Report on Market research for promotion of India Handloom brand

Submitted to:

NATIONAL HANDLOOM DEVELOPMENT CORPORATION (NHDC) Ltd.

(A GOVERNMENT OF INDIA UNDERTAKING)

O/O DEVELOPMENT COMMISSIONER FOR HANDLOOMS

MINISTRY OF TEXTILES

Submitted by:

MAJESTIC MRSS

Acknowledgement

The Indian handloom industry demonstrates the richness and diversity of Indian culture. The handloom industry is the second-largest employment provider for the rural population in India after agriculture. Recognizing the unparallel uniqueness and fineness of Indian handloom products, National Handloom Development Corporation (NHDC) Ltd, a Government of India undertaking under Ministry of Textile, intends to leverage its spectrum of attributes to promote it under "I**ndia Handloom Brand"** for generating a special market space&popularizing the Indian Handloom products within the younger generation, the future of India.

We, Majestic MRSS Ltd are expressing sincere gratitude to NHDC Ltd and the Office of Development Commissioner- Handloom, Ministry of Textile, Government of India for entrusting this prestigious market research. This study has benefitted from the inputs of the senior officials of the Ministry of Textiles, Government of India and other stakeholders.

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Raj Sharma
Chairman

Table of contents

Abbreviations **4**

Executive Summary **6**

E.1 Research Process 7

E.2 Key findings from the market research 7

Study Details **10**

Project Background 11

Study objectives 11

Scope of work 12

Approach and Research Methodology 12

Target Respondents for all research processes 13

Sample Coverage 14

CHAPTER I: DI Insights & implementation in FGD **15**

1.1 DI key insights and implementation in FGD discussion guideline 16

CHAPTER II: FGD Findings **18**

2.1 Key Insights-Point of Purchase for textile products 19

2.2 Key Insights-factors important for choosing a product 19

2.3 Key Insights- Awareness and usage of handloom products 20

2.4 Key Insights- Attitude towards handloom products 21

2.5 Key Insights- Perceptions about handloom products 21

2.6 Key Insights- Handloom products generally bought 22

2.7 Key Insights- Buying Purpose of handloom products 22

2.8 Key Insights-Disadvantages of handloom products 23

2.9 Key Insights- Attributes to be improved 24

2.10 Key Insights- Ideal ways of creating awareness 24

2.11 FGD Summary 25

CHAPTER III: FGD & DI insights implementation in quant questionnaire **27**

3.1 Key take outs implemented in Quant questionnaire 28

CHAPTER IV: Quantitative survey analysis **29**

4.1 Respondent profile - Demographics 30

4.2 Respondent profile: Residential details ... 31
4.3 Respondent profile: Socio economic details ... 33
4.4 Respondent Profile : Occupation ... 34
4.5 Respondent Profile : Household income profile ... 36
4.6 Point of purchase for textile products: Branded Vs unbranded ... 36
4.7 Dress code and material used ... 38
4.8 Key drivers for choosing a textile product ... 40
4.9 Importance of fabric quality ... 41
4.10 Most frequently bought dresses ... 42
4.11 Handloom products: awareness ... 43
4.12 Handloom products: Usage ... 44
4.13 Handloom products : comparative perceptions ... 45
4.14 Handloom products: drivers & motivators ... 46
4.15 Delivery time allowed for quality product ... 46
4.16 Endorsement ... 47
4.17 Media habits ... 48
CHAPTER V: Key Insights ... 49
5.1 Awareness and usage of Handloom products within the young generation ... 50
5.2 Uniqueness of handloom products acknowledged by the target group ... 50
5.3 Challenges of handloom products as perceived ... 50
5.4 Potential for Handloom products ... 51
5.5 Preference for branded apparel within the young generation ... 51
5.6 Effective media for brand promotion ... 51
Chapter VI: Way Forward ... 52
6.1 Brand Promotion ... 53
6.2 Ensuring availability ... 53
6.3 Design and look improvisation ... 54
6.4 Pricing ... 54
List of Tables, Charts and Graphs ... 55

Abbreviations

Abbreviations	Descriptions
ABP	AnandabazarPatrika
BHK	Bedroom House Kitchen
CBD	Central Business District
DI	Depth Interview
FGD	Focus Group Discussion
GDP	Gross Domestic Product
HT	Hindustan Times
IHB	India Handloom Brand
INR	Indian Rupee
MRSS	Market Research Support Services
NHDC	National Handloom Development Corporation
SEC	Socio Economic Classes
TG	Target Group
TOI	Times Of India
TOM	Top Of Mind
TV	Television

Executive Summary

- Observations and Way Forward

E.1 Research Process

NHDC Ltd had appointed Majestic MRSS India to understand awareness and perception of handloom products with respect to other apparels used by the younger generation of the country; explore market opportunities and ways to popularize the increased usage of handloom within the target group.

A detailed research assignment was conducted to address the objective by using both qualitative and quantitative research methods across 13 cities of the country which included 7 metro cities. The research was conducted during the months of February-March 2016 covering Depth Interviews (total 31 nos. in 4 metro cities), Focus Group Discussions (total 8 groups, 2 each in 4 metro cities; male and female separate groups), and quantitative survey within 2933 target respondents via structured questionnaires in 13 cities across the country.

The target respondent interviewed in all the three research processes were Indian residents in the age group of 18-30 years with a monthly individual income of >INR 40K and a resident of the respective city for more than 5 years. In case of students, the income category was filtered by amount of monthly pocket expenses >INR10K.

Qualitative methods like depth interviews were conducted initially to explore usage and attitude, inputs of which were used to design the FGD discussion guidelines. The combined inputs from DI & FGD were used to design the structured questionnaire for quantitative survey.

E.2 Key findings from the market research

- Primary survey revealed that Handloom products are well appreciated by the young Indian because of its excellent fabric quality and a different overall look. Indian climate is primarily hot round the year and handloom products being airy are the ideal fabric to put on. However, handloom products are bought only for special occasions and not for regular usage thereby reducing frequency of purchase. This attribute needs to be highlighted strongly by way of advertisement and promotion through recommended media which would help enhance the level of acceptance and usage pattern amongst the target audience.

- The advertisement should carry strong message about the following points:
  - Highlighting superior fabric quality, comfort factor, symbol of Indian heritage, and eco friendliness of handloom products in all communications
  - Handloom products to be promoted as the most comfortable dress material ideal for Indian climate in majority of the locations in the country
  - Today's young affluent Indians, both employed and students are well informed and take very conscious decision while buying and using apparel. There exist strong preferences of specific dresses for specific occasion. This practice opens up the opportunity for various apparel brands to offer their innovative product basket to the target group. The target group love to experiment when it comes to casual and festive wear. Specifically women have adapted to various forms of dresses including Indo-western, fusion dresses and pure western dresses along with the normal Indian attire. They no more stick to traditional wear as early times. There are distinct choices for formal wear and informal wears. Not only the type of dress, designs, colour ranges and fit also varies with the kind of dress worn in specific occasion.
  - To promote the use of handloom, there is a need to create occasion specific dresses with a blend of contemporary and traditional designs and colour. Introduction of formal shirts both for men and women would increase frequency of purchase as these are the most frequently bought dress items by the young Indians. Also, there is a need to introduce parallel range of economical dresses for daily use along withthe expensive range.
  - The study revealed that the major reason for non-popularity of handloom products is its limited availability and negligible communication / publicity as *a product with inherent superior fabric quality*. The educated vibrant youth of the country are aware of handloom products only by its literal sense and word of mouth from the earlier generations.
  - Therefore to promote the product, there is an immediate need of availability of handloom products across different type of retail channels backed up with relevant advertisements. Ensure availability via online e-commerce sites, more number of exclusive outlets in malls and high street and branded lifestyle retail chains in India.

- Lack of promotion and publicity of handloom products specifically apparels; have led to minimum awareness and interest within the young generation thus translating into very limited usage of handloom products.

- However, it has emerged from the survey that, home furnishing products made of handloom are considerably popular and preferred as they are durable (curtains/ cushion covers) and perceived to be good for skin (bed sheets and covers).

- It is imperative to generate awareness for "Handloom"in general and *India Handloom Brand (IHB) as a premium brand* with a strong message of superior fabric quality and elegant design of the India Handloom Brand using digital media supported by outdoor advertisement keeping in mind the media habits of target customers.

- It is evident from the study that respondents cannot differentiate clearly between Khadi, Handloom and cotton fabric.There is a need to educate the target customer about the same specially Handloom productswhich calls for adequate campaigningto promote usage of Handloom apparels across young adults of the country.

Study Details

Project Background

Recognizing the unparallel uniqueness and fineness of Indian handloom products, NHDC Ltd. intends to leverage its spectrum of attributes to promote under "**Brand India Handloom**" for generating a special market space and increased earnings to the weavers.

Other than developing a premium brand, the concept behind the program aims specifically at popularizing the Indian Handloom products within the younger generation, the future of India.

To achieve the laid down objectives, MRSS India conducted a detailed research work during the period Jan 2016 to March 2016, targeting the affluent Indian population within the age bracket of 18-30 years across various cities of the country. The insights from the research are collated in the ensuing pages.

Study objectives

The study objective was to conduct market research including test marketing for In-depth understanding of consumer preference, attitudes, behavioral predispositions and perceptions of consumers that are needed to plan effective marketing and branding strategies.

Specifically, the following decisions were needed to be addressed through consumer research inputs:

- Identification of primary target segment of consumers with respect to socio economic class, geographic location, attitudinal and perceptual dimensions
- Positioning of handloom textiles with respect to mill-made and power-loom textiles, and thus evaluate brand building and product promotion strategies.
- Design of consumers "brand" experience with an understanding of the current perceptual limitations and barriers that need to be overcome through brand communication and designing more appealing brand touch-points.

Scope of work

The study was conducted based on the following predetermined scope of work:

- Identification of primary Target segment of consumers with respect to socio economic class, geographic location, attitudinal and perceptual dimensions
- Awareness level of handloom products and extent of usage
- Variety of handloom products used and variation in usage with respect to locations/age group/SEC
- Perception(myths & beliefs) of handloom products with respect to quality of product, design, availability, price, etc.
- Driving factors for choosing a particular textile brand
- Major steps to be taken to make Brand India Handloom a popular product
- Usage and preference for branded products in textile and gauge the success for Brand India Handloom
- Explore perceptions regarding differences with respect to mill-made and power-loom textiles, and thus evaluate brand building and product promotion strategies.
- Evaluate ideal media and ways for promoting Brand India Handloom

Approach and Research Methodology

A comprehensive primary survey was conducted to deduce the objective of the study including both qualitative and quantitative research methods as appropriate. The following research process was adopted:

i. **<u>Depth Interviews based on Qualitative method</u>**

   The first step of the research commenced with one is to one face to face interview with a few selected target respondents referring a discussion guideline that was conducted in Kolkata, Delhi, Mumbai& Hyderabad in order to capture region wise variation in perceptions if any.

Objective: In-depth discussion to explore dress codes, material preferences, awareness of handloom products, usage and attitude.

ii. **Focus Group discussions based on Qualitative method**

The second step of the research process was conducting a discussion session with a group of 8 target respondents (male & female separately) conducted by anexperienced moderatorin Kolkata, Delhi, Mumbai & Hyderabad. The discussion guideline for the focus group discussion was designed based on the inputs from the depth interviews conducted in step i.

Objective: *Exploring the scope of work within a homogeneous group to register collective feedback, brainstorming and generation of new ideas*

iii. **Primary survey based on Quantitative method**

The final step of the research process was an extensive primary survey that covered one is to one interview with the target respondents via a structured questionnaire. The structured questionnaire was designed based on the inputs from the FGDs and DIs conducted in step i & ii.
The quantitative survey was conducted in thirteen cities across the country which included Nagpur, Mumbai, Ludhiana, Lucknow, Kolkata, Jaipur, Delhi, Coimbatore, Kochi, Chennai, Bhubaneswar, Bangalore and Ahmedabad.

Objective: *Statistically validate outcome of qualitative research and analysing gaps if any*

Target Respondents for all research processes

The target respondents for all the research processes including FGDs, DIs and quantitative survey were as below:

- Age: 18-30 years covered equally within two brackets: 18-24 years(mostly students and few working) and 25-30 years (working)
- Gender: Both Male and Female
- Socio-economic class A& A+

- Income group: Individual Income > INR 40,000/- month; in case of student, pocket expense >=INR10,000/- month
- Resident of the city for at least last 5 years

Sample Coverage

The sample coverage for all the research processes is illustrated in the table below:

Table No. 1.1 Sample coverage

Research process	Sample size	Geographies covered	Research tool used
Depth Interviews (each interview was of average duration of 45 - 50 minutes)	31 Nos. (Nearly equal number of male female respondents were interviewed across cities covered)	Delhi, Kolkata Mumbai, Hyderabad	Discussion guideline designed by MRSS and approved by NHDC officials & consultants
Focus Group Discussions (Each group comprised of 8 participants , separate groups for male & female)	8 Groups (total participants 64Nos.; 32 females & 32 males)	Delhi, Kolkata Mumbai, Hyderabad	Discussion guideline incorporating learning from DIs
Quantitative survey (one is to one face to face interview)	2933 Nos.	Nagpur, Mumbai, Ludhiana, Lucknow, Kolkata, Jaipur, Delhi, Coimbatore, Kochi, Chennai, Bhubaneswar, Bangalore, Ahmedabad	Structured questionnaire incorporating insights from FGD & DI

CHAPTER I: DI Insights & implementation in FGD

1.1 DI key insights and implementation in FGD discussion guideline

The key takeaways from the depth interview conducted in the four major metros of the country were analyzed and relevant points included in the FGD discussion guideline that followed the research process. The various insights and their implementations are as follows:

a. Dress code related-DI insights

- Young affluent independent Indian men and women wear a variety of clothes
- Dress codes for various festive occasions vary but are same for work place across regions.
- List of most commonly purchased dress items for male & female
- Readymade garments preferred generally

Implementations in FGD discussion guideline:

Data validation and further probing into:

- Type of dresses worn in different occasions
- Reason for preference of a specific dress code
- Point of purchase of each type of dress code mentioned
- Reason for preference of point of purchase
- Dresses preferred tailor made and why
- Home furnishing products included in the list of products

b. Fabric quality related- DI insights

- Cotton considered to be the most popular fabric as regular formal wear
- Fabric quality considered most important in case of formals
- Branded products preferred for formal wear as they assure of the quality of the fabric, the colour, fit and design. Price not an issue

Implementations in FGD discussion guideline:

Data validation and further exploring:

- How important is fabric quality to the young generation in comparison to other parameters like price, colour, design& fit?
- How important is brand for apparel and home furnishing products? Is the preference dress specific or overall?

c. List of Attributes preferred - DI insights

- Availability of traditional and casual dresses in vibrant colours, varied designs, professional finish and aesthetic look is important. Price not an issue.

Implementations in FGD discussion guideline

Further probing into:

- Kind of design & colour variety required
- Readymade or dress material preferred
- Fabric quality with terms of longevity, extent of maintenance free required

d. Awareness of handloom products – DI insights

- Handloom products are known to all but usage is significantly nominal
- Handloom/ khadi products gives a different but mature look and hence was found suitable for elders only
- Handloom products conceptualized as something which is coarse, not fine, with different but limited designs and colour
- Publicity of handloom products were too poor to recall
- To gain popularity, handloom products have to be better designed, more abundantly available, and maintenance free.

Implementations in FGD discussion guideline

Validating and further probing into:

- What kind of promotions would make handloom top of the mind?
- Do handloom products need to be modified as per market demand or continue maintaining its own unique and different designs and colours?

CHAPTER II: FGD Findings

2.1 Key Insights-Point of Purchase for textile products

- Formals are always bought from branded shops across cities. All metro cities houses shopping malls with branded individual and lifestyle stores which is an easy reach for the customers

- Casuals and traditional wears are often picked up from local shops, fairs and exhibition other than branded shops

- Home furnishing products are generally preferred branded as these are expected to last long, and are status symbol for the household

- Delhi & Mumbai people are more into branded products than Kolkata and Hyderabad.

Preference for branded and unbranded products across the four cities covered during depth interviews for each type of dresses are depicted in the table below:

Table 2.1 Preference for branded and unbranded products across cities

Products	Delhi	Kolkata	Mumbai	Hyderabad
Formals	Branded	Branded	Branded	Branded
Casuals	Branded/ Fairs/ Local shops	Local shops/ Exhibitions	Branded	Local market/ Branded
Traditional	Boutique shops/ Branded	Branded / Local shops	Local shops/ Branded	Branded
Home Furnishing	Branded	Branded /Local shops	Branded	Branded / Local shops
Winter wear	Branded	Local shops	Branded	Local shops

2.2 Key Insights-factors important for choosing a product

During FGDs respondents revealed various factors that they perceive to be important for choosing a textile product both for apparel and home furnishing which are listed below:

- Fabric quality is one of the most important determinants for choosing a particular product in case of apparel.*"If the quality is good, price does not matter............."*

- Because of the similar climatic conditions in the metro cities, cotton is preferred by all across regions for formal wear especially as it is soft, airy, light weight and comfortable.

- For casual wear, unique trendy design becomes the most important factor in comparison to fabric quality and price.

- For all products, the target group is willing to pay right price if the product is as per their requirement

- Fast colours and fittings would enhance preference for a particular product- *"There are few bands like – 'W' which has great designs but worst fittings."*

- In case of home furnishing products, fabric is not important as much as in apparels, however thick fabric is preferred. Colour options and designs are most important factors for choosing a product.

2.3 Key Insights- Awareness and usage of handloom products

Awareness and usage of handloom products within the young Indians were found to be scanty and their feedback was:

- There is a general awareness of handloom products across regions. The young generation knows what a handloom product is and the literal difference between power loom and handloom products.

- However, handloom products are generally bought impulsively and not intentionally or a planned purchase. - *"in many cases it was a spontaneous purchase, I happened to be crossing the handloom shop and found something fancy to the eye….and bought it"*

- Young people from Kolkata and Hyderabad were found to be fonder of handloom products than Delhi & Mumbai. They acknowledge handloom products as aesthetically different and regard it suitable for religious and serious occasions. -*"I wear handloom products when visiting a temple or a relative's place. I also wear it on important official meetings as it gives a dignified and matured look"*

- Handloom products are occasional wears and are not used regularly because of its distinct look and design

2.4 Key Insights- Attitude towards handloom products

As cited by the FGD respondents, handloom products are preferred to be used for the following reasons:

- To look dignified
- For going to temples / religious places
- Only to look simple and matured
- Home décor stuff made of handlooms are very beautiful and they add a value to the house
- Handloom products look unique and people cannot easily copy the style. It's basically a class apart.
- Very comfortable during the summer months
- Suitable for festival and occasions at home, likewise while visiting friends and relative places
- Great attire for Office meetings

2.5 Key Insights- Perceptions about handloom products

The major perceptionsand identification of handloom products as indicated by the FGD respondents across all the cities surveyed are as follows:

- The thread and weave pattern can be seen; gap in weaving
- The cloth surface is slightly rough
- The cloth thickness is more than normal cloth
- The colors are slightly dull
- Simple designs with unique embroidery not gaudy
- Itchy when you wear it
- More expensive than mill made
- Less color options
- Same repetitive designs, mostly bridal prints/pots designs, elephants, dolls, Rajashatni/lady designs/Lord Krishna prints/ tribal prints or Gods
- Not available at all places, seasonal and only available at Exhibitions

Though handloom products were perceived to be very expensive, target respondents also acknowledged the fact that buying handloom products is kind of contributing to the growth of those artisans who work for days to keep our traditions alive. --“It feels like I am making a direct contribution to the Indian GDP”.

2.6 Key Insights- Handloom products generally bought

Handloom products are well accepted as home furnishing purpose and are one of the common buys. In case of apparel, people prefer mostly buying traditional dresses including “Sarees and Kurtis” for female and “Kurtas& Jackets” for men. Specific products usually purchased in handloom are:

- Curtains, sofa covers, bed sheets , bed covers, table cloths, pillow /cushion covers, curtains, carpets, bottle cover, small home décor cloths, jute bottle bags as home furnishing products
- Ethnic wear like Kurtis, nighties, dupattas, dress material for salwar suits, Khadi silk, Handloom shawls, Banarasi Handloom Silk Sarees for women
- Kurtas, pajamas, Nehru jacket for men
- Handloom products are generally purchased from KhadiBhawan/ stores, Fab India, State Handloom showrooms and Exhibitions / Fairs.
- Frequency of purchasing handloom products is limited to once a year or once in two years. One purchase usually lasts about 2-3 years.
- Purchase of handloom products are generally triggered during festival season like Durga Puja, Ganesh Chaturthi, Diwali or Navaratri as appropriate to a specific part of the country.

2.7 Key Insights- Buying Purpose of handloom products

Buying purpose of handloom products showed interesting trends within the target group and are listed as below:

- Majority of purchases made for handloom product are for self and it is a very rare occasion when one purchases for gifting others.

- Handloom products are unique and expensive and people prefer to use themselves rather than to gift others. They prefer gifting only to their near and dear ones.--- *"Handloom products are not preferred by all people, hence maybe awkward to give a present to someone who will not appreciate it"*

Motivators/ drivers for purchase of handloom products

- Comfortable and airy
- Simple and traditional look
- Not transparent, good for office wear
- It gives elderly and more mature look
- --"The main motivating factor for purchasing a handloom product is to purchase something which is unique. Something which is decent, simple and represents the Indian heritage and traditions………"

2.8 Key Insights-Disadvantages of handloom products

The disadvantages of handloom products as perceived by the target respondents during FGDs are summarized below:

a. **Maintenance**

- Storage and maintenance of handloom products are very difficult and time consuming
- Handloom needs starching and ironing after every use
- Sometimes after starching starch patches on the clothes remains
- Within few days of wash, handloom products starts giving an older look
- Fading of colour after few washes; blues and reds fade faster

b. **Look & design**

- Looks matured in the handloom clothes
- Less design options ; All traditional designs nothing in fusion with contemporary style
- Limited Colors option
- Fitting at times is a problem
- Lack of options for Men

c. **General issues**

- Lack of size options
- Not multi-functional
- No publicity in metropolitan cities
- Very limited availability
- Limited exhibitions

d. **Fabric quality**

- Fabric Shrinks after a wash and fitting issue arises
- Itchy feeling

e. **Price**

Price is always higher than the normal clothes of same category but different fabric

2.9 Key Insights- Attributes to be improved

Attributes that may be improved to make handloom products more acceptable to the mass and specifically to the younger generation of the country would be more of the following:

- Fusion designs (traditional and contemporary designs)
- Varieties of clothes for men
- Smoother finishing to make it easier to wear in any kind of climate
- Easily available
- Awareness to make it popular and trendy among the youth
- Variety in sizes as well as fittings
- Colors and more of color combinations
- Economical price (or have different pricing for regular wear and expensive for special occasion wear)

2.10 Key Insights- Ideal ways of creating awareness

Target respondents have come up with a list of ideal ways of creating awareness for handloom products as summarized below:

- "Availability of handloom products via e-commerce sites or its own online store would increase awareness and usage of handloom products in many folds...."

- The most common names that have come up as a suggestion for brand ambassador for handloom products are Amitabh Bachchan and VidyaBalan
- Print media was rarely mentioned by the target groups across the cities. Few mentioned about ABP, TOI and HT.

  In order of preference, the ideal media identified by the target respondents:
  - **Social Media** – Facebook, Twitter, Snapchat, Linkedin, Watsup, Hike Messenger, Instagam
  - **E- commerce Sites** – Flipkart, Snapdeal, Amazon, Myantra, Jabong
  - **TV channels** – Music, Entertainment and Sports Channel
  - **Hoardings** - At Metro stations, CBD area, College Fests

2.11 FGD Summary

- Target group across all geographies in general prefers branded apparel specifically for formals in order to ensure quality with all respect.

- Fabric quality is an important determinant for choosing an apparel but design and colour is more important in case of home furnishing products

- The target group is ready to pay for good quality products even if it is on the higher side for apparel of their choice.

- Handloom products were not popular amongst the target group with limited usage, however they are aware of difference between power loom & handloom in literal sense. Home furnishing products are more preferred as Handloom buy.

- Handloom products are perceived as unique, different, expensive and scarcely available product which are used mostly in festive occasions and as traditional wear.

- Maintenance of handloom products was cited as most disadvantageous. To popularize handloom products within the younger generation, the look, design and variety of the products have to be improved.

- Social media and online shopping sites would be the ideal way to popularize handloom products within the young generation of India.

- Most importantly, though handloom products have limited usage within the new generation, there is a strong sense of patriotism with the product. People relate handloom products as a brand “made in India” and feel proud to be associated with it.

CHAPTER III: FGD & DI insights implementation in quant questionnaire

3.1 Key take outs implemented in Quant questionnaire

Learning from qualitative research via FGDs and DIs were incorporated appropriately in the quantitative questionnaire to formulate the semi structured research tool for conducting the primary survey across 13 cities in the country.

a. **Profile check of the respondents**

The following parameters in addition to the selection criteria predetermined were included in the questionnaire in order to ensure right TG:

- Type of house ownership
- Format of present residence
- Permanent address
- No. of earning members in the family
- Occupation

b. **Categorization of dress codes**

Both DI and FGD suggested broad categorization of dress codes people generally wear. We had incorporated the categorization accordingly in all questions so that it is easy for the respondents to relate with the same. The categories were:

- Formal wear
- Casual wear
- Traditional wear

c. **Other inclusions**

- Minimal Maintenance had been incorporated as one of the important parameters
- List of type of dresses have been extracted from FGD & DI outcome
- Digital media have been added in the awareness media question as per the outcome of FGDs & DIs

CHAPTER IV: Quantitative survey analysis

4.1 Respondent profile - Demographics

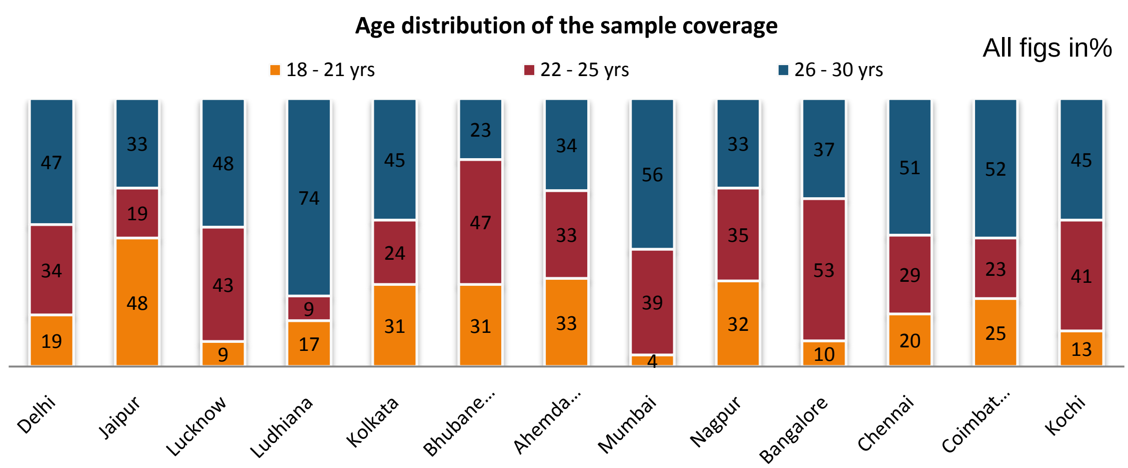
2,933 respondents were covered in the quantitative survey distributed across 13 cities including 5 metro cities and 8 tier I cities in the country. The overall ratio of Male: Female respondents were 58:42. Overall age distribution 18-21yrs:22-25yrs:26-30yrs across the cities was in tune of 20:34:46. The city wise distribution of sample coverage is shown in the table below:

Table 4.1 Sample distribution or quantitative survey across 13 cities

City	No. of respondents covered	% coverage		
		respondents	Male	Female
Delhi	463	16	49	51
Jaipur	172	6	75	25
Lucknow	172	6	39	61
Ludhiana	174	6	71	29
Kolkata	172	6	55	45
Bhubaneswar	172	6	52	48
Ahmedabad	167	6	48	52
Mumbai	477	16	60	40
Nagpur	172	6	53	47
Bangalore	215	7	57	43
Chennai	234	8	66	34
Coimbatore	172	6	55	45
Kochi	172	6	91	9
Total	**2933**	**100**	**58**	**42**

The age distribution across the target group is shown in the graph below:

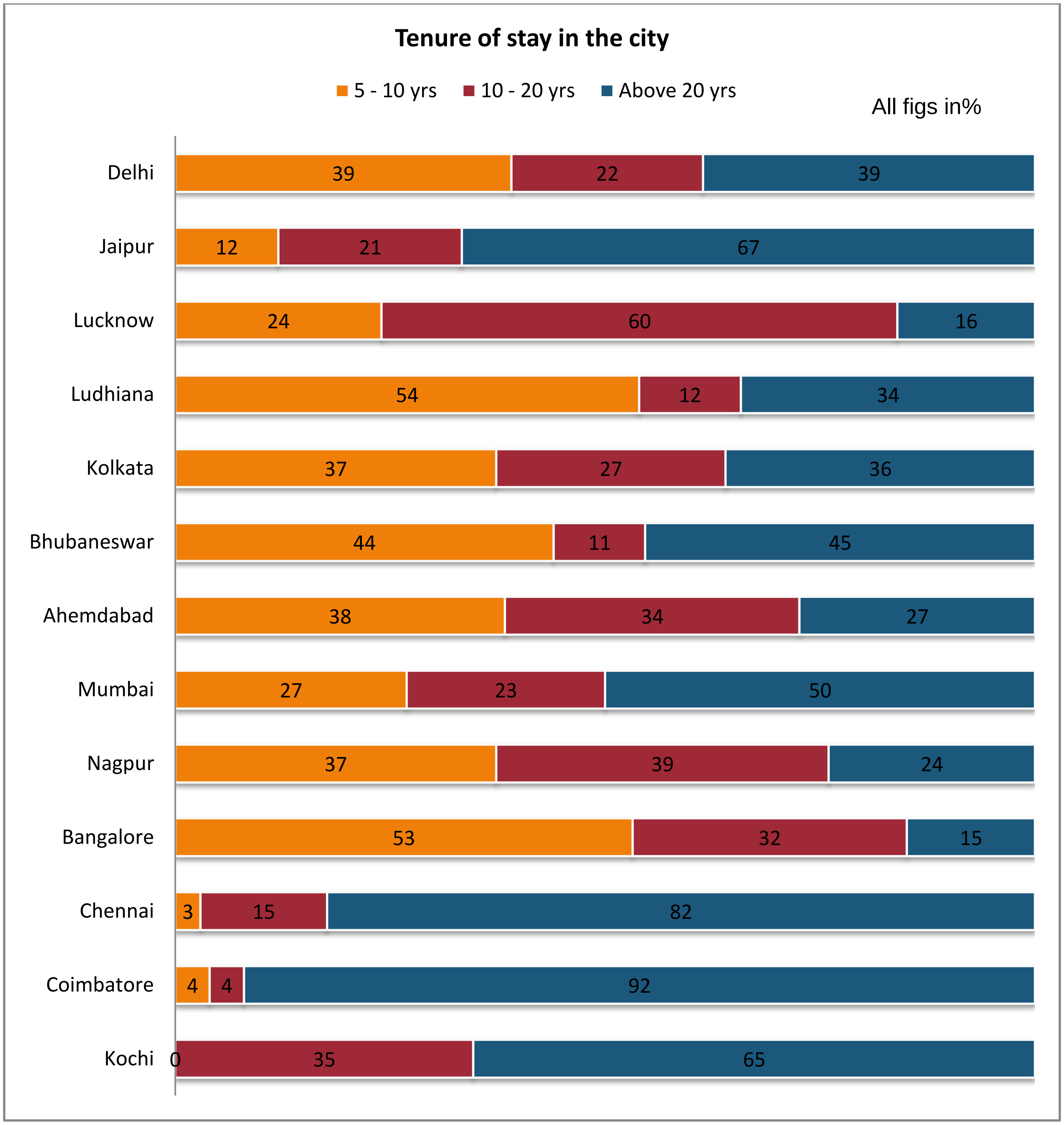
Fig 4.1 Age distribution of sample coverage



4.2 Respondent profile: Residential details

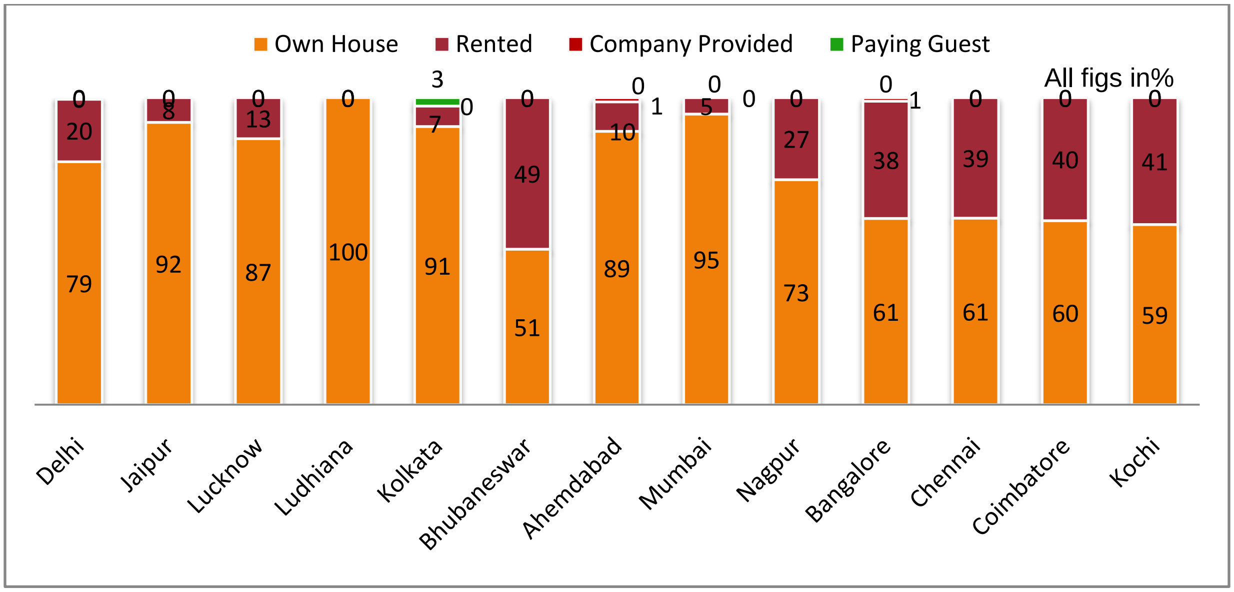
a. The overall ratio for the tenure of stay 5-10yrs: 10-20yrs:>20yrs was in the tune of 29:25:46 which suggested around 70% respondents were permanent residents of the respective cities and the right audience representing the cities culture, heritage and life style.

Fig 4.2Tenure of stay in the survey city



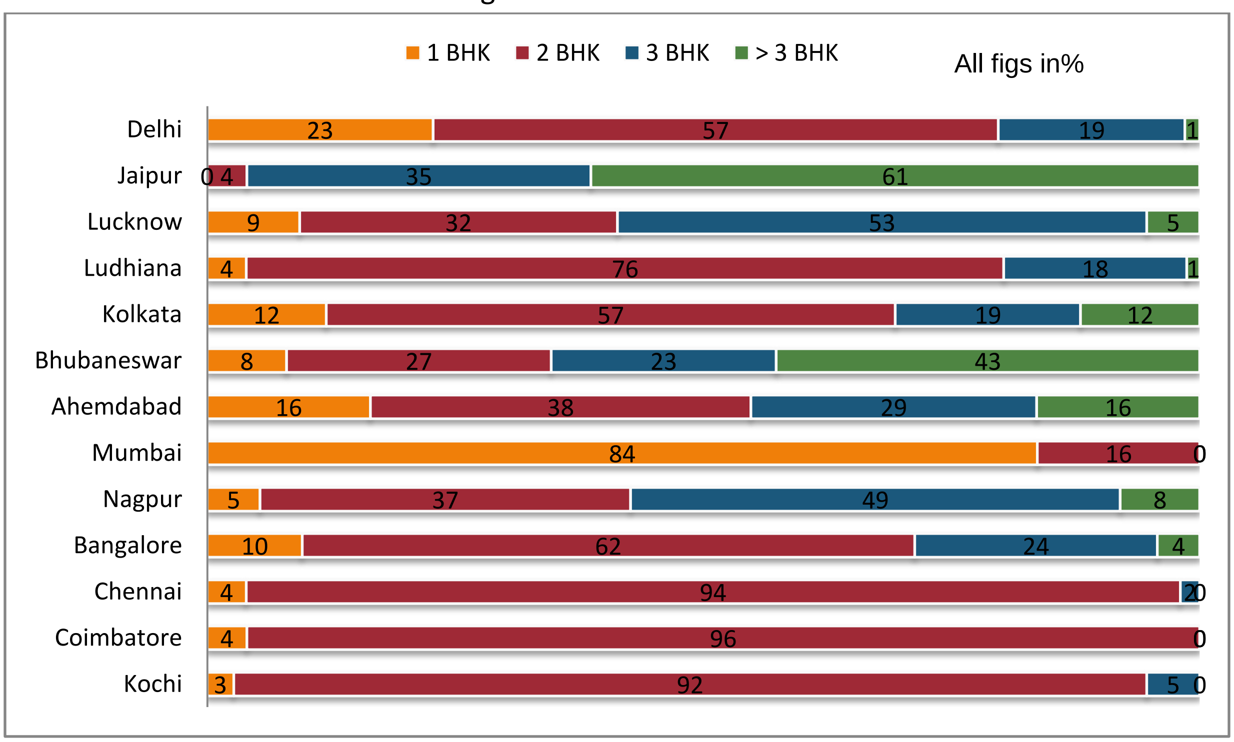
b. The overall type of house ownership suggested 78% to be residing in their own house which is an indicator that right income group targeted and permanent resident of the city.

Table 4.3 Type of house ownership



c. Overall 69% of the total respondent covered in the survey were found to reside in a 2BHK or a 3BHK house indicating that the sample coverage to belong to the right income group targeted in the survey.

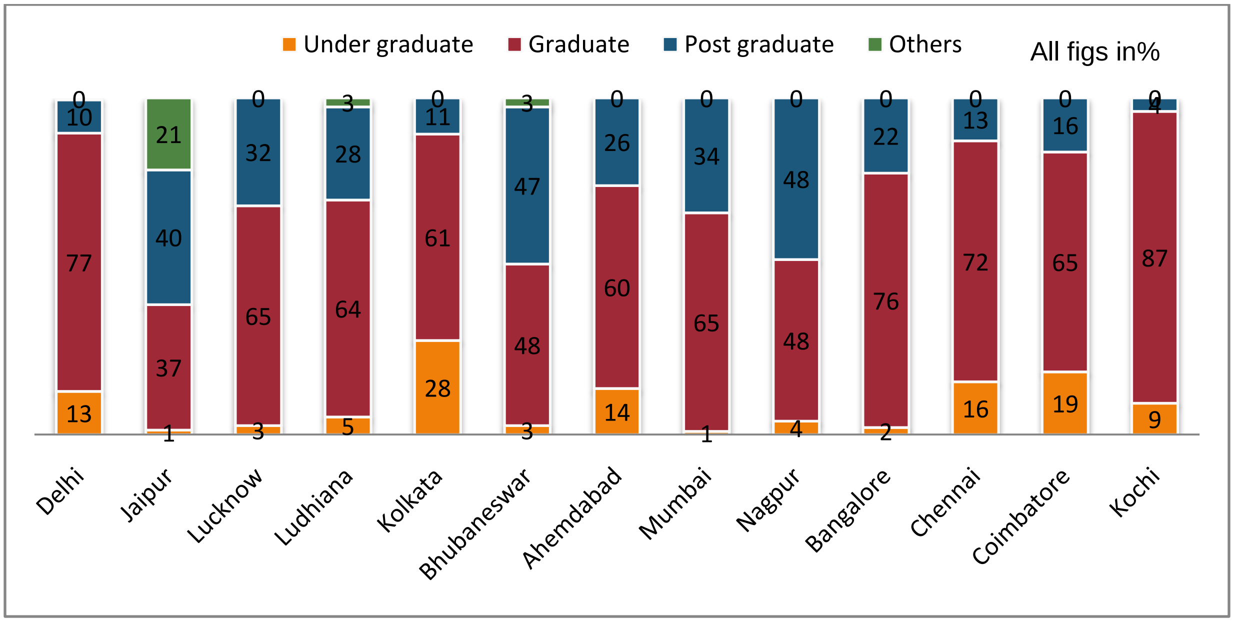
Fig 4.4 Format of residence



4.3 Respondent profile: Socio economic details

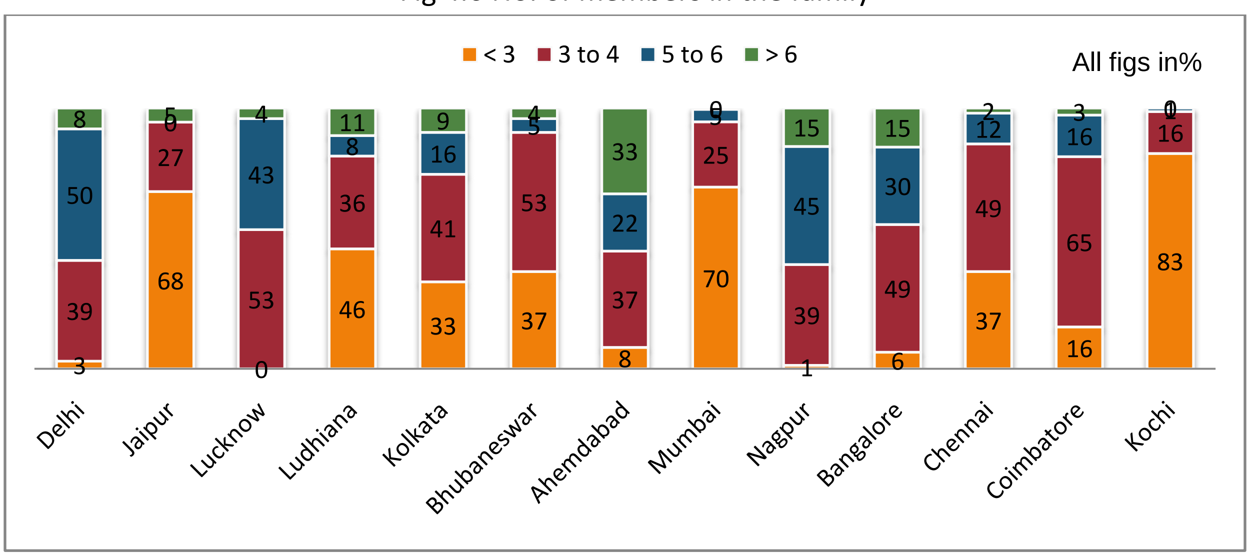
a. 91% of the overall respondents covered were graduates and above indicating the coverage to comprise of educated young people

Fig 4.5 Education levels



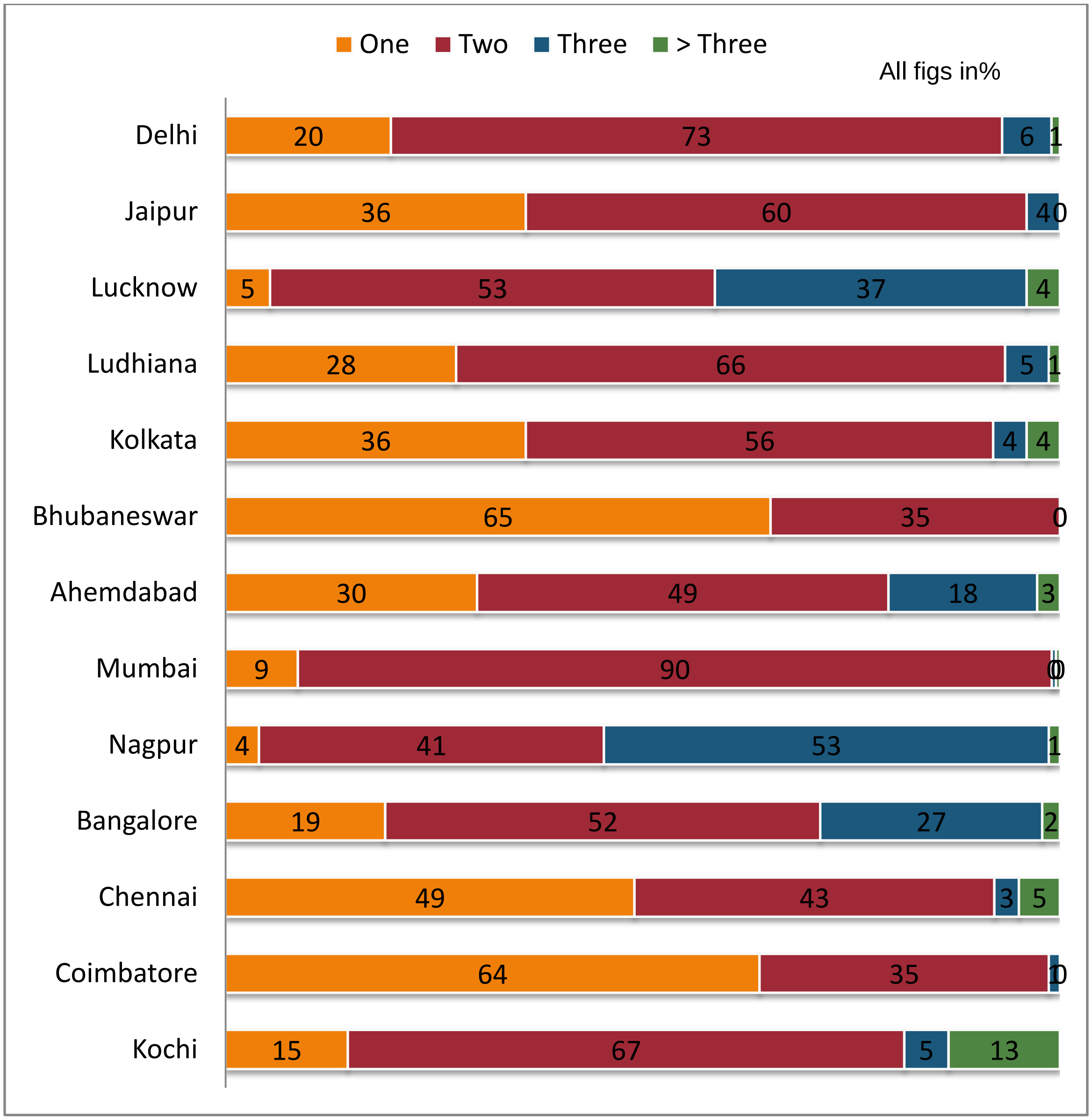
b. Majority of the respondents had 3-4 family members indicating urban strata of the socio economic group that has been covered in the survey.

Fig 4.6 No. of members in the family



c. 74% of the overall respondents covered were having =>2 members earning in the family indicating the right economic profile targeted for the survey

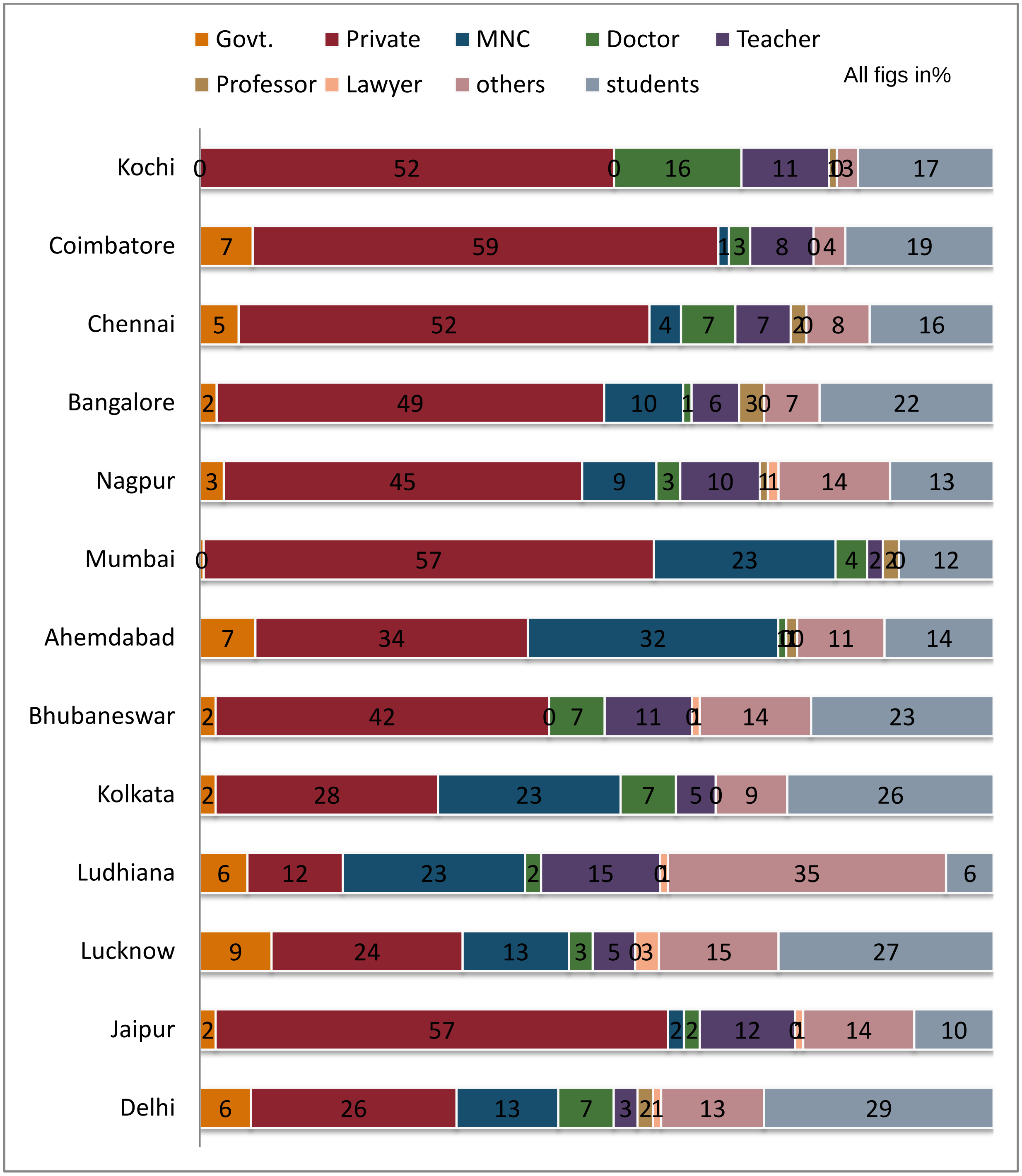
Fig 4.7 No. of earning members in the family



4.4 Respondent Profile : Occupation

Other than employed and self-employed respondents, students were also covered in the survey in the relevant age group. The occupation of the target respondents covered is shown in the figure below:

Fig 4.8 Occupation of the respondents

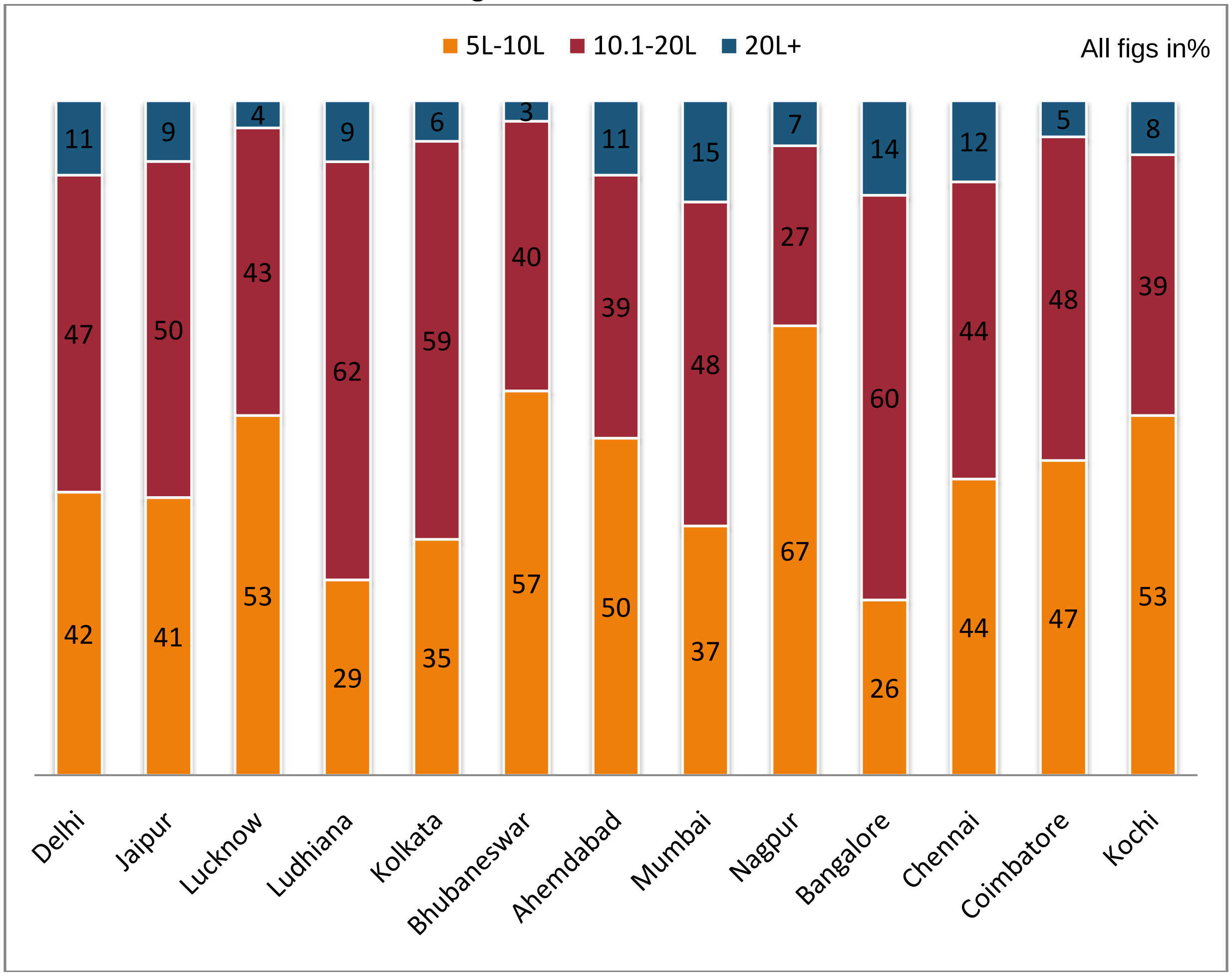


Others include business, self-employment, paramedical profession, home tutors etc

4.5 Respondent Profile : Household income profile

Household income was taken into consideration as economic background of the family which has a direct impact on the pattern and spends on apparels purchased. The household income of the respondents was majorly within the income bracket of INR 20Lakh per annum.

Fig 4.9 Household income



4.6 Point of purchase for textile products: Branded Vs unbranded

a. For Men

Young affluent men were found to prefer branded products more in case of formal wear and casual wear than unbranded. In case of Metro cities,preference of branded products are much higher than that of the tier I & II cities. For traditional wear and home furnishing products both branded and unbranded are preferred generally.

Table No. 4.2 Preference of branded products for men

City	Formal Wear		Casual Wear		Traditional Wear		Home Furnishing Products	
	Branded	Un branded	Branded	Un branded	Branded	Unbranded	Branded	Un branded
Delhi	83	17	77	23	74	26	61	39
Jaipur	68	32	65	35	32	68	59	41
Lucknow	77	23	40	60	22	78	74	26
Ludhiana	46	54	35	65	38	62	37	63
Kolkata	84	16	80	20	68	32	66	34
Bhubaneswar	57	43	55	45	58	42	55	45
Ahemdabad	39	61	38	62	37	63	40	60
Mumbai	63	37	36	64	38	62	45	55
Nagpur	83	17	77	23	35	65	26	74
Bangalore	85	15	63	37	61	39	50	50
Chennai	67	33	66	34	72	28	32	68
Coimbatore	66	34	66	34	73	27	32	68
Kochi	67	33	67	33	69	31	32	68
Overall average	68	32	58	42	52	48	46	54

b. For Women

On an overall basis, young affluent women were found to prefer branded products more across all kind of apparel than unbranded. However, the preferences vary with the availability of more unbranded options like in Mumbai. For home furnishing products, both branded and unbranded are preferred generally with a slight inclination towards unbranded ones.

Table No. 4.3 Preference of branded products by women

City	Formal Wear		Casual Wear		Traditional Wear		Home Furnishing Products	
	Branded	Unbranded	Branded	Unbranded	Branded	Unbranded	Branded	Unbranded
Delhi	78	22	78	22	75	25	61	39
Jaipur	70	30	73	27	78	22	90	10
Lucknow	55	45	57	43	69	31	29	71
Ludhiana	46	54	38	62	37	63	45	55
Kolkata	70	30	62	38	58	42	51	49
Bhubaneswar	57	43	72	28	75	25	81	19
Ahemdabad	45	55	60	40	57	43	45	55
Mumbai	34	66	42	58	35	65	37	63
Nagpur	69	31	64	36	76	24	34	66
Bangalore	58	42	58	42	61	39	61	39
Chennai	68	32	68	32	79	21	28	72
Coimbatore	68	32	68	32	80	20	27	73
Kochi	68	32	64	36	77	23	30	70
Overall average	60	40	61	39	66	34	47	53

4.7 Dress code and material used

a. For Men

Dress codes for young men are limited, repeated in many occasions and generally cotton based. The table below illustrates dress codes and material preferred by men across all locations:

Table No.4.4 Dress code and dress material preferred by men

Regular use formals		Informal wear for evening parties		Marriage party		Casual wear for Vacations/ Trips		Festive season	
Dress Code	Dress material	Dress Code	Dress material	Dress Code	Dress material	Dress Code	Dress material	Dress Code	Dress material
Shirts	Cotton-90%; Tericotton-10%	Jeans	Denim-100%	KurtaPajama	cotton-76%; Silk-24%	Bermudas/ Shorts	Cotton-100%	KurtaPajama	Cotton-100%
Trousers	Cotton - 100%	T-shirts	Cotton-100%	Sherwani	Cotton-40%; Silk & Polyester-60%	Jeans	Denim-100%	Jeans	Denim-100%
Blazers	Wool-90%; Cotton & Silk-10%	Kurta-Pajama	Cotton-100%	Suit	Wool-100%	T-shirt	Cotton-100%	T -shirt	Cotton-100%
Suits	Wool-100%	Designer Shirts	Cotton-78%; tericotton-7%; Silk-5%			Polo Shirts	Cotton-100%		
						Jackets	Polyester& leather-10%; synthetic-90%		

b.For Women

Dress codes for young women for various occasions have numerous variants and preferred in cotton as well as various other fabric as per occasion. The table below illustrates dress codes and material preferred by women across all locations:

Table No.4.5 Dress code and dress material preferred by women

Regular use formals		Informal wear for evening parties		Marriage party		Casual wear for Vacations/ Trips		Festive season	
Dress Code	material	Dress Code	material	Dress Code	material	Dress Code	material	Dress Code	material
Shirts	Cotton-100%	Saree	Gorgette, Chiffon, crepe	Saree	Silk, Gorgette	Jeans	Denim-100%	Saree	Silk, Cotton, Handloom
Trousers	Cotton-100%	Designer salwars	Gorgette, Chiffon, crepe, cotton	Salwar Suits	Silk, Gorgette	Tops	Cotton- 100%	Salwar suit	Silk-40%, Cotton-60%
Salwar Suit	Cotton-100%	Jeans	Denim-100%	Lehenga	Silk, Gorgette	Kurti	Cotton- 100%	Kurti	Cotton-100%
Kurti	Cotton-100%	T-shirt	Cotton-100%	Dresses	Crepe, Gorgette, Silk, Cotton	Leggings	Lycra	Leggings	Lycra-100%
Leggings	Lycra-100%	Skirts	Gorgette& Chiffon-30%, cotton- 70%			salwar	Cotton- 100%		
Saree	Silk, Crepe, Cotton	Kurti	Cotton-100%			capri	Cotton- 100%		
		Tops	Cotton-85%; Synthetic-20%			Shorts	Cotton-90%;Denim-10%		
		Dresses	Crepe, Gorgette, Silk, Cotton			Skirts	Gorgette& Chiffon- 30%, Cotton- 70%		
						Dresses	Crepe, Gorgette, Silk, Cotton		

4.8 Key drivers for choosing a textile product

The key drivers for choosing a textile product as identified from the responses across various cities were Fabric quality, comfort, minimal maintenance and easy availability. "Durability" had a mixed response as people also do not like to continue with the same dress with the same design and would like to change their collection as per present trends. The key drivers for choosing a textile product varies with the cities covered as depicted below:

Table No. 4.6 Key driver for choosing a textile product

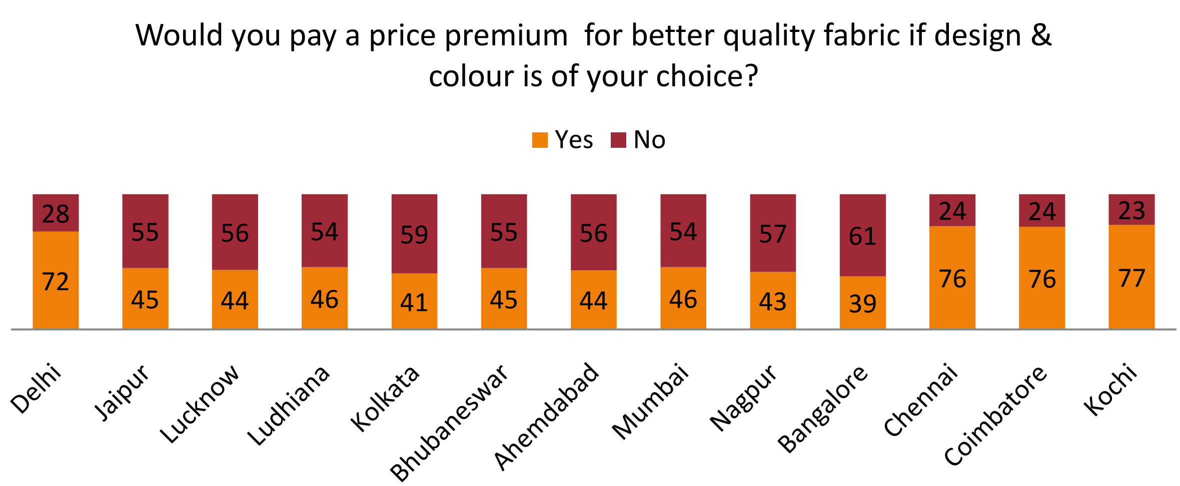
City	Fabric texture/ softness	Comfort	Durability	Variety of colours	Contemporary designs	Traditional designs	Easy availability	Minimal Maintenance
Delhi	62	64	58	46	45	44	42	41
Jaipur	51	65	47	53	43	36	53	53
Lucknow	88	57	49	59	75	76	48	72
Ludhiana	72	56	42	62	55	53	62	68
Kolkata	76	76	45	75	72	48	61	61
Bhubaneswar	71	63	73	53	61		59	49
Ahemdabad	99	94	78	81	88	86	53	71
Mumbai	100	92	81	80	87	83	50	76
Nagpur	85	57	48	68	83	77	61	71
Bangalore	74	50	41	53	54	49	49	55
Chennai	72	85	40	83	59	51	65	55
Coimbatore	83	81	40	83	71	51	64	63
Kochi	52	93	59	85	67	79	67	59

Most important	*Important*	*Good to have*	*Not so important*	*Not at all important*

4.9 Importance of fabric quality

Overall on an average 55% would like to pay a premium for better quality fabric if design and colour is of their choice.However, it seems from the trend of responses that though fabric quality is important, a product has to be rightly priced to ensure value for money to the customer.

Fig 4.10 Price premium for better quality fabric



4.10 Most frequently bought dresses

a. For Men

The most common buy for a young male would be shirts, T-shirts, trousers and Bermudas/ shorts. Trousers and Suits are largely preferred tailor-made.

Table No. 4.7 Frequently bought dresses by men

Type of dress	Average Approx. Nos. bought in a year	Readymade (%)	Tailor- made (%)
Shirts	7	61	39
Trousers	3	52	48
Blazers	*	100	0
Suits	*	33	67
Kurta	2	98	2
Sherwani	*	91	9
Jeans	2	100	0
T- Shirts	5	100	0
Shorts/ Bermudas	3	100	0
Pajama	2	97	3

**Not bought regularly*

b. For Women

The most common buy for a young female would be shirts, Tops, Kurtis, Salwar Suits, sarees, leggings. Other than salwar suits, all variant are bought readymade.

Table No. 4.8 Frequently bought dresses by women

Type of dress	Average Approx. Nos. bought in a year	Readymade (%)	Tailor- made (%)
Shirts	5	100	0
Trousers	2	100	0
Blazers	*	100	0
Suits	*	100	0
Skirts	2	100	0
Tops	9	100	0
Kurtis	8	90	10
Salwar suit	7	52	48
Capris	1	100	0
Jeans	2	100	0
T- Shirts	2	100	0
Leggings	6	100	0
Palazzo	1	100	0
Shorts	1	100	0
Sarees	5	100	0

4.11 Handloom products: awareness

a. Usage trend of handloom products:

Majority of the respondents across the cities have during some or the other time used handloom products. The table below illustrates usage trend of handloom products in various cities within the respondents

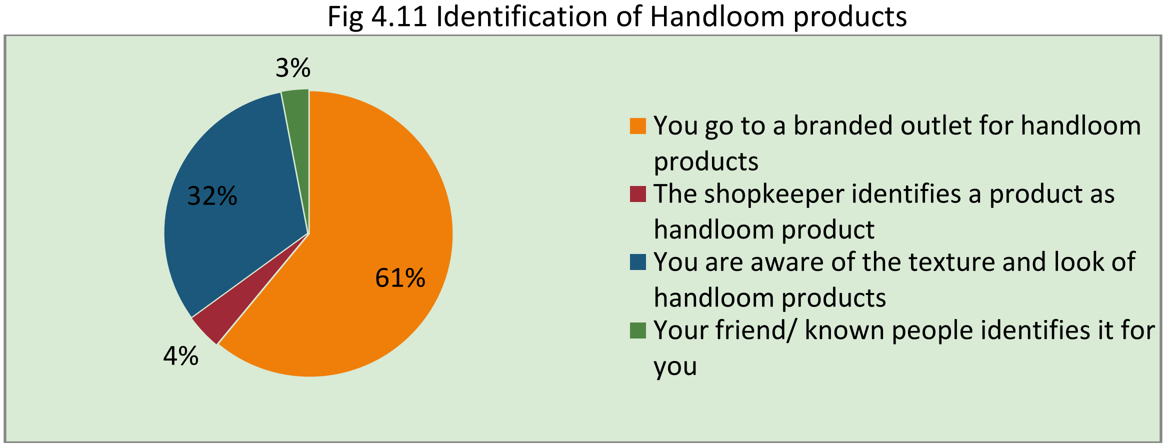
Table No. 4.9 Usage trend of handloom products

City	Yes %	No %
Delhi	22	78
Jaipur	97	3
Lucknow	93	7
Ludhiana	28	72
Kolkata	88	12
Bhubaneswar	49	51
Ahemdabad	70	30
Mumbai	49	51
Nagpur	93	7
Bangalore	81	19
Chennai	100	0
Coimbatore	100	0
Kochi	100	0
Overall	67	33

b. Identification of handloom products

Majority of the respondents across the cities visit a branded shop (like Fab India, State Handloom showrooms, KhadiBhandar,etc) to buy handloom products

Fig 4.11 Identification of Handloom products



4.12 Handloom products: Usage

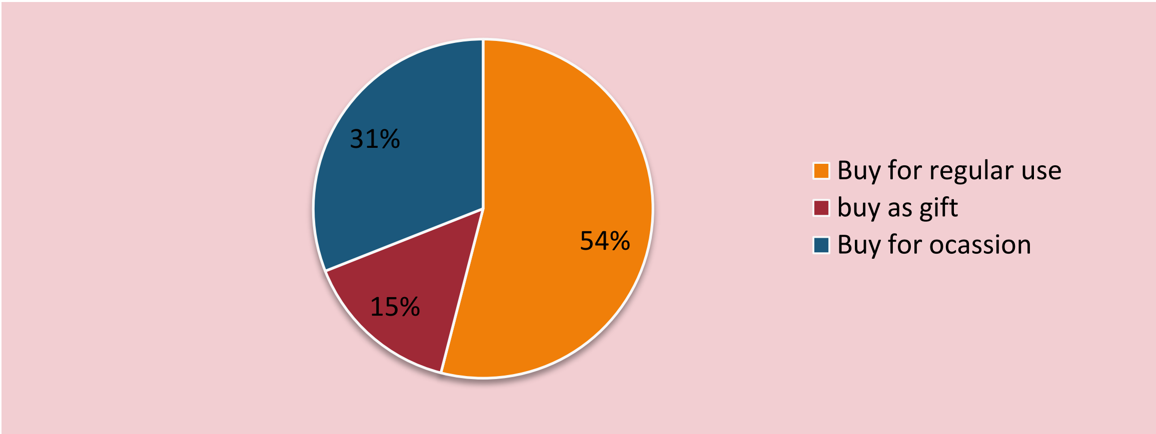
- When it comes to usage there are specific products that are generally preferred buying from handloom collection.
- Home furnishing products like bed covers, bed sheets, cushion covers are very much preferred by the respondents.
- Regarding apparel, Pajama-Kurta for men and Sarees-Kurtis for women are the hot picks.
- Scurf and stoles are also bought by around 37% of the respondents
- Formal wear like shirts are not generally bought from handloom collection

Table No. 4.10 Type of Handloom products used

Handloom products	% of respondents bought
Shirts	12%
Waist Coats/ Modi coats	14%
Pajama	36%
Kurta	42%
Skirts	27%
Tops	28%
Kurtis	42%
Salwar suit	9%
Dupattas	19%
Scurf's/ Stoles	37%
Saris	45%
Bed sheets	54%
Bed covers	41%
Cushion covers	37%
Table cloth/TV covers etc	17%
Hand towels	10%

Regular use handloom products generally comprises of home furnishing products and Kurta – pajama, Kurtis and Sarees as occasional wear.

Fig 4.12 Purpose of buying Handloom products



4.13 Handloom products : comparative perceptions

Handloom products are perceived as better quality fabric that is soft, comfortable and durable which is expensive but not quite suitable in all climatic conditions specifically in the rainy season. Traditional designs of handloom products are appreciated whereas lack of contemporary designs and maintenance is an issue raised.

Table No. 4.11 Comparative perception of Handloom products across locations

Cities	Fabric quality	Fabric softness	Comfort	Colour variety	Contemporary design	Traditional design	Durability	Price	Availability	Status symbol	Suitability for all climatic conditions	Minimal maintenance
Delhi	51	65	57	47	51	60	44	51	70	69	46	58
Jaipur	57	72	61	49	59	67	44	53	71	67	40	52
Lucknow	49	67	59	44	52	61	43	49	71	65	45	52
Ludhiana	51	68	59	46	54	63	43	54	70	67	46	55
Kolkata	49	65	60	43	52	60	41	51	72	71	44	57
Bhubaneswar	51	72	57	48	56	63	43	55	71	75	48	57
Ahemdabad	52	66	58	48	51	58	47	52	73	74	44	59
Mumbai	52	69	61	43	55	64	41	52	71	69	43	54
Nagpur	49	69	59	45	57	65	41	53	69	72	41	60
Bangalore	51	68	56	46	56	60	43	56	69	72	45	57
Chennai	50	64	53	43	48	55	38	58	62	73	44	55
Coimbatore	49	63	49	40	45	52	37	64	56	72	47	55
Kochi	60	71	61	55	57	64	47	47	73	71	37	53

Superior	*Better*	*Same as*	*inferior*	*Not good at all*

4.14 Handloom products: drivers & motivators

Fabric related attributes of handloom products are well acknowledged by the target group but at the same time limited designs, colours and high maintenance leads to limited usage of the same within the young generation of the country. The drivers and demotivators of using handloom products are listed below:

Drivers

- Fabric quality
- Softness
- Comfortable
- Unique design
- Durability
- Traditional designs

Demotivators

- High Maintenance
- Lack of contemporary designs
- Lack of different colour combinations
- Price very high
- Lack of availability
- Not suitable for all occasions/climatic conditions

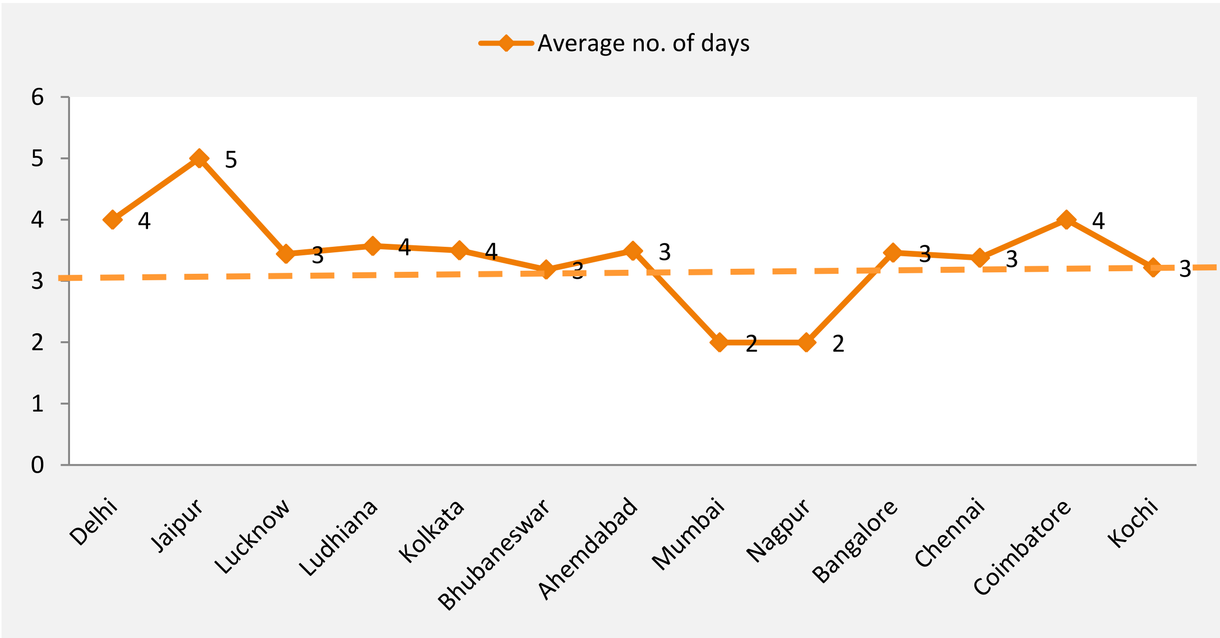
4.15 Delivery time allowed for quality product

Majority of the respondents were ready to bear a little more time for delivering quality products as shown in the figure below:

Fig 4.13 Delivery time for quality product

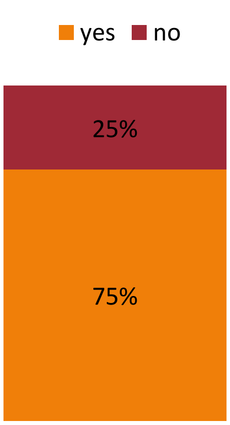
For unique, customized and comfortable handloom dresses the target group were ready to allow a delivery time of around 3 days. Hence, there exists immense scope and potential for handloom products to enhance its acceptability and usage within the target group covered in the survey

Fig 4.14Average no. of days allowed for delivery of customized handloom product



4.16 Endorsement

Do you think endorsement by an Indian Icon as a brand ambassador can boost usage of handloom products?



75% of the respondents strongly felt that an endorsement by a celebrity could definitely boost the usage and attitude towards Handloom products to a great extent. The most mentioned celebrities' ideal for promoting and representing the brand "India Handloom" are listed below in their order of preference:

- NarendraModi
- Amitabh Bacchan
- ViratKohli
- MS Dhoni
- AishwairyaRaiBacchan
- KareenaKapoor Khan
- Priyanka Chopra
- DeepikaPadukon

4.17 Media habits

Target respondents were found to be quite tech savvy and widely use online services including online e-commerce sites and social media which were found to the most prominent source of awareness for textile products and brands. Outdoor activities like hoarding and exhibition/ fairs too are a good source of information preceded by TV ads.

Table No. 4.12Media habits

City	News-paper	Magazines	Hoardings	Banners	TV ads	Digital ads	Radio jingle	Road shows	Exhibition / fairs
Delhi	10	16	34	11	7	100	0	0	23
Jaipur	32	1	5	1	33	75	0	0	24
Lucknow	29	17	15	3	92	93	1	4	7
Ludhiana	23	11	14	7	72	87	0	0	0
Kolkata	15	41	33	13	57	98	4	3	23
Bhubaneswar	31	5	23	8	8	75	0	1	55
Ahmedabad	8	18	32	14	82	88	0	11	12
Mumbai	9	34	9	1	7	100	4	1	1
Nagpur	27	20	13	31	79	89	0	7	16
Bangalore	4	16	37	15	66	100	0	6	29
Chennai	19	2	6	1	94	100	0	1	28
Coimbatore	27	3	4	1	93	96	0	1	23
Kochi	41	3	12	0	95	100	0	0	40
Overall average	**21**	**14**	**18**	**8**	**60**	**92**	**1**	**3**	**22**

All figs in %

CHAPTER V: Key Insights

5.1 Awareness and usage of Handloom products within the young generation

- The educated vibrant youth of the country were found to be aware of handloom products in literal sense but are limited users of the same. Handloom products are more used as home furnishing than apparels.

- The major reason for non-popularity of handloom products is its limited availability and near about nil publicity. With the advent of numerous branded products in apparel, both indigenous and international, product promotion is the key to awareness and thereby translates into direct purchase.

- Handloom products with little of innovation have stood still with its same old designs and collections whereas the other apparel brands have been innovating with their ever new collections to do away with boredom and stagnancy; thus create the desired appeal for the younger generation.

5.2 Uniqueness of handloom products acknowledged by the target group

- The commendable take away from the survey was that inspite of the advent of newer brands every day, handloom products are still well appreciated by the young Indiansprimarily because of its unique design patterns, excellent fabric quality and a wholesome different overall look. Indian climate is mostly hot round the year and handloom products being airy are the ideal fabric to put on.

- The different look of handloom fabric had been appreciated across cities; however, the same also restricts it from being used for all occasions. Because of its mature and dignified look, most people prefer to wear handloom only on festive season and specific office meetings.

5.3 Challenges of handloom products as perceived

- The survey had identified certain specific drawbacks of handloom product which misfits in today’s fast life. Handloom products need high maintenance which is a time killer and hence avoided as a formal wear by majority of the younger generation.

- Additionally, handloom products come in limited traditional designs and colour combinations which does not fit the fashion statement of the younger generation who are exposed to host of other options in the market.

5.4 Potential for Handloom products

- The survey suggested that today's younger generation do not mind spending an extra bit for a better product specifically apparel for regular use. Handloom being expensive thus has the potential to penetrate the market with its product quality and customization as per the demand.

- Fabric quality has been registered as the most important factor for choosing a particular textile product and handloom already scores high in this parameter; hence, the need to enhance the potential of the product to tap the market.

- Moreover, though contemporary designs are more sought after, traditional unique designs of handloom were also quite appreciated across the cities and this could be leveraged accordingly.

5.5 Preference for branded apparel within the young generation

- The target group exhibited a strong affinity towards branded apparel be it formals, casuals or traditional wear. Home furnishing too was a preferred brand to a certain extend as it is believed to enhance the overall status symbol of the house.

- Branded products were seen to be preferred as it guarantees the quality, finishing and fit of the product. Even presently, the target group visits branded shop of handloom products whenever they plan to buy some. Thus, a brand association with handloom products would help boost demand in the market.

5.6 Effective media for brand promotion

- E-commerce is the new buzz of the country and apparel shopping; thus information is highly depended on the digital media. Social media is found to be one of the most effective media to promote fast moving apparel products as the young generation are glued to such promotions.

- TV ads and outdoor media too play a fair role in awareness building exercise along with exhibition and fairs.

Chapter VI: Way Forward

6.1 Brand Promotion

Short term	Long term
▪ Promote the brand "India Handloom" focusing on its fabric quality, comfort, Indian heritage and eco friendliness and reach as many markets as possible initiating with metro cities. ▪ Use digital media and outdoor media to start with for creating awareness and registering the brand "India Handloom" as TOM ▪ Periodically check the effectiveness of brand publicity activities by brand track studies within the target group and take necessary corrective actions based on the outcome	▪ Extend brand publicity activities for handloom products in Tier I and Tier II cities incorporating corrective actions based on outcome of periodic brand track studies. ▪ Extend brand publicity in audio visual media along with digital and outdoor media

6.2 Ensuring availability

Short term	Long term
▪ Along with the existing retail outlets of handloom products, distribute handloom products via branded retail chains like Big Bazaar, Pantaloons, Shoppers Stop, Lifestyle, etc.in order to ensure faster reach to the target customers. ▪ Introduce online store for brand "India Handlooms" as well as ensure availability via popular e-commerce sites like Amazon, Flipkart, Snapdeal, etc.	▪ Expand via more exclusive branded handloom outlets in shopping malls and popular high street corners of each city

6.3 Design and look improvisation

Short term	Long term
▪ Launch Indo-western dresses using handloom material and create exclusive collections for casual wear ▪ Launch branded formal shirts for men using handloom material as this is the most frequently bought dress. Leverage goodness of the fabric quality of handloom to promote this as the most comfortable branded shirt	▪ Involve nationally reputed designers to use brand “India Handloom” products in their collection to create exclusivity ▪ Introduce fusion designs by merging traditional and contemporary design in women’s wear

6.4 Pricing

Short term	Long term
▪ Create an economical range of handloom products for daily use so as to increase usage of the same	▪ Create exclusive range with heavy work and traditional designs along with economical range specifically for festive season and occasions like marriages, etc.

List of Tables, Charts and Graphs

List of Tables

Table No.	Description	Pg No.
1.1	Sample coverage	13
2.1	Preference for branded and unbranded products across cities	18
4.1	Sample distribution for quantitative survey across 13 cities	29
4.2	Preference of branded products for men	36
4.3	Preference of branded products for women	37
4.4	Dress code and material preferred by men	38
4.5	Dress code and material preferred by women	39
4.6	Key driver for choosing a textile product	40
4.7	Frequently bought dresses by men	41
4.8	Frequently bought dresses by men	41
4.9	Usage trend of handloom products	42
4.10	Type of handloom products used	43
4.11	Comparative perceptions of handloom products across locations	44
4.12	Media habits	47

List of Figures

Fig No.	Description	Pg No.
4.1	Age distribution of sample coverage	29
4.2	Tenure of stay in the survey city	30
4.3	Type of ownership of house	31
4.4	Format of Residence	31
4.5	Education levels	32
4.6	No. of members in the family	32
4.7	No. of earning members in the family	33
4.8	Occupation of the respondents	34
4.9	Household income	35
4.10	Price premium for better quality fabric	40
4.11	Identification of handloom products	42
4.12	Purpose of buying handloom products	44
4.13	Delivery time for quality product	45
4.14	Average no. of days allowed for delivery of customized handloom products	46

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