



# Rural India – Emerging from an era of Data Darkness

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#ETRURALSUMMIT

# Our India

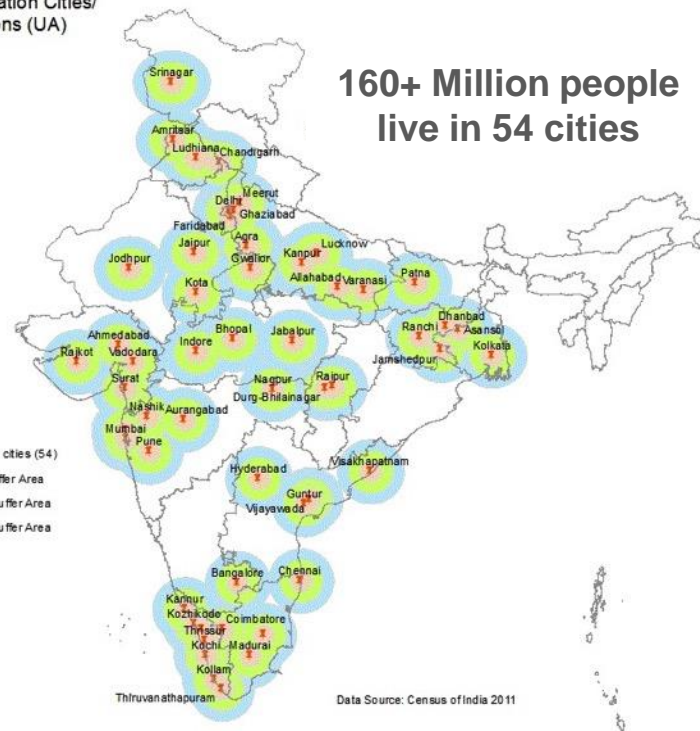
- 1.37 Billion people
- 8 Metros, 27 States, 600+ Districts, ~6,000 Talukas, 4,000+ Towns and 600,000+ Villages
- Overall population density of **416 people** per square km.
- Mumbai has a population density of **21,000 people** per square km.

India: > 1 million Population Cities/  
Urban Agglomerations (UA)

**160+ Million people  
live in 54 cities**

## Key

- India States
- India 1 Million population cities (54)
- 1 Million cities: 50Km Buffer Area
- 1 Million cities: 100Km Buffer Area
- 1 Million cities: 150Km Buffer Area



Maps Not to Scale. All Map Boundaries are for indicative purpose only.

# Urban India

Technology based evidence indicate that India's urban population may already well be in excess of **60%** - a truth less organic and more derived



India does not live in its villages anymore..

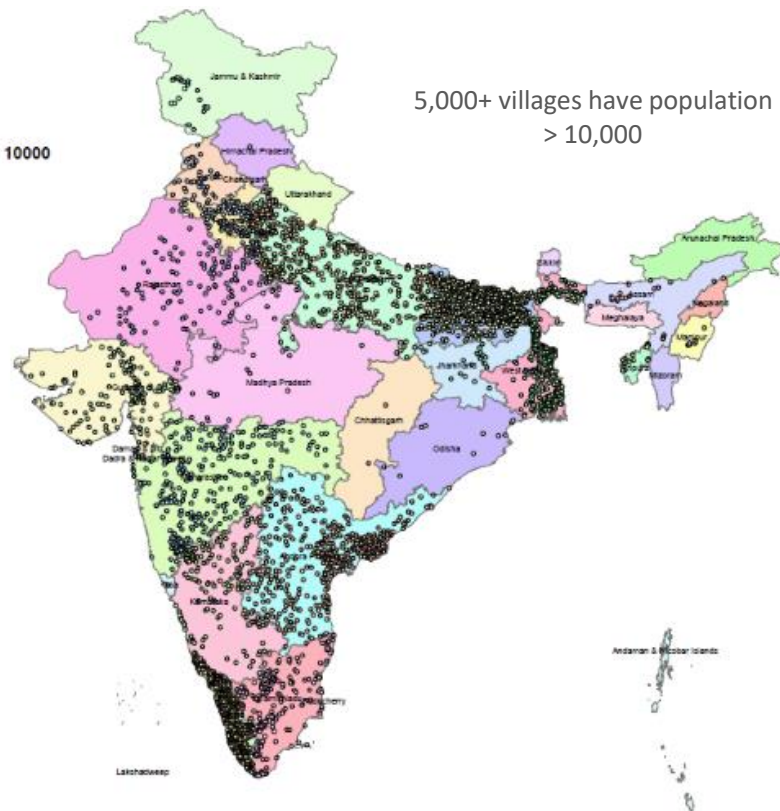
Name	Population
Mumbai	12,691,836
Delhi	10,927,986
Bengaluru	5,104,047
Kolkata	4,631,392
Chennai	4,328,063
Ahmedabad	3,719,710
Hyderabad	3,597,816
Pune	2,935,744
Surat	2,894,504
Kanpur	2,823,249
Jaipur	2,711,758
Navi Mumbai	2,600,000
Lucknow	2,472,011
Nagpur	2,228,018
Indore	1,837,041
Patna	1,599,920
Bhopal	1,599,914
Ludhiana	1,545,368
Tirunelveli	1,435,844
Agra	1,430,055

# vs Rural India



## Villages with Population > 10000 State/UT (Village count)

- Andhra Pradesh (482)
- Assam (21)
- Bihar (1,129)
- Chhattisgarh (2)
- Dadra Nagar & Haveli (1)
- Goa (1)
- Gujarat (186)
- Haryana (121)
- Himachal Pradesh (1)
- Jammu & Kashmir (23)
- Jharkhand (35)
- Karnataka (104)
- Kerala (797)
- Madhya Pradesh (31)
- Maharashtra (310)
- Manipur (7)
- NCT of Delhi (6)
- Nagaland (1)
- Odisha (10)
- Puducherry (3)
- Punjab (41)
- Rajasthan (120)
- Tamil Nadu (209)
- Tripura (18)
- Uttar Pradesh (545)
- Uttarakhand (15)
- West Bengal (418)



5,000+ villages have population  
> 10,000

map not to scale

Data courtesy: Census of India 2011

# The Great Rural Migration



Every **two seconds** an Indian from rural area moves to a city in search of a better life, which is a massive **43,200** movements **every day**.

In the next 13 years, World Bank estimates that 40% of Indians will be moving to urban areas, or **300+ million people** adding to the almost **160+ million** currently scattered in **54 cities** across India.

Farming does not provide employment for more than **4 months** in a year on average. Villagers are driven equally by milk merchants, traders, artisans, middlemen and money lenders. Men, women and children routinely migrate for **6 to 9 months to urban areas** in search of employment. Cities run on informal economy providing contractual and temporary work.

Source: economics times

<https://economictimes.indiatimes.com/jobs/migrant-workers-where-they-come-from-where-they-go/articleshow/67431247.cms?from=mdr>

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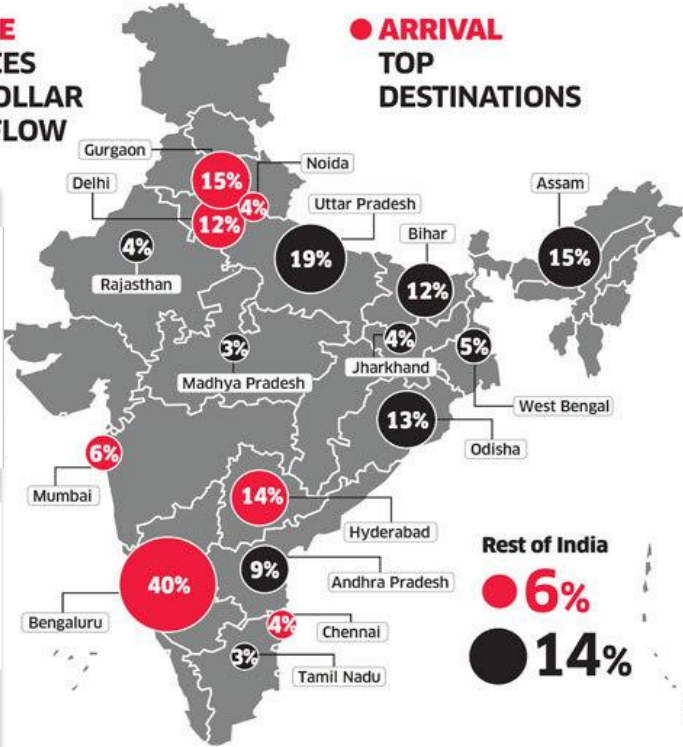


# The Great Rural Migration

● **DEPARTURE**  
TOP SOURCES  
OF BLUE-COLLAR  
MIGRANT FLOW



● **ARRIVAL**  
TOP  
DESTINATIONS



**WORK PROFILE: THE JOBS THEY GET**

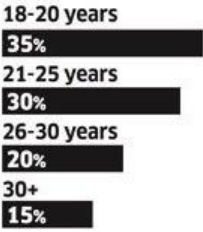


**GENDER PROFILE**



92% of the migrating workforce is male  
8% is female

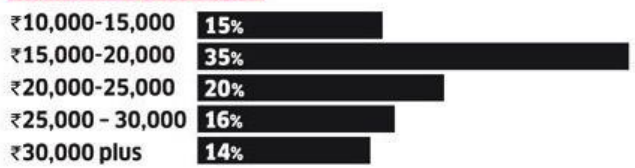
**AGE PROFILE**  
**MIGRANTS ARE**  
**TYPICALLY**  
**YOUNGER**



**SALARY TRENDS**

Due to the absence of a formal hiring system or a database that captures experience, the blue-collar workforce usually doesn't see any systematic rise in salary. About a third get ₹15,000-20,000 per month. They repatriate as much as 60% of their earnings home and are aspirational, looking to acquire two-wheelers, smartphones, financial products, health products and more.

**MONTHLY EARNINGS**



Source: BetterPlace blue collar jobs report \*Based on a sample set of 198,539 from amongst 2 million people employed in 532 cos.

# We have to Go **Rural** for the Existence of our Planet



India's urban moment is about crumbling infrastructure, choking systems, weak governance structures, and unplanned localities.

**Bangalore's** polluted lakes, frothing of foam, and its traffic gridlocks; **Mumbai's** annual monsoon chaos, crumbling overhead bridges and overcrowded local trains; and **Delhi's** air pollution and urban sprawls.

The way India sets-up its urban moment may as well determine the future of our existence and our planet.

# Rural Infrastructure Focus



Efforts have been made in the past to estimate the amount of investment that is required to provision rural infrastructure across **eight sectors** of **water supply, sewerage, solid waste management, storm water drains, urban roads, urban transport, traffic support infrastructure, and street lighting.**

The focus however is also required on relatively 'softer' infrastructure like **primary health, primary education, primary entertainment, and electricity distribution.**



# Rural is growing India's Internet Penetration

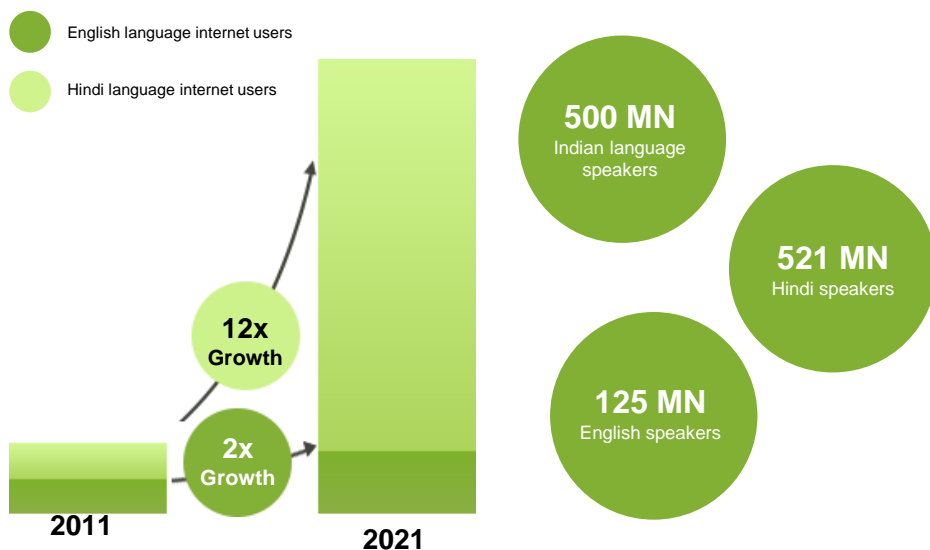
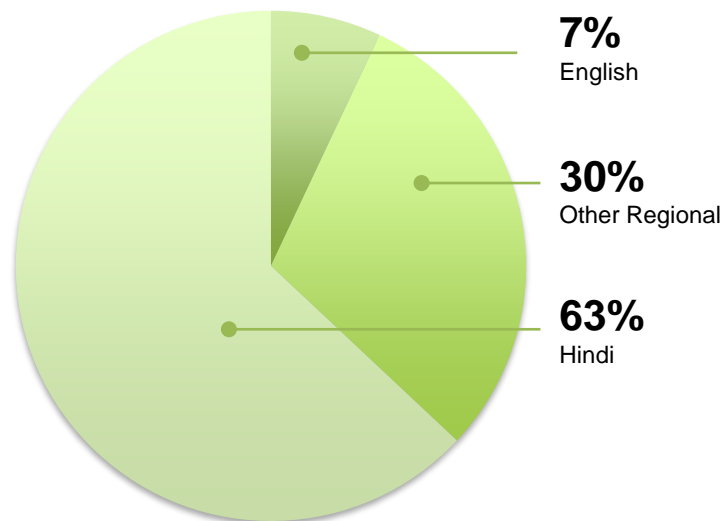


2G Feature Phones

JioPhones

Smart Phones

# Rural is Vernacular and it is exploding the internet



Over the next five years, it is expected that 9 out of every 10 new Internet users in India are likely to prefer vernacular or regional languages to access the internet.

# After Food & Connectivity security, **Rural** FMCG will grow

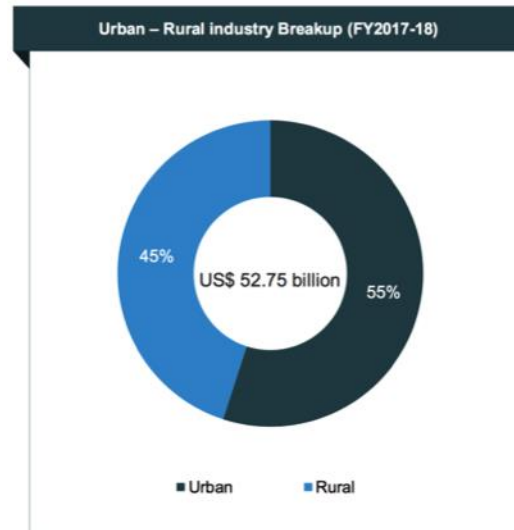
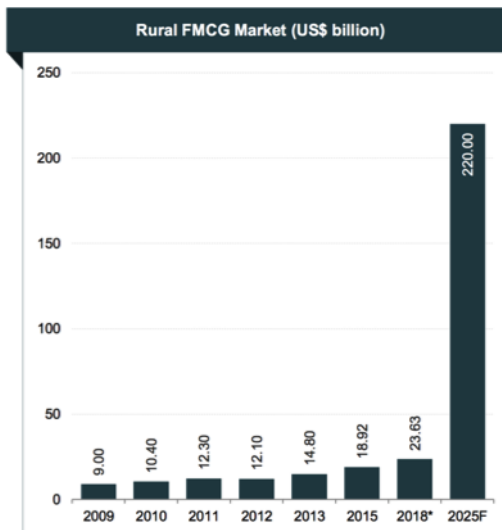
Rural is accounting for **45%** revenue share in the overall FMCG revenues. FMCG products account for 50 per cent of total rural spending.

Revenues from the rural segment are expected to grow 15-16% (**2x** of urban growth)

Demand for quality goods and services has been going up in rural areas, with improved distribution channels of FMCG companies.

As income levels are rising, there is also a clear uptrend in the share of **non-food** expenditure in rural India.

The Fast Moving Consumer Goods (FMCG) sector in rural and semi-urban India is estimated to cross **US\$ 220 billion** by 2025 from ~ US\$ 24 billion (2018).



# National Data Platform - Disha



**#DISHAPORTAL**

“ The **DISHA Dashboard** will be interactive and multi-dimensional, providing multiple views of performance of schemes, with geography drillable down to gram panchayat level and comparisons across various time dimensions enabled just by the click of a button. ”

**-Ram Kripal Yadav**  
Minister of State  
for Rural Development  
Government of India

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**42**  
National Flagship  
Schemes

**20**  
Ministries covered

**50**  
Screens Available

**3.5 B**  
Dynamic Data Points

Launched by Ministry of Rural Development and National Informatics Centre



# Rural Dividends

- Low penetration levels in rural market offers room for growth. **Huge untapped market.**
- Disposable income in rural India has increased due to the **Food security bill** and **Direct cash transfer scheme**.
- Rural consumption has also increased, led by a combination of **increasing incomes and higher aspiration levels**, there is an increased demand for branded products in rural India.
- FMCG companies **Dabur**, Unilever, Marico, P&G, ITC etc, have massive rural investment plans. **PayTM** recently did a fund raise of US\$ 1 B+ primarily on account of growing its rural base.
- **Jio** investments in connectivity infrastructure converting India from 2G to a **4G country** will have an unprecedented positive impact on our 600,000+ villages and sub-urban geographies.



# & Data + Purpose Marketing will make **Rural** Possible!



Jio is proud to enable admirable **Company with Purpose – Unilever** to make a difference at grass root level.

A simple first principle idea that came from a brain storm between Unilever and Jio team of doing two consumer journeys (1) communication starting from **Wheel** pack, (2) communication starting from Jio media vehicles

+ commitment to make a difference in rural women's life culminated into a 6 months program.

**Wheel Ghar Se Career** will educate millions of women in rural, tier 2 and 3 regions and make a permanent positive impact in rural household incomes and rural women independence.

“

The narrative that India lives in its **Villages** is changing fast.

- And it has serious implications for developing a vibrant India through architecture on cities and urban living alone.

The narrative of crumbling systems and inadequate **Urban** infrastructure across our **54 Urban Cities** is also changing fast (towards worst).

- The massive urban migration can either be an intractable problem or an opportunity to transform India.

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# Thank You

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