IDSA
INDIAN DIRECT SELLING ASSOCIATION
WFDSA Member

Indian Direct Selling Industry

FY 2023-2024 Insights & Trends

Annual Survey Report 2023–24

Knowledge Partner
Ipsos Strategy3

मंत्री
खाद्य प्रसंस्करण उद्योग मंत्रालय
भारत सरकार

सत्यमेव जयते

MINISTER
FOOD PROCESSING INDUSTRIES
GOVERNMENT OF INDIA

Chirag Paswan
चिराग पासवान

Message

It gives me immense pleasure to know that the Indian Direct Selling Industry Association is releasing its Annual Survey 2023-24, for a sector that has consistently demonstrated resilience, innovation, and a significant contribution to India's economic growth. Direct selling Industry in India has emerged as a powerful catalyst in empowering entrepreneurs and creating employment opportunities across urban and rural India.

The Indian direct selling industry has shown remarkable growth over the years, with its turnover steadily increasing and its impact on the economy becoming more pronounced. Even during challenging times like the pandemic, this industry proved its resilience by adapting to new market dynamics and sustaining consumer trust. This reflects not only the strength of the business model but also the dedication of millions of direct sellers across the country.

Direct selling aligns seamlessly with our national vision of "Aatmanirbhar Bharat" (Self-Reliant India) by promoting entrepreneurship. As we move forward, it is imperative to ensure that this sector operates within a robust regulatory framework to distinguish genuine businesses from fraudulent entities. The government is committed to fostering a transparent and credible ecosystem for direct selling by framing clear guidelines and policies.

I commend all stakeholders—industry leaders, direct sellers Executive Committee for their relentless efforts in shaping this document. I am confident that this Annual Survey will provide valuable insights into the industry's performance and pave the way for future growth.

Let us continue working together to unlock the full potential of the direct selling industry and make it a cornerstone of India's economic development.

(Chirag Paswan)

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Message from Chairman **IDSA (Indian Direct Selling Association)**

MR. VIVEK KATOCH
Chairman, IDSA

On behalf of Indian Direct Selling Association, it is with immense pride and gratitude that I present the Annual Report for the Direct Selling Industry in India for the year 2023-24. This year has been a testament to the resilience, adaptability, and innovation of our industry as we continue to empower millions of individuals and contribute significantly to India's economic growth.

The consistent growth of India's direct selling industry over the years is substantiated by the Compound Annual Growth Rate (CAGR) and it has been able to sustain over the years. I am pleased to announce that amidst the challenges of the ever-evolving regulatory framework and the introduction of inclusive monitoring mechanisms by the state governments, the direct selling industry has moved up along its upward trajectory with a year-on-year growth rate of ~4.04%.

In the recent times the direct selling industry in India has seen a demographic shift with young and dynamic individuals becoming direct sellers. This shift towards youth has infused fresh energy into the sector that has paved the way for driving technological adoption, entrepreneurial spirit, and introduction of innovative business practices.

The implementation of the Consumer Protection (Direct Selling) Rules, 2021 coupled with the introduction of monitoring mechanism for the direct selling industry by several state governments in India has proven to be a transformative step and has further strengthened our industry's credibility by ensuring transparency, product quality, and consumer protection. These regulations have created a robust framework that benefits all stakeholders—consumers, sellers, and companies alike.

Let us continue this journey of excellence and innovation as we strive to make India one of the top global markets for direct selling in the coming years. As we look ahead, our focus remains on encouraging long-term growth through digital transformation, talent development initiatives, and expanding our reach to every corner of the country. Together, we have built a thriving ecosystem that not only generates livelihoods but also empowers individuals to achieve their dreams. It is therefore, so vital that we align ourselves with government policies and directions.

I want to express my sincere gratitude to IPSOS and the entire IDSA team for their tireless efforts in putting this report together. We would especially want to thank all of the IDSA member companies for their significant contributions that have helped shape this significant report.

Message from Partner & India Head
Ipsos Strategy3

MR. DEEPAK H
Partner & Head at Ipsos Strategy3 India

The global economy continues to experience rapid changes, with many regions navigating uncertainties and transformative shifts in consumer behavior. In India, these dynamics have also prompted significant adaptations across various sectors. India's GDP grew by 8.2% in FY24, reflecting a strong economic rebound.

The Indian Direct Selling Industry continued to demonstrate resilience and adaptability in FY24, navigating through evolving market dynamics and economic fluctuations. In FY24, the industry achieved a year-on-year growth of ~4.04%, reaching an estimated value of INR 22,142 crores. The industry, comprising over 470 companies, experienced mixed growth patterns at the individual company level, with some recording gains and others facing declines. However, at an aggregate level, the overall growth remained positive.

The Direct Selling industry continued to play a vital role in providing both an additional income source and, in many cases, the primary livelihood for individuals. During FY24, the industry added approximately 1.86 lakh Active Direct Sellers, bringing the total to around 88 lakhs.

This report offers comprehensive insights into the industry's performance, highlighting key trends, growth areas, consumer behaviors, and the perspectives of Active Direct Sellers.

We extend our sincere gratitude to all the Direct Selling companies, Active Direct Sellers, and consumers who generously contributed their time and insights to the survey. We also appreciate the IDSA management and team members for partnering with Ipsos as their knowledge partner.

Background of The Study

Background of the Study

Context

The **Indian Direct Selling Association (IDSA)** serves as an **independent self-regulatory body**, overseeing the **Direct Selling sector** in India. Acting as a **liaison between the industry and government bodies**, it **advocates for the interests** of the Direct Selling industry. IDSA collaborates with **government agencies** to drive **policy reforms**, promote **industry growth**, and support **Direct Sellers**. To keep **stakeholders informed**, IDSA publishes an annual **"State of the Industry" report**, offering insights into **industry size**, **trends, growth drivers** and **regulatory frameworks**.

For the **Annual Survey FY 2023-2024**, IDSA partnered with **Ipsos**, a l**eading global market research and consultancy firm**, to conduct a **detailed study** and develop the report. The study aimed to:

- **Assess the current market landscape** of the **Direct Selling industry** in India, including **sales performance across product categories and regions**.
- **Identify key growth drivers** and factors influencing the industry's expansion.
- Conduct **primary research with Direct Sellers** to understand their **selling patterns**, **product preferences**, and overall business perspective.
- Perform a **consumer survey** to explore **purchasing motivations**, identify **challenges**, and uncover **misconceptions** related to **Direct Selling**.

The study employed a **hybrid research methodology**, combining both **primary** and **secondary research**.

- **Secondary research** involved analyzing **financial data** of **Direct Selling entities** from the **Ministry of Corporate Affairs (MCA)** website and reviewing **publicly available articles** and **news clippings** to assess the industry's **current state**.
- **Primary research** targeted **Direct Selling organizations** to gain insights into **market performance**, **regulatory barriers**, and **growth drivers**.
- A **survey with Direct Sellers** captured their **perspectives** and **experiences**, while a **shopper intercept survey** among a **random Consumer sample** was conducted to gauge **consumer awareness** and **perceptions** of **Direct Selling**.

Note: All percentage figures are rounded to one decimal place. For single-choice questions, the total equals 100%. For multiple-choice questions, percentages may not add up to 100% as respondents could select more than one option. Percentages represent the proportion of total responses for each choice.

A Comprehensive view on **Indian Direct Selling Industry**

Executive Summary

Direct selling is a method of **marketing and retailing** goods or services directly to **consumers** through **personal contact**, away from **permanent retail premises**. The products or services are sold through **active direct sellers**, who act as **individual representatives** of the **direct selling entities**. These sellers carry out **product demonstrations** while making such sales.

The **direct selling concept** is considered to have been **kick-started in India** in the **late 1990s**. The industry witnessed **major growth** with many **global players entering the Indian market. Investors** have seen how this platform created a **positive impact** on several other **social and economic parameters**.

In **FY 2023-24**, the **Indian direct selling industry** was valued at approximately **INR 22,142 crores**, reflecting a **4.04% year-on-year growth** from **INR 21,282 crores** in **FY 2022-23.** Over the past **five years (FY 2019-20 to FY 2023-24)**, the industry expanded at a **CAGR of 7.15%**, growing from **INR 16,776** crores to **INR 22,142 crores**.

Wellness & Nutraceuticals remained the **top-selling category**, contributing **64.15% of total sales**, followed by **Cosmetics & Personal Care** at **23.75%**. Together, these **two categories** accounted for **87.9% of total direct selling sales** in **FY 2023-24**.

The **number of Active Direct Sellers** increased to approximately **88 lakhs**, registering a **2.2% Y-o-Y growth** from **86.2 lakhs** in **FY 2022-23. This steady growth indicates that the industry is reaching a stable and mature phase, reflecting its sustained expansion.**

The **gender composition** of **Active Direct Sellers** included **56% Men** and **44% Women**, **reflecting a relatively balanced participation**.

Regionally, the **North** led with a **29.8% share** of **direct selling sales**, followed by the **East** at **24.2%**. At the **state level, Maharashtra** emerged as the **top contributor**, accounting for **13% of gross sales**, closely followed by **West Bengal** with **11.3%**.

CONTENTS

CONTENTS

CONSUMER AWARENESS SURVEY FY 2023-2024

OTHER SECTIONS

Indian Direct Selling Industry

The **Indian Direct Selling industry** was valued at **INR 22,142 crores** in **FY 2023-24**, marking a **4.04% year-on-year growth** from **INR 21,282 crores** in **FY 2022-23**.

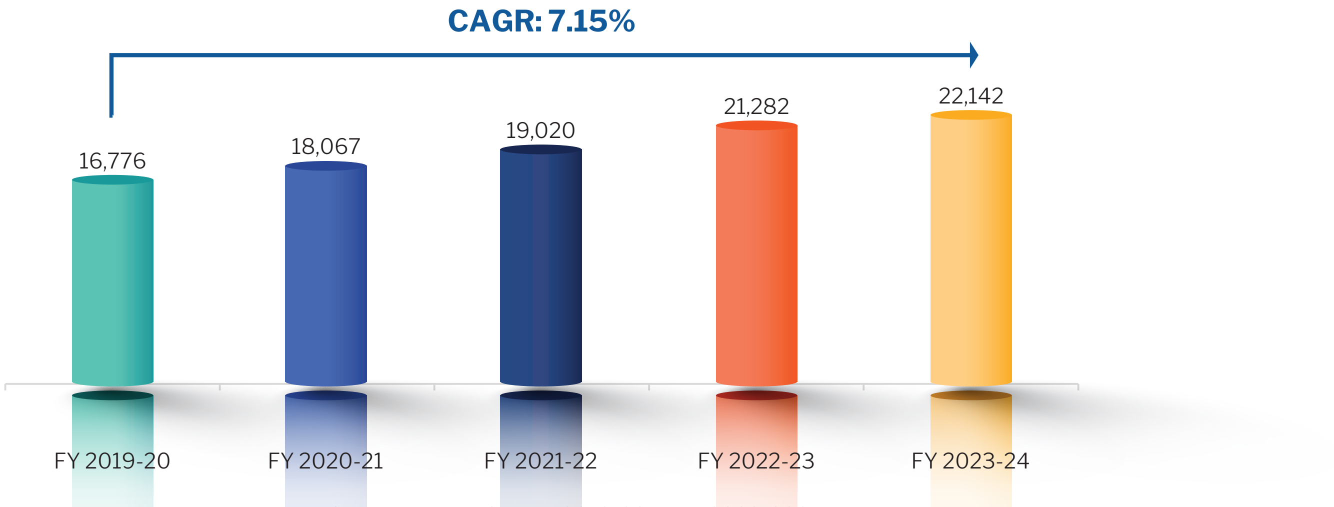


Figure 1. Indian Direct Selling Industry Size FY 2019-20 to FY 2023-2024 (in INR crores)

Indian Direct Selling Industry Sales - Product Wise

The Wellness segment led the **Indian Direct Selling market** in **FY 2023-24**, contributing **64.15%** of total sales, followed by **Cosmetics & Personal Care** at **23.75%**. Together, these two categories accounted for **87.9%** of the industry's total sales. **Household goods** ranked third with a **3.71%** share, bringing the **combined contribution** of the **top three categories** to **91.61%**, underscoring their **market dominance**.

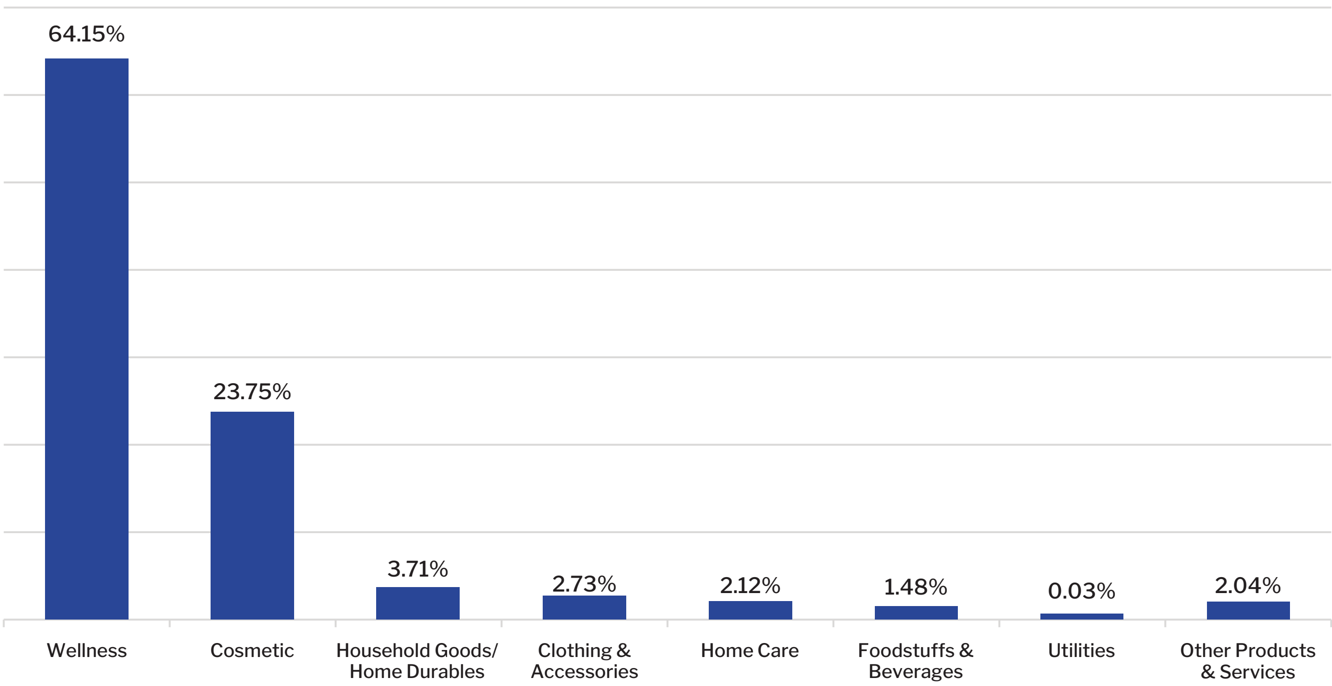


Figure 2. % of sales contribution across different product categories

Share of Product categories FY 2019-20 to FY 2023-2024

The **Wellness** segment has been the dominant category in the Indian direct selling space over the past five years, contributing between **56% and 73%**. This is followed by the **Cosmetics & Personal Care** segment, which contributed between **10% and 24% during the same period**—reflecting **strong consumer demand for wellness and personal care products**.

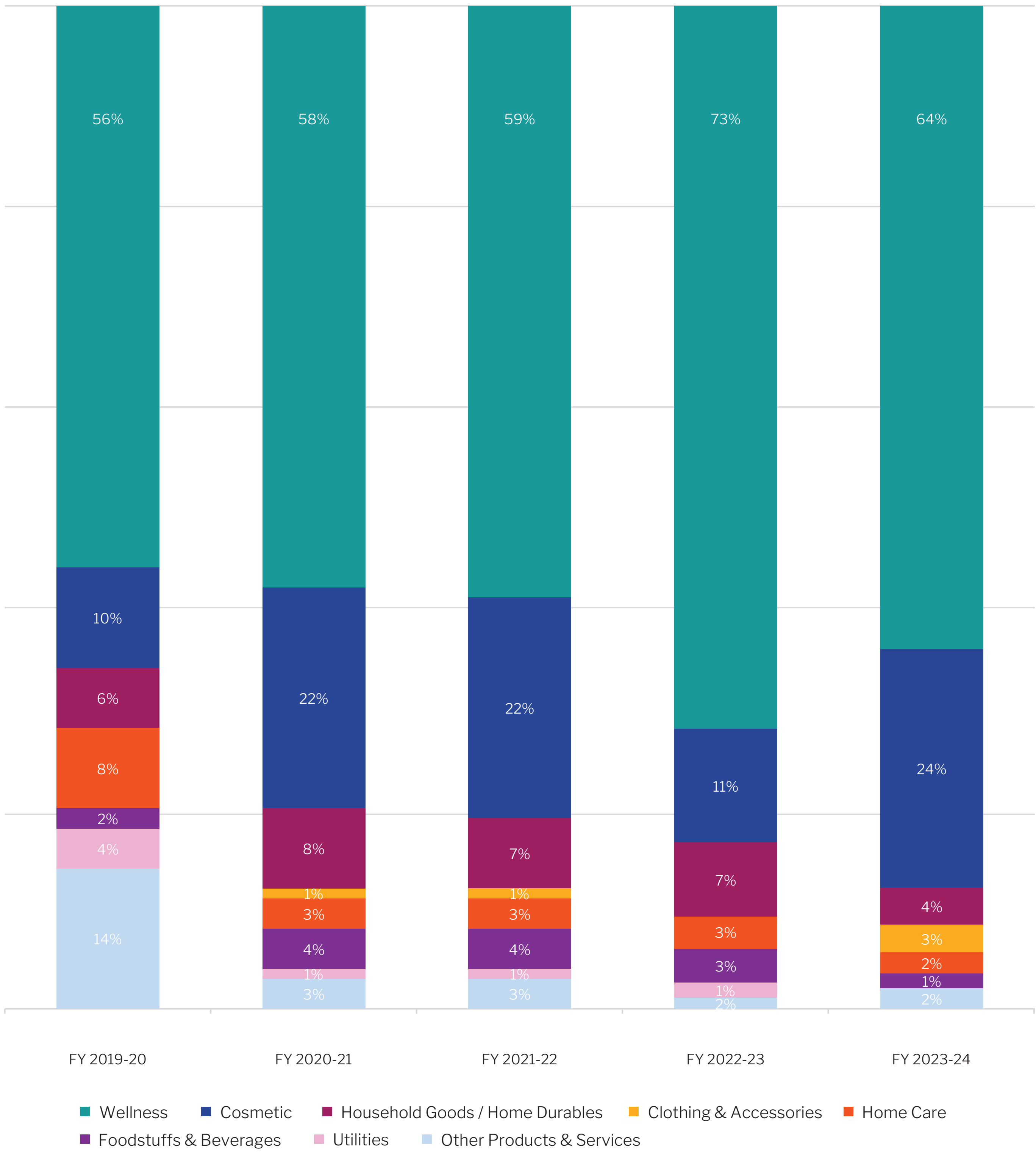


Figure 3. % of sales contribution across different product categories FY 2019-20 to FY 2023 -2024

India Direct Selling Industry Sales - Region wise

In **FY 2023-24**, the **Northern region** emerged as the topmost region in overall gross sales of direct-selling products, accounting for **29.8%** of the total share. This region, comprising **Uttar Pradesh, Rajasthan, Punjab, Haryana, Uttarakhand, Delhi, Himachal Pradesh, Jammu & Kashmir,** and **Chandigarh**, led the market.

The **Eastern region** ranked second with a **24.2%** share, driven by **West Bengal**, which alone contributed **11.3%** to the national turnover. Other key states in this region include **Bihar, Jharkhand,** and **Odisha**.

The **Western region**, covering **Maharashtra, Madhya Pradesh, Goa, Gujarat, Chhattisgarh**, and the Union Territories of **Dadra & Nagar Haveli** and **Daman & Diu**, accounted for **22.4%** of the market.

The **Southern region** contributed **15.3%** to the total gross sales, with representation from **Tamil Nadu, Karnataka, Andhra Pradesh, Telangana, Kerala**, and the Union Territories of **Andaman & Nicobar, Puducherry** & **Lakshadweep**.

Lastly, the **Northeastern region**, consisting of 8 states namely **Assam, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim,** and **Tripura**, collectively accounted for **8.3%** of the total sales.

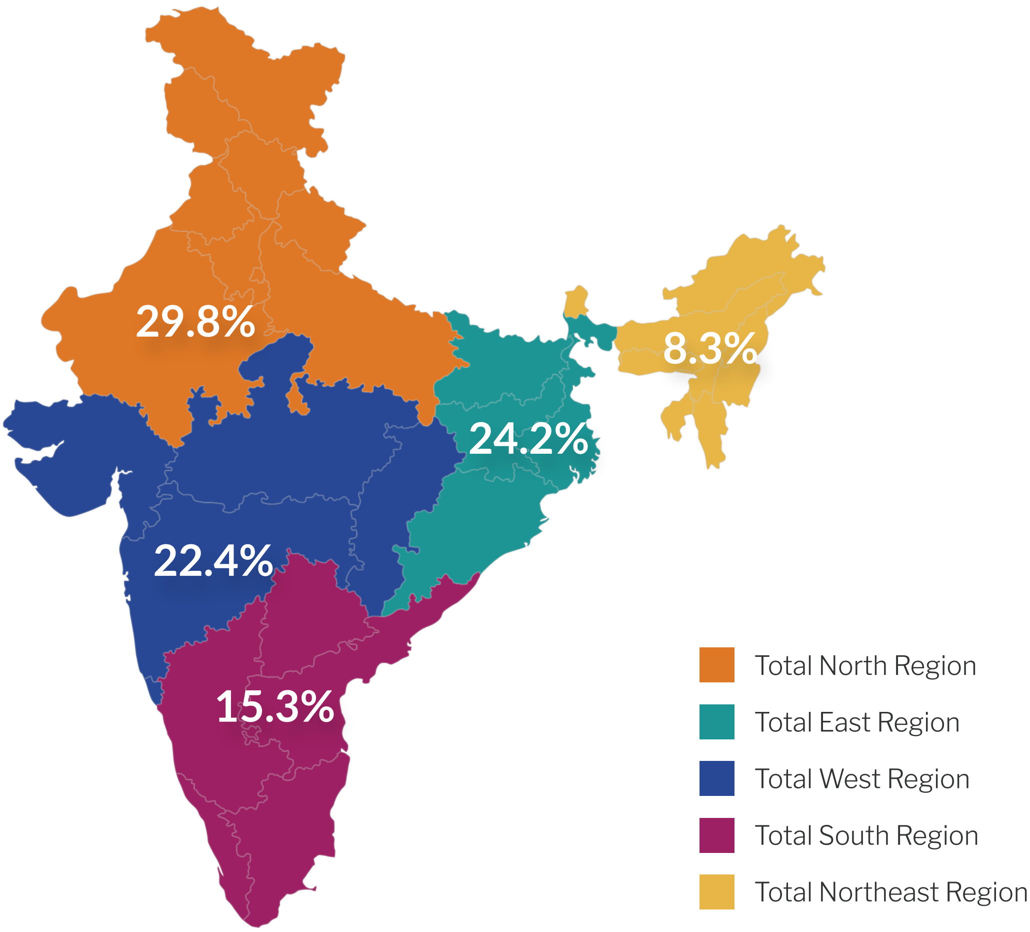


Figure 4. Zone wise contribution to Direct selling Industry sales in FY 2023-2024

Indian Direct Selling Sales and Number of Active Direct Sellers: State-wise (FY 2023-2024)

State & Union Territory	Direct Selling Sales (INR Crore)	Share in Indian Direct Selling Sales	Number of Active Direct Sellers (Lakhs)
Uttar Pradesh	2,214	10.0%	14.9
Haryana	1,041	4.7%	2.0
New Delhi	996	4.5%	1.5
Rajasthan	775	3.5%	3.0
Punjab	686	3.1%	1.7
Uttarakhand	443	2.0%	1.2
Jammu & Kashmir	244	1.1%	0.9
Chandigarh	112	0.5%	0.1
Himachal Pradesh	89	0.4%	0.7
Total North Region	**6,600**	**29.8%**	**26**
West Bengal	2,502	11.3%	7.0
Bihar	1,373	6.2%	15.1
Odisha	1,107	5.0%	4.0
Jharkhand	376	1.7%	4.0
Total East Region	**5,358**	**24.2%**	**30.1**
Maharashtra	2,879	13.0%	9.5
Gujarat	952	4.3%	2.0
Madhya Pradesh	620	2.8%	4.5
Chhattisgarh	443	2.1%	3.9
Goa	50	0.2%	0.1
Dadra & Nagar Haveli	5	0.0%	0.1
Total West Region	**4,949**	**22.4%**	**20.1**
Karnataka	1,262	5.7%	1.8
Tamil Nadu	709	3.2%	1.8
Kerala	501	2.3%	1.3
Telangana	554	2.4%	1.2
Andhra Pradesh	310	1.4%	1.0
Pondicherry	40	0.2%	0.1
Andaman and Nicobar Islands	17	0.1%	0.4
Total South Region	**3,393**	**15.3%**	**7.6**
Assam	997	4.5%	2.3
Manipur	221	1.0%	0.3
Nagaland	221	1.0%	0.4
Mizoram	155	0.7%	0.4
Arunachal Pradesh	107	0.5%	0.2
Tripura	112	0.5%	0.3
Meghalaya	21	0.1%	0.2
Sikkim	8	0.0%	0.1
Total Northeast Region	**1,842**	**8.3%**	**4.2**
Total India	**22,142**	**100.0%**	**88**

Table 1. State wise direct selling sales (in INR crore) and number of active direct sellers (in lakhs).

Top 10 states contributing to Direct Selling turnover

In **FY 2023-24, Maharashtra, West Bengal, Uttar Pradesh, Bihar, Karnataka, Odisha, Haryana, New Delhi, Assam,** and **Gujarat** emerged as the **top 10 states** contributing to the Indian direct-selling industry's sales turnover. Collectively, these states accounted for **69.2%** of the total industry revenue, highlighting their dominant role in driving direct-selling growth nationwide.

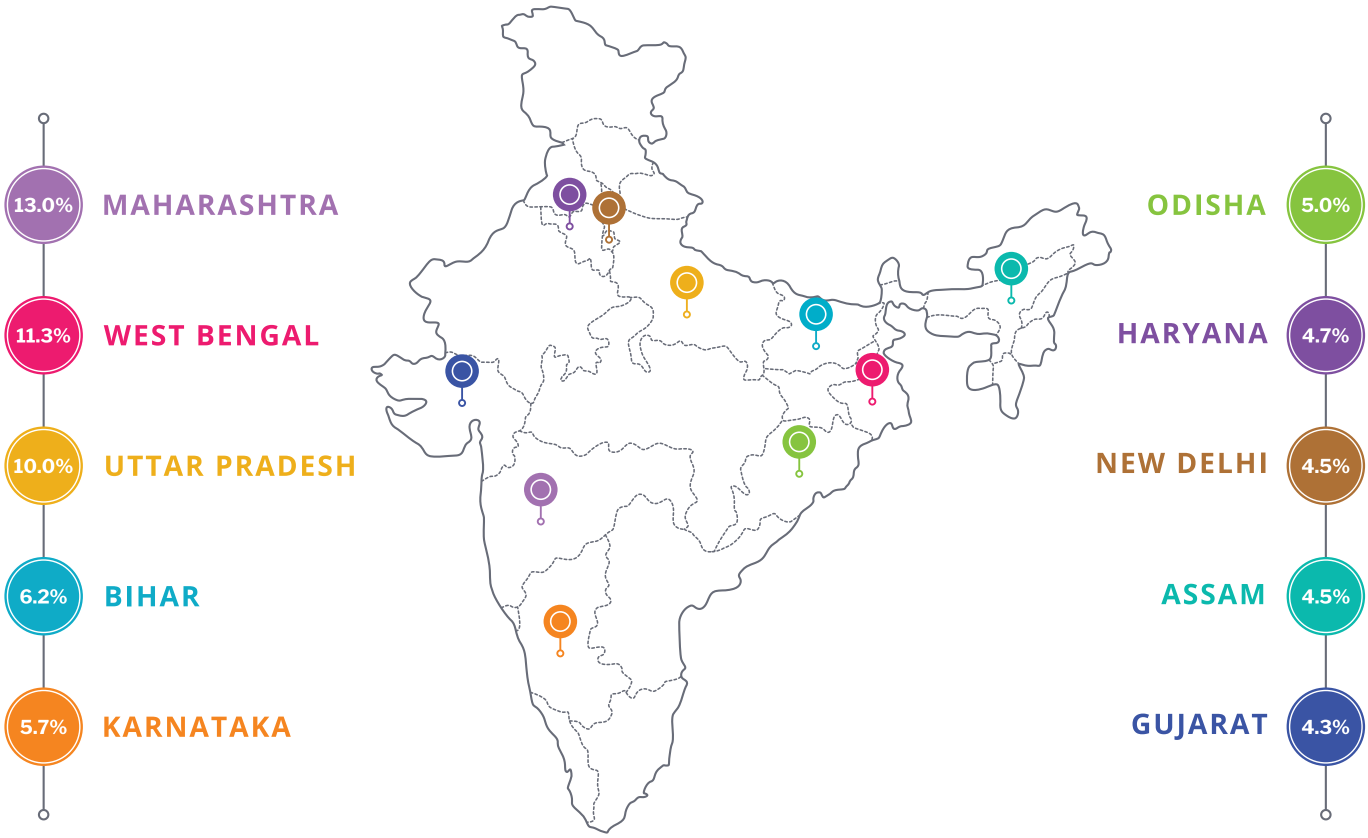


Figure 5. State wise contribution to Direct selling Industry sales across the top 10 states in FY 2023-2024

Indian Direct Selling sales - North region

Uttar Pradesh emerged as the **largest contributor** to direct-selling sales in the Northern region, accounting for **33.6%** of the total turnover. It was followed by **Haryana** at **15.8%**, while **Delhi** and **Rajasthan** contributed **15.1%** and **11.7%**, respectively.

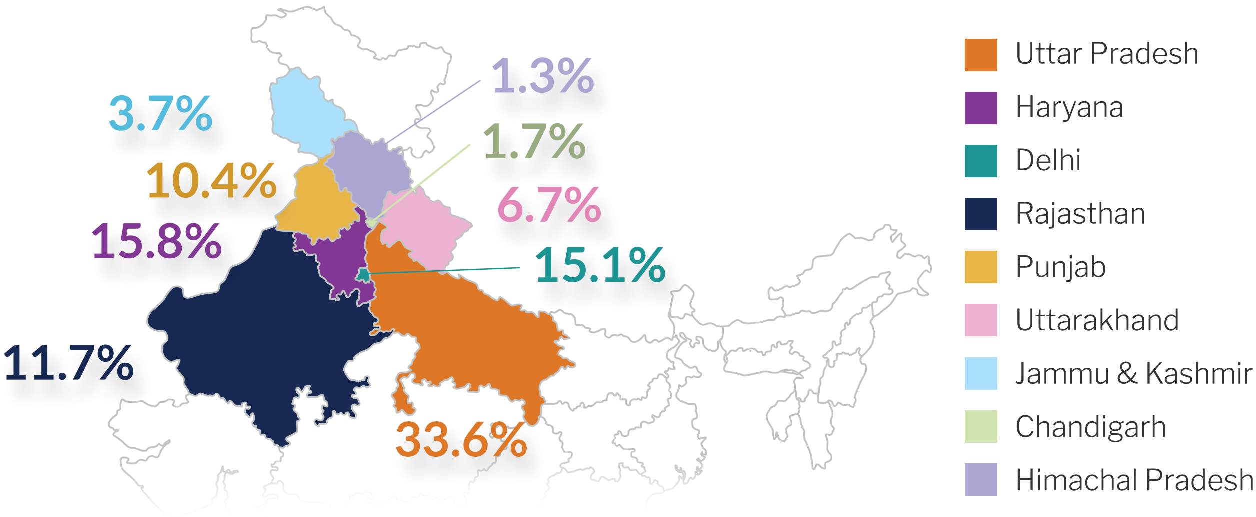


Figure 6. Contribution of states in the Northern region to Direct selling Industry sales in FY 2023-2024

Indian Direct Selling sales - East region

Within the **Eastern region, West Bengal dominated direct-selling sales**, capturing **46.7%** of the market share, followed by **Bihar at 25.6%, Odisha at 20.7%,** and **Jharkhand at 7%**.

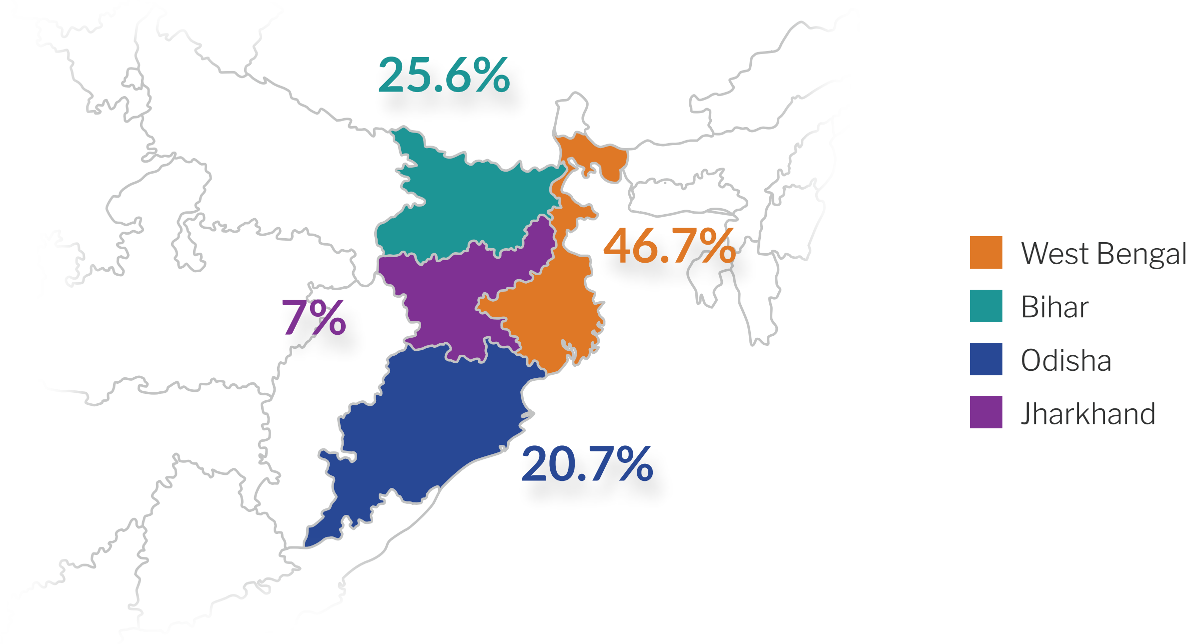


Figure 7. Contribution of states in the Eastern region to Direct selling Industry sales in FY 2023-2024

Indian Direct Selling sales - West region

In the Western region, Maharashtra emerged as the top contributor to direct-selling sales, capturing **58.2%** of the total Western region share. **Gujarat ranked second with 19.2%**, followed by **Madhya Pradesh at 12.5%** and **Chhattisgarh at 9%**.

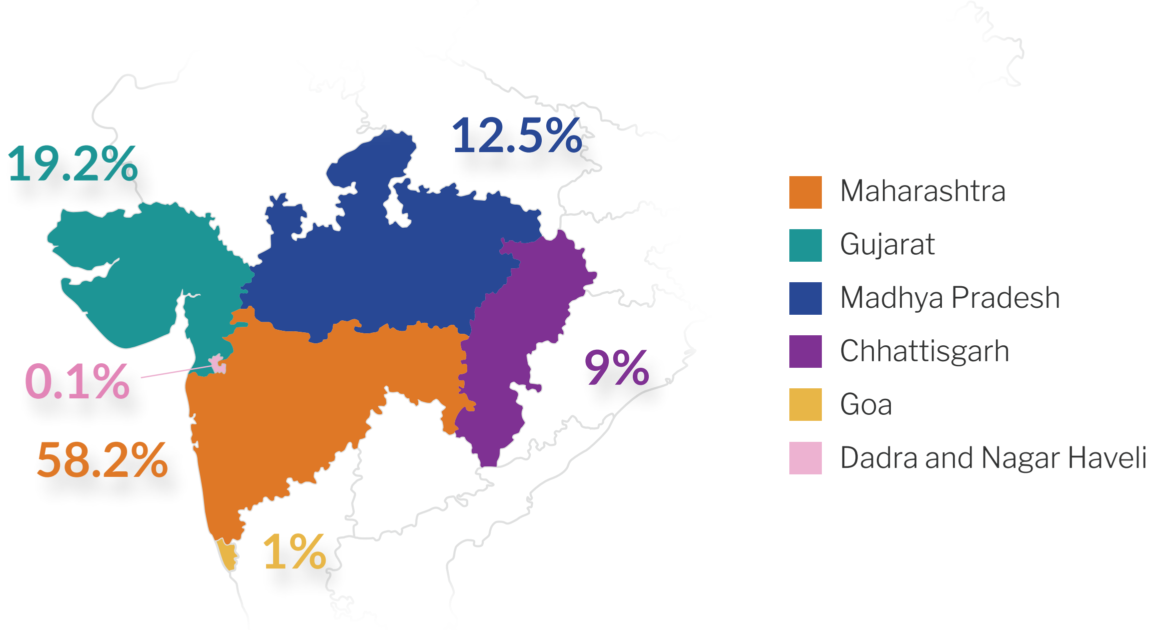


Figure 8. Contribution of states in the Western region to Direct selling Industry sales in FY 2023-2024





Indian Direct Selling sales - South region

A triumvirate of **Karnataka (37.2%), Tamil Nadu (20.9%), and Telangana (16.3%)** dominated **Southern region** direct selling, capturing a combined **74.4%** of South sales.

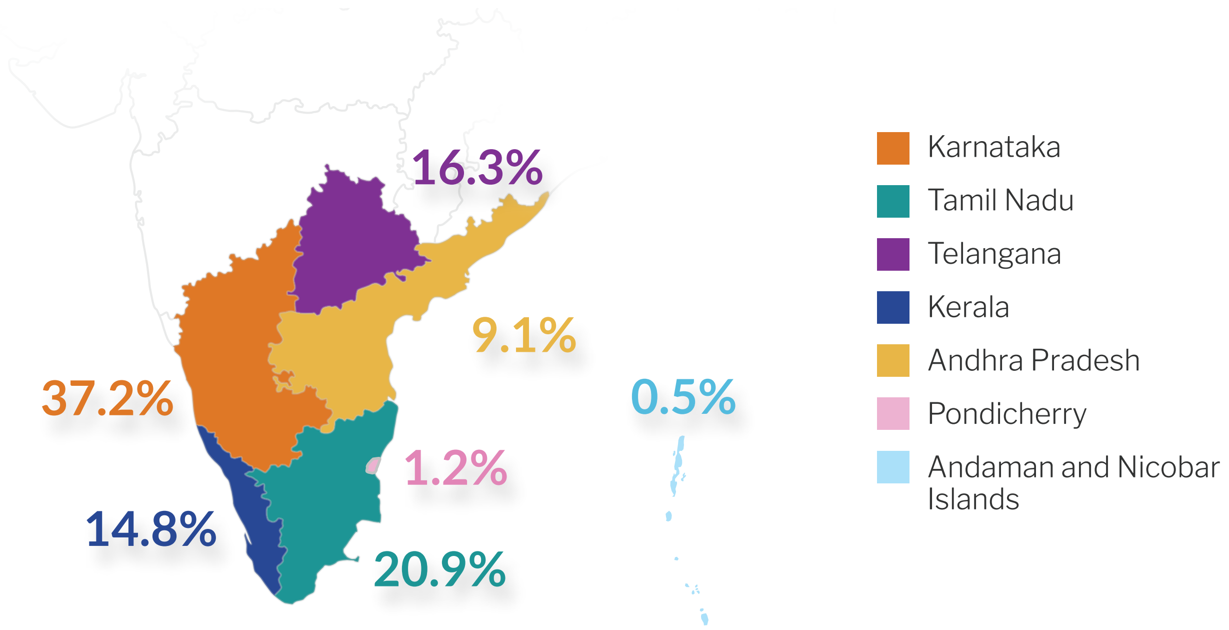


Figure 9. Contribution of states in the Southern region to Direct selling Industry sales in FY 2023-2024





Indian Direct Selling sales - Northeast Region

In **Northeast India, Assam** emerged as the top contributor to **direct selling sales** with **54.1%**, followed by **Manipur (12.1%)** and **Nagaland (12%)**.

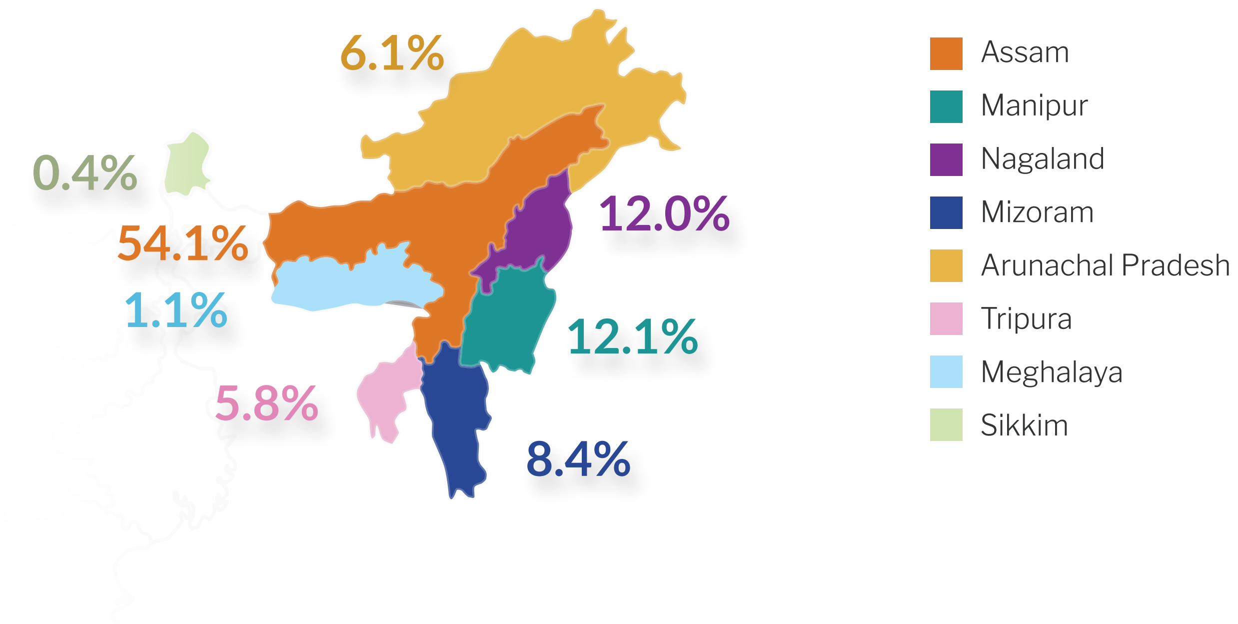
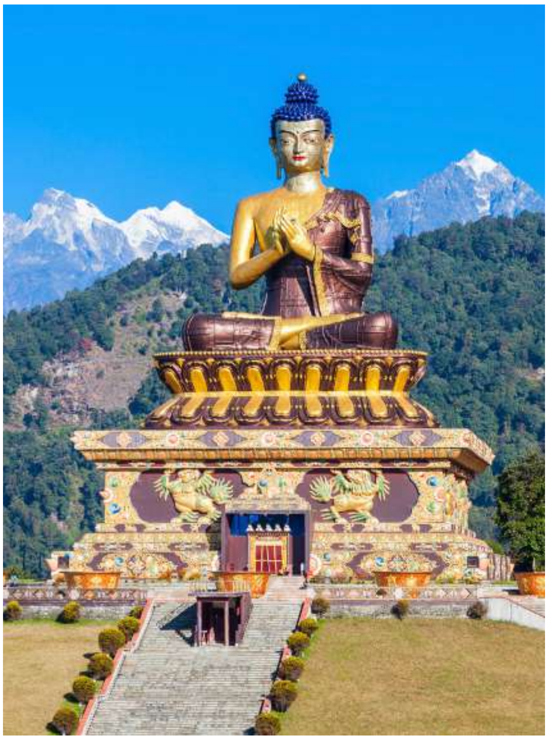


Figure 10. Contribution of states in the North-eastern region to Direct selling Industry sales in FY 2023-2024



Number of Active Direct Sellers in India from FY 2019-20 to FY 2023-2024

India's direct selling industry continued its **gradual expansion**, with the count of **active direct sellers** rising from **86.2 lakh** in **FY 2022-23** to **88 lakh** in **FY 2023-24**, marking a **2.2% Y-o-Y growth**.

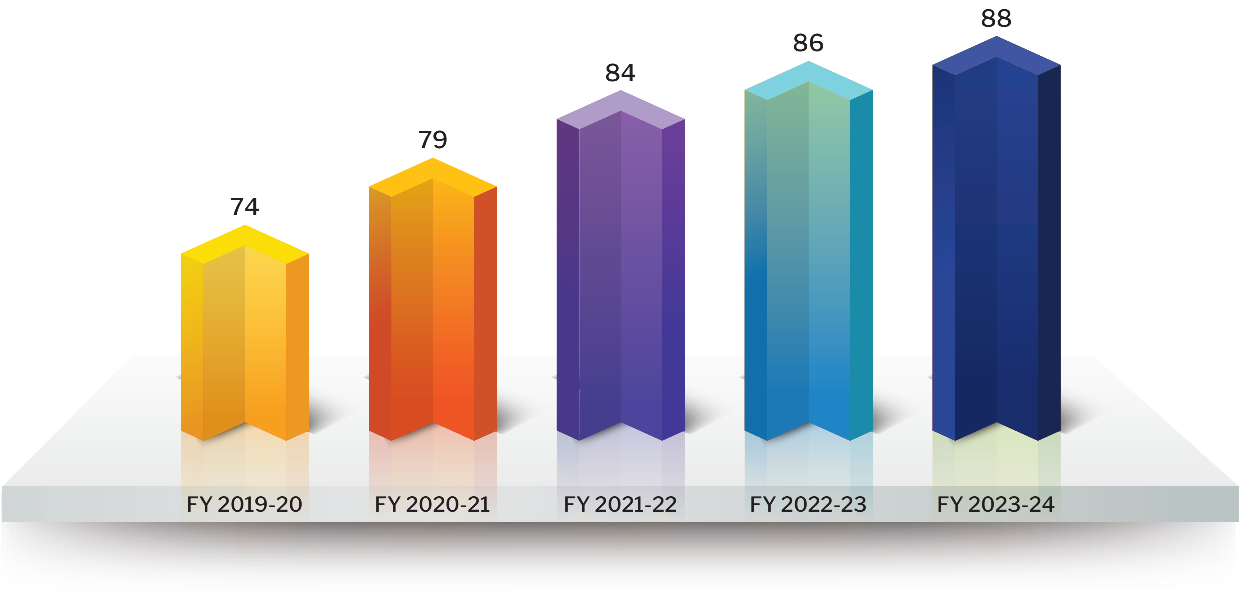


Figure 11. Total number of active direct sellers in India (in lakhs) from FY 2019-20 to FY 2023-2024

Gender split of the Active Direct Sellers in India

As of FY 2023-24, the active direct seller population in India is distributed as **56% men and 44% women.**

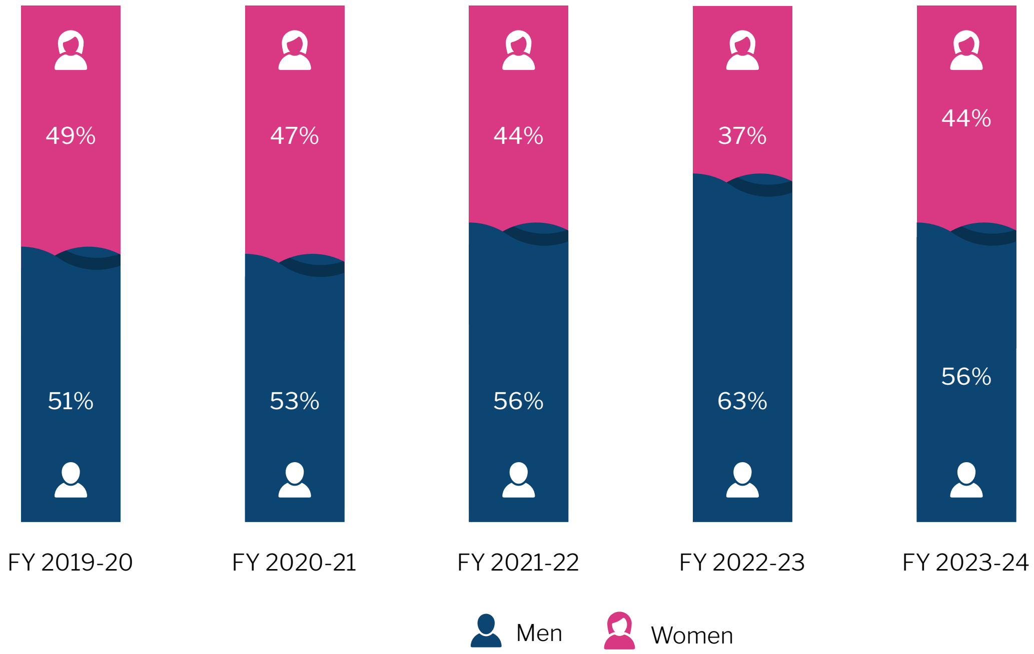


Figure 12. Gender split of the Active Direct Sellers in India

Age-wise split of Active Direct Sellers in India

Among the **88-lakh active direct sellers**, the **largest share (73.2%) belonged to the 25–54** age group. Meanwhile, **younger participants (18–24 years) formed 15.2%**, and **seniors (54+) accounted for 11.6%**, highlighting a broad generational presence in the industry.

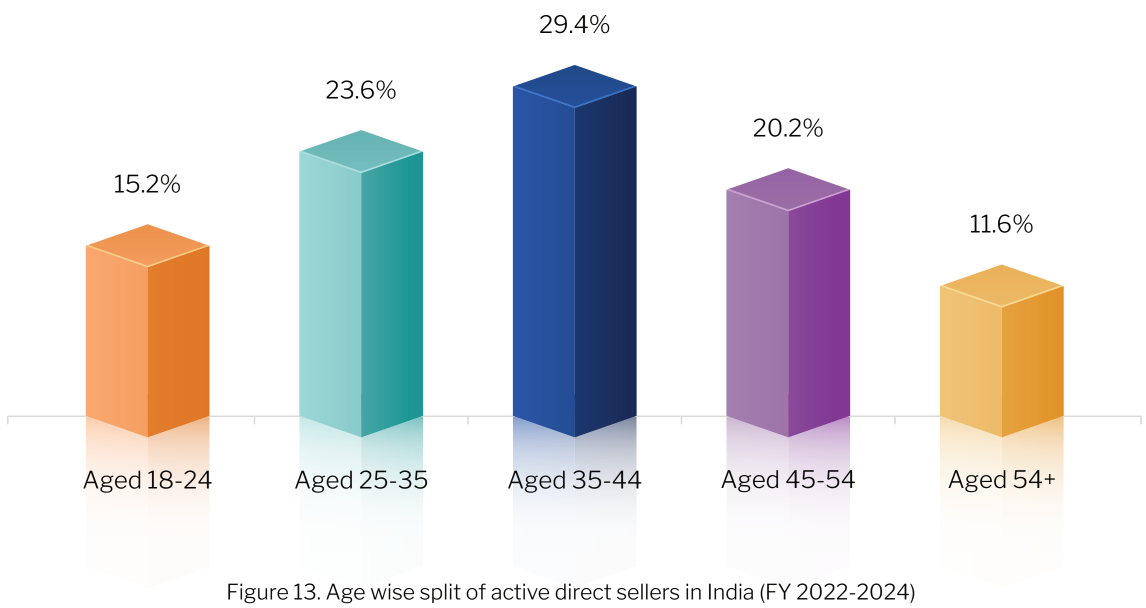


Figure 13. Age wise split of active direct sellers in India (FY 2022-2024)

Key Insights From **Direct Sellers Survey**

Context

The Direct Sellers Survey FY 2024 aimed to develop a holistic understanding of Direct Sellers' backgrounds, business practices, and the economic and social impact of their participation in the industry.

The survey explored various aspects, including the **most sold product categories over the past year** and those with **future potential**. It examined the **channels** through which Direct Sellers were introduced to the industry and the **key drivers motivating their continued engagement**. The study also analyzed the **sales channels** they use, the **duration** of their association with the industry, and their **overall experience**. Additionally, respondents shared insights on the percentage of their total sales generated from different customer age groups.

The study also explored **key challenges** within the industry that affect Direct Sellers' business and livelihood. Additionally, it **assessed their awareness of the rules and regulations** they are required to follow as direct sellers.

Key Findings - Direct Sellers Survey

01

Direct selling is seen as a sustainable, long-term livelihood option

A significant **71%** of **direct sellers** have stayed in the **industry for over five years**, signaling **strong retention** and **long-term engagement**. Moreover, with **62% identifying it as their primary source of income, direct selling** has moved beyond being a **side hustle**—emerging as a **mainstay livelihood** for many. This underscores the **ability to provide sustained economic value**, especially for those seeking **flexible yet stable self-employment opportunities**.

02

Desire for self-employment drives entry—personal ambition sustains engagement

While majority of the respondents joined to be **self-employed**, ongoing participation is powered by **deeper aspirations of personal growth and entrepreneurial fulfillment as key motivators**. The model appeals not just for income, but for the **autonomy** and **self-development it offers**.

03

Health and beauty are the industry's future growth engines

Wellness (health & nutrition) and **Cosmetics & Personal Care** are not just **popular categories**—they are seen as the **strongest growth areas** by sellers. **High repurchase intent** and **consumer satisfaction** in these categories indicate a **robust perception of product quality and value**.

04

Digital platforms are accelerating outreach, but in-person remains key

While **54% still rely on face-to-face selling, WhatsApp and social media** are fast becoming **essential tools**. This signals a **hybrid evolution**—where **digital augmentation** enhances, but does not replace, **personal engagement**.

05

Growth strategies - Expanding into Tier 2 and Tier 3

This expansion presents a **significant opportunity** to access a vast and **growing customer base**. These markets not only offer immense potential for business growth but also **enable deeper community engagement** and **brand loyalty through localized** outreach and presence.

Profile of the Respondents

Age group of Direct Sellers

Most direct sellers were aged **35-44 years (31%),** followed by **45-54 years (29%)** and **55 & above (21%).**

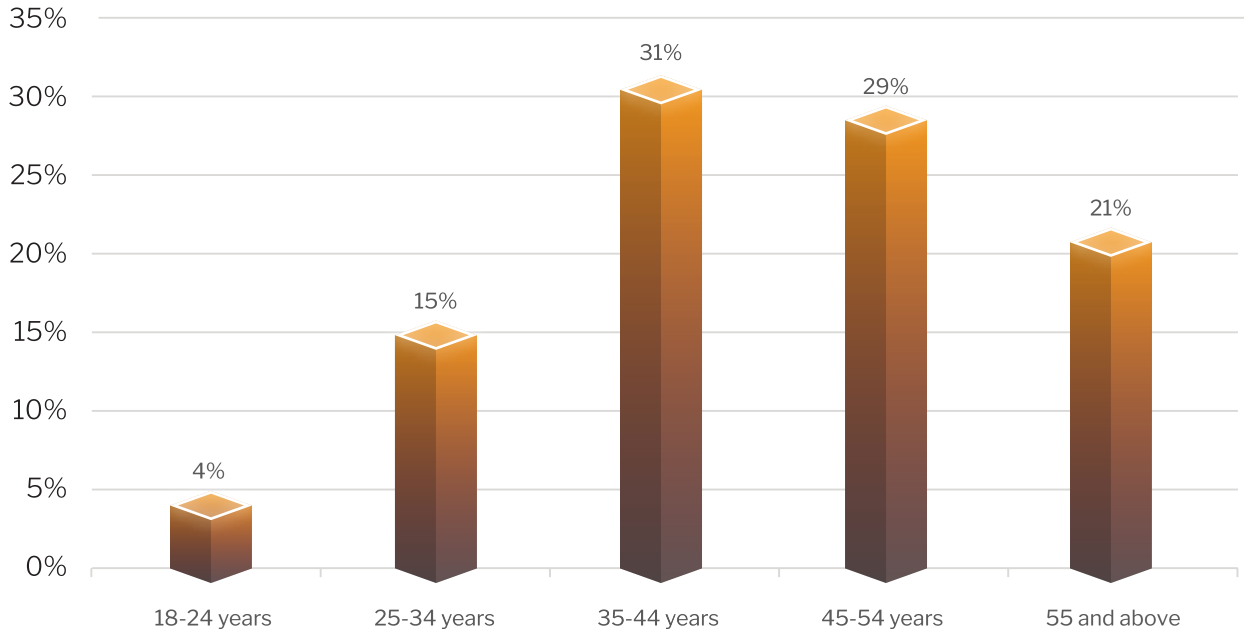


Figure 14. Age of respondents

Educational background of the Direct Sellers

78% of direct sellers have a graduate or postgraduate degree.

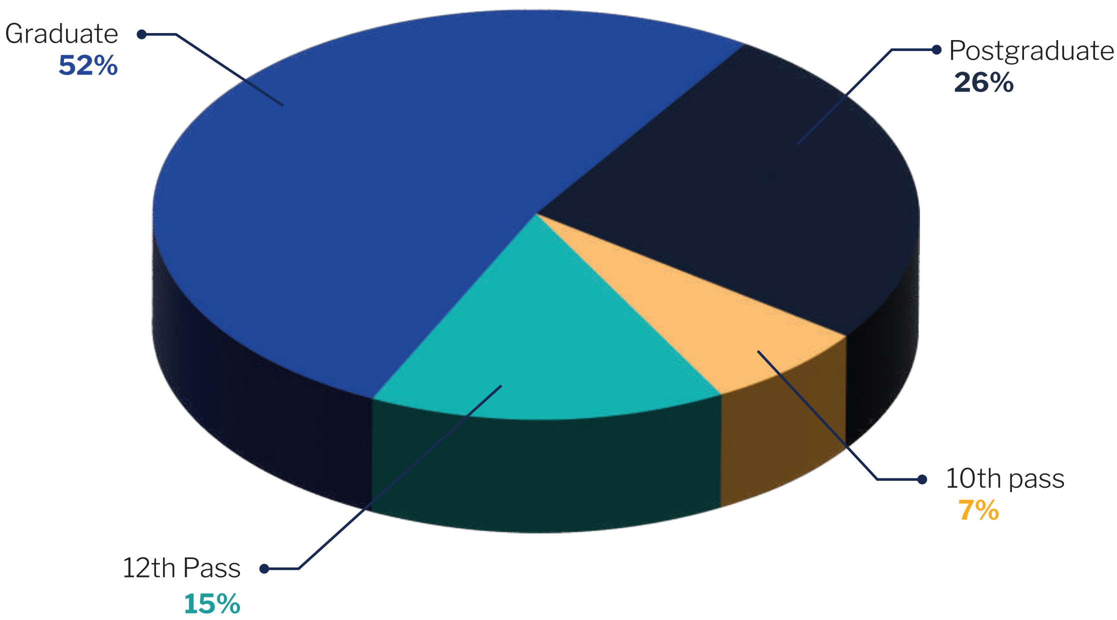


Figure 15. Education level of respondent

Profile of the respondents

Level of involvement in Direct Selling

62% of the direct sellers are fully committed to direct selling as their primary source of income, while 38% engage in it part-time alongside other activities or income sources.

Full-time involvement - I am fully committed to direct selling as my primary source of income.

Part-time involvement - I engage in direct selling alongside other activities or income sources.

Figure 16. Level of Engagement in Direct Selling

Experience in Direct Selling

Among the direct seller respondents, a significant **71%** have been active in the industry for over five years, reflecting long-term commitment.

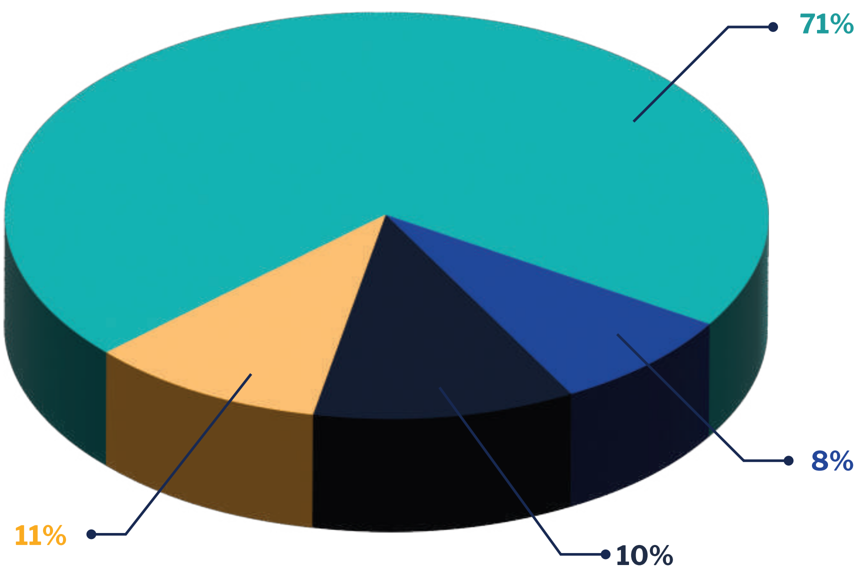
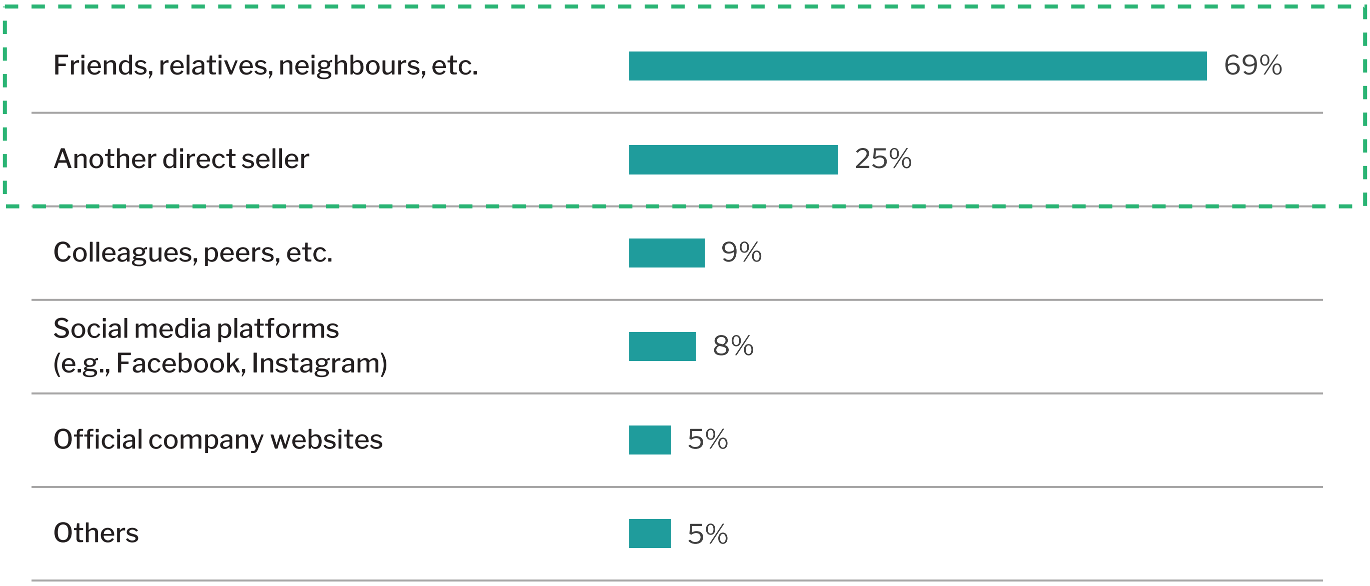


Figure 17. Experience in Direct Selling

Source of Awareness about Direct Selling

Word-of-mouth is the primary driver of direct selling awareness, with 69% learning from friends, relatives, or neighbors, and 25% from other direct sellers. In contrast, digital channels such as social media platforms (8%) and official company websites (5%) play a relatively limited role in driving awareness.

This indicates a strong internal referral system and suggests that direct sellers are effective ambassadors for the industry.



Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 18. Sources of Awareness

Evaluating the Direct Sellers Experience across the Direct Selling Industry

The evaluation of direct sellers' experience highlights **product quality** as a **consistent strength**, earning strong satisfaction across the board. **Training programs** are also **positively received**, reinforcing their value in the overall experience. However, **product pricing** receives more varied feedback compared to other aspects, highlighting an **opportunity for further evaluation** and **potential enhancement**.

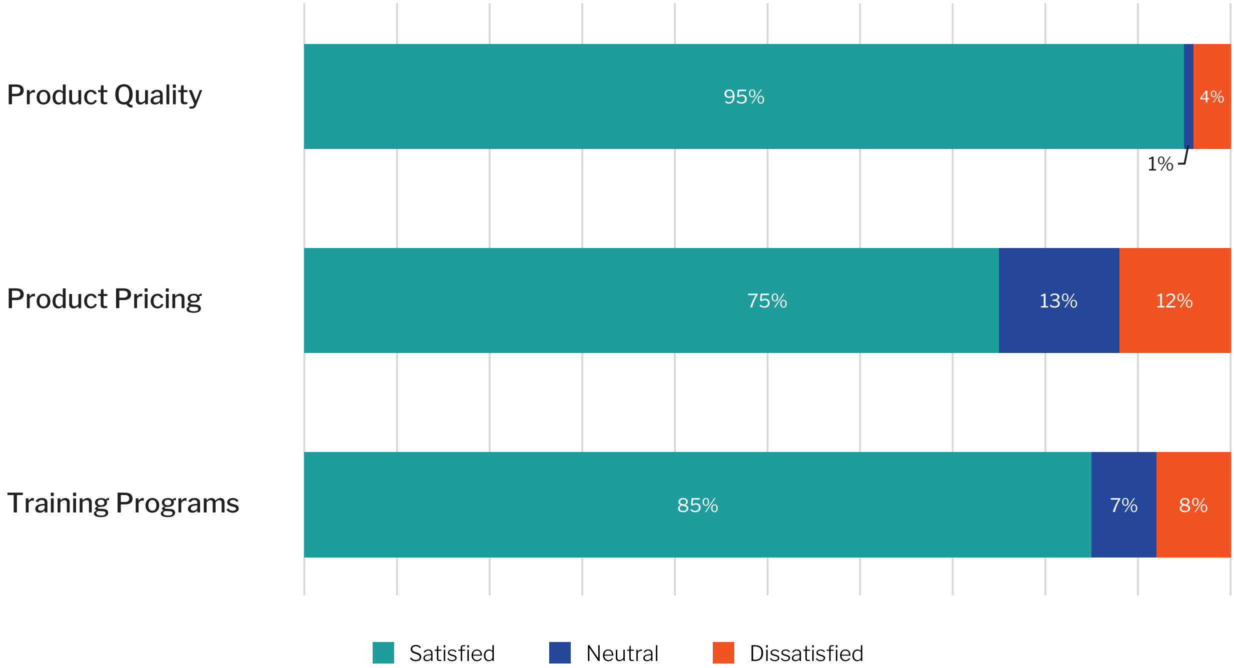


Figure 19. Evaluation of Direct Seller Experience - Industry-Wide View

Most important reason for becoming a Direct Seller

Self-employment opportunities (50%) and **additional income potential (21%)** are the top reasons for joining direct selling, together making up 71% of responses. This indicates that economic factors are the most significant drivers for becoming a direct seller.

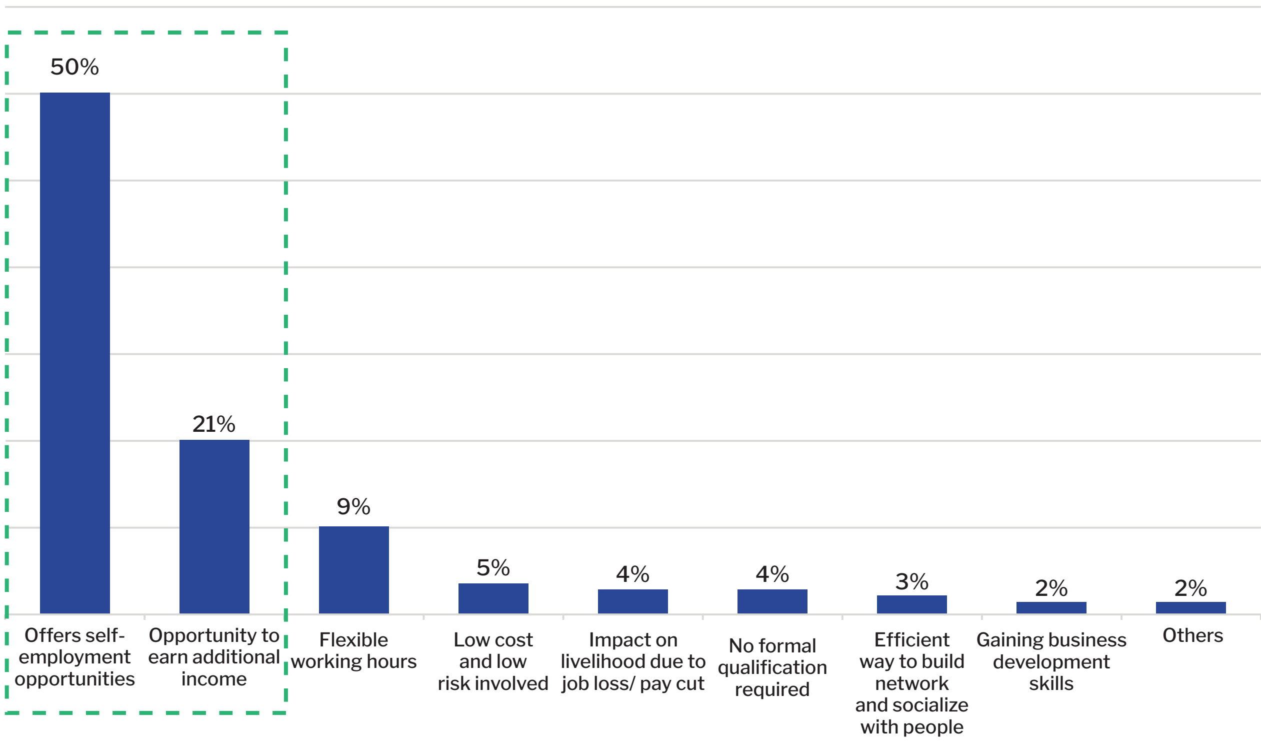


Figure 20. Most important reason for becoming a Direct Seller

Primary Sales Channels Used by Direct Sellers to Drive Sales

In-home demonstrations remain the most prevalent sales channel for direct sellers, with 54% utilizing this method. This underscores the **continued importance of personal interaction and product demonstrations** in driving sales within the direct selling model. However, **digital platforms are increasingly playing a role**, with 17% leveraging social media (Facebook, Instagram, etc.) and 15% utilizing WhatsApp and messaging apps for sales.

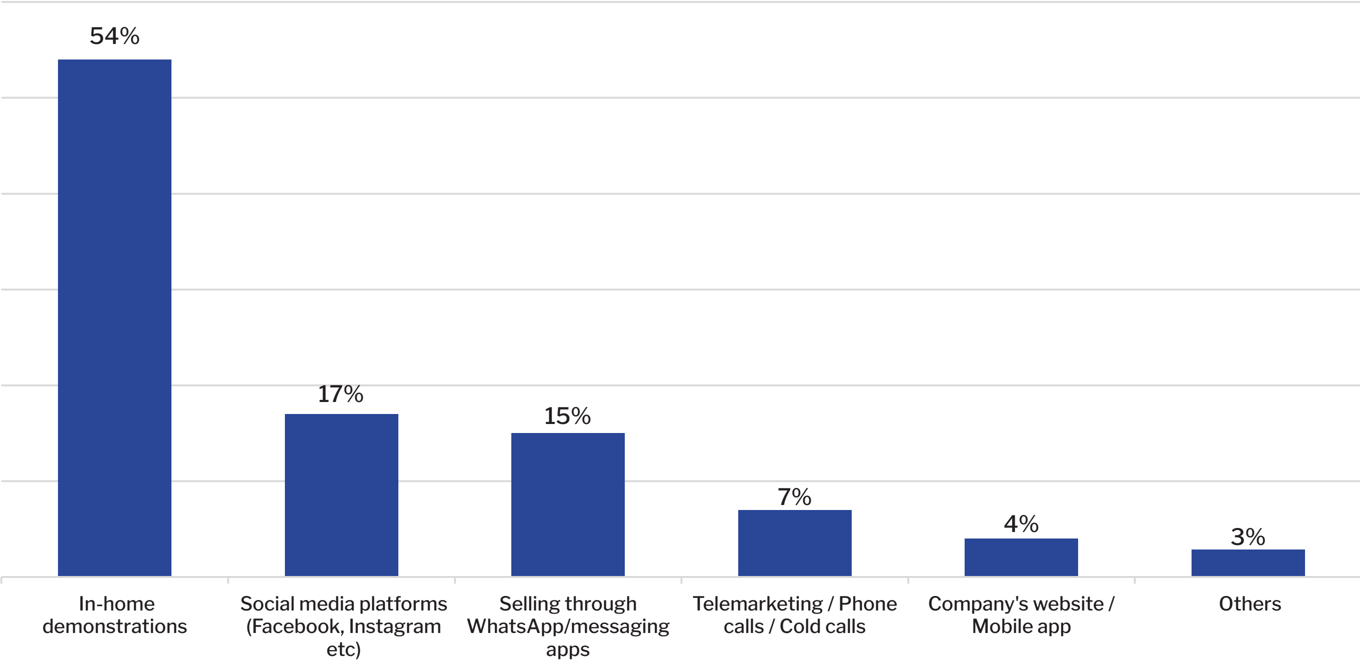


Figure 21. Primary Sales Channels Utilized by Direct Sellers

Primary Digital Platforms Used for Direct Selling

The strong preference for WhatsApp (80%) highlights the importance of direct communication and personalized sales within digital direct selling.

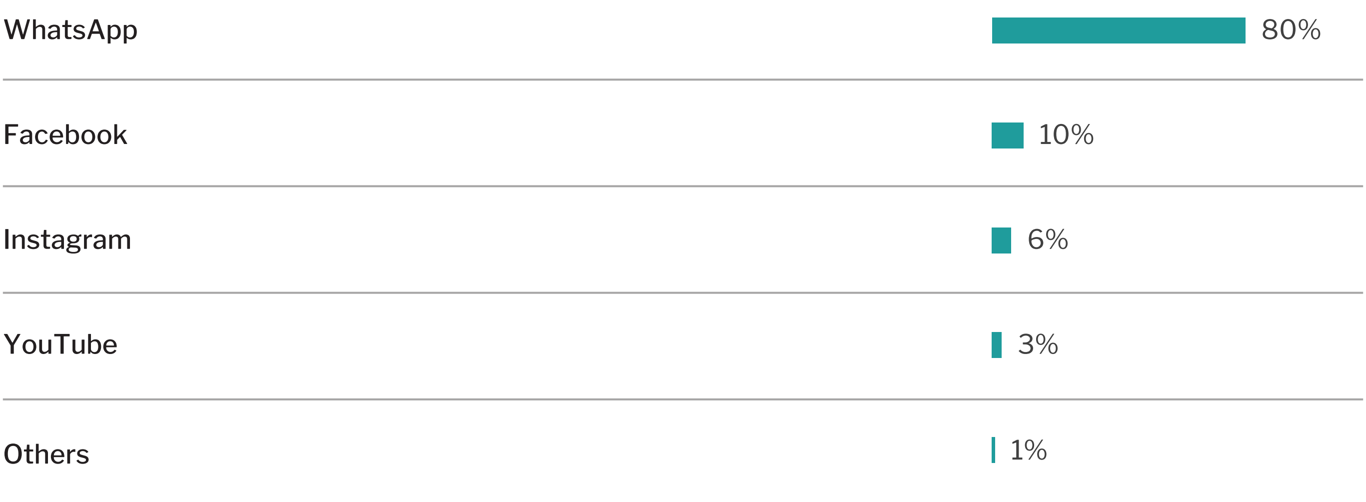
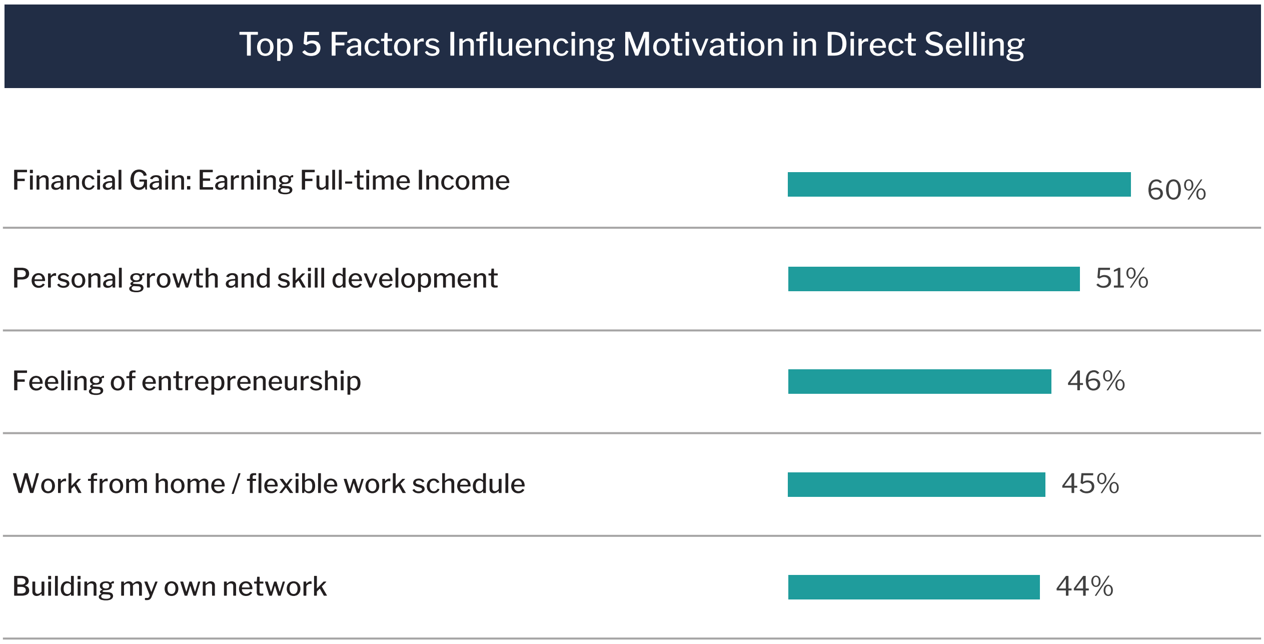


Figure 22. Primary Digital Platforms Use for Direct Selling

What Drives Direct Sellers to Stay Engaged?

Financial stability is the primary motivation for direct sellers, with **60% citing full-time income as a key factor for continued engagement**. However, beyond financial gains, **personal and professional growth also play a crucial role - 51%** seek skill development, while **46% are driven by the entrepreneurial aspect** of direct selling.



Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 23. Factors Influencing Motivation in Direct Selling

Impact of Digital Influence on Direct Selling Business

72% of direct sellers report that social media and influencer marketing have **positively impacted their business.**

Impact of Social Media and Influencer Marketing on Direct Selling Business

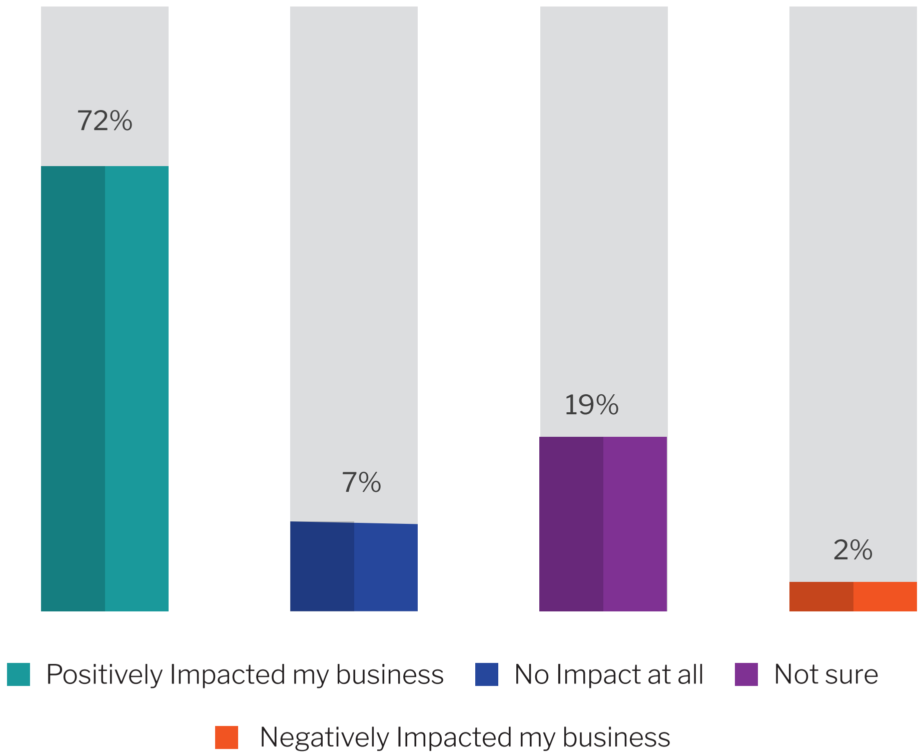
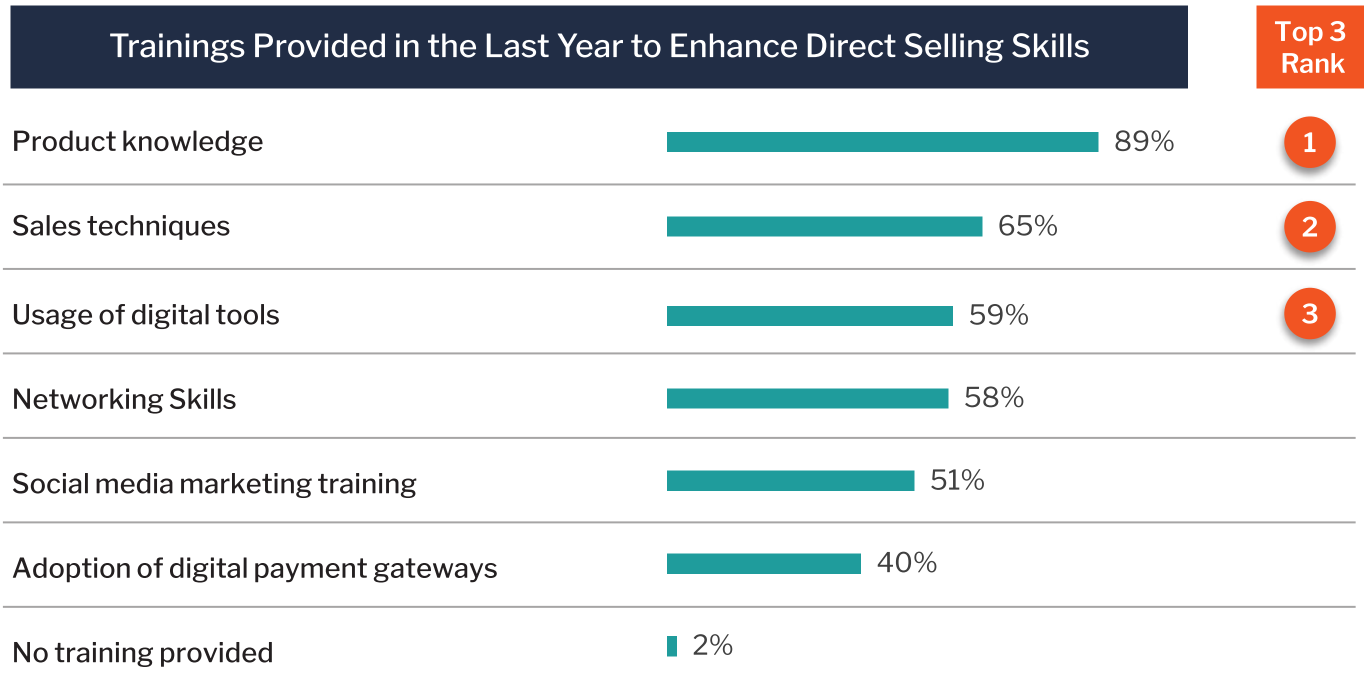


Figure 24. Social Media and Influencer Marketing Impact (Direct Selling)

Direct Seller Perspectives on Growth Strategies

Direct Sellers believe that **focusing on health and wellness products (46%) is the most effective strategy** for driving growth in the industry. **Expansion into Tier 2 and Tier 3 cities (22%)** is also seen as a major opportunity to reach new customers.

Figure 25. Direct Seller Perspectives on Growth Strategies



Product knowledge and **sales techniques** are the most commonly provided trainings for direct sellers.

Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 26. Trainings Provided in the Last Year

Awareness of Government-Laid Direct Selling Rules

62% of direct sellers believe they are aware of government-laid rules, while 28% have partial knowledge and 10% are unaware, underscoring the need for better education.

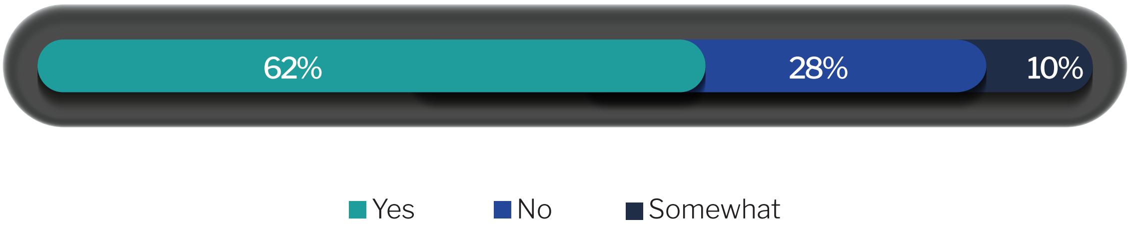


Figure 27. Awareness of Government-Laid Direct Selling Rules

Insights From Consumer **Awareness Survey**

Consumer Awareness Survey 2024

Context

The **Consumer Awareness Survey FY 2024** was conducted through a mix of **Face-to-Face (F2F) interviews** and **Online surveys.** F2F interviews took place at high-footfall locations such as shopping malls, markets, and commercial hubs to capture diverse consumer perspectives.

The study covered Tier 1 and Tier 2 cities, ensuring balanced regional representation, including **Mumbai (16%), Delhi (16%), Kolkata (16%), Bangalore (15%), Surat (10%), Jaipur (9%), Lucknow (9%), and Kochi (9%).** It also maintained **gender diversity**, with **50% women, 45% men, 3% transgender, and 2% preferring not to disclose their gender.**

Responses were analyzed by **gender and city** to uncover nuanced insights into consumer behavior and preferences.

The survey gathered insights into respondents' **educational and professional backgrounds,** their experiences with **Direct Selling products**. It also explored **sources of awareness and preferred buying channels**.

A key focus of the survey was to gauge **consumer trust** in the **Direct Selling industry**, factors influencing **purchase decisions,** and concerns about buying **Direct Selling products**. Respondents also provided insights on how the industry can **enhance awareness and build greater trust among consumer**.

Note: A total of 1,019 respondents were surveyed

Key Findings - Consumer Awareness Survey

01

Familiarity with Direct Selling Industry grows with experience and engagement

Nearly **half of all consumers surveyed (49%)** report being **extremely familiar** with the **direct selling industry**—a figure that climbs among **women** and those associated with it for **3+ years**. The insight underscores the value of **sustained engagement** and **word-of-mouth influence** in strengthening **industry understanding** and **credibility** over time.

02

Trust and product quality are key determinants of consumer satisfaction

Consumers rated **trust in the company** and **product quality** as the most important **satisfaction factors**. However, aspects such as pricing received comparatively lower rating, pointing to clear opportunities for companies to **strengthen overall consumer experience**.

03

Personal networks and digital channels are the most influential awareness drivers for Consumers

Word-of-mouth remains the **leading channel**, with **67% of consumers** discovering **direct selling** through **friends and family**. **YouTube (63%)** and **social media (54%)** follow closely, underlining the **dual importance** of **personal trust** and **digital visibility** in influencing **purchase decisions**.

04

Strong repurchase intent signals brand stickiness and product trustworthiness

Among **direct selling product buyers, Seven in ten consumers** express likelihood to **repurchase** from **wellness (74%)** and **personal care (70%)** segments, reflecting **high satisfaction** and **loyalty** toward product **performance** and **perceived value**.

05

Consumer expectations are evolving—demanding affordability and service excellence

Lower product prices (52%), better customer service (49%), and **improved return/exchange policies (45%)** are the top areas where consumers seek **improvement.** This reflects **rising consumer expectations** shaped by modern **retail and e-commerce benchmarks.**

Profile of the Respondents

Age Group of Customers

Most respondents were **25-34 years (26%)**, followed by **19-24 years (22%)** and **35-44 years (20%)**. The **45-54 years** group accounted for **17%**, while **16-18 years** made up **9%**. Older age groups had lower representation.

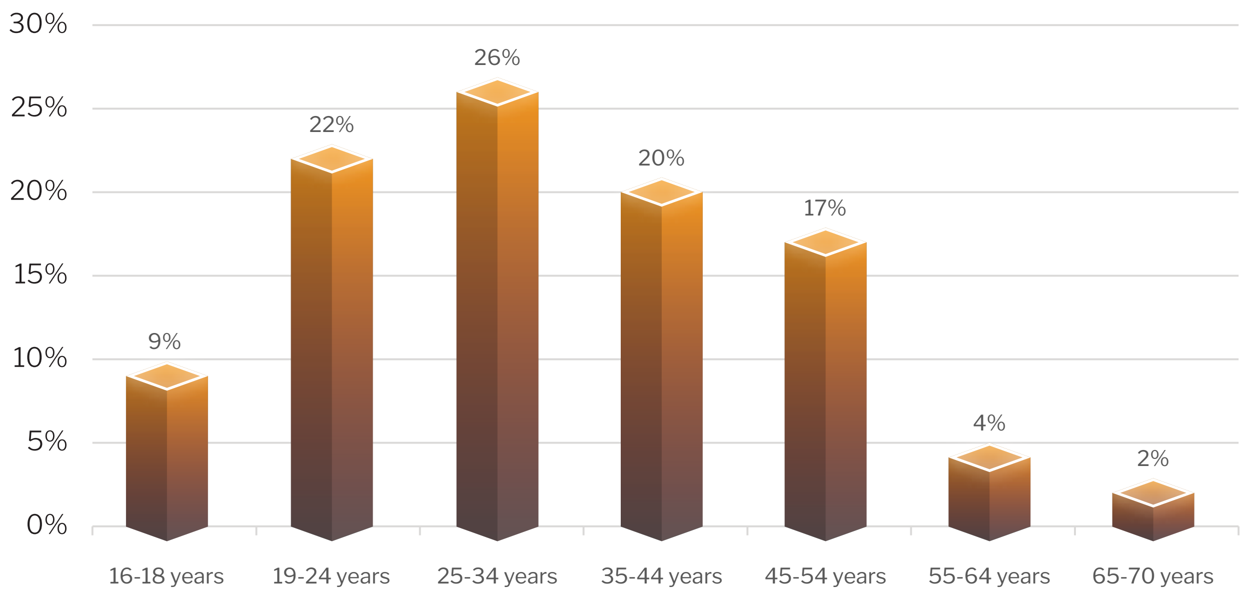


Figure 28. Age group of Customers

Educational Background of Consumers

Majority of the respondents surveyed were Graduates and Postgraduates, totalling 83%.

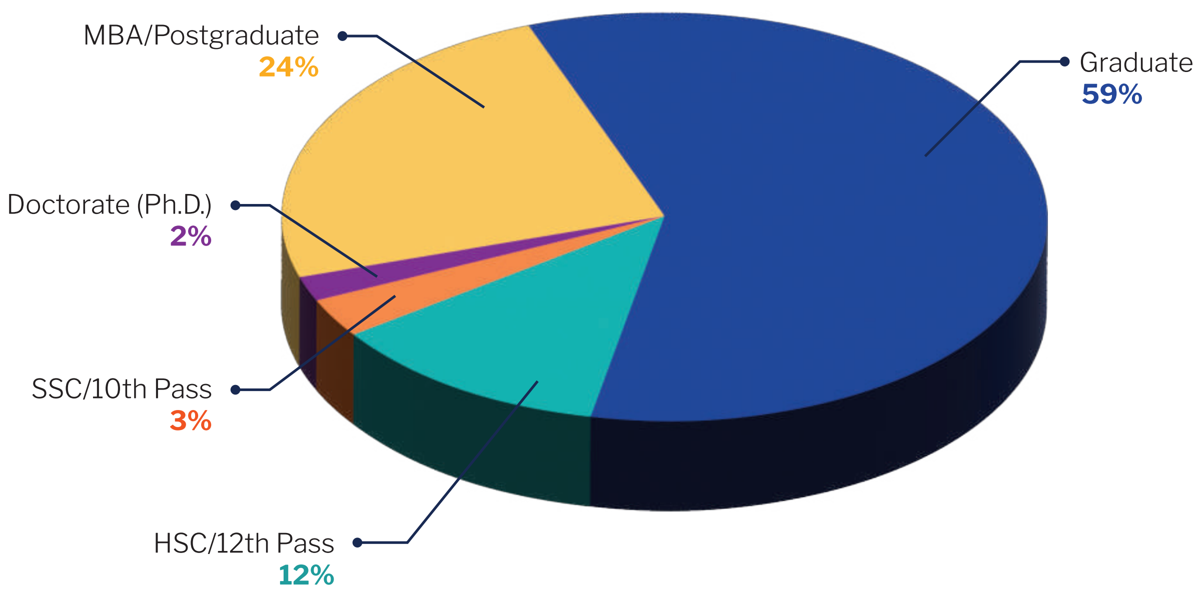


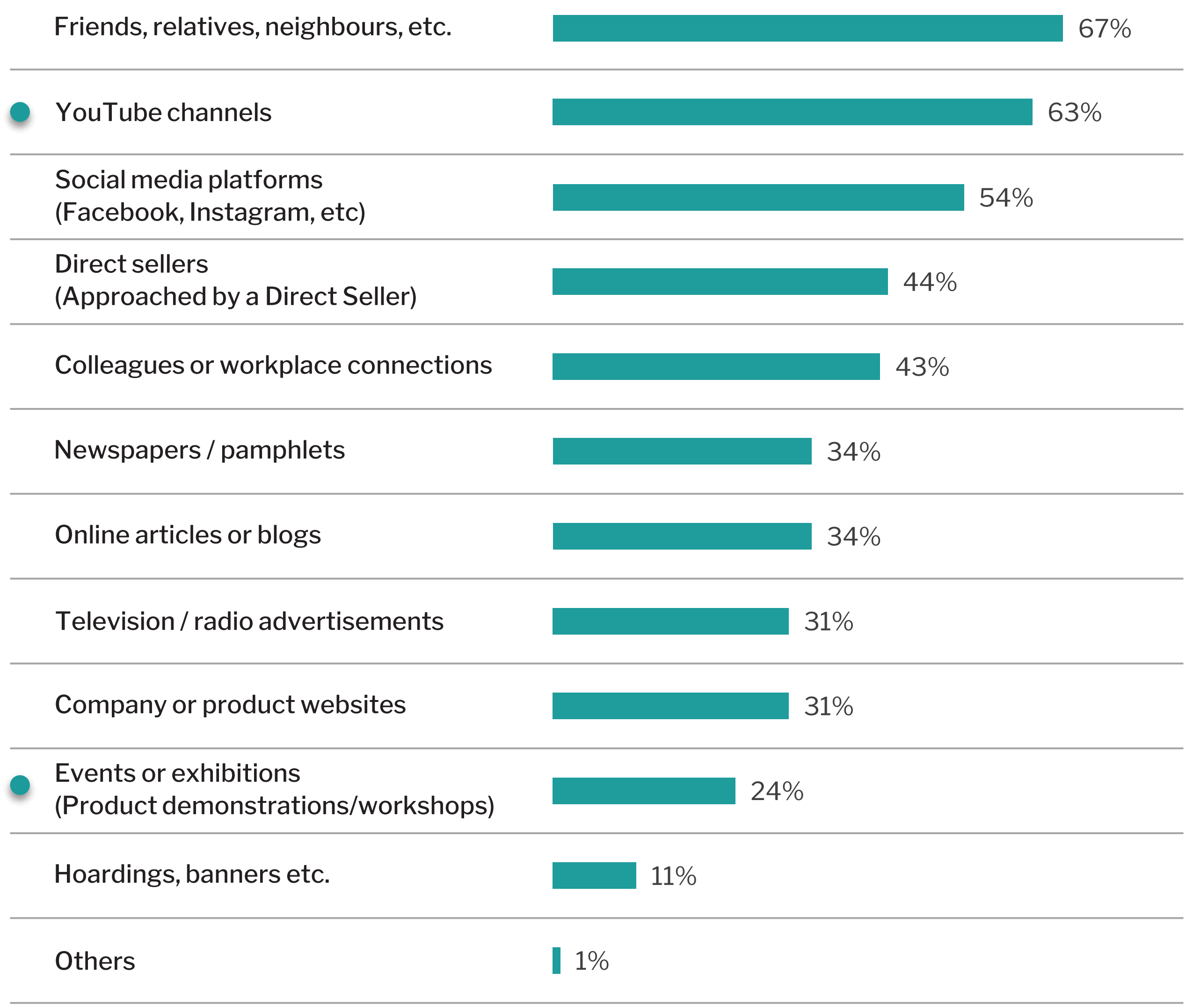
Figure 29. Education level of respondent

Source of Awareness about Direct Selling

Personal networks are the leading source of awareness for the direct selling industry, with 67% learning about it from friends, relatives, and neighbors.

Digital platforms are gaining prominence, with YouTube channels (63%) and social media platforms (54%) emerging as significant contributors.

Direct sellers remain a key source of awareness, with 44% of respondents learning about the industry through their outreach.



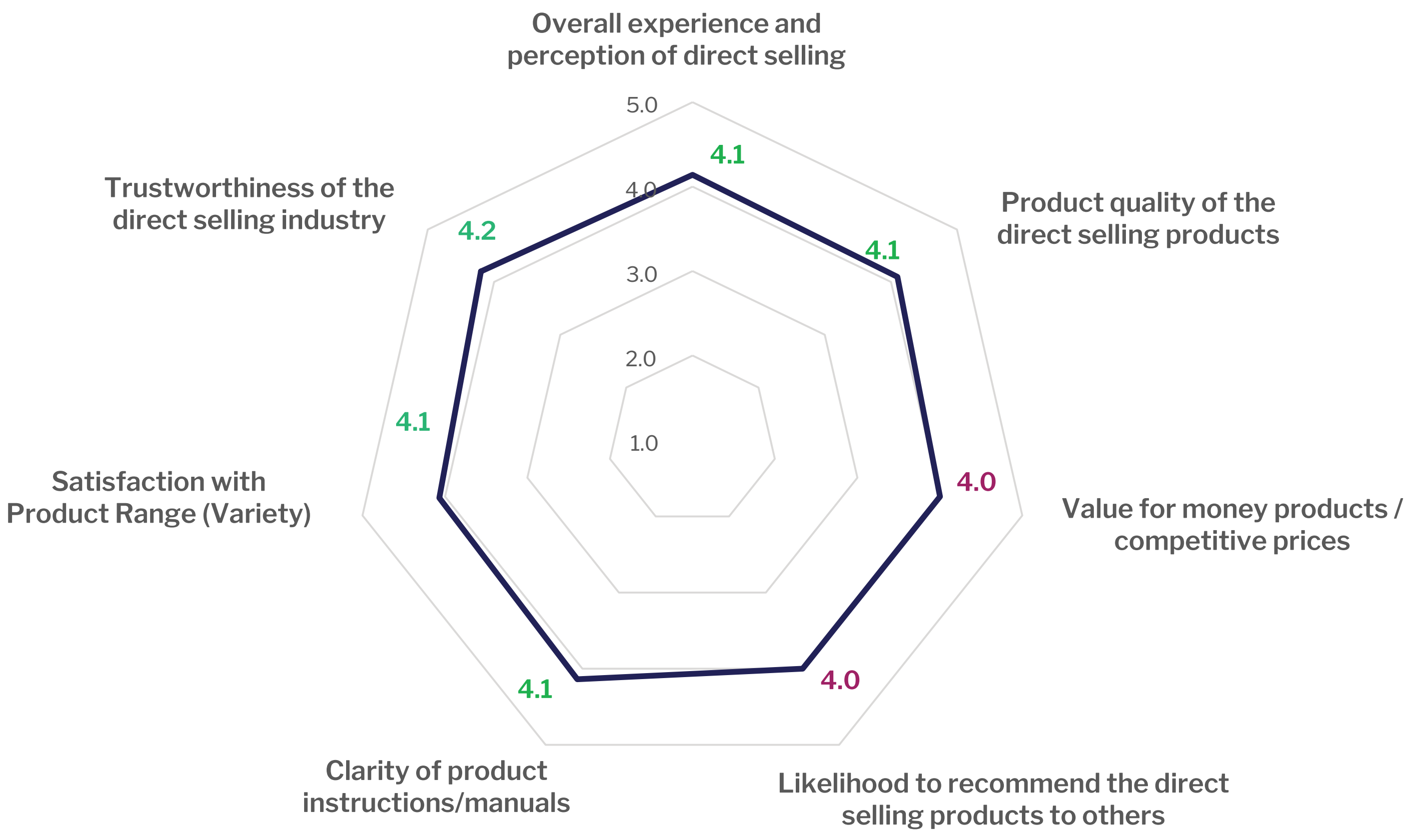
● = New parameter added in FY24

Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 30. Sources of Awareness

Perception Mapping of Consumers with Key Aspects of the Direct Selling Industry

Consumers demonstrate a positive overall perception of the direct selling industry, with consistently strong ratings across key experience parameters. While value for money and likelihood to recommend score slightly lower than other parameters, they still reflect a generally favorable consumer outlook. Focused efforts to further enhance competitive pricing and advocacy may help strengthen overall brand equity and drive deeper consumer engagement.



>=4.10	<3.9-4.10>	3.9=<

Indicative threshold based on Quartile Analysis

Note: Plotting is done basis mean scores on a 5-point scale

Figure 31. Perception Mapping on Key aspects of Direct Selling Industry

Consumer Perception: What Drives Trust on Direct Selling Industry

Trustworthiness and Product Quality are closely linked, reinforcing each other in the direct selling industry. Strong personal connections enhance trust, while high product quality drives customer retention, creating a sustainable consumer relationship.

Trustworthiness of the direct selling industry

“With verified sellers from industry, I find direct selling to be a trustworthy purchasing option”

“The seller's honesty, which emphasizes mutual interests, fosters a strong sense of trust between buyers and sellers”

“I appreciate the transparency and personal touch that direct selling offers”

“Purchasing directly from the company gives me confidence in the authenticity of the products, eliminating concerns about counterfeits”

'My long-term relationship with direct selling companies has consistently reinforced my trust in their ethical business practices”

Figure 32. Trustworthiness Rating of the Direct Selling Industry

Product Quality of the direct selling products

“Direct selling industry provides high quality of products. It focuses on customers”

“'I appreciate the consistency in high-quality products from direct sellers, which always meet my expectations”

“Most of the product I have tried from direct sellers has been reliable and performed superbly, which keeps me coming back”

“Purchasing from global brands ensures consistent, high-quality products, complemented by excellent packaging”

Figure 33. Consumer Perceptions of Direct Selling Product Quality

Top 5 reasons among customers for purchasing products from Direct Sellers

While product quality remains the leading driver for direct selling purchases, its dominance is experiencing a subtle shift. Consumers are increasingly valuing a holistic proposition that encompasses not only quality but also established brand reputation, reasonable pricing and packaging. This indicates an evolving consumer landscape where value extends beyond mere product excellence.

Women prioritize quick delivery, while men place greater emphasis on refund and money-back policies, highlighting distinct expectations in the purchasing journey.

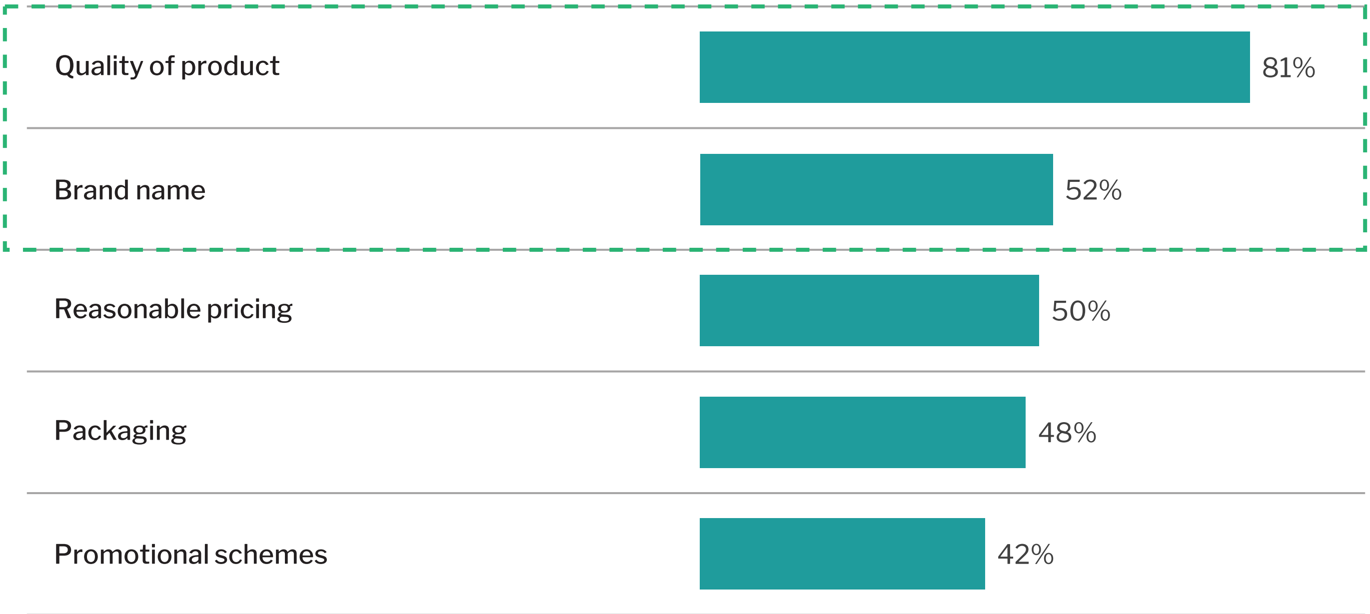


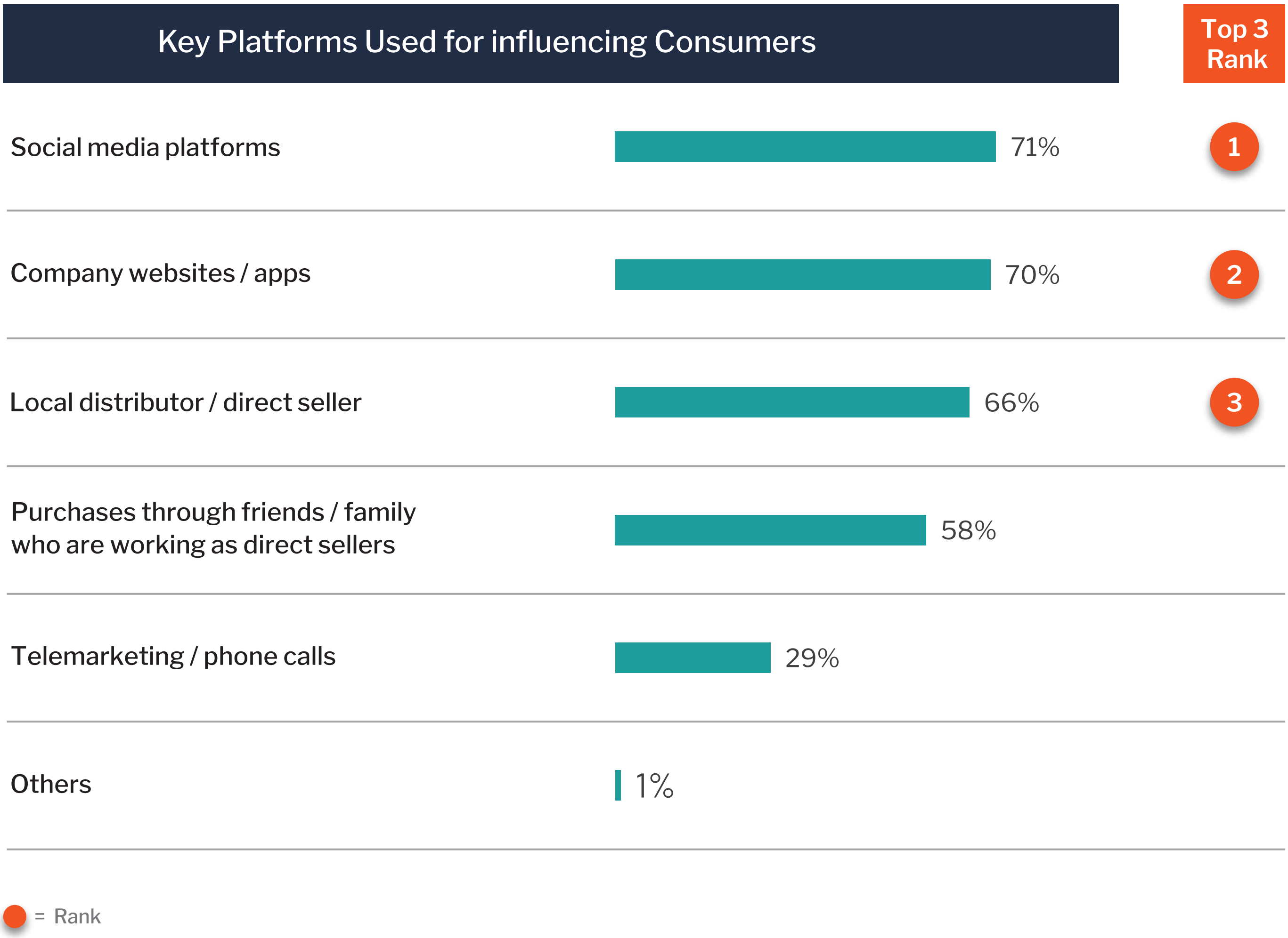
Figure 34. Key Motivations for Purchasing from Direct Sellers

Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Key Influences for Consumers for Purchasing Direct Selling Products

Digital platforms dominate as the **preferred channels as influence for consumers** to buy direct selling products, with social media (71%) and company websites/apps (70%) emerging as the most utilized avenues. Also, **local distributors and direct sellers (66%) continue to play a strong role**, reinforcing the importance of personalized engagement in the industry.

Additionally, **word-of-mouth influence remains significant**, as 58% of consumers purchase through friends or family who are direct sellers.

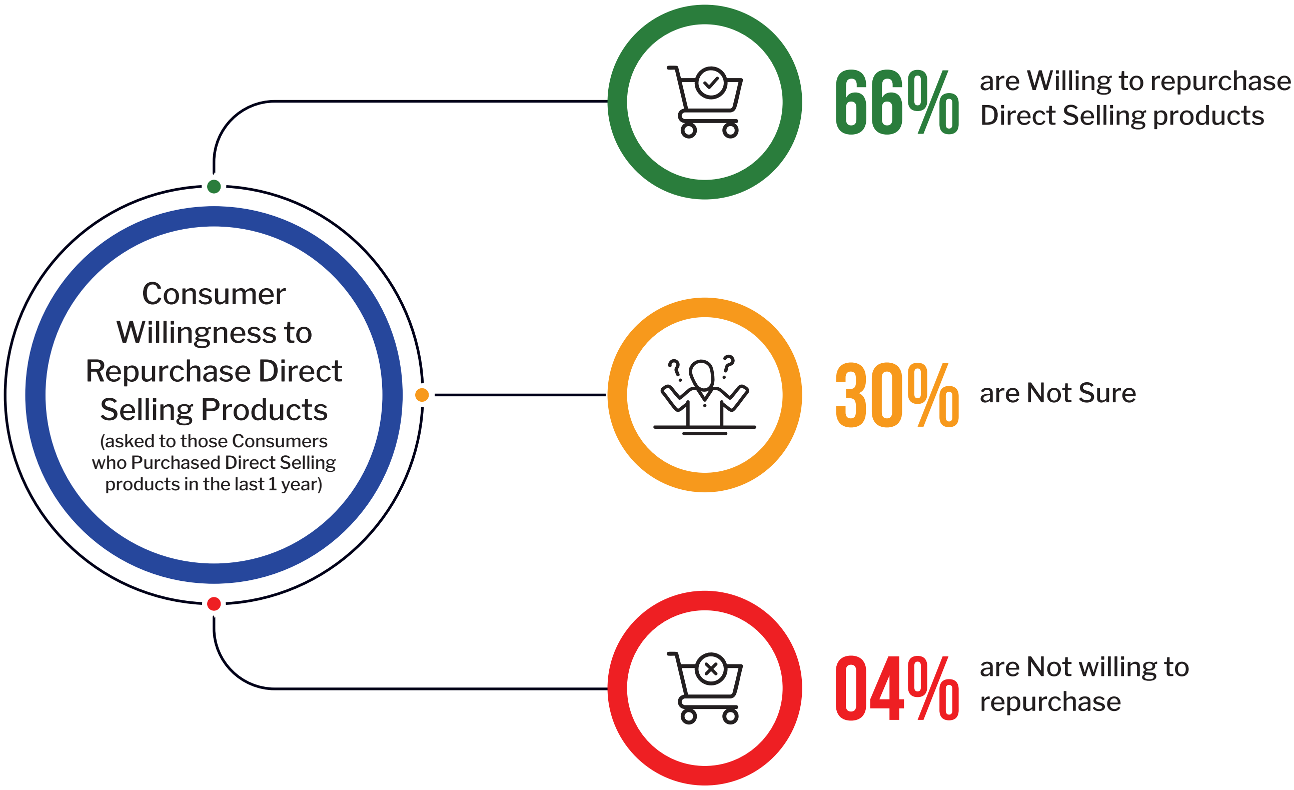


Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 35. Preferred Platforms for Purchasing Direct Selling Products

Likelihood of Repeating Direct Selling Purchases in the Next Year

A majority of **consumers (66%) express a clear willingness to repurchase direct selling products**, indicating **strong repeat purchase potential**. However, **30% remain undecided**, suggesting **room for building stronger brand conviction and post-purchase engagement**. A small minority (4%) are not willing to repurchase, pointing to potential areas for further exploration and improvement.



Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Table 2. Consumer Intent to Repurchase Direct Selling Products

Overall Satisfaction with Purchasing from Direct Selling Companies

Overall satisfaction remains strong, with **72% of consumers expressing positive sentiment**. However, 13% report dissatisfaction.

Women indicates higher satisfaction (4.21 mean score) compared to men (3.88 mean score).

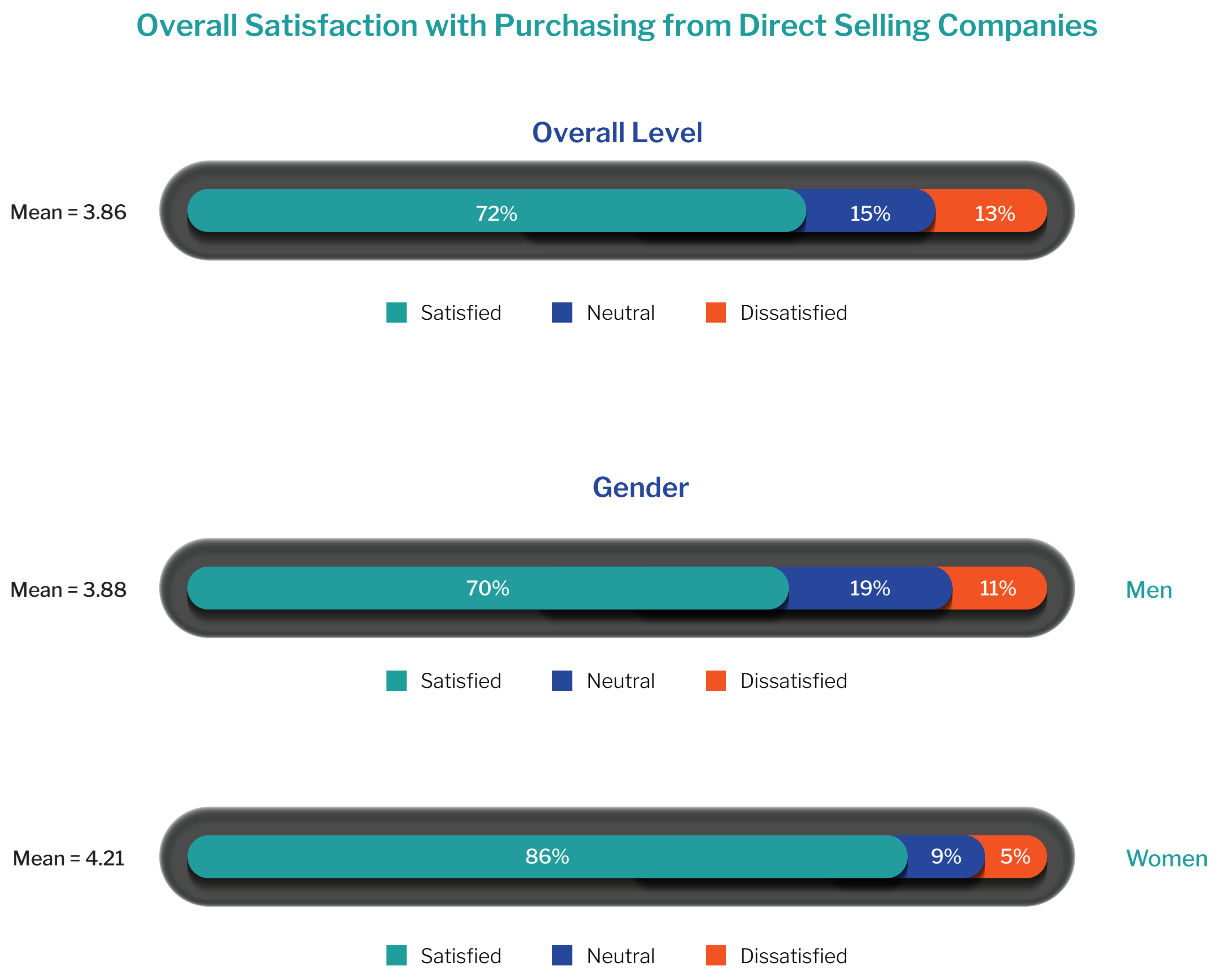


Figure 36. Satisfaction with Direct Selling Companies

Consumer Views: Pricing Perceptions & Return Warranty Awareness

Perception of Direct Selling Products on Competitive Pricing

76% of respondents believe that direct selling companies offer products at **competitive price** points, which is a positive indicator.

Figure 37. Consumer Perceptions of Competitive Pricing

Among Consumers Awareness of Product Return Warranties in Direct Selling

There is a significant opportunity to enhance transparency and consumer awareness of **product return warranty policies** in direct selling, as **32% of consumers are unaware that such warranties exist.**

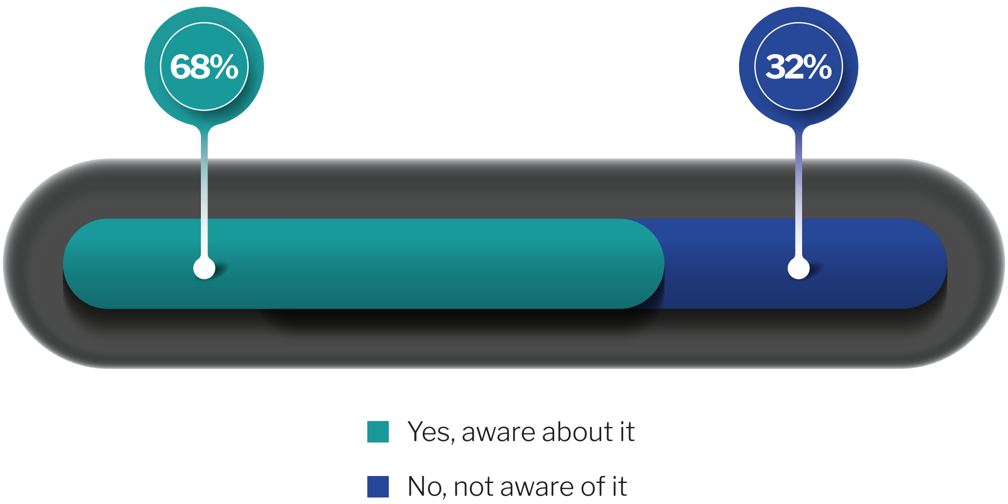
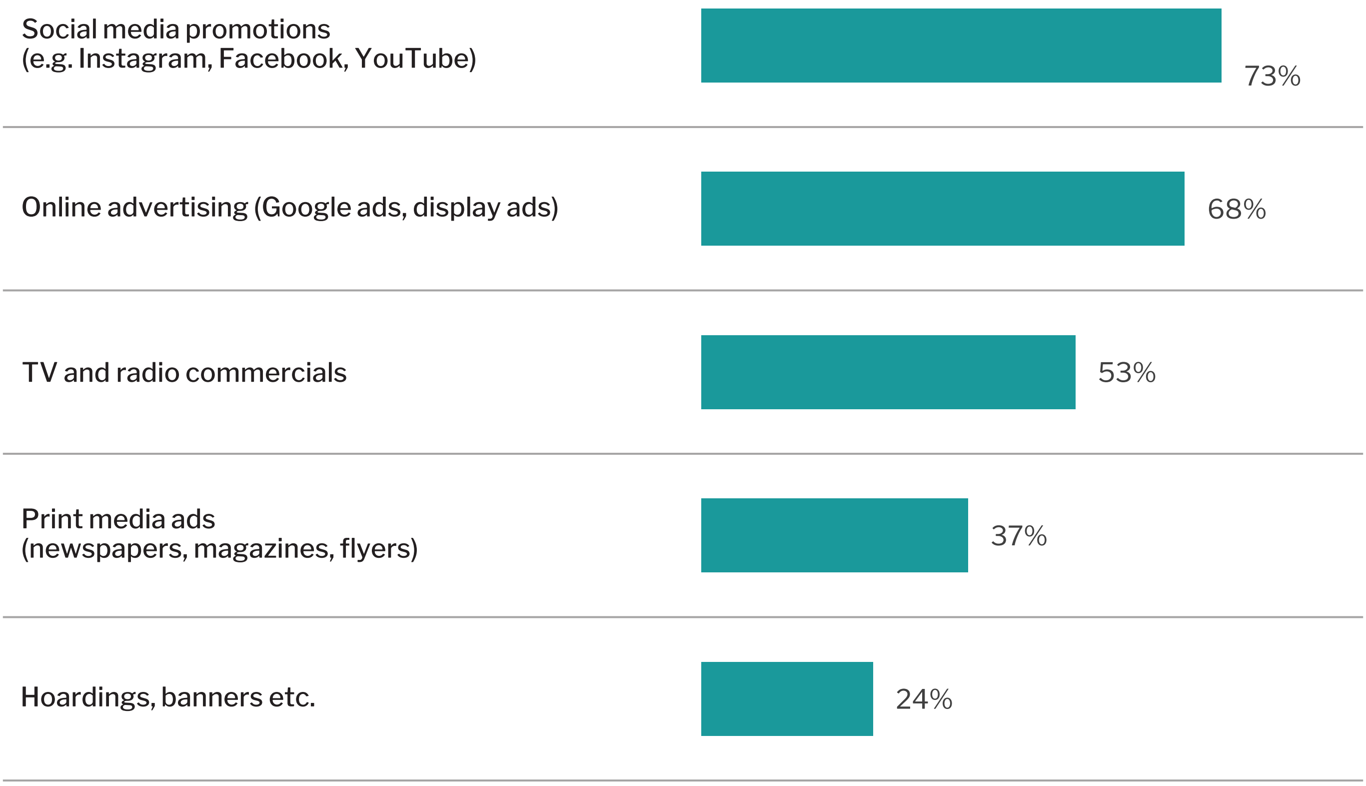


Figure 38. Consumer Awareness of Product Return Warranties in Direct Selling

Key Actions for Direct Selling Companies to Boost Consumer Awareness

When consumers were asked how direct selling companies can increase awareness, **social media promotions (73%) and online advertising (68%)** emerged as the most effective strategies, underscoring the dominance of digital platforms.



Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.

Figure 39. Consumer Suggestions to Enhance Consumer Awareness of Direct Selling Companies

Awareness of the Consumer Protection Act 2021 in Direct Selling

Over half (56%) of consumers are aware of the Consumer Protection Act 2021 in direct selling. However, 27% remain unaware, and 17% have only partial knowledge, **highlighting the need to increase awareness.**

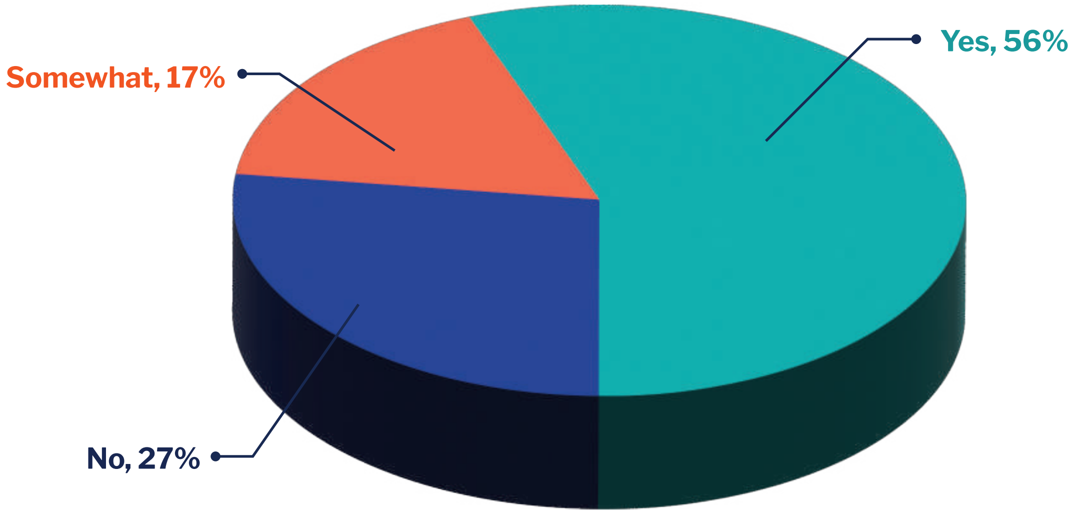


Figure 40. Consumers Awareness of the Consumer Protection Act 2021 in Direct Selling

Charting the Way Forward:
Vision and Aspirations for India's Direct Selling Industry

The Indian direct selling industry has reached a transformative juncture—where purpose meets potential. No longer an emerging sector on the sidelines, direct selling today is a recognized and expanding pillar of India's entrepreneurial economy. As India charts its journey towards becoming a USD 5 trillion dollar economy, and as national missions like "Aatmanirbhar Bharat" and "Startup India" gain momentum, the direct selling industry is well-positioned to contribute to inclusive growth, income generation, and self-reliance across urban and rural India alike.

Mr. Ajay Khanna
Managing Director, Herbalife India

"

As a premier health and wellness company, Herbalife has witnessed firsthand the surge in demand for healthier lifestyles, fuelling the rapid expansion of the wellness sector. This segment remains a cornerstone of the direct selling industry, driving consumer awareness and fostering inclusive entrepreneurship. By empowering over 8.8 million individuals in India with sustainable livelihood opportunities, our industry is more than just a marketplace – it catalyzes economic mobility. Looking ahead, I am convinced that the potent synergy between wellness and entrepreneurship will propel the next wave of growth for direct selling in India, creating a more resilient and impactful economic ecosystem.

A Growing Economic Contributor

The industry has empowered over 88 lakh individuals—many of them women, youth, and first-generation entrepreneurs—by offering flexible, scalable income opportunities that foster financial independence and skill development. In a landscape where traditional employment options are not always accessible or sufficient, direct selling offers a dignified and legitimate platform for self-employment, entrepreneurship, and community building.

Notably, the industry's contribution extends far beyond livelihood generation. It serves as a grassroots entrepreneurship engine, particularly in Tier II and Tier III cities, where economic decentralization is vital. Direct sellers become micro-entrepreneurs who not only earn for themselves but also drive product accessibility and awareness among consumers in underpenetrated markets.

The growth of the direct selling industry in India in recent years has been driven by factors such as digitalization, increasing health consciousness, one-to-one meetings and sales, and the appeal of self-employment. However, fraudulent schemes and a general lack of awareness have misguided people, affecting the industry's credibility and slowing its growth. On the positive side, the Consumer Protection (Direct Selling) Rules, 2021, have played a pivotal role in strengthening both the industry and consumer trust. By prohibiting pyramid and money circulation schemes, which had damaged the industry's reputation in the past, these rules have empowered direct sellers and promoted ethical business practices.

Key Drivers Of The Industry

1. Rising Demand for Wellness and Cosmetics Products

Two sectors—Wellness and Cosmetics & Personal Care—continue to dominate the Indian direct selling landscape, aligning closely with global trends and consumer priorities. The wellness segment, in particular, is experiencing exponential growth, driven by increased health consciousness, demand for preventive healthcare, and lifestyle shifts post-pandemic.

Direct selling companies are at the forefront of making high-quality, science-backed wellness products accessible to a wide consumer base. In doing so, they also promote awareness around nutrition, self-care, and sustainable living practices.

In cosmetics and personal care, the industry supports a growing demand for ethical, organic, and personalized beauty solutions. This not only caters to evolving consumer preferences but also opens avenues for women entrepreneurs to become trusted advisors and sellers of products that enhance everyday life.

Mr. Rajneesh Chopra
Managing Director, Amway India

The direct selling industry stands at a pivotal juncture—gaining long-overdue recognition from the government as a catalyst for self-employment, entrepreneurship, and consumer empowerment. With clear government regulations now in place, my vision is for the industry to become a mainstream avenue for empowering India's youth through purpose-driven, digitally enabled opportunities. With wellness emerging as a national priority and a core strength of the sector, direct selling is uniquely positioned to contribute to India's development goals. This is our moment to scale trust, create sustainable impact, and shape a future where opportunity is accessible to all.

2. Ease of Doing Business

Despite notable progress in policy recognition, the industry still navigates a fragmented regulatory environment. Varying interpretations and inconsistent implementation of the Direct Selling Rules, 2021 across states often create operational bottlenecks for companies and uncertainty for individual direct sellers.

Easing norms around product approvals, quality certifications, and logistics in the wellness and personal care segments – key growth drivers in the industry – can promote domestic production and reduce dependence on imports. Encouraging investments in digital infrastructure and enabling easier access to training platforms for direct sellers—particularly in tier-2 and tier-3 cities—will improve outreach, consumer engagement, and productivity.

In the long term, institutionalizing direct selling as a formal sector, integrating it with national skilling missions, and fostering public-private collaboration for outreach and education will ensure that it continues to thrive as a legitimate, empowering, and impactful part of India's economic narrative.

Mr. Samir Modi
Managing Director, Modi Enterprises

With continued support from the government, the direct selling industry can become a powerful catalyst in building Atmanirbhar Bharat. Direct Selling can uplift society, strengthen family and community ties, and reduce migration from hometowns - ultimately contributing to a self-reliant, skilled, and empowered nation.

3. Women Led Entrepreneurship

At its core, direct selling creates a level playing field for women—offering flexible, dignified, and self-paced opportunities to generate income, develop business acumen, and gain financial independence. In both rural and urban India, it is enabling women to step into leadership roles, build community networks, and reshape traditional gender roles.

As wellness, beauty, and personal care continue to dominate consumer demand, women have become key drivers of growth in these sectors. Favorable demographics, rising health awareness, and evolving consumer aspirations have further accelerated this trend. While the industry faces increasing competition from e-commerce and quick commerce platforms, direct selling uniquely stands out for its community-driven model and its ability to uplift women through economic participation and empowerment.

Ms. Edyta Kurek
SVP and Head of India & Indonesia, Oriflame

The direct selling industry offers a unique opportunity for women in India. While globally in Direct selling Industry, 80% of the workforce is women, in India it's only 44%. This gap represents incredible potential for growth as our model provides flexible entrepreneurship, training, and a second income stream critical for many Indian families.

4. Upskilling Youth and Nurturing Entrepreneurial Spirit

The industry inherently promotes a culture of continuous learning, equipping individuals with vital life and business skills—from communication and digital marketing to financial literacy and leadership. These competencies not only enable self-sufficiency but also spark entrepreneurial ambition, allowing individuals to scale their operations and become job creators in their own right.

Mr. Jegiathesan Subramaniam
Managing Director, K-LINK Healthcare, India

At its core, the direct selling industry is a catalyst for skill development. We see it as a platform where individuals are not just earning but evolving—gaining critical competencies in communication, digital marketing, financial discipline, and leadership. Continuous learning is embedded in the DNA of direct selling. It's this culture of upskilling that allows individuals to adapt, grow, and ultimately build businesses that create value far beyond themselves.

5. Technology, Innovation & Digital Transformation

India's direct selling industry is increasingly recognized for delivering high-quality, globally benchmarked products, especially in categories like wellness, nutrition, and personal care. Innovation is embedded in every layer—from product development backed by scientific research to the use of AI, digital platforms, and e-commerce tools that empower sellers and enhance customer engagement. This digital-first approach is making the industry future-ready, scalable, and aligned with the aspirations of India's tech-savvy youth.

As the industry evolves, digital transformation is not just a tool—it is a critical enabler of transparency, operational efficiency, and sustainable growth in a competitive marketplace.

Mr. Satyan Bhatia
Managing Director, International Marketing Corporation (IMC)

At IMC, we envision the direct selling industry as a powerful catalyst for inclusive growth and entrepreneurial empowerment. With innovation, trust, and wellness at its core, the industry is set to drive economic resilience, generate employment, and uplift communities. The coming years will see direct selling evolve as a key pillar in India's socio-economic transformation.

Vision 2035:
A Model for Inclusive & Aspirational Growth

As India looks toward a future of self-reliance, digital empowerment, and sustainable development, the direct selling industry stands as a vital enabler. Its unique ability to blend economic opportunity with personal growth, and technological innovation with human connection, makes it a model for inclusive, sustainable, and aspiration-driven progress.

Mr. Shishir Jha
Country Head-India, 4Life Trading India Ltd.

Direct Selling in India is evolving rapidly, with growing recognition from the government as a vital contributor to self-employment and entrepreneurship. This momentum will enable credible companies and entrepreneurs to operate with greater confidence, reaching more consumers with innovative, science-backed products. IDSA's role in driving transparency and ethical practices will be crucial in this transformation.

Mr. Abhishek Gupta
Managing Director, Altos Enterprises Ltd.

Our vision is to elevate the direct selling industry as a pathway to entrepreneurship and empowering people. Our goal is to redefine direct selling as a dynamic force for economic growth, innovation, and opportunity for every individual.

Dr. S.I. Abraham Lee
Head & MD, Atomy India

We envision that by 2047, 10% of the entire Indian population will be engaged as direct sellers, creating an ecosystem of empowered entrepreneurs and sustainable economic advancement. At Atomy India, our vision for the future of the direct selling industry is fully aligned with our Prime Minister's initiative for a "Viksit Bharat 2047" and it is our unwavering belief that through visionary leadership, innovative technology, and grassroots empowerment, these dreams will translate into reality.

Mr. Puneet Madan
Regional VP & Managing Director, USANA India

At USANA, we envision a future where science-led nutrition and purpose-driven entrepreneurship create real, lasting impact. The direct selling industry is uniquely positioned to champion preventive health and economic empowerment—especially for women, who are emerging as powerful voices and wellness leaders. As health becomes a priority and personalization drives choices, USANA remains committed to leading with integrity, innovation, and a deep human focus. Our goal is simple yet profound: to build a healthier, more resilient India—which is pivotal to our mission of creating The Healthiest Family on Earth.

India is currently the **11th largest market for direct selling globally** and is envisioned to be in the **top 8 markets by 2035** – a testament to its untapped potential and growing domestic demand. To unlock this potential, it is vital for the direct selling industry to align with the nation's broader goals of economic empowerment, job creation, and social upliftment. While the potential of Direct Selling is vast, several key challenges need to be addressed to achieve this transformation. These include establishing strong ethical standards, enhancing transparency, equipping entrepreneurs with digital skills, and navigating the evolving regulatory landscape. Tackling these concerns is essential to forging a clear and actionable path forward.

In the decade ahead, a shared commitment between different stakeholders including government, industry, and consumers will be essential. With the right frameworks and forward-looking vision, the direct selling industry can emerge not just as a commercial channel—but as a catalyst for social progress, innovation, and inclusive prosperity. As we look toward 2035, the path ahead is full of promise—and India's direct sellers are ready to lead the way.

Team Involved in the Study

Mr. Romesh Kumar Puri
Secretary General at Indian Direct Selling Association (IDSA)

Ms. Amarpreet Kaur Chawla
Senior Manager at Indian Direct Selling Association (IDSA)

Manasi Mody
Principal
at Ipsos Strategy3

Asim Makrani
Consultant
at Ipsos Strategy3

Disclaimer

ABOUT INDIAN DIRECT SELLING ASSOCIATION

Incorporated in the year 1996, the Indian Direct Selling Association (IDSA) is an **autonomous, self-regulatory body for the direct selling industry in India.** The Association acts as an interface between the industry and policy-making bodies of the Government facilitating the cause of Direct Selling Industry in India. IDSA is the only association from India to have affiliation with the World Federation of Direct Selling Association (WFDSA), the prestigious global body representing over 60 national direct selling associations currently active in nearly 170 countries around the world.

For more than 2 decades, IDSA has been engaged in advocating towards fostering a conducive environment for the growth and development of the direct selling industry in India and a comprehensive regulation mechanism for the industry. IDSA charts change through advocacy, research, dialogues, engagement with member companies and campaigns dedicated to the promotion and growth of the industry in India.

IDSA®
INDIAN DIRECT SELLING ASSOCIATION
WFDSA Member

INDIAN DIRECT SELLING ASSOCIATION
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