Tiles Research

1. Consumer Research Report
2. MBO & EBO Research Report

VARMORA
TILES • BATHWARE

Arvind K. Singhal
Managing Director
technopak

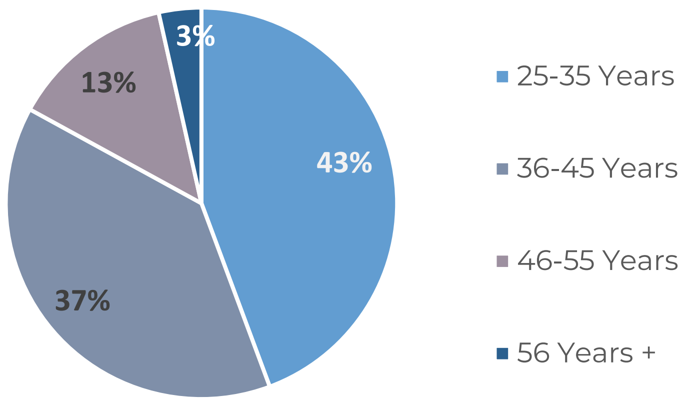
1. Consumer Research Report

Section I: Demographics

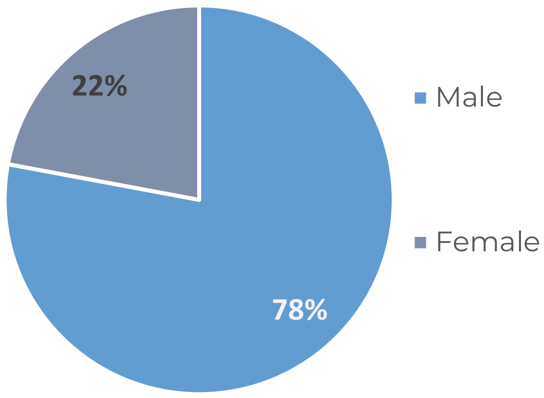
Demographic Profile of Tiles Consumers Surveyed (1/2)

N=766

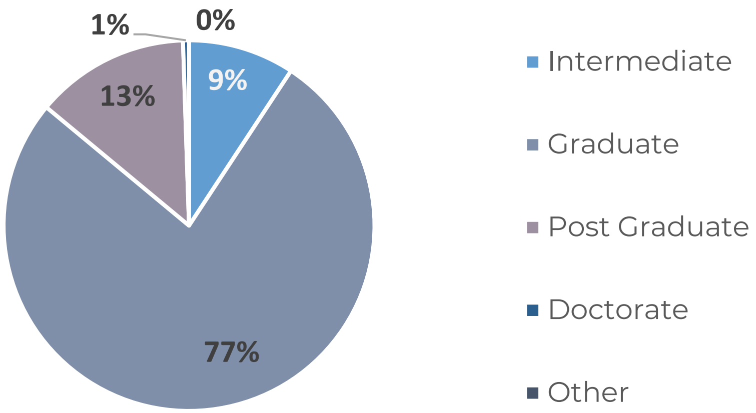
Age Split



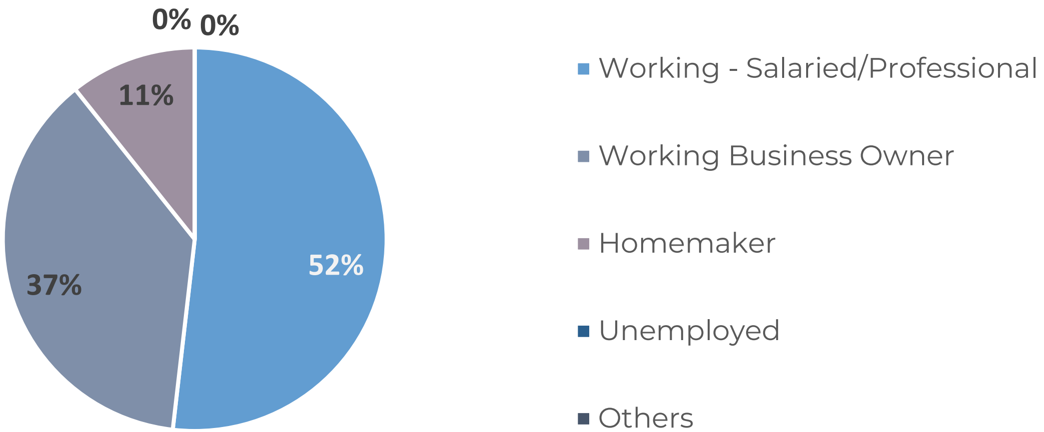
Gender Split



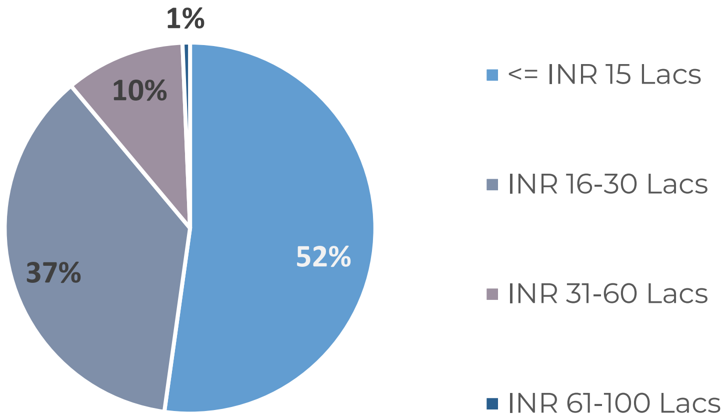
Educational Qualification



Occupation Split



Annual Household Income Segment

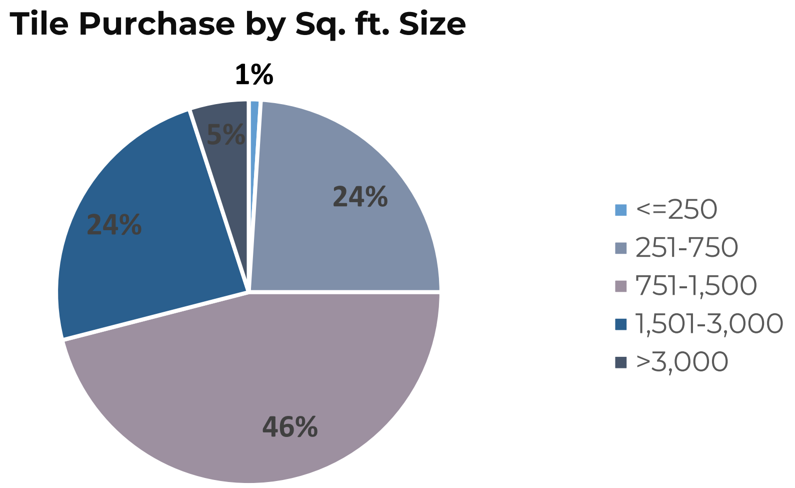


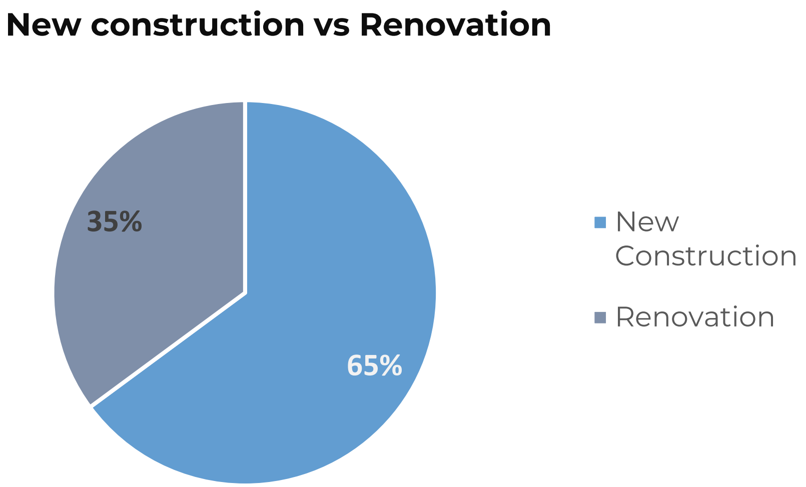
*Total Number of respondents-766,

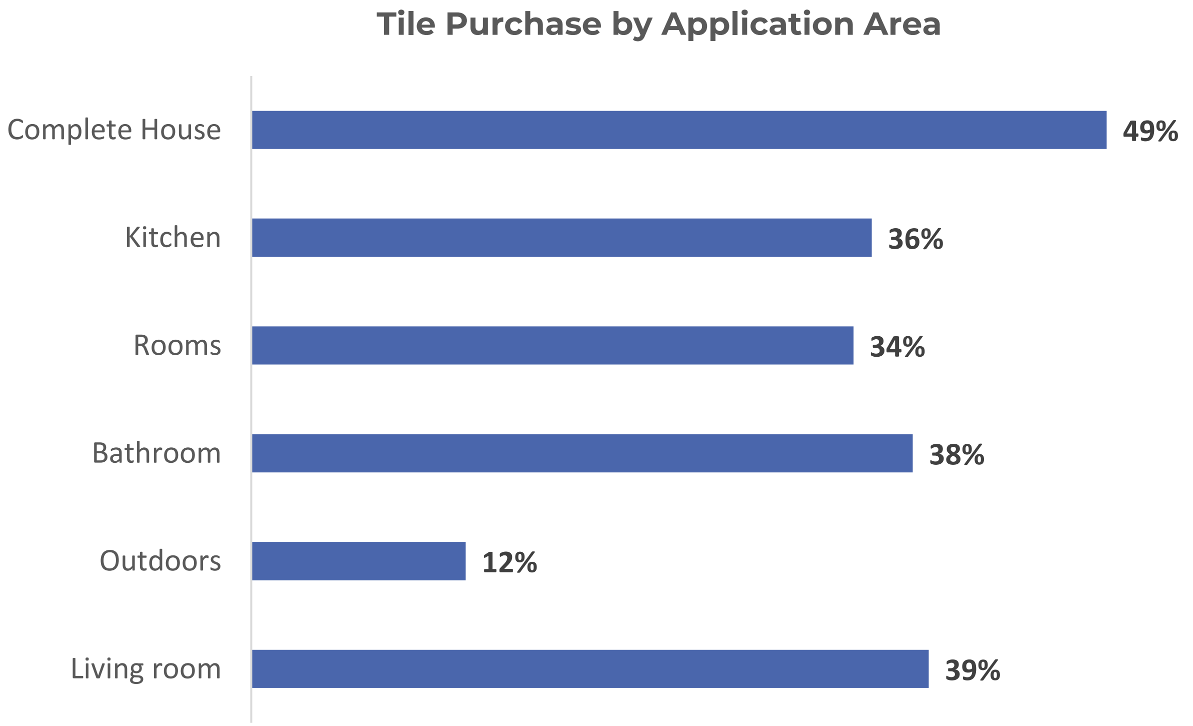
(Section 6- Demographics)

Demographic Profile of Tiles Consumers Surveyed (2/2)

N=766







*Total Number of respondents-766, Complete house consumers are exclusive. Other areas have consumer overlap

(Section 6- Demographics-Which area of house you purchased tiles for?)

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Managing Director
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Brand Coding

Brand	Code
Varmora	Varmora
Kajaria	Brand 1
Somany	Brand 2
CERA	Brand 3
Johnson	Brand 4
Simpolo	Brand 5
Orientbell	Brand 6
AGL	Brand 7
RAK	Brand 8
NITCO	Brand 9
HSIL	Brand 10

Arvind K. Singhal
Managing Director

Section II: Brand Awareness and Source of Awareness

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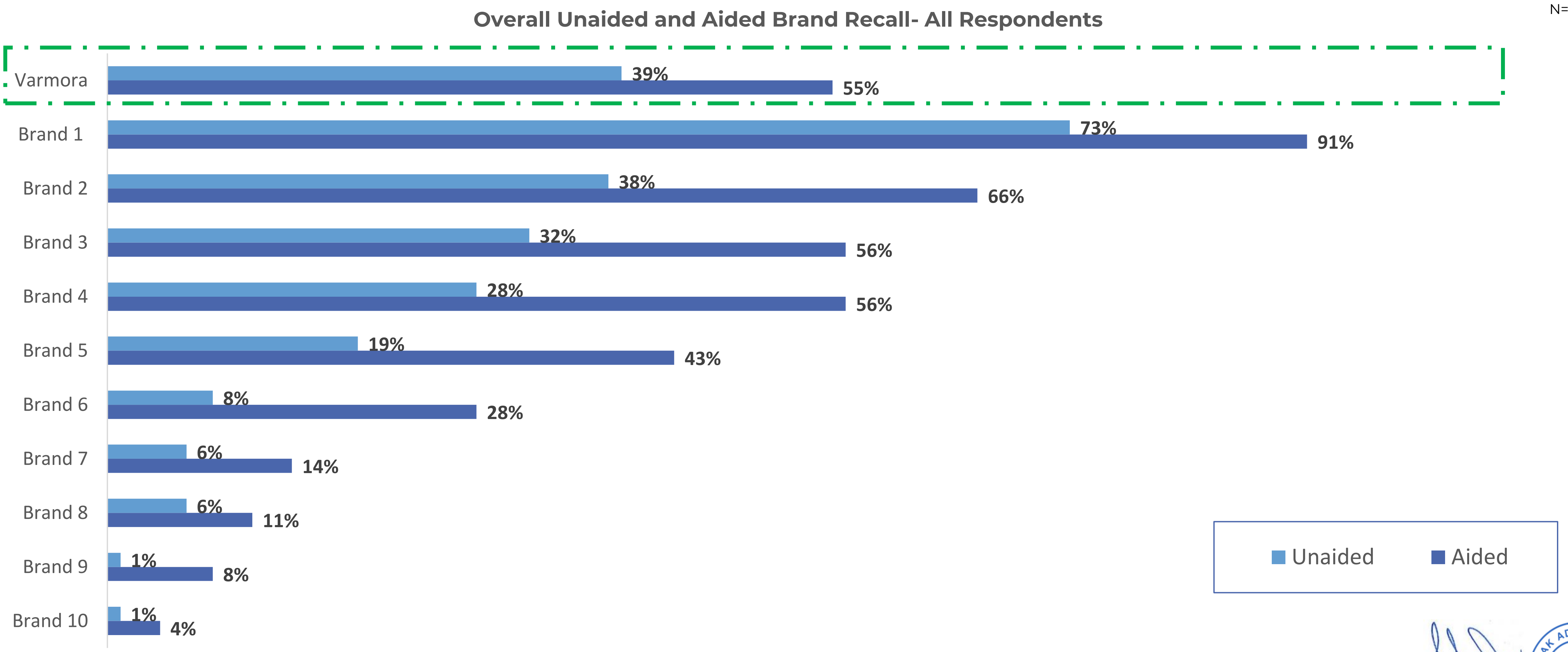
Managing Director

Varmora had the 2nd highest unaided recall and the 5th highest aided recall among 11 brands surveyed Pan-India

N=766



(Section 2 –Brand Awareness, Source of Awareness- Unaided Brand Recall)

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Managing Director

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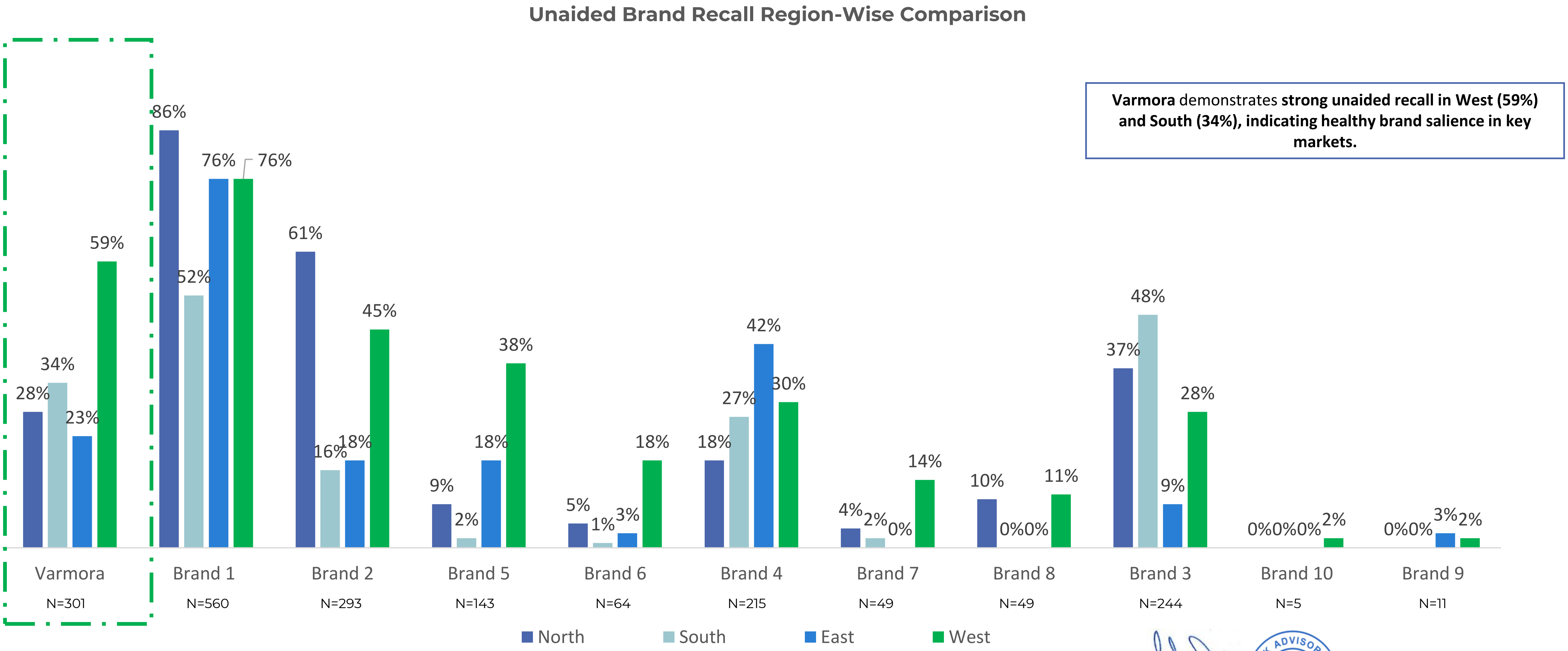
Brand 1 leads unaided awareness across all regions; Varmora ranks among the top three in the West and South



(Section 2 –Brand Awareness, Source of Awareness- Unaided Brand Recall)

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Managing Director

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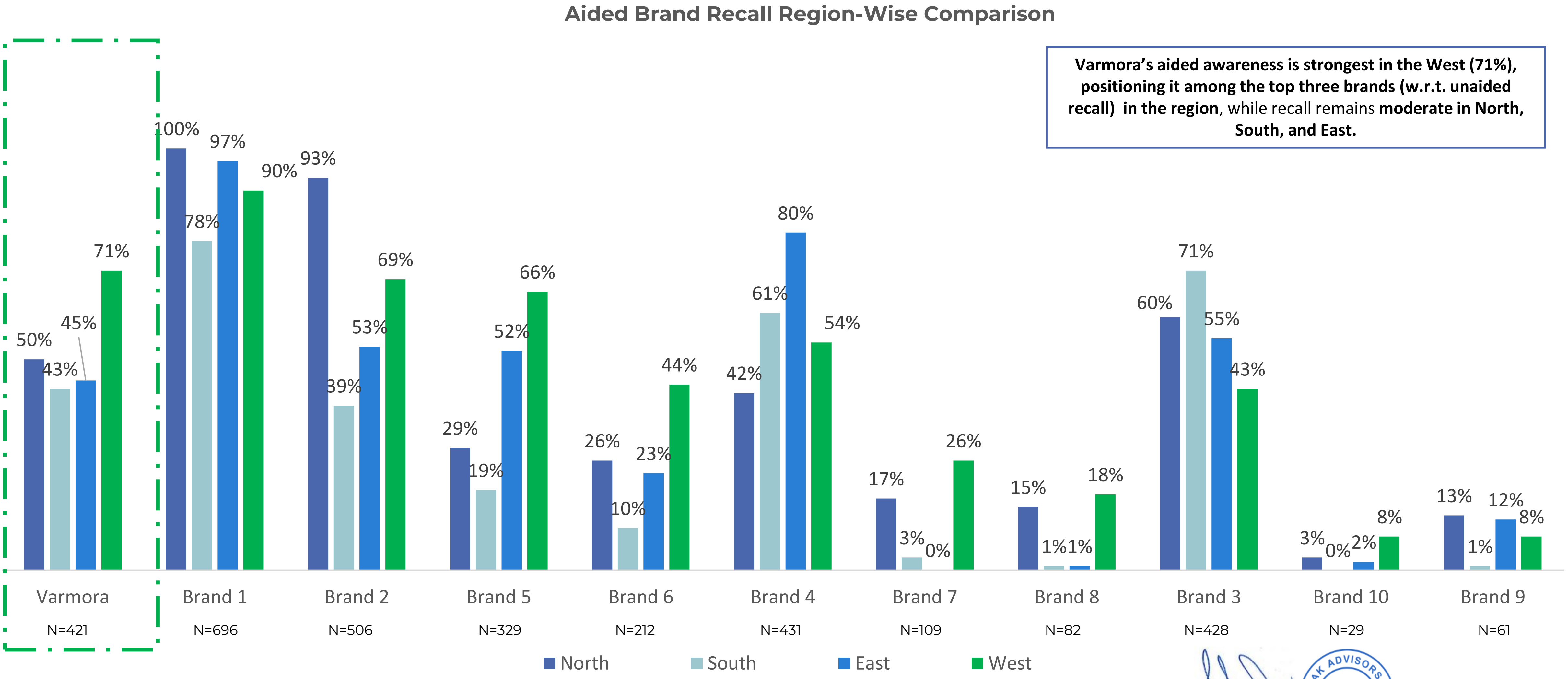
Brand 1 showcases high recall across regions; High aided brand recall for Varmora in West India



(Section 2 –Brand Awareness, Source of Awareness- Unaided Brand Recall)

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Managing Director

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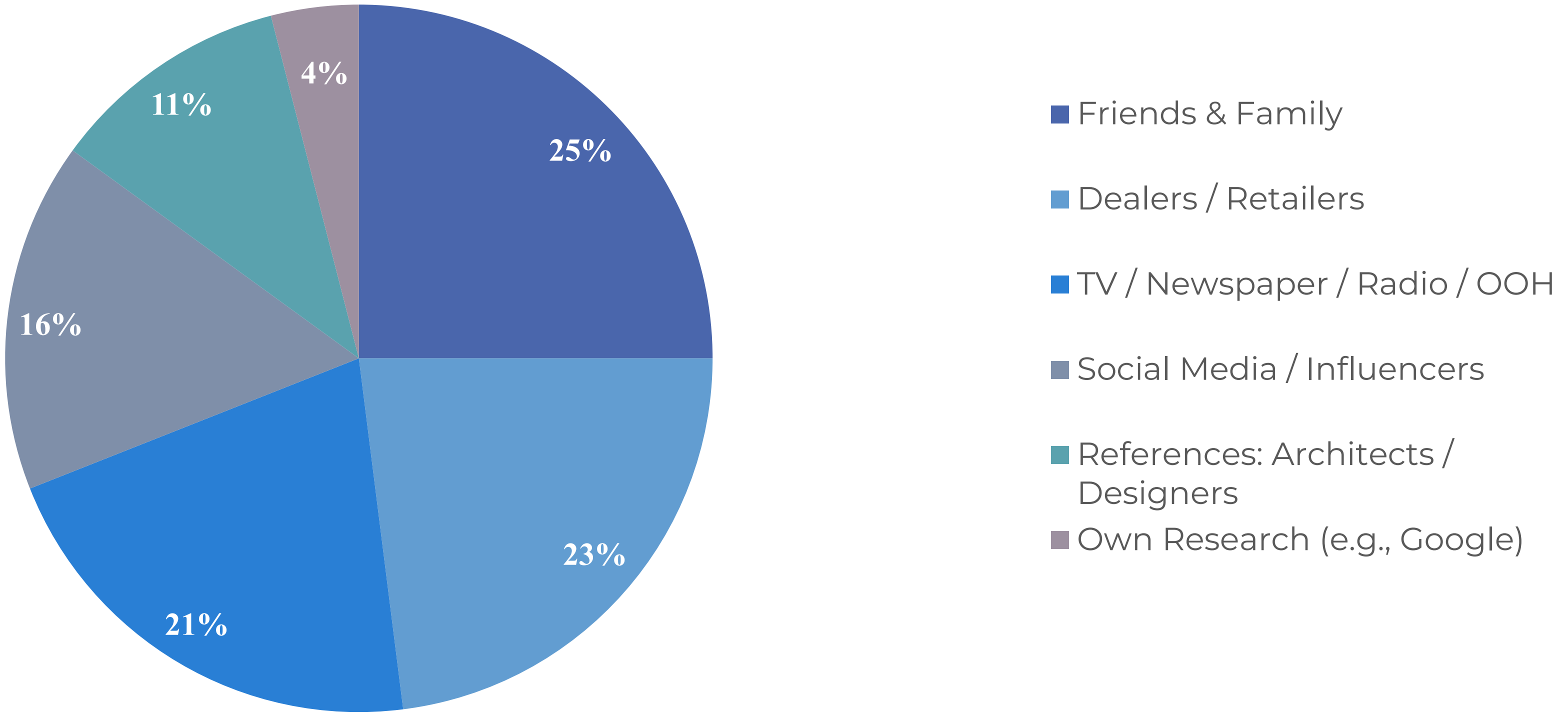
Brand discovery in the tile category is driven by a mix of interpersonal and traditional channels. Friends and family (25%), dealers/retailers (23%), and mass media (21%) were the most frequently cited sources of awareness. Social media also played a role (16%), followed by architects/designers (11%). Own research accounted for just 4%, reinforcing the category's offline, recommendation-led nature

n (total mentions) =6,853

Source-Wise Brand Awareness Mentions



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Managing Director

Source to brand awareness have overlaps and brands known to consumers are multiple-this is a multi-brand attribution model- showing total number of times a source was cited for brand awareness by all consumers

(Section 2 –Brand Awareness, Source of Awareness- Source)

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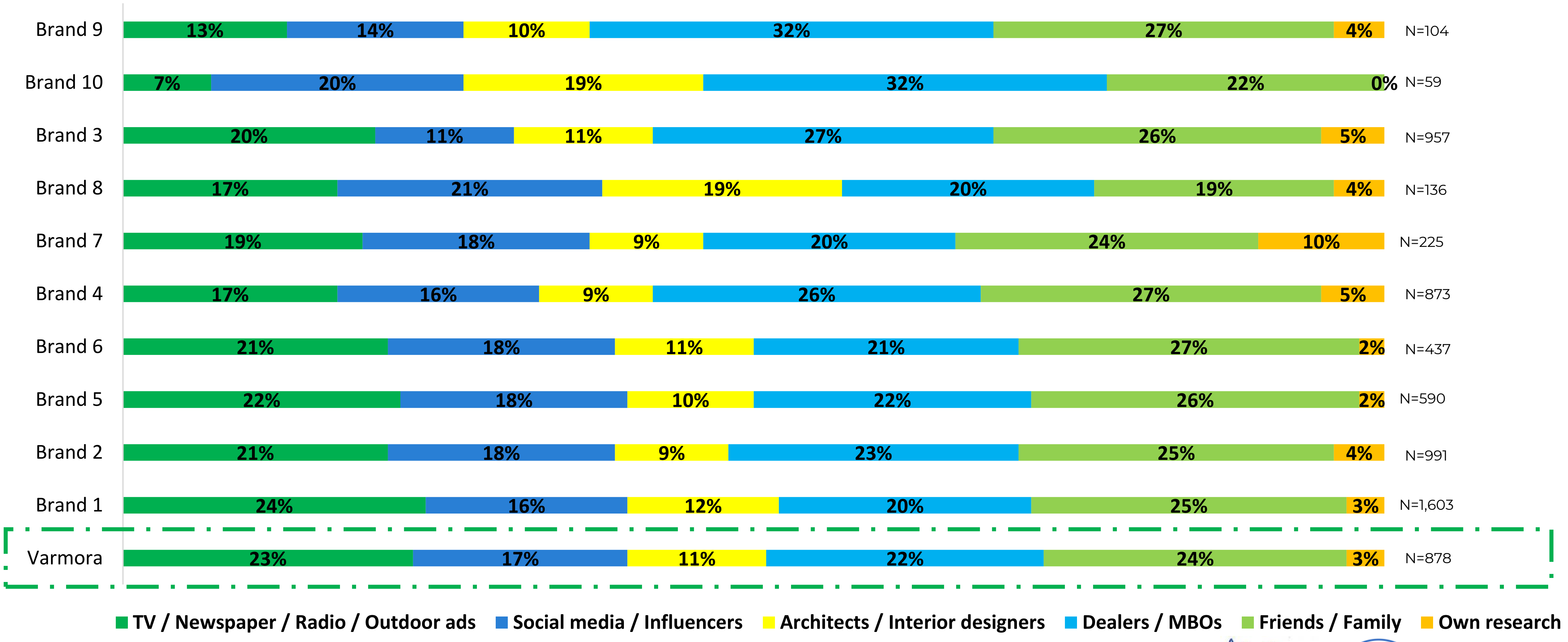
Varmora brand awareness is largely driven by recommendation from friends/ family, above-the-line (ATL) channels such as print, radio, and outdoor ads, and Dealers/ MBOs

% Contribution of Source to Brand Awareness



*Total Number of respondents-766, n here is total number of mentions

(Section 2 –Brand Awareness, Source of Awareness- Source)

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Managing Director

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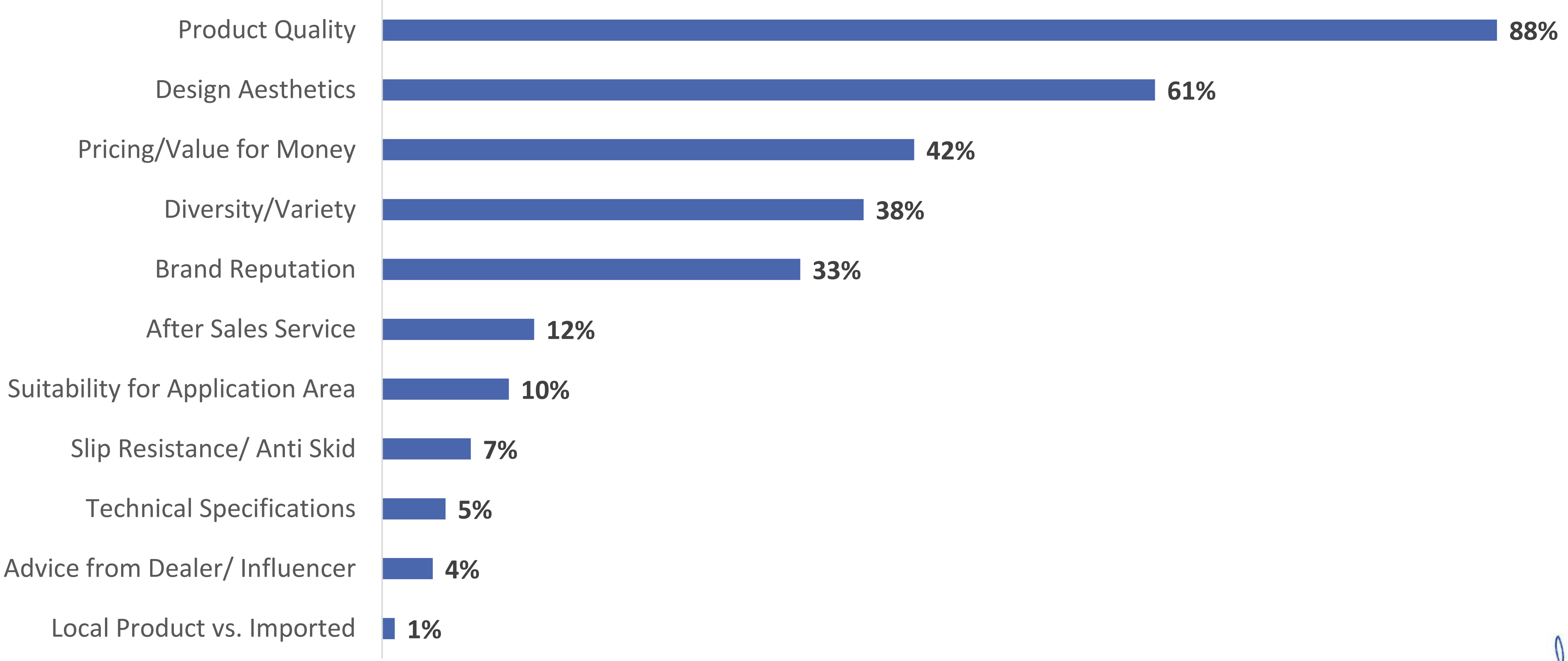
Section iii: Tile Purchase Behaviour

Product quality, design aesthetics, and value for money emerged as the top decision-making criteria for consumers purchasing tiles, followed by durability, brand reputation, and post-sales service, with 88% of consumers ranking product quality and 61% ranking design aesthetics as key purchasing attributes

N=766

Key Purchase Attributes: Ranked in Top 3 by Buyers (%)



*Total Number of respondents(N)

(Section 3, Q4 –Tile Purchase Behavior- Top Drivers by Key Segments)

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Managing Director
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Varmora was the 2nd highest rated brand among select peers on the top five purchase criteria most valued by consumers

N=766

	Varmora	Brand 1	Brand 2	Brand 3	Brand 4	Brand 5	Brand 6
Product Quality	4.2	4.3	3.9	4.0	3.9	3.7	3.7
Design Aesthetics	4.0	4.1	3.7	3.8	3.8	3.7	3.7
Pricing/Value for Money	3.9	4.1	3.8	3.8	3.9	3.5	3.5
Diversity/Variety	4.2	4.3	3.8	3.9	3.8	3.7	3.7
Brand Reputation	4.1	4.3	3.8	3.4	3.9	3.5	3.5

Colour scale: 4.3, 4.2, 4.1, 4.0, 3.9, 3.8, 3.7, 3.5, 3.4

*Total Number of respondents(N)

(Section 3, Q4 –Tile Purchase Behavior- Brand Ratings on a scale of 1-5)

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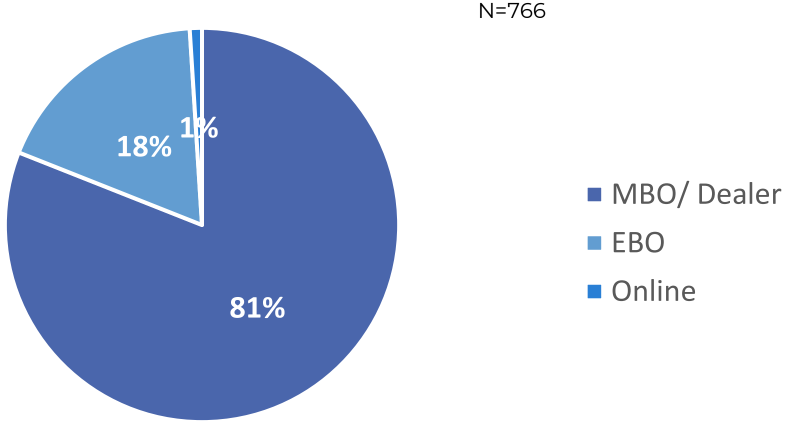
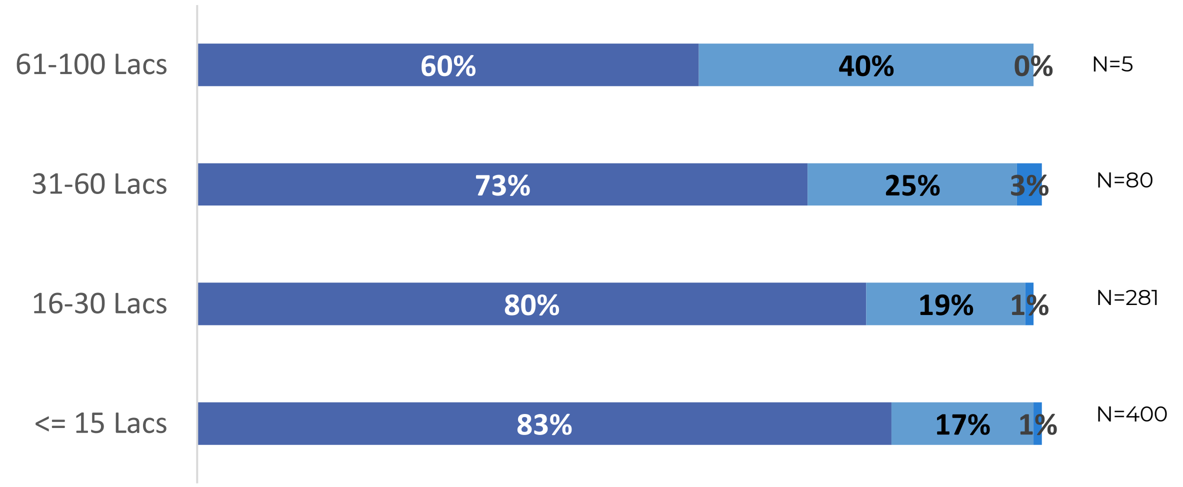
MBOs remain the dominant channel across cities, income groups, and project sizes, particularly in mid-scale purchases. However, EBOs gain ground with high-income consumers and large projects- reflecting the value of premium service, brand curation, and trust. Online remains niche but sees higher adoption (11%) for small tile purchases (<=250 sq ft)- indicating its growing relevance for low-volume, convenience-driven buyers

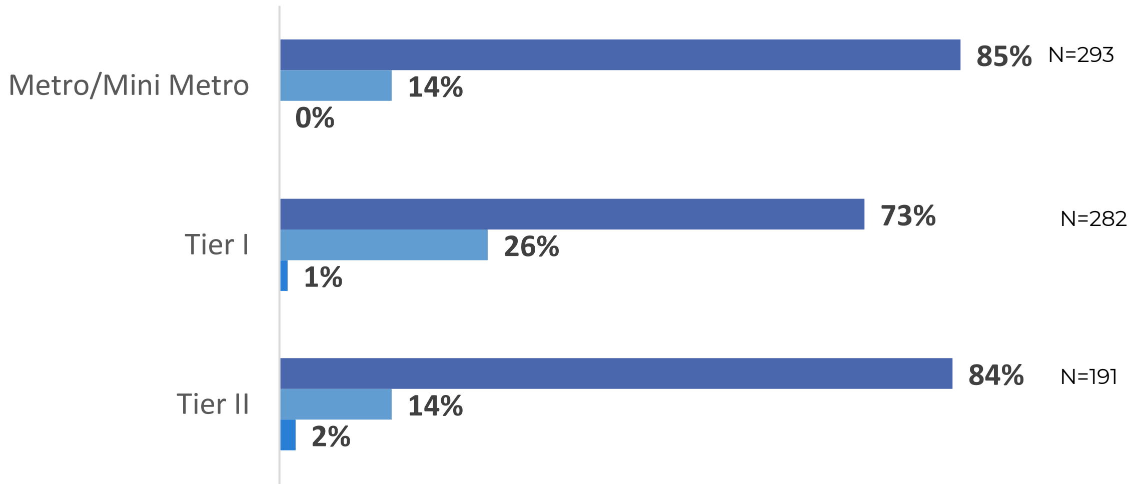
Overall Rating



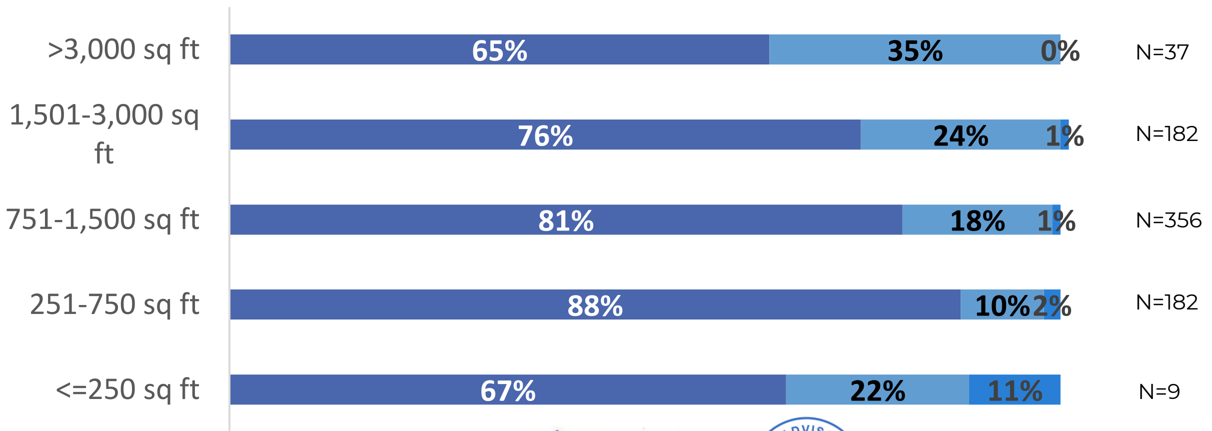
By Annual Household Income



By City Tier



By Sq. ft Area



*Total Number of respondents(N)

(Section 3, Q5-Tile Purchase Behavior- Sales Channel Preferences)

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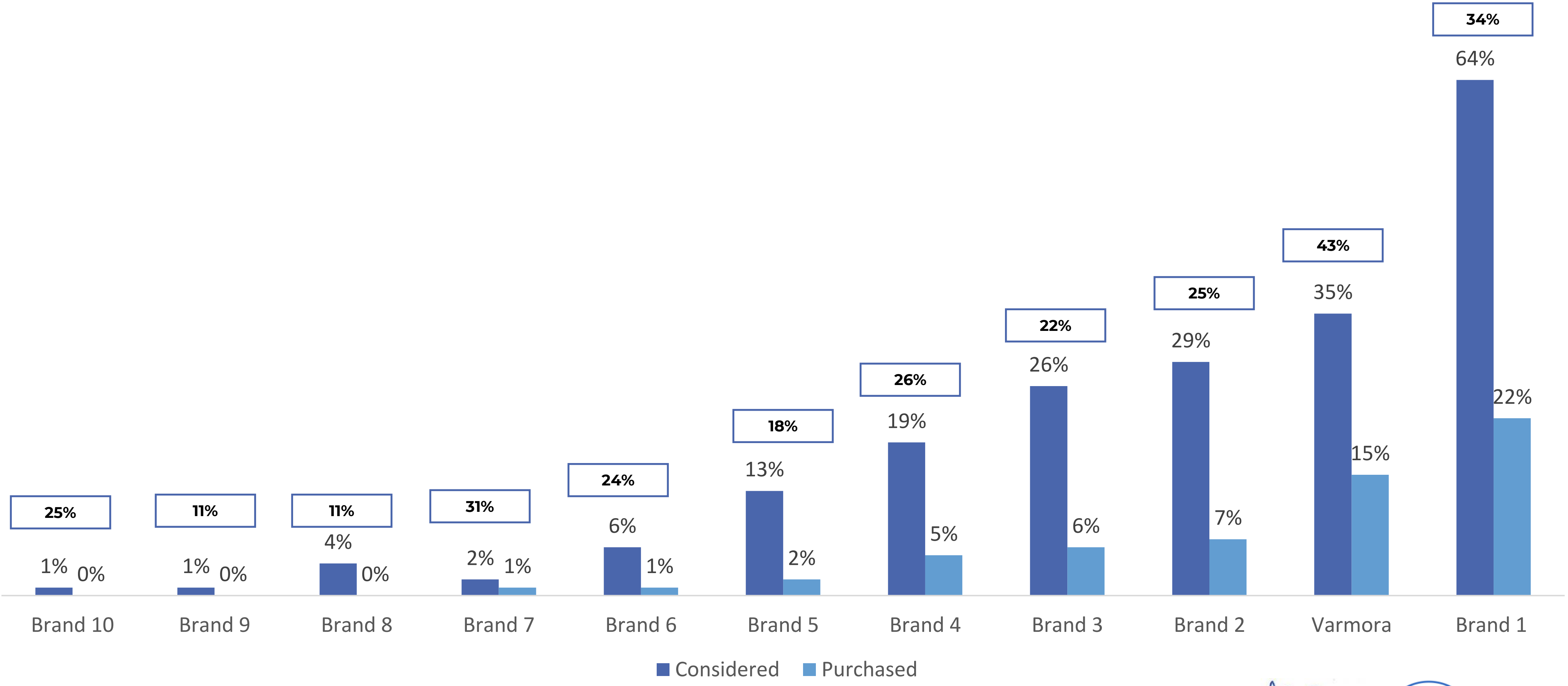
Varmora had the 2nd highest brand consideration rate and the highest conversion rate among considered brands, indicating high consumer confidence post-evaluation

N=766

All Brands- Purchase Vs Conversion Rates



*Total Number of respondents(N)

(Section 3, Q6 & Q7–Tile Purchase Behavior- Brand wise purchase conversion rates)

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Managing Director

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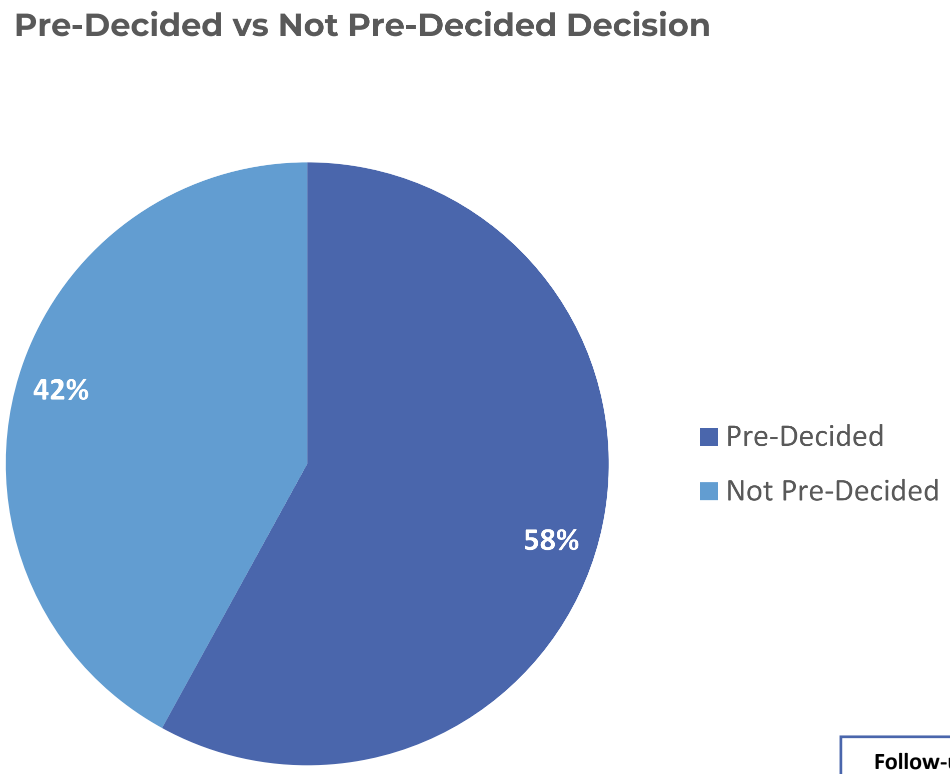
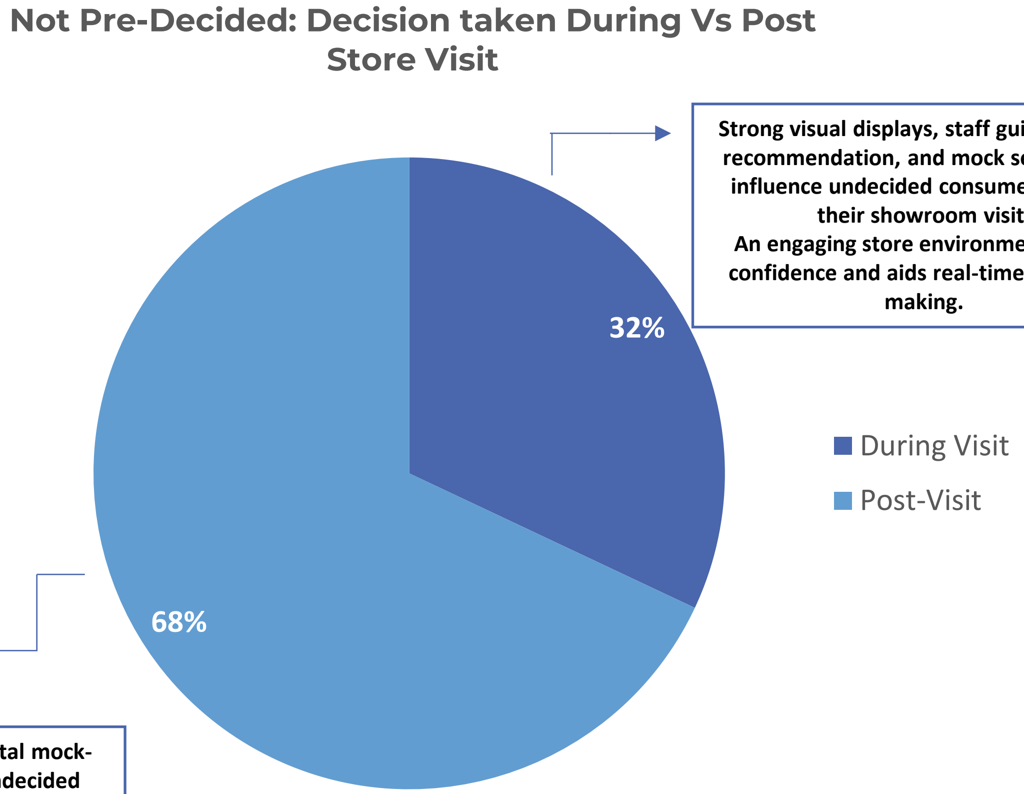
While 58% of respondents had a pre-decided brand in mind, 42% were undecided at the time of store entry. Among the undecided group, 32% made their decision in-store, and 68% finalised it post-store visit





Strong visual displays, staff guidance and recommendation, and mock setups help influence undecided consumers during their showroom visit.
An engaging store environment builds confidence and aids real-time decision-making.

Follow-ups via WhatsApp, digital mock-ups, or offers help convert undecided consumers after they leave.
Timely and personalized outreach keeps the brand top-of-mind and boosts conversion chances.

N=766

*Total Number of respondents(N)

(Section 3, Q8–Tile Purchase Behavior- Predetermined vs in store tile purchase decisions)

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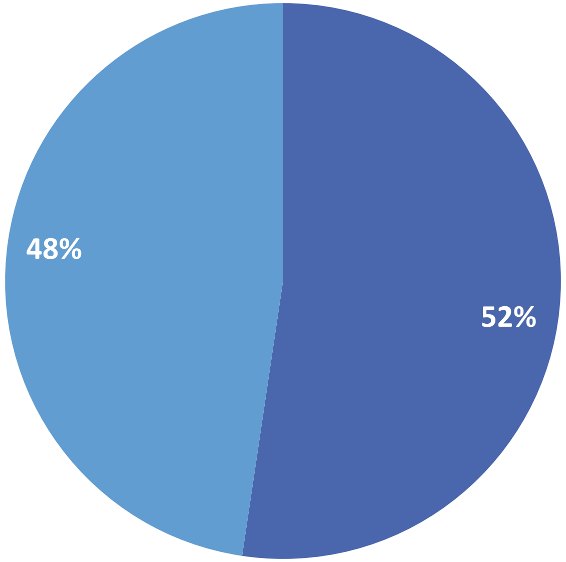
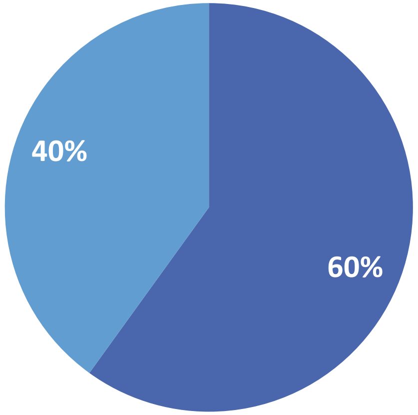
Architects and interior designers influence 52% of purchases, particularly for new home construction (60% of such cases), while in the context of renovation, architects and interior designers account for 38% of purchase decisions

Overall Influence Split

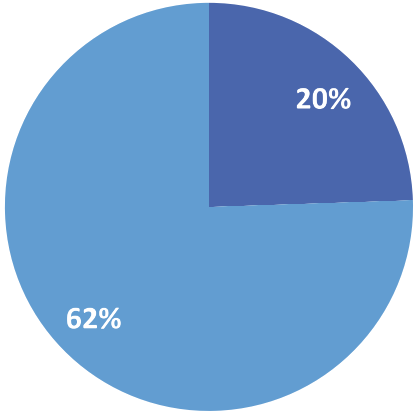


- architect / influencer / contractor influenced final decision
- architect / influencer / contractor did not influence final decision

Influence Split in Case of New Construction



Influence Split in Case of Renovation



In new construction, 60% of buyers depend on professionals for tile selection. In renovation, only 20% report such influence, reflecting more independent or retail-led decision-making.

N=766

*Total Number of respondents(N)

(Section 3, Q12- Role of Industry Influencers in Consumer Brand Choice)

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Section IV: Net Promoter Score (NPS)

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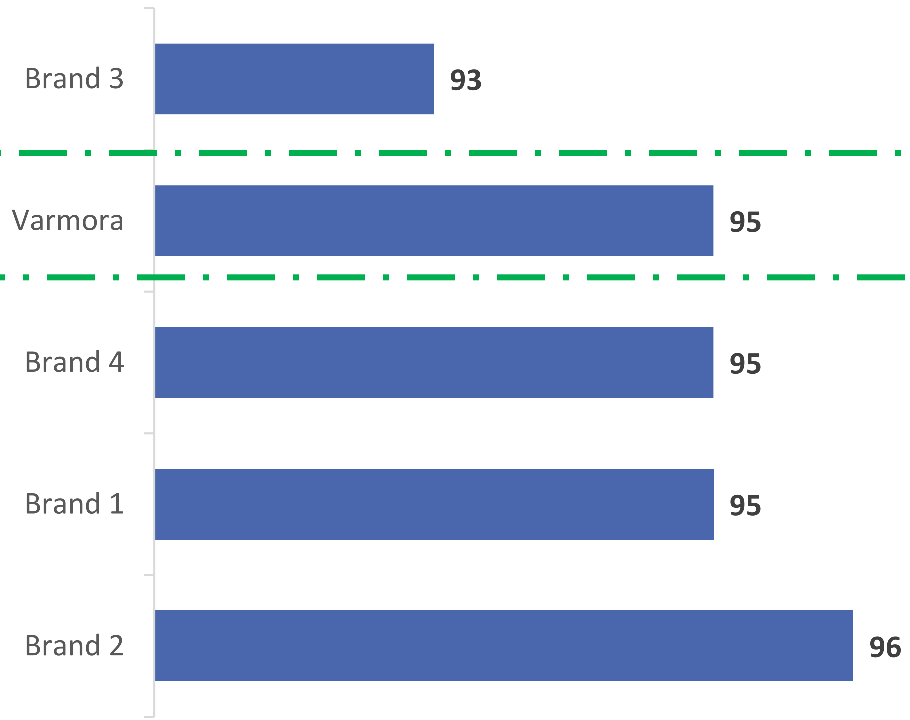
Managing Director

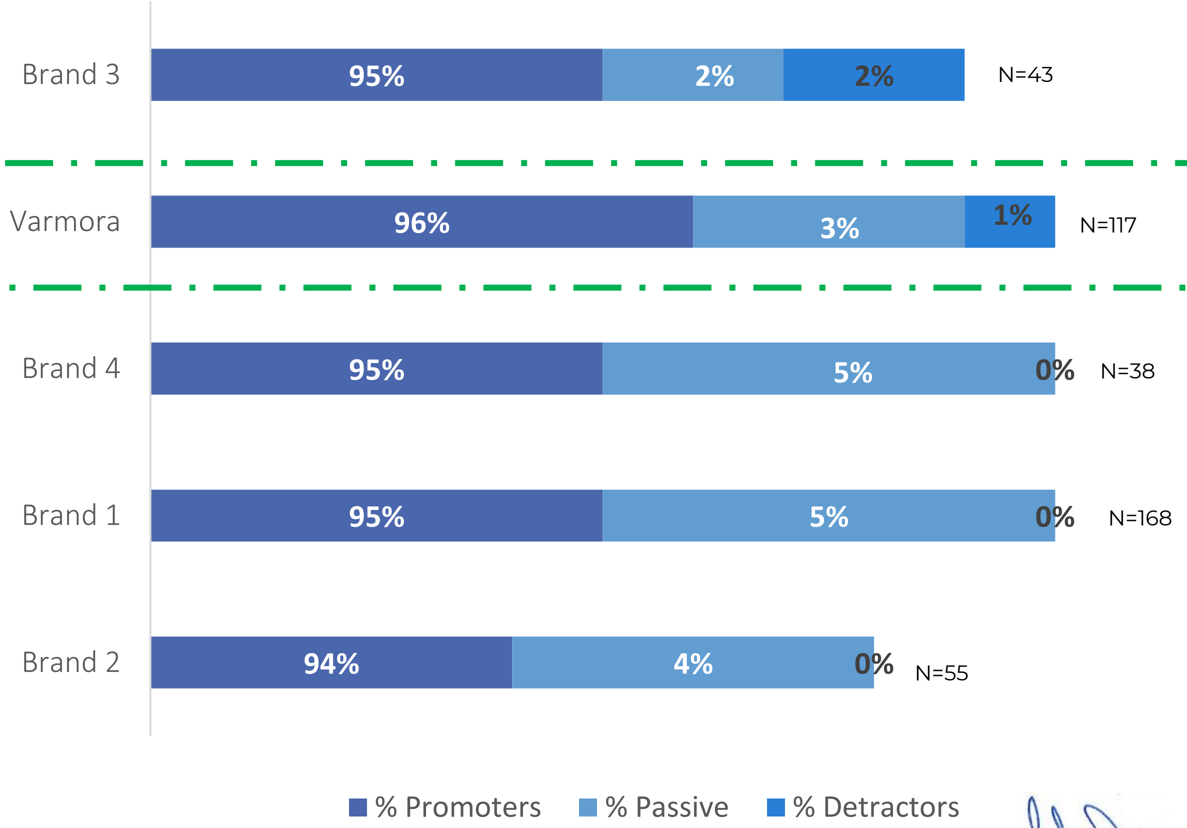
Varmora had the joint 2nd highest NPS among surveyed peers. It performed particularly well in the West, where its promoter base was strongest

Key Brands- Net Promoter Scores



Only brands with more than 20 purchasers considered

Key Brands- % Respondents by Category



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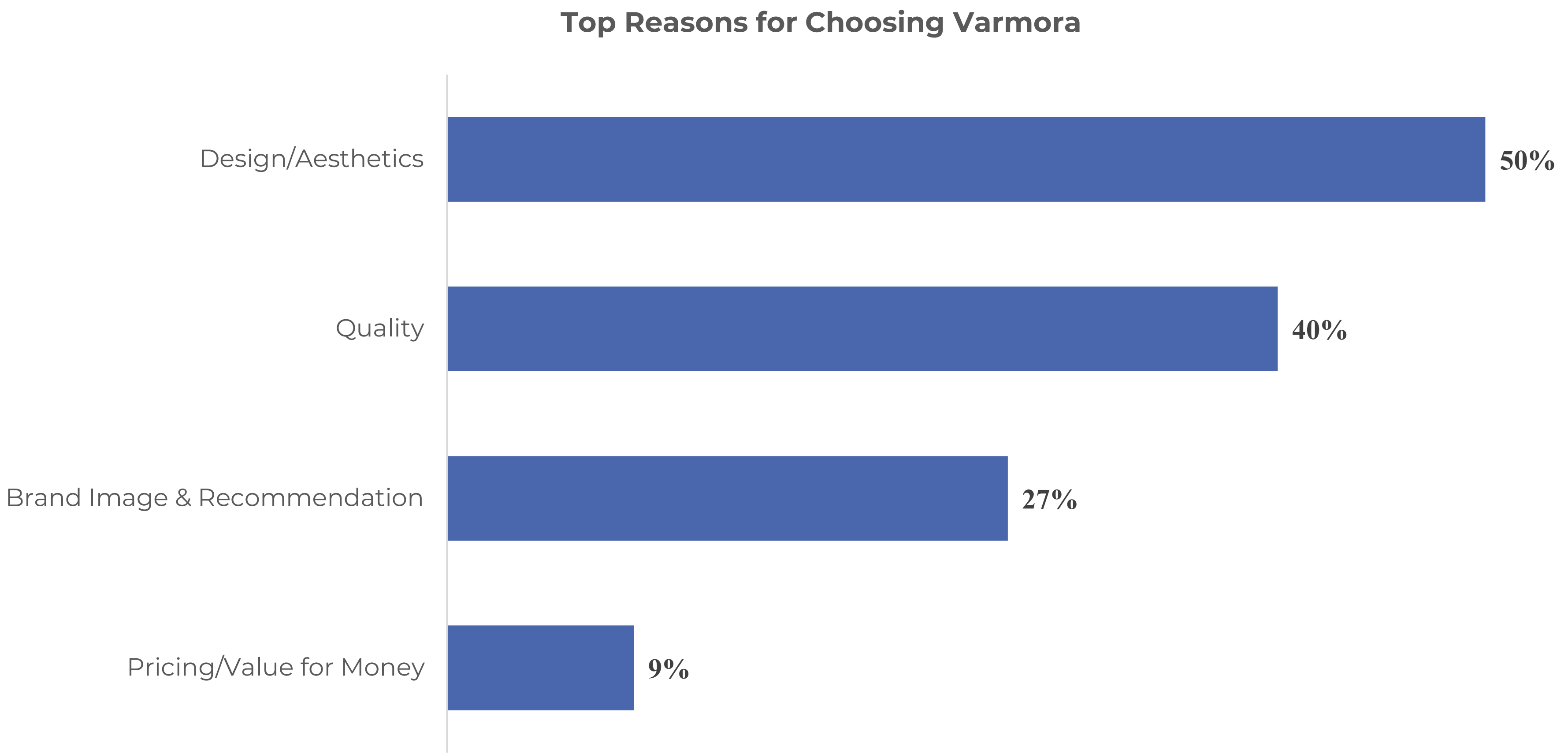
Managing Director

*Total Number of respondents(N)

(Section 4, Q13- Net Promoter Score:- How likely are you to recommend the recently purchased tile brand/s to a friend/family/ colleague? Rate on a 0–10 (0 = Not at all likely, 10 = Extremely likely))

The primary reason cited for choosing Varmora was design and aesthetic appeal, while the most common reason for not choosing the brand was limited awareness



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Managing Director

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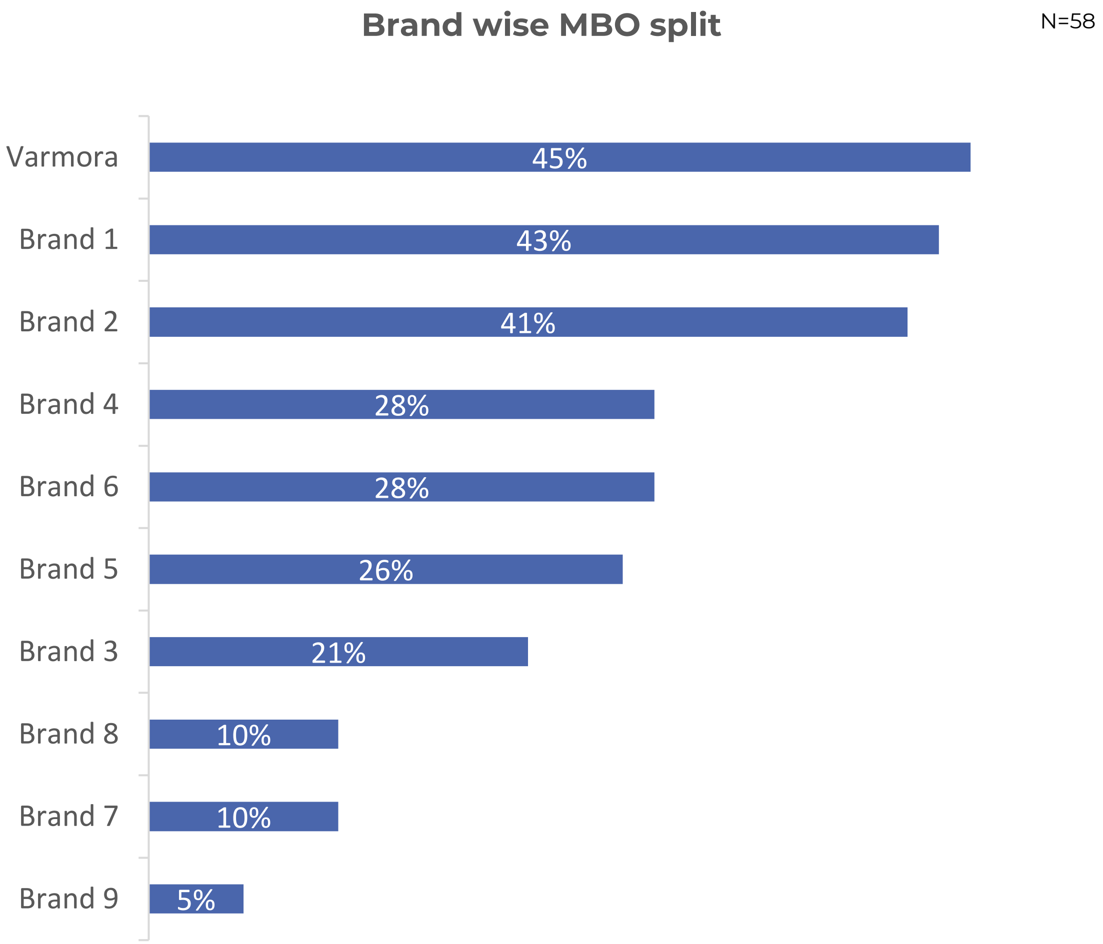
2. MBO & EBO Research Report

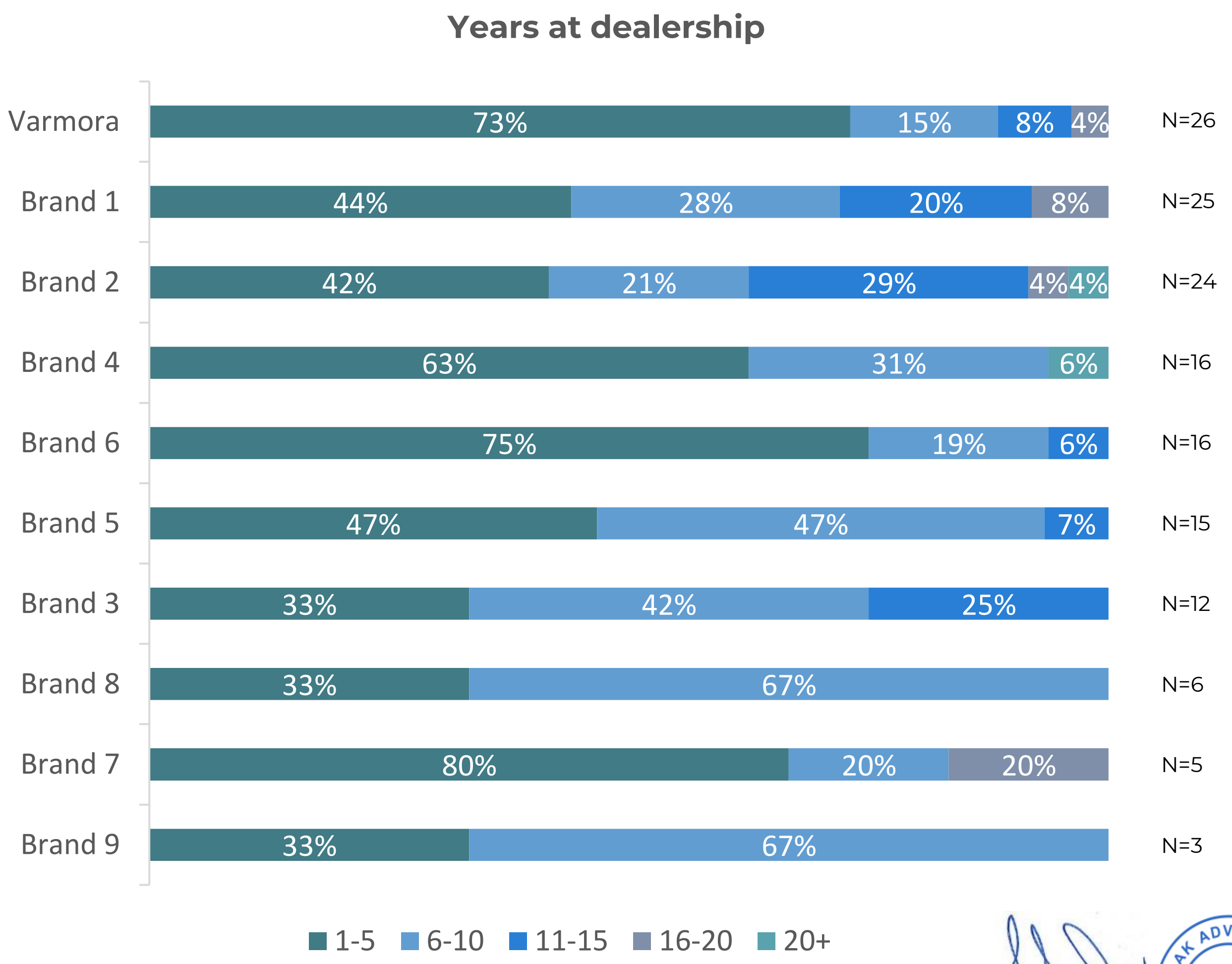
MBO Research Insights

Brand Coding

Brand	Code
Varmora	Varmora
Kajaria	Brand 1
Somany	Brand 2
CERA	Brand 3
Johnson	Brand 4
Simpolo	Brand 5
Orientbell	Brand 6
AGL	Brand 7
RAK	Brand 8
NITCO	Brand 9
HSIL	Brand 10

MBO Demographics





(Section I, Q1- brands stocked, years at dealership, top 3 brands)

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Managing Director
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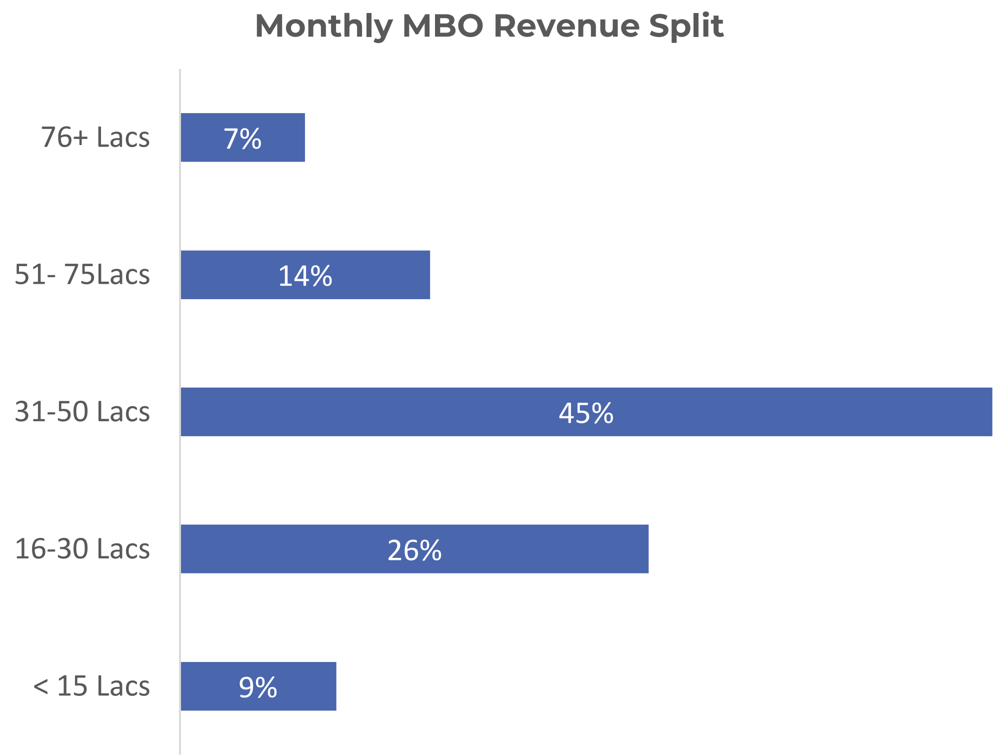
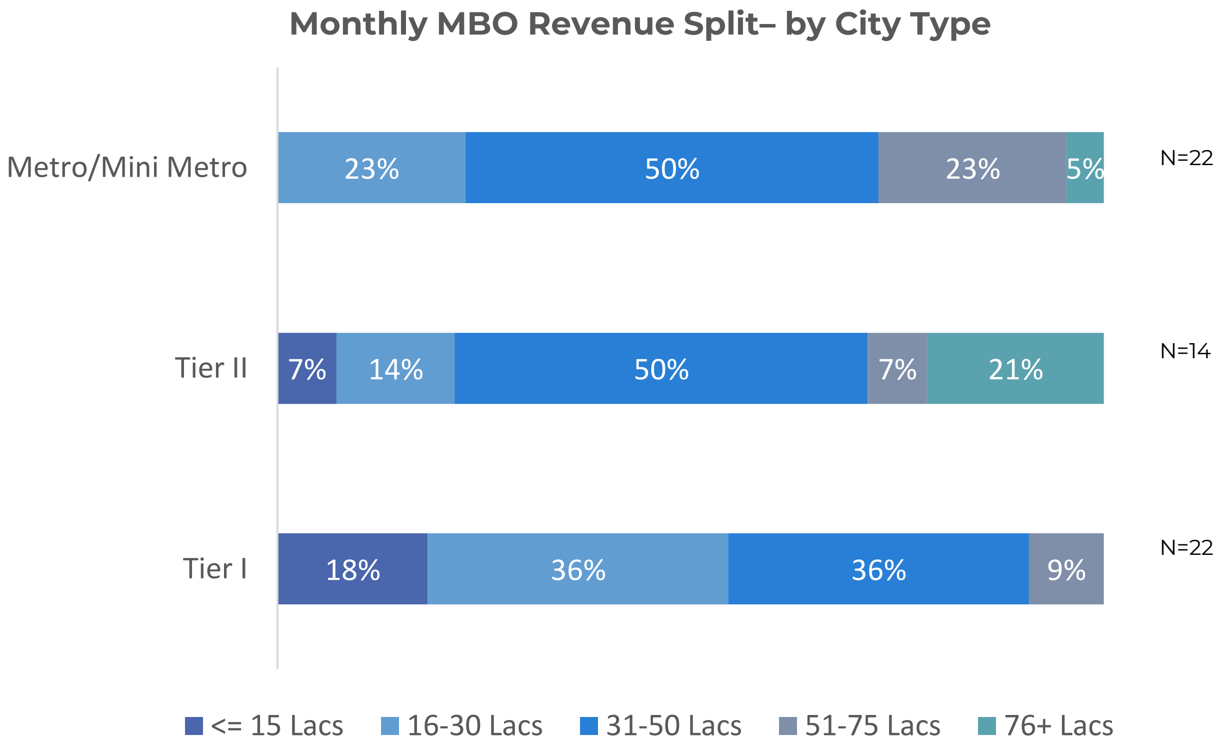
Majority of MBOs reported monthly revenues in the ₹31–50 lakh bracket (45% overall), with consistent trends across metro, Tier I, and Tier II cities

N=58





(Section II, Q2- Dealership Profile- What is your approximate average monthly revenue from tile sales?)

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Managing Director

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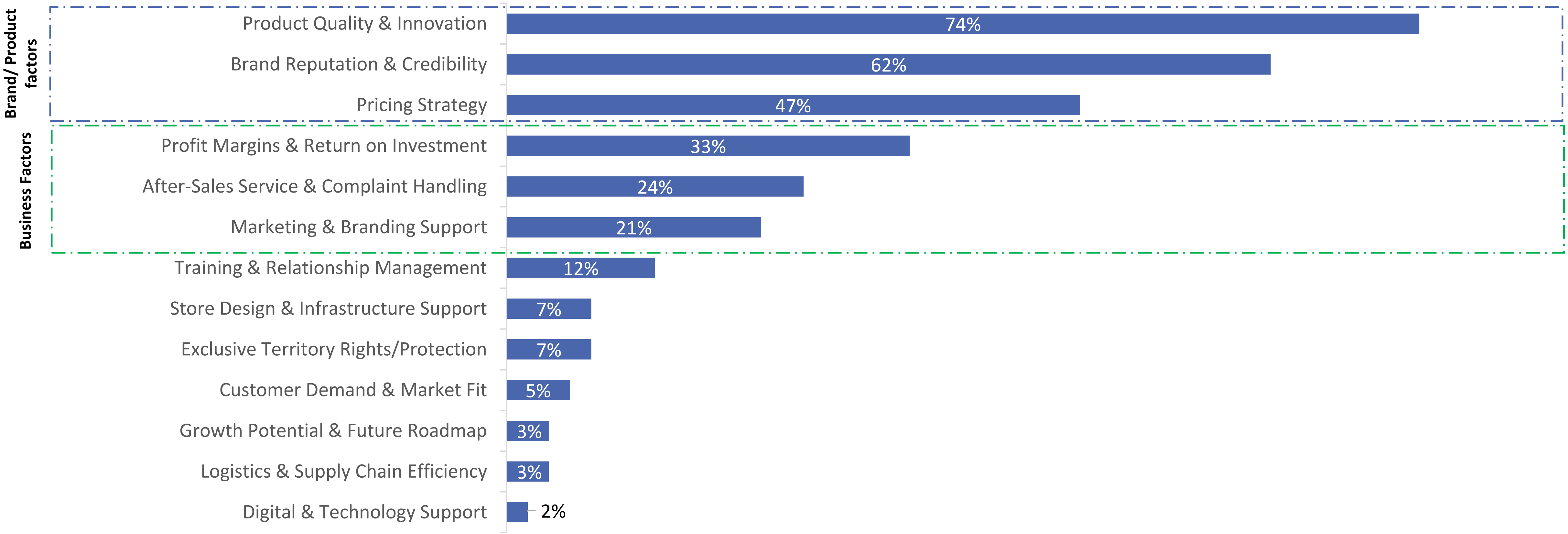
While brand and product-related factors such as product quality and innovation (74%), brand reputation and credibility (62%), and pricing strategy (47%) are expected and commonly prioritised, MBOs also consider key business-related enablers when evaluating dealership partnerships. Profitability/ROI (33%), after-sales service and complaint handling (24%), and marketing and branding support (21%) emerge as the top business factors influencing their decision-making

Top Criteria Considered by MBOs While Shortlisting Tile Brands for their dealership

N=58



(Section II, Q2-Benchmarking Tile Brands- What are the top 3 key performance criteria you look for in a tile brand while shortlisting for your MBO? How would you rate the below brands on these attributes on a scale of 1 to 5?)

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Managing Director

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Varmora was ranked the highest among surveyed brands on 3 out of 5 top dealer key performance critieria, namely , product quality, profitability/ROI, and after-sales service

	Varmora	Brand 1	Brand 2	Brand 3	Brand 5	Brand 6
Product Quality & Innovation	4.3	4.6	4.5	3.6	3.6	3.9
Brand Reputation & Credibility	3.9	3.8	3.8	3.7	3.8	3.5
Pricing Strategy	3.7	4.6	4.3	4.2	3.3	3.6
Profit Margins & Return on Investment	4.0	4.5	4.3	4.4	3.8	4.0
After-Sales Service & Complaint Handling	4.0	3.0	3.3	3.0	5.0	4.1

5.0
4.8
4.5
4.4
4.3
4.2
4.0
3.9
3.7
3.8
3.5
3.3
3.0

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Managing Director

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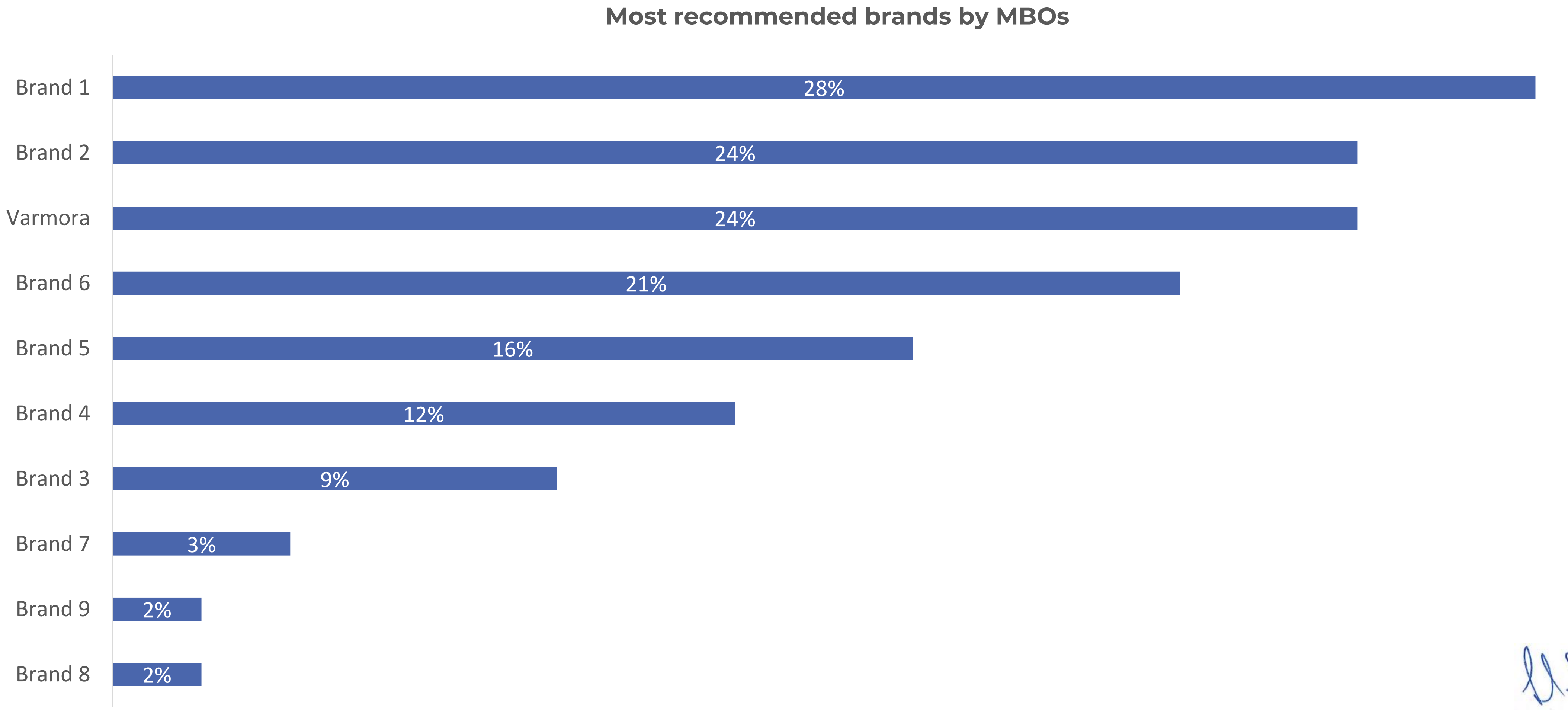
Varmora was the joint 2nd most recommended brands by MBOs, reflecting strong dealer confidence and brand preference

N=58



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Managing Director

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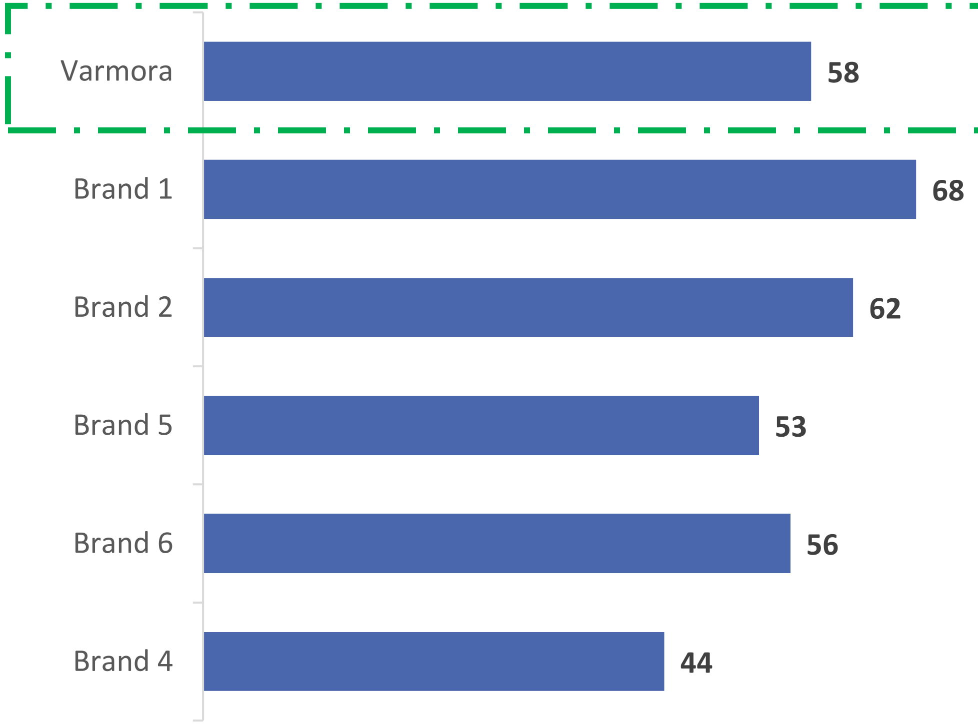
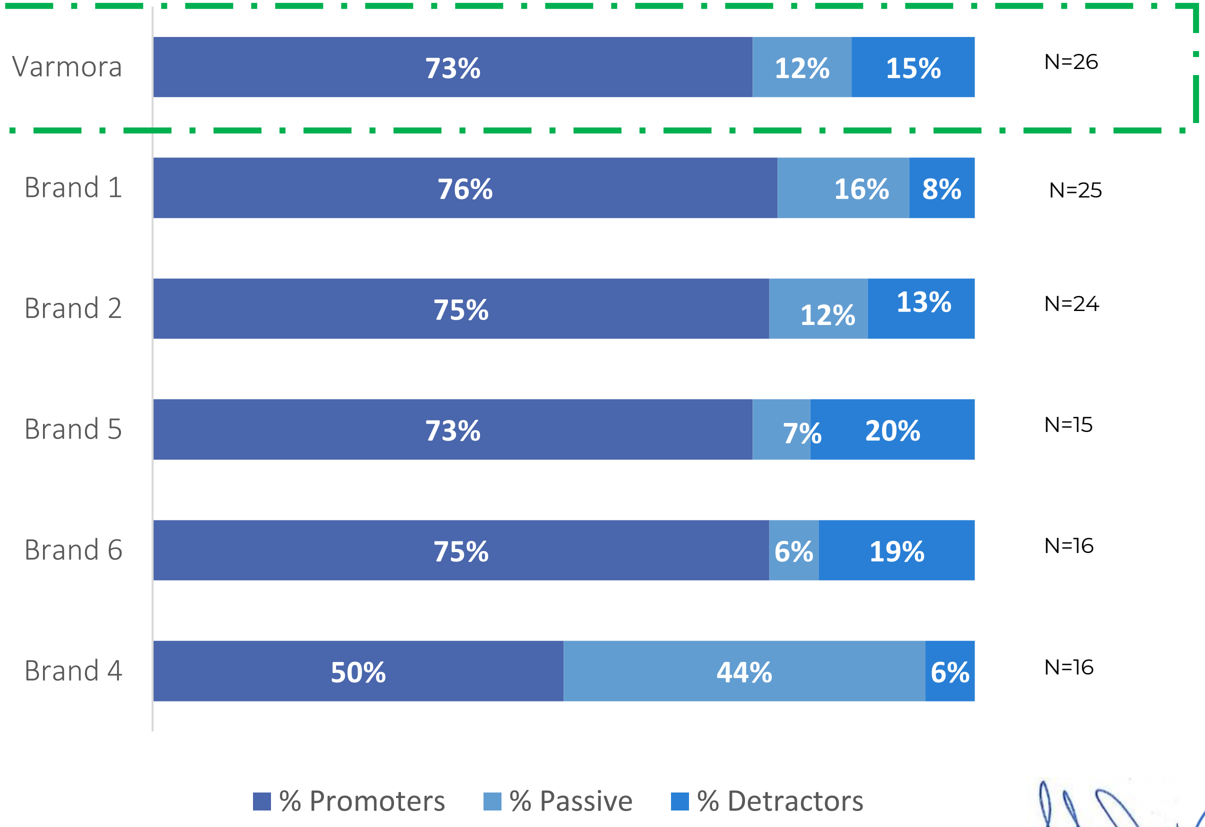
Varmora recorded the 3rd highest NPS score, indicating channel partner satisfaction and likelihood to recommend

Key Brands- Net Promoter Score



Key Brands- % Respondents by Category



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Managing Director

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(Section IV Q5. Promoter Score by MBO- How likely are you to recommend the below brands to your customers? For this brand would you consider upgrading your store to an EBO?

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EBO Research Insights

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Managing Director
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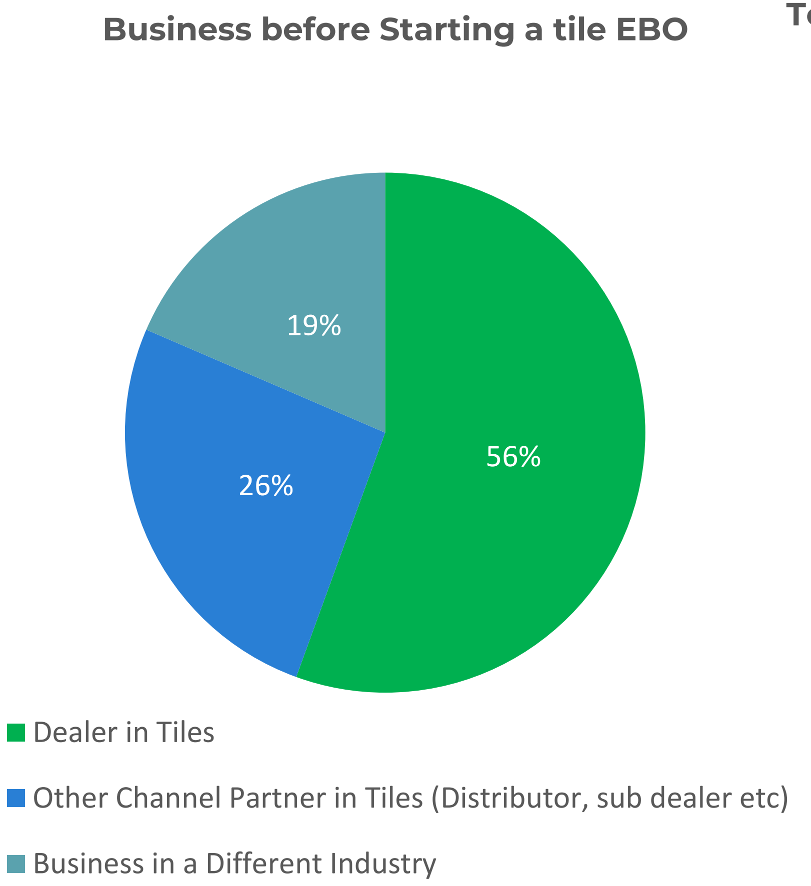
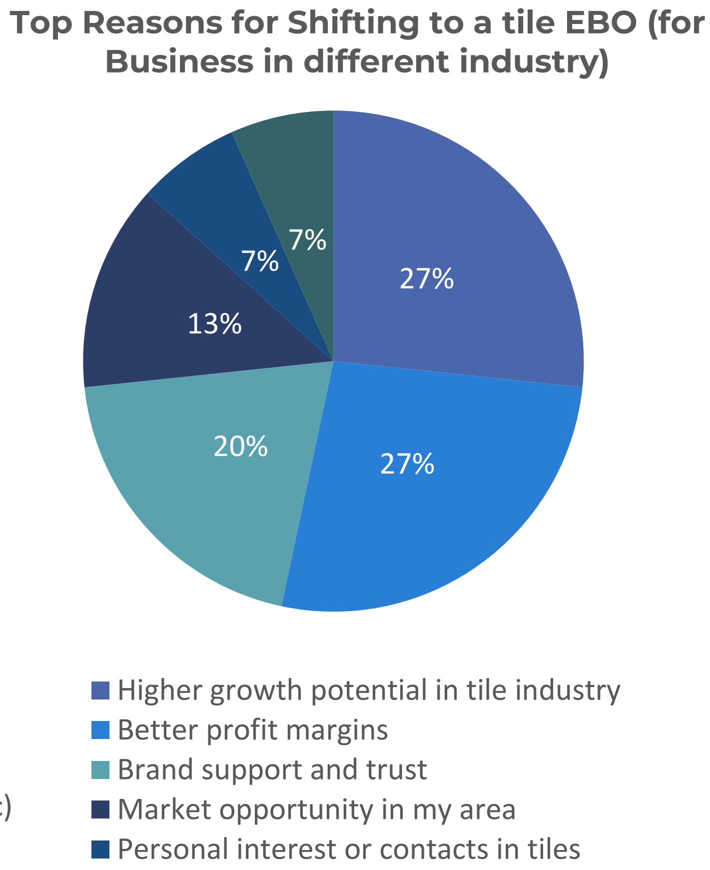
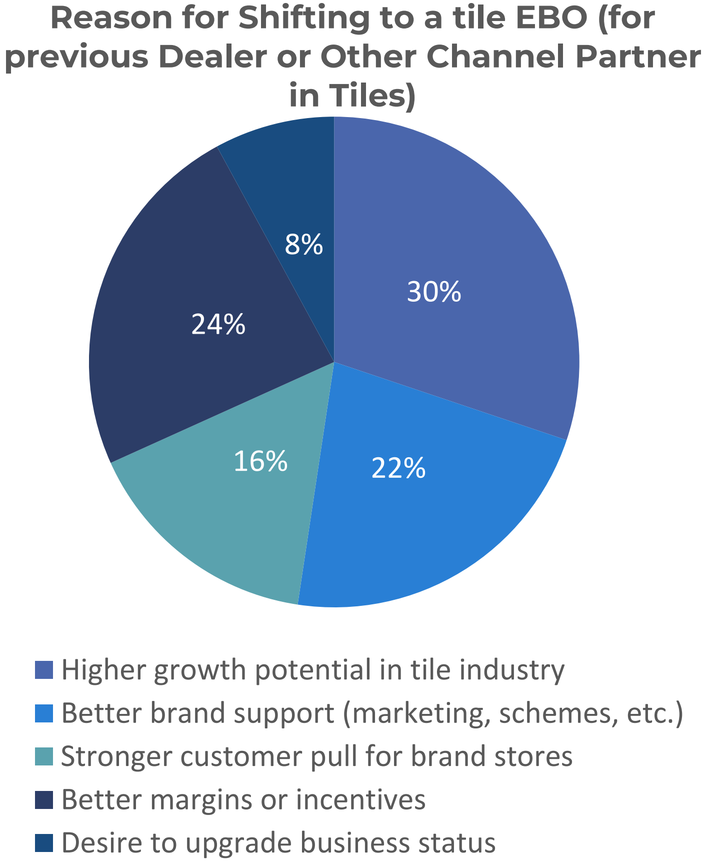
Majority EBO owners have prior experience in the industry as dealers/ other channel partners-







(Section I, Q5, Q6 & Q7- Brand Partnerships-What was your business before starting this brand EBO? & . If selected “Business in a different industry” above. What were the main reasons for shifting to a tile EBO? & If selected “Dealer or other channel partner in tiles” above. What were the main reasons for shifting to a tile EBO?)

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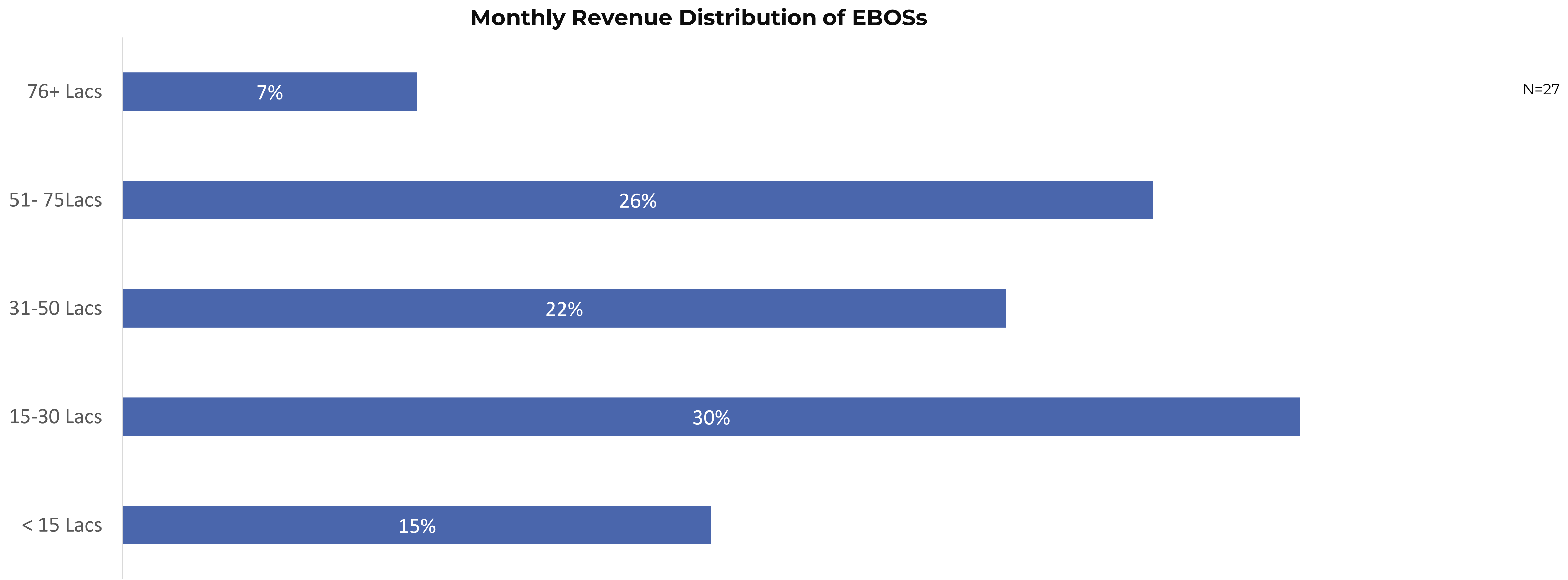
Managing Director

Tile EBOs reported a varied revenue spread, with most falling in the INR 15–30 lakh/month bracket (30%), followed by INR 51–75 lakh/month (26%), reflecting diversity in outlet scale and business performance

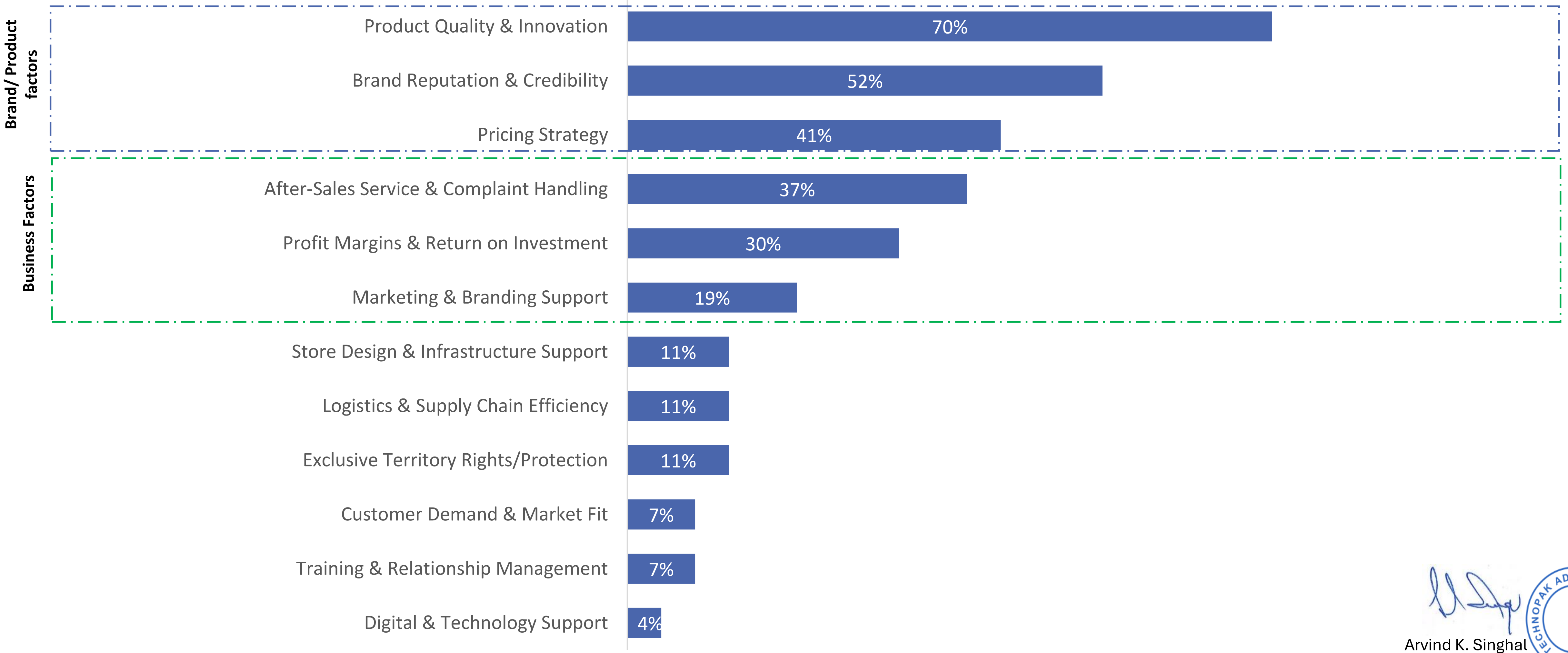


(Section I, Q2- Brand Partnerships- What is your approximate average monthly revenue from tile sales?)

Arvind K. Singhal
Managing Director

While brand and product-related factors such as product quality and innovation (70%), and brand reputation and credibility (52%) are commonly expected and often treated as hygiene factors, EBOs place significant importance on business enablers. The top three business-related criteria include after-sales service and complaint handling (37%), profit margins and return on investment (30%), and marketing and branding support (19%).

Key Attributes by EBOs to partner with a brand



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(Section I, Q4-Brand Partnerships- What key qualities you look for in a brand before investing/ deciding to take up exclusive brand partnership/ EBO?)

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Managing Director

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