



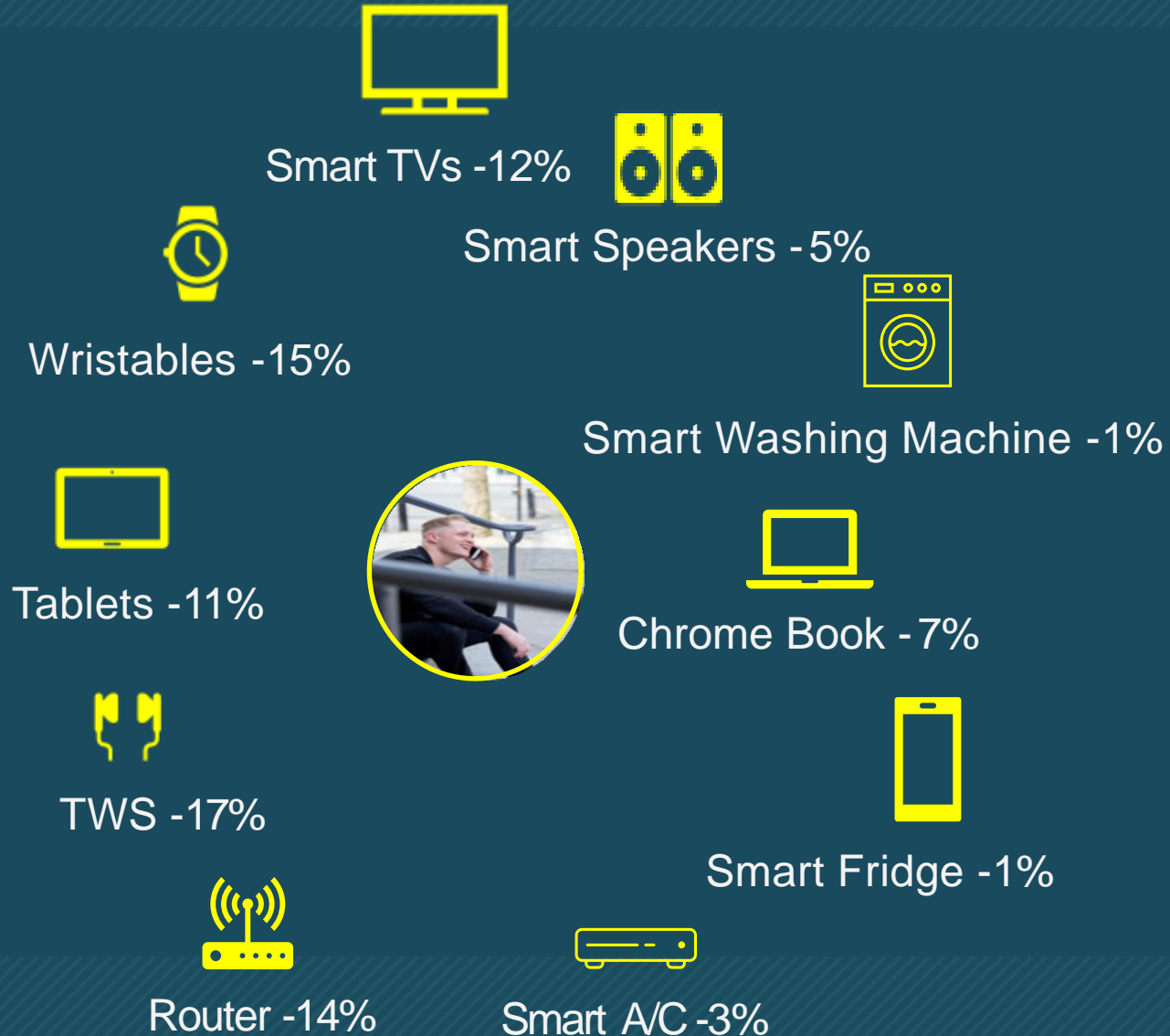
# The Connected Indian

2021 Report

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# The journey of Indian consumer getting connected is bolstering

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Smartphone users are now taking 'smartisation' beyond their individual wearable gadgets.

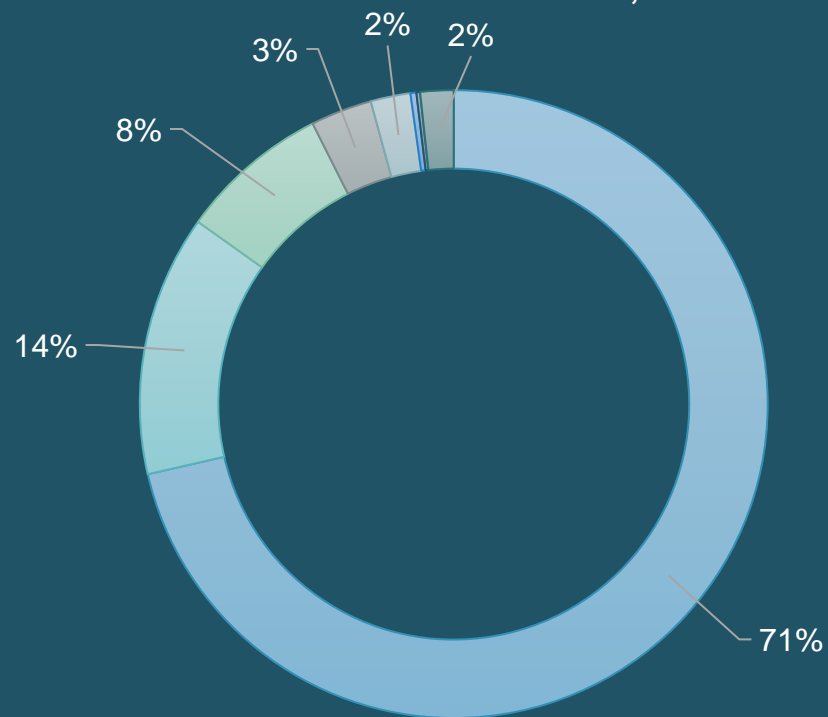
Covid-19 pandemic has led to automation and digital transformation of homes and workplaces, which has pushed uptake of smart appliances and devices at group level – home as well as office.

The wired broadband growth led by fibre rollout has allowed homes to go for automation by installing connected devices. As of September 2021, India had 23.13 million wireline subscribers registering a 15% increase compared to previous year subscribers.

# This is growing the revenue pie!

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Revenue Contribution, 2021



Smartphones Laptops Smart TVs Tablets  
Smart Wearables Smart Speaker Streaming devices Others

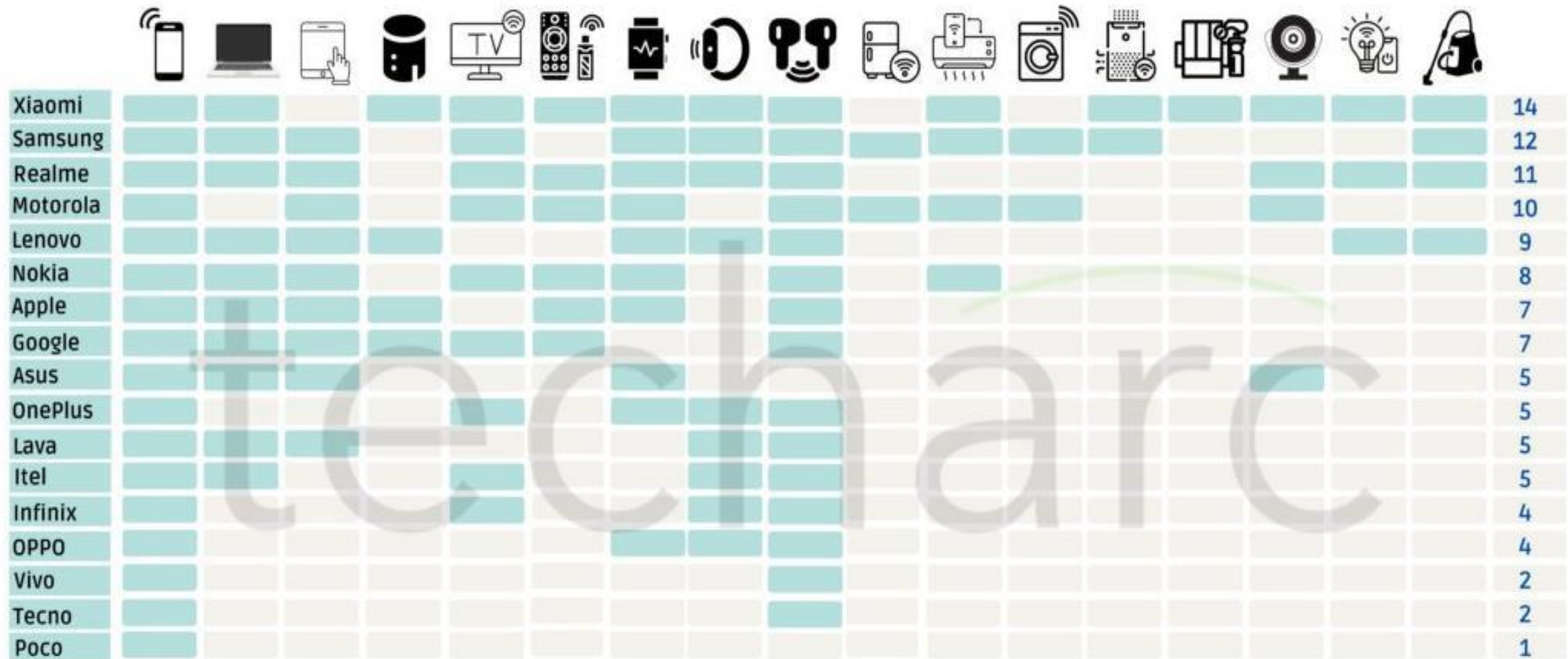
The connected devices market is expected to grow 5.8% by value in calendar year 2021, over previous year.

The market is likely to fetch ₹ 312, 689 crore of revenues by the end of December 2021.

Though the majority contributor continues to be smartphones, other opportunities are growing fast due to rapid tech lifestyle transformation by users at individual as well as group levels.

# The Smartphone brands are becoming Smartphone<sup>+</sup> brands

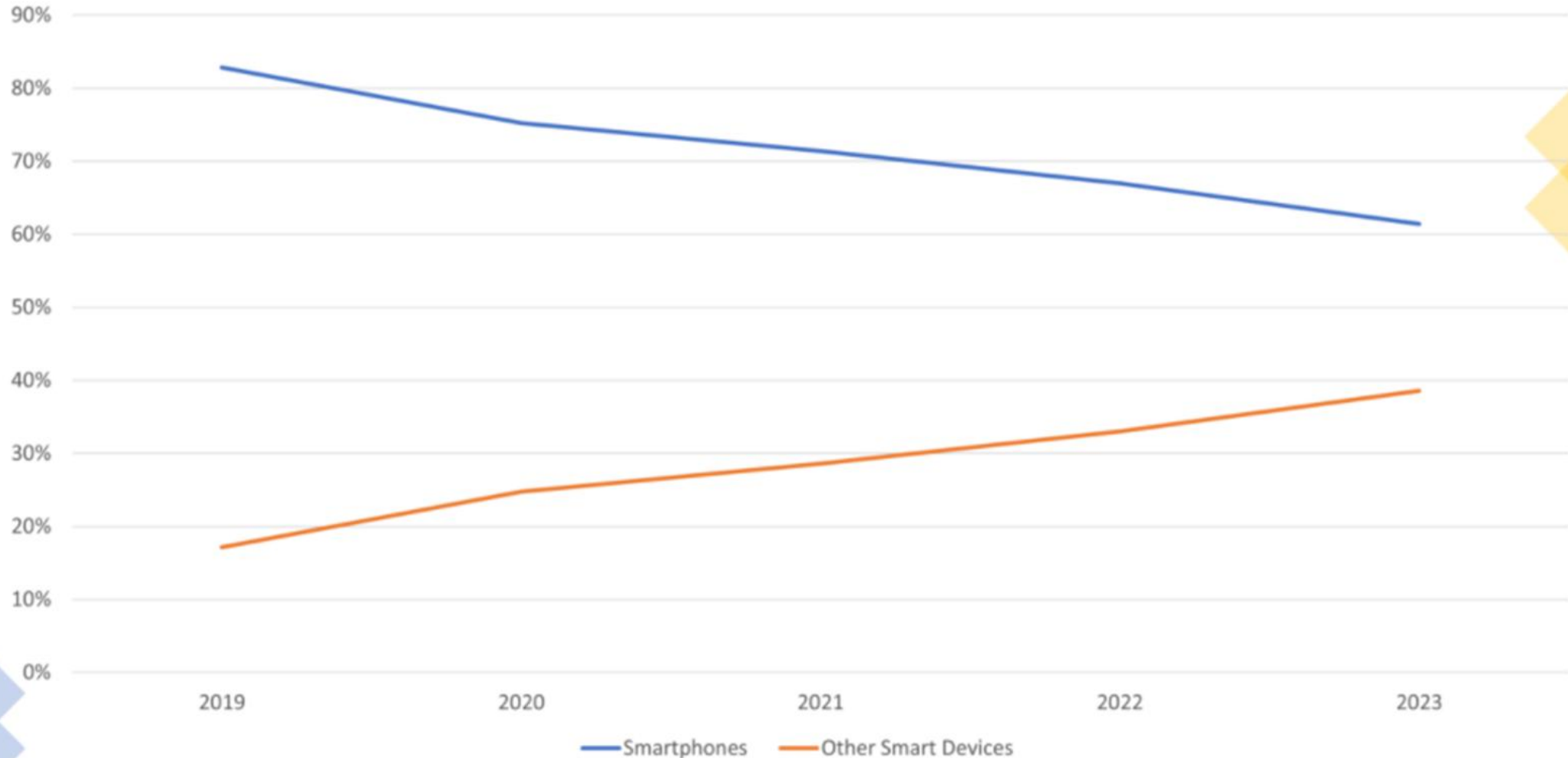
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Smart Tech-Style Spread of Smartphone OEMs in India

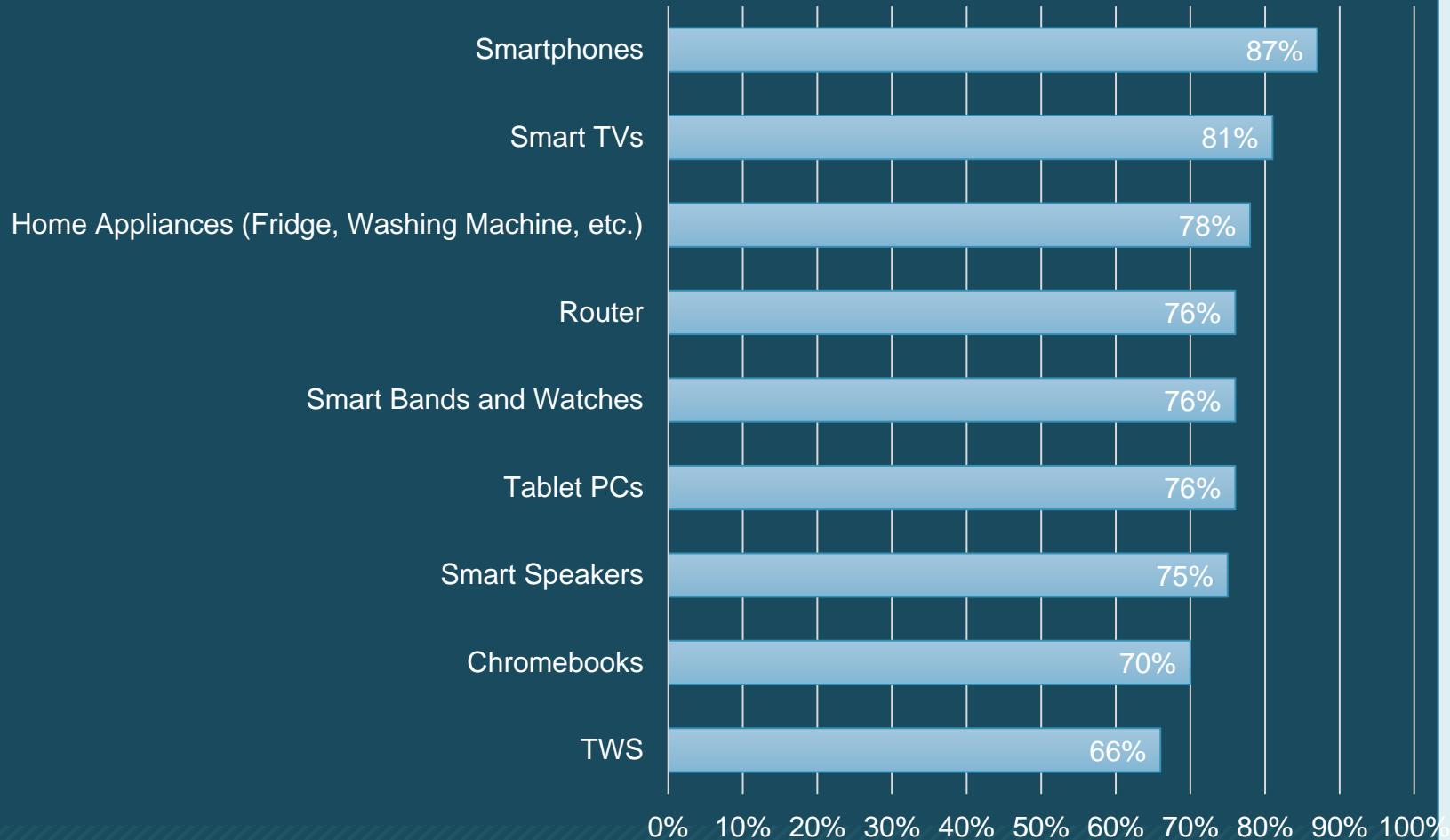
# The diversification of revenues is happening and growing

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# How consumers rate smart devices on experience?

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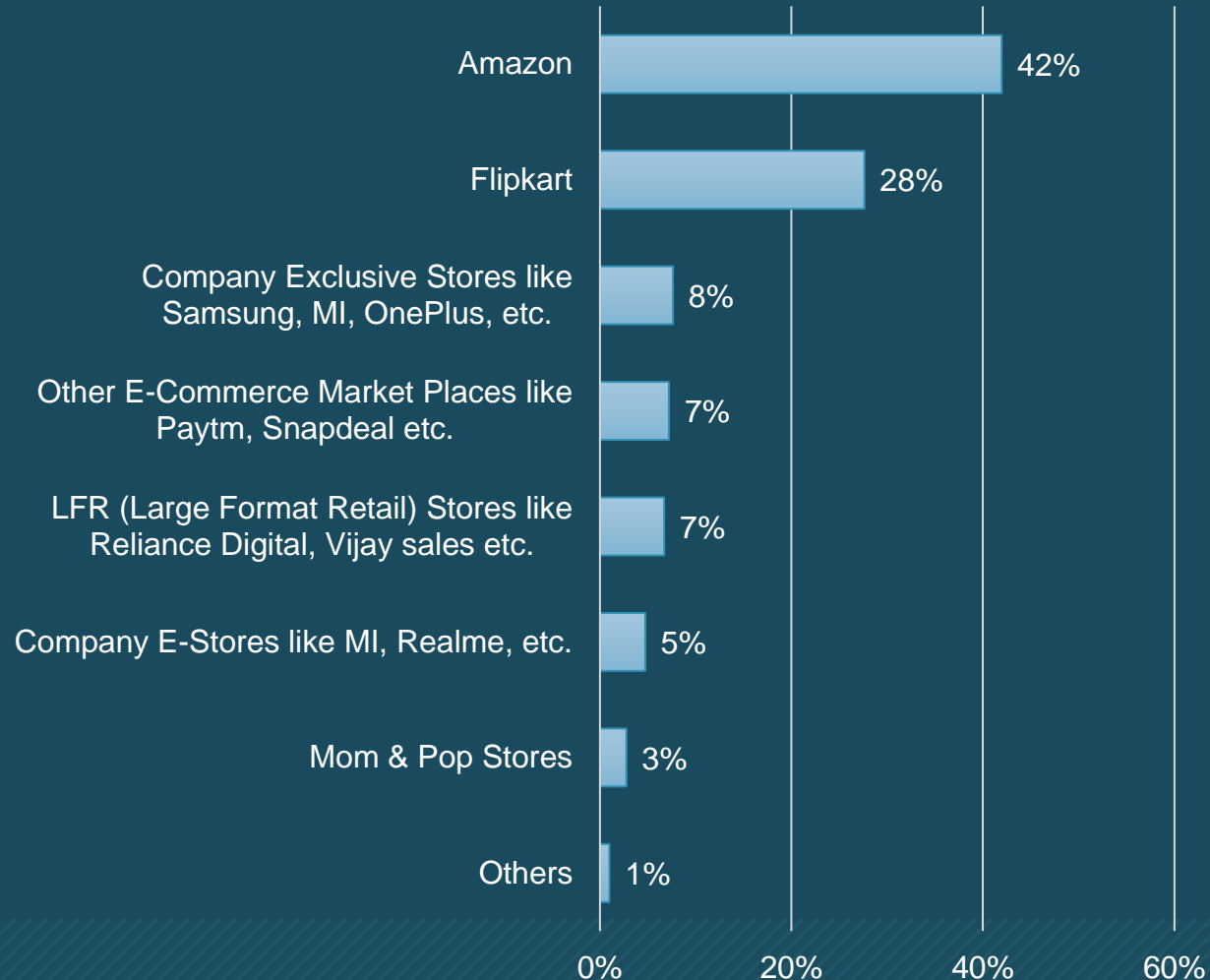
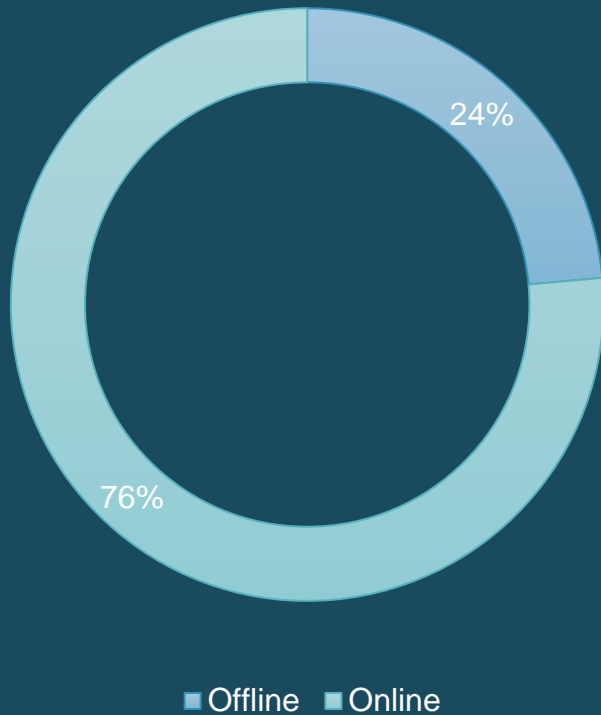


Largely, consumers are satisfied with the performance of the smart devices. However, smartphones have been there for several years, and the entire ecosystem has been working on improving the experience which has resulted in the device topping the experience score.

The audio experience has been one of the key expectations of consumers which has put a tremendous pressure on the TWS makers to meet the rapidly changing expectations complementing the present-day user needs.

# Where are users buying smart devices?

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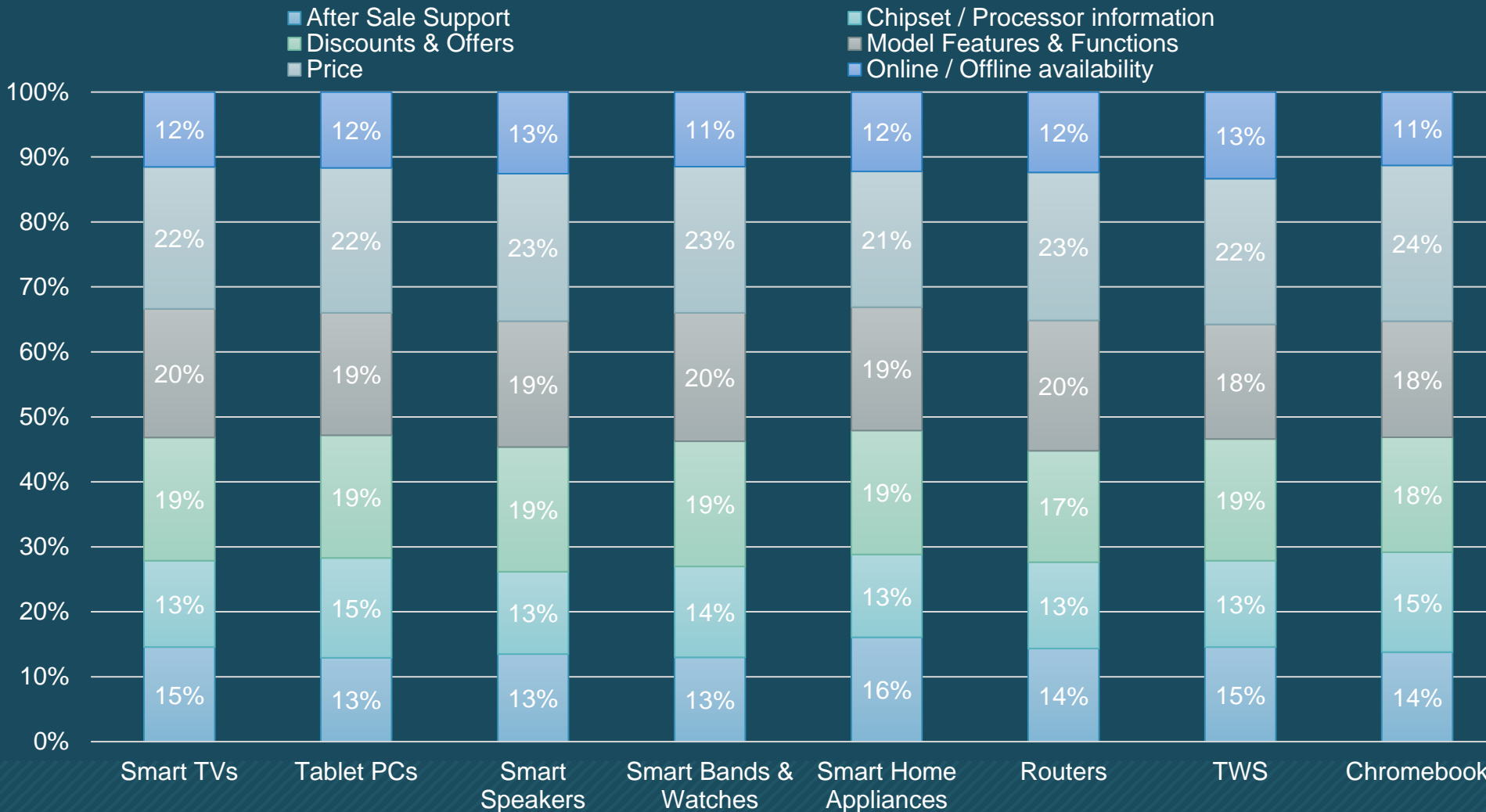


Online takes a leap in terms of preferred channel for purchasing smart devices. Undoubtedly, pandemic has led to growth of online channel.

The smart devices brands will have to think of creative ways of bringing customers to step into the experience stores where they want to show the entire smart devices ecosystem.

# Information consumers look for at the time of purchasing?

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Other than pricing, consumers seek information about the features and functions of smart devices that helps them narrow down on the right choice.

Information about chipsets has also become an important area; 3<sup>rd</sup> in priority.



# Which smart devices are users planning to buy?

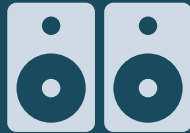
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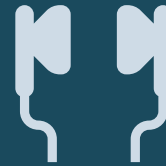
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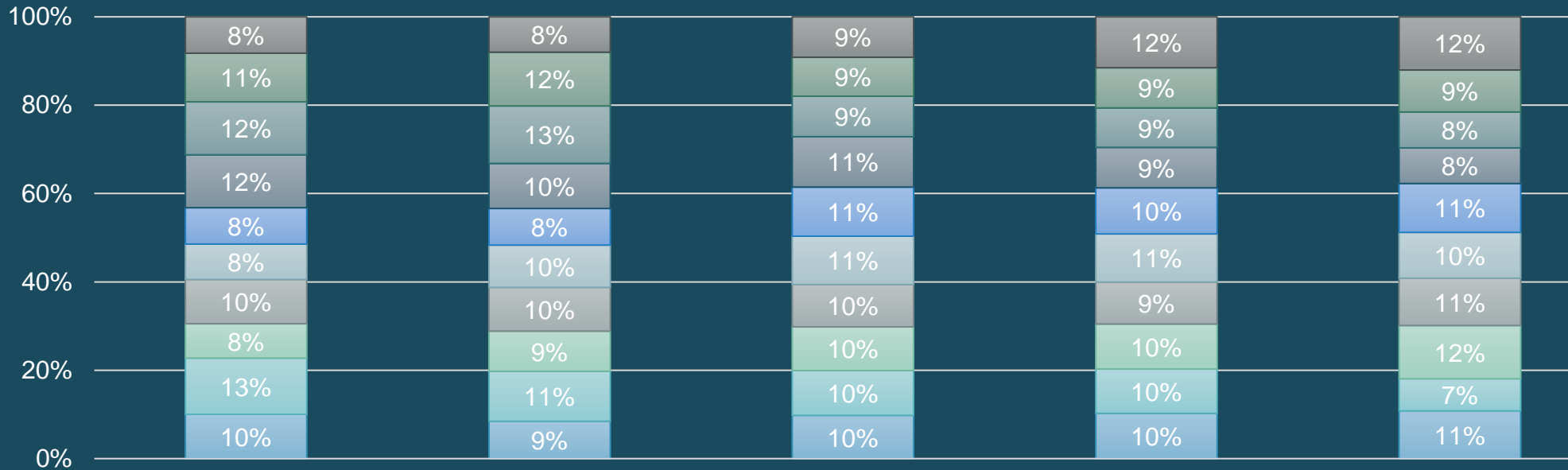
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Over next 2 years consumers have different smart devices on their shopping list.

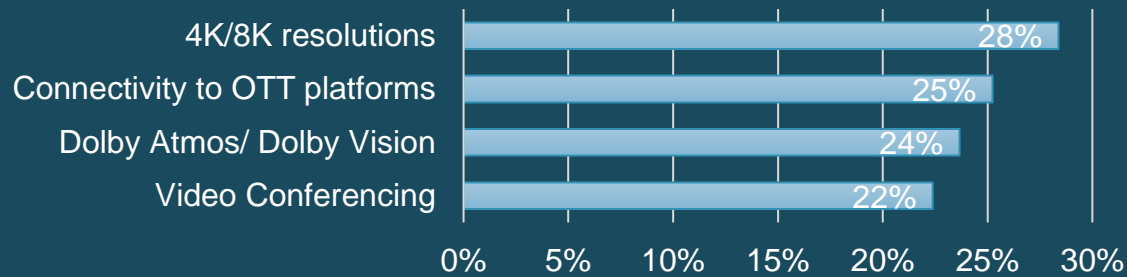
This trend of buying several smart devices for personal use as well as home / office use will continue to grow.

Though there is a hero smart device for each period, the opportunity is evenly spread.

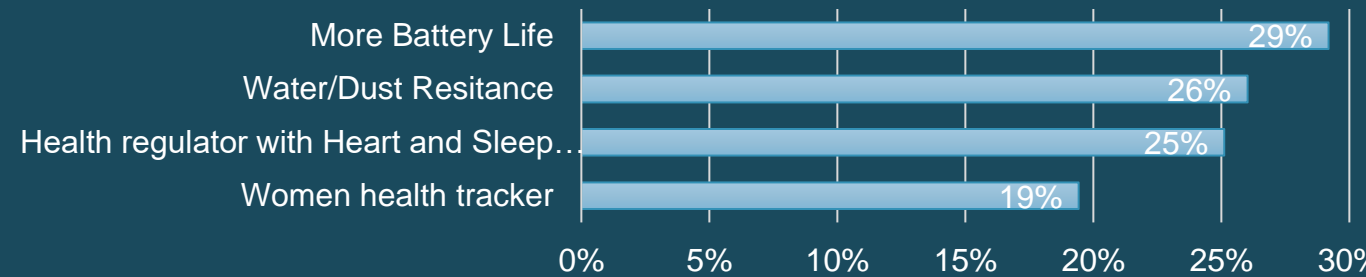
# Key features that consumers look for in smart devices

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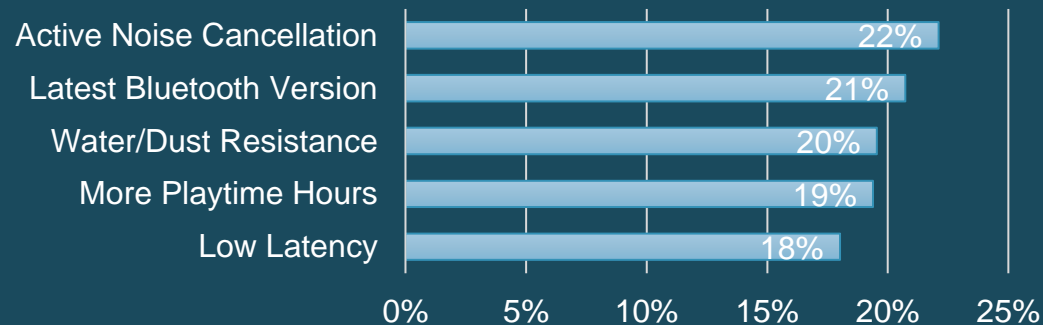
## Smart TVs



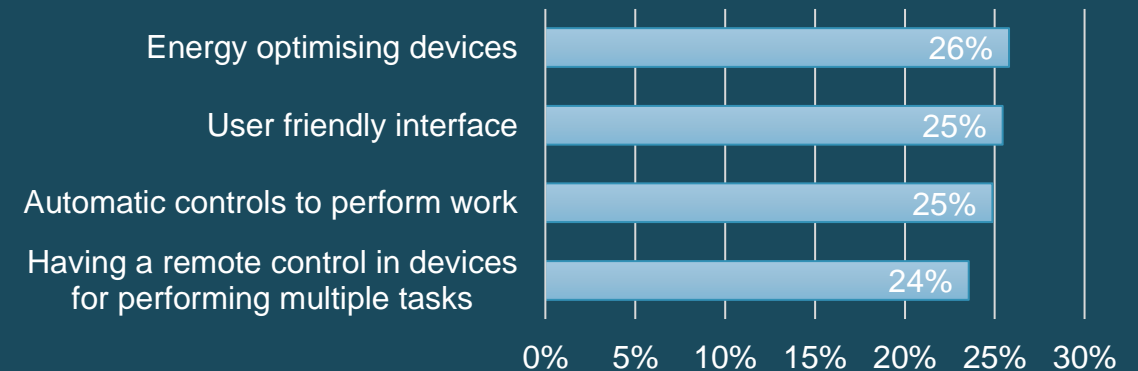
## Smart Wristables (Fitness Band / Smart Watch)



## TWS

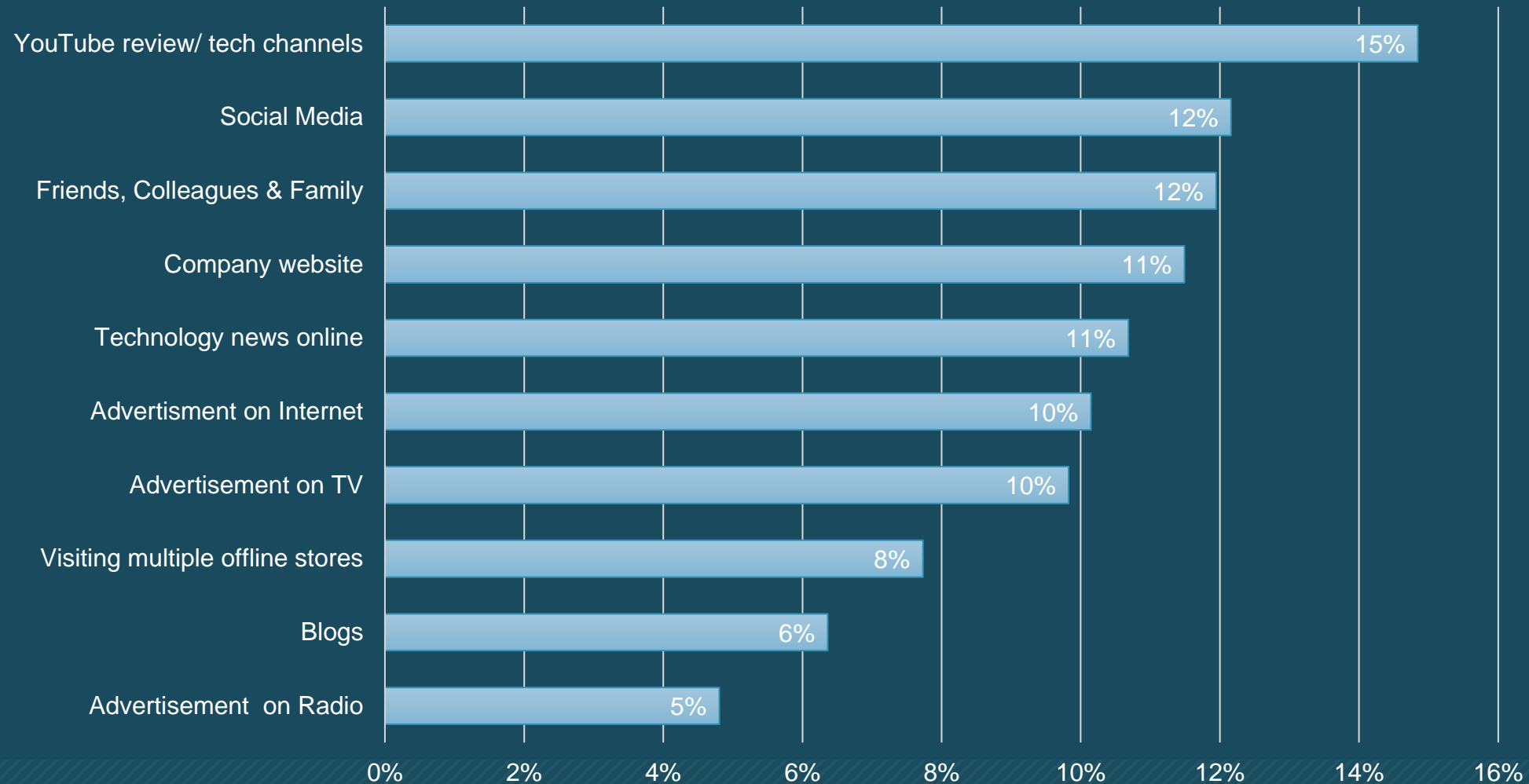


## Smart Home Appliances



# Sources from where consumers get information

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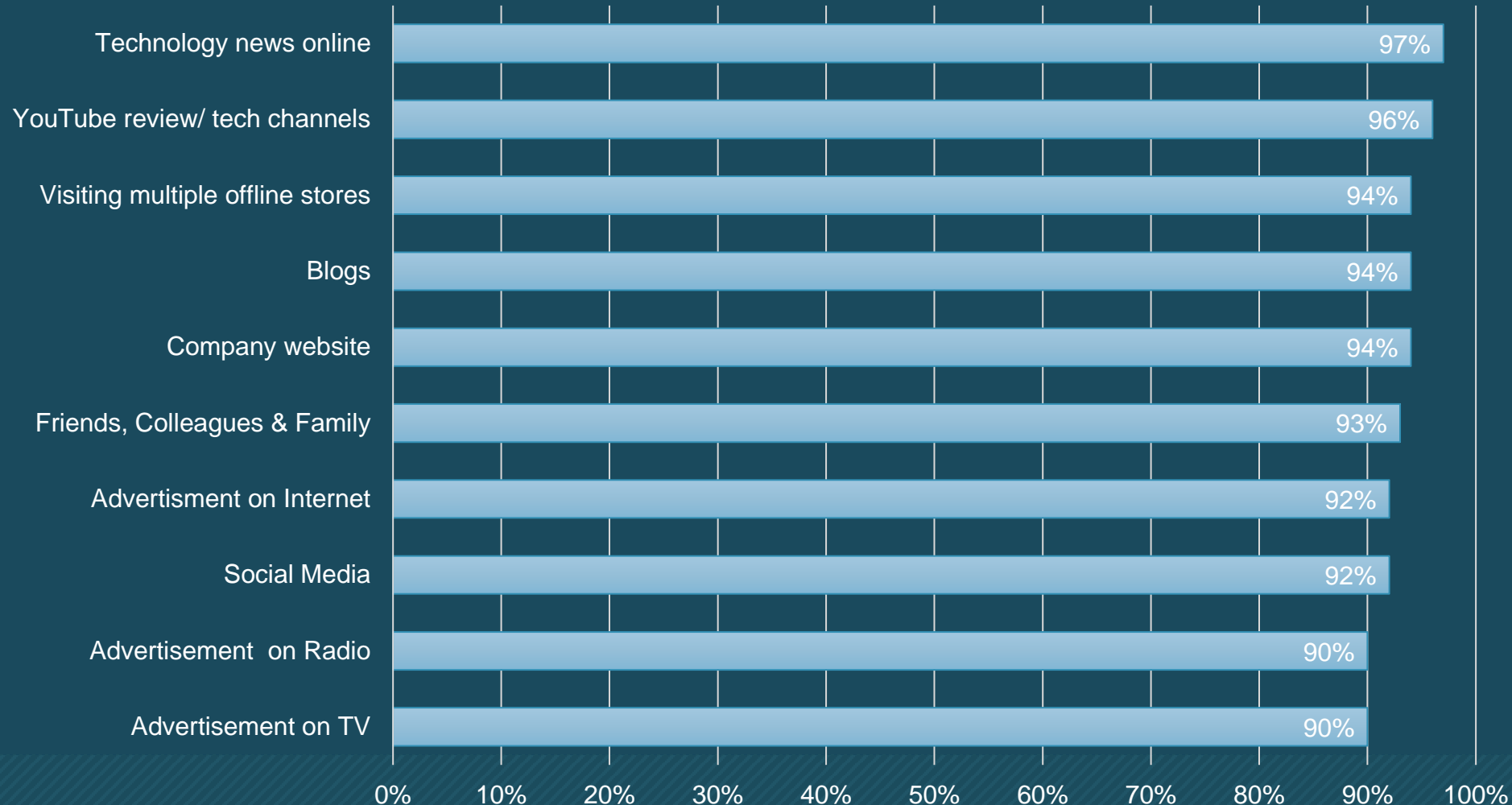


The preference of consumers about sources of information are moving towards video-based content as those give an immersive detail about these products.

However, traditional sources are equally important for getting information about smart devices.

# Satisfaction about the sources of information

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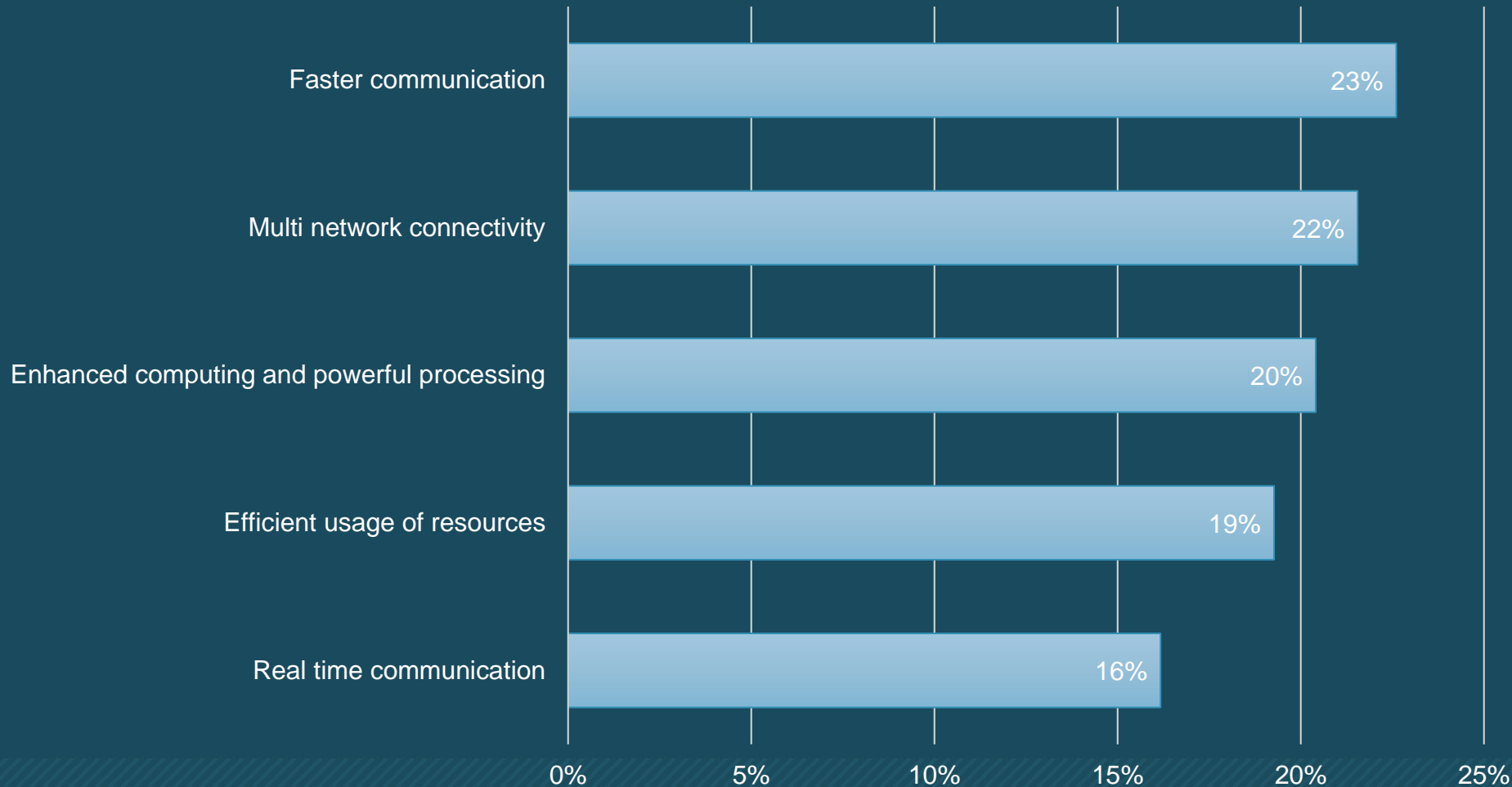


The best source for consumers looking for smart devices is a tech news portal. This is because of the quality, credibility and detailing of information that users get from such sources.

Advertisements are the least that consumers have trust upon.

# What role is 5G expected to play in smart devices?

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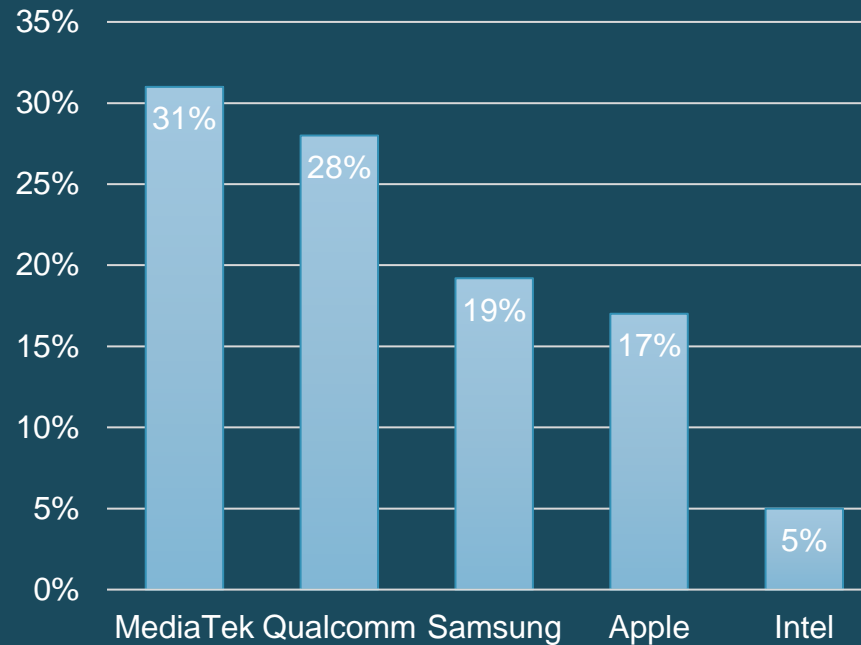
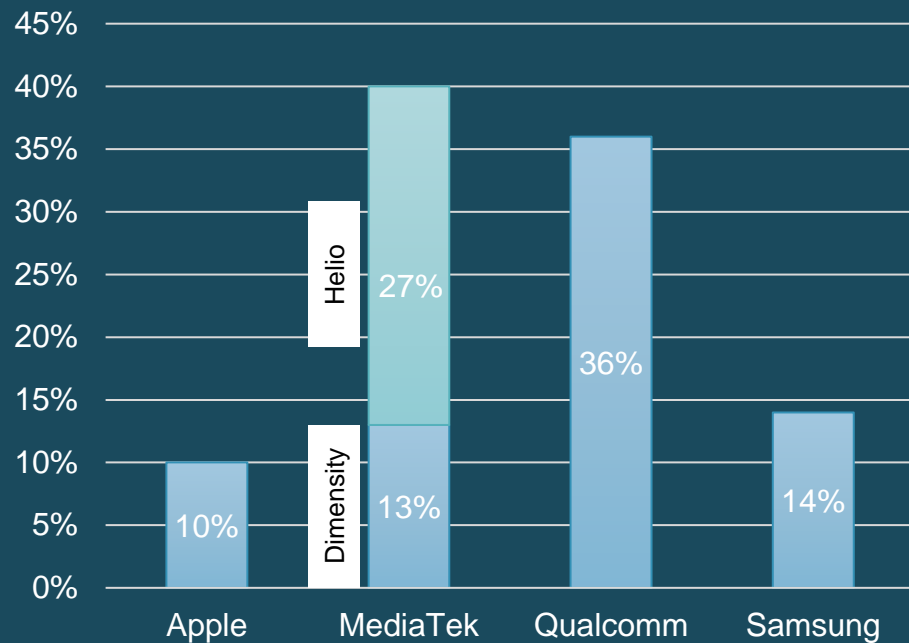


Consumers feel 5G has an enabling role in connected devices as well like in smartphones.

The 5G cellular connectivity in smart devices is expected to increase the efficiency, compute and make them intelligent.

# Smart devices growth is advantage MediaTek

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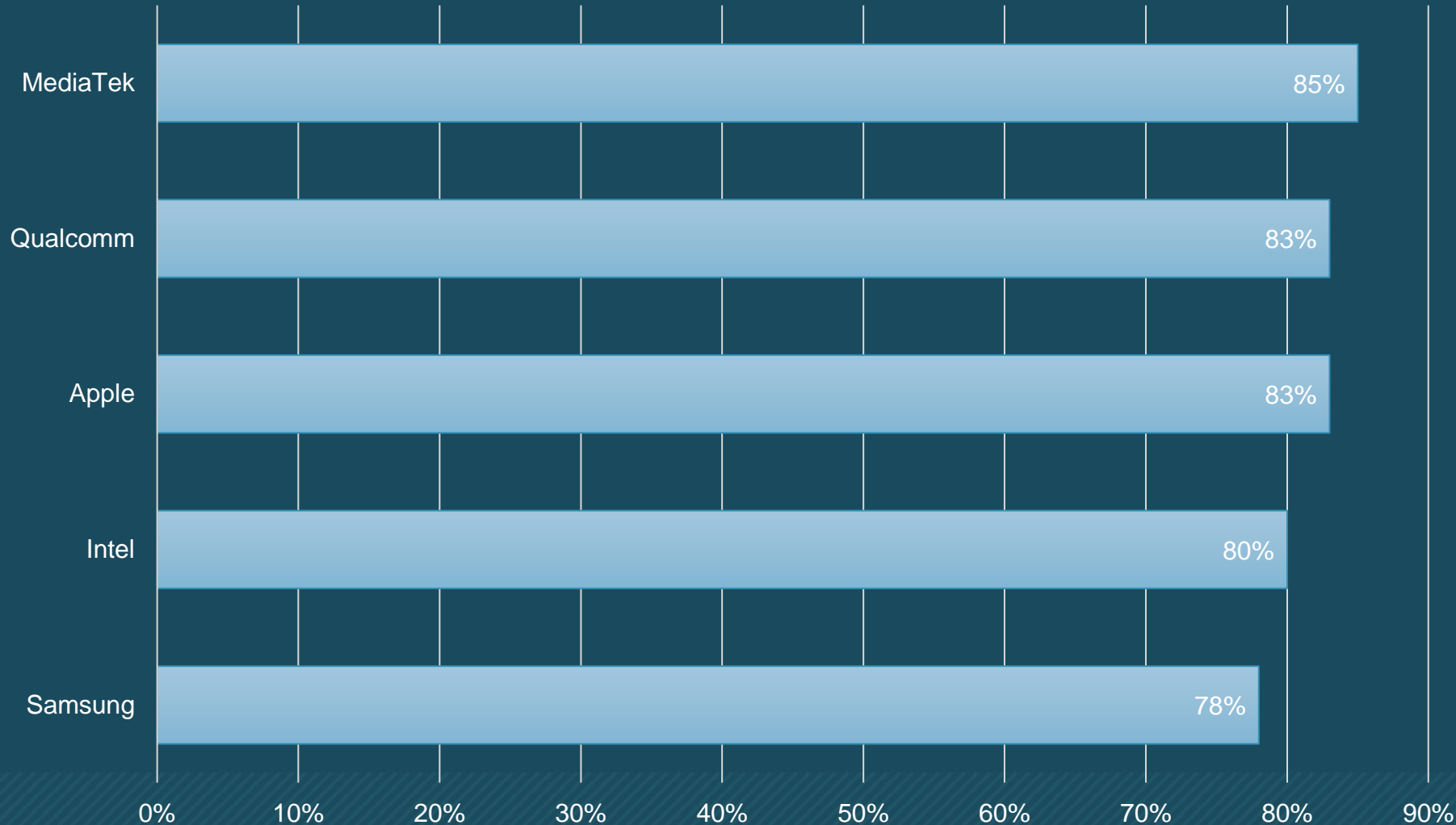


In the **Smartphone Arena**, both Mediatek and Qualcomm can be seen in close competition with each other.

However, as the consumer moves towards a **smart devices' ecosystem**, the preference for MediaTek is strong.

# And consumers know feel familiar about chipset companies

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Mostly consumers are familiar with the chipset brands that power smart devices.

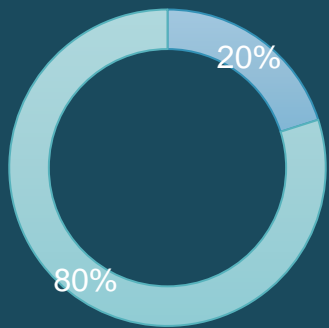
Among the chipset brands, MediaTek understanding is high among consumers.

However, the depth of understanding needs improvement so that consumers can understand chipsets and their usage better.

# Who is a connected Indian?

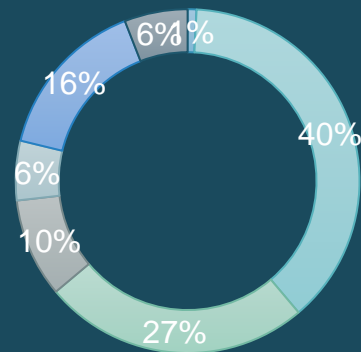
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## Gender



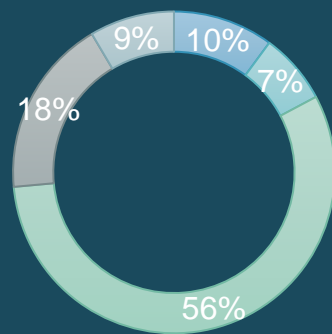
■ Female ■ Male

## Education



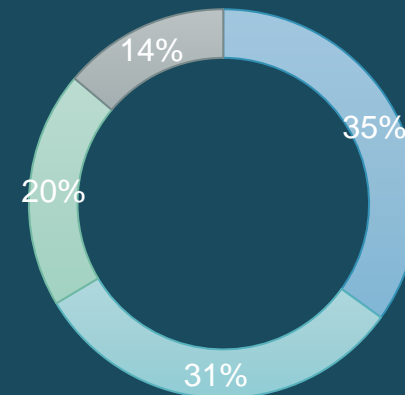
■ Doctorate  
■ Post-Graduate  
■ Schooling  
■ Other  
■ Graduate  
■ Professional  
■ Under-Graduate

## Employment



■ Government  
■ Private sector  
■ Unemployed  
■ Other  
■ Student

## Annual Individual Income



■ Upto 3,00,000  
■ 3,00,001 to 5,00,000  
■ 5,00,001 to 10,00,000  
■ 10,00,001 and above

The users across socio-economic demographics are increasingly adopting smart devices to enhance lifestyle and increase productivity.

Going forward, it is expected to further percolate among mass segments as industry continues to bring smart devices in the affordable segments.



# About the Research

- The objective of this research was to understand the growing trend of consumers buying smart devices ranging from personal smart gadgets like wearables to home / office automation devices.
- Techarc conducted this research basis survey among 1,500 connected consumers in India. The data was captured between Nov 1<sup>st</sup> to Nov 15<sup>th</sup>, 2021.
- The research was carried out in major cities / towns of the country which included Delhi NCR, Mumbai, Bengaluru, Hyderabad, Chennai, Kolkata, Pune, Ahmedabad, Jaipur, Indore, Chandigarh and Lucknow.
- The study was carried through online assisted mode through a structured questionnaire.
- The research was carried as per ESOMAR guidelines and code of ethics, which Techarc abides by being an institutional member.



**Thank You!**