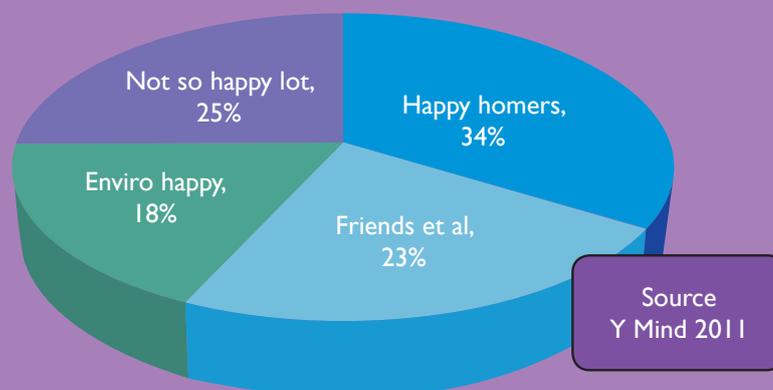
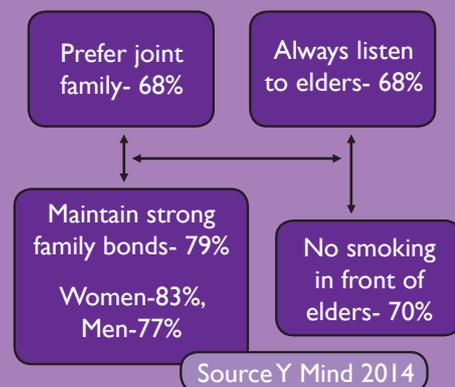


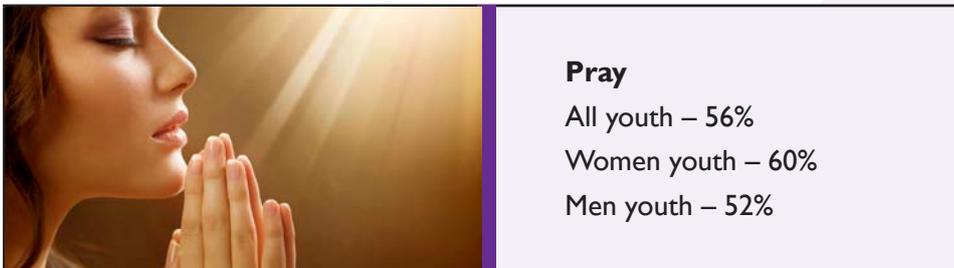
Fig.2. Youth happiness decoded

The Cool and the Not- So- Cool Traditionalist

From jeans to sneakers, cars to computers, mobiles to coffee shops and may be for a million other categories reflecting modern lifestyles, young people remain the primary focus for manufacturers and advertisers. Globalization and liberalization, it is verily assumed, have created a generation that is into the latest fads, diets, gadgets, sexual attitudes or fashion, and all of them basically dance to the same beat. Though this appears to be generally true, Y Mind also reveals a startling fact : the majority of Indian youth today are traditional at heart.

Religious practices continue to be important to Gen Y with 56 % claiming that they pray regularly. This proportion was as high as 60 % among the females. (Fig. 3)

Fig. 3

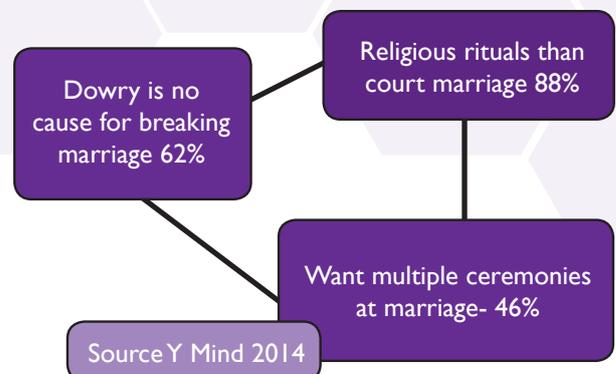


On marriage, 40 % of the young said that they would go ahead and marry a person selected by their parents without question (Fig.4.), 27% would also leave selection to their parents but they would need to approve. 29% would like to choose but would like their parents to approve of their choice, and just 4 % said that they would marry a person even if their parents strongly objected.

What emerges is that there is a large majority of Indian youth today who are tradition-bound and conservative. That could also imply that they can be regressive. Nearly seven out of ten young men and women felt the onus was on women and not men to save marriages from divorce; less than four out of ten men felt that they should share housework with women; and, alarmingly, more than six out of ten middle-class youth in Indian cities are fine if dowry is involved in their marriage.

Are the youth cool? Or not- so- cool? Your view on this is as good as anyone else's.

Fig.4. Attitudes towards marriage



The Goal- Setter

Young people get segregated into four neat segments on their goal- seeking behaviour. Almost a third, 32%, are quite amorphous- they simply want to enjoy life (Fig.5.), regardless of where the enjoyment is coming from. 20% would rather pursue pure material goals.They clearly want financial freedom, safety, stability and occupational success. Another 21% want to lead a physically healthy life; other life goals can follow after that. And a very significant 27% display non-acquisitiveness, seeking to pursue ideals, achieving intellectual growth, exploring places or simply being a good family member.

But goals apart, they get split almost right down the middle on the realism quotient. While almost half of them, 46%, are sure that they will achieve their goals, the other half is not so certain!

Almost confirming the above is the optimism quotient among the youth today. 56% feel they are more ambitious than the previous generation. While that represents the majority, 44%, who do not think so, constitute a very large minority population. This may go against the popular belief and it clearly suggests that there is a very large number of youth in the country today who do not feel that they are in a position to take advantage of the flux and changing times in the country.

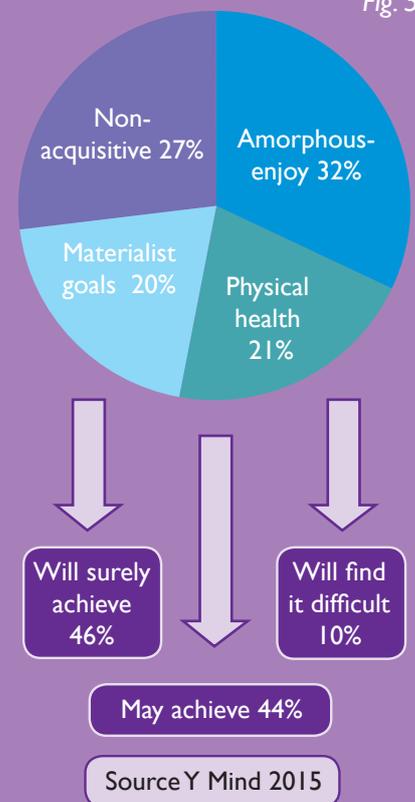
On the other hand, there is almost unanimity in the opinion that the country is on a growth path. 84% of the youth feel “optimistic” about India’s future.

Politically ambivalent

In 2013, a year before the national election, three quarters of young people said that they would like to vote in the election that was around the corner. Presumably most of them did so as it was reported that Mr. Modi won mainly because the youth voted, and they voted for him. But enthusiasm for voting apart, only 15% of them said that they track politics regularly. Two thirds believe that politicians are generally corrupt, and a very large majority believes that any person with criminal background should not be allowed to contest. But only one among seven of them would consider joining politics!

Two years later, while 68% felt that the performance of the NDA was in line with expectations, as many as 85% of the youth who voted for the NDA in 2014 will still vote for them in 2015. Clearly, while they may not be the politically savvy generation in India, they are not making any hasty judgments!

Fig. 5.



The Spending Consumer

That the young spend on a wide variety of products and services is known to all of us. Y Mind 2015 reveals that they quite evenly distribute their spends, though the highest share of the wallet goes towards personal care and grooming. It may be concluded that today's youth is a self-conscious generation.

Young men spend only a slightly less proportion of their wallet share on personal care and grooming than young women! But the difference is not really significant, perhaps breaking a myth, if it still existed, that young women may be more concerned about their grooming than young men. This stereotype may still exist among older Indians, but it's definitely not true among the young anymore. In fact, Y Mind reveals a startlingly similar wallet share pattern among both men and women when it comes to expenditure heads (Fig.6).

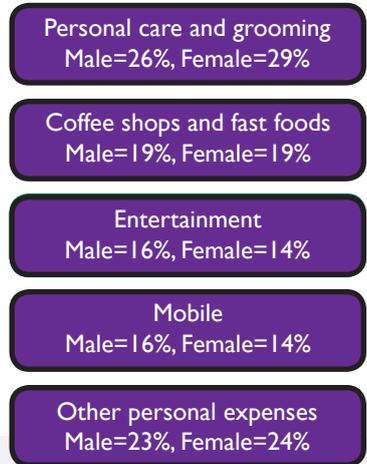


Fig.6. Gender differentiation in Wallet Share



While the large majority is extremely careful to limit their expenses within their means, there is a small but significant proportion that is extravagant.

The young are also redefining 'value- for- money'. Contrary to popular belief, most of them, (71.6%), are not looking for a cheaper bargain. Welcome to the world of change. A significant third of the young population likes to keep up with the latest fashion, while a large majority of about two thirds does not. On the other hand, they all spend a large part of their wallet share on personal grooming. Also, only about 18% aver that they do not particularly care about style. The unmistakable impression that all of this conjures up is that the young are keen to define what is fashion and style for them, and are not so taken in by prevailing trends in such matters.

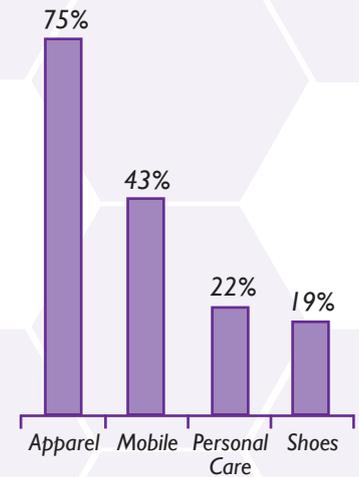


Fig 7. Purchased through internet in past one year

The internet is used as a shopping mall and is accessed for a wide range of purchases. Everyone has made some purchase or the other over the last year on this medium. Apparel is the most popular article purchased, with 75% having done so in the past one year. And a whopping 43% have bought mobiles from the internet (Fig.7).

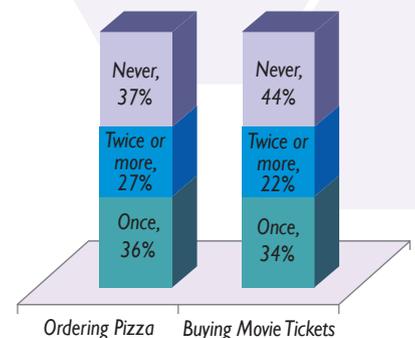


Fig 8. Pizza and movie tickets purchased through internet in past one year

27% of young people in top eight towns in India have booked taxi services on line, the most in Mumbai followed by Delhi, Chennai and Bangalore. Pizzas are ordered online, and movie tickets are bought off the net, with a high degree of frequency in the last one year (Fig.8).

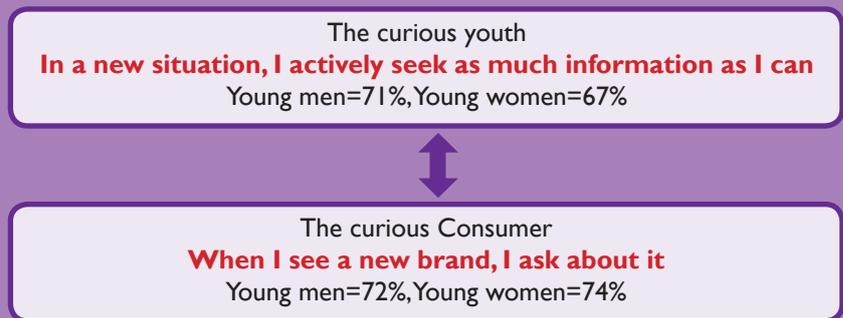
The Curious Consumer

It has always been assumed, and perhaps rightly so, that the young have an enquiring mind. Accessibility to online information and the use of mobiles act to whet their curiosity continuously. Over two thirds of the young aver that they actively seek as much information as they can in any new situation.

This curiosity trait has naturally extended into their behavior as consumers. When they see a new brand, they seek more information about the same.

So what do the youth do when they become curious about a brand having viewed the advertisement? An attempt to answer this question led MaRS to develop “The Curiosity Module”. The basic premise of the module is that curiosity leads a person to enact a set of intermediate behaviours and the more the incidences of intermediate behaviours, the greater is the impact of the communication. Three main manifestations of curiosity are introspection, interpersonal communication and interactive behaviour.

And, the youth, as Y Mind 2015 found out, engage in these intermediate behaviours on a large scale!



MaRS Curiosity Module of measuring campaign efficacy

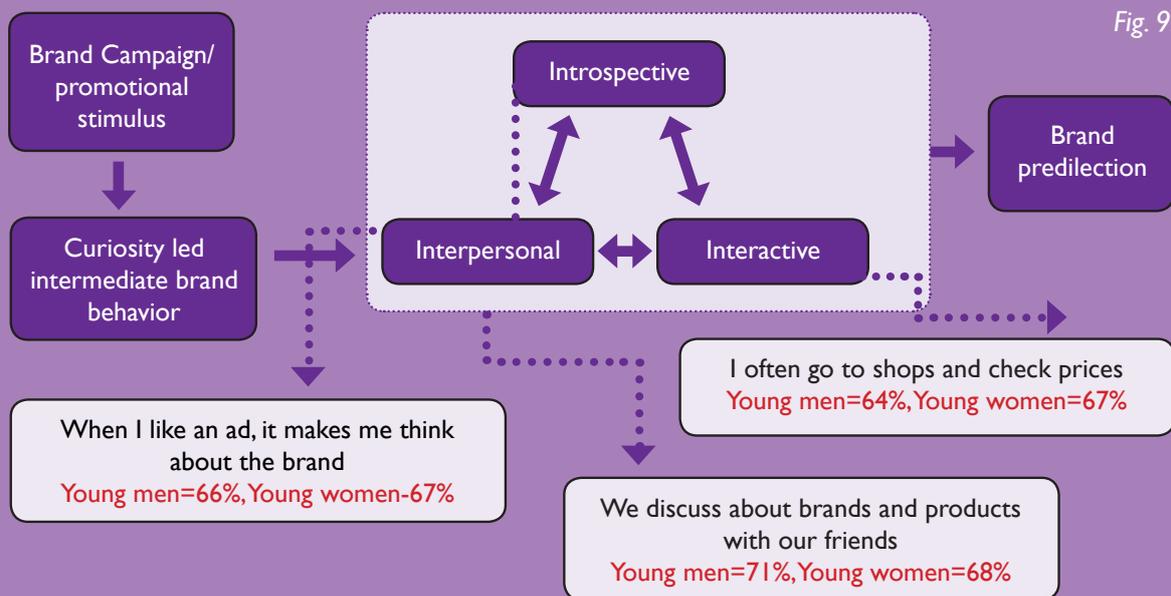


Fig. 9.

The Segments

As brand managers and advertising professionals, you position your brand differently for different categories, seeking relevance and USP for your brands. We have learnt from our annual Y Mind studies that it is not possible to straitjacket any young individual. Every young person is this, and that, and also some other being as well. That the young are multidimensional is clichéd, but true. For one brand you may like to address youth who are comfortable with their family, and for another you may like to address a rebel. Many discussions with communicators have revealed that workable sets of segmentation should be evocative and visual. Towards that end, we have attempted a series of attitudinal segmentation of the youth that may help you to assess the size of the segment that your brand positioning is attempting to reach, and equally importantly, pre-test and post-test your communication in a more focused manner.

Life Orientation segments

Outlook to life

- **The conservatives** - 60%-65%: Prefer joint over a nuclear family, would like to preserve many Indian traditions, would like several ceremonies during their wedding
- **The flexibles** - 15%-25%: Prefer a nuclear family; they exhibit higher gender sensitivity
- **The mixed set** - 15%-20% - all others

Derivatives of happiness

- **Happy homers** - 34%: Generally happy, and main source of happiness is home, parents and siblings
- **Friends et al** - 23%: Generally happy, and main source of happiness is friends, of both sexes
- **Enviro happy** - 18%: Generally happy, and happiness is mainly derived from the activity space - college/office
- **NOSH** - 25%: Not- so- happy lot

Special attribute segments

Technology freak

42%: It is very important for them to have the latest technology and gadgets

The wired generation

- **Hooked** - 18%: Access social networking sites daily and get extremely restless if cannot do so

for even one day

- **Almost Hooked** - 29%: Access social networking sites daily, can survive a day without, but not two days
- **Relaxed**: 53%

Game trier youth

62%: Will try anything new if it looks interesting or good, without waiting for any reference or recommendation from any source

Life style segments

Attitude to spending

- **Spendthrift** - 20%: Spend more than current income/allowance
- **Careful spender** - 28%: Save some money from income/allowance, look out for bargains
- **Moderates** - 52%

Fashion conscious

35%: Like high fashion brands, believe that dressing well is an important part of life

Fitness conscious

- **High** - 18%: Exercise regularly and diet - conscious
- **Medium** - 29%: Exercise regularly but not diet-conscious, or exercise periodically but diet-conscious
- **Low** - 53%

The Youth Brands

Young Men	
Youth Brands	Rank
Samsung	1
McDonald	2
Nokia	3
Adidas	4
Nike	5
Levis	6
Sony	7
LG	8
Reebok	9
Coke	10
CCD	11
KFC	12
Axe	13
Pepe	14
Apple	15
Lee Cooper	16
Puma	17
Bata	18
Micromax	19
Fast track	20

MaRS:Y Mind 2015 asked the young:

You are a consumer of many products- your clothes, mobile, electronics, restaurants and cafes, shoes, personal care items, cosmetics and many more. Of all the brands you use regularly, when I say a brand specifically made for the youth, which three brands come to your mind?

← And the top 20 brands are →

To analyze these, we made an assumption. A brand mentioned by a young person in this context actually reflects the level of involvement with the corresponding categories

The higher a brand is ranked, and more brands within a category are ranked among the top, the category scores more, implying higher involvement of youth with the category

The score for each category was thus computed

The findings are very interesting!

For young men, four categories scored 25 or more, the highest involvement category being Mobile (score 73), followed by Sportswear (52), Hang-out joints (38) and Denims (27). For young women, only three categories scored over 25. Personal grooming (score 105) outscored all others by a distance- Hang out joints (41) and Mobiles (35).

The differentials among young men and women on this account, tells a story in itself.

Young Women	
Youth Brands	Rank
Samsung	1
Lakme	2
McDonalds	3
CCD	4
Garnier	5
Nokia	6
Dove	7
Fair & Lovely	8
Nike	9
Pond's	10
Revlon	11
Olay	12
Levis	13
Loreal	14
Ayur	15
Fast track	16
Barista	17
Reebok	18
KFC	19
Bata	20

↓

High involvement categories	Score
Mobile	73
Sportswear	52
Hangout joints	38
Denims	27

↓

High involvement categories	Score
Personal grooming	105
Hangout joints	41
Mobiles	35

232 million Indians are in the age group of 15 to 24 years. This is 19% of the total Indian population. In USA it is 14.1% and in China it is 17.8% of the total population.

74 million urban Indians are in the age group of 15 to 24 years. This is 20% of the total urban Indian population.

29% of population in Daman district are young, the highest proportion among all districts in India. Kottayam district in Kerala has the lowest youth population in the country, at 13.6%.

396 out of 640 districts have more than 80% female literacy among youth (15-25 years). 100% female literacy is in Mahe (Puducherry) and Serchhip (Mizoram) districts.

2 districts in Uttarakhand, namely Rudraprayag and Almora, have the highest female to male ratio, 115 females per 100 males among the youth population.

126 out of 640 districts have equal or more female youth population than male (15-25 years).



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