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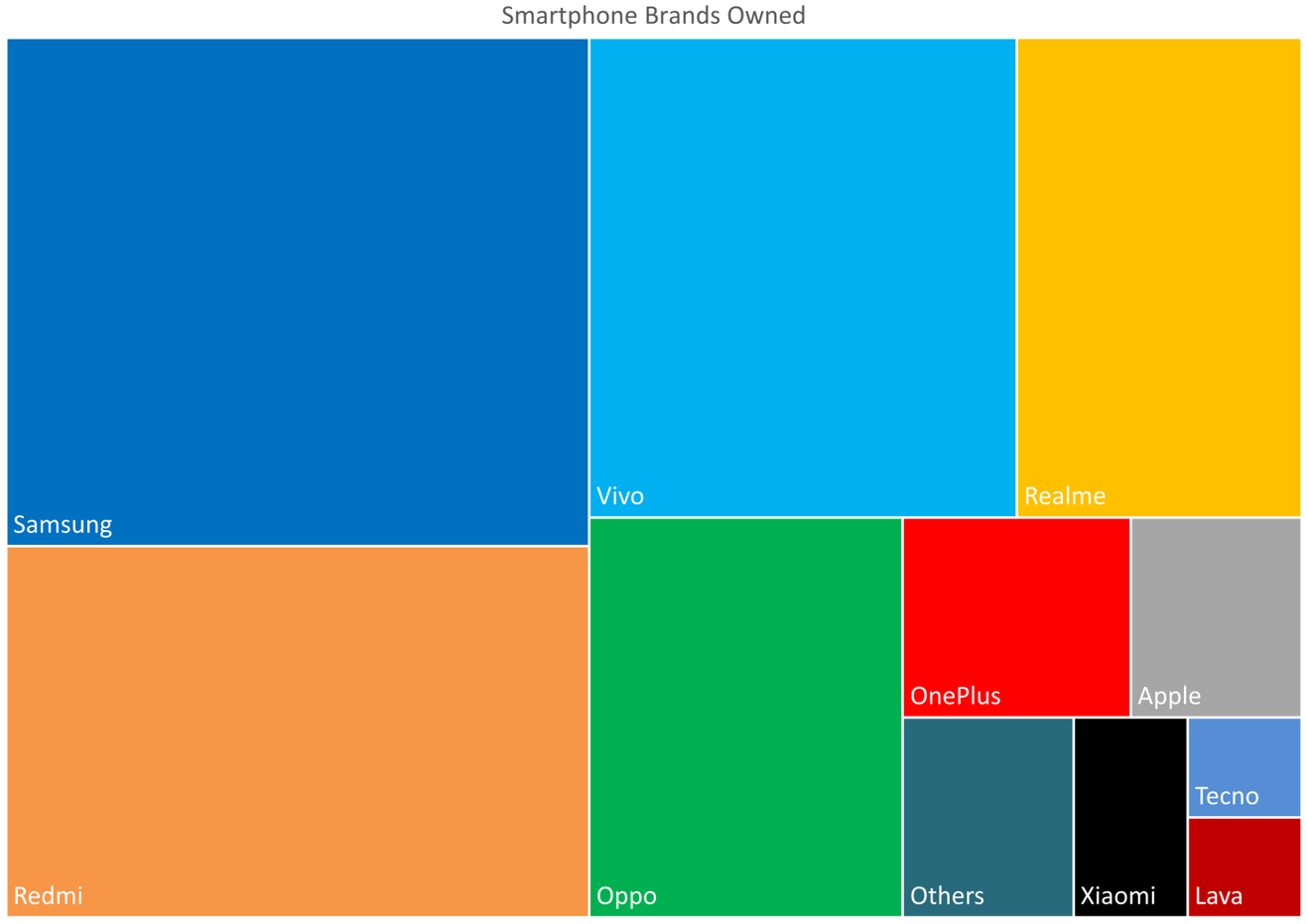
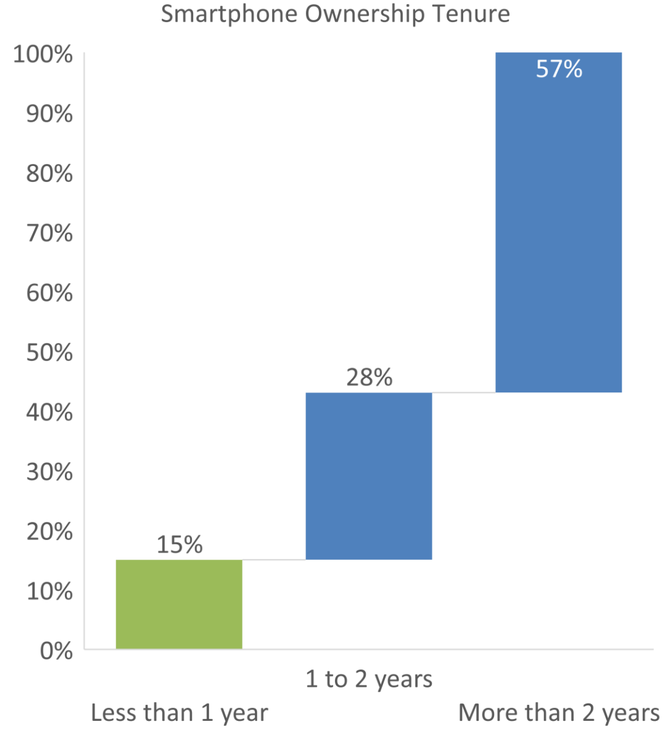
INDIA CONNECTED CONSUMER 2023

“The Connected Consumer wave is shifting from entertainment to comfort and convenience.”

The connected consumers represent a cross section of smartphone users. However, those owning smartphones for over 2 years are buying other smart devices making them a connected consumer.





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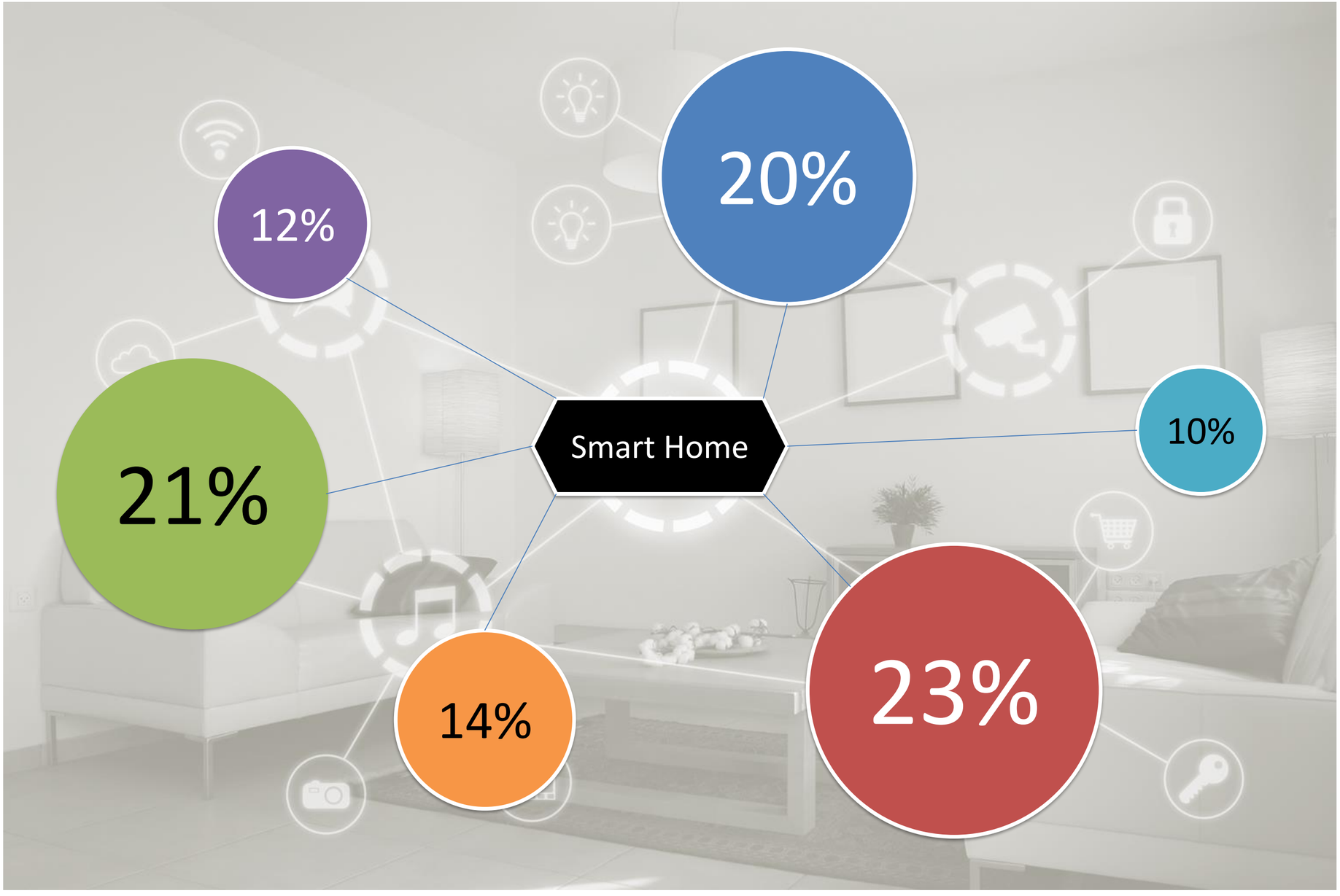
Indian Connected Consumer and the Smart Home Categories



Smart Personal

Smart Comfort & Convenience

Smart Home Infra

Smart Entertainment

Smart Security

Smart Home Appliances

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What does a Connected Consumer use?

Smart Home Appliances

Smart Oven
Smart Washing Machine
Smart Vacuum Cleaner
Smart Air Fryer

Smart Security

Video Enabled Doorbell
Smart Door Lock
Smart Camera

Smart Comfort & Convenience

Smart Lights
Smart AC
Smart Heater
Smart Switch
Smart Air Purifier
Smart Clock
Smart Water Purifier

Smart Personal

Chromebook
Tablet
TWS
Smart Watch/Fitness Band

Smart Entertainment

Smart Speaker
Streaming Devices
Smart TV

Smart Home Infra

Router
IR Blaster
Thermostat

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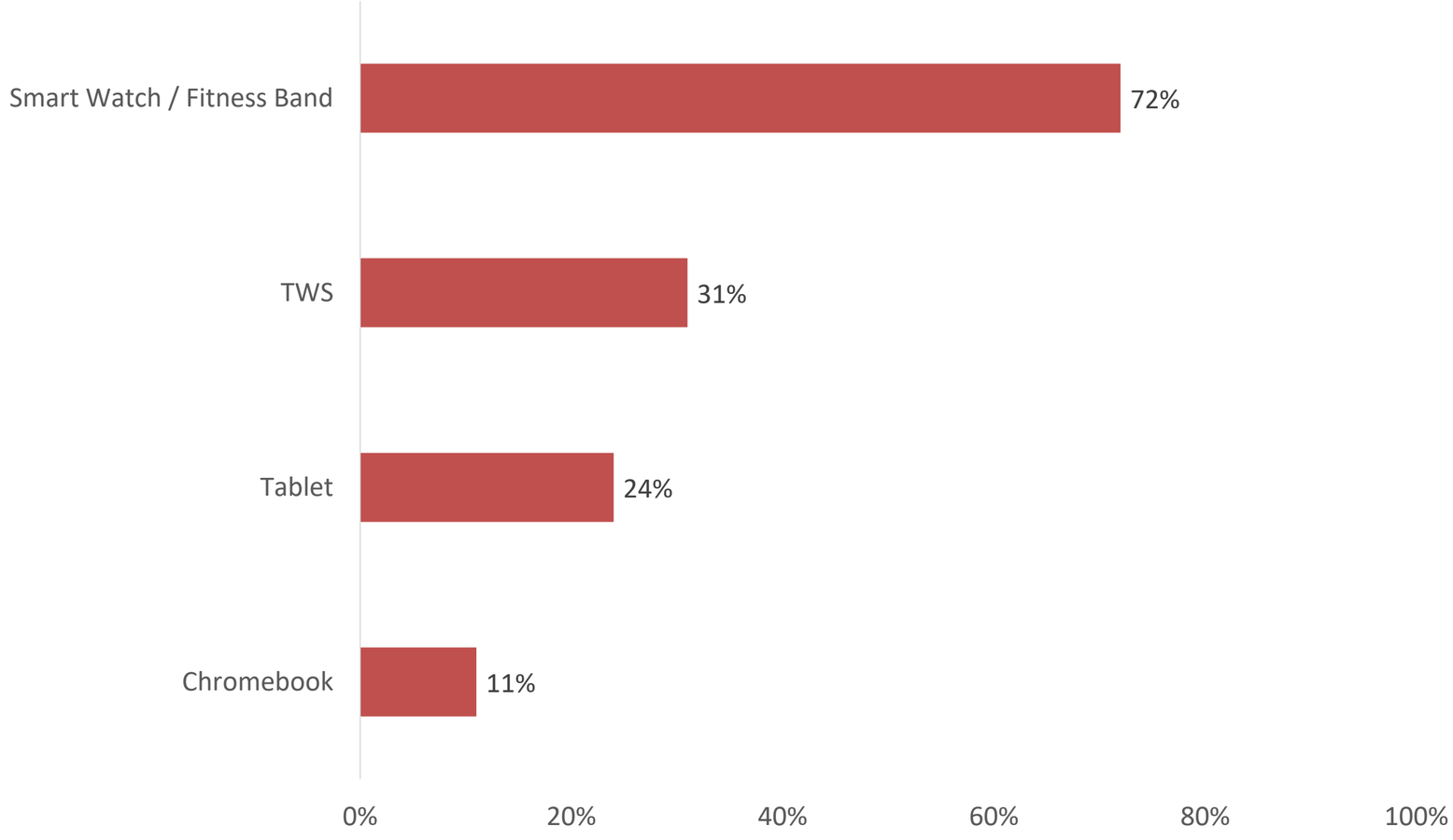
Affordability is driving adoption in Wristables (Watch/Band). Among the new categories, Chromebooks are taking off as an affordable alternative compute device especially for educational purposes.

Smart Personal



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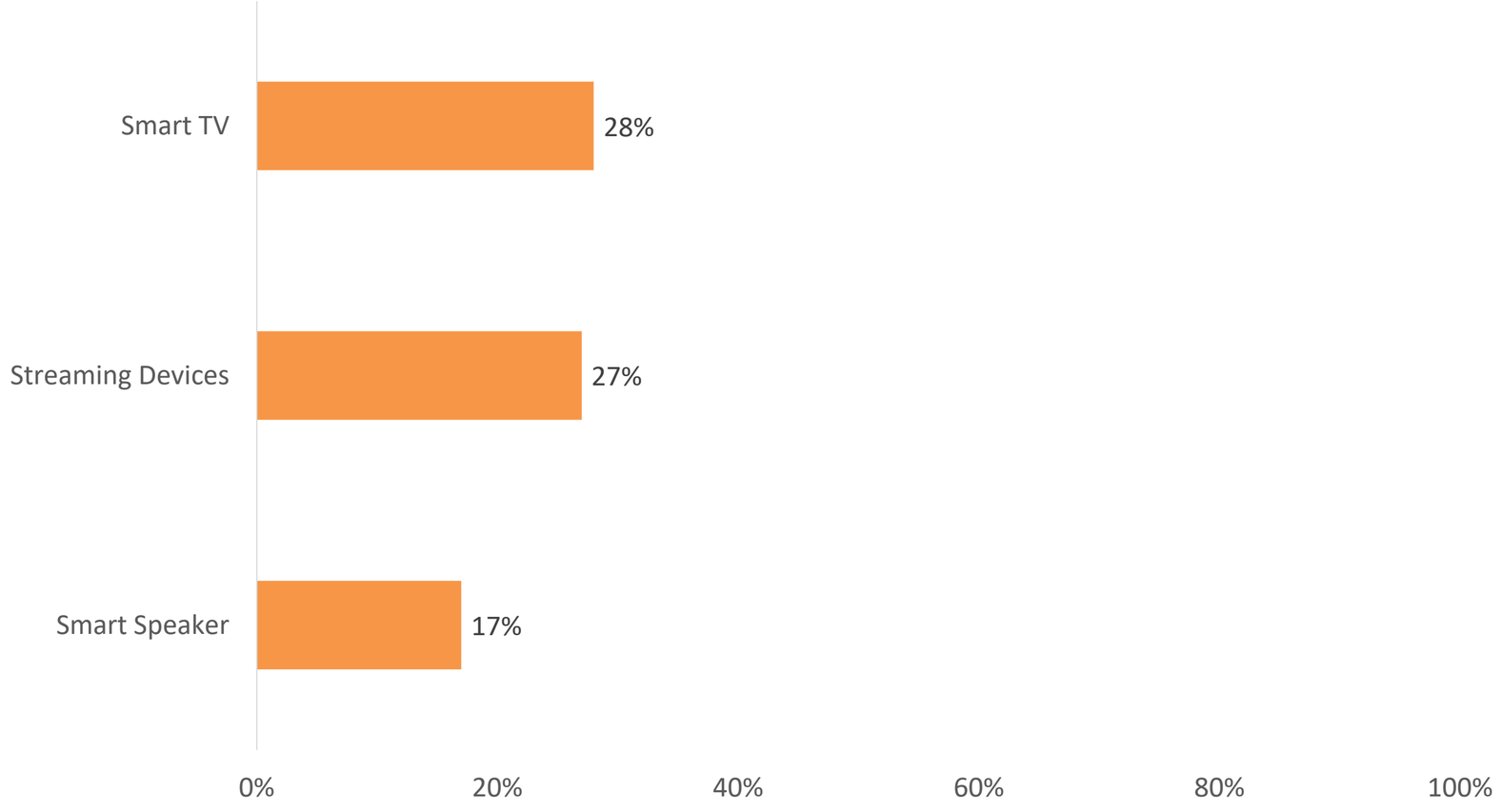
TV viewing continues to be the major contributor of this category either through Smart TVs or streaming devices. Smart Speakers are catching up fast as devices of entertainment and instructing other smart devices in homes.

Smart Entertainment



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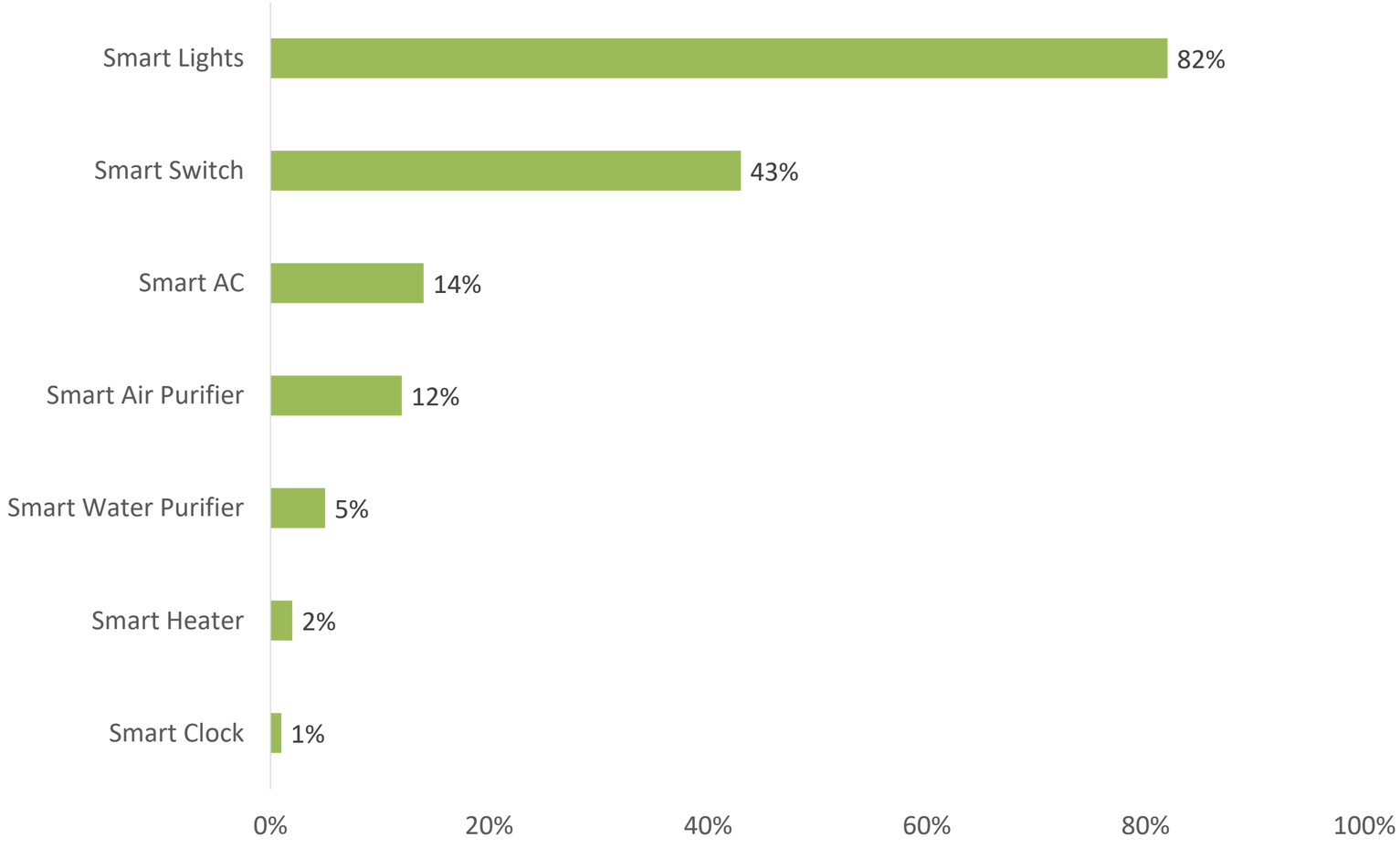
With automation being the flavour of home improvements, the standard gadgetry is ‘smartising’ uplifting comfort and convenience of living.

Smart Comfort & Convenience



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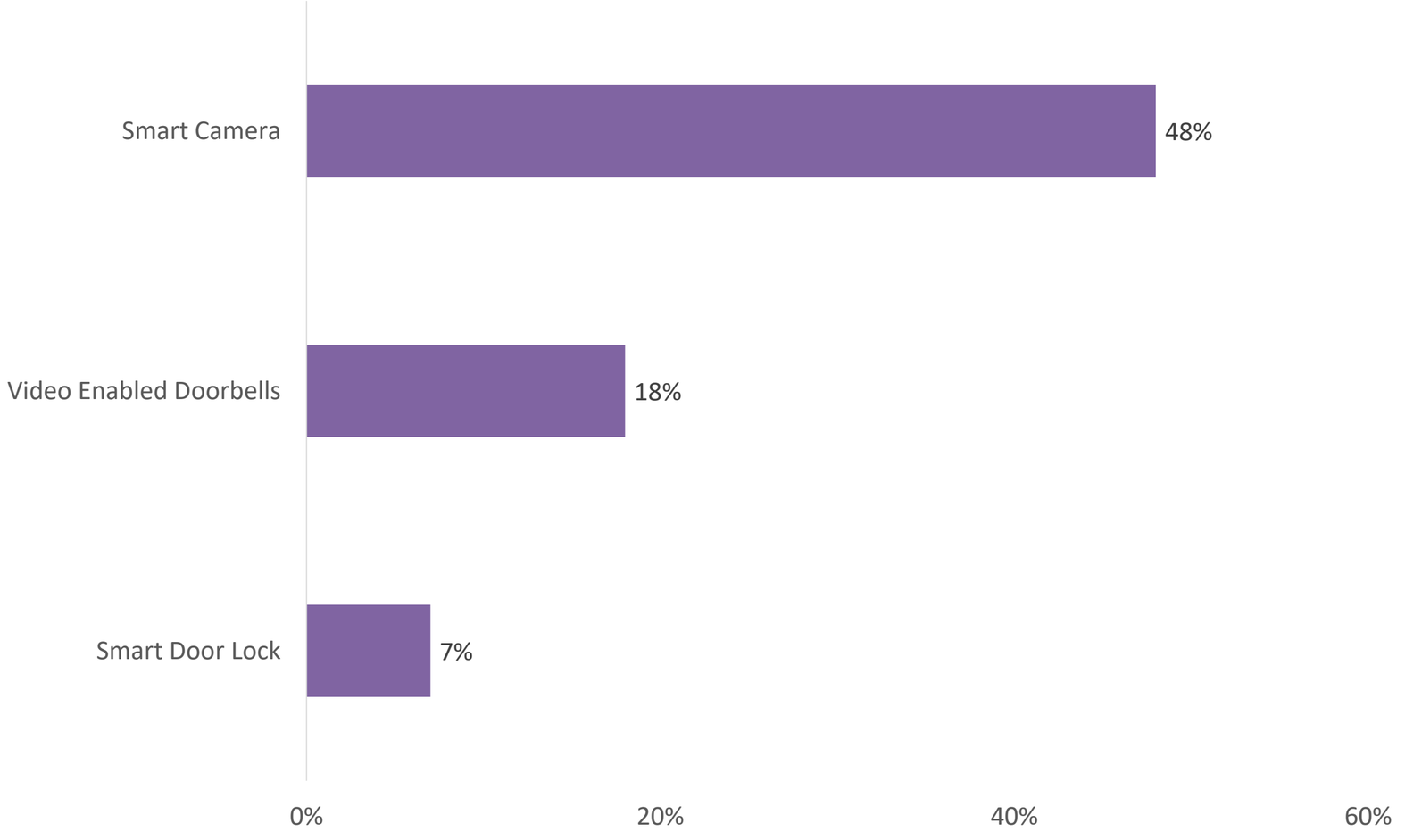
The security imperative continues with growing nuclear families and families with elderlies. New forms of smart locking systems are gaining interest among users.

Smart Security



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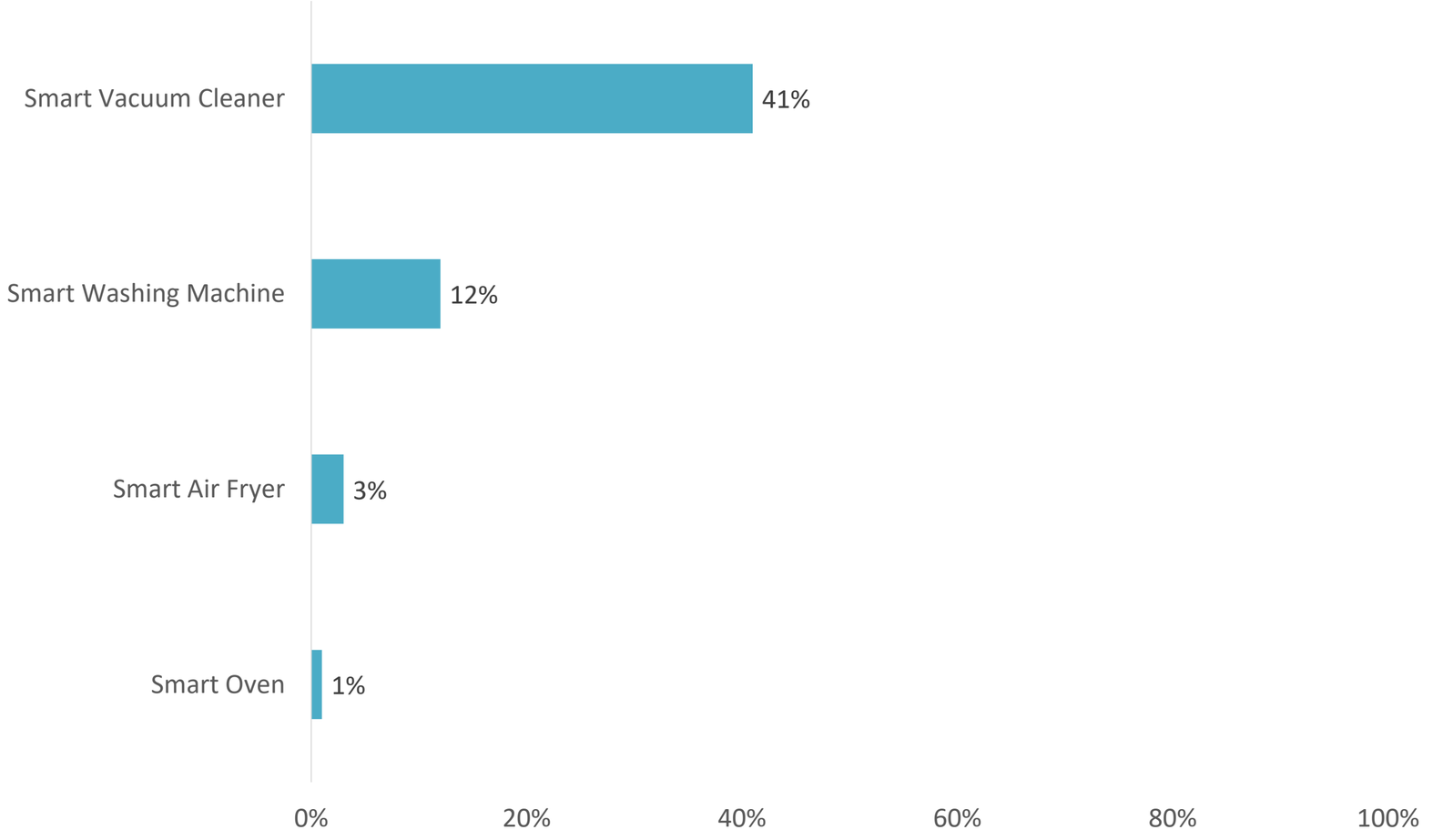
Covid-19 triggered the *'atma-nirbharta'* trend in homes increasing the reliance on smart gadgets to do household chores. Consumers are looking for smarter appliances to equip homes with intelligent home appliances.

Smart Home Appliances



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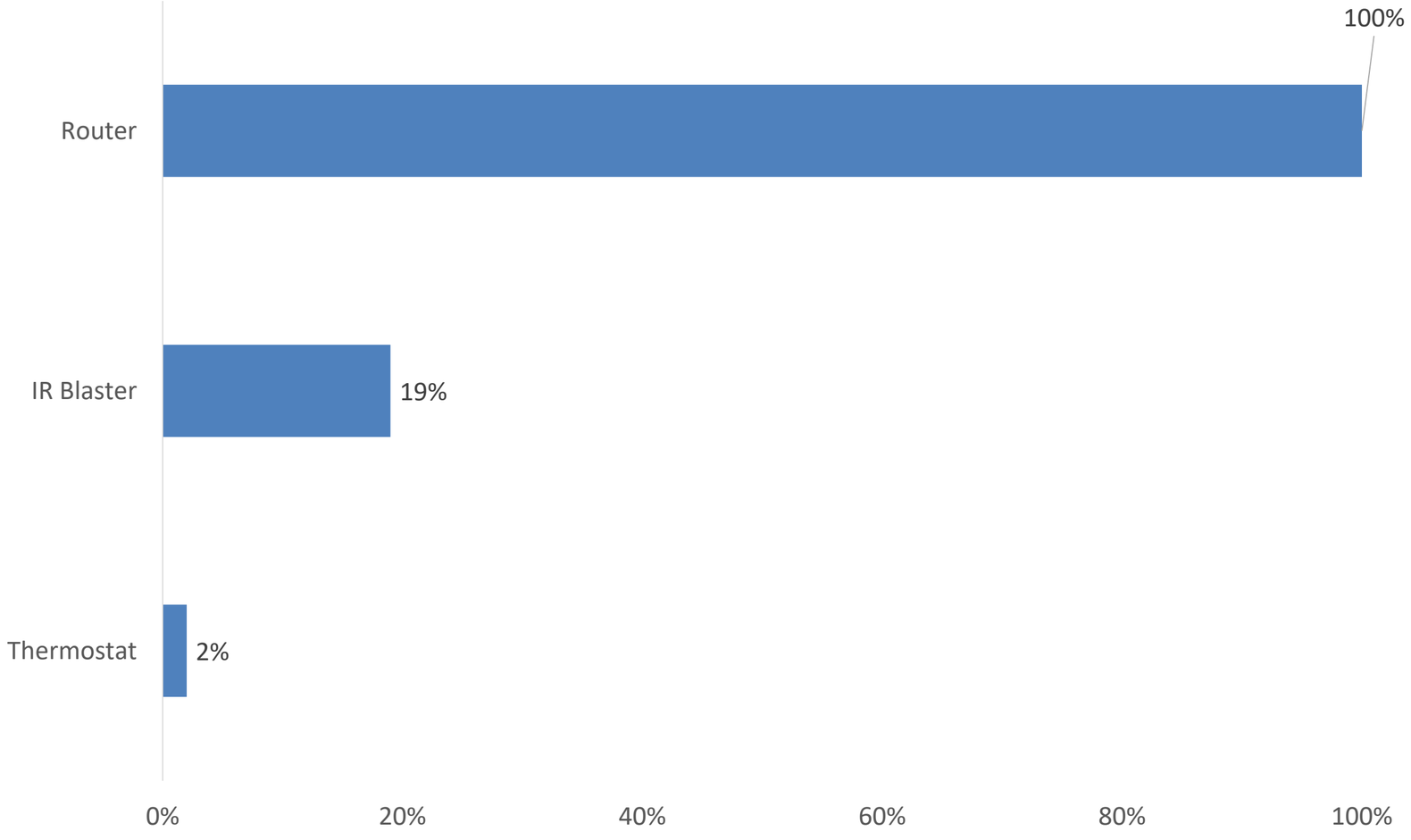
Router is the only default infra device every smart home uses to create a Wi-Fi zone for connecting multiple smart devices. Others are still in nascent stage.

Smart Home Infra



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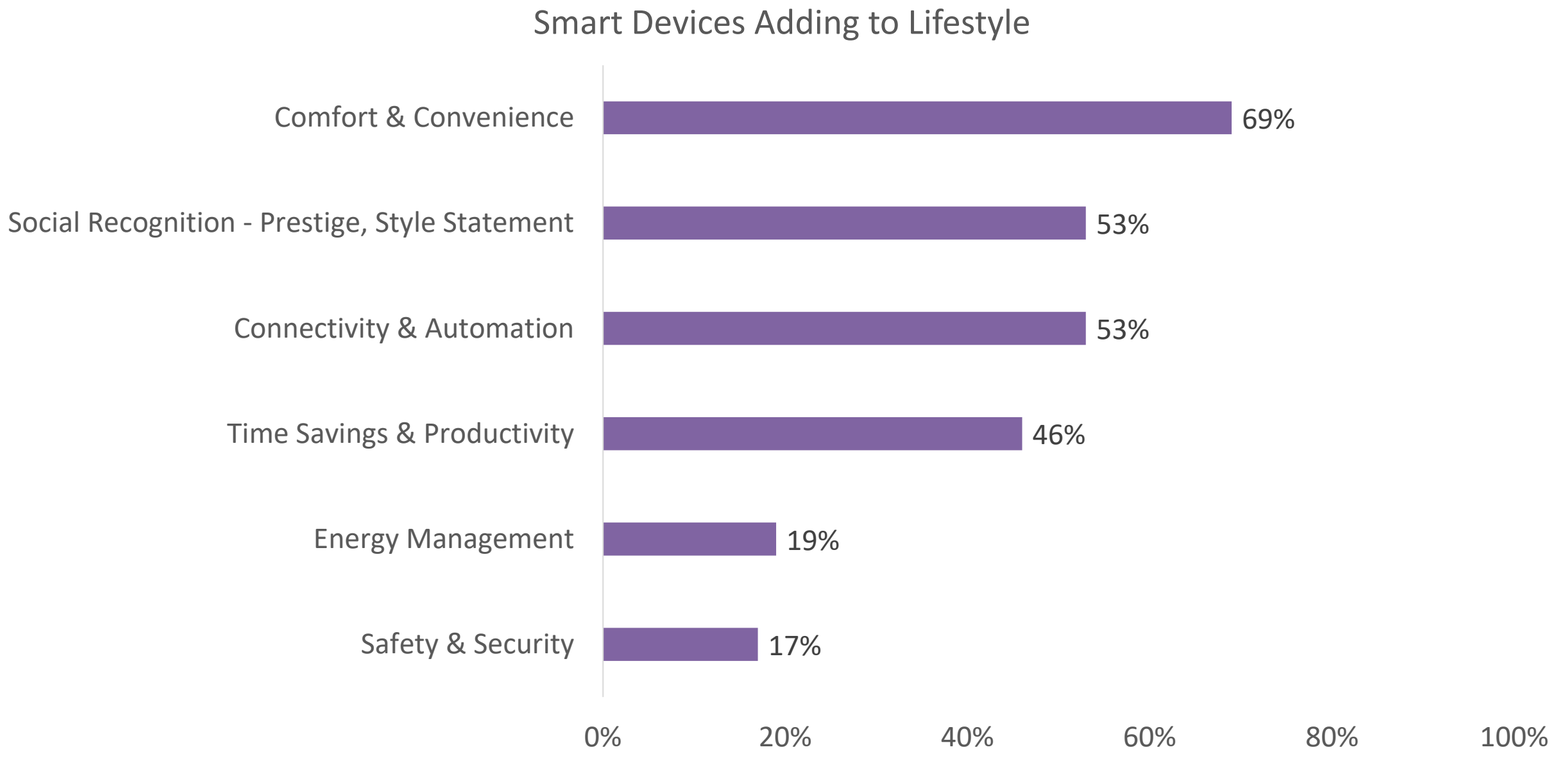
Consumers find smart devices defining their lifestyle. With a host of productivity to recognition factors, the recommendation of using smart devices is extremely high from existing smart device users.

Smart Devices are defining lifestyle



1	2	3	4	5	6	7	8	9	10
0%	0%	1%	3%	2%	7%	0%	0%	18%	69%

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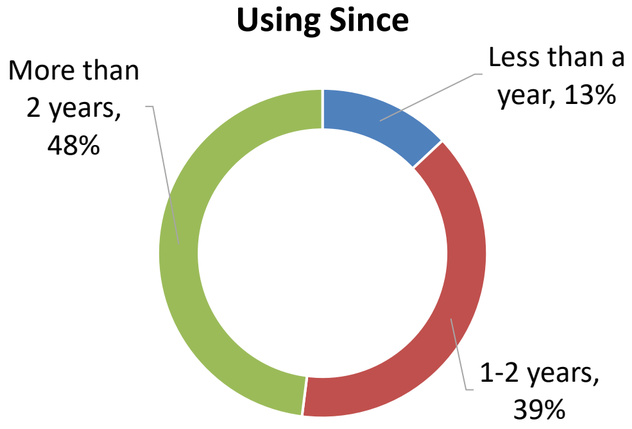
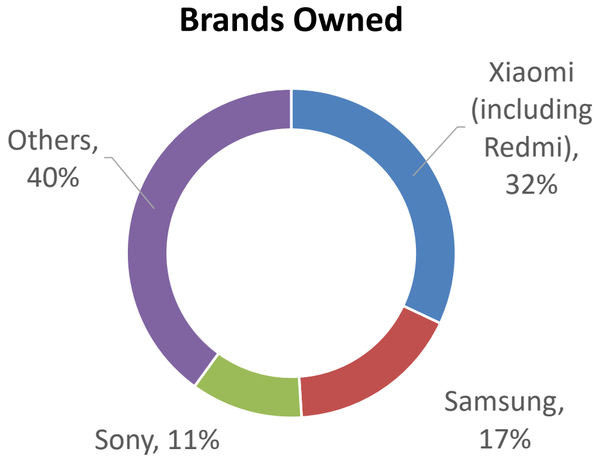
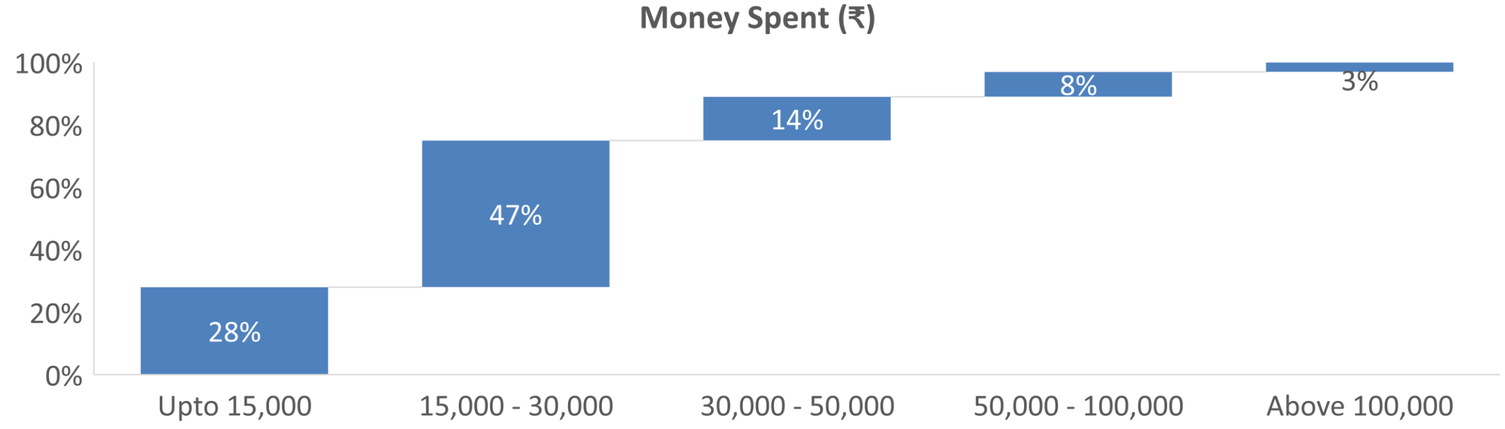
SMART TV

With affordability driving rapid adoption, Smart TVs are one of the smart devices that connected consumers are using for a while now.

Smart TV Adoption & Preferences







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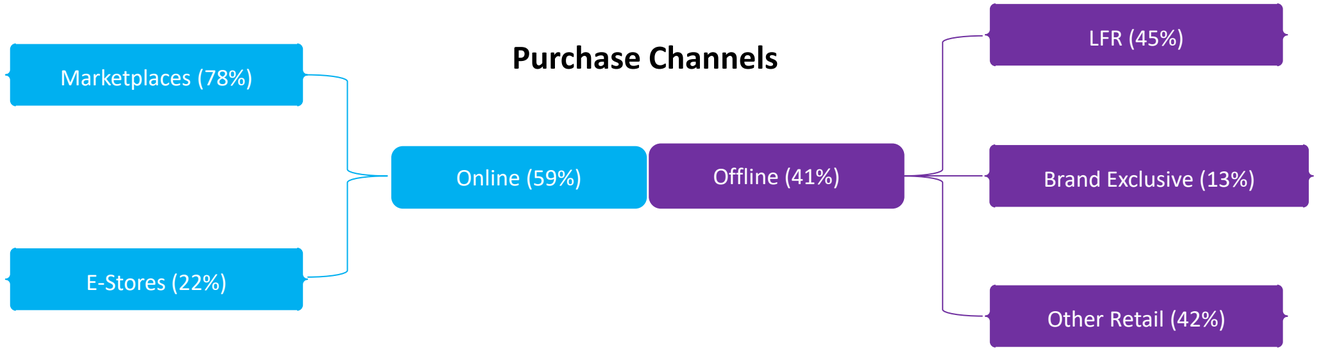
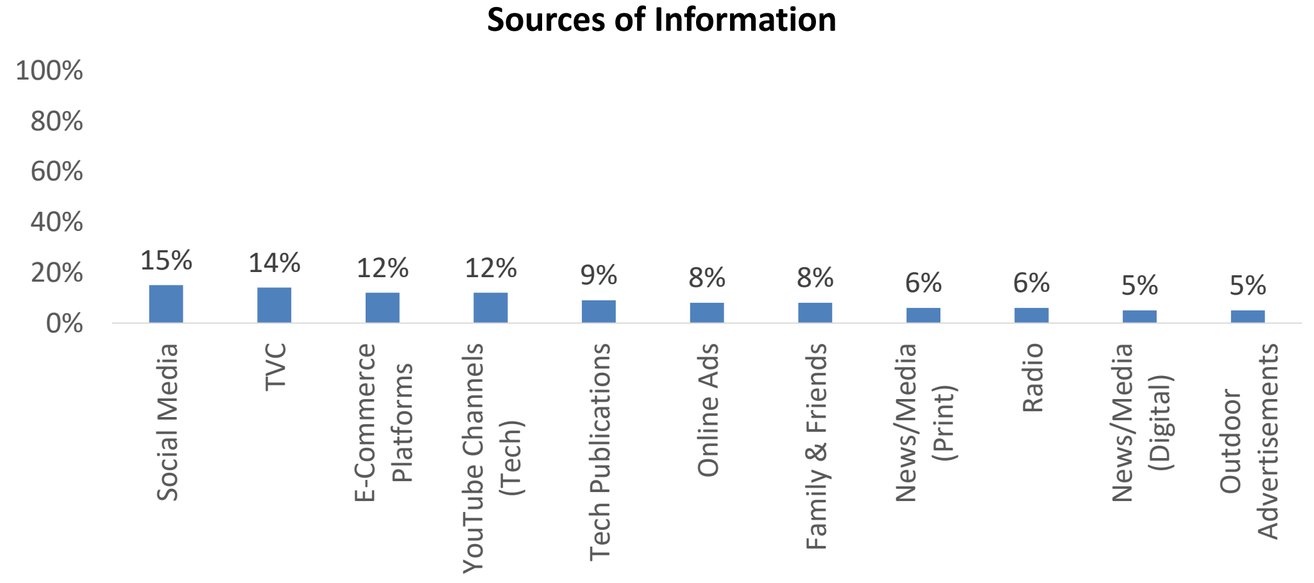
Digital is increasingly becoming preferred medium of acquiring more information about Smart TVs as well as making a purchase by connected consumers.

Buying and Information Sources





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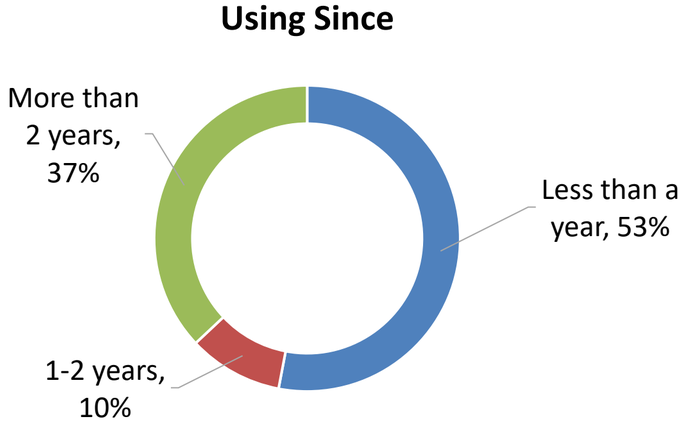
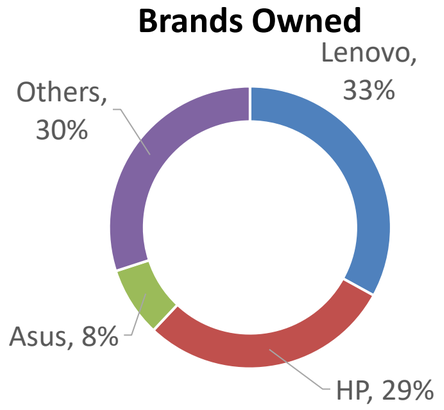
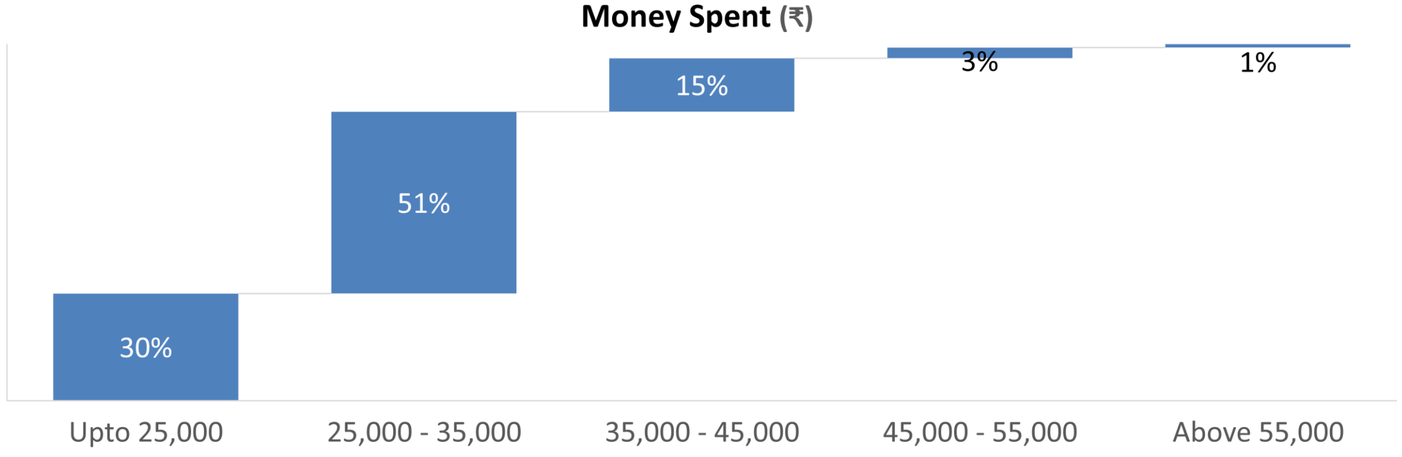
Chromebook

After an early attempt few years ago, Chromebook 2nd wave has started to pick up with consumers finding it as an affordable compute device especially for education purposes.

Chromebook Adoption & Preferences







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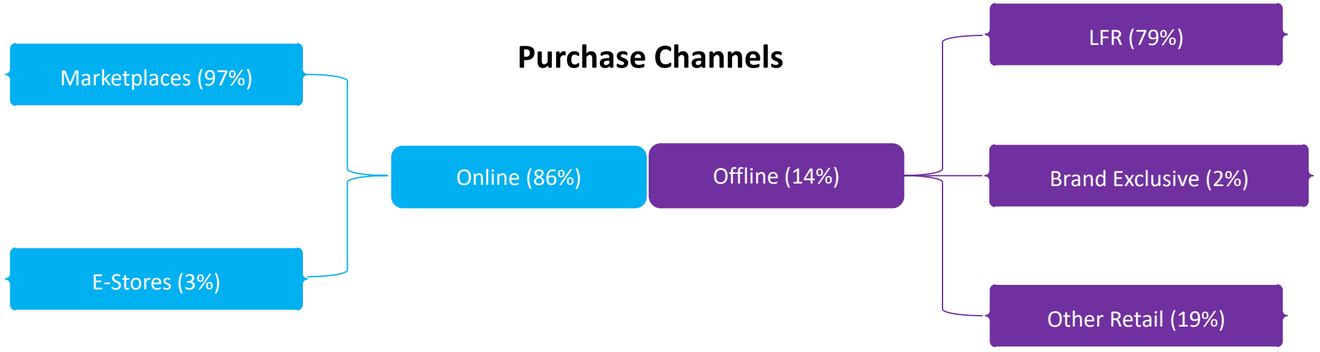
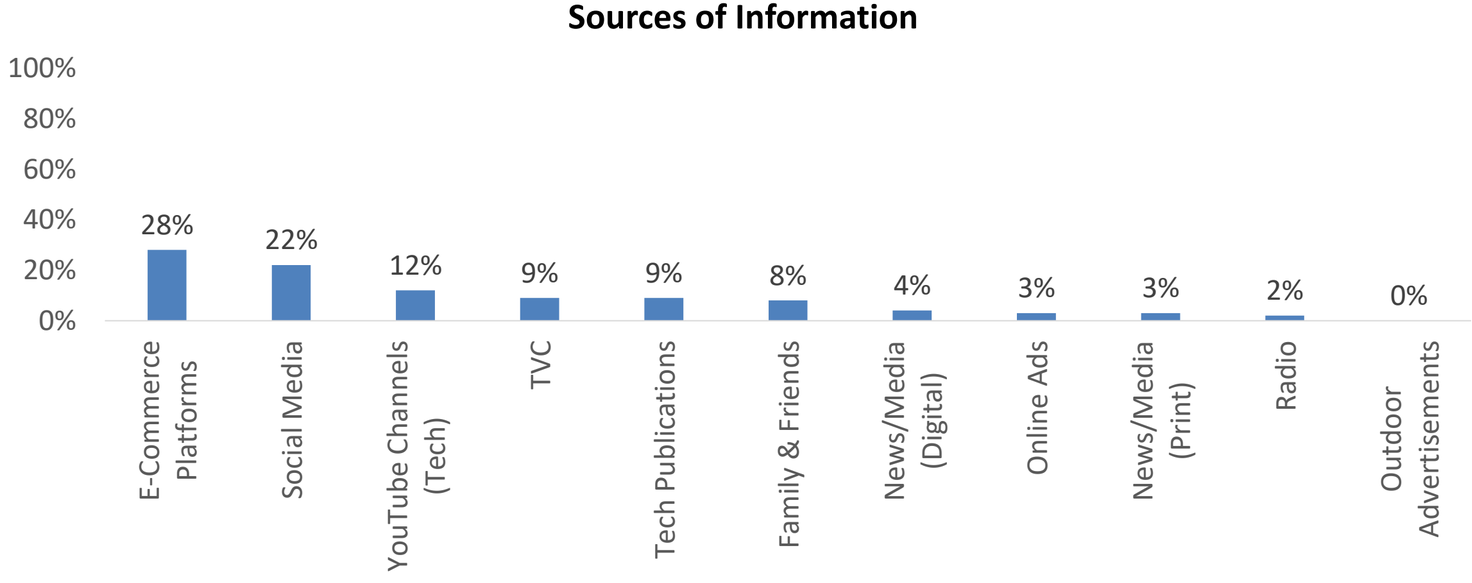
Following the other smart devices trend, Chromebooks are also discovered and purchased mainly through online mediums by consumers.

Buying & Information Sources





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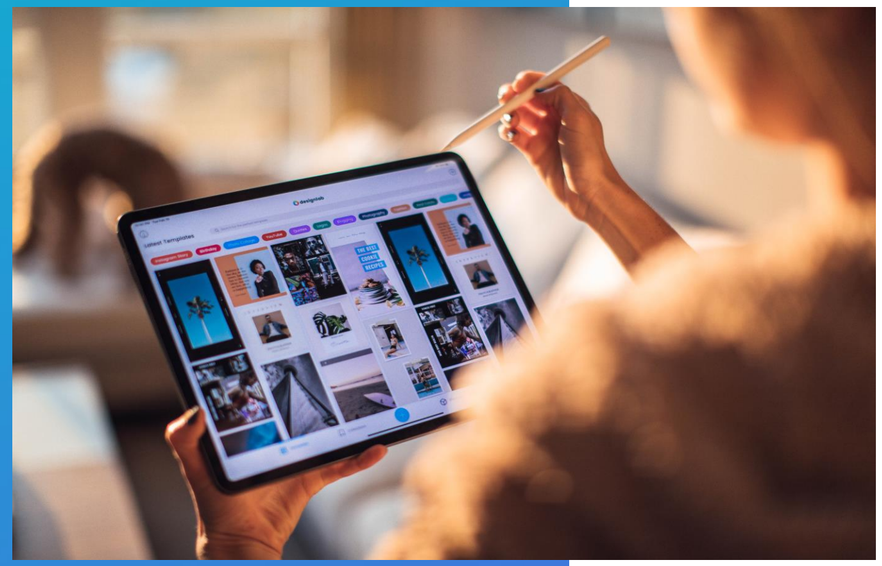
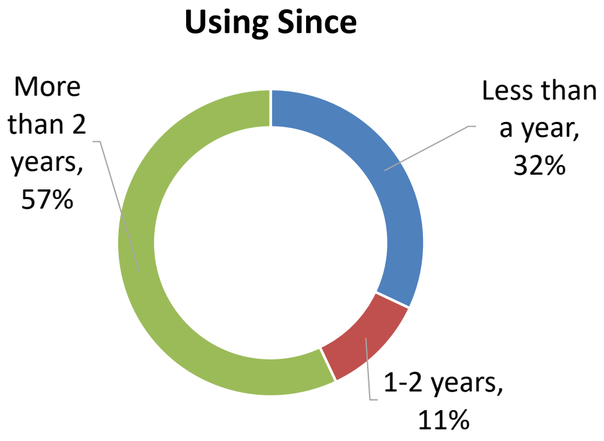
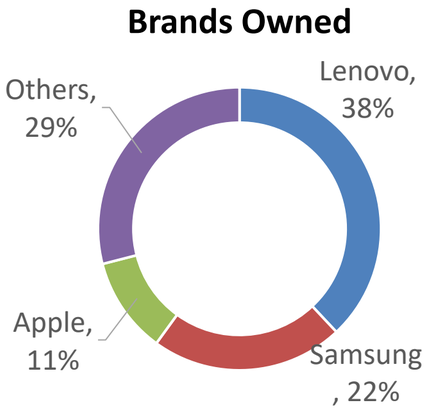


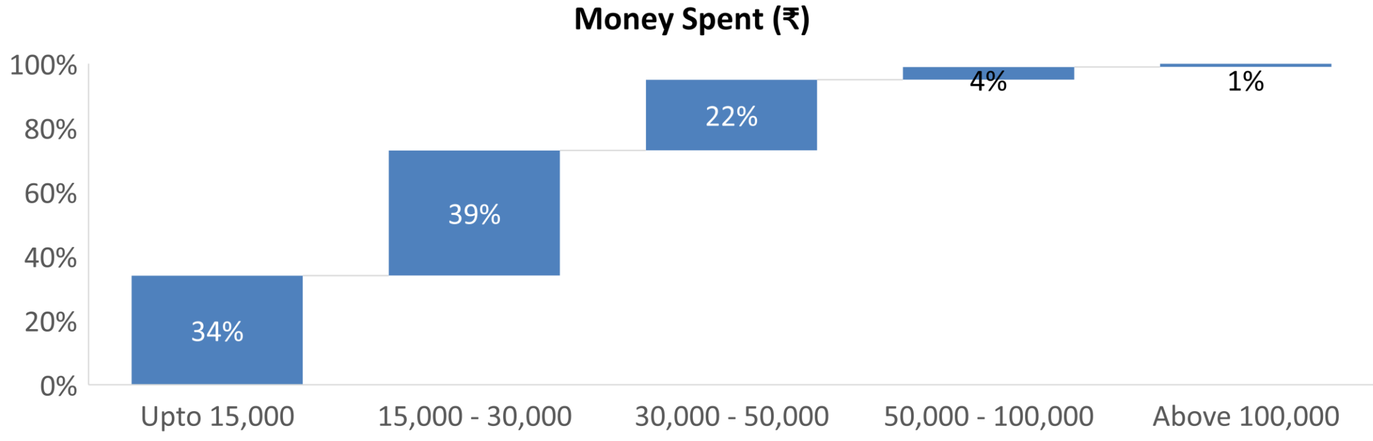
Tablet

Though Tablet did see a surge in demand, it continues to be seen as an addon 'vestigial' smart device in personal computing by consumers.

Tablet PC Adoption & Preferences







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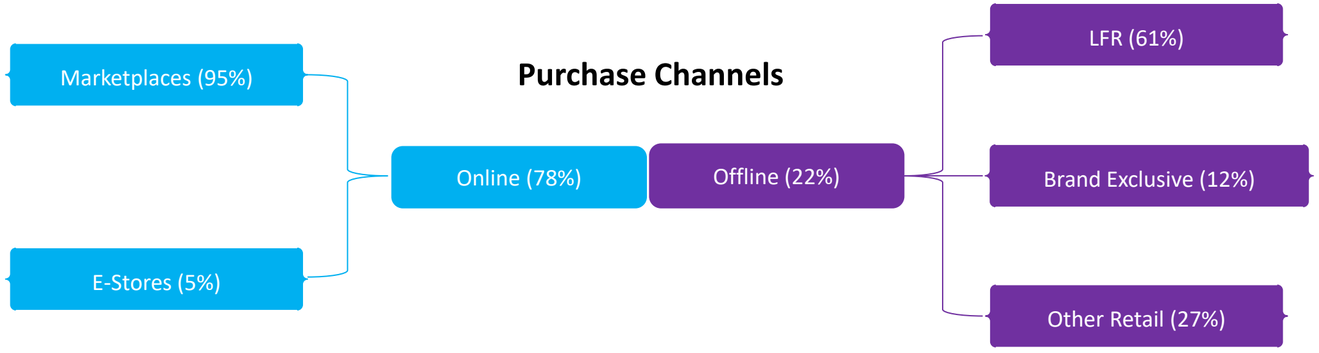
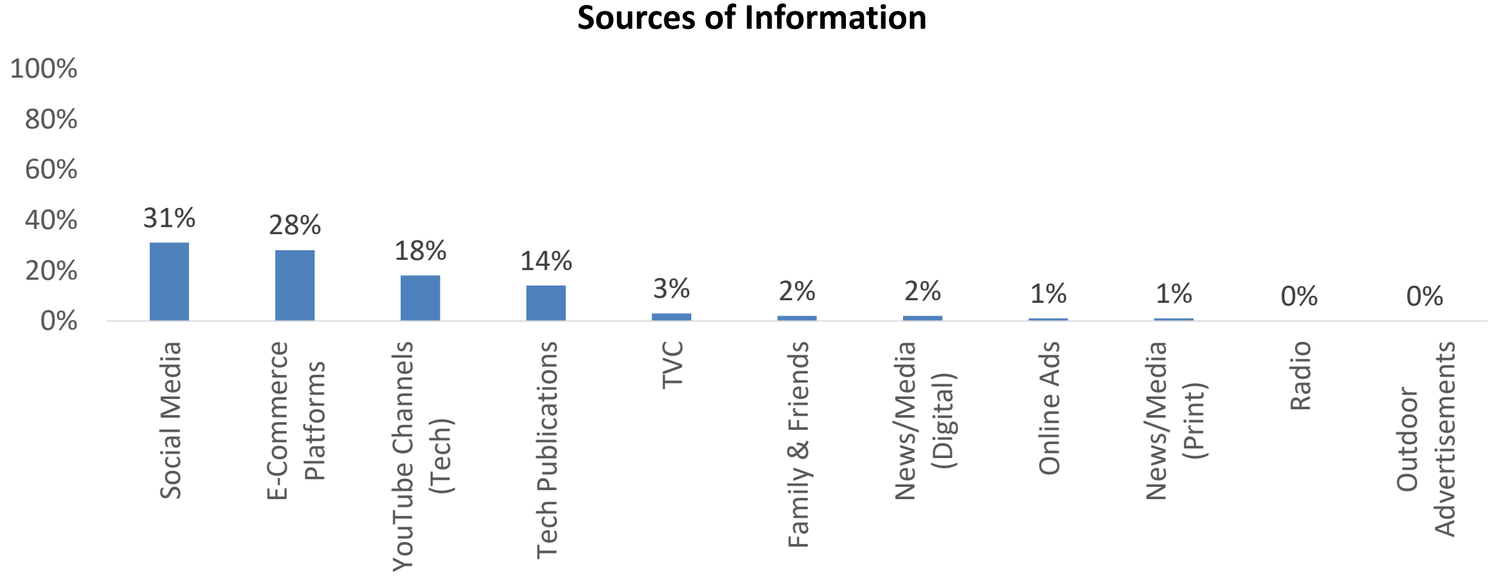
Very similar to other personal computing devices, Tablets, especially in affordability segment are purchased online. For acquiring information about Tablets digital mediums are preferred across segments.

Buying & Information Sources





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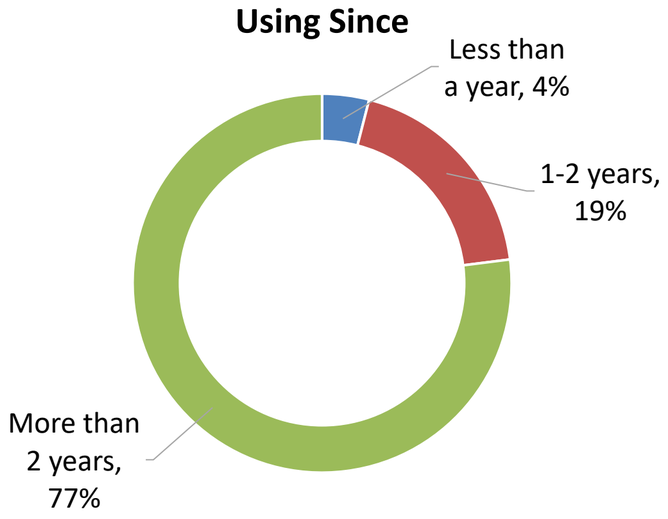
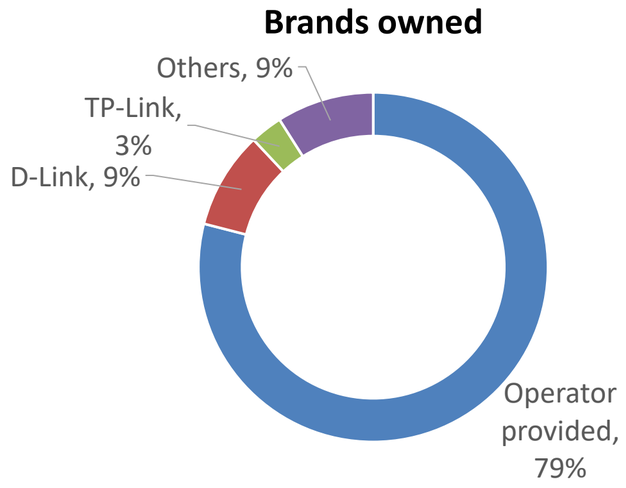
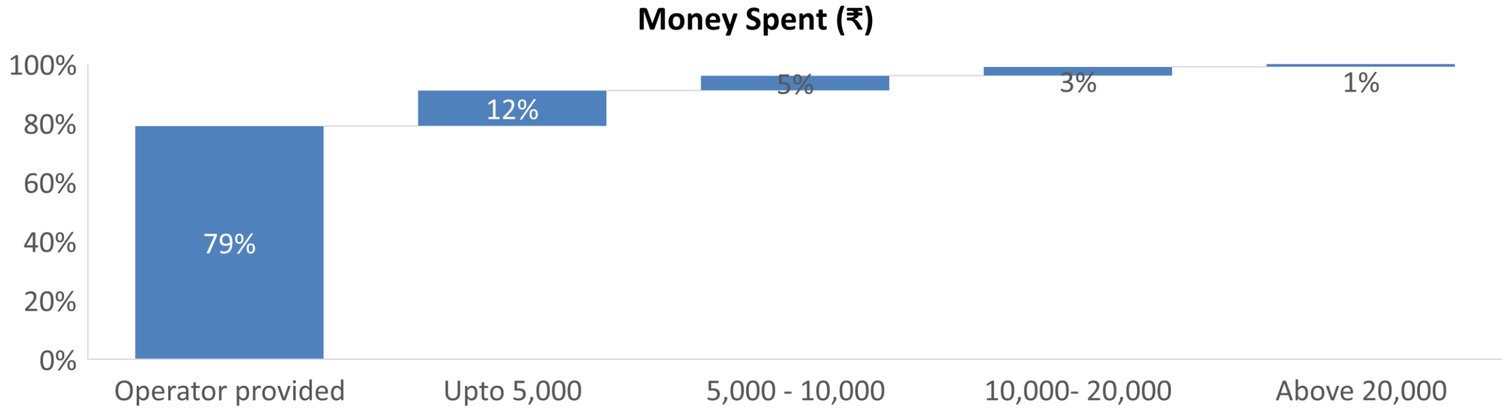
Routers

Routers have become the most critical digital infrastructure for connected consumers. The recent uptick in fibre connections has also led to router installation in homes.

Routers Adoption & Preferences







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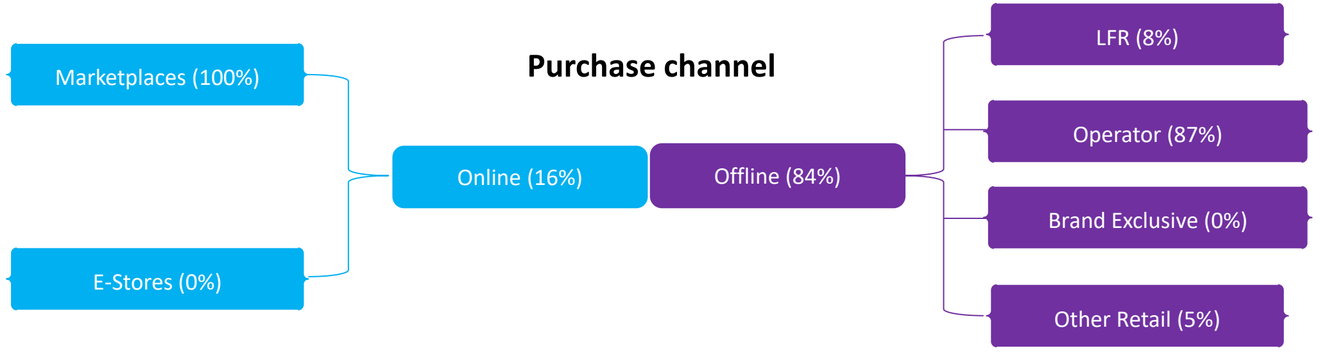
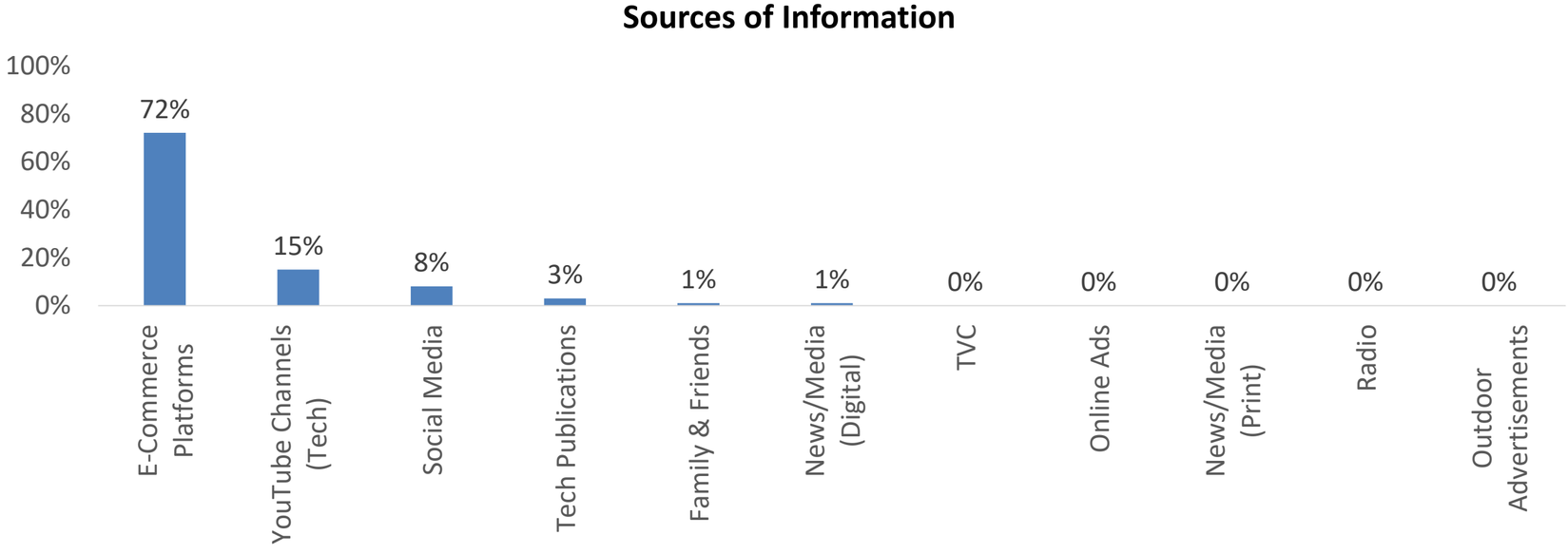
There is a very niche segment of consumers who purchase routers as most get them bundled with the telco offering connectivity. Ecommerce platforms are great source of information for connected consumers to learn about routers.

Buying & Information Sources





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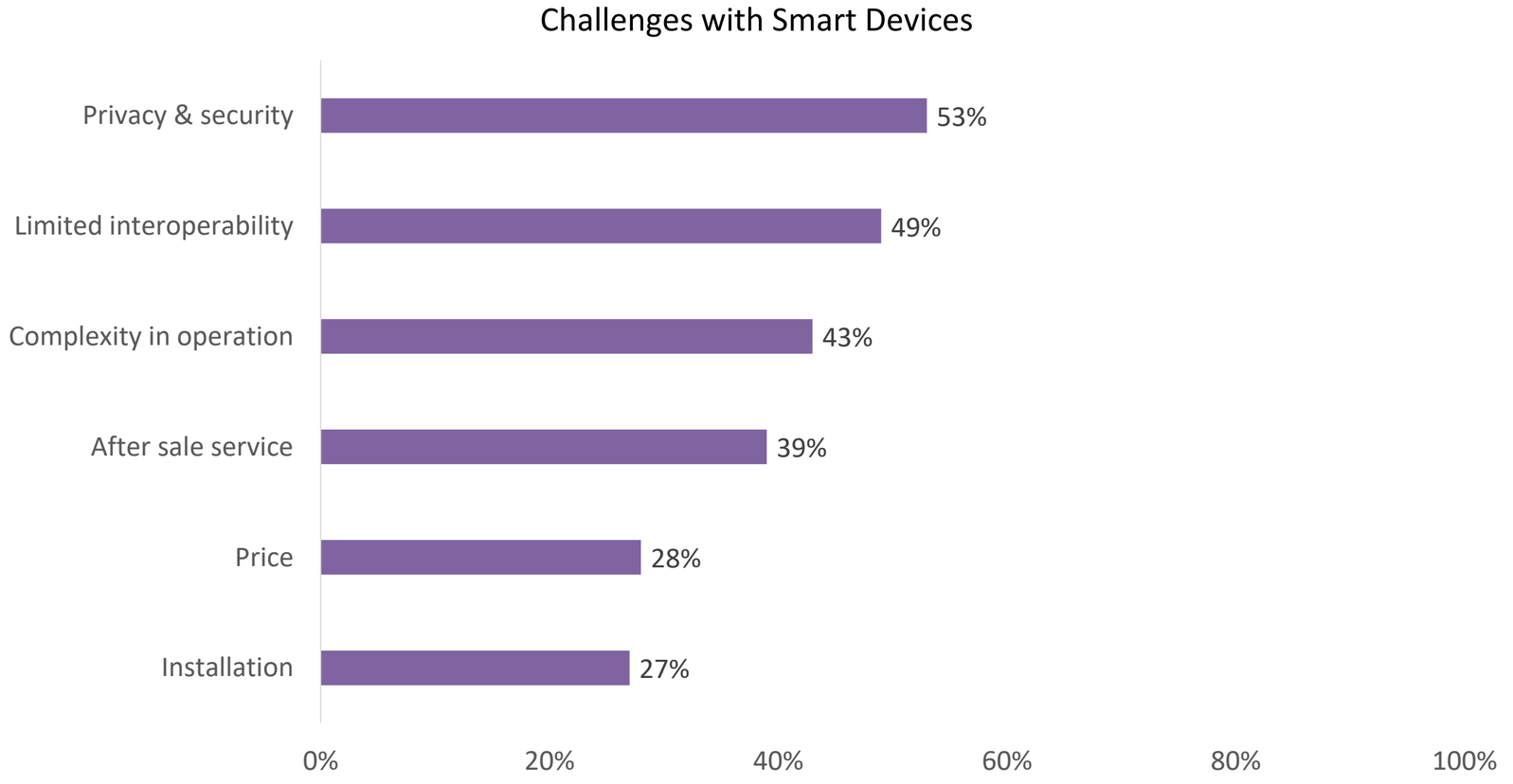
Despite challenges like concerns about privacy and security, the satisfaction quotient is high about smart devices among connected consumers.

Satisfaction & Challenges



Satisfaction	1	2	3	4	5
	3%	3%	29%	42%	23%

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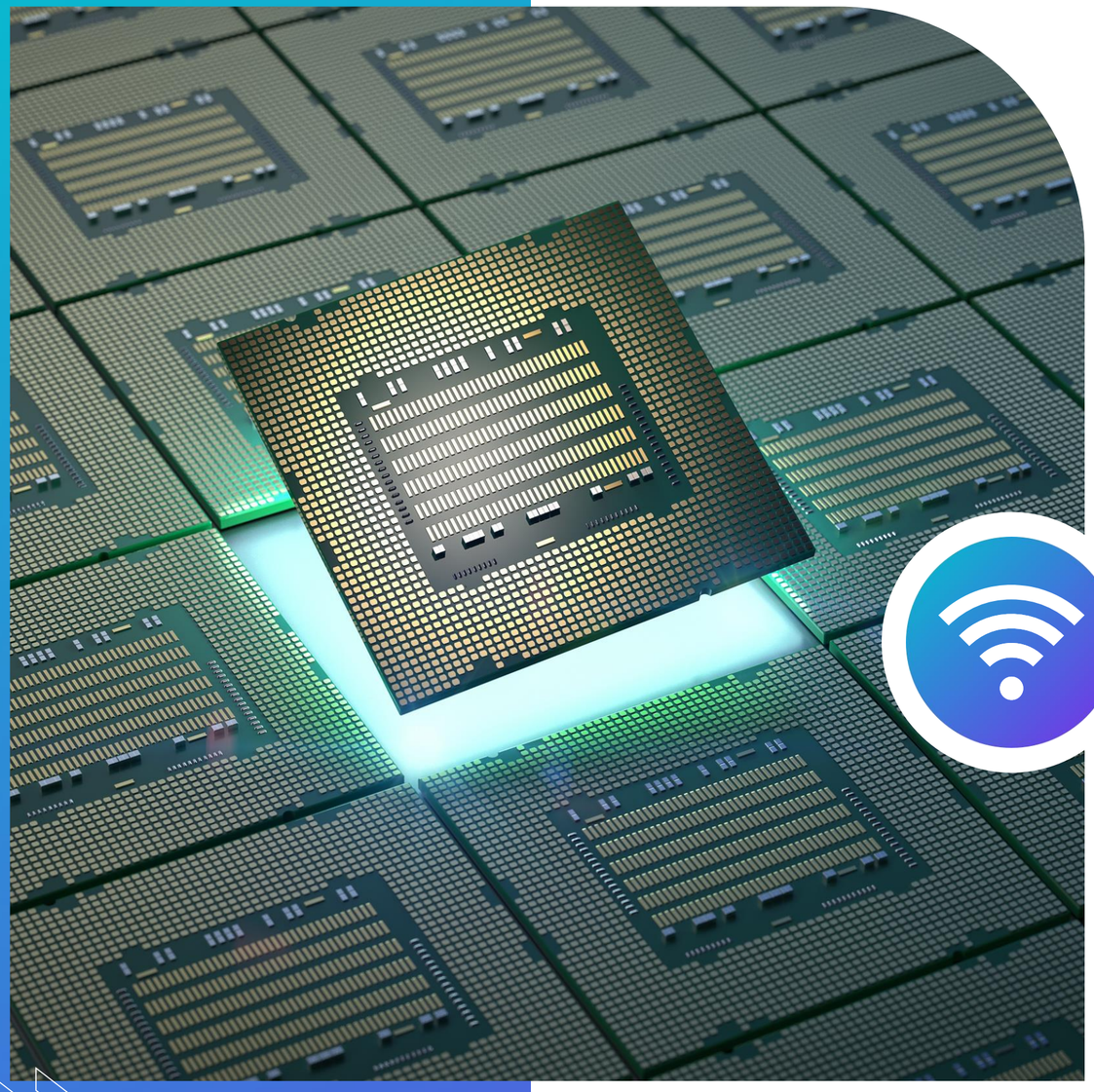
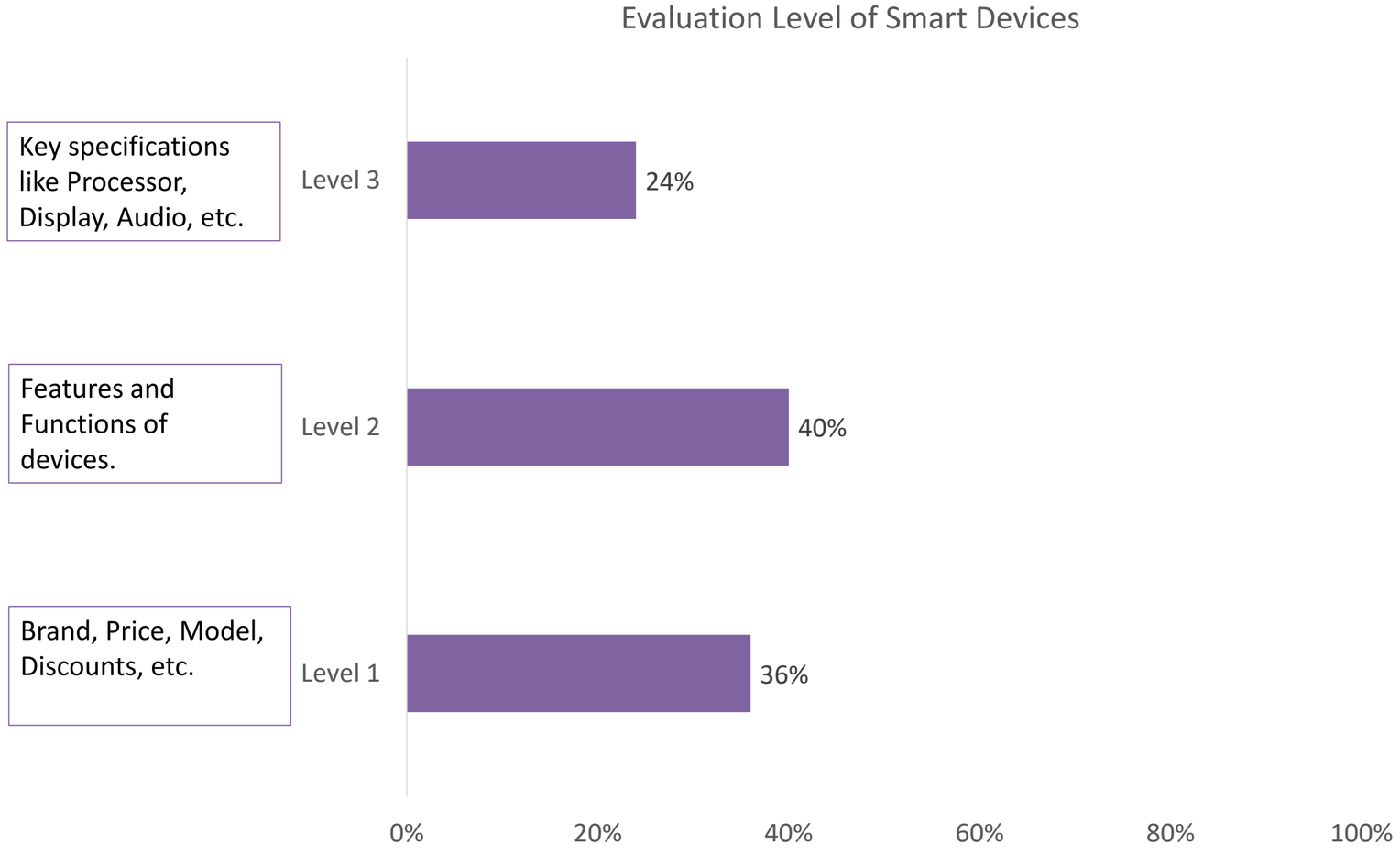


Chipset

Majority of connected consumers still deep dive to L-2 knowing more about features and functions. However, some consumers can be seen inquiring about processors, etc., investigating to L-3

How Connected Consumers Decide?



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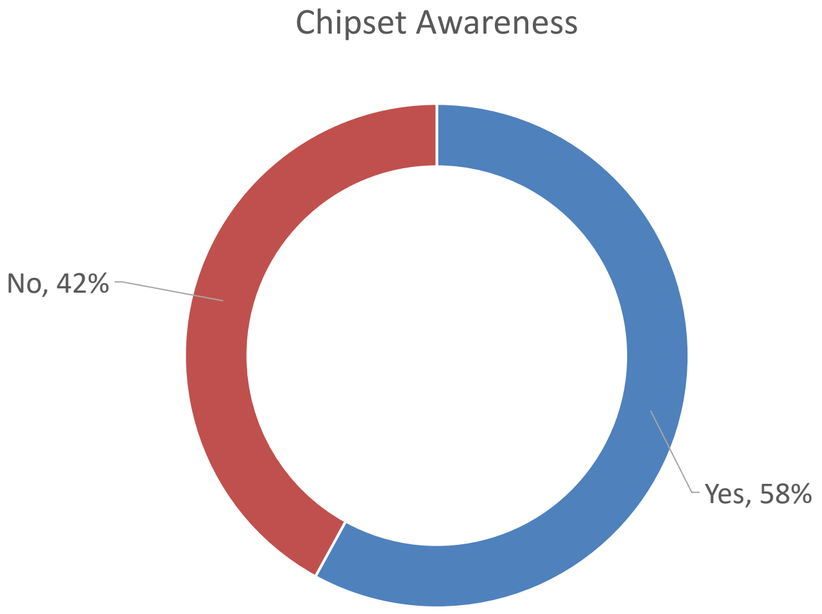
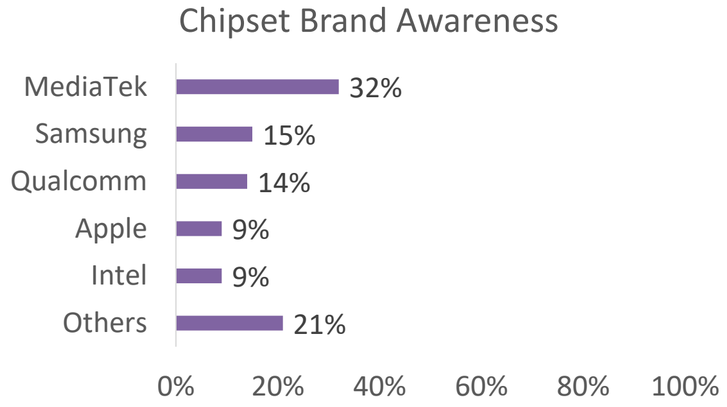
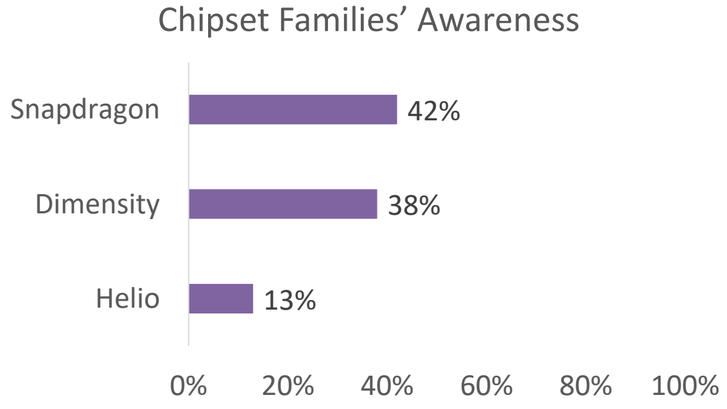
MediaTek emerges as the most known brand among connected consumers. Majority of the consumers also know about their device having a chipset.

Chipset Awareness







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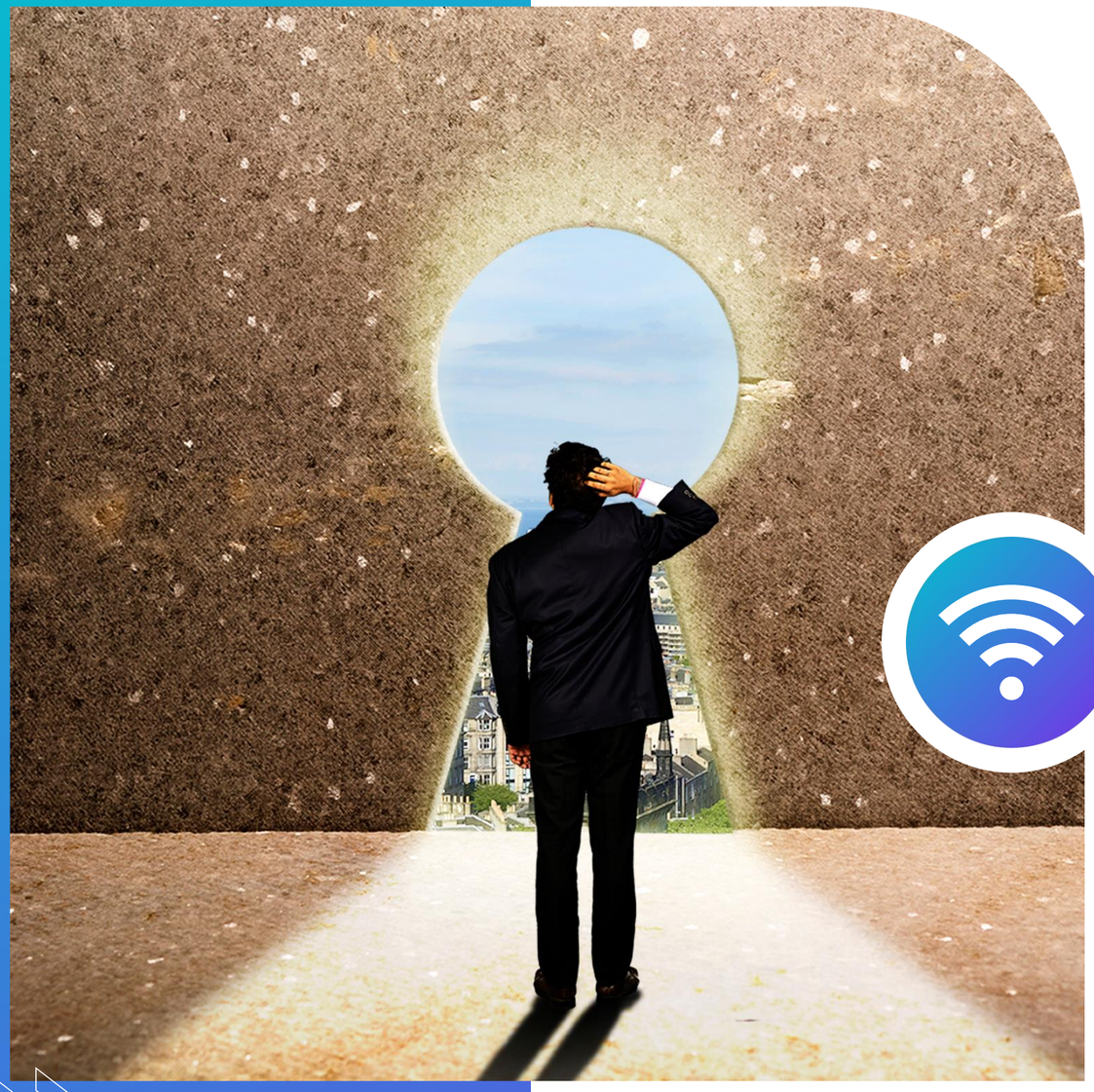
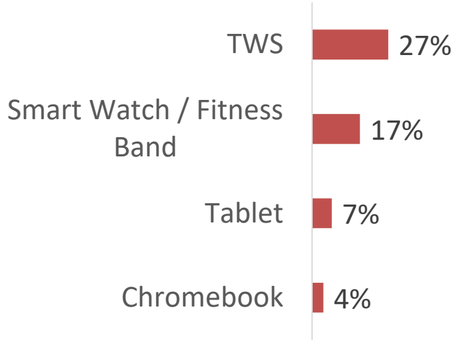
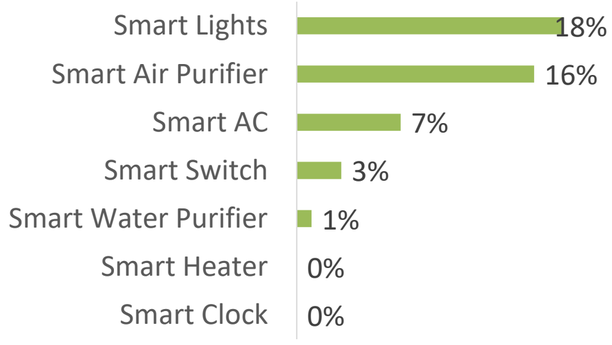


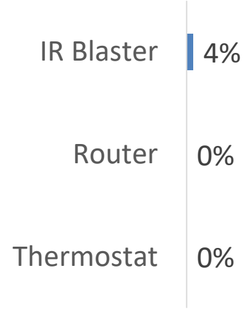
Future of Connected Consumers in India

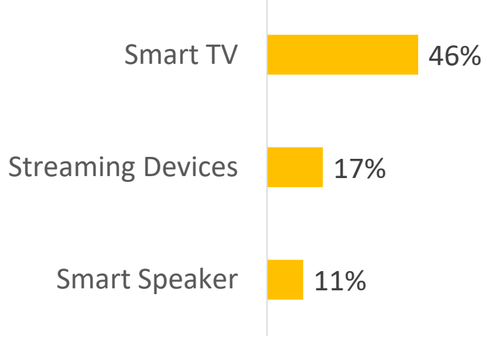
The promising future view of connected consumers suggests growth in all segments though the preferences and priorities remain more or less unchanged.

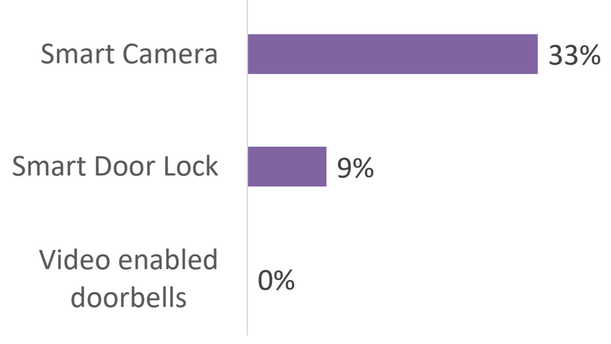
Future View of Connected Consumers in India

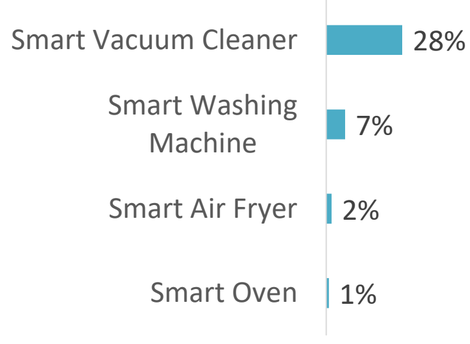












Smart Personal

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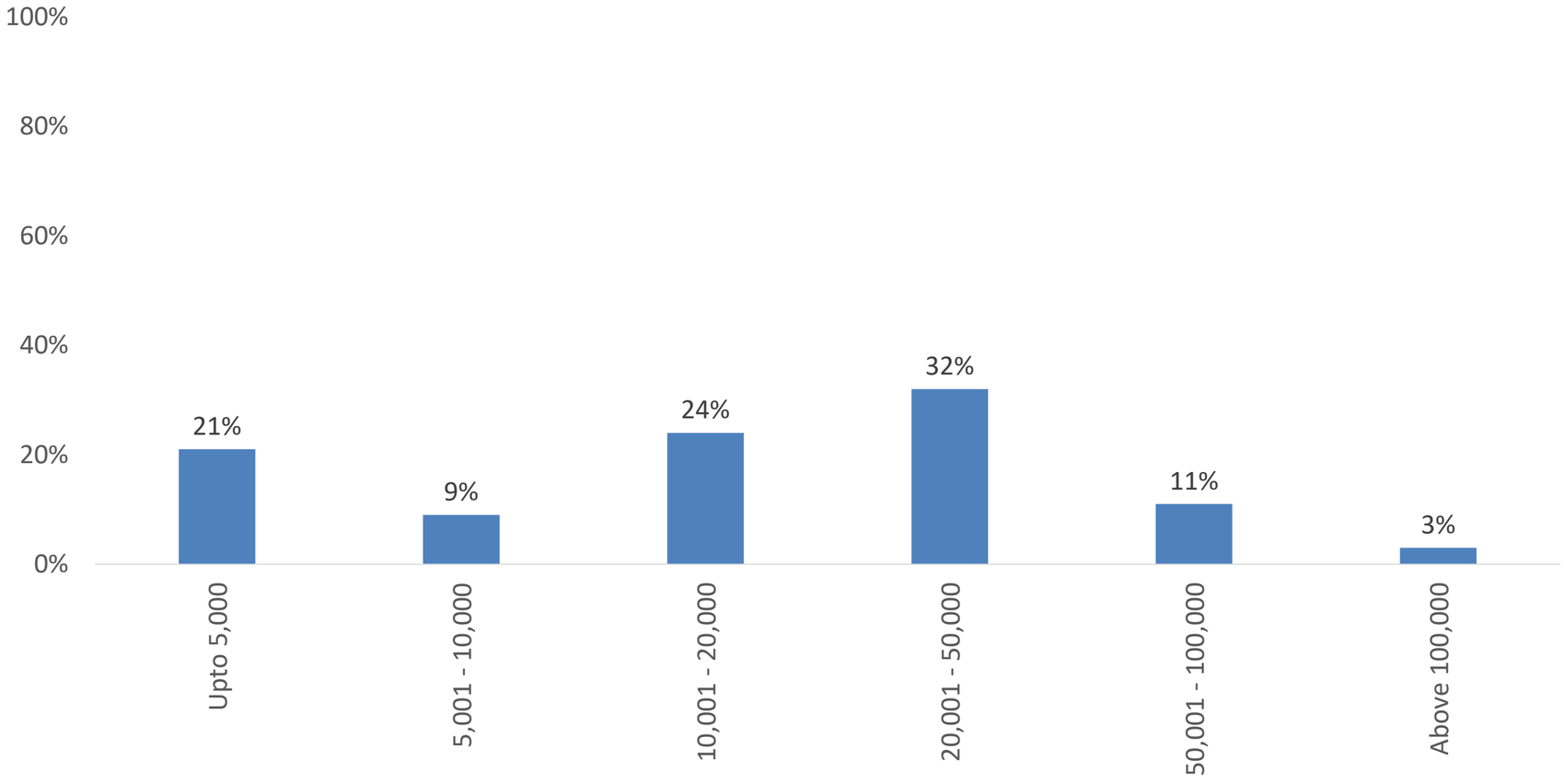
Future connected consumers will still be driven by affordability with 1 out of 3 looking to spend ₹20-50,000 on the smart devices basket.

The Sweet Spot



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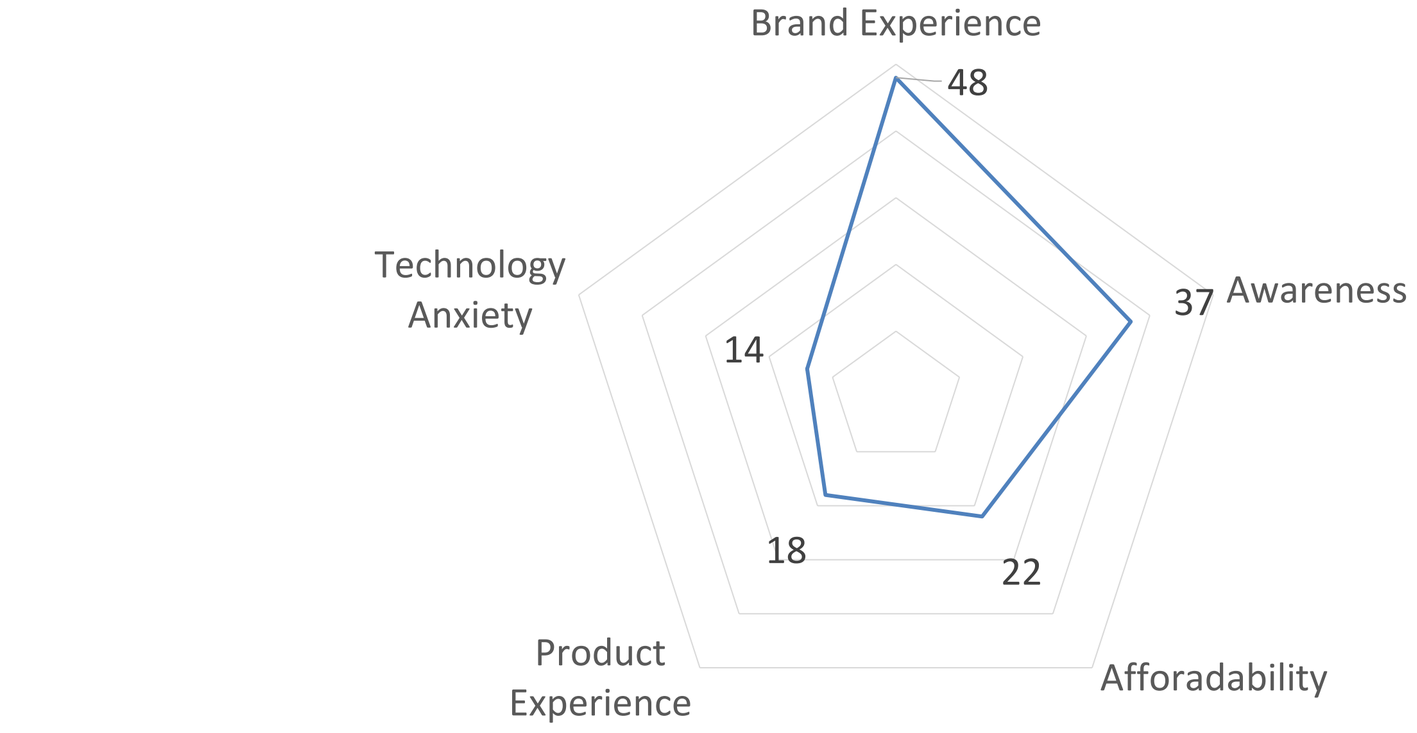
There are still some question marks that keep some on the edge. Brand experience and awareness still remains an impediment in more consumers getting connected.

On the Edge Consumers



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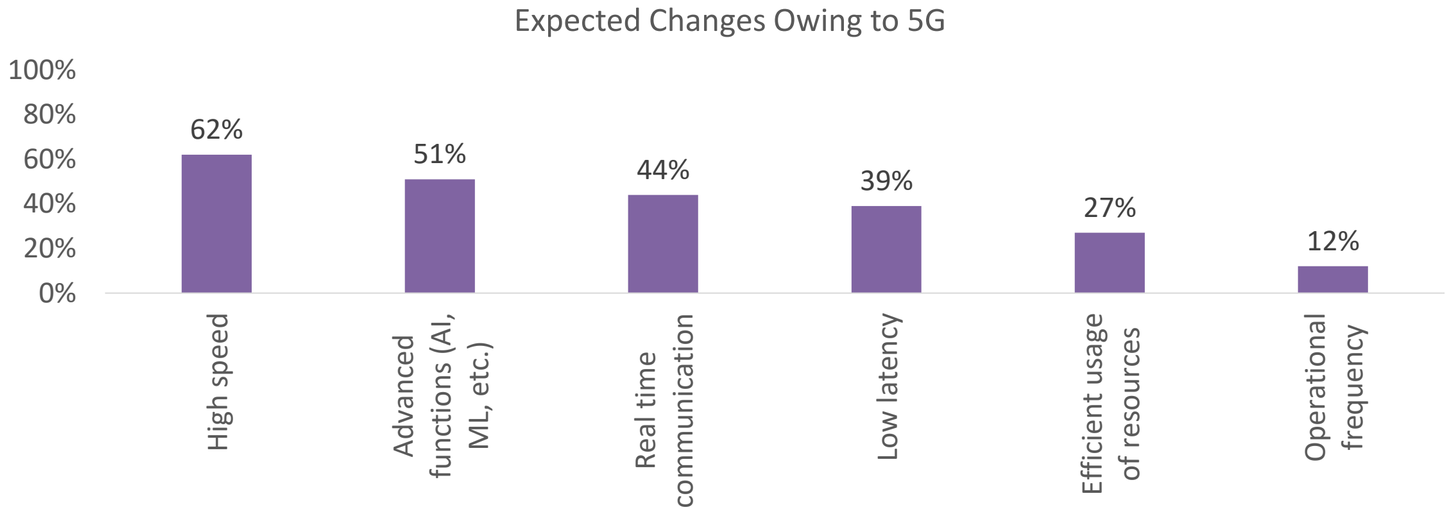
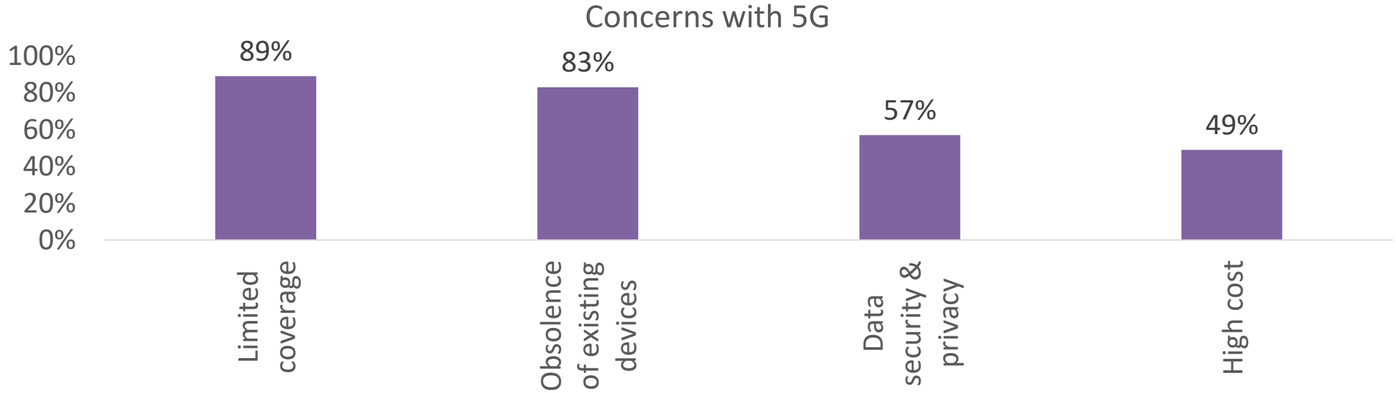
Advanced computational capabilities and higher speeds expected to among key 5G impact on connected consumers. However, this does come with some concerns.

5G & Connected Consumers





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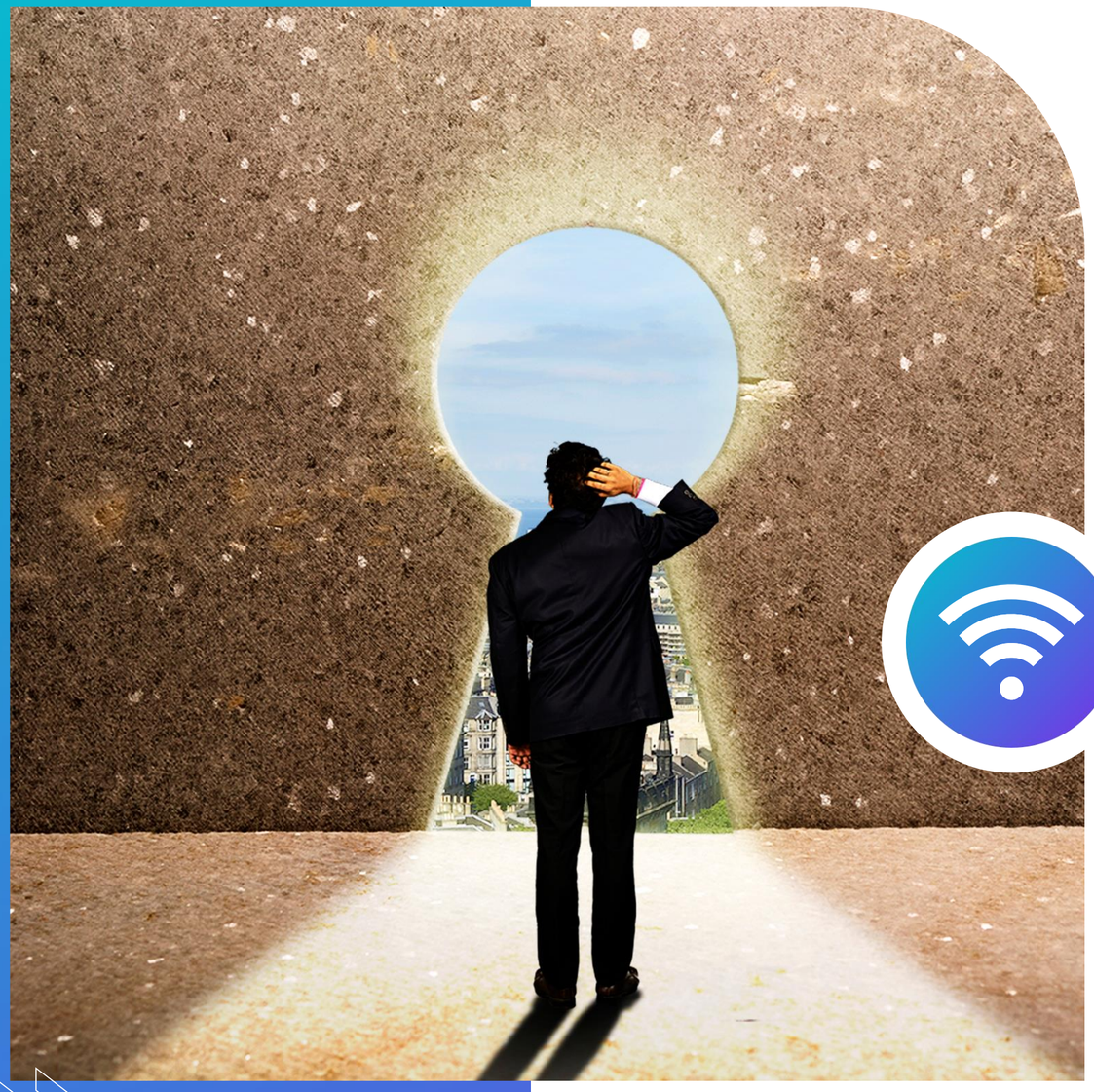
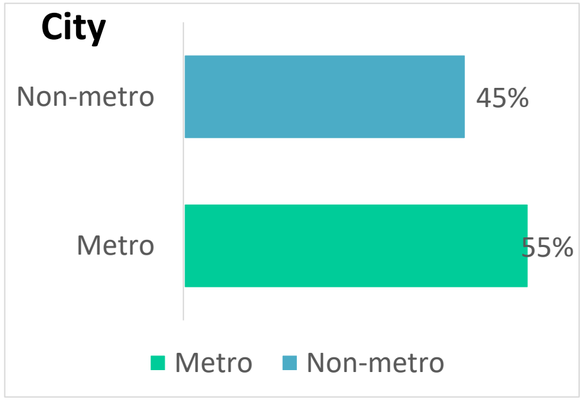
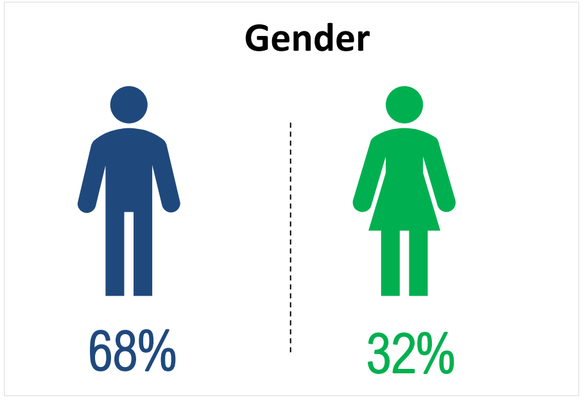
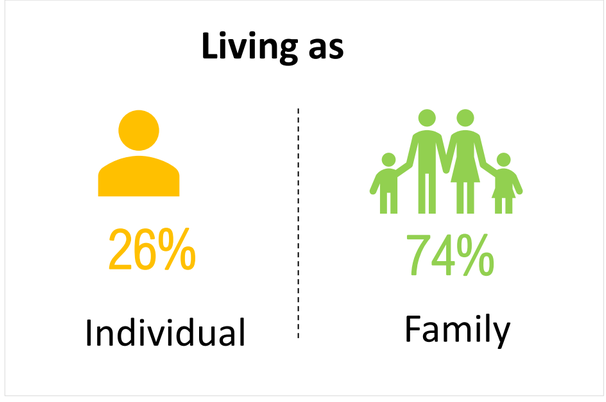


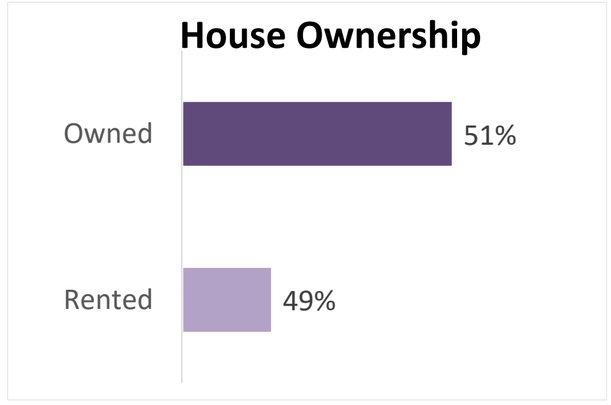
About the Study

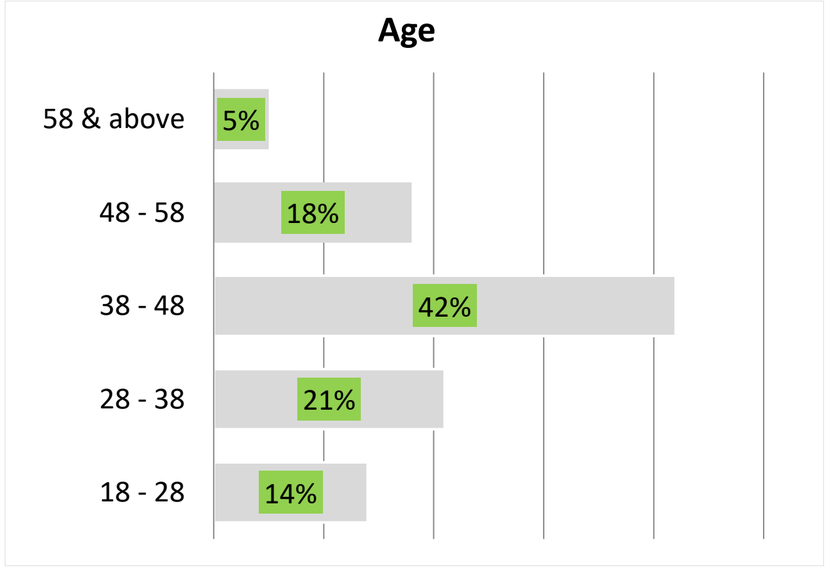
Respondents' Profile

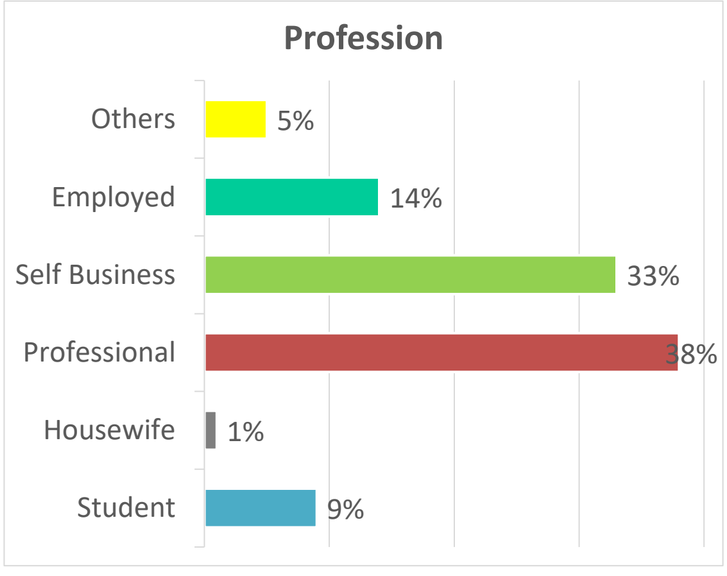


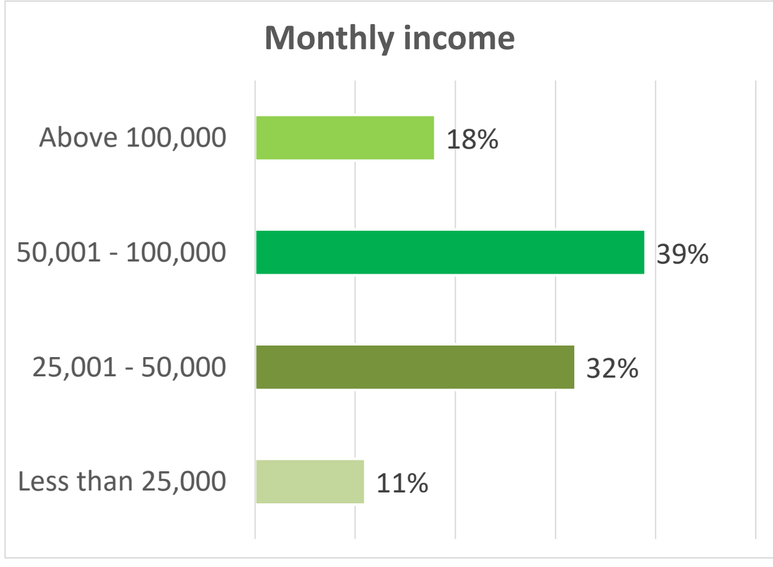












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Methodology & Sample

Quantitative
Structured
questionnaire

Online
administration

QC, data analysis
and insights

2500
Respondents

Connected Consumer 2000

Other Consumer 500

- Connected Consumer was defined as a consumer owning a smartphone and 3 other smart devices.
- Other consumers owned a smartphone but less than 3 other smart devices, or none of them.
- The findings may have a margin of error of +/-5% at 95% of confidence levels.

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THANK YOU!

For any queries regarding this report please write to research@techrac.net.
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