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Stumble

Consumed

A deep dive into consumer culture in India

A DEEP DIVE INTO CONSUMER CULTURE IN INDIA

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ENTER THE RABBIT HOLE

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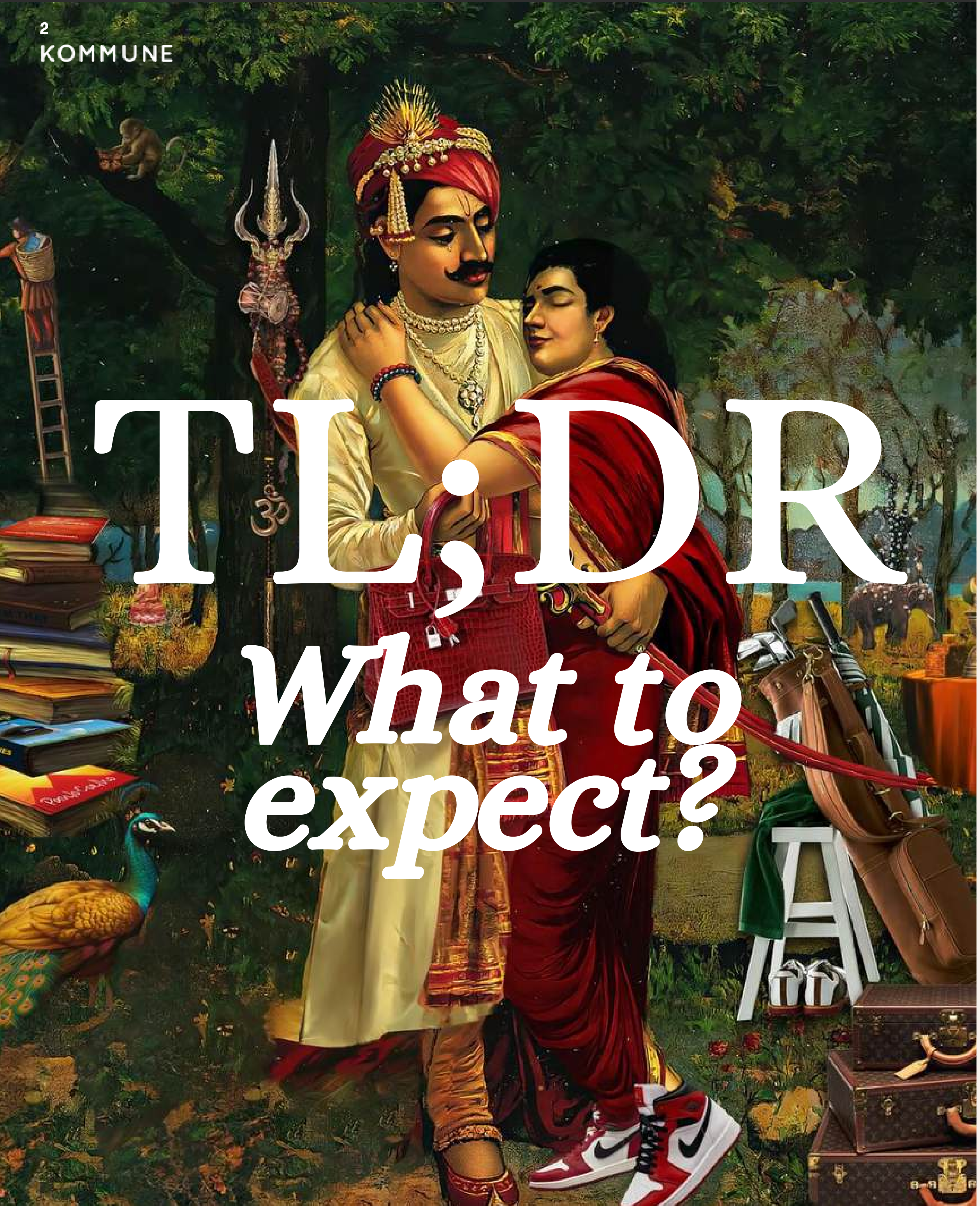
Consumed offers a spirited inquiry of consumer culture in India, diving deep into both online and offline realms. Unlike the unilateral focus on creation that creative industry reports sometimes lean into, we analyze the dynamic interplay between creation and consumption. This tug of war not only shapes mass behaviour but also drives significant shifts in how culture evolves. By dissecting this intricate relationship, our report reveals the underlying forces that influence and transform consumer trends and cultural practices in India.

We believe that creative industries are gate kept enough already – a theme touched upon in this report as well. It is up to those of us in this space to make it as democratic and level a playing field as possible. On our part, we have kept this report open access and free to consume, download, and share on the internet. We hope to continue nurturing this culture of free resource sharing.

Ria Chopra & Varun Kashyap

TL;DR
What to expect?



30 pages, **15 minutes**. That is what you will take to delve into this summation of insights from over 100+ artists, creators, marketing experts, brand leads, entrepreneurs, creators and design consultants on the major forces driving content consumption, culture and commerce in India.

This trend mapping study looks at **5 mega trends** that are in full force today — cultural **Waves** in action, opportunities and best practices of these trends in the content and consumption landscape in India. From India + Bharat to Humans, Rewired, each theme offers valuable insights for creators and businesses looking to capture audience imagination and consumer growth. Underneath each macro Wave, we highlight **Ripples**, which are **micro trends** happening as a consequence of that Wave, and **Undercurrents** which denote **warnings or nascent forces** that could still take any shape. Writing this report drew existential questions on the process of trend analysis as much as the future we are mapping. As researchers, we frame key questions, seek insights, and sift evidence from data. In telling these stories, we introspect on how this adds to the flood of 'expert opinion and insight' already out there, and how we can 'predict' trends periodically.

Matt Klein, Head of Foresight at Reddit, articulated this conundrum sharply as he framed two significant observations. One: 'Trends aren't meant to have a 365-day shelf life. It takes time for change to gestate.' The second observation he offers is that our cultures are in a state of stasis. Culture is stuck as 'creators and artists, meant to inspire, find themselves captured by algorithms, metrics and financial incentives.' As cultural analysts, we question our own predictions for its temporality and frailty amidst a rapidly evolving flood of content and consumption. Inspired by Klein and in a similar attempt to recalibrate, we ask you, the reader, to keep three perspectives in mind while reading this report, listed on the next spread.

1. Limitations of trends research

50 or 5000, no matter how many people we speak to, data can only take us so far. As you read through, some trends may be immediately relatable: they are unfolding right in front of you. Some others resonate, for you too have had similar thoughts and observations. And there are some trends that you may want to challenge. Regardless of your position, your subjectivity as a professional, student, marketer, makes you a part of building our creative futures. So don't take this report for gospel truth. Take what you wish from here and build what you must.

2. Be open

Our research team has done meticulous work and many conversations to get you this report. We recognise the limitations of these investigations, whether by numbers or time. The team at Kommune and Stumble aims to continue to investigate these trends, its micro strands and undercurrents continuously. Be open to the proposition that culture and ideas are ever evolving, and we aim to reflect as we grow. So be kind and open while reading this.

3. Dialogue & development

Own these insights. Get talking to your peers, partners and communities. Share with those who are in your sphere of influence. Let this be a one-to-many dialogue. Rationalise these ideas, break them down, rebuild and reshape. Trend mapping can't guarantee what will happen, but it gives you the tools and words to shape and build what may unfold. And so, use your peerage to bring more clarity to your visions for the future.

At Kommune and Stumble, we look at culture as more than a buzzword or business metric. **Culture is a living, breathing, ever-growing entity** – something for us to understand as well as to shape and impact in our own ways. In our work with brands on this front, we aim to present insights that are grounded in both fact and anecdote, betting on our interpretation of signals, research, and our own lived reality. We have helped brands, organisations, and collectives better grasp and harness cultural trends for their own growth. As media, technology, policies, and power continue to evolve, it is crucial for organisations and creators to stay informed and adaptable.

We believe that the findings in this report will serve as a valuable resource for creative industry professionals, helping them make informed decisions and driving innovation in their content and marketing initiatives.
This is an effort that serves the culture industry of India at large and is designed as a collaborative idea, by experts and influencers – those who have a pulse on contemporary India. We extend our gratitude to all the contributors, researchers and collaborators who have made this study possible. A detailed list of acknowledgements is provided at the end of this report.

There's something incredible brewing in the world of culture. As technology collides with creativity, we need more than short burps of insta psychology to uncover trends. Like tattoo ink, the report gets under the skin to paint this picture.

Rashmi Dhanwani

Stumble strives to be a true culture soothsayer. We collaborated with those who are deeply curios, and brought diverse perspectives to this exercise. I can safely say this is a marauders map of the culture world.

Roshan Abbas

As a creator, I have embraced Paul Graham's dictum that it is better to be loved by a few than liked by many. This report build the kind of deep engagement that lasts. And for this, you need to be true to yourself, and create what you love. Love shows. Love compounds

Amit Varma

Trend overview

Default Mode: Online

- Authenticonomy
- Short Form v/s Long Form
- Behind the Screens
- Creative Careers

India + Bharat

- Identity Harvesting
- Conservative Churn
- India vs Bharat?

Compulsive Convenience vs Conscious Consumption

- Loyalty Reframed
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Worlds of One

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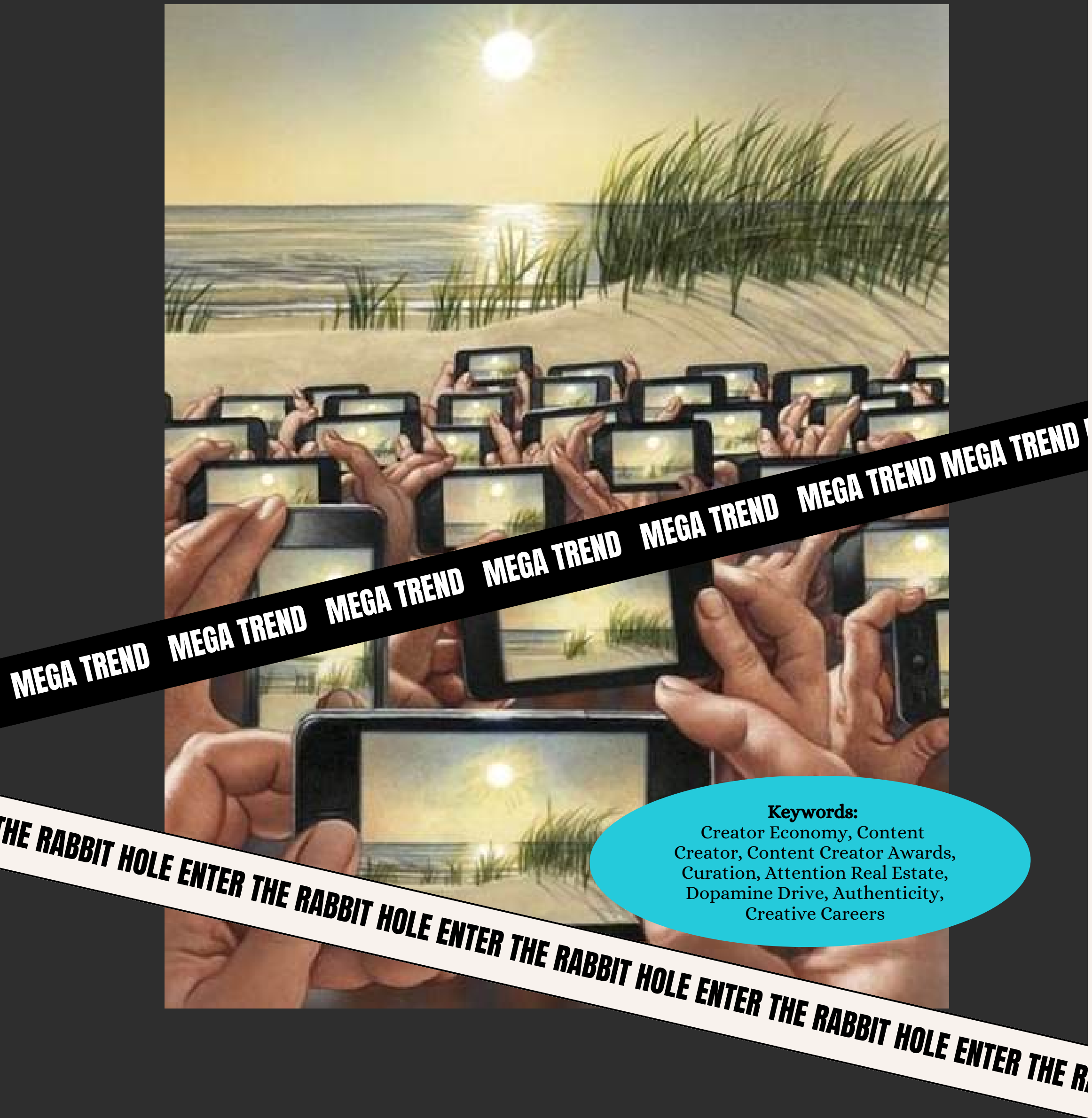
Humans, Rewired

- AI as a Co-pilot
- Art fuels tech fuels art
- Evolving Employment
- Digital Microdosing of Relationships

Mega trend one

DEFAULT MODE: ONLINE



Keywords:
Creator Economy, Content Creator, Content Creator Awards, Curation, Attention Real Estate, Dopamine Drive, Authenticity, Creative Careers

Default Mode: *online*

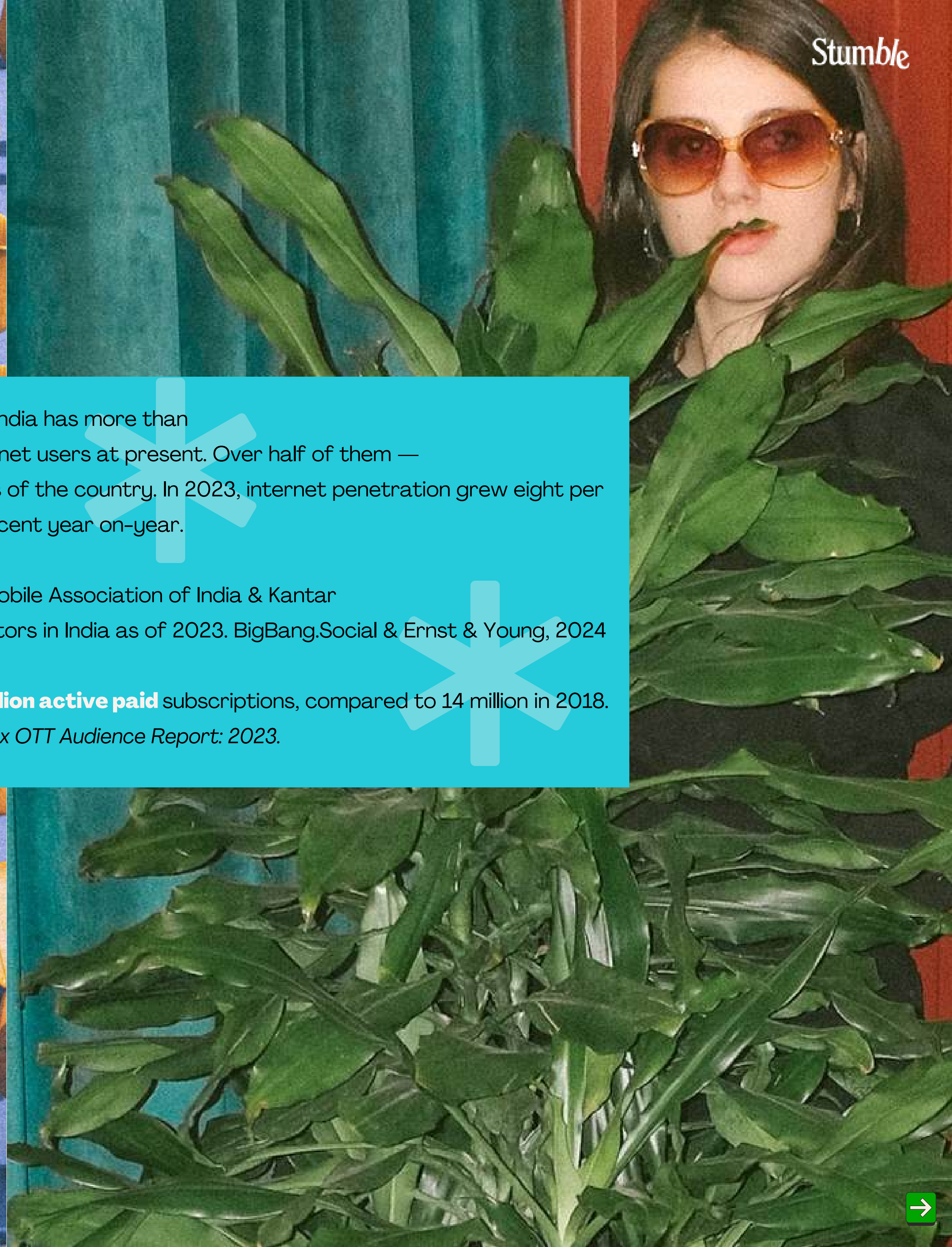
One day we logged in to the internet and we never left. Default Mode: Online.

We're now terminal gluttons for content, taking every chance we have to get our 'consumption fix'. We now navigate a vast content landscape with intention—choosing creators we like, using free and paid platforms that fit our tastes, evaluating the content we consume, and seeking inspiration and ideas to become creators ourselves.

It's been a decade since the OG internet-first Indian creators like Tanmay Bhat, TVF, and Prajakta Koli have been in the lives of consumers. Audiences are no longer baffled by internet fame, with the pathway to creation being both aspirational and attainable.

Viewing the fame, money, and opportunity of internet stardom through rose-tinted glasses, and thinking that they can handle the consequences, it is almost too easy for consumers to step over into creator category. **Lines between creators and consumers are hence blurring, giving rise to a burgeoning new creator-consumer class: a Neo-Creator**. The Neo-Creators have opinions and they want to share it, they assert their place in a rapidly changing world in screens, gaining followers, likes, and street cred, building themselves up as one builds an enterprise — **Start-up You**. Consumers' investment in the Neo-Creator comes from their authenticity, seeming relatability and allure, leading to parasocial relationships. Creators today can flex their creative muscles from the comfort of their home and phone, turning into vertical invaders challenging the traditional celebrity. There's a perceived ease of earning money, coupled with the notion of escaping from the traditional 9-to-5 corporate spiral.

Log kya kahenge is less of a worry and more of an aspiration today. You want to be talked about, heard, and shape your own identity. The force of the Neo-Creator is enabling democratic content creation, sprouting creative careers, redefining social capital, and shaping market opportunity for brands.



India has more than
820 million active internet users at present. Over half of them —
442 million — now come from rural parts of the country. In 2023, internet penetration grew eight per cent year on-year.

Internet and Mobile Association of India & Kantar

There are roughly **930,000** content creators in India as of 2023. BigBang.Social & Ernst & Young, 2024

India has 481 million OTT users and **102 million active paid** subscriptions, compared to 14 million in 2018.
The Ormax OTT Audience Report: 2023.

Authenticonomy :

As on-demand content and digital streaming are on the rise, consumers are dealing with **content glut**. This glut gives rise to a dual conundrum that invariably ends with oversaturation and exhaustion. Consumers are seeking curated content while dealing with FOMO on what's beyond.

Meanwhile, the creator wants to find their niche while aiming for mass appeal. The only way out of this cycle is **self-curation**. You curate your consumption and creation of content to mirror your most authentic identity, or opt in to the identity you want to be most associated with, across all the platforms you choose to engage on.
Brands and creators who are more real than rehearsed make it easier for a more discerning audience to perceive the core ethos of values running through their content. And visible, honest authenticity is valuable. Resonant creator-brand partnerships will arise from an alignment of the voice of the creator, the identity of their consumer, and the brand's offering, creating the trifecta of the authenticonomy.

- ***Whole Truth Foods is a brand that has captured the authenticonomy, with a refreshing tonality centred around no-nonsense marketing. By being transparent, as their name reflects, the brand has built trust among their consumers. Their other brand strategies such as launching an informative newsletter have further helped solidify their image and values.***

FLICK VS FLIP:
the platform dilemma

Short-form vs long-form is a coin with more than two sides: creators, consumers, brands, and the algorithms. Audiences consuming short and long-form content, do so to serve **specific needs**. Short-form, bite-sized, visually appealing content is relatively easy to consume, providing viewers opportunities for entertainment, engagement and co-creation. In contrast, they choose long-form video content for deeper learning, episodic engagement, and extended viewing sessions.

For the Neo-Creator, short-form content is perfect for attracting attention, driving immediate interaction, and enabling content discovery. Long-form content, on the flip side, is valuable for nurturing relationships and maintaining prolonged engagement. Currently there seems to be a **skew towards bite-sized content**. Brands are chasing numbers and low production costs, creators have a more lucrative effort to reward proportion, while platforms are correlating shareability to catchment of user attention. Snackable content, hence, seems to be a win-win for all parties. But this may be a myopic view.

The depth of engagement and community garnered through long-form content is hard to replicate, and ensures a shelf life longer than short-form creators

A deluge of content attuned to perceived audience preferences and favourable metrics,can create situations like the current **Apodcalypse**. Brands need to look beyond metrics in their own content as well as in creator partnerships, and arrive at measures with more lasting impact.

Eventually, we might never find a format that bridges the gap between the deep engagement of long-form and the discoverability of short-form. But one clear pathway is elevated storytelling, regardless of the medium.

Dolly Singh's Instagram series Best Worst Dates leverages the vertical frame to share compelling narratives that cater to shorter attention spans without compromising on the quality of storytelling. The 90-second, episodic series is a brand-integrated collab with St Ives. On the other hand, Naina Bhan and Sakshi Shivdasani funnelled their engaged audiences on their Instagram pages with short-form reels to their new podcast, Moment of Silence, on Youtube. Both of them have now forayed into vlogging to extend their transition from portrait mode to landscape mode — deepening their connection with their audiences. A multi-platform strategy is one of the best bets to balance long-form and short-form, specially for brands and creators who don't want to go all-in on either.

Behind the Screens:

Both creators and consumers are consciously going Airplane Mode – logging off to touch grass, turning on screen timers, and using quiet mode.

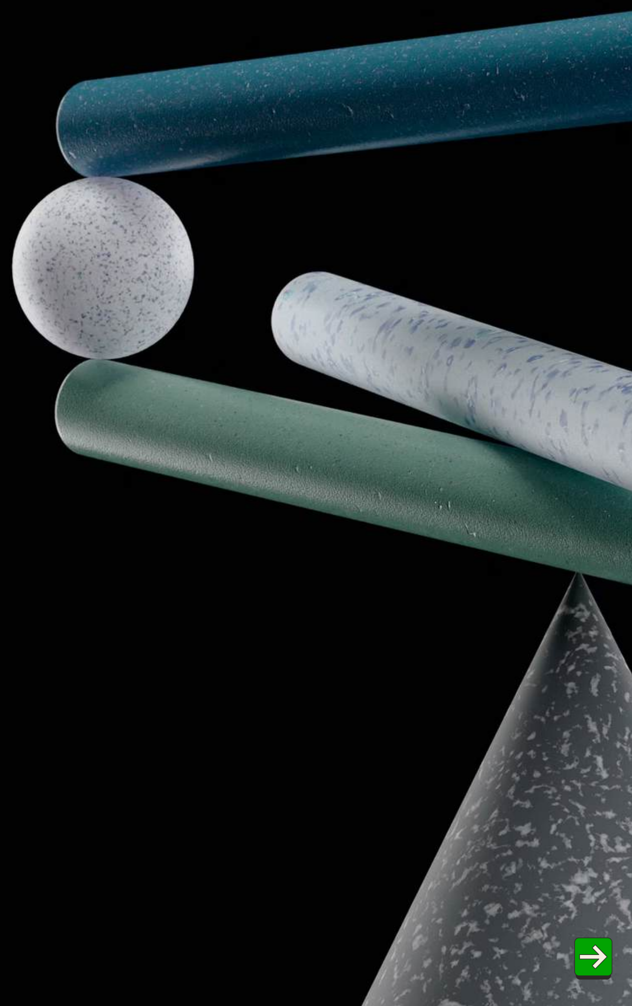
As platforms continue to leverage algorithms to optimise user engagement and trigger dopamine responses, consumers are increasingly recognising the collateral effects on mental well-being and working to resist the effects of social media dependence. Even creators are taking mental health breaks, recognising the toll of creation, and weaning off retention-based editing as an act of reclaiming control.

There will be more conversations around the fragility of fame, the paradox of parasociality, and the disconnections our screens are perpetuating, with an overall sentiment of **raging against the machine.** The demand for platforms promoting **digital well-being** is growing, signalling the shift in viewing audiences as more than just mere metrics keyed into the algorithm. Terminally online users are also taking Social Siestas to recalibrate and detox.

Brands and creators can adopt a more empathetic approach in their interactions. Meta and self-referential creator content that acknowledges the algorithm fatigue is being widely shared.

There is an uptick in people wanting to unplug, seeking IRL extensions of their URL personas giving rise to **phygital communities** like Cubbon Reads and Nike Run Club.

Brands are meeting their audience where they are or creating phygital spaces of expression for what their consumers are seeking. Nykaaland, Tinder Queer Made Weekend, Zomaland, and even IPL team Royal Challengers Bangalore, are creating 'micro-communities' like this to saddle up closer to the customers who appreciate them most, creating a bridge between the reel and the real.



Stumble

Creative Careers:

Creative careers across India are starting to flourish and New Media has reshaped widespread perception as individuals harness emerging business models and economic opportunities online. This movement has ushered in a plethora of new content formats, platforms, and events, empowering people to express their artistic flair. The **acceptance of non-traditional career paths** is growing, and side-hustles and reframed creative moonlighting are becoming fairly popular.

The entry of Gen Z into the workforce is **changing work culture** as well: you can be an associate by day and CEO of your own company by night. Diversification and multi-hyphenation are catalysts of a **knowledge culture** where people want to upskill to unlock upward mobility. Creator workshops, non-traditional colleges and business schools, and disruptive career successes are emerging as probable accelerators. This enthusiastic creative population needs infrastructural support, platforms of recognition, institutional investment, and access to mentorship and guidance.

Brands could function as **Creative Incubators** and build the next brand of Neo Creators who will then help their enterprise with media.

- *With creators' captive audiences, brands led by them save on distribution spends allowing them to diversify their revenue streams and not solely depend on sponsorships. Creator brands like Peach by Vishnu Kaushal, Wakeup Juice by Ankita Chawla and creator-curated product lines with companies like Freakins are flourishing.*

- *Bootstrapped collectives and independent creators will find support and a larger platform via authentic brand partnerships, unlocking opportunities otherwise not feasible. Swiggy's buyout of the @mumbaifoodie community signals one such investment by a brand in Start-up You.*

Undercurrents

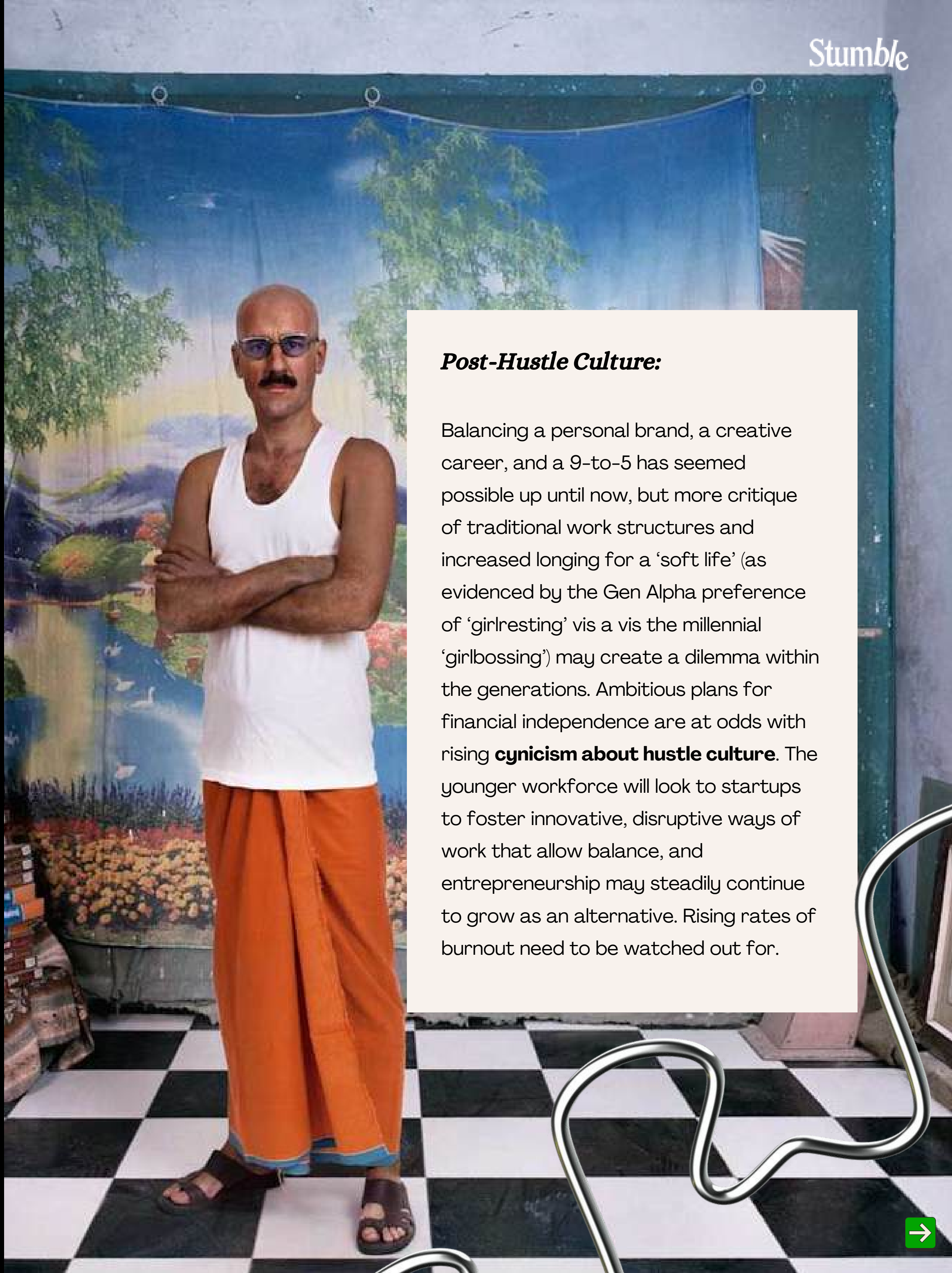
Seeing through Screens:

Individuals on social media are becoming more prudent and are **seeing through screens** due to more knowledge of how PR and industry machinery works, through observation, democratisation of discussions on social media, and the rise of **watchdog accounts** like DeuxMoi and DietPrada or DietSabya. This leads to a constant questioning of narratives, where what one sees on screen isn't enough for us to be convinced about what's behind it, leading to a **call-out culture** where inconsistencies in creator personas are highlighted and dissected. While this ties in with the rise of the authenticonomy, there is also a dark side to it: when does watchdog culture become too intrusive or unhealthy? When does 'calling out' cross private boundaries of individuals? Does this actually keep brands and individuals accountable, or just give rise to more sophisticated forms of persona-building?

Keeping up with the Creators:

Traditional careers, corporations, and companies are already being modified by the forces of the creator economy. Industries such as publishing and thought leadership, that rely on the persona of the people they espouse, are evolving to include creators within their fold, as are more traditional brands which have starting introducing in-house creator roles. A key balance needs to be struck between bringing the best of creators and creation within these traditional structures, as well as retaining the quality and merit-based systems that people look to such industries for.

For creators themselves, one can expect increased regulation (such as taxation), increasing conversation around the toll of content creation on mental health, and issues such as the inundation of creators in the economy as well as shortening creator shelf-lives.



Post-Hustle Culture:

Balancing a personal brand, a creative career, and a 9-to-5 has seemed possible up until now, but more critique of traditional work structures and increased longing for a 'soft life' (as evidenced by the Gen Alpha preference of 'girlresting' vis a vis the millennial 'girlbossing') may create a dilemma within the generations. Ambitious plans for financial independence are at odds with rising **cynicism about hustle culture**. The younger workforce will look to startups to foster innovative, disruptive ways of work that allow balance, and entrepreneurship may steadily continue to grow as an alternative. Rising rates of burnout need to be watched out for.

Brand spotlight

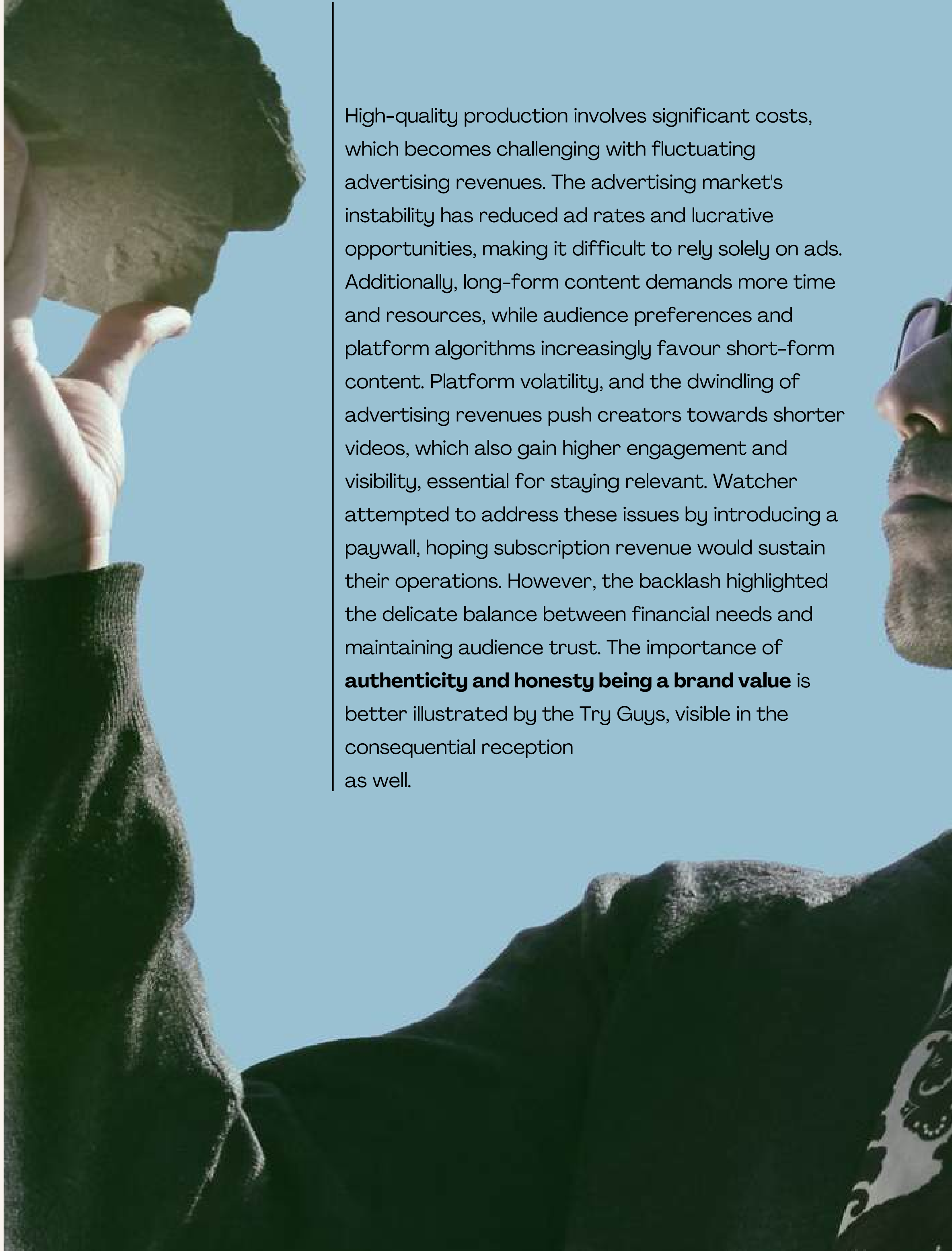
Two significant creator-brands, Watcher Entertainment and the Try Guys, have recently pivoted to launching their own paid subscriptions and have instigated audience responses that showcase the **tensions of the neo-creator**.

Watcher Entertainment, a YouTube channel of comedy content formed in 2019 by ex-BuzzFeed creators Steven Lim, Ryan Bergara and Shane Madej, announced in April that their future videos and shows would now only be available on their own streaming service (watchertv.com) priced at $6 per month.

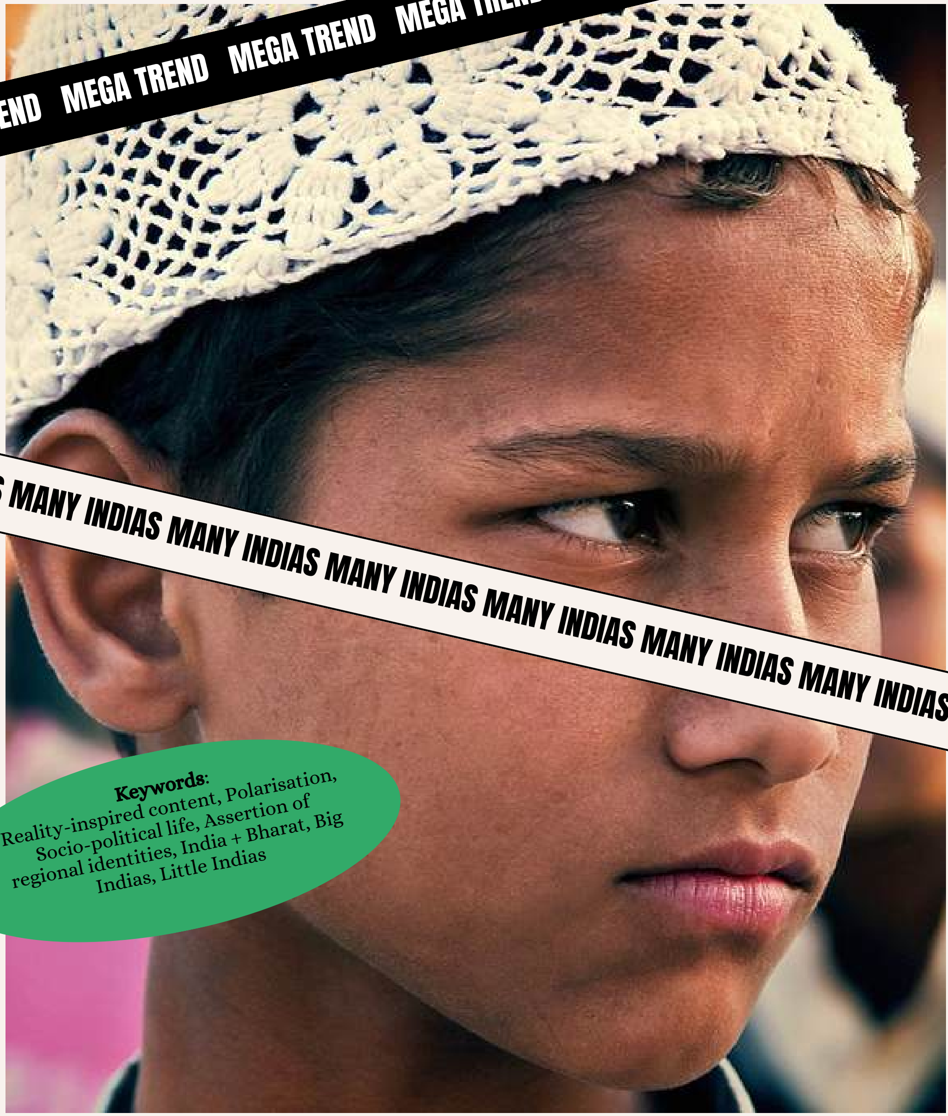
From Watcher's perspective, the struggle to continue producing long-form content stems from financial and market pressures. They received instant, furious backlash from audiences, many of whom said they wouldn't subscribe to the service that was seen to be a cash grab.

In May, the Try Guys, also a collective of ex-BuzzFeed creators, announced their own move to a streaming service. In contrast, their announcement was more transparent, clearer in its communicated intent, and with a more reasonably priced subscription offer of $3-4 per month.

Furthermore, most of their videos would be uploaded to YouTube after a delay of a few weeks. Try Guys' audience responded with sympathy and excitement for the move. More content is always better – and the Try Guys positioned their shift as a way for them to sustainably create more.



High-quality production involves significant costs, which becomes challenging with fluctuating advertising revenues. The advertising market's instability has reduced ad rates and lucrative opportunities, making it difficult to rely solely on ads. Additionally, long-form content demands more time and resources, while audience preferences and platform algorithms increasingly favour short-form content. Platform volatility, and the dwindling of advertising revenues push creators towards shorter videos, which also gain higher engagement and visibility, essential for staying relevant. Watcher attempted to address these issues by introducing a paywall, hoping subscription revenue would sustain their operations. However, the backlash highlighted the delicate balance between financial needs and maintaining audience trust. The importance of **authenticity and honesty being a brand value** is better illustrated by the Try Guys, visible in the consequential reception as well.



Keywords: Reality-inspired content, Polarisation, Socio-political life, Assertion of regional identities, India + Bharat, Big Indias, Little Indias

Mega trend two
INDIA + BHARAT

India + Bharat

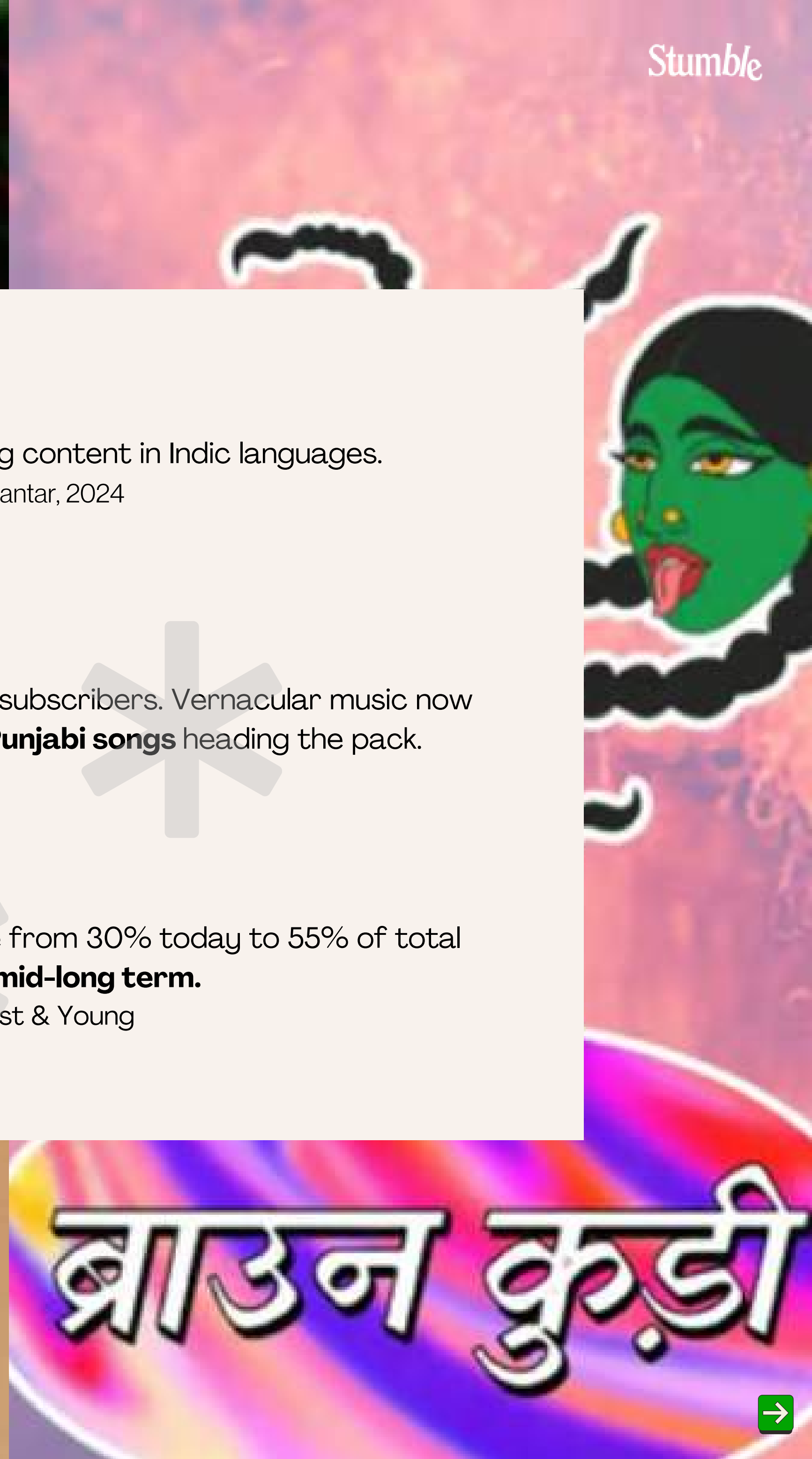
Although diversity is in India's DNA, what we are observing is the challenge to the dominant idea of India – A Hindi-speaking, sari-wearing and Bollywood-led India is giving way to voices and stories from various parts of the country. There's a growing yearning for consumers and creators from across India to share their India, leading to the emergence of the **Many Indias narrative**.

Fueled by the emergency of diverse content platforms and diffusion of content channels, **the Many Indias assert their diverse socio-cultural, economic, and geographical landscapes** amidst a fast-growing economy. With a creator out there for every language, landscape, group, and culture, this trend is reshaping how audiences like to consume and decode their part of India.

Led by a deep sense of ambition for the big country they inhabit and the micro-cultures they identify with, consumers are **engaging deeply** with content from languages and cultures other than their own.

Indian Exceptionalism is on the rise: a belief that India's art culture and heritage are exceptional, espoused in how Indians globally, and online, take pride in their history, cultures, homegrown brands and people. Indian brands are gaining more mainstream recognition – from Priyanka Chopra, Sabyasachi, Forest Essentials to global superstars such Diljit Dosanjh.

With foreign-born Indian origin professionals such as tech CEOs and musicians emerging, we also see a 'return to roots' movement. This trend also comes with key concerns in areas of **morality, political polarisation and divisiveness**. Inequality of resources, access, and power are further highlighted. It is easy to grow apart. It is harder to stay together while recognising our differences. Where do we go from here? How we portray and engage with our identity online through content, consumption, and creation, is increasingly becoming a key part of our existence.



In Urban India, **57% of internet users** prefer accessing content in Indic languages.
Internet and Mobile Association of India & Kantar, 2024

The audio OTT industry in India has 8 million active subscribers. Vernacular music now accounts for **34% of all audio streams with Punjabi songs** heading the pack.
Redseer, 2024

The share of vernacular content will increase from 30% today to 55% of total content **produced in the mid-long term.**
#Reinvent, FICCI & Ernst & Young

Identity Harvesting:

India's diversity today has spawned several micro-subgroups with increasing disposable incomes, distinct voices and spaces to make them heard. Consumers are seeking platforms that resonate with their world view and share their unique stories. Whether it be region, gender, sexuality, language, or even age – **all our identities can and are being harvested by brands and creators as identifiable consumer groups**. There are brands, individuals, and services to cater to every single aspect of you. Now everyone has a voice and more avenues to find a group to identify with, leading to communities on the internet centred around personality traits, geographical location, language, consumption habits, and aesthetics. Parallelly, there are now more issues and avenues to disagree with opposing groups in the fray. Creators/ brands have to self-moderate more than ever in order to not alienate or offend any of the many Indias.

The acknowledgement of multiple identities also means that they coexist, and one may take precedence over the other at different times, in an intersectional montage. **Constant evolution of both creators and brands** is important in this shifting scape, and positive evolutions are stickier than negative.

- *Zomato's vegetarian-only delivery fleet, with green uniforms, is a case of identity harvesting gone wrong. While identifying an identity (vegetarians) which could be appealed to by their brand services, their premature and sweepingly oversimplified strategy ignored the negative consequences of their actions. They were quickly forced to roll back their green fleet, and the PR damage was substantial. Still, their stock had an uptick – indicating that there was a gap in the market and an identity that wanted to be appealed to.*

Conservative Churn:

Strong identities are being asserted and expressed against the background of emerging right wing political trends globally, leading to an increasingly **polarised population.** This churn, driven by a mix of nationalism, traditional values, and conservative ideologies, has been prominently playing out online. It manifests in behaviours ranging from community building and solidarity to divisive trolling and polarisation. Deepfakes and conspiracy theories are being platformed, and an overall **trust deficit** is leading to pockets and bubbles on social media. These **radicalisation rabbitholes** feed off each other and contribute to polar understandings of what is real. There will be a reckoning with what it means to be Indian. How do we fit our multiple identities in a consolidated whole? One way to go is to draw more attention to issues which unite rather than divide, such as financial woes and concerns of the wallet, but in a post-truth society, can we align on facts?

The recent General Election results in India demonstrated that the average Indian prioritises broader concerns of unemployment, rising inflation, and perceived threats to the constitution, over the rhetoric of religious sectarianism. A few internet creators and independent journalists like Ravish Kumar, Faye D'souza, and Dhruv Rathee, are trying to balance rabid bots and general misinformation with reason-led content. However the ones who capitalise on extremism are still pulling audiences towards the poles.

- *Organisations such as the Internet Freedom Foundation are creating awareness and nurturing activism around public services such as the internet. By simplifying complex bills and laws, having accessible discussions, and reaching Gen Z where they are – online – this method of operation creates more open discourse on things that matter.*

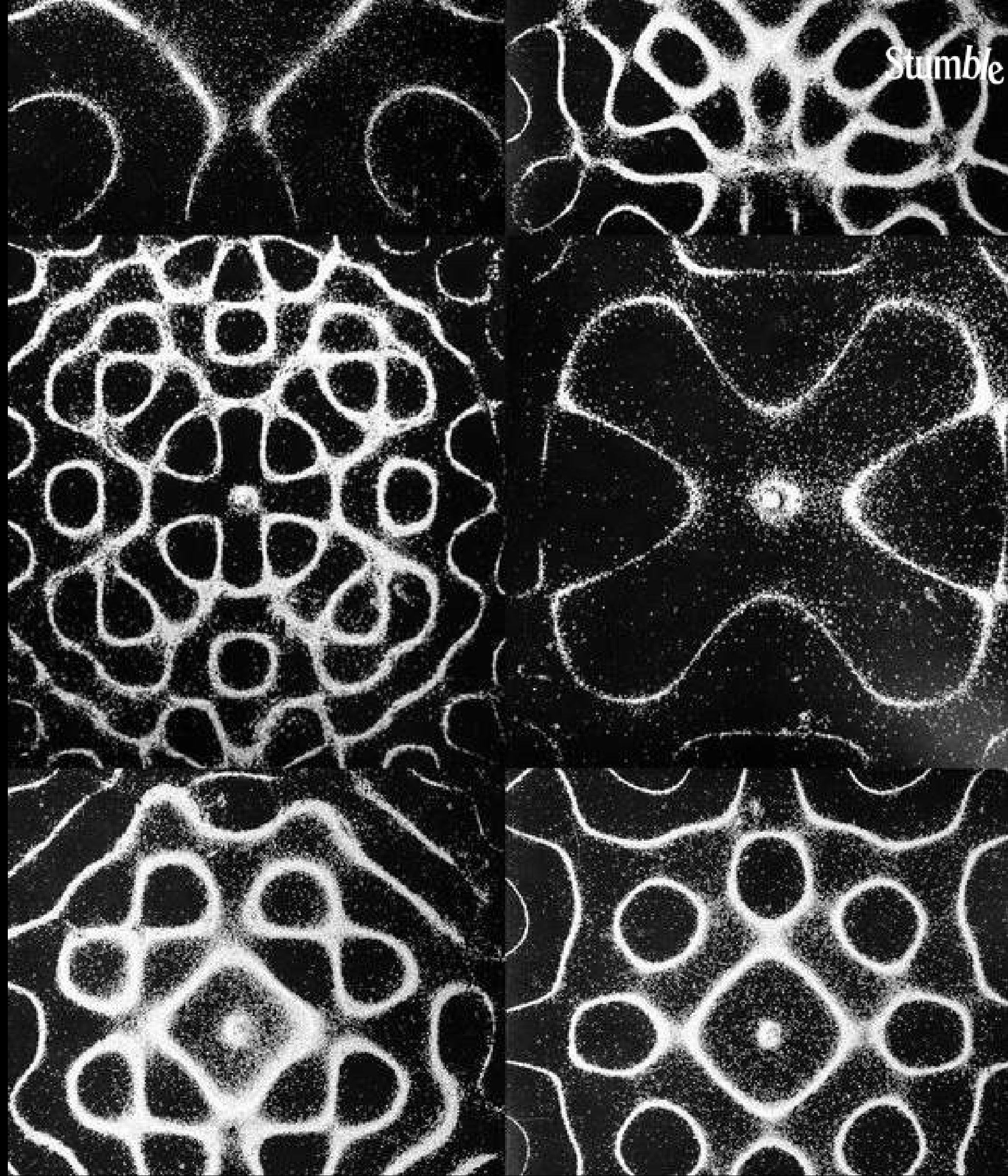
India vs Bharat?

In the creator economy. 'India' is associated with monetisation and targeting English-speaking, Tier 1, upwardly mobile audiences, as well as niche segments like start-ups, finance, and businesses. In contrast, 'Bharat' is aimed at gaining fame, potentially indicating a focus on reaching a larger, broader, more mainstream audience. Increasingly, companies and brands are evolving a **hyper-targeted communication approach** than a standardised strategy. The rise of Indian Exceptionalism means that catering to the country's masses first and then scaling with global aspirations is a viable strategy, keeping brands hyperpersonal and hyperlocal during their growth phase with regional sensibilities in mind.

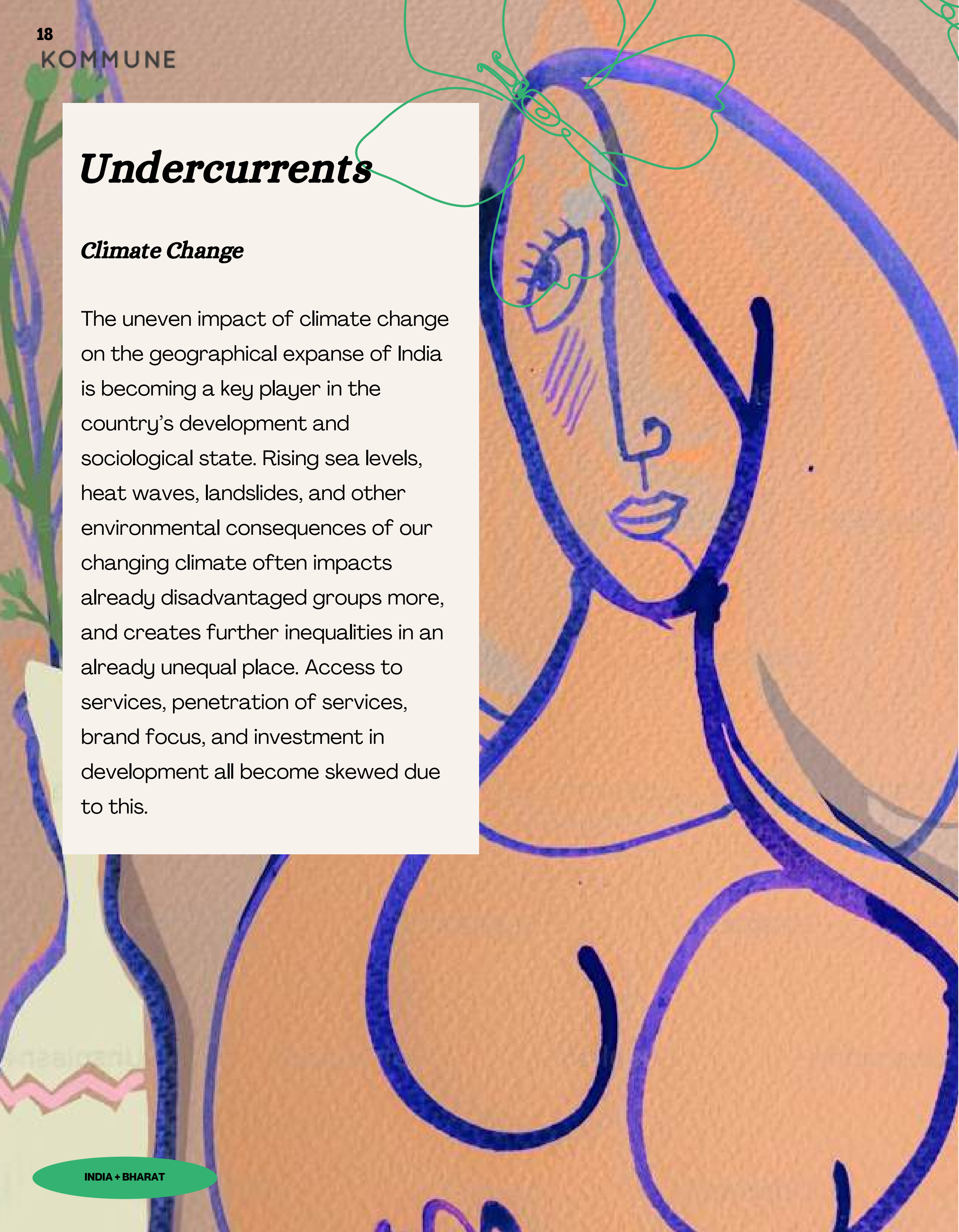
Sachet culture is bound to proliferate as audiences of Bharat consume and are willing to pay for content which is bite-sized, easily accessible snippets of entertainment and information.

Many nano influencers recognise the plurality of the population and the diversity of pockets that exist in the country, and brands are tapping into their spheres of influence. **Authority, expertise, and creativity can come from decentralised sources.** As the playing field levels and notions of hierarchy between India and Bharat are dismantled, how can brands position themselves as peers to varied audiences without alienating others? By highlighting local voices and faces for campaigns and picking up on hyperlocal issues, brands can engage more directly with their consumers' reality, giving rise to **Pincode Core.**

- ***Namma Yatri, an app-based ride-booking service launched by auto rickshaw associations in Bengaluru is an example of super-specific building for Bharat done right. The same app is now also launching as Yatri in Delhi. Combining identity harvesting (auto drivers who were exploited by ride-sharing giants), and an understanding of the ground reality of India/Bharat, the app quickly became a success.***



Brands need to be aware that a one size fits all solution is not feasible while building for India + Bharat.



Undercurrents

Climate Change

The uneven impact of climate change on the geographical expanse of India is becoming a key player in the country's development and sociological state. Rising sea levels, heat waves, landslides, and other environmental consequences of our changing climate often impacts already disadvantaged groups more, and creates further inequalities in an already unequal place. Access to services, penetration of services, brand focus, and investment in development all become skewed due to this.

Mainstream++ :

It's been three decades since Doordarshan's monopoly was replaced by conservative saas-bahu narratives of Indian television. Since then multiple platforms have emerged giving opportunities to many stories to find their place in the sun. Consumers are seeking platforms that resonate with their worldview. Besides the Netflix-Amazon-Hotstar triage, dozens of local players cater to smaller regional language markets, where numbers swell. A diversified platform marketing portfolio, would help both creators and brands reach audiences beyond the metros. However, this representation needs to be well-done, not as tokenistic as we see in cases of Desi Baiting: where international players reference Indian films, music, food, and more, in a transparent aim to get engagement from the desi audience

The rise of independent journalists and news organisations online, bolstered by public truth-seekers that are turning to new sources of truth to confirm their identity and beliefs. Decentralised media systems mean that there's less tolerance of broad narratives, fuelling expectations for businesses to understand and reflect individual experiences back to engaged audiences.

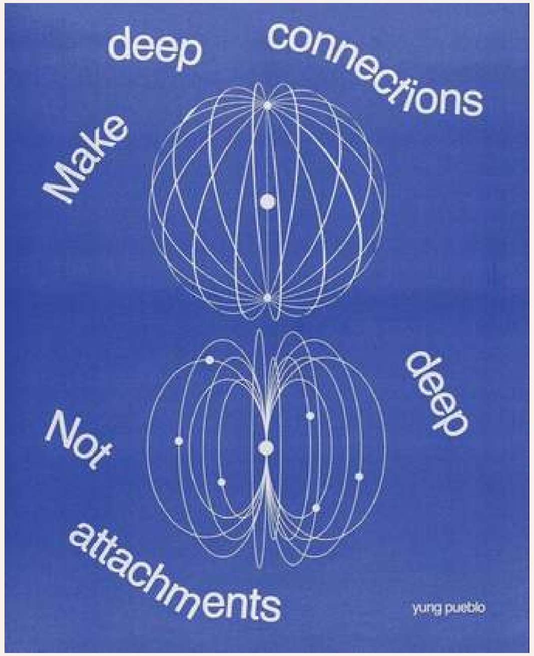
Reverse Migration

A movement boosted by the pandemic, the population of younger urban workers is slowly making its way to tier 2 cities and towns. Digitally-enabled lifestyles and remote working has pushed this reverse migration, along with more infrastructural development in villages, and rising pollution and cost of living in cities. Reverse migration changes the population graph of the areas where these new migrants settle, which in turn changes the consumer profile of that region.

Brand spotlight

In the recent past, no brand has captured all elements of building for Bharat as essentially as Reliance Jio. Based on some core insights, such as India having the world's highest mobile data consumption rate, while grappling with challenges like network congestion, slow speeds, and connectivity issues, specially in smaller towns and villages, Jio first dropped as an internet service provider. The company attracted customers with super cheap rates, bonus data offers, free minutes, discounts which encouraged friends and family to purchase Reliance Jio devices and services.

Not just restricting themselves to the internet, Reliance Jio released JioBharat as a 4G-powered feature phone that could help address connectivity challenges experienced by lower-income Indians who still use 2G services. Retaining the familiarity and cheaper price point of feature phones, JioBharat appealed to mobile phone users who value essential functions and positioned itself as instrumental in the Indian government's Digital India Programme.



Jio has heavily leaned into Indian Exceptionalism by tying themselves to the government's Make in India initiative.

Jio also further expanded their ecosystem to entertainment streaming services, music streaming, news, payments, storage, and more. Becoming a super conglomerate in the digitalscape, they provided customers across India an ecosystem to fulfil all their needs. Leveraging local faces, languages, and geographical insights in their advertising, Jio has also heavily leaned into Indian Exceptionalism by tying themselves to the government's Make in India initiative.

Jio has continued to find multiple touchpoints with all the identities of India. For example, their streaming service has the IPL, exclusive HBO original content, and a large variety of vernacular films and shows. By targeting all segments of the many Indias, they have managed to become a heavily-used service and a household name.

Mega trend three

Compulsive Convenience *vs* Conscious Consumption

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Keywords:
Spending Spiral, Quick Commerce, Accountability, Value per Rupee, Access, Hyperlocal, Sustainability

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Being able to purchase anything with just a few clicks and receiving it in the blink of an eye is a great power. But does **our current convenience-cocooned mainstream** come with great responsibility as well?

India's open-armed embrace of quick commerce, combined with the global rise of consumerism as a coping mechanism, has created a unique reality here—one where urban young adults are enveloped in **spending spirals, quick complacence**, and unwise shopping habits, all while feeling the brunt of environmental, financial, and social crises. This impulsive impasse gives rise to the tensions encapsulated in the trend of Compulsive Convenience v/s Conscious Consumption.

There is growing **cognitive dissonance** between what we know to be good — sustainability, and what we do – rampant consumption. As indulgence-first mentality is making overconsumption easy, it's also preventing sustainability-led lifestyles and cultures from taking hold.

Urgency culture, such as same-day delivery, also creates a burden on delivery drivers and the labour who support such systems, creating further exploitative cycles.

Consumption in the age of the internet brings with it other problems – such as fleeting brand loyalty, communities built around consumption, and signalling through purchases.

However, pandemic-induced introspection and frequent climate incidents since have accelerated a **societal shift towards aware and responsible living**. Global and local policies have also paved the way for sustainable practices on a systemic level. Demand for sustainable solutions, mindfulness, and a deeper connection with the environment is consistently rising. There's a growing emphasis on ethical consumption, renewable energy, and environmental stewardship. In the process, consumers demand **accountability** from stakeholders on harbouring sustainable structures of balance – be it employers, brands or governments.

About **52% of Indians** in urban areas expect to spend more on sustainable brands in the next three years.
Bain & Company, 2023

15% of Gen Y and Zers in India say that all their purchases are for sustainably-made goods.
Credit Suisse Research Institute, 2022

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Credit Suisse Research Institute, 2022

The average monthly transacting users of quick commerce still stand **at 1/3rd of online food delivery** and 1/4th of online mobility in 2024. GenZs and millennials residing in cities like Bangalore, Delhi NCR, and Mumbai continue to be the flag bearers of this category.

Loyalty Reframed

The sheer number of options available in the market for D2C brands today as well as ease of purchase across apps and platforms mean that consumers are increasingly open to trying out new products and services. Comparing price points across platforms and picking the best deal is a common practice – and indicates a shift in the definition of loyalty wherein **consumers are quick to shift allegiances depending on their own preferences**. In the era of fleeting brand loyalty, brands need to create multiple touchpoints with their audience to build salience. Audiences rely on algorithmic recommendations, word of mouth, trends, influencer marketing, hype and other factors to pick their purchases. Omnichannel marketing, including interactive experiences, insider deals, and community building help nurture a community of loyal consumers.

Mokobara, which makes new-age luggage, represents a new category of challenger brands who have created their own consumer base primarily consisting of younger people. Carving a space in the niche of aspirational luggage, Mokobara deployed omni marketing strategies, while testimonials on social media and word of mouth helped it gain popularity. Mokobara is now trying to become accessible with more SKUs across various price points as well as tangible experience centres with brick and mortar stores.

Gen Z appreciates transparency and authenticity in brands, and even as people are becoming accustomed to existing in a hurried culture, the compression of time and one-click access to everything have them contemplating a slowdown. 'Slow', 'handmade,' and 'crafted' products have a sense of **humanity and personalisation** to them, and tactics such as limited edition, one-of-a-kind, and product 'drops' manufacture desire for the product as well.

Outsourced Accountability

Taking a step back from trend-driven consumption, brands can generate timelessness through products pegged to emotions, nostalgia, joy – infusing more intangible, perceived value into their offerings: **Product EQ.** Brands such as Phool are also leading the way in providing customers zero-waste alternatives and making it their USP and ethos.

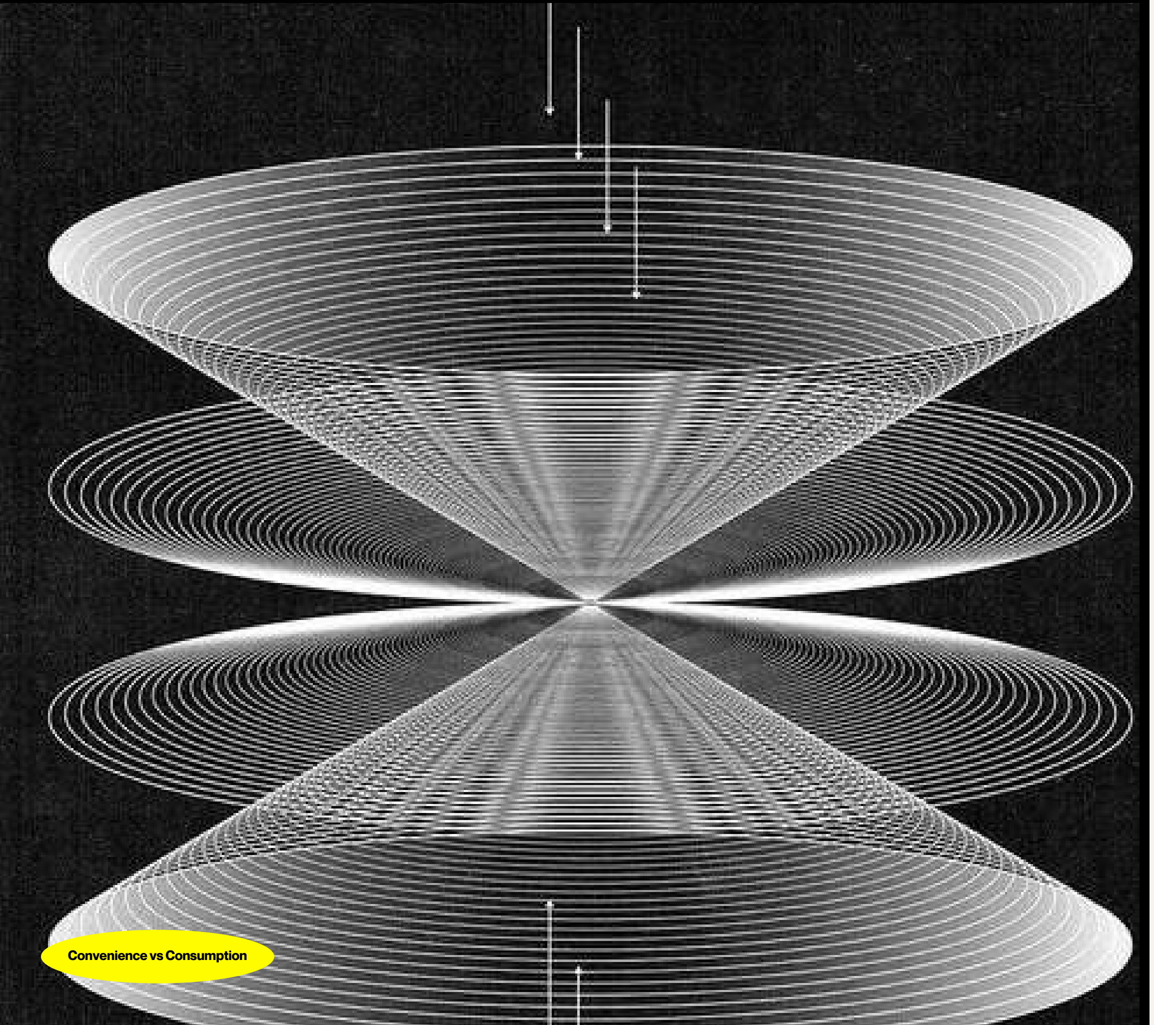
Brands intentionally leveraging Intentional Friction to curb the consumerist impulses of their audience is not a bad strategy if it's enjoyable, and in the process of buying, people perceive more value. Intentional Friction can also take on a transparent, cause-driven approach in the form of opt-out donations such as that as seen in BookMyShow or opt-out sustainability options such as those in Zomato.

These place the **Outsourced Responsibility** of conscious consumption onto the consumer, but the accountability is still of the brand to have such options and alternatives in the first place. Companies could overcome planned obsolescence and be honest with audiences. This transfer of responsibility lies with the corporations and brands, and the availing of the options is the onus of the consumer.

Delivery apps and quick commerce services such as Dunzo and Swiggy have all introduced the option for bundled deliveries, wherein users get their products slightly later but in fewer trips/boxes/deliveries. By making this an opt-in option, these providers offer the user a choice that may otherwise not even occur to them – do they really need their order NOW or would they be willing to receive it slightly later? The control lies with the user.

Experience Hunting

During the 2010s, the idea of 'buying experiences, not things' felt virtuous and wise— after all, things make one materialistic while experiences ostensibly teach and enrich. Today, the distinction between buying and doing is less binary than it used to be – we can treat experiences like disposable objects, rotely marching through a holiday just for Instagram posts, and building communities of experience consumption. In fact, we hardly see things and experiences as different at all.



Communities and fandoms are now often centred around consumption – skincare fans accumulate products, sneakerheads purchase shoes by the dozen, and BookTok and Bookstagram are encouraging 'hauls' of books. Synchronously, an **equivalency of experiences and things** mean that there is a desire for accumulation of experiences – going to every music festival, trending restaurant, and travel destination. Millennial minimalism has evolved into **post-millennial materialism**, often driven by post-pandemic revenge purchases and urges. People also seek to signal their taste through their consumption, and are willing to curate their life through commodification of experiences. Experiences hence become the conduits of personality curation.

This comes in parallel to Airplane Mode, where people seek offline experiences due to screen fatigue – **both indicative of a larger preference shift towards tactile, IRL community-based engagements.**

AirBnb introduced their 'Icons' service in May 2024, where guests can be part of experiences hosted by celebrities and in iconic locations. These include staying in a detailed re-creation of the balloon house from Disney-Pixar's Up, enjoying a living room performance from Grammy-winning artist Doja Cat, and being personally hosted by Janhvi Kapoor in her home in Chennai.

Undercurrents

Spending To Fit In

An increasing upgrade culture where people take **lifestyle creep for granted**, aspire for products and experiences outside their spending capacity, and aim to accumulate more of everything, conveniently, a credit boom is inevitable. Schemes such as buy now, pay later (BNPL) and EMIs, earlier reserved for big-ticket buys such as cars and homes, are now being used for even non-milestone purchases such as phones and luxury items. **Spending for signalling** is leading to younger consumers falling into spending spirals, not using credit cards wisely, and unwise expenditures. Even with financial literacy and investing at an early age becoming more common, the **credit boom** is bound to suck people in.

Money Isn't "Real"?

Convenience-based consumption is driven by convenient spending, such as the ease of digital payments in urban areas through digital modes like UPI. This will only get exacerbated over time, as ambitious visions about the Finternet become mainstream When money is perceived to be digital, and spending is frictionless, it becomes **harder to keep track of spends and becomes easier to overspend or to surpass budgets.**

Auto-debiting for subscription-based services means that smaller and automated transactions become easier to commit to, and then they add up. Lack of physical handling of money (when was the last time you withdrew cash from an ATM?) **removes friction and feelings of satiety**, and push us into spending more, and more often.

Access Divide:

Estimates suggest over 80% of the world's population currently owns a smartphone, with almost 60% of the global population actively using the internet. Yet while the UN believes access to the internet should be a basic human right, it's something nearly 3 billion people lack. Many experts believe that by 2025, one segment of society will live in a 'tele-everything', profoundly digital world, while on the other side of the digital divide, those with less access to technology will fall behind and suffer **increasing economic consequences.**

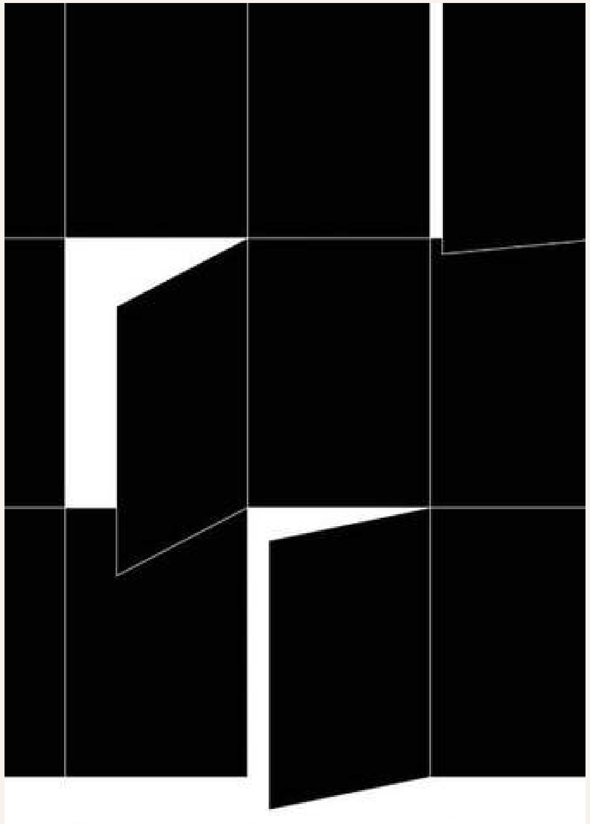
This **deepening digital divide** is clearly visible in India, wherein urban areas are digitally and infrastructurally developed and connected, while rural areas lack advancement on those fronts. We see this in the way buying and shopping pans out, with urban tier-1 towns already being well-connected by hyperlocal delivery services and quick commerce apps, while tier 2 and other areas remain dependent on physical stores such as the quintessential kirana store.

As the **hyperlocal tastemaker,** kirana stores have long governed what consumers purchase – depending on availability and price. Now increasingly replaced by apps and digital services in cities, the store still exercises impact, lending a human touch to an otherwise literally transactional activity. Traditional buyers and those wanting to contribute to the local economy still may favour these stores, too. Brands can make an effort to reinforce such local, physical mediums of consumption by running in-store campaigns.

Brand spotlight

Ather Energy, one of the first EV startups to focus exclusively on scooters in India, has been regularly in the news, not just for their innovative products and research-centric operations but also for integrating easy sustainability into their offerings. With tens of lakhs of sales in India and plans for international expansion, the brand is paving the way for making eco-friendly products cooler and accessible. According to Rest of World: 'Before Ather, electric two-wheelers in India were largely Chinese imports that had less power, lower capacity, and were slow-moving, according to Ravi Gadepalli, an independent expert on electric mobility and public transport who works as a consultant with the Asian Development Bank. He told Rest of World that Ather has brought in product design innovation, sleek design, and "the kind of vehicle which is closer to what the Indian market wants."' With parking assistance, the ability to charge devices on-the-go, and a screen that can showcase WhatsApp notifications, many of their latest offerings are catered to exactly what an Indian consumer may need.

Moreover, Ather's website not just cleanly showcases their products but also features a dedicated 'community' section where users can interact, sign up for product previews, and even listen to curated Spotify playlists.

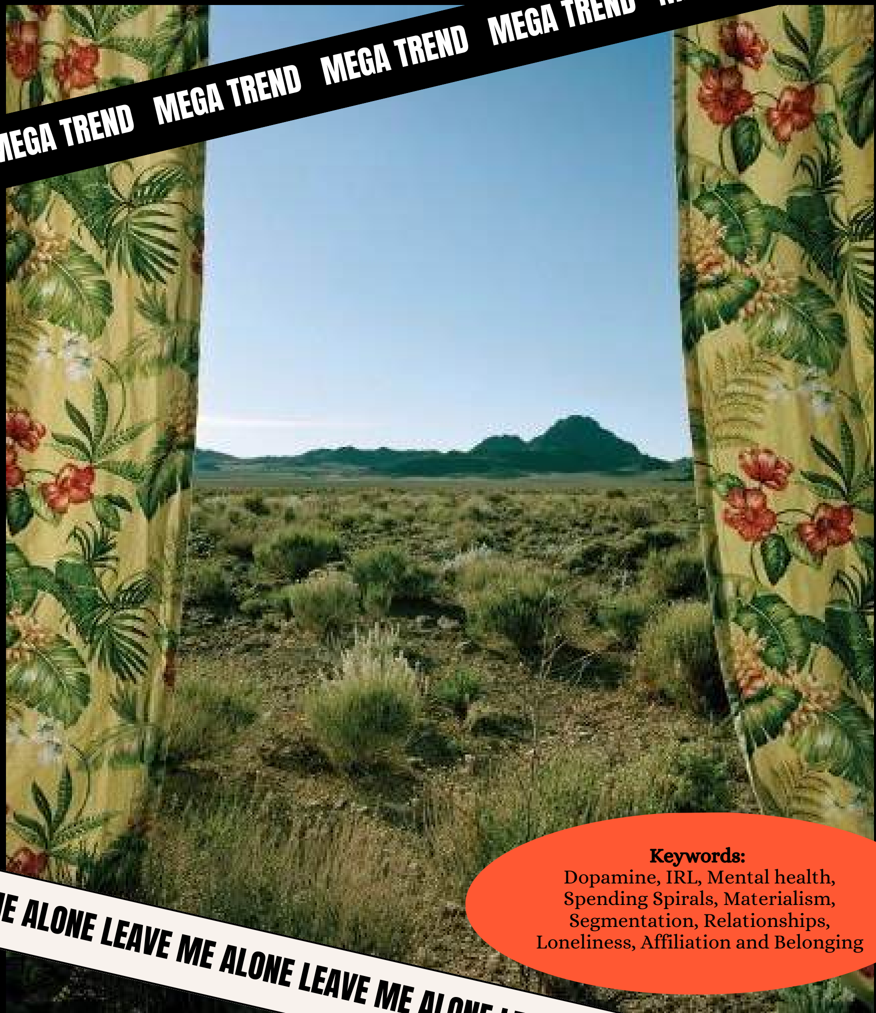


Many of the latest offerings by these new brands are catered to exactly what a modern Indian consumer may need.

They also have an active YouTube channel, with vlogs, FAQs, and event updates. Their USP is their focus on research – having spent the first few years of the company's existence on R&D alone and now in possession of hundreds of patents – as well as on building community.

Another new-age homegrown brand making news is Beco. Focusing on younger consumers seeking sustainable alternatives to daily-use household products, Beco manufactures paper towels, garbage bags, toothbrushes, dishwashing liquids, detergents, floor cleaners and other essentials, providing eco-friendly options in the domestic consumables category where they are hard to find. With reusable products and relatively lower price points, Beco has found a gap in the market and heavily pushes their natural, plant-based ingredients as a USP.

Mega trend four
WORLDS OF ONE



Keywords:
Dopamine, IRL, Mental health, Spending Spirals, Materialism, Segmentation, Relationships, Loneliness, Affiliation and Belonging

Navigating reality has become an almost constant shock to the system. With rising cost of living, wars, political polarisation, crumbling trust in governments and social systems, and the environmental crisis, life's stresses are becoming increasingly difficult to escape. With individuals and collectives in a perpetual state of disturbance, people are increasingly seeking reprieve from this **permacrisis**.

Constructing a permanent refuge through individual world-building, people are now creating their own Worlds of One. Used to the personalisation offered through social media algorithms, consumers now seek to have a similar ease in real life by curating their own lives – choosing experiences, products, brands, friends, relationships, careers, and feelings that feel as personalised and convenient as possible.

This retreat into oneself has a darker side. **Loneliness** is now a public health concern across the world, and with pandemic trauma lingering in the collective consciousness, people feel disappointed that a more utopian 'new normal' never materialised. Disillusionment and disenchantment with reality is causing ripple effects in how people now engage with the world around them, creating new tensions and contradictions. Our world of one is also simultaneously coexisting with desire for more connection and community. Younger people are ready to embrace '**ugly feelings**' like envy, irritation, paranoia, and rage as a way of coping, as reflected in **abstract, nihilistic Gen Z humour.**

The '**personal brand**' of each individual is the public encapsulation of their world of one, but people are also increasingly seeking personal moments and closeness in their digital and real lives. Toggling between performative authenticity and authentic performance, many people are experiencing a deep unease around truth, reality, and their role in the world. Are we content generators for a voyeuristic machine or feral club rats seeking to embrace our most animal selves? Amid individual, technological, and geopolitical existentialism, people are looking to businesses to help them define and express their 'truth'.

India has **659 million smartphone users** i.e. 46.5% of its population.
Sources: Statista, Newzoo, OuterBoxDesign

At 31 GB per user, India is currently consuming the **highest data** per smartphone user in the world.
Ericsson Mobility Report 2023

India was home to **467.0 million social media users** in January 2023, equating to 32.8 percent of the total population. Among these social media users, in early 2023, YouTube had **467.0 million users** (Google's advertising resources), Facebook at **314.6 million users** and Instagram at **229.6 million** (Meta advertising tools).
source: Digital 2023: India

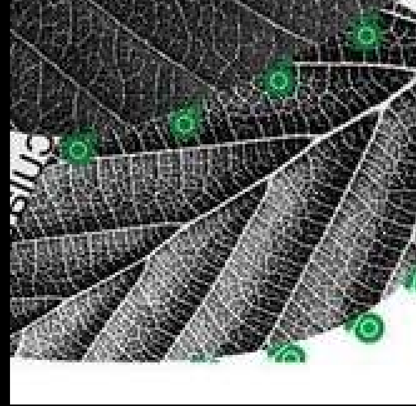
A total of 1.10 billion cellular mobile connections were active in India in early 2023, with this figure equivalent to **77.0 percent of the total population.**
Source: Digital 2023: India

Everyday Empathy

In the face of economic crises, climate anxieties, and global wars, people are seeking solace through connection. They want to be sure someone will hold their hand in the face of hardship. As a result, they have higher expectations of care and understanding from interactions with brands, social systems, and people. Many no longer see emotional intelligence as a pleasant add-on – it has become a default expectation. As loneliness becomes pervasive — people are prioritising **companionship, community, and understanding** as a bedrock of resilience in building a more empathetic and interconnected society. What's more, they aren't afraid to turn to technology to fill the void, engaging with AI chatbots for emotional gratification as much as practical services.

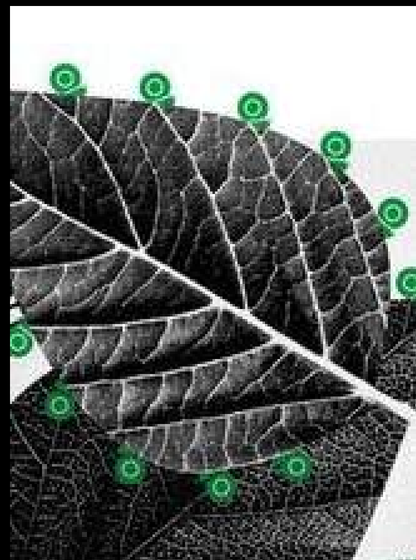
Cosynets — online spaces characterized by intimacy, comfort, and authentic expression are becoming havens of solace. From unfiltered content by creators to candid close friends' stories, we crave these cozy connections and emotional safety. They foster a network of unfettered interaction, serving as an antidote to the overwhelm of constant connectivity.

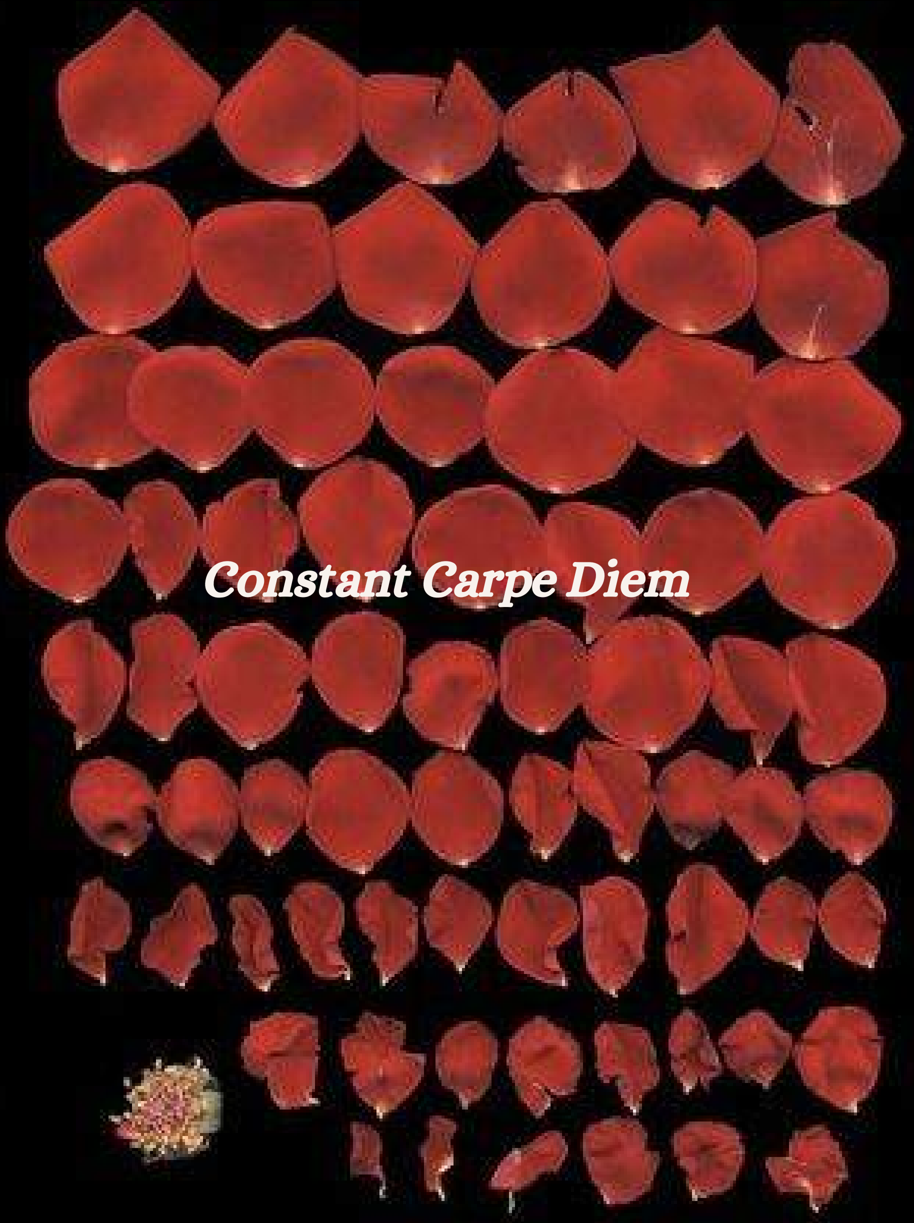
The very notion of care is in flux. In this context, people are turning to brands and public figures for a helping hand, and are also seeking out content that strikes an emotional chord.



The need for empathy in content can be seen in the kind and nature of content choices made by consumers. Empathetic, healthy masculinity is discussed by host Nikhil Taneja with his guests in the award-winning podcast Be A Man Yaar.

Zakir Khan's Tathastu is officially a comedy special but is really so much more, giving the audience a vulnerable account of his life. Its resounding success serves to show that there is a huge demand for well-done, empathetic content.





Constant Carpe Diem

The post-lockdown, inter-pandemic, and digitally saturated world now has people longing for more. Whether you chalk it up to techno-optimism or a general sense of impending doom, people today are looking for a new maximalism of feelings, dimensions, and possibilities to reinvigorate them and make their lives feel full. 'Life is short' has always been a platitude, but people are aware that ours may be even shorter. This is giving rise to a constant **'treat yourself' mentality** where people are searching for small joys, treats, and momentary pleasures that allow them to appreciate their day-to-day lives, and are reassuring themselves that they deserve it.

Smaller luxuries, an increased focus on comfort and self-care, and more affordable collections by higher-end brands play into this trend of constant carpe diem.

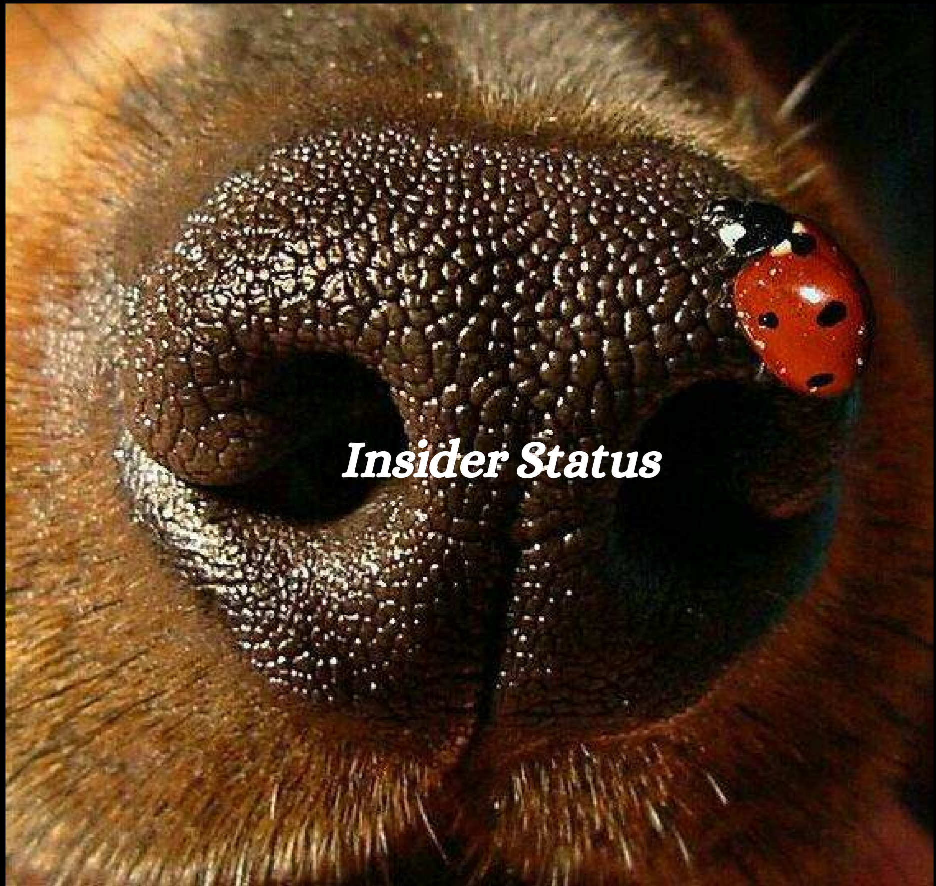
Brands can help people create and cherish these moments of reprieve by positioning themselves as supporters in the chase for self-satisfaction.

Customisation By Default

Once a signifier of luxury or elitism, custom products are now within reach of the everyday consumer. With algorithm-led platforms, COVID-era digitisation boom, and rise of artificial intelligence, everyone wants to be the **main character of their brand experience**. Consumers are channelling their need for convenience and self-expression into anything from bespoke lipstick built with the help of AI to tweaking home electric appliances to be 'just so.'

Our penchant for personalised playlists, meal plans, and shopping experiences have played a pivotal role in mainstreaming the tendency towards customised products and services. But in the years ahead, this behaviour will be defined by Gen Alpha, the world's first **'personalisation native'** generation, which is already exposed to the 'personalised reality' shift that allows this cohort to tailor entire virtual worlds and learning experiences to their unique needs and wants.

MG Motor India collaborated with Indian gamer MortaL (real name: Naman Mathur) for an EV in 2023. With MortaL's input in the design of the vehicle and him playing a role in the marketing. MG not only emphasised their tech-first outlook but also handed over more customisation powers to the consumers, as the car comes in a variety of colours and features which can be personalised giving rise to a multitude of iterations the car could take to best reflect the consumer's identity.



Insider Status

In a hyper-connected world, everything previously 'insider' feels more readily available for aam aurat's consumption — from behind-the-scenes access to the lives of public figures to travel experiences immersing people into worlds previously deemed unattainable. But while people embrace this community-based inclusivity and unprecedented access to their icons, they still **yearn for touches of exclusivity to define their status.**

Previously held definitions of exclusivity evolve, people are redefining status for themselves using a broad range of factors beyond solely economic ones. This new iteration of status is often based around increasingly niche and local signifiers – from **superfan culture**, wherein long-term active fans of an artist are given prioritised access and deals, to the rise of **members-only clubs and closed-community spaces b**ased on shared interests. **Status is becoming a mode of belonging and connection** with like-minded people.

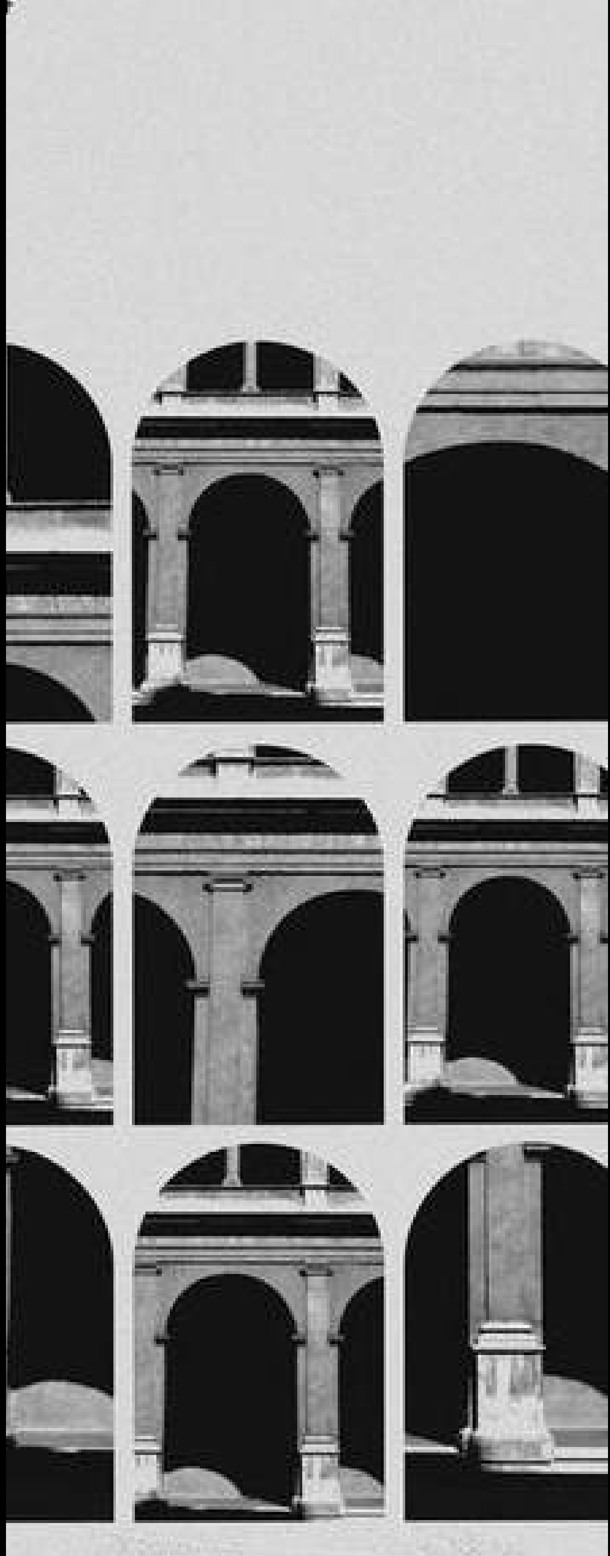
- ***Soho House Mumbai, an international members-only club for artists and creatives, has become the hub of exclusive arts events in the city, providing a space for closed, community events to be held.***

- ***Indian coffee culture is also evolving, Indians are now willing to pay more for quality coffee, a change that has come thanks to artisanal micro-roasters and international coffee brands who have helped foster a community of coffee drinkers here. Brands across different industries are leveraging the coffee trend to introduce new products, create unique consumer experiences, and engage with a young, modern demographic. Events are now being held in outlets, chains such as Subko have their own culture division, and tasting and other coffee experiences are becoming common.***

Undercurrents

Embrace the unhinged

Led in large part by Gen Z's appetite for irreverence, **responses to permacrisis look increasingly unconventional.** With 'out there' content proving a relatable touchpoint for many people, brands can help audiences escape by **leaning into the unhinged and embracing their anti-hero energy.** People are acutely aware that reality is not always sunshine and rainbows – certainly not for most people – and are finding freedom in the unhinged by embracing new levels of honesty about mental health. 'Yearnposting' reflects a more deliberate engagement with anxiety and dissatisfaction, while others are opting for **off-the-rails candour or just dissociating completely**. Meanwhile, trends like 'feral girl summer', 'bedrotting', and 'goblin mode' have seen people construct new lifestyles and outlooks for themselves – because reality doesn't cut it.



Abstract, absurdist memes such as Ganji Chudail, level sabhi ke niklenge, and the recently-popular baingan indicate people finding catharsis and escapism in the unhinged, something brands can also capitalise upon to build their community.

Prosumers

At the sharp edge of personalisation are 'prosumers': people who don't want to be consumers in a passive way, and instead seek self-expression through a DIY mentality. Think hardware hackers, bike customisers, and even those beating Zoom fatigue with bespoke avatars. These prosumers set trends, pave the way for deeper engagement with products, and are a great way for brands to seed their offerings to the general public through their highly-engaged communities.

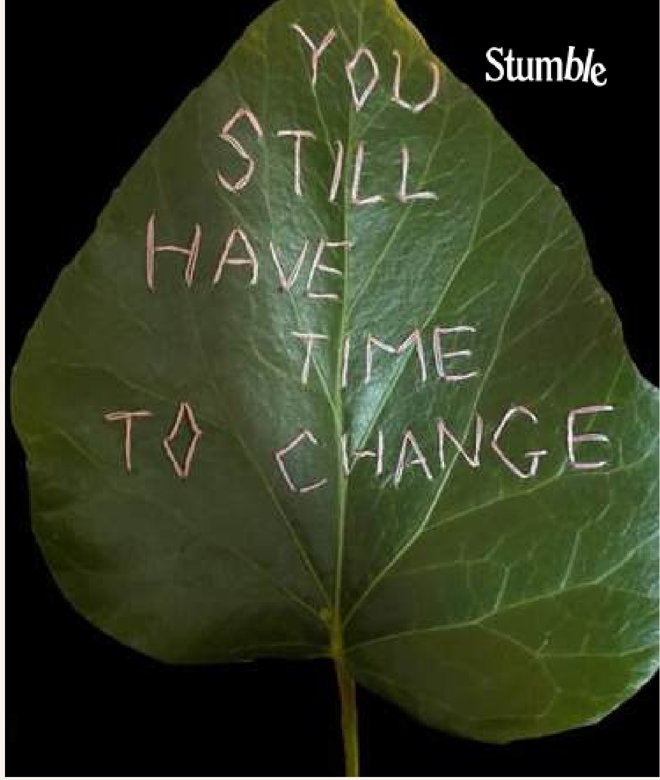
Loneliness

Worlds of One can, by definition, get lonely. Gen Z and Gen Alpha are showing rising rates of loneliness, often linked to pandemic-driven isolation, increasing screen time of younger generations, increasing cost of living and hence more demanding work life, loss of third places around the world to name a few. Communities, relationships, and interpersonal interaction moving online can also give rise to more **low-touch and almost transactional relationships**, which do not fulfil our social needs, leading to a populace that is constantly yearning, touch-starved, and insecure about their social existence. Consumers who experience loneliness often gravitate towards 'comfort content' that touches their emotional chords, such as livestreaming, podcasting conversations that feels like one is within a group of friends, wholesome memes, and empathetic influencers. They may also be more inclined to develop parasocial relationships with people they do not know, since many of their relationships exist in online spaces.

Brand spotlight

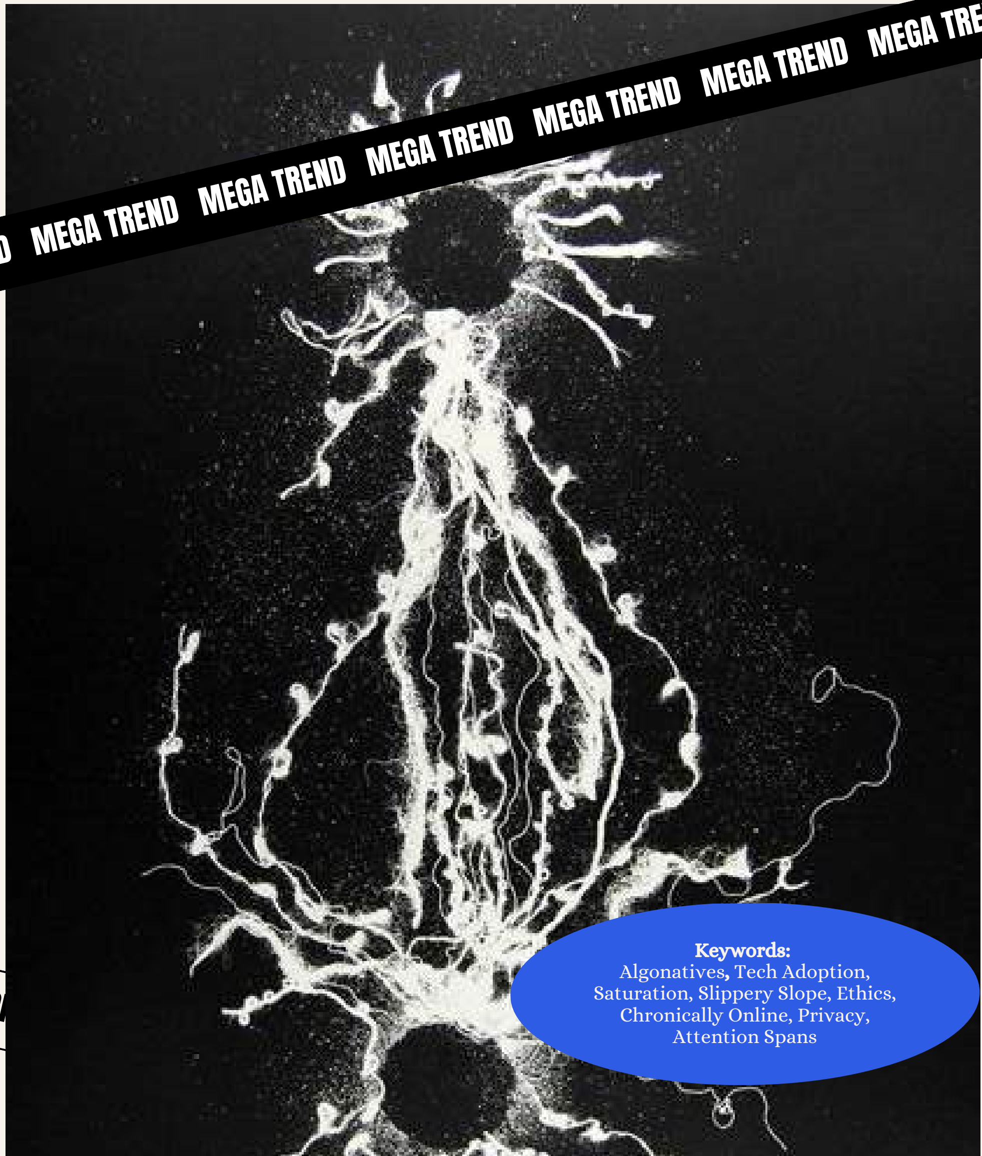
Duolingo's rebrand from a language learning app to a deranged, hyper-online, and irreverent tone personifies Gen Z humour. Their mascot, a neon green owl named Duo, openly crushes on Dua Lipa, disses Google Translate, and threatens to kidnap the families of those who don't complete lessons. By successful brand personification ('brand as a creator' mindset), Duolingo gives its audience a reason to follow and engage with their posts beyond just the product itself.
Content that is relatable and shareable is key for social media engagement today – nobody wants to share a brand reel about a festive offer. By embracing the weirder kinds of internet humour, Duolingo's authenticity is unique and visible across their various channels and country divisions. Duolingo India's account, for example, embodies the same unhinged tonality with a distinct local flavour. So the brand launched a campaign titled #SwachhBhashaAbhiyaan, wherein users can post photos of misspelt signboards they see and get vouchers in return. By encouraging the creation of UGC, the brand not only curates their 'insider club' but also gains wider reach and visibility.

What is more personalised than a brand mascot roasting you on social media?



The rebrand of Duolingo is also an example of authentic brand evolution – because Duo has always been known to be... pushy. Or 'persistent,' as the official Duolingo style guide states. With constant notifications to not break streaks or miss lessons, the app has leveraged Duo as a slightly creepy mascot for a while to almost guilt-trip users into finishing their courses. For many years, this behaviour of Duo has been a meme across social media platforms. Duolingo's new strategy simply leans into it, leveraging a distinctly TikTok-style humour that brands like RyanAir have also come to embody.
"The majority of our learners consist of millennials and Gen Z, and our efforts are focused on establishing a connection between Duo and these learners by incorporating entertaining and relatable content, such as memes, trends, and references to popular culture," Karandeep Singh Kapany, the Country Marketing Manager (India) of Duolingo, told Stumble. By listening and speaking to the audience, and by being unhinged but responsive, the brand's refreshing take on audience engagement appeals to Gen Z who enjoy personalised interactions and custom experiences.

Mega trend five
HUMANS,REWIRED



Keywords:
Algonatives, Tech Adoption, Saturation, Slippery Slope, Ethics, Chronically Online, Privacy, Attention Spans

Humans, Rewired

Everything is technology. Our work lives, our romantic lives, our friendships, our health records, our payments, our travel history, our shopping habits, our education... everything is now encapsulated in systems of software and hardware. While the digitisation of life has been in motion for decades, the impact of these **blurring boundaries** between humans and digital technologies is slowly emerging now in a series of **psycho-social and physiological consequences.**

Technology is rewiring our sense of self, our work and relationships, impacting us inside out. Reducing attention spans, hyper-awareness of the self due to the proliferation of wearable tech, the inability of logging off entirely, the struggles of maintaining work-life balance are some ways in which humans are integrating more deeply with tech.

Technological advancements such as Artificial Intelligence, Augmented Reality, and Virtual Reality, relentlessly destroy old ways of working – such the way we write and make content, how it's distributed and consumed, and how content is perceived and experienced. What remains and is continually honed is efficiency and time.

As boundaries between human and digital continue to blur, creators, brands and consumers are using tech innovations for everything – from imagination, to education, to structural reconfiguration – also throwing up **profound questions around authenticity, ethics and existing disparities.**

A Microsoft and PWC report highlights that **AI used in sustainability-related contexts** could add up to $5.2 trillion USD to the global economy in 2030

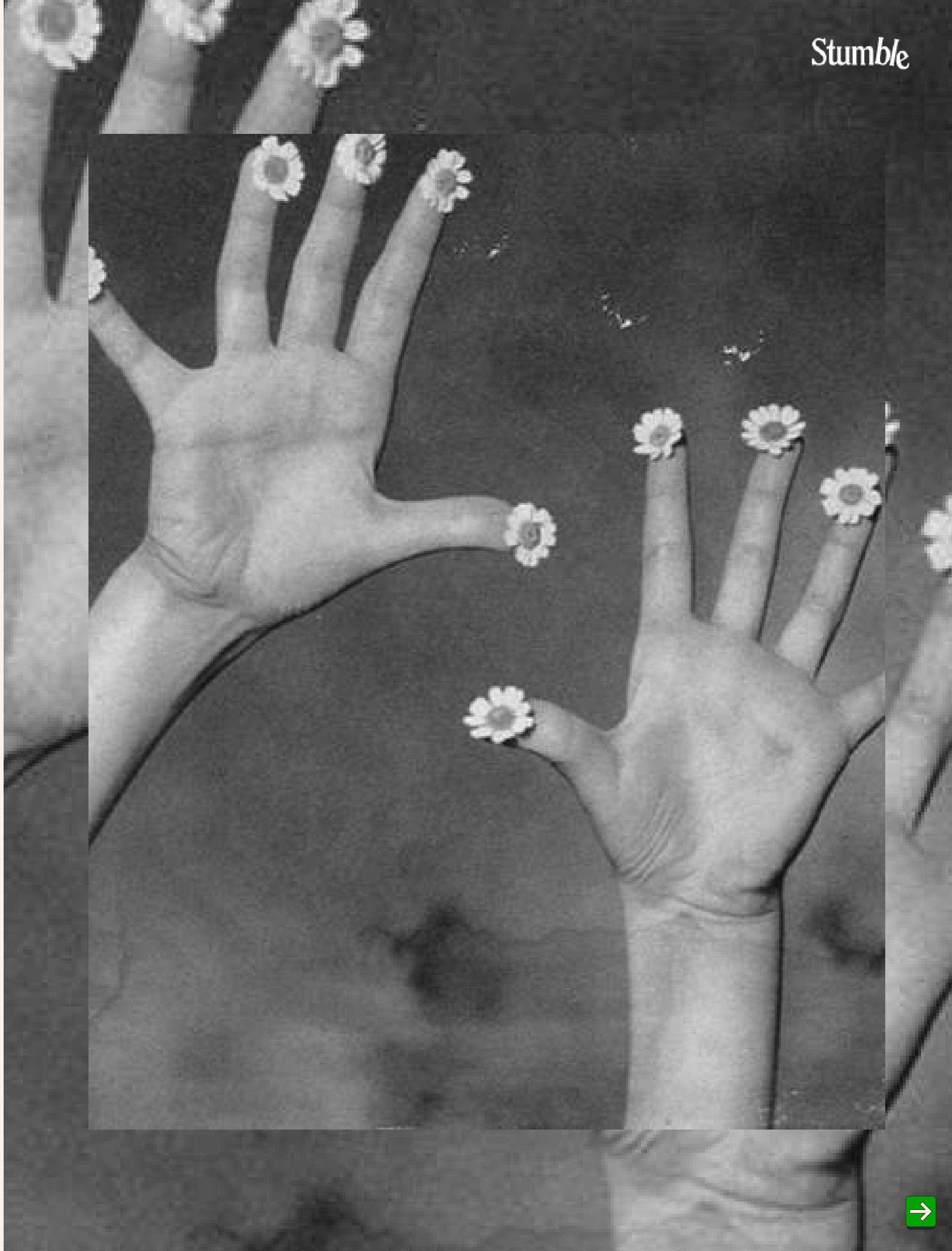
The spending on dating and friendship apps also doubled to $9.9 million by December 2022 compared to the year before at **$4.5million.**
App Annie, 2023

About **82.4 million Indians** use dating apps in 2024, compared to 20 million five years.
E-harmony, 2024

More than **65% of elderly Indians** in a survey said they felt lonely as the youth rapidly adopt new tech
PAN Healthcare, 2022

Algorithmic Attunement

Gen Alpha and late Gen Z are fundamentally different from the generations that came before them, because these groups are **Algonatives**. When your formative years are puppeteered by algorithms, recommendation systems, and personalised social media feeds, the way you operate changes, and so does the way you perceive the world. Data is also showing that children's **attention spans** have worsened post-pandemic, with teachers highlighting difficulties in maintaining students' behaviour in class. Keeping Gen Alpha interested is more challenging – **requiring a rethink of our systems of education, work, and life.** Short video content and swipe-able feeds have also taken over online generations, with social media and even non-social platforms adapting to reflect TikTok. The human impact of the homogenization of platforms, for example the ways it may reshape creativity, will need study and research.



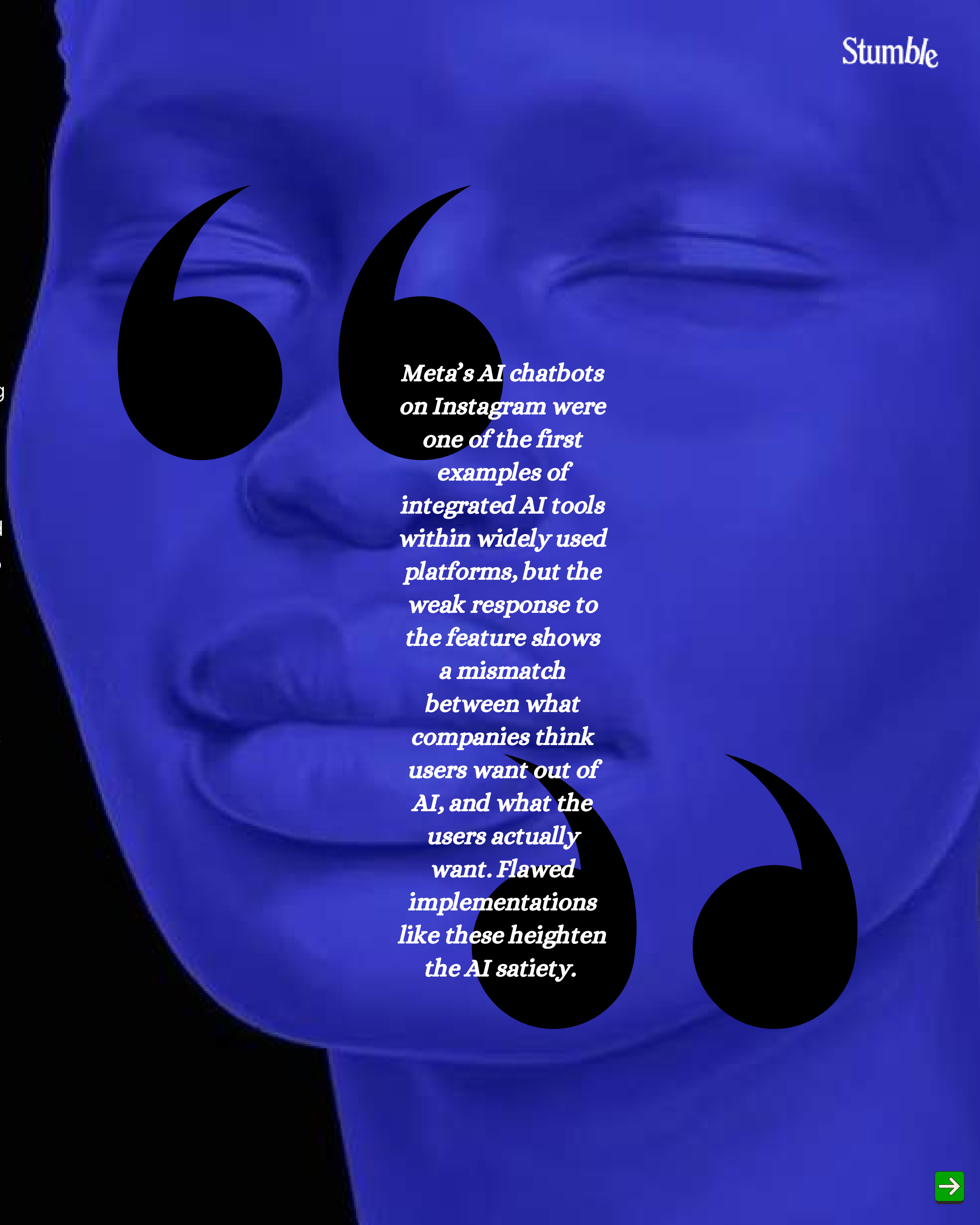
AI Normalisation

In the last couple of years, the rate of AI evolution has been immense, and often hard to keep up with for the average tech user. We have domesticated what AI we could – which is to say that we have picked what tools work for us, picked how much we want to use them, and left the more complicated stuff for the engineers and the tech enthusiasts. **AI has become a co-pilot, an assistant, or an intern for many people.** AI notetakers in meetings or Microsoft's Copilot are now the norm, and have quickly been adopted into workflows, instead of being a novelty to play with.

And a change of sentiment is also being seen – once-aspirational, the AI 'look' and tonality is something that social media users often deride: in a sense of "**Your AI is Showing**".

Brands using AI-generated images online instead of commissioning designers, or even individuals using clearly GPT-generated posts and comments, have become something to look down upon instead of something to praise for efficiency.

Larger questions still remain around AI ethics, the impact of it on the job market, and the ways in which existing power dynamics, both economic and social, will be enhanced. There is a **sense of impending doom,** and yet, we make fun of AI generated content online. We might just be procrastinating the AI apocalypse.



> ***Meta's AI chatbots on Instagram were one of the first examples of integrated AI tools within widely used platforms, but the weak response to the feature shows a mismatch between what companies think users want out of AI, and what the users actually want. Flawed implementations like these heighten the AI satiety.***

Microdosing Relationships

Social media has changed how friendships take place, where we now microdose our friendships through **soft check-ins and passive interactions** – such as sending memes to each other and reacting to them without *actually* having a conscious interaction. Our network is larger now, and we're in 'touch' with more people, but are we making active memories and getting our fill of interpersonal satisfaction? The way we keep in touch has evolved into passing around information: **Bulletin Bonding**, and we often find ourselves passively consuming the lives of our friends through Instagram posts and stories. We know everything without consciously, intentionally being *told*. We may just be in parasocial relationships with our own friends.

– The popularity of conversational video podcasts, like Untriggered, shows audience preference for content that makes them feel 'included', almost encouraging parasocial relationships in the process and boosting their own engagement.

Undercurrents

The Pain of Omniscience

We've officially reached a point when we know too much. In line with the algorithmic attunement mentioned above, we are constantly plugged into our online lives; in fact, there is **no hard separation between our online and offline lives any more.** We have access to endless information online, about whatever we may want to access, and are often exposed to data and information while scrolling that we did not consciously seek. **Information overload is real**, and can be psychologically overpowering for many people. Moreover, hardware developments in wearable tech also mean that we have access to a lot of data about ourselves, from sleep quality, to calorie counts, to heartbeat. And while we feel crippled the moment our phone is away – **nomophobia** is becoming a not-uncommon thing – our mental health is also impacted due to how hyper-aware we are of every metric about the world, about other people, and about ourselves.

Social media features such as hiding likes, mute options, and quiet mode aim to help curb this, in line with Airplane Mode and Behind the Screens mentioned before. People also seek brands that provide similar features. Society necessitates that we stay always-online, but **consumer spends on wellness products and travel are on the rise** – proving that **temporary reprieve** in our chronically-online state is a growing desire.

Decline of the critic, rise of the curator

How do we cut through the pain of omniscience? With content becoming more expansive and constant, spanning multiple platforms, the accelerating speed of communication also means that micro-trends for desired commodities and hyped behaviours come and go quickly. **Being able to keep up with the pace has become the true differentiator.** People are turning to curators – individuals, collectives, and brands – that promise to sort through the noise and make sense of the world for you.

Video essayists, film bloggers, and influencers of all kinds are helping the internet users of today get a curated feed of content and opinions that they can engage with. Curated experiences, too, are on the rise, with people wanting to optimise their travel and cultural engagement.

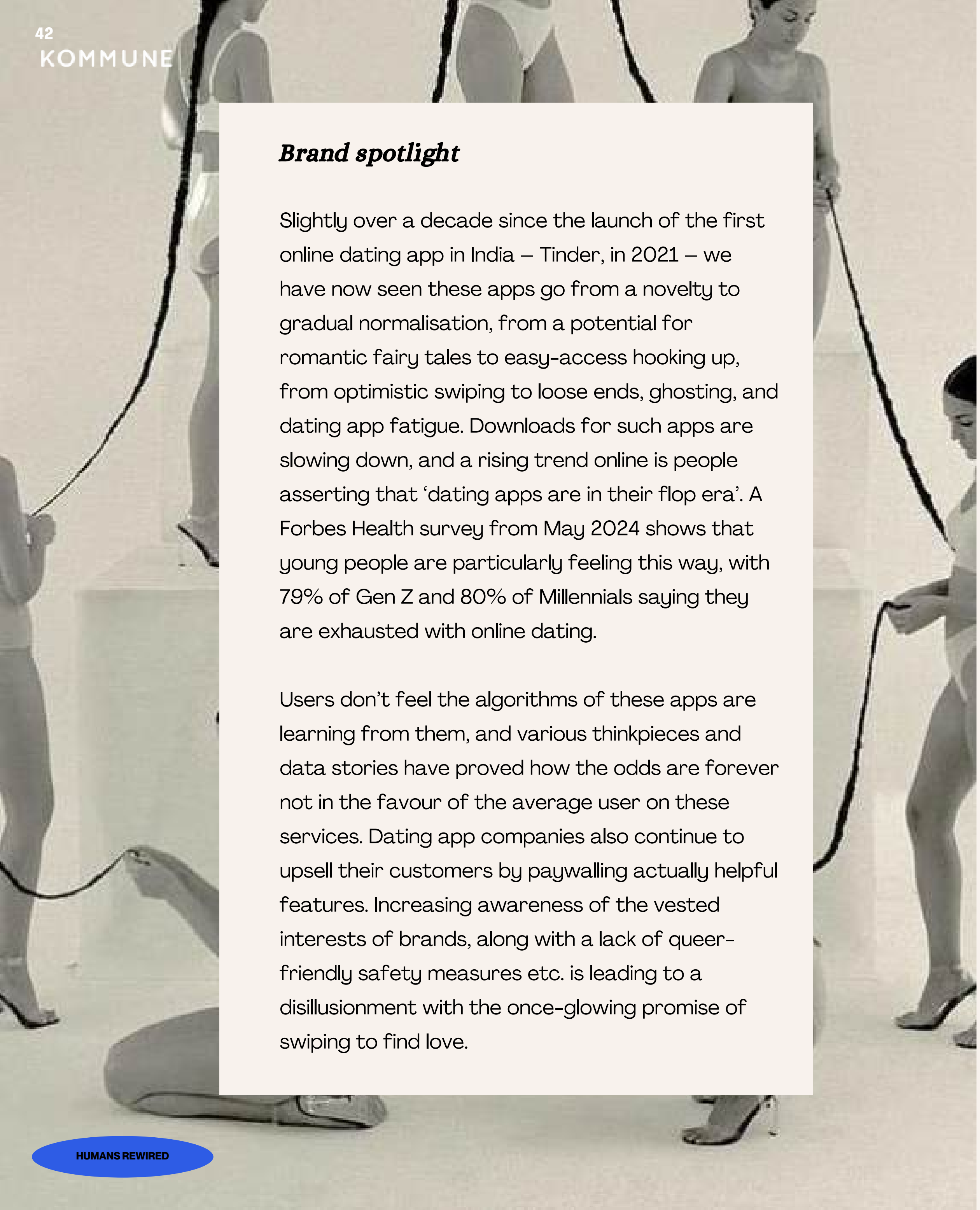
Privacy Apathy

With increasing governmental digitisation, such as UPI and DigiYatra, and subsequently rising concerns of privacy, we find ourselves at a crossroads where in a nation that is not fully digitally literate, digital integration and compliance serves to often make our lives easier.
Is privacy an appropriate cost for ease of living? Does it even matter any more? With an almost ubiquitous access by the government towards all our data built into existence itself, the **algonative generation often displays apathy towards privacy**.

The recent non-reaction to Facebook's announcement of using user memories for AI training is in drastic contrast to 2016's Net Neutrality campaign and previous public protests against mining of public data by private corporations. How have our attitudes changed so much, so quickly?

Analog Dialogue

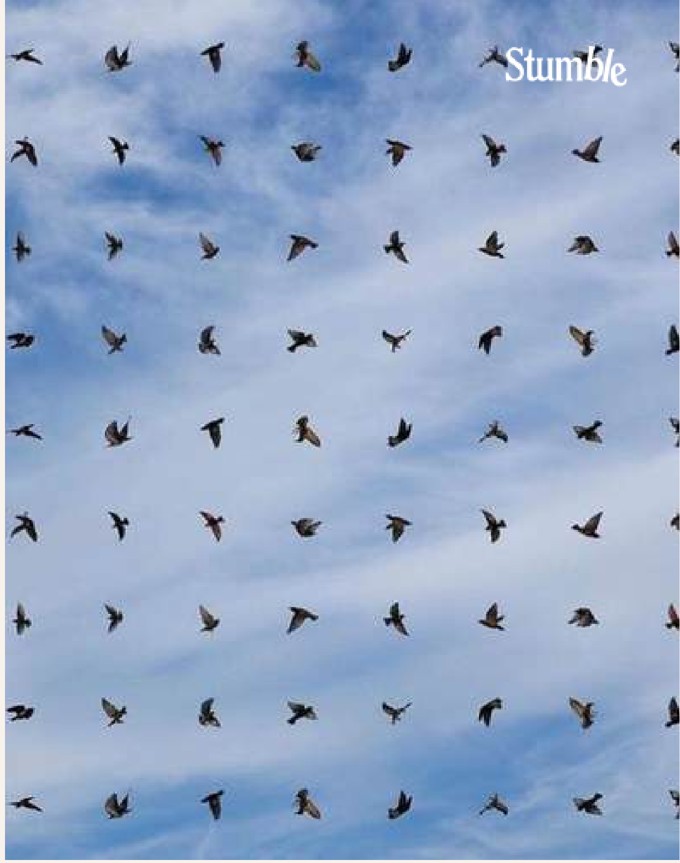
A digital-first reality has given **new importance to tangible, tactile reminders** of memories, passions, connections, and fandoms. The resurgence of flip phones and wired earphones, the vinyl renaissance, and the romanticisation of 'slow tech' online showcases **a desire for more tactile, intentional interactions with technology.**
Nostalgia has long been a familiar coping mechanism and has been a popular recent trend. But algonatives are almost using older tech to **construct a new future instead of escaping to the past.**
Taking inspiration from a range of historical eras to co-create a more desirable future for themselves and their communities, such as music fans having vinyl listening parties, **newstalgia** may be the way forward from here. Brands can also deepen relationships with their consumers via pop culture partnerships, creating collectables, and sponsoring the production of physical media.



Brand spotlight

Slightly over a decade since the launch of the first online dating app in India – Tinder, in 2021 – we have now seen these apps go from a novelty to gradual normalisation, from a potential for romantic fairy tales to easy-access hooking up, from optimistic swiping to loose ends, ghosting, and dating app fatigue. Downloads for such apps are slowing down, and a rising trend online is people asserting that 'dating apps are in their flop era'. A Forbes Health survey from May 2024 shows that young people are particularly feeling this way, with 79% of Gen Z and 80% of Millennials saying they are exhausted with online dating.

Users don't feel the algorithms of these apps are learning from them, and various thinkpieces and data stories have proved how the odds are forever not in the favour of the average user on these services. Dating app companies also continue to upsell their customers by paywalling actually helpful features. Increasing awareness of the vested interests of brands, along with a lack of queer-friendly safety measures etc. is leading to a disillusionment with the once-glowing promise of swiping to find love.



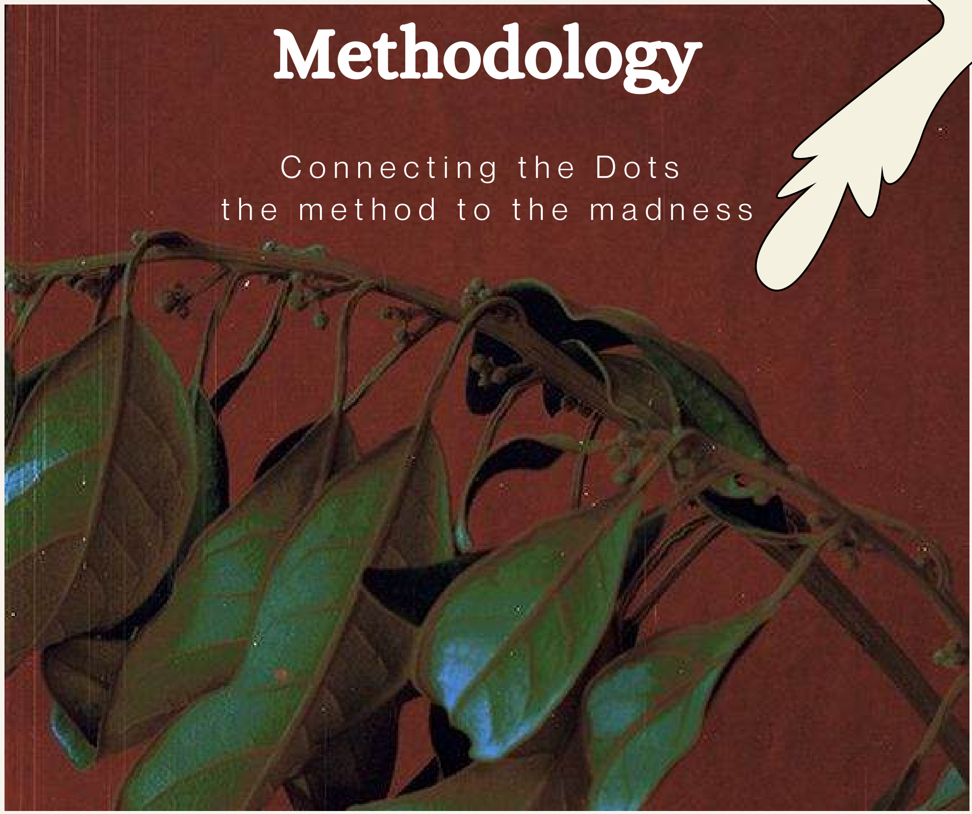
Moreover, dating on apps doesn't often feel 'real'...

...with their manufactured paradox of choice fatigue, endless talking stages that lend themselves to bad dating behaviour, and the performative nature of the interactions, wherein you have approximately five messages to impress a new match before they lose their attention. The proliferation of bots and AI-generated responses and bios on these platforms is also taking the charm away.

Dating apps rewired us when they launched – and are often blamed for 'hookup culture,' non-traditional relationships, and romantic hesitancies of young people. Are we now being unwired, or re-rewired? There is definitely a lot of baggage to unpack, and people are disregarding and deleting these apps altogether. Gen Z and younger daters are increasingly seeking IRL connection. These apps need to quickly evolve – and some already are, by pushing for in-person events, because they know they need to bring in more authenticity to the romance they claim to offer.

Forecast Methodology

Connecting the Dots
the method to the madness



4 research methods adopted
Research Surveys
Focus Group Discussions
Trend Workshops & Immersions
Interviews

100+ experts interviewed across spanning roles

Artists
Creators
CXOs
Brand managers
Filmmakers
Talent Managers
Curators
IP Lawyers
Journalists
Marketing Consultants
Culture Commentators
Media Entrepreneurs

17 creative sectors explored

- *Creative Content Production*
- *Performing Arts*
- *Curation*
- *Gaming*
- *IP & Legal*
- *Music*
- *Social Media & Streaming*
- *Content Creation*
- *FMCG & Luxury*
- *Physical Experiences & Event Production*
- *Film & Television*
- *Talent Management*
- *Tech & AI*
- *Comedy*
- *Spoken Word*
- *Marketing & Brand Consultancy*
- *Culture Commentary & Journalism*

The study comprised digital mapping of global trends, a survey, trend mapping workshops, secondary research and interviews. We launched a survey for cultural tastemakers, creators and sector leaders Spoken Fest 2024, who shared their astute understanding of content creation and consumption patterns in the country.

We then facilitated hands-on trend mapping workshops with artists, marketing experts, brand leads, entrepreneurs, creators and design consultants, further helping fine tune cultural and content consumption trends shaping India. This was supplemented by expert interviews from across India, including young creators in Tier 2 and 3 cities

The inputs we gleaned from the research helped further synthesise into directions – big trends, pathways, best practices – that have emerged in the report.

INDIA IN NUMBERS *a glossary of where we stand*

Demographics

POPULATION

1.42 BILLION
World Bank, 2022

RURAL POPULATION

908.8 MILLION, OR ABOUT 64% OF THE POPULATION
Macrotrends, 2022

YOUTH NATION

66% OF THE POPULATION IS below the age of 35
International Labour Organization, 2024

Economy

WEALTH

PER CAPITA **GDP** **$2,410.90**
World Bank, 2022

BILLIONAIRES

200,
Forbes India, 2024

WEALTH GAP

IN **2022, 40.1%** OF INDIA'S WEALTH SHARE belonged to the top 1% of the country
World Inequality Lab, 2024

Technology

GAMING NATION

ABOUT **425 MILLION** GAMERS, SECOND ONLY TO CHINA
EY-Parthenon, 2023

STARTUPS

117,254, WHICH HAVE CREATED OVER 1.2 MILLION JOBS
Department for Promotion of Industry and Internal Trade, 2024

SOCIAL MEDIA USERS

462 MILLION, OR ABOUT **32.5%** OF THE POPULATION
Data Reportal, 2024

Pop Culture

THE BOLLYWOOD JUGGERNAUT

In 2023, Hollywood films constituted only **9%** OF INDIA'S APPROXIMATE $1.46 BILLION domestic box office gross
Ormax Media, 2023

HOOKED TO CONTENT

There were **707 million** OTT (audio and video) subscribers in India as of 2023
Internet and Mobile Association of India and Kantar, 2023

FANTASY SPORTS

The size of the Indian fantasy sports market was around **$751 million** in India in 2023
Markets and Data, 2023

CURATION COURTESY : CANVAS8

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Dhruvank Vaidya
Divyaprakash Dubey
Esha Paul
Gulal Salil
Kevin Lee
Maitreyi Mittal
Mandovi Menon
Mohd Sharukh
Mrigya Varma
Nikhil Taneja
Nona Uppal
Pankhuri Upadhyay
Peter Kotikallapudi
Prateek Arora
Pratiksha Chauhan
Priya Dali
Pulkit Kochar
Rabia Gupta
Rashmi Dhanwani
Ravina Rawal
Reema Maya
Ria Chopra
Rishab Nahar
Rohan Mukherjee
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OML
REPRESENT
CREATE & COLLAB
Yuvaa
ONE HAND CLAP
COLLECTIVE ARTISTS NETWORK
FESTIVALS FROM INDIA
Spotify
(gaysi)
EGODEATH
IF.BE Architecture Design The Arts
DEADANT
HUNGER INC.

CONCEPTUALISE

Creative Strategy & Insights | Workshops | Reports

CREATE

Content Production | Experiences & IPs | Disruptive Interventions

CONNECT

Curation | Partnerships | Community activations

CONTACT

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Stumble *with us*

Stumble is a digital-first platform and an offshoot of Kommune that explores, dissects & forecasts conversations, and insights around culture in India. We are also creative partners helping brands connect with culture through engaging content, impactful experiences, and communities.

Our team blends their cultural literacy, strategic acumen, and creative intuition to shape narratives that deeply resonate with audiences. Contact us to know more about our agency services.


KOMMUNE
Stumble
Consumed
A deep dive into consumer culture in India