

# The Premium Tech Universe of India

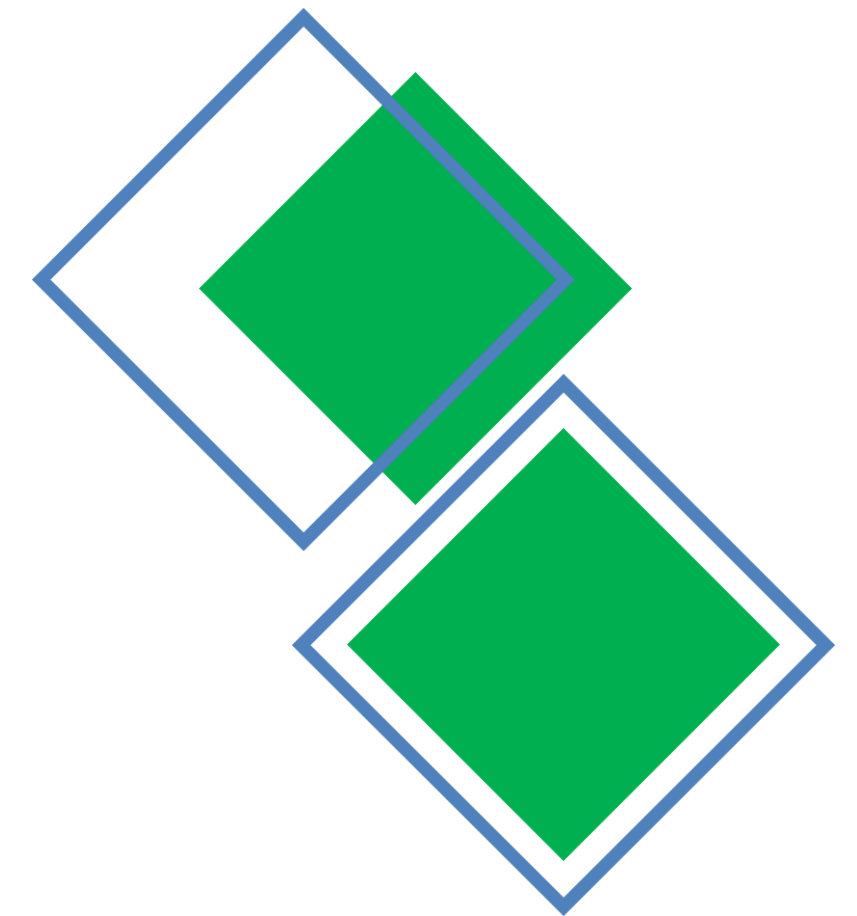


September, 2022





# Preface

This report, based on a survey among premium android technology users in India outlines their usage and preferences making them a distinct segment than the mass technology users. The report covers 4 high penetration smart devices of smartphones, smart TV, TWS buds and smart watch.

The report establishes the constitution of the premium tech lifestyle universe, its elements and the key players driving this segment where the intent is not just enabling or provisioning of the devices but a holistic rich, immersive and integrated experience.

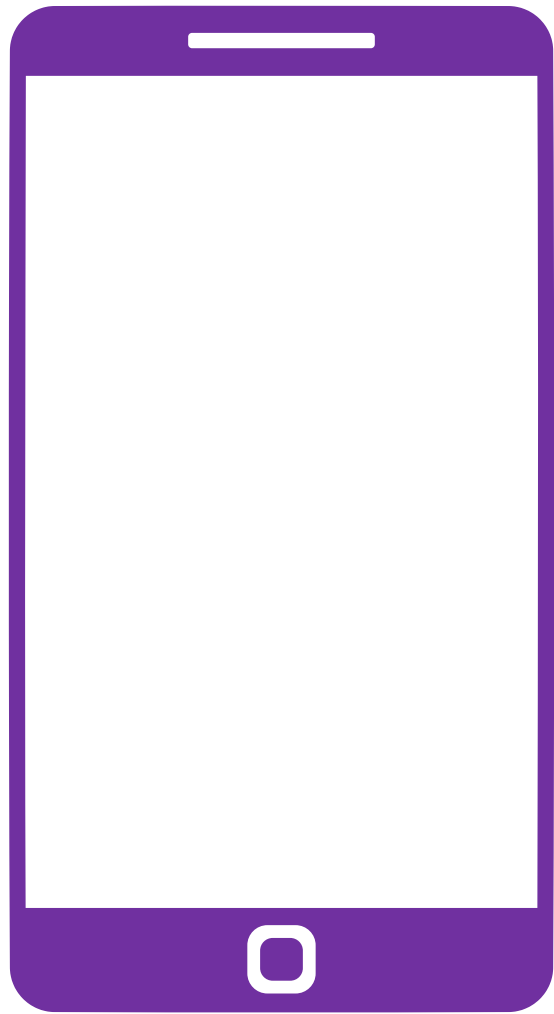


## OnePlus features with the premium stalwarts in respective categories

 Smartphone	 Smart TV	 TWS	 Smart Watch
<ul style="list-style-type: none"> <li>▪ OnePlus</li> <li>▪ Samsung</li> <li>▪ Xiaomi</li> </ul>	<ul style="list-style-type: none"> <li>▪ Samsung</li> <li>▪ LG</li> <li>▪ Sony</li> <li>▪ Redmi</li> <li>▪ OnePlus</li> </ul>	<ul style="list-style-type: none"> <li>▪ JBL</li> <li>▪ OnePlus</li> <li>▪ Sony</li> <li>▪ Samsung</li> <li>▪ Noise</li> </ul>	<ul style="list-style-type: none"> <li>▪ Samsung</li> <li>▪ Garmin</li> <li>▪ Fossil</li> </ul>

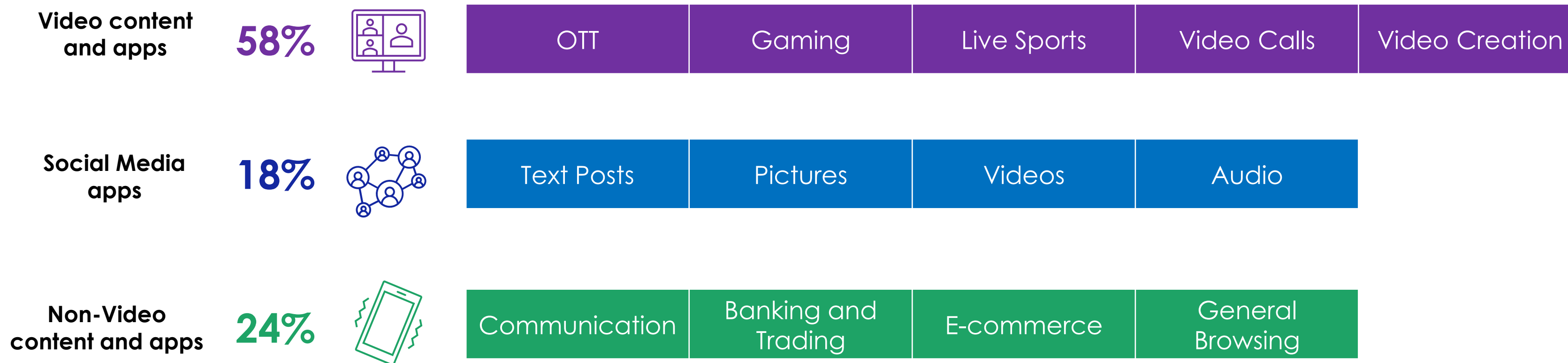
In smartphone, which still is over 72% of the market value of these four key smart tech products, OnePlus has established itself as a premium brand in the league of incumbents like Samsung. In the android based premium segment, OnePlus emerges as the leader.

Taking this pedigree forward, OnePlus is also featuring along with respective stalwarts of different smart products in leadership positions. This not only establishes its popularity as a premium brand but also validates its superiority in quality and trustworthiness that the premium users are investing in it to derive similar or better experience.



Smartphone

# Video consumption is on the rise and becoming preferred content type in the premium segment driving innovation in display and battery functions of the smartphones.



With video-based content and apps usage on rise in the premium segment, features such as Fluid AMOLED screen, higher aspect ratio (>21.9), 120 Hz refresh rate for gaming, HDR Display, fast charging and colour enhancement features become pivotal for rich, immersive and premium experience.

## Among leading premium smartphone users, OnePlus owners consume highest video-based content.

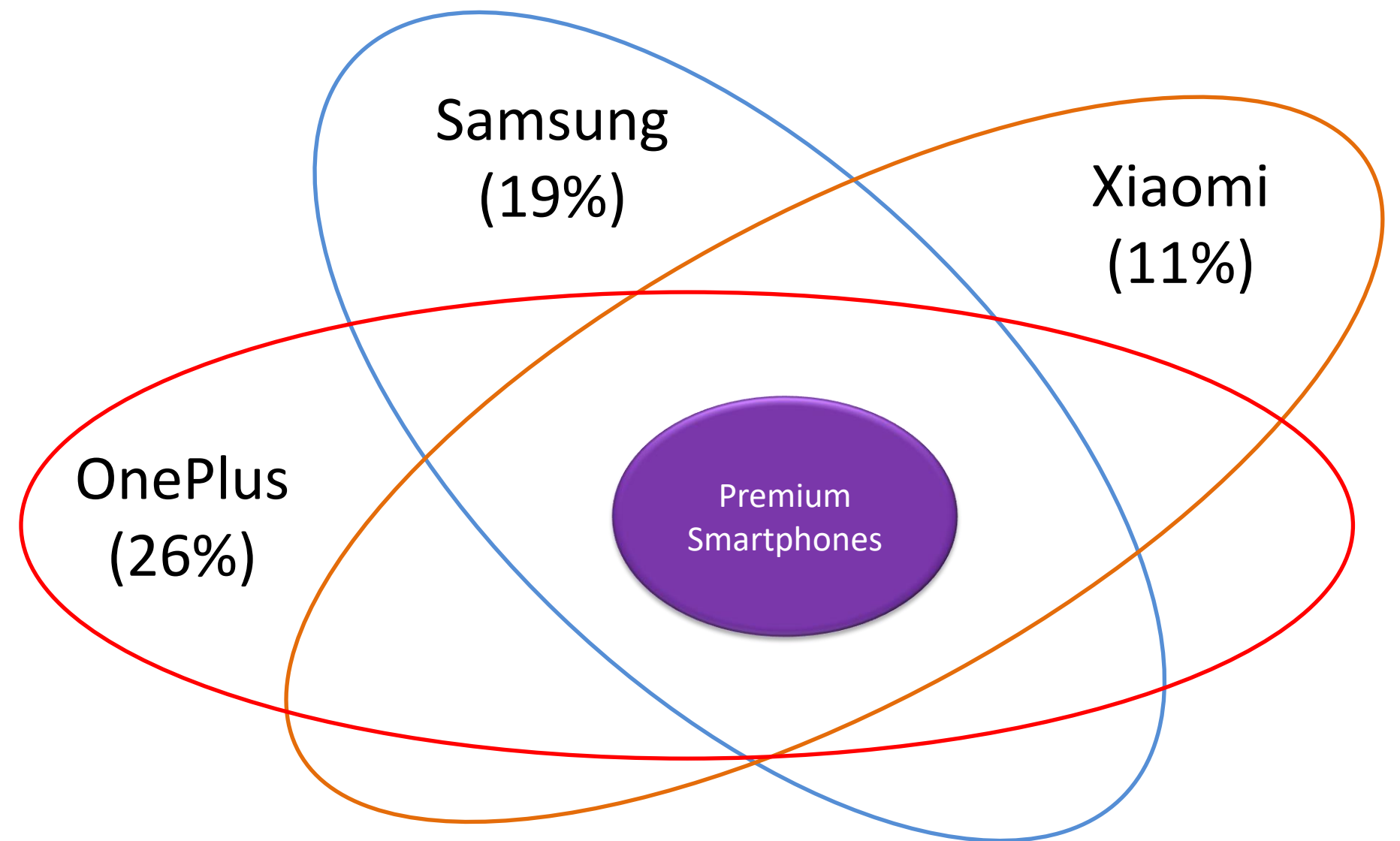
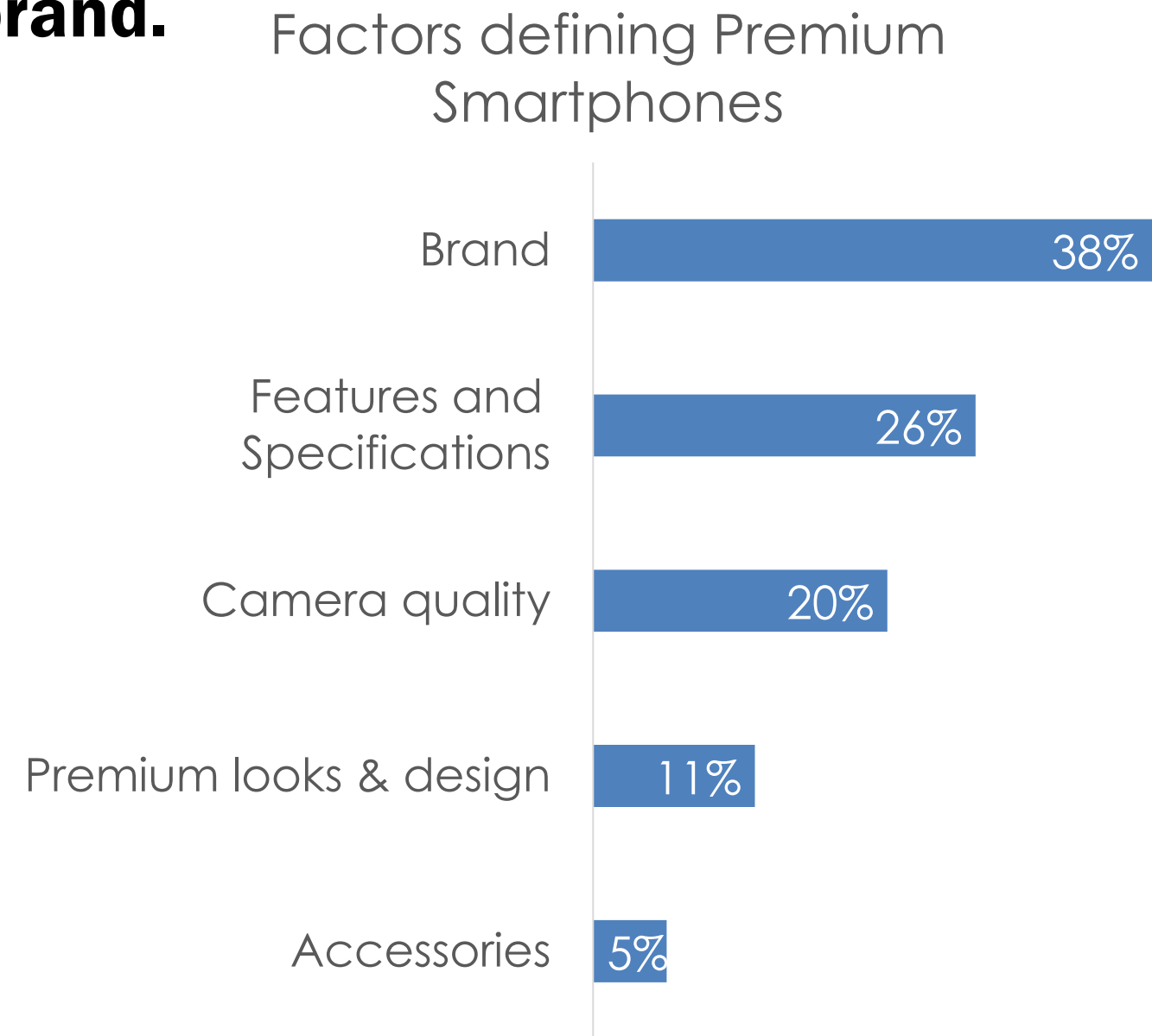
	OnePlus	Samsung	Xiaomi
Video	62%	60%	51%
Non-Video	23%	21%	22%
Social Media	15%	18%	27%

OnePlus as a premier brand has focused on immersive and rich content consumption experience by loading its smartphones with top notch specifications with regards to display, processor, etc.

This is encouraging the brand users to consume more video than its competition in the premium segment.

Brand	Model	Display			Battery	
		Size in inches	Resolution	Aspect Ratio	Battery Capacity	Fast Charging
One Plus	OnePlus 10 Pro	6.7	3216 x 1440	20.1:9	5000 mAh	50 W
Samsung	Galaxy S22+	6.6	2340 x 1080	19.5:9	4500 mAh	45 W
Xiaomi	Xiaomi 12 Pro	6.73	3200 x 1440	20.1 : 9	4500 mAh	50W

# Other than the incumbent Samsung, OnePlus is a recognized premium smartphone brand.

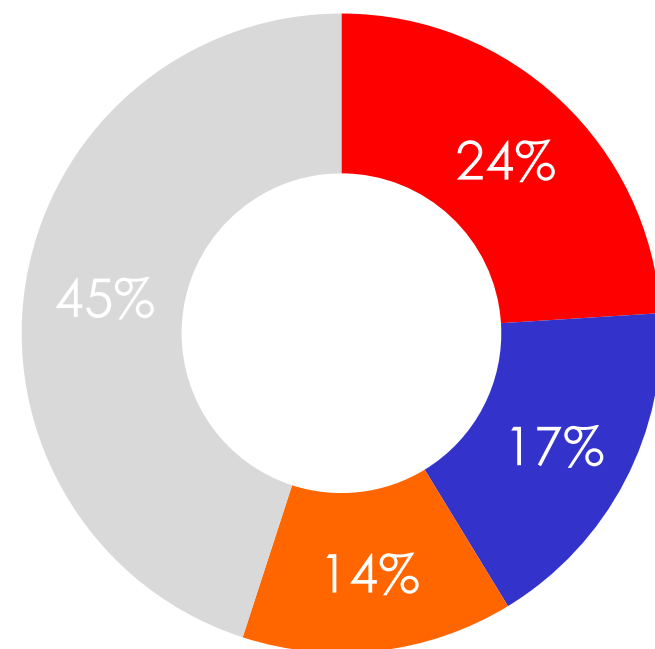


**More than half of the premium users are owing either OnePlus, Samsung or a Xiaomi Smartphone.** Brand precedes everything else in defining premium as it inherently brings in trust and reliability with regards to quality, features and the overall proposition.



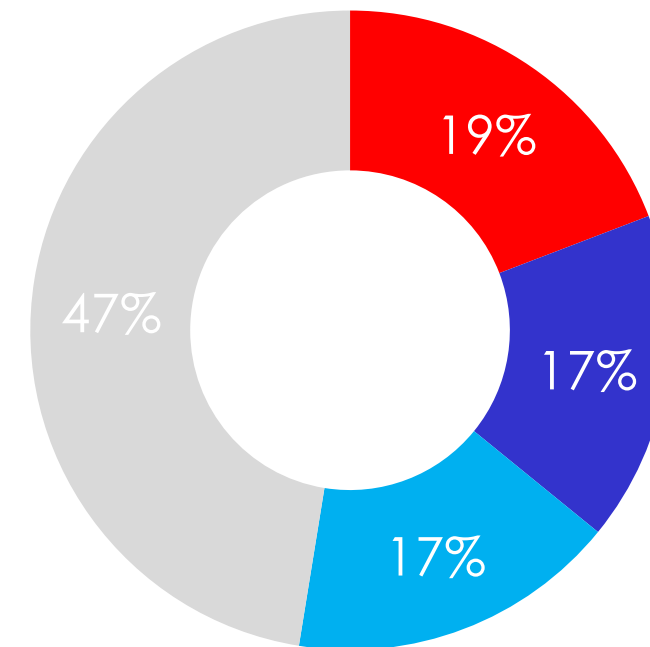
## Aspirational value of the brand and longer model shelf life has led these brands to rule the premium universe

Aspirational Premium Smartphone Brands



■ OnePlus ■ Samsung ■ Xiaomi ■ Others

Premium Brands with Longer Model Shelf Life\*



■ OnePlus ■ Samsung ■ Vivo ■ Others

**OnePlus, Samsung and Xiaomi have been able to develop a cult among premium smartphone buyers who aspire to become its users.** At the same time, the existing users are able to use their premium models for longer durations maximising their returns on the investment. In India the premium user is also value driven and appreciates brands who can help maximise the returns even in the premium segments.

\* Defined as users having either not changed or less than 2 in the past 3 years.

## Contrary to premium and luxury brands not selling online in many categories, smartphones are primarily bought online by the premium users

Online

82%



Marketplaces	E-stores	Others
82%	7%	11%

Offline

18%



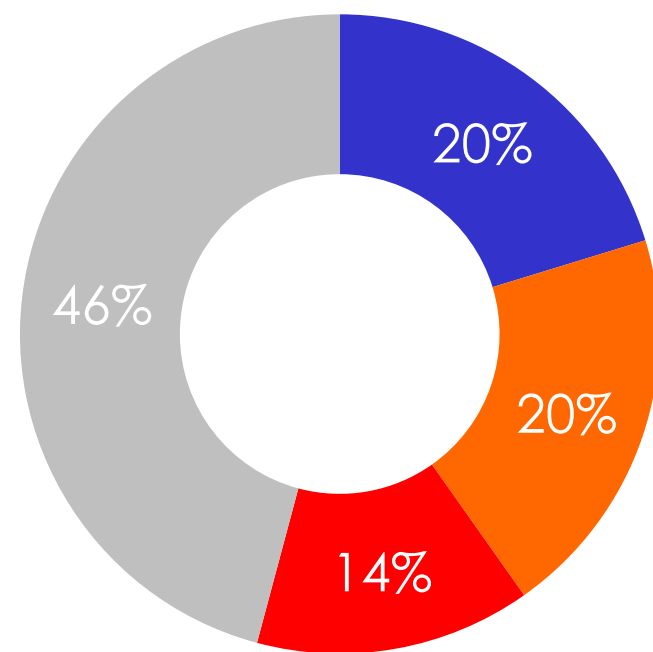
LFRs	Brand Stores	Others
39%	43%	18%

**Online marketplaces like Amazon and Flipkart are primary market places for premium smartphone sales.**

The D2C story is shaping up for this segment with users interacting with and buying from brand exclusive stores in the digital as well as physical space. The overall experience of the exclusive 'flagship' stores has been a key priority for the premium brands.

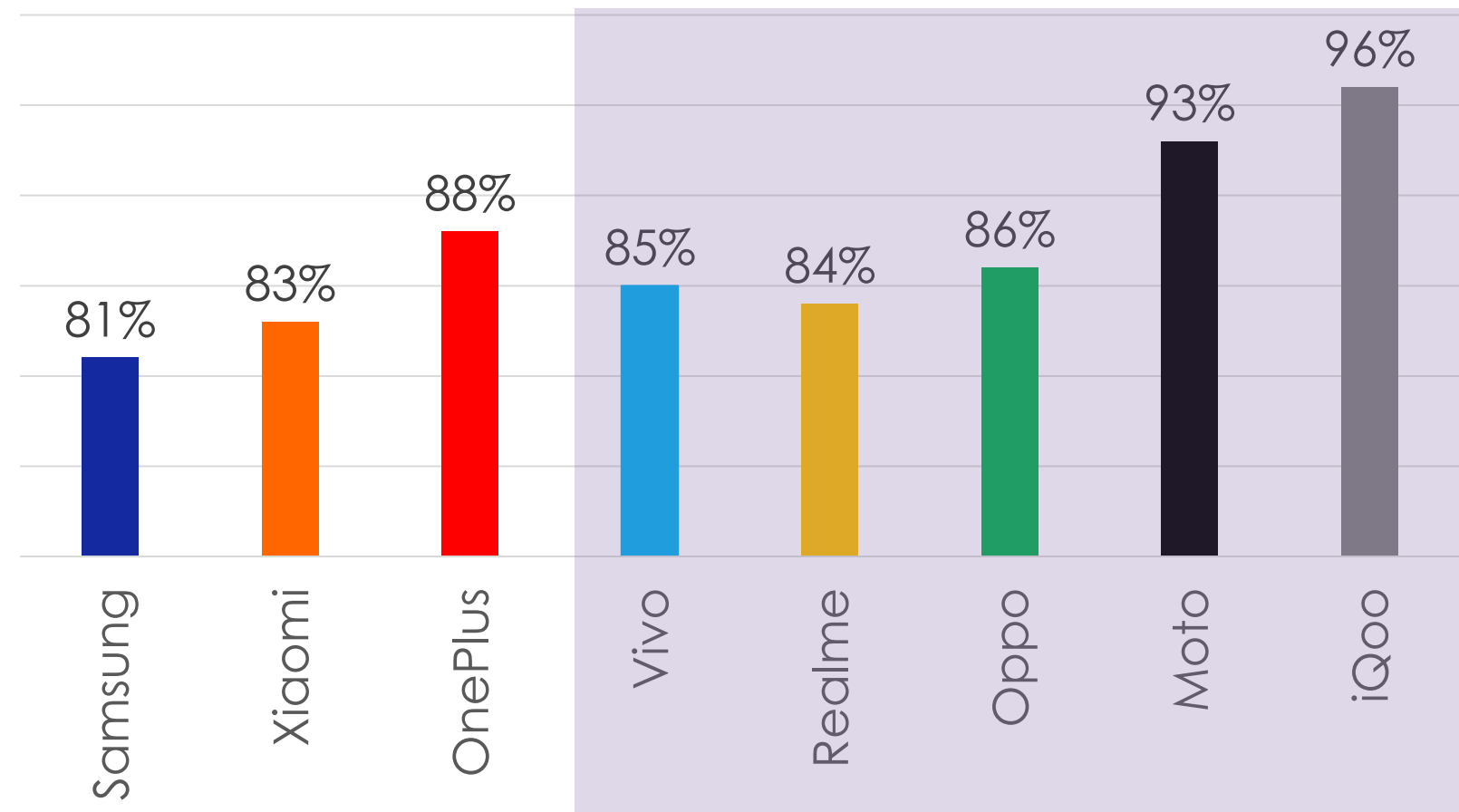
# Users do not always stay happy with their smartphones. They keep on looking for the best

Premium Brands Users Frequency Change



■ Samsung ■ Xiaomi ■ OnePlus ■ Others

Brand Contentment Rate (Premium)



Factor	Rank
Overall Performance	1
Technical issue	2
Overpriced	3
Camera	4
Others	5

**A premium smartphone is expected to offer a holistic performance.** Among the key premium brands, OnePlus has the lowest discontentment rate. Dissatisfaction with the overall performance tops the reasons why users are unhappy with the premium smartphones they use.

## Premium users are appreciating the annual refresh of flagships by leading brands

	OnePlus	Samsung	Xiaomi
Users changing their smartphone with the new model	57%	44%	37%

Users across premium brands want to keep pace with the latest technology. For this they upgrade to the latest model launched.

Among the leading brands, most OnePlus users upgrade to the latest smartphone model launched.

**Other than the brand, the smartphone should also look premium and add to the personality.**

	OnePlus	Xiaomi	Samsung
Premium phone in looks	28%	21%	18%

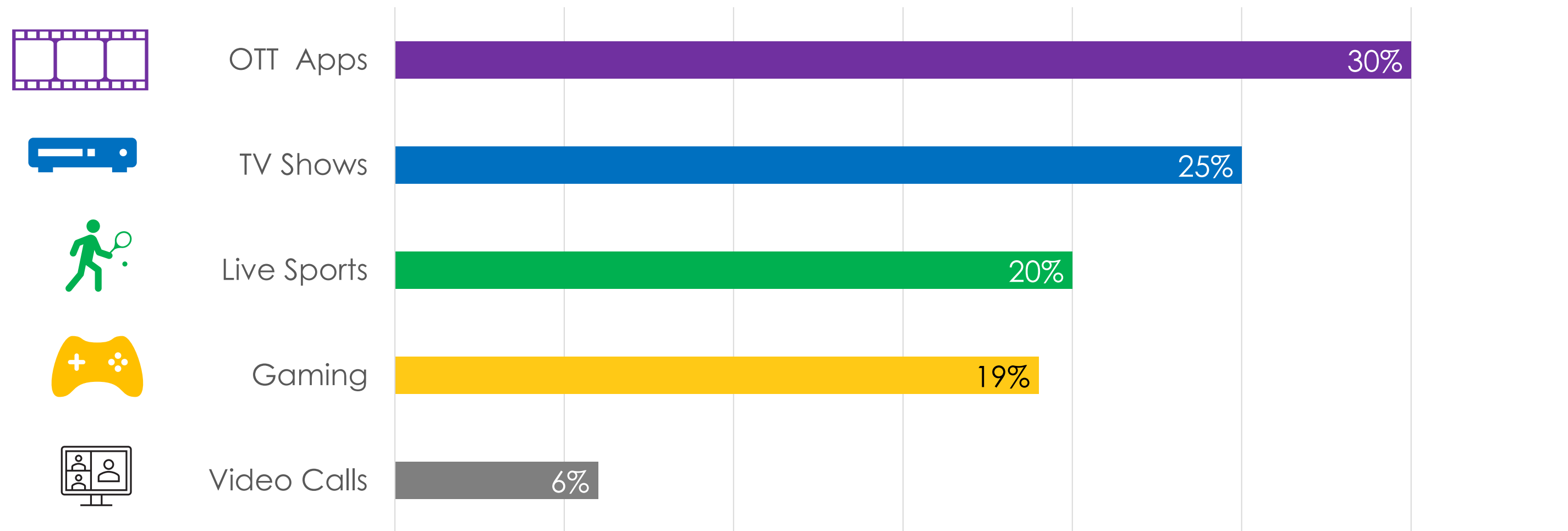
While brand matters the most in reasons while users decide on a smartphone in the premium segment, the appearance of the phone also has a bearing.

Among the top 3 brands, maximum OnePlus users (28%) find it premium in looks adding to their personality.



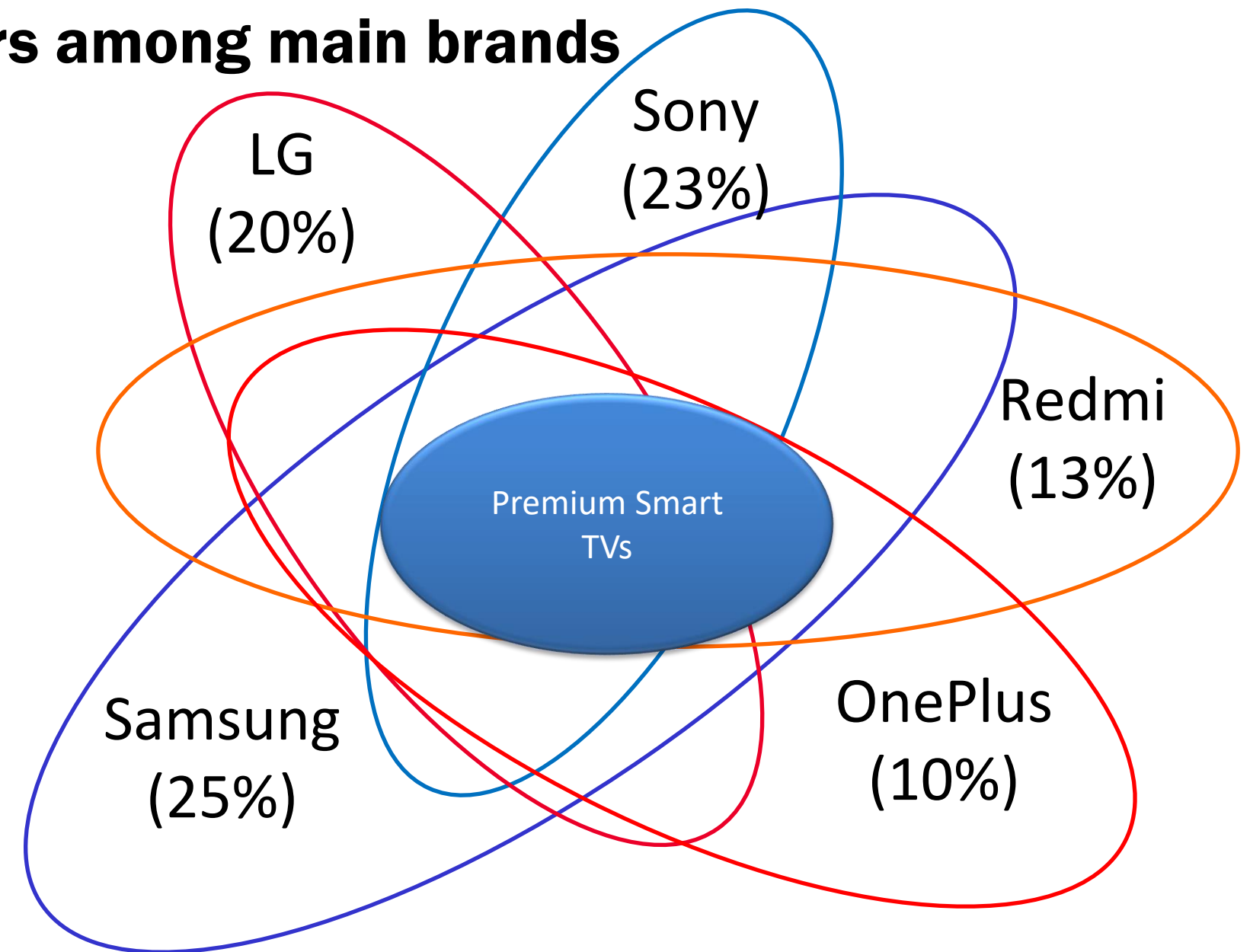
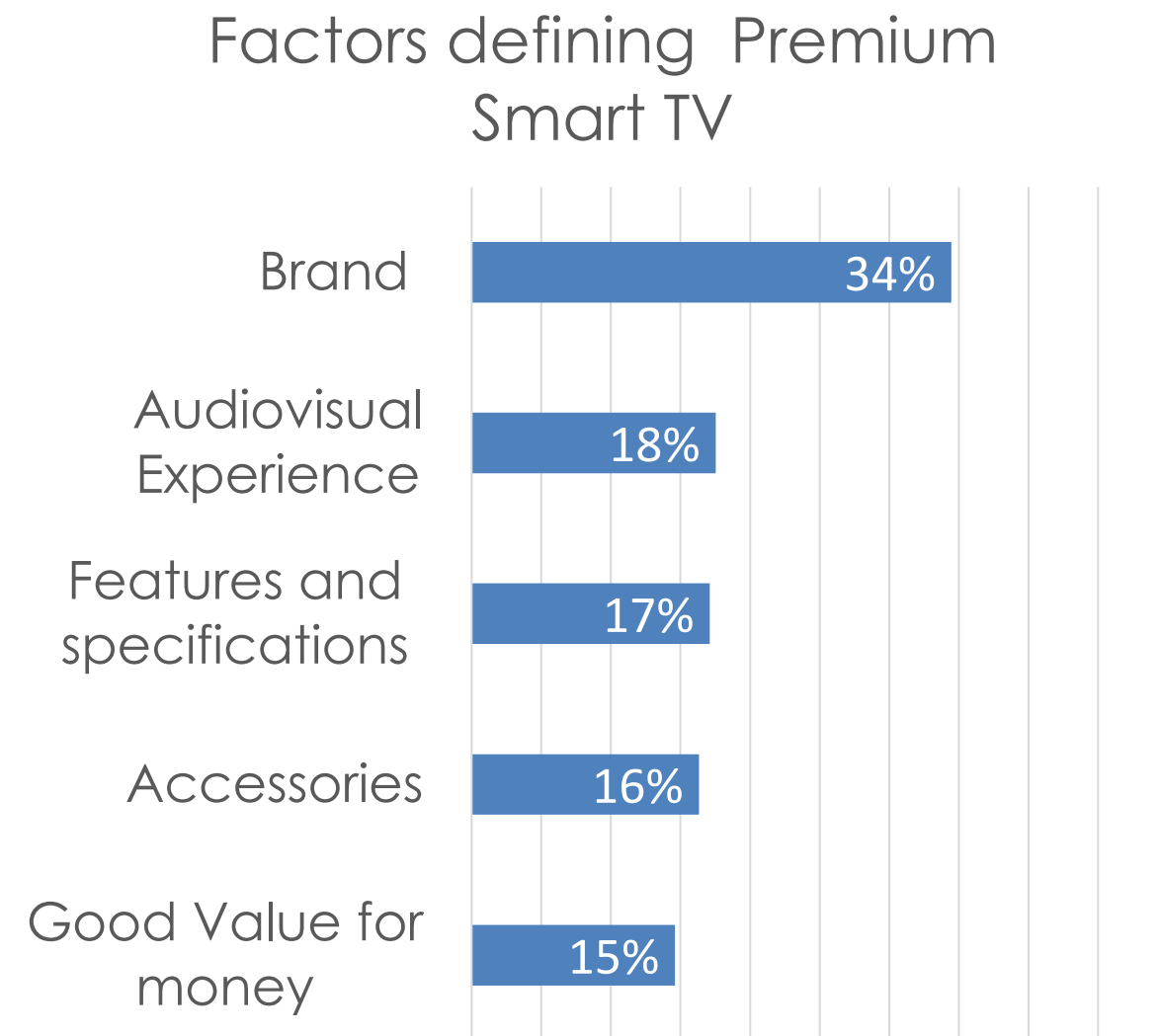
Smart TV

## Standalone content watching still leads the Smart TV consumption in premium segment. Interactive content is gaining foot



**Smart TV is still seen as a unidirectional content consumption screen.** The endeavour of making Smart TV as an OTT first screen is paying off as the premium users primarily use it for watching content over these platforms. The interactive content like gaming and video calling has set foot that will drive further innovation in the gadget. There will be soon need for an interactive smart TV in the premium segment.

## More than half of the premium Smart TV universe is still with the incumbents, Redmi and OnePlus only two smart ecosystem players among main brands

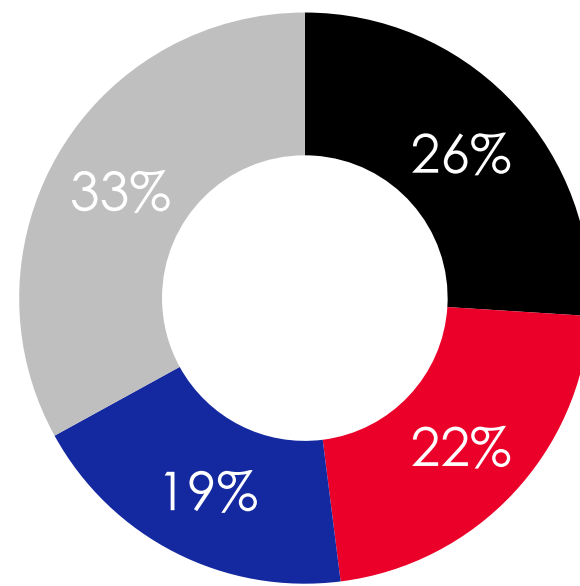


**The incumbents are still holding the smart TV segment firmly.** Among the smart ecosystem brands, OnePlus is the only real premium ecosystem brand. Redmi does figure, however, its positioning is not of a strong premium experience brand.



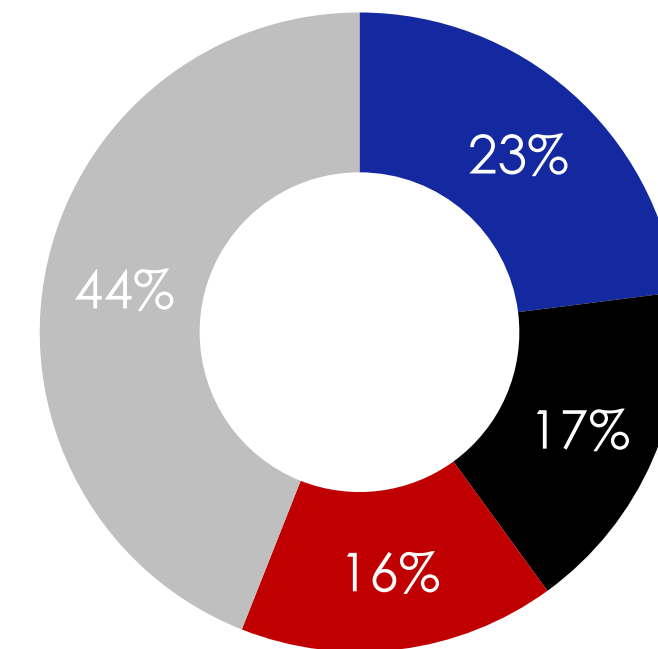
# Incumbents are still the aspirational brands. Among smart tech brands, OnePlus is gaining its market standing in the Smart TV category.

Aspirational Premium Smart TV Brands



■ Sony ■ OnePlus ■ Samsung ■ Others

Premium Brands with Longer Model Shelf Life\*

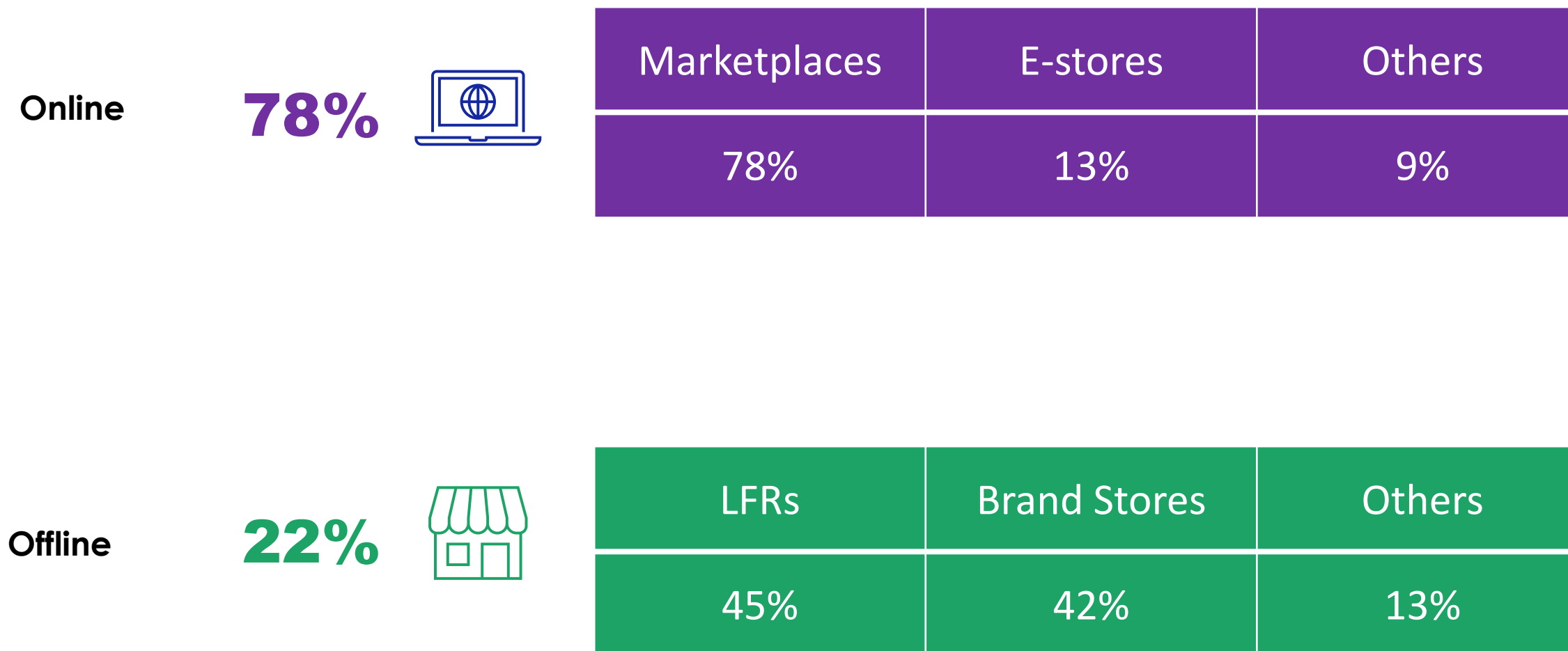


■ Samsung ■ Sony ■ LG ■ Others

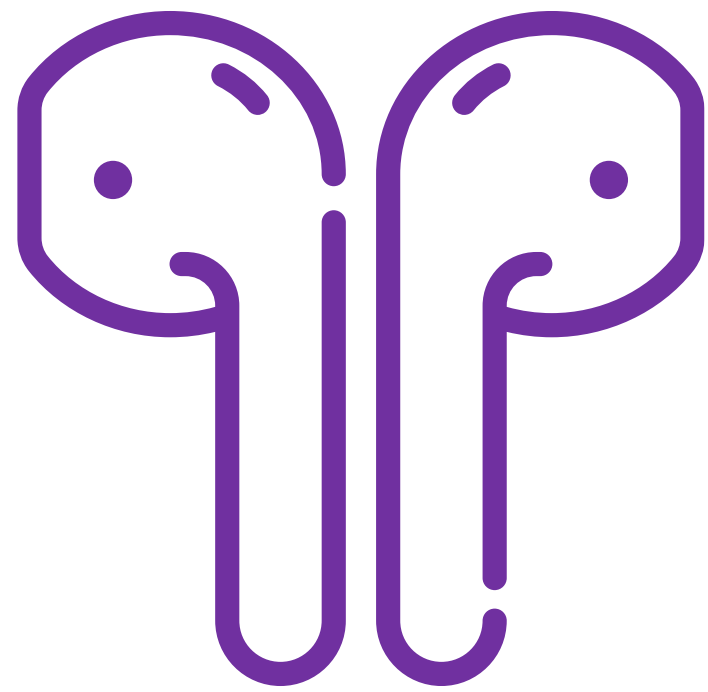
**Smart ecosystem brands foraying into the TV space fighting tough with the legacy TV brands.** Premium consumers still have more confidence in the legacy TV brands and prefer going with them for smart TVs as well.

\* Defined as users having either not changed or less than 2 in the past 3 years.

## Online channel is emerging as a preferred medium to buy Smart TVs as the users buying them in premium space are evolved users

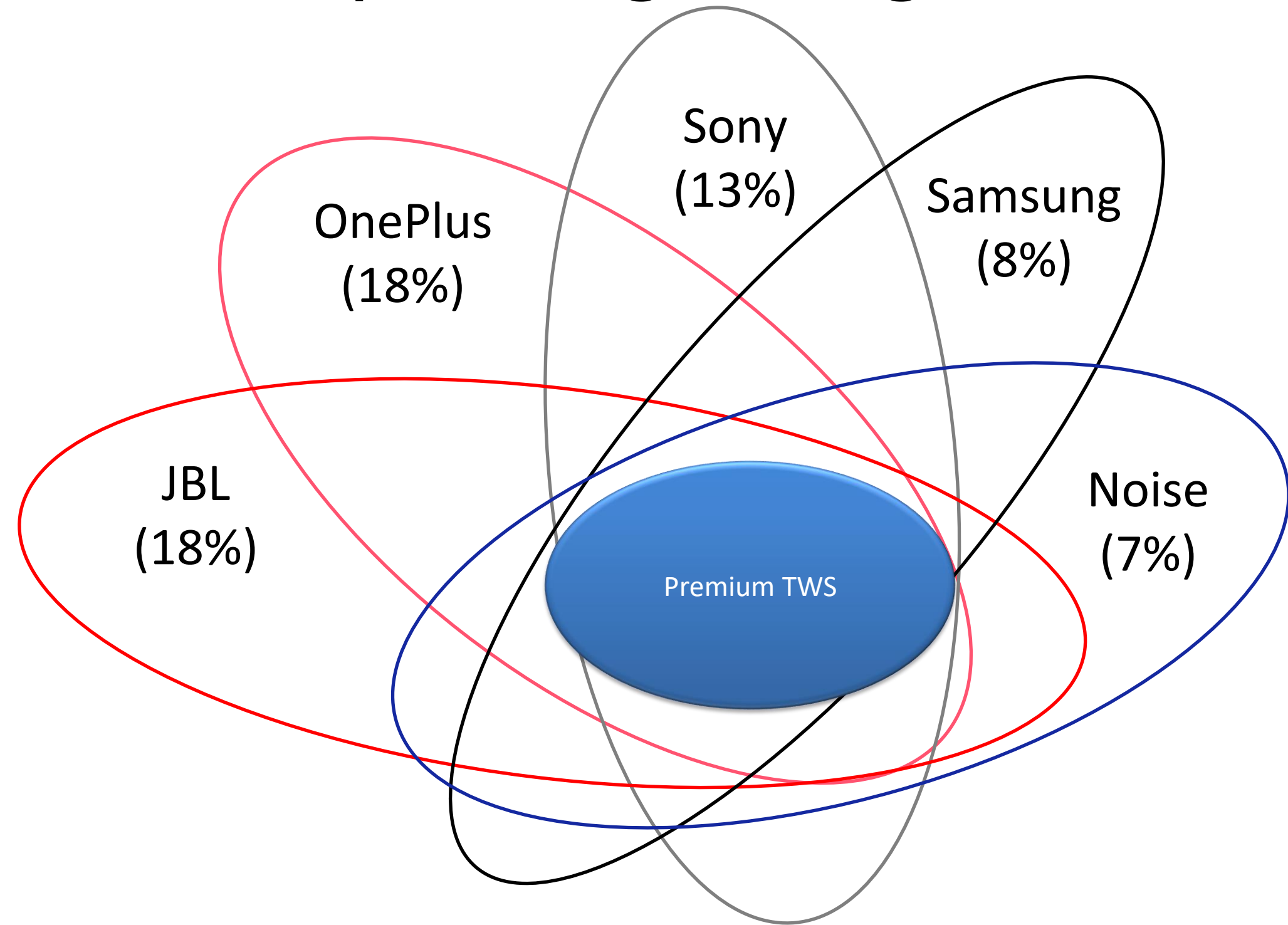
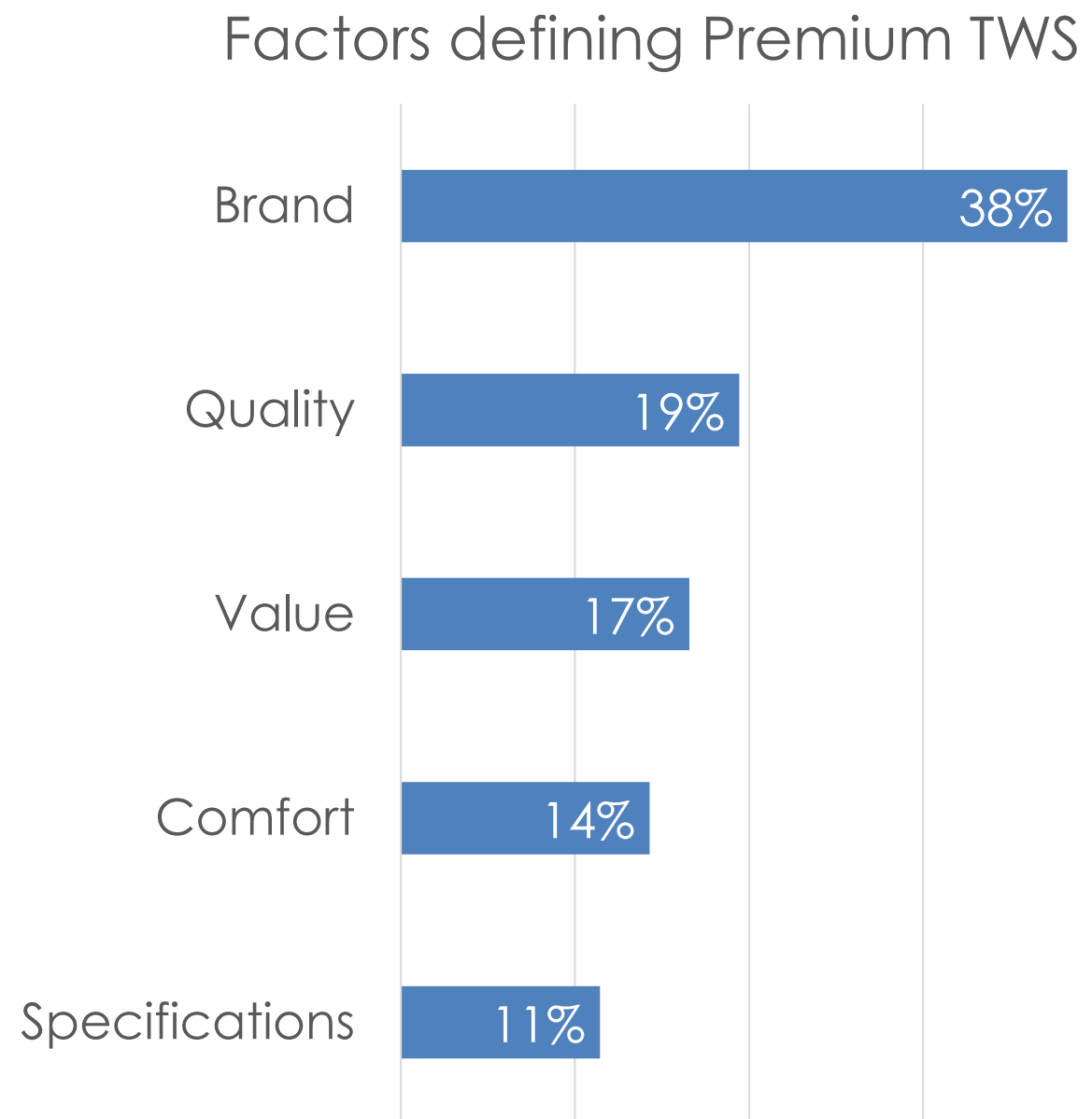


**Smart TVs are sold through all the channels though organised ones take a lead.** While potential buyers would definitely want to experience the smart TV first, they go for buying through convenient mediums like online which also gives them great offers and discounts.



TWS

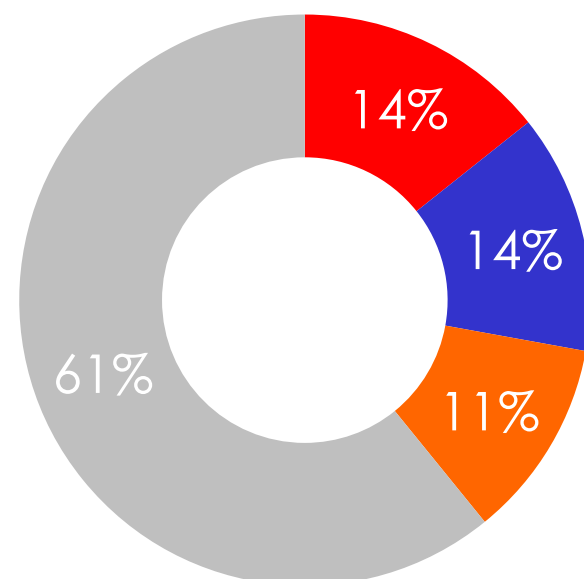
# The reliance on the brand selling TWS brands in the premium segment is high than the actual functions of the wearable



**Being an evolving space, the users are relying more on the brand than the functions to make their buy decision.** Audio is considered as a speciality function and users in the premium segment are going with the reputed brands having legacy in the audio technologies.

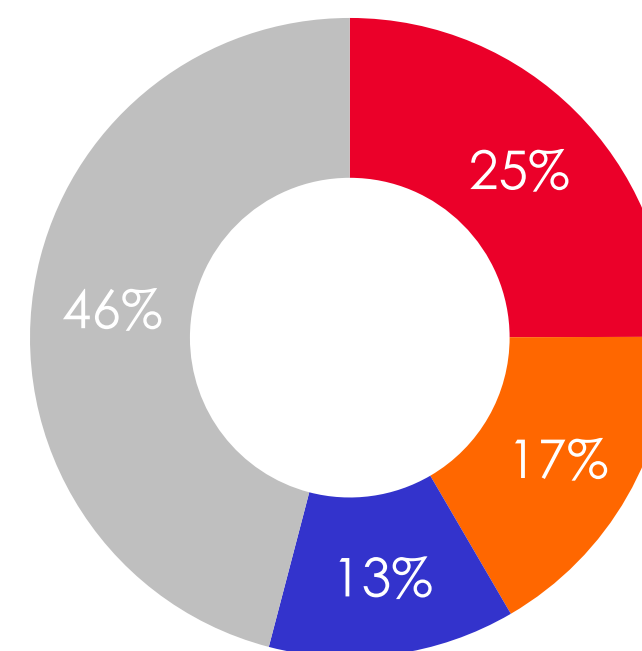
## Premium users are not ready for any compromise on audio experience and go for very credible brands

Aspirational Premium TWS



■ OnePlus ■ Samsung ■ JBL ■ Others

Premium Brands with Longer Model Shelf Life\*

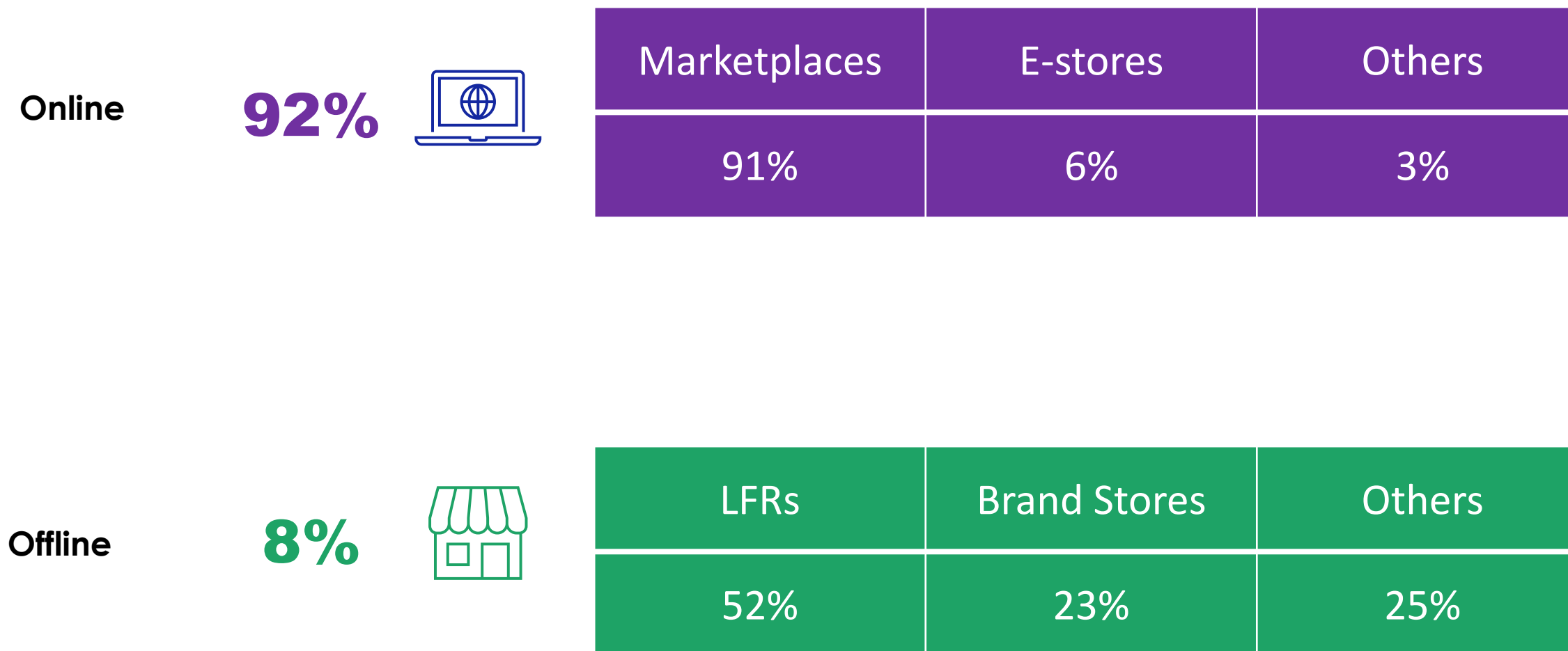


■ OnePlus ■ JBL ■ Samsung ■ Others

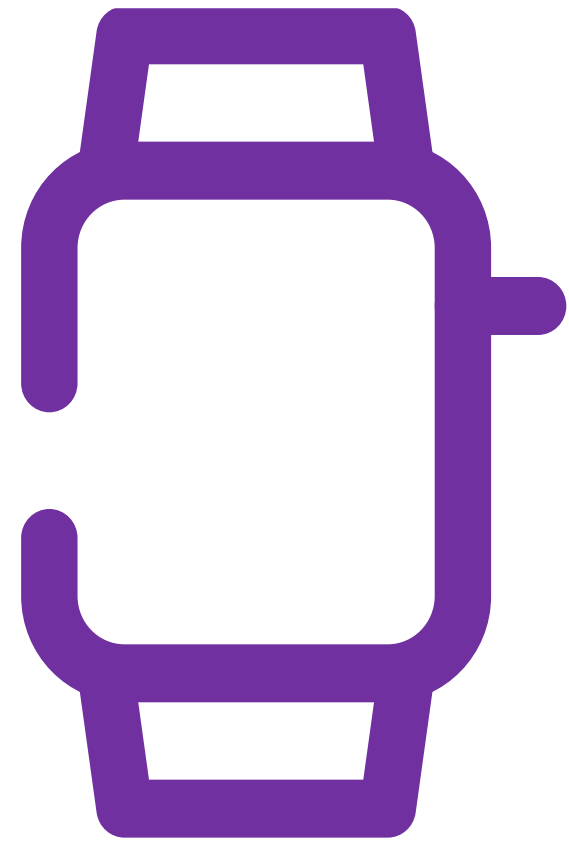
**Premium users aspire for premium brands in TWS.** There is an inclination to use premium brands of TWS only among the premium smart tech users. This also helps the users to rely on the brands to offer them functions and features as they explore the relatively new smart device category.

\* Defined as users having either not changed or less than 2 in the past 3 years.

## Being very portable, TWS Buds are among a favourite category to sell online

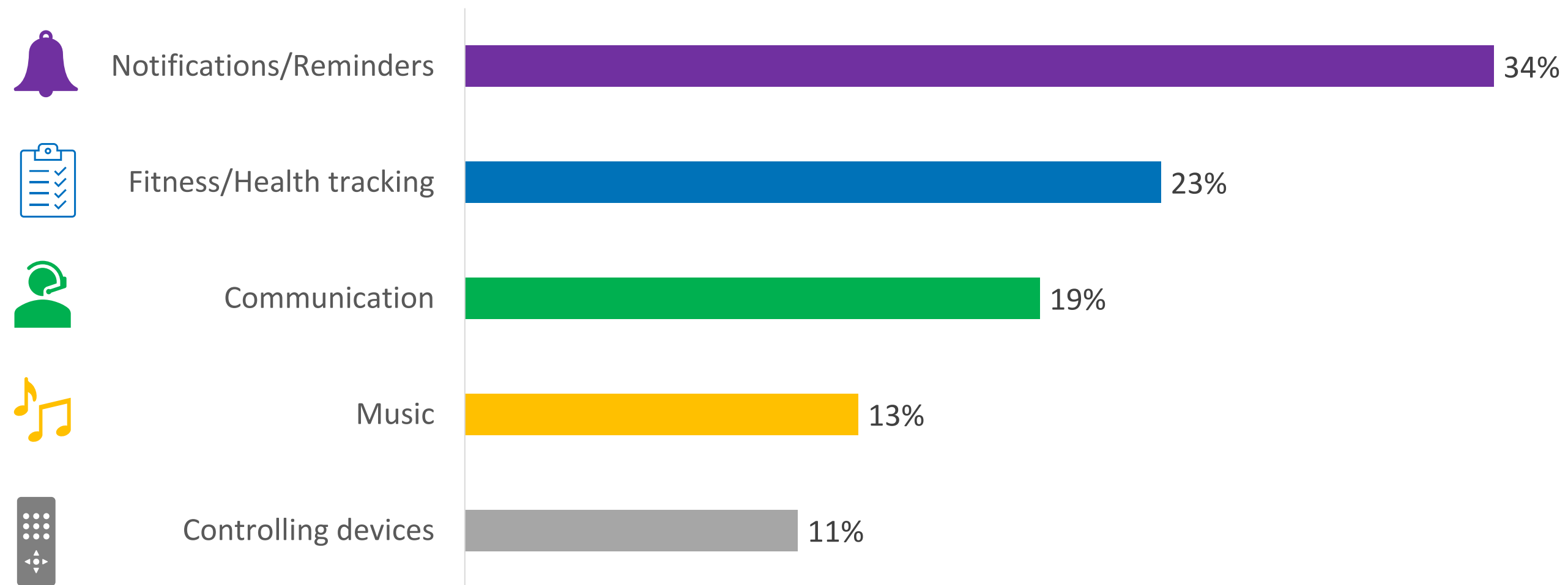


**TWS is among hot selling smart categories online.** TWS emerged as a promising category during the covid-19 emerging on the surface which made it among most selling smart device categories online. The device continues to sell as a standalone accessory where users buy it separately to add to their audio experience connecting different smart devices.



Smart Watch

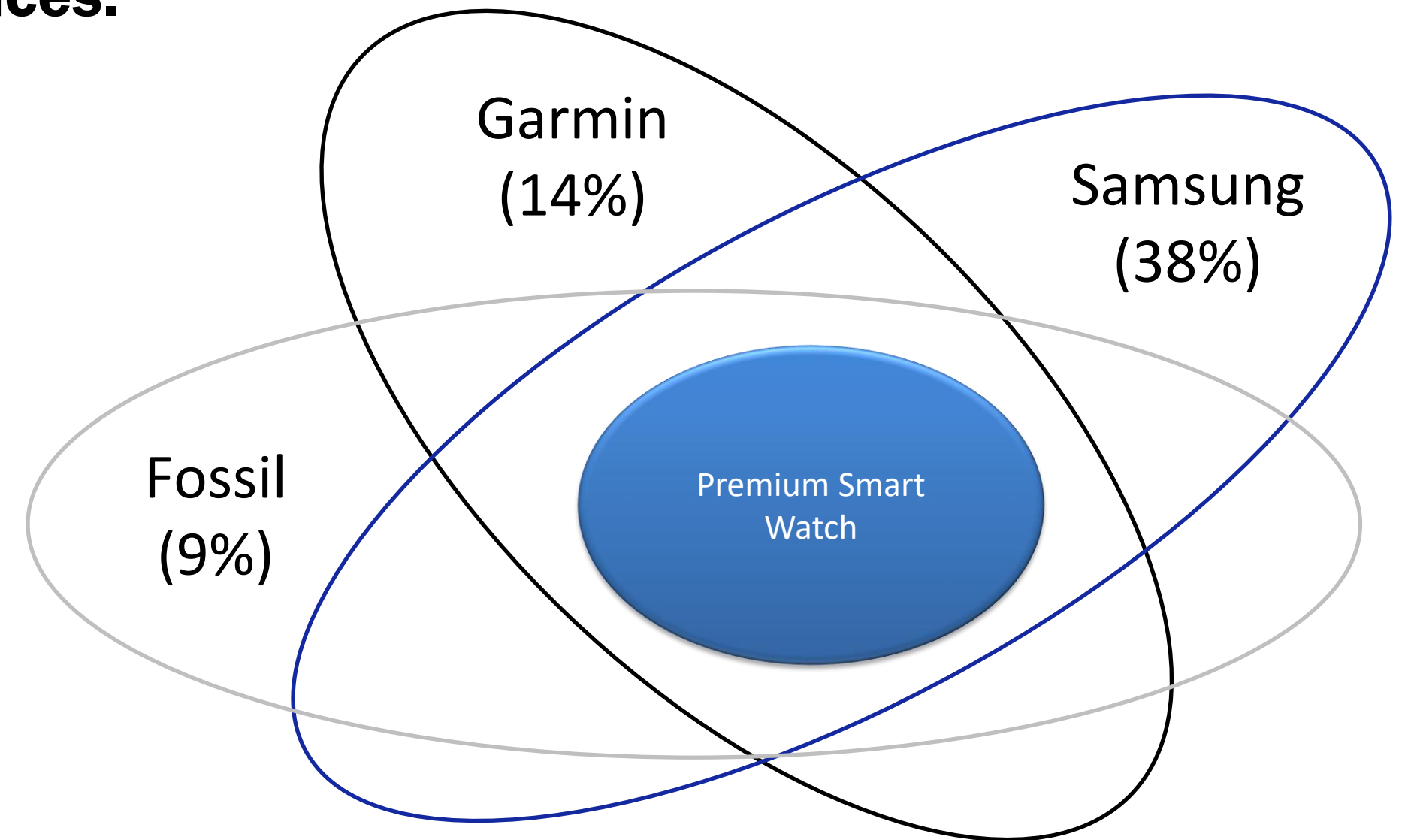
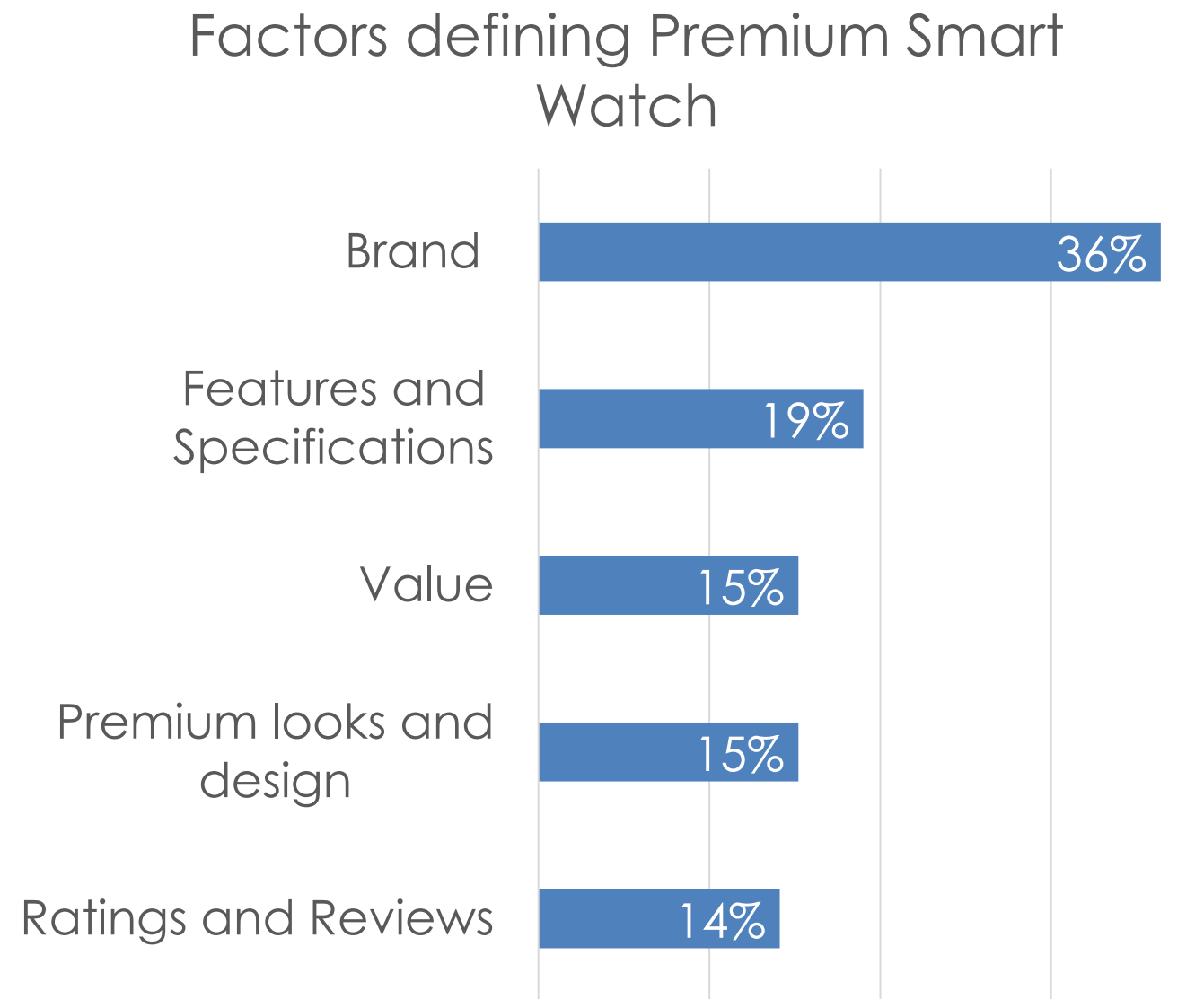
## The small smart screen on the wrist is primarily being used to stay updated with the latest on the apps through notifications



**The smart watch is becoming hub of notifications and reminders offloading smartphones.** The smart watch is being used by premium users for tracking notifications from social media and other apps. Its usage as a controlling device has started to begin.



**There is an opportunity for premium smart tech ecosystem brands like OnePlus to focus more in this category of smart devices.**



**Smart Watch complements the existing smart devices ecosystem of premium users.** Smart Watch is seen as an extension to the smartphone and users prefer using from the same brand as their smartphones.

## Showing similar trend, Smart Watch is also primarily bought online in the premium segment

Online

95%



Marketplaces	E-stores	Others
68%	25%	7%

Offline

5%



LFRs	Brand Stores	Others
30%	52%	18%

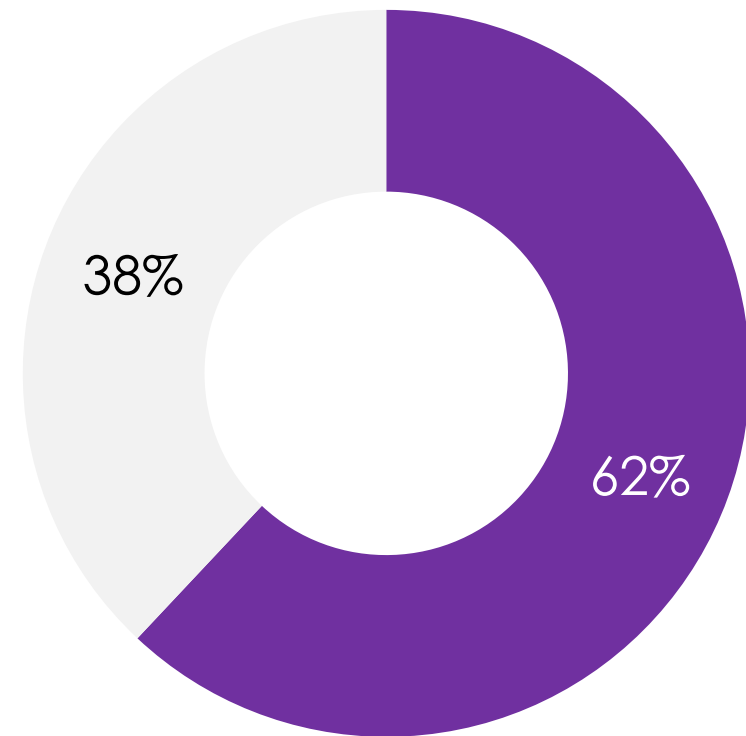
**The users know what they are buying and just go for it.** Smart Watch buyers exactly know what they are buying and should expect from this smart device. This makes online buying feasible for the smart watch category.



Seamless  
Connectivity

## 2 out of 3 premium smart tech users consider seamless connectivity very important to create an inclusive and immersive experience

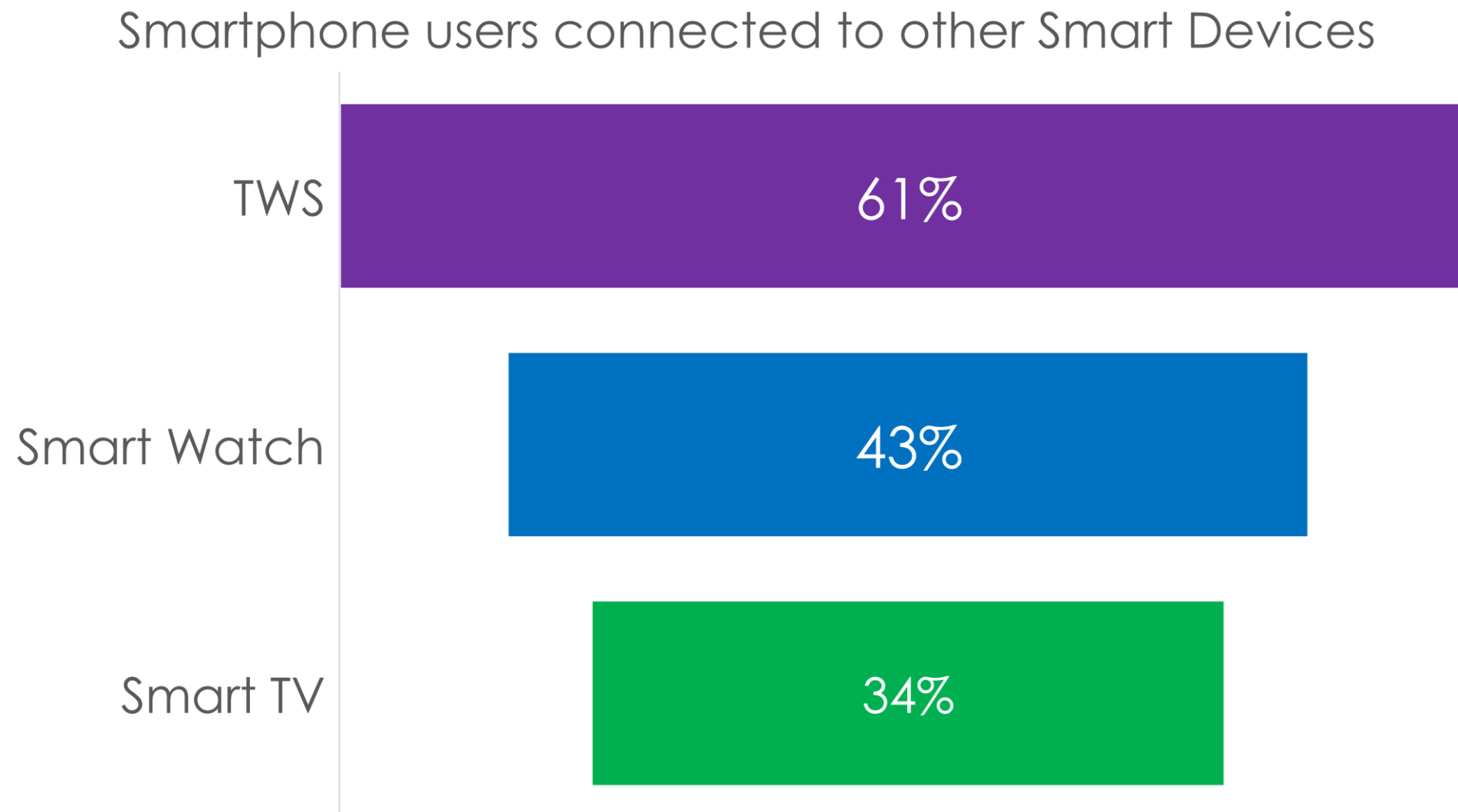
Importance of Seamless Connectivity



Smart tech users in the premium segment see it as an ecosystem for which seamlessly connecting with multiple devices is paramount.

\* Defined as users having either not changed or less than 2 in the past 3 years.

## Premium Smart Device users are increasingly connecting to other devices to create a seamless experience



**Smartphone being the primary smart device is connecting with other devices too.** The premium users are connecting to multiple devices to extend or enhance the functions.

## Premium smart tech users are connecting across smart devices they use

Satisfaction Rating		I	II	III	Others
89%	Smart TV	Play Station (36%)	Smart Watch (32)	TWS (27%)	5%
94%	Smart Watch	TWS (19%)	Smart TV (23%)	Home Appliances (56%)	2%
95%	TWS	Smartphone (54%)	Smart Watch (27%)	Smart TV (14%)	5%

**Seamless connectivity is extremely critical for premium smart device users. Brands having integrated it well allow their users to connect with other devices with ease.**

	OnePlus	Xiaomi	Samsung
Smart TV	52%	42%	45%
Smart Watch	48%	44%	41%
TWS Buds	40%	35%	29%
Controlling of other Devices (Smart Home)	40%	37%	33%

Premium users want to have an easy interconnectivity of smart devices to be able to leverage their omni-usage and same experience across.

OnePlus users lead in connecting to other devices from their smartphones. This is owing to its easy and hassle-free connectivity.

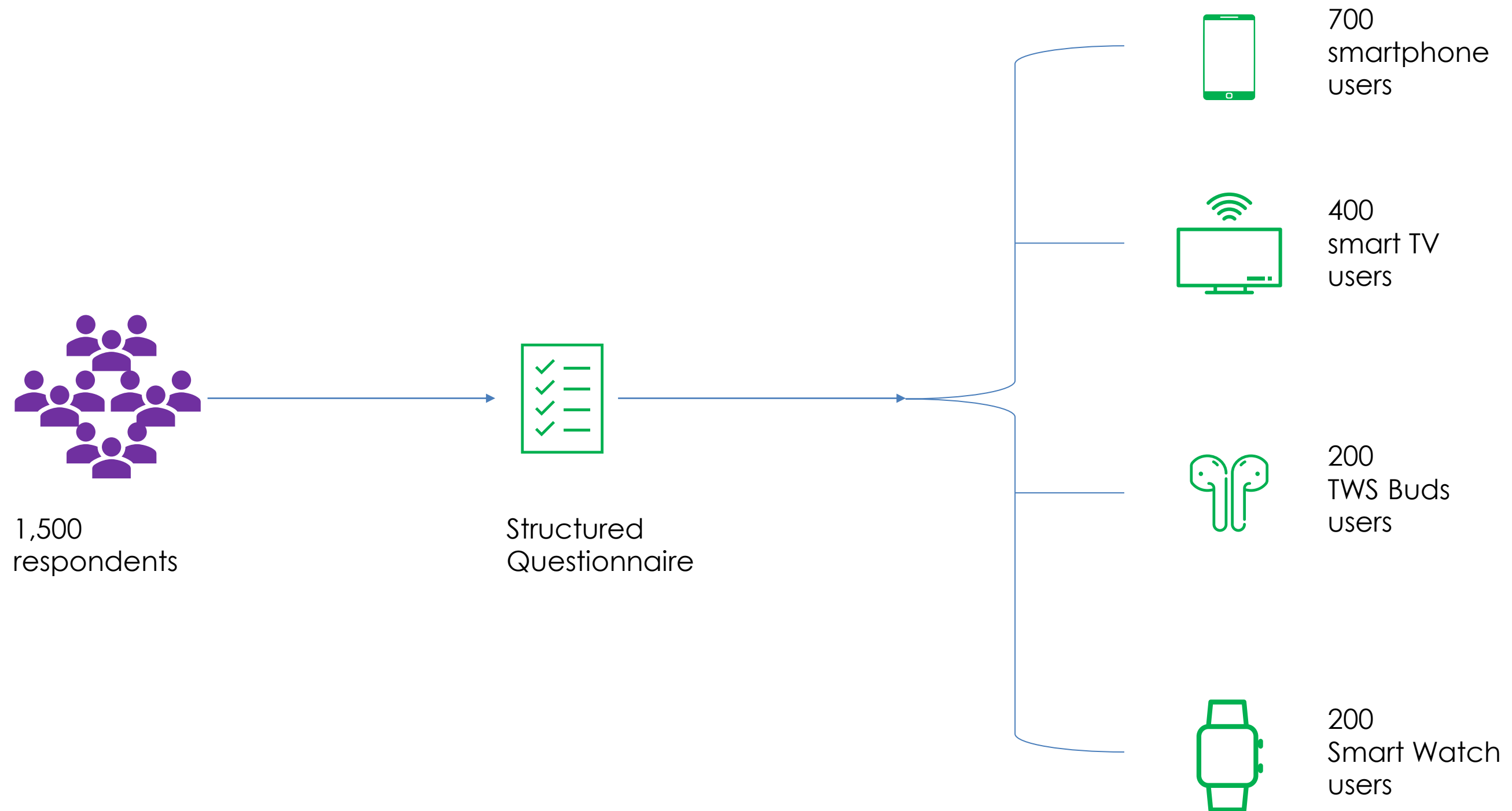


## Methodology & Respondents



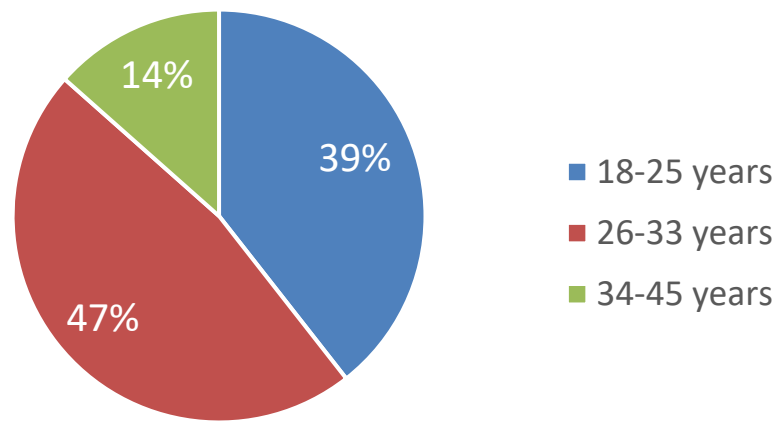
# Methodology

This study was conducted by Techarc to understand the premium technology users preferences and behaviour. The study covered about 1,500 respondents via online survey. The users were identified having an android smartphone of Rs 25,000 or more.

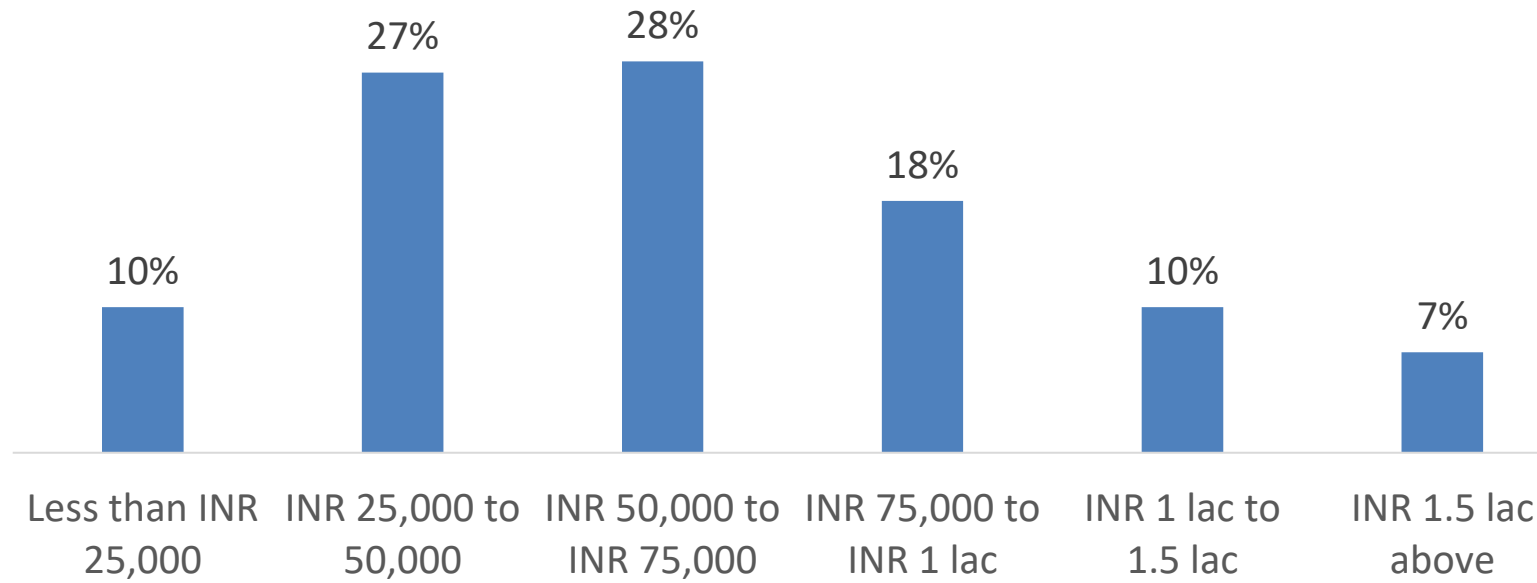


# Respondents' Profile

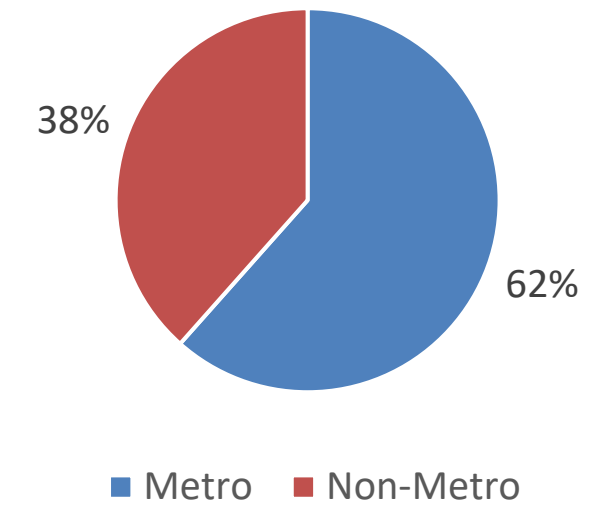
Age Group



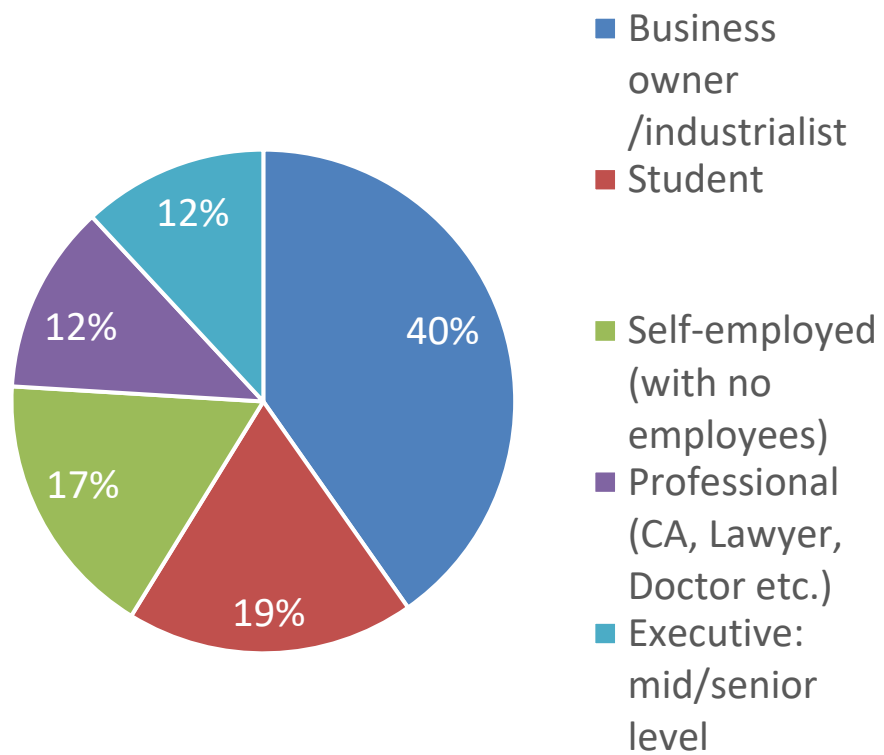
Income



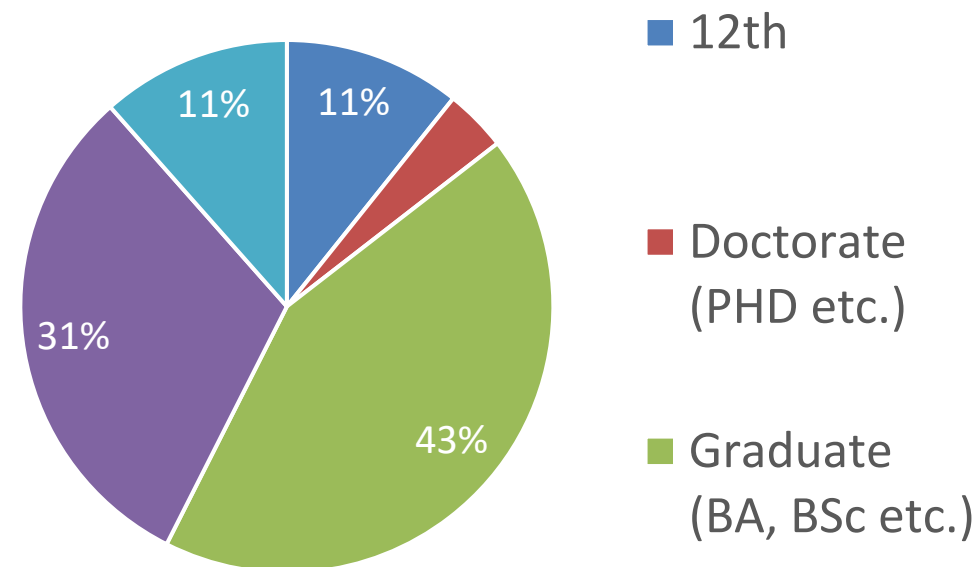
Location



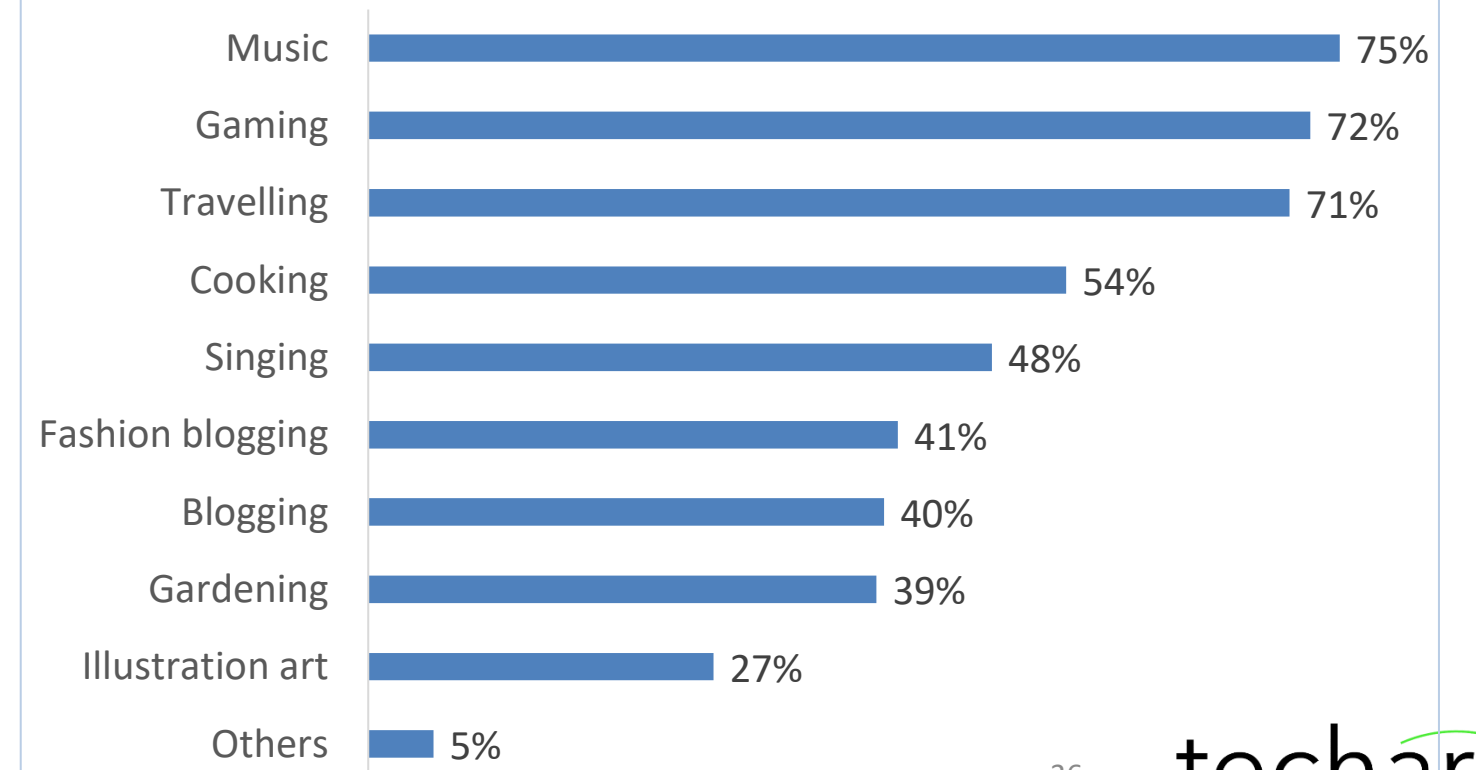
Occupation



Education



Hobbies





**Thank You!**

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