



**FUZION**  
PUBLIC RELATIONS

# DECODING THE REGIONAL CONSUMER

2023



**SCoRe**  
INSIGHTS



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# FOREWORD

Fuzion PR Pvt Ltd has been the flag bearer of Regional Communication in India for more than a decade & this whitepaper in collaboration with SCoRe Insights stems from that commitment. The whitepaper 'Decoding the Regional Consumer in India' highlights the significance of Regional Communication in India & the challenges that come with it.

The Indian market is unique, diverse, & ever-changing. It is home to over 1.4 billion people, of which over 1 billion reside in Regional India (non-metro regions of our country). With a multitude of cultures, languages, & customs, understanding the regional nuances of communication becomes crucial. This study provides valuable insights on how brands can connect with the regional consumers in India.

Investing in Regional Communication is no longer an option but a necessity. Regional consumers are becoming increasingly important in driving the growth

of organisations. Brands that fail to recognise & respond to these differences, risk losing out on significant competitiveness.

As a regional PR firm, we understand the importance of a deep understanding of regional consumers & crafting communication strategies that resonate with them. I hope this whitepaper serves as a valuable source for brands looking to expand their reach & connect with regional consumers in India. I sincerely believe this will help you further explore the immense potential that regional India has to offer.

**Mukesh Kharbanda**

Fuzion PR





# PREFACE

It is my pleasure to present to you the latest whitepaper on Decoding the Regional Consumer in India by Fuzion PR in association with SCoRe Insights.

We recognise the importance of effectively engaging with consumers in diverse regions. It is not just a requirement, but a necessity for brands to succeed. This whitepaper is the result of extensive research with Indian corporate communication leaders. Our goal was to understand the nuances of regional consumers and explore how to engage with them meaningfully. We found that regional diversity combined with the fragmented media ecosystem, creates a unique set of challenges for communicators.

Our research also highlighted the fact that regional consumers cannot be looked at solely through the lens of geography and/or income.

Brands must dig deeper to understand their preferences and needs, and regional PR firms can bring the necessary skills to help brands successfully communicate with regional consumers. The whitepaper outlines a comprehensive set of such skills, along with a way forward for brands and regional PR firms to build stronger, more impactful communication strategies for regional consumers. We hope that these insights will help you better understand the regional consumers in India and guide you in building successful communication strategies.

**Hemant Gaule**

SCoRe





# EXECUTIVE SUMMARY

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Brands, big and small, must embrace the reality of India – the fortune beyond the mainstream is crucial to thriving. Over the last two decades, several monumental fundamental transformations have happened in India that have brought the Regional Consumers in India not only closer to the organisations, but also at the forefront of communications strategies.

From advancements in hardware and internet connectivity, and advent of social media, to rising incomes and standards of living, the ecosystem has never been riper for regional aspirations to become significant. All of these transformations have happened in an incredibly diverse landscape.

And reconciling this diversity into communications strategies remains increasingly challenging for public relations and communications teams. Media landscape is fragmented and the margin for error is low. It takes a holistic toolkit of competencies to guide brands on how to tread this path successfully.

From a firm grasp on regional trends and cultural nuances, to deep consumer insights, this study reveals the increasingly crucial regional PR firms will play in counselling brands to succeed in engaging in the regional consumer meaningfully. The way forward is for brands to be proactive in engaging regional counsel and bold in investing in resources that support it. The competitive edge to be earned this way will be the key to scaling with a growing India.



# REGIONAL RISE

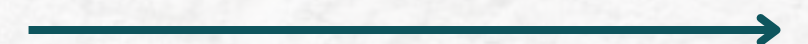
## UNLOCKING POTENTIAL FOR BRANDS

**The Indian currency note** is the only one of its kind in the world - with the denomination it carries printed in 15 languages. Which does not come as a surprise in a country with 22 official languages, 150 major languages (those spoken by over 10,000 people) and over 19,500 dialects. It is also therefore not a surprise that regional media has remained formidable across the country, despite the advent of digital media and increasing homogenisation of its population towards English as a major language.

In fact, in contrast to most other regions, in India, regional media has been thriving. Only two of India's top 10 leading newspapers are in English. The other eight comprise four languages - Hindi (4), Malayalam (2), Telugu (1), Tamil (1).

Online platforms are also witnessing a growth of more regional content and conversations. Since this is happening in a more globally resurgent India, brands are increasingly having to think global and act locally, in order to truly speak with the Regional Consumer.

All this has led to some **Extraordinary Outcomes on Regional Consumption**





# KEY TRANSFORMATIONS IN REGIONAL INDIA

## Rising Regional Aspirations

According to a report by BCG, the number of households in India with an annual income of ₹ 1 million to ₹ 10 million (\$13,600 - \$136,000) is expected to grow from 14 million in 2018 to 26 million by 2025. This indicates a jump in the no. of middle-class households in regional India who **aspire to consume premium products and services**, creating a ripe opportunity for PR teams to help brands connect with this audience.

## Growing Regional Media Consumption

A 2021 report by BARC India and Nielsen revealed that regional language television channels accounted for 68% of the total TV viewership in India. Additionally, regional language print **media has a strong readership base in non-metro cities**. This presents an opportunity for public relations teams to reach out to these regional media outlets and help brands connect with their target audience.

## Increase in Digital Penetration

According to IMAI, the number of internet users in rural India is expected to reach 290 million by the end of 2021, presenting a vast digital audience for public relations teams to reach out to. This is further supported by the fact that **regional language content consumption** has been on the rise on digital platforms, with a 20% increase in daily regional language users on social media platforms like Facebook & WhatsApp.



## KEY TRANSFORMATIONS IN REGIONAL INDIA

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Furthermore, the Government of India has been actively promoting regional development through schemes like Digital India & Make in India, which promote digital infrastructure & local manufacturing. This has created a favourable environment for brands to invest in regional India, providing PR teams with opportunities to help them build relationships with regional consumers & stakeholders.

There was never a doubt of the fortune that lay at the bottom of India's pyramid, but the increasing focus on India's regional consumer has become crucial for organisations to thrive. Needless to say, regional India offers some incredible opportunities and formidable challenges for PR & communications professionals.

In order to understand the regional consumer and their relationship with brands, we discussed this space with India's leading corporate communicators.

**This is what we found.**

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*Organisations can't scale up in India without tapping the regional markets.*



# ACKNOWLEDGING THE ASPIRATIONS

## DEFINING THE REGIONAL CONSUMER

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It is no longer sufficient to define the regional consumer on erstwhile factors such as geography or income groups. The biggest downside of this approach is that it prevents communicators from going beyond a surface-level understanding of how regional consumers think.

For instance, they might be tempted to consider the regional consumers as price conscious instead of being value conscious, two preferences that are vastly different. One might also make the mistake of attributing relatively low consumption of luxury goods & services in regional India to low aspirations, instead of their low availability.

Smart communicators look for factors beyond those, to understand the decision-making process of regional consumers. This study found the following factors play a crucial role in this process.

*Regional aspirations are rising faster than infrastructures that can address them*





# WHAT THE REGIONAL CONSUMER WANTS

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**78.6%**

Indicate that consumers **Want More Choices**

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**Reason:** It is not the lack of aspirations or resources, but availability of products and services which limits the growth of consumerism in regional consumers

**Implication:** Brands need to diversify their product offerings and ensure that they cater to the unique preferences and needs of regional consumers.

**67.7%**

Consumers prioritise **value for money** over lower costs

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**Reason:** This is a critical distinction often misconstrued due to popularity of discounts, and larger volumes of smaller ticket item sales.

**Implication:** Brands must evolve their mindset from considering regional consumers as primarily price conscious & highlight tangible & unique value they provide.

**76.9%**

Consumers value **local nuances, values**

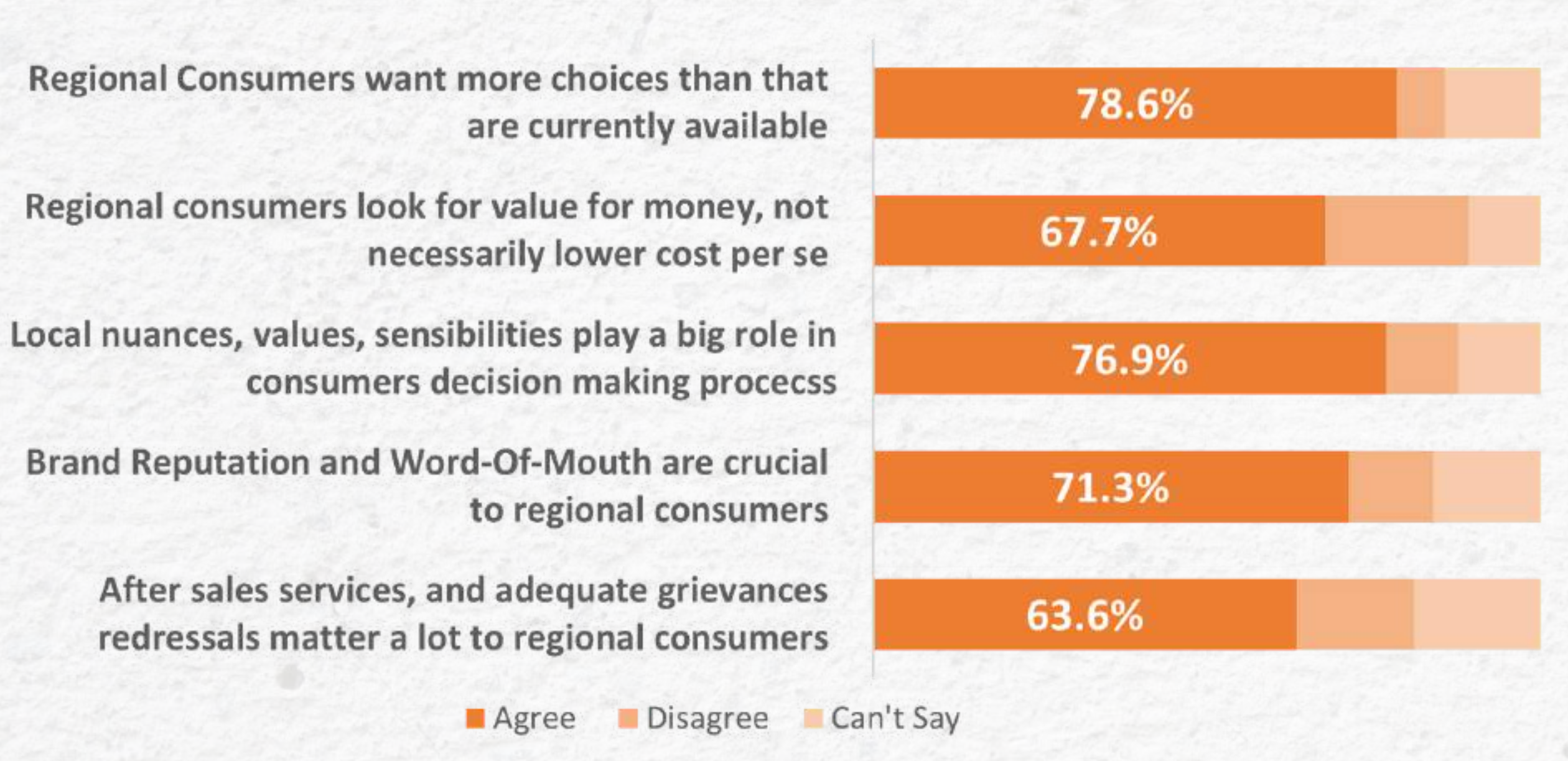
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**Reason:** The multitude of languages, religions, cultures, and traditions. Consumers' behavior is highly influenced by local customs, beliefs, and preferences.

**Implication:** Brands must tailor their messaging and communications strategies to the cultural norms and traditions of specific regional markets.



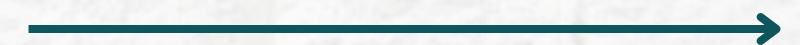
# WHAT THE REGIONAL CONSUMER WANTS



Brand reputation and word-of-mouth were also identified as crucial factors in the decision-making process of regional consumers, with 71.3% of respondents highlighting this factor. Brands need to focus on building a strong, long-term reputation and trust.

Overall, these insights underscore the importance of brands understanding the unique needs and preferences of regional consumers in order to successfully engage them.

And that leads to **several interesting challenges.**





# BEYOND THE BASICS

## CHALLENGES OF COMMUNICATING IN REGIONAL INDIA

### Top Challenges in Communicating Regionally

88.7%

Ensuring messages are **culturally appropriate**

86.5%

Liaising with **Regional Media** effectively, meaningfully, & for the long run

85.7%

Understanding and **profiling** regional consumers

78.4%

Drafting key **messages** that are relevant for & appeal to regional consumers

77.6%

**Timing** campaigns & communications perfectly with regional trends



# BEYOND THE BASICS

## CHALLENGES OF COMMUNICATING IN REGIONAL INDIA

A significant majority of our respondents highlighted a variety of challenges that emerged from the uniqueness of regional media. In contrast with the typical media relations approaches across mainstream of national media, which tend to be relatively “well-oiled”, these unique traits of regional media require specialised knowledge to crack it.



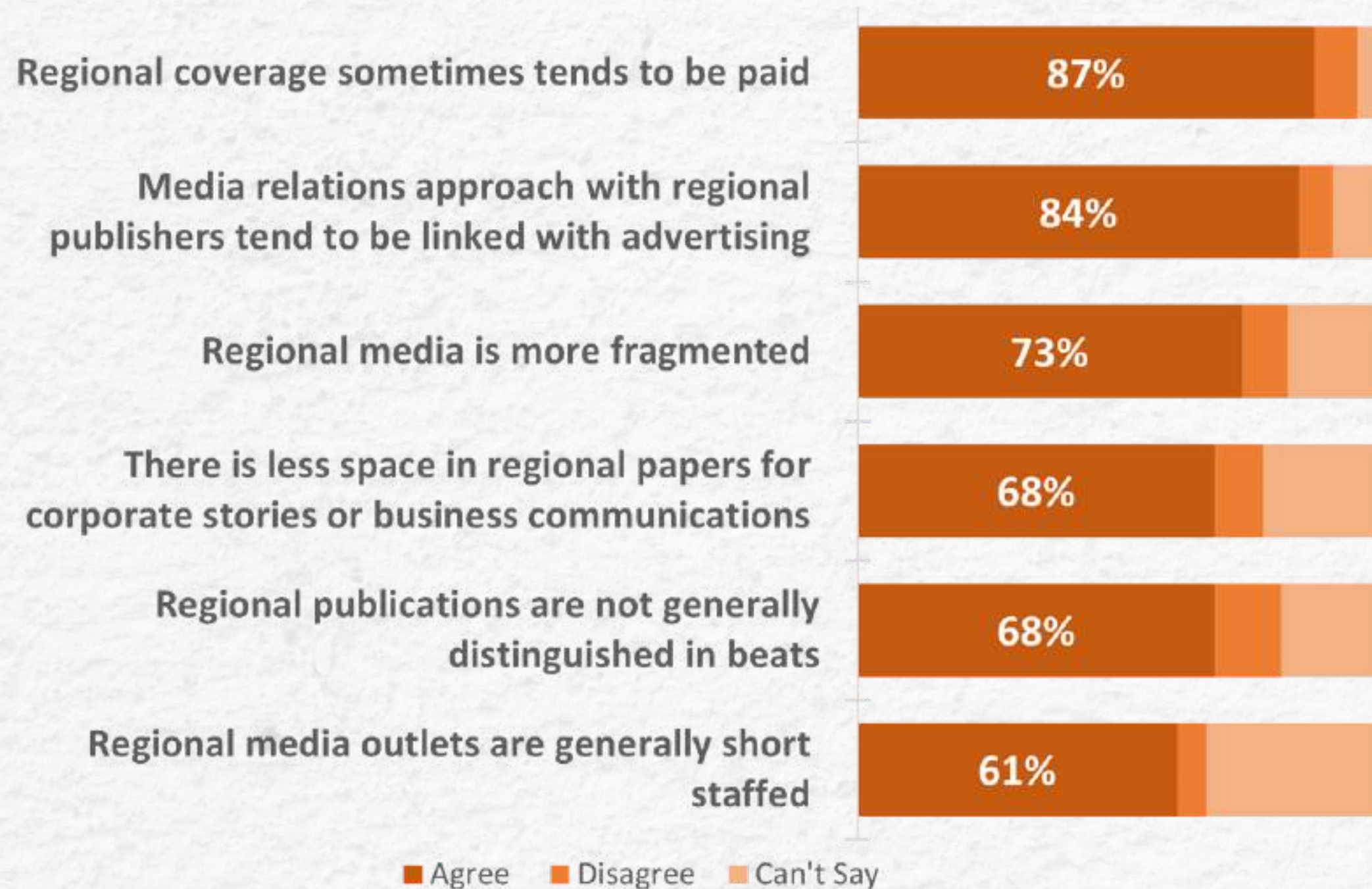
*Media has become deeply personalised; it's crucial to tailor your messaging & content to regional consumers.*

When we probed the **challenges specific to dealing with regional media**, this is what we found.





# CHALLENGES SPECIFIC TO REGIONAL MEDIA



A major challenge is **paid coverage**, impacting message authenticity. Media relations with regional publishers linked to advertising create conflict of interest.

Moreover, the Indian **regional media landscape is fragmented**, making it difficult to engage with relevant outlets. Limited space in regional papers makes it difficult to get clients' messages across.

Finally, regional publications often lack **beats**, making targeting the right journalists and outlets challenging. Short-staffed regional media outlets result in slower turnaround time.

Despite these challenges, regional public relations firms must work closely with regional publishers & media outlets to ensure that their clients' messages reach the right audiences and resonate with regional consumers.



# CRACKING THE CODE

KEY COMPETENCIES REGIONAL PR FIRMS MUST BRING (RANKED)

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Regional media outreach

1.05

Mapping influencers & micro-influencers

1.11

Understanding of cultural nuances

1.15

Consumer Insights

1.31

Analytics & reporting

1.71

Linguistic expertise & translation

2.15

Content, social media, digital

2.16

Crisis management & communication

2.68

Event management

2.87

Going beyond regular PR tools

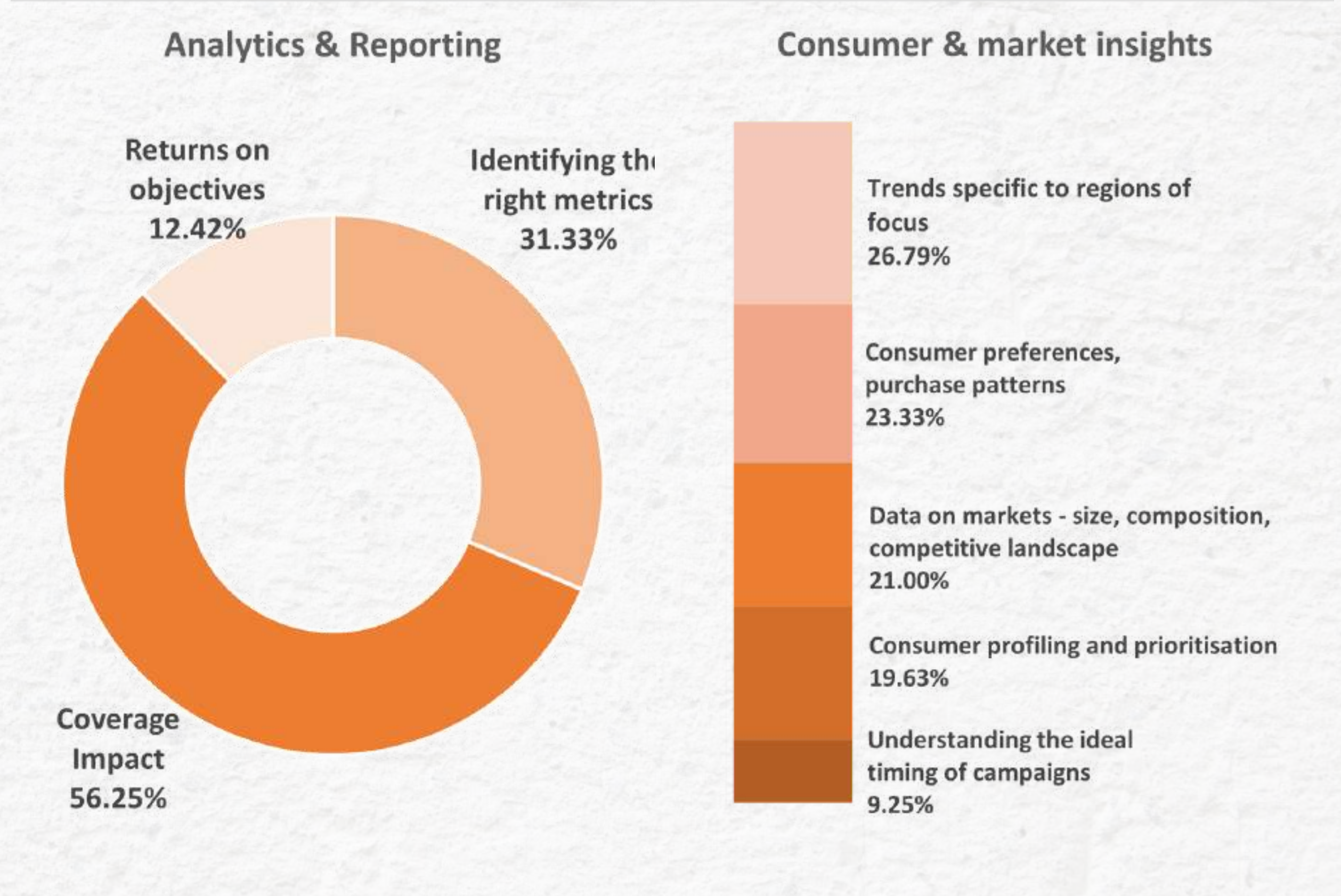
3.25



# INSIGHTS NEEDED FROM REGIONAL PR FIRMS

Furthermore, we broke down two of the skills in this list to try & understand the specific components of those counsel and their relative importance: →

Tackling these challenges requires dedicated expertise in regional communications. It is especially paramount when there is a need to establish connections & create impact on limited resources. Brands rely extensively on regional PR firms to approach regional markets. Such counsel is founded in a firm grasp on regional consumers' psyche, & a thorough familiarity of the regional media landscape & its players.





# WAY FORWARD

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The insights from the study on regional consumers have significant implications for regional PR firms that work with brands in these markets. Given the indispensability of regional consumers and the challenges in engaging, it is paramount that brands and consultancies collectively enhance their focus on this area in the following ways:



**Expand availability of consumer insights**

Brands & PR firms need deep consumer insights to understand regional markets. This requires investment in research & analytics for a continuous flow of reliable insights.



**Play a more strategic role than an execution role**

PR firms should play a strategic role, going beyond media relations to earn influence in innovative ways. This requires tailored communication strategies for regional audiences, accounting for cultural nuances.



**Reinforce importance of regional engagement to clients**

PR firms must build a business case for investing in regional communications strategies. This involves educating them on the unique characteristics of regional audiences and the potential of engaging them.



**Help clients build a case for it internally**

Regional PR firms must support client teams in highlighting the importance of regional engagement to internal stakeholders, & provide evidence for brands to allocate more resources for regional engagement.



**Support editorial evolution**

Regional PR firms carry the crucial responsibility of helping regional publications align their editorial approaches & structures to balance outlook of business stories with their readers' expectations.



# BRANDS MUST BE PROACTIVE.

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In order for these implications to effectively take place, brands must be proactive. Brands should take the initiative to invest in regional communications and involve regional PR firms in their decision-making processes.

Rather than waiting for market trends or issues to arise, brands should prioritise regional engagement by proactively allocating resources and working collaboratively with regional PR firms to develop effective communications strategies.

By approaching regional engagement in such a way, brands can build strong, lasting relationships with regional audiences and gain a competitive advantage in these markets.







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