Eight of Top 10 brands were banks or automobiles.

Brand contribution leaders came from diverse categories.

The strong got stronger.

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<thead>
<tr>
<th>Sector</th>
<th>% Change in Sector Brand Value</th>
<th>Top 50 Total Value</th>
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<td>Food</td>
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TOP 10 IN BRAND CONTRIBUTION

Brand contribution leaders came from diverse categories.

Financial Services, Home and Personal Care lead brand value growth.

August 2014 - July 2015

www.brandz.com
IN INDIA’S VIBRANT DEMOCRACY, PROGRESS CAN BE RAUCOUS AND SLOW, BUT STEADY.
The Indian respect for the past makes progress slower, but more sustainable

Brand success requires fresh insights into a distinctive market

This second annual BrandZ™ Top 50 Most Valuable Indian Brands report has set a record. It increased an impressive 35 percent in value, a rate that exceeds the growth of the Global Top 100 for every year since the launch of the Global BrandZ™ rankings a decade ago.

India’s strong economy – 7.5 percent GDP growth expected this year – helped drive brand value appreciation; of course. But if brand value depended on economic push alone all brands would benefit, and roughly equally. But that’s not the case.

Most categories in the BrandZ™ India Top 50 improved significantly in brand value, but some did not. And seven brands that actually increased over 20 percent in brand value dropped down in the ranking. They grew fast, but not fast enough.

This growth imperative, and the many other important insights and takeaways in this report, lead me to the following three key conclusions, which I believe are critical for all brands that intend to successfully compete in India.

I start with this basic point: No matter what market you’re doing business in, and regardless of how fast it’s growing, success relative to the competition comes down to brand. Successful brands in the India Top 50 understand Indian consumers and their rapidly expanding needs and desires.

These brands have segmented their product portfolios, adding premium and other offerings, and they’ve used media, particularly mobile, in innovative ways. And I’m not saying only of brands with Indian ownership. In fact, 30 percent of brands in the BrandZ™ India Top 50 are owned by multinationals. These corporations, which are publicly traded in India, have so thoroughly understood the Indian consumer the brands are considered Indian in the consumer’s mind.

Second, Indians today feel empowered. This empowerment is related to optimism inspired in part by the current Indian political leadership and its visionary promises. But it’s deeper. Indians feel proud and confident in the future. According to The Futures Company: Global MONITOR, 78 percent of Indians say it’s important to demonstrate pride in India.

This empowerment permeates the society and is the energy that brands need to link with to succeed. That requires brands to not simply tap into the energy, but to connect with it in constructive ways that help Indians build a more prosperous and equitable India.

Third, the prospect of building brands in the fast growing Indian market is exciting but it’s also challenging because India is different in many ways from other country markets. It will not do to only apply lessons learned from other country markets. If you rely solely on the winning strategies and tactics from your last battle, you’ll likely lose.

Rather, it’s important to understand India in depth, as a young modern state, not yet 70 years old, built on the culture and traditions of a 5,000-year-old civilization. India is a place where consumers feel pulled in two directions – to the past and to the future – often at the same time. To succeed in India, brands need to “get” this phenomenon in all its nuances.

This report is a primer in understanding the opportunities and challenges for brand building in India. It examines the BrandZ™ India Top 50 ranking results, explores the many opportunities that brands face in India, and analyzes the cultural distinctions and contradictions that need to be understood in order to build sustainable brand value in a market that’s this complicated and growing with such speed.

BUILDING VALUABLE BRANDS

Brand experts from 14 WPP companies in India contributed to this report with insights and thought leadership essays that provide deeper strategic understanding and tactical advice for implementation.

Our experts are specialists in advertising, insight, branding and identity, direct, digital, promotion and relationship marketing, media, investment management and data investment management, and public relations and public affairs. We are especially focused on new global markets and new media, the application of Big Data and the coordination all our resources for the benefit of our clients; something we call “horizontality.”

Collectively we bring global knowledge based on our WPP presence in 112 countries.

By linking all this talent, creativity, and wisdom we amplify global trends and insights that help our clients in useful and unique ways. We invite you to access our unrivaled BrandZ™ resource library. It’s titles include: the BrandZ™ Top 100 Most Valuable Global Brands 2015; the BrandZ™ Top 100 Most Valuable Chinese Brands 2015; the BrandZ™ Top 50 Most Valuable Indonesian Brands 2015; and the BrandZ™ Top 50 Most Valuable Latin American Brands 2014. To download these and other BrandZ™ reports, please visit www.brandz.com. For the interactive BrandZ™ mobile apps go to www.brandz.com/mobile.

The backbone of all this intelligence remains the WPP proprietary BrandZ™ database, the world’s largest, customer-focused source of brand equity knowledge and insight, and the BrandZ™ brand valuation methodology of Millward Brown, a WPP company. Our BrandZ™ database now has more than 4.5 billion individual data points. It’s a manifestation of Big Data and, yes, it is in the cloud!

It’s our consumer focus that makes all this data not just big, but powerful. First we analyze relevant corporate financial data and strip away everything that doesn’t pertain to the branded business. Then we take a critical step that makes BrandZ™ Unique and definitive among brand valuation methodologies – we add unparalleled consumer research.

The BrandZ™ database includes in-depth quantitative consumer research with more than 3 million consumers across 50 markets to assess consumer attitudes about, and relationships with, over 100,000 brands in 400 categories.

At WPP, we’re passionate about using our creativity to establish and build strong, differentiated brands that deliver lasting shareholder value. To learn more about how to apply our experience and expertise to benefit your brand, please contact any of the WPP companies that contributed expertise to this report. Turn to the resource section at the end of this report for summaries of each company and the contact details of key executives. Or feel free to contact me directly.

Sincerely,

David Roth
CEO The Store WPP, EMEA
Twitter: davidrothlondon
Blog: www.davidroth.com
PART 1

Introduction
A 33 percent rise in brand value sets record for BrandZ™ rankings

Brands that contribute to India’s growth can benefit from it

The BrandZ™ Top 50 Most Valuable Indian Brands 2015 increased 33 percent in value, a rate that exceeds the growth of the Global Top 100 for every year since the rankings were launched a decade ago.

This remarkable growth rate illustrates the overall strength of the Indian market, with a GDP growth of 7.5 percent, faster than any other major market worldwide. And it also points to the particular strength of the financial sector, banks and insurance brands, which increased 49 percent in brand value year-on-year.

Most important, the brand value rise reflects the renewed sense of empowerment and possibility in India, which most dramatically impacts women, but touches the entire society. Brands that excelled in brand value growth responded to this spirit by understanding the changing consumer and responding with innovative products and communication.

As noted in the following headlines, rapid growth produced not only many unprecedented opportunities, but also some potential threats:

- Growth spread across categories: Not only the financial services sector increased sharply in brand value, home and personal care brands rose 32 percent, and the increases of many other categories exceeded 20 percent.
- Growth spread across ownership models: State-Owned Enterprises (SOEs) led in brand value growth, but private brands, and brands owned by multinational corporations (MNCs) with long history in India, also grew in brand value.
- Growth alone sometimes wasn’t enough: Seven brands dropped in rank, although they increased over 20 percent in value, and four brands dropped out of the ranking completely.

In addition, disruption is on the near horizon. Some brands, particularly in e-commerce and mobile handsets, have not yet been included in the India Top 50 because they’re not publicly traded, a BrandZ™ country ranking eligibility requirement. But that condition could change, imminently.

INDIA IS DISTINCTIVE

The headlines tell only part of the story. India is not simply growing quickly; it’s growing differently. Brand building in India requires gaining the deep insights needed to understand these differences.

Indians prefer Indian brands. But what is an Indian brand? In fact, 70 percent of the brands in the BrandZ™ India Top 50 are of Indian origin. Only 18 percent of the India Top 50 brands are SOEs, while 52 percent are private, either owned by individual companies or by large Indian conglomerates, an indication of India’s entrepreneurial energy.

The other 30 percent of brands are owned by MNCs publicly traded in India. However, many of these brands have operated in India so long and effectively, they’ve established themselves as Indian brands in the minds of consumers, suggesting that the “Indianness” of a brand depends more on how it’s perceived than on its provenance.

Indian consumers trust brands. While trust in brands is declining or settling at low levels in much of the world, trust in brands is growing in India for variety of reasons, including consumer appreciation for brands and the rapid expansion of brand choice. Indian consumer trust in brands seemed to hold even during a recent food safety crisis similar to scandals that eroded brand trust in China.
BRAND SUCCESS REQUIRES DEEP INSIGHT

While the opportunity in India is great, it can’t be realized by simply implementing the strategies or tactics that proved successful in other country markets. India is complicated for many reasons that are distinctive to India. Indians are comfortable with dualities and tensions that don’t exist to the same extent in other markets, and making decisions based on appearances alone can lead to costly mistakes. These dualities include:

Modernity and tradition: As Indians welcome more brands, and the modern comforts and conveniences they offer, they try not to displace cherished traditions, but rather integrate them. Brands need a strategy for responding to this reality.

Individual and collective: As brands in other parts of the world try to infuse brands with purpose beyond simply making money, higher purpose remains a basic expectation in India. Building a brand also means helping to build India. The government mandates Corporate Social Responsibility spending.

Urban and rural: Almost 70 percent of the population still lives in rural India, and these individuals overall are poorer and less well educated than the growing middle class of India’s cities. But the urban-rural divide is changing. And the most successful brands are trying to close the gap.

OPPORTUNITY TO BUILD BRANDS

In May 2014, Indians rejected the Indian Congress Party, which had governed the country for most of the almost 70 years since independence, and elected a new government led by Narendra Modi and the Bharatiya Janata Party, which presented a transformative vision of a more prosperous and equitable India. In less than two years in office, this government has promulgated several initiatives to advance this vision in ways that both support brands and invite their participation. The permitted levels of Foreign Direct Investment (FDI) increased across many categories, for example, and FDI rose almost 25 percent in fiscal 2015, according to India government sources.

The government’s Make in India initiative and other programs, such as Digital India and Smart Cities, are aimed at increasing access to education, health care, jobs, and adequate housing. Brands have an opportunity to engage with these endeavours, which ultimately can result in a larger and more affluent consumer market.

Brand building in India requires some patience, however. India is a democracy—the largest democracy on earth—change often happens slowly and not without rigorous debate. But when change happens, it tends to be stable and sustainable.

India has the possibility not only to become a more prosperous and equitable nation, but also to achieve this goal in a different, “Indian” way that becomes an alternative economic growth model—slower, perhaps, but more sustainable, adding financial value while maintaining cultural values. Brands can participate in this growth and build successful brands, while at the same time helping India develop as a modern state with products and services that add convenience and comfort, but leave the planet more intact and individuals more emotionally and spiritually nourished.
Food is local, cultural and diverse. Preferences vary from region to region.
A stock portfolio comprised of the BrandZ™ Top 50 Most Valuable Indian Brands increased a healthy 18.6 percent in value between August 2014 and July 2015, while over the same 12-month period, India’s SENSEX, a weighted index of 30 stocks on the Bombay Stock Exchange, increased only 1.5 percent.

In outperforming SENSEX, the BrandZ™ India Top 50 Portfolio produced an ROI that’s more than 12 times greater. Put another way, $1,000 invested in the BrandZ™ India Top 50 Portfolio would have grown in just a year to $1,186. The $1,000 invested in the SENSEX stocks would be worth only $1,015.

The performance of the BrandZ™ India Top 50 Portfolio demonstrates another key reason for building strong, valuable brands. They not only drive sales volume and market share growth, but strong, valuable brands also generate superior returns for shareholders.

BrandZ™ India Top 50 Portfolio outperforms SENSEX

The BrandZ™ India Top 50 Portfolio vs. SENSEX India
Over a 12-month period, the BrandZ™ India Top 50 Portfolio yielded an ROI over 12 times greater than India’s SENSEX Index.

Source: BrandZ™ / Millward Brown / Bloomberg
Results indicate vibrant growth for brand value

The trend lifts brands across most sectors

**Brand Value Rises 33 Percent, Sets BrandZ™ Ranking Record**

The 33 percent year-on-year brand value increase of the BrandZ™ India Top 50 exceeds the growth rate of the Global Top 100 for every year since the rankings were launched a decade ago.

**Financial Services Sector Leads with 49% Increase**

The total brand value of the 13 bank and insurance brands in the BrandZ™ India Top 50 rose 49 percent and produced 41 percent of the India Top 50 value. State owned banks drove most of the value growth.

**Home and Personal Care Categories Up 32 Percent**

Driven by consumer confidence, increased disposable income, and spending on premium products, the home care, personal care, paints and jewelry categories collectively increased 32 percent in brand value.

**Rise in Brand Value Links with Strong Brand Power**

The BrandZ™ India Top 10 increased 34 percent in brand value and 38 percent in Brand Power, a BrandZ™ brand equity metric that indicates a brand’s ability to grow sales volume and market share. The correlation indicates how strong Brand Power drives brand value.
HDFC BANK REMAINS RANKING’S MOST VALUABLE BRAND

Achieving a 33 percent rise in brand value, HDFC Bank remained number one in the BrandZ™ India Top 50, as the rapidly expanding private bank introduced the brand to new customers, particularly in rural markets, driving up profits with revenue growth and cost optimization.

UNION BANK OF INDIA BRAND VALUE UP 72%

One of India’s largest state owned banks, Union Bank of India increased brand value an extraordinary 72 percent as it accelerated digitalization efforts and expanded its Immediate Payment Service (IMPS), a real-time money transfer facility popular in India. These initiatives reflect a brand building focus on customer centricity.

LAKMÉ LEADS RANKING IN BRAND CONTRIBUTION

The second-fastest riser, with a brand value increase of 69 percent, skin care brand Lakmé also led the BrandZ™ India Top 50 in Brand Contribution, the BrandZ™ measurement of the proportion of sales and margin directly attributed to the brand alone. Brand strength helped Lakmé command a premium for its products.

THE 4 NEWCOMER BRANDS IN TOP 50 ARE INDIAN OWNED

The four brands that debuted this year in the BrandZ™ India Top 50 are of Indian origin. Three are private brands and one, a bank, is a State Owned Enterprise. This result indicates the influence of Indian entrepreneurs and Indian family conglomerates.

PRIVATE BRANDS COMPRISE MAJORITY OF TOP 50 RANKING

Private brands of Indian origin comprise 52 percent of all the India Top 50 brands. The proportion of privately owned and state owned brands increased slightly year-on-year. While multinational proportion declined marginally, many of these brands are so embedded in local life, consumers think of them as of Indian origin.

CONSUMER TRUST IN BRANDS IS HIGHEST IN INDIA

About one-third of Indians said they trust brands compared with roughly a quarter of consumers in other parts of the world, where trust is leveling or continues to decline. Indians appreciate their expanding brand choice and were less impacted by the global financial crisis that disenchanted consumers worldwide.
Rising empowerment touches all segments of Indian society, both urban and rural

Women’s greater independence is the most impactful change

Indians feel a renewed sense of confidence since they deposed the Indian National Congress party that had ruled the country for most of the almost 70 years after independence. In that election, in May 2014, Indians took a step beyond the politics of 2014, Indians took a step beyond the politics of past threats to a period of heightened expectations and empowerment.

The new government, led by Narendra Modi and the Bharatiya Janata Party, promised a transformative vision for a more prosperous and equitable India, which it has begun to advance with ambitious programs that include:

**Digital India:** A connectivity initiative aimed at harnessing the power of digital technology to build national electronic networks, improve government efficiency and empower Indian citizens with expanded access to information, education, health and other services.

**Smart Cities:** An urban initiative to empower the unempowered by replacing village-based narrow economies with new cities, built throughout the country with state-of-the-art technology and infrastructure, and providing broader job opportunities.

**Make in India:** An economic initiative aimed at empowering Indians with job opportunities and enhanced skills. Make in India increases levels of foreign investment permitted across over 20 sectors, to encourage more international brands to manufacture and sell in India. Implementation of these programs entails dealing with high costs, enormous complexity and historical bureaucratic sluggishness. Progress has been slower than planned but fast enough to sustain credibility. GDP is expected to grow 7.5 percent this year, faster than any other major economy, including China, according to the IMF. Both presidents Xi Jinping and Barack Obama visited Prime Minister Modi during his first year in office, signaling that both China and the US view India as a key strategic partner. Consumers are spending. Brands are expanding to India and brand values are increasing. All these developments produce a strong sentiment that this is India’s time.

**Empowerment touches all segments of society**

Empowerment throughout Indian society began with the liberalization of the economy in 1991. A more capitalist and less socialist approach produced rising respect for individual initiative. More flexible interpretation of traditional societal roles paralleled the relaxation of the central control and regulation of the economy.

The empowerment of women is the most impactful aspect of this change. Indian women represent a large potential market of around 620 million people, or about half the population of India and almost twice the population of the US.

Their empowerment is transforming the traditional Indian family structure and touching all segments of Indian society. It has forced brands to reconsider their messages and the media they use to communicate them.

An Indian woman in the workplace today, born before economic liberalization began, grew up in a time when choosing a spouse was her parents’ decision, she was not doing all the chores. Her role in life revolved around duty to husband and family. Pursuing education was fine, but just enough to be eligible for marriage.

Today, this woman not her parents’, is more likely to select her spouse. Her marriage is more of an equal partnership. Although she may manage the family day-to-day, she’s not doing all the chores. Her role models, traditionally her mother and mother-in-law, now include women of worldly accomplishment. Growing in confidence, she’s concerned less with her reputation and more with being recognized for who she is and what she can become.

Research by The Futures Company’s Global MONITOR found that 60 percent of Indian women today feel they control their financial futures, compared with a global average of 45 percent. And 51 percent of Indian women, compared with a 33 percent global average, say they’ll take on short-term debt to purchase items they want.

**Brands across categories respond**

The government of former Prime Minister Manmohan Singh established a bank dedicated to women in 2013. Many banks, such as State Bank of India, now offer loans with special terms for women entrepreneurs. Banks address women in their ads, offering loans for home improvement and other needs.

The attempt to reach women extends to many other categories previously targeted at men. Not long ago, the paint category was a male domain. Today, leading brands, such as Asian Paints and Berger Paints, direct messages to women who often are the home decoration decision makers. Hero motorcycles markets a model specifically for women.

**Empowerment of women is unfolding at different speeds across India. The choices women have – or don’t have – influence the products they need and use. Even as Indian women exert greater independence, almost 80 percent also believe it’s important to preserve family traditions, according to The Futures Company’s Global MONITOR.**

To fit the needs of women all along the empowerment spectrum, Unilever tailored its portfolio of laundry detergents. Basic bar soap is available in smaller towns and villages, where many women still do laundry by hand. In more affluent urban neighborhoods, shoppers can find liquid washing machine detergents to add convenience, save time and balance work and family.

In a campaign for its Ariel detergent, Proctor & Gamble raised the question: Is doing the laundry only a woman’s job? One ad features two older women conversing over tea while a young woman works on her laptop. A young man enters, complaining to the young woman that she hasn’t washed his green shirt. The ad ends with an invitation to react on Twitter at #ShareTheLoad. It prompted an online debate.

**Further progress needed**

Evolving gender roles are evident in popular media, where films and TV programs now are more likely to feature strong and assertive women characters. And a growing number of men populate the audiences of TV cooking shows.

Change is happening even in small towns and villages, although more slowly. Several years ago the government promulgated a policy to assure minimum representation by women on village governing bodies.

Further progress is needed, however, as measured by the UN Gender Inequality Index. India ranks 135 out of 187. Of the other BRICs, Brazil ranks 79, Russia 57, and China 91.

Empowerment of women opens new possibilities for everyone – men and women. But it’s a powerful disruptive force in a society organized around a long-accepted hierarchy that favored men and left women weaker in health, wealth and education.

It challenges ancient social conventions in ways that motivate most people to find a moderate balance between tradition and modernity. In extreme cases, however, this rupture with the past threatens male self-esteem, produces resentment and contributes to considerable incidents of violence against women in India.

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**KEY THEMES:**

- Digital India: Promised a transformative vision for a more capitalist economy.
- Smart Cities: Improved government efficiency and empowered Indian citizens.
- Make in India: An economic initiative for economic liberalization.

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**Part 1 | Introduction - Key Themes**

**Key Themes: Empowerment**
As India contends with all the pressures of any other fast growing market trying to rapidly build an economy, increase wealth and expand the middle class, it also faces a distinctive challenge – accomplishing all this while remaining fundamentally Indian.

This desire to live vibrantly in the present while respecting the foundational values and traditions of a 5,000-year-old civilization touches Indian men and women of all ages, regions, and religions – and the government itself.

This duality means, for example, that consumers want the latest and also the most traditional fashions; and that the new cities the government builds in rural India will feature modern high rises and shopping malls, but also temples and mosques.

Like anywhere else, tradition in India can be cumbersome, ritualistic, impractical and inconvenient. Indians respect and protect tradition, however, because it's a critical aspect of their personal and national identities.

Progress can be slow, but it's more likely to be sustainable. It's not built over a fault line between past and future, but rather on a secure seam fused over time by heated and sometimes contentious debate.

Brand success in India requires acknowledging the tension between tradition and modernity and the challenges and opportunities it presents for developing relevant products and building close customer relationships.

EMPOWERMENT AND OPPORTUNITY

The tension between tradition and modernity is fluid. Recent consumer attitudes reflect greater empowerment and recognition of the primacy of the individual. Here are several examples:

Mind over matter: In the past, Indians valued mind over matter. Most of India's religious traditions center on renouncing the physical world by exercising mental power. Today, substance and style coexist.

Winning: In the past, the goal in a contest or negotiation was to reach a mutually agreeable compromise. Today, the goal more often is to win everything.

Merit: In the past, people respected the person descended from a prominent family, educated in the best schools, carrying success easily, whether earned or not. Today, people have high regard for the small town achiever who overcomes disadvantages to succeed.

Similarly, people in the past believed their destiny was determined at birth. Most people have abandoned that view. And greater empowerment not only opens more opportunity, but also loosens the social constraint that shaped families and the society.

THE “GLOBAL” INDIAN CONSUMER

The term “global” Indian consumer doesn't refer to someone seeking advancement in North America or another destination in the Indian diaspora. Rather, it increasingly describes an Indian physically living in India but with a global mindset. These Indian consumers adhere to traditions, but are aware of international brands because of travel and popular culture.

They can afford international brands and feel entitled to purchase them. In the clothing they wear, the music they listen to, the decor of their homes, these people appear like other international cosmopolitans and are as responsive to international popular fads and trends. But they navigate the most important aspects of their lives – relationships between husband and wife, raising children, respecting parents – with values that are emphatically Indian.

Some may look like young people anywhere struggling to be independent from their parents, and many fit that description. But a generation gap, a chasm of misunderstanding between children and their parents, doesn’t exist in quite the same way in India as it has in the West.
**Preserving traditions ranks high among Indian priorities**

Even as the pressures of modern life erode traditions and family ties in much of the world, preserving these values continues to be a driving force shaping Indian society.

In the 2014 Futures Company Global MONITOR survey of 24 countries, 79 percent of Indians answered that it was extremely or very important for them to preserve their family’s cultural traditions. The average response among the other countries was only 58 percent.

This finding doesn’t automatically mean that preserving family traditions circumscribes engaging in the modern world or enjoying its benefits. Rather, respect for tradition and the engagement with modernity coexist, as suggested by other Futures Company findings.

Almost two-thirds of Indians compared with less than half of respondents from other countries agree with the statement, “I am always looking for different cultural experiences and influences that will broaden my horizons.”

Similarly, when asked about what accomplishments they consider to be signs of success, “Being a dutiful member of your family” was selected by 71 percent of Indians, compared to an average of 54 from all the countries surveyed.

Revealing some movement in the tension between tradition and modernity, the Indian response about family loyalty declined slightly between 2013 and 2014. The desire for luxury products and brands, another success measure, increased.

Indians are grounded in their own traditions and not constrained by them. Being secure in their own cultural identity Indians feel free to explore those of others. That disposition may be natural in a nation of 22 official languages where people daily encounter both commonality and difference.

**Tradition and modernity coexist...**

Compared with the average consumer across 24 countries, Indians are notably more inclined to believe it’s important to preserve family traditions.

**...Loyalty symbolizes success...**

Compared with the average consumer across 24 countries, Indians are much more likely to view being loyal to family and owning luxury brands as measures of success.

**... But Indians are open to new experiences**

Compared with the average consumer across 24 countries, Indians are much more open to experiences outside their own backgrounds.

% who agree with the statement, “I am always looking for different cultural experiences and influences that will broaden my horizons.”

**NUANCED MESSAGES**

Brands need multi-level messages that reach both the contemporary and traditional aspect of the individual simultaneously. The newest and shiniest product may appeal to the consumer’s westernized spirit but her more traditional self will seek good value for money.

In the West, holidays often are times for sales promotions. In India, a sale during a festival is unsatisfying unless it’s communicated in a way that’s relevant to the festival. It can be a costly mistake for brands to uncritically rely on strategies that worked in other country markets. To succeed in India brands must understand and find a way to fit in this balancing act between tradition and modernity.

Approaches vary by brand but they generally fall into one of three categories:

1. **INDIVIDUALITY:**
   - Connect the brand with the shift to mindfulness.
   - Presenting the brand as a resolution that reach both the contemporary and traditional aspect of the individual simultaneously.

   Tata Tea takes this last approach. The brand illustrates multi-level communication using the term “awake” and all its implications. It promotes being awake in one’s self, a call for mindfulness that resonates with traditional Indian values. And it uses the term awake to mean being aware of one’s rights.

   These meanings are not contradictory, but rather connect both with the private space of individuals and their public responsibility to the collective welfare. They address the whole person in an integrated way, simultaneously communicating to the self that draws strength and comfort from ancient values and the self that lives in the modern world.

2. **TRADITION:**
   - Reinforce tradition at a time when some Indians worry that rising individuality is among the factors eroding people’s connection to tradition.

3. **BALANCE:**
   - Take a position in the middle presenting the brand as a resolution to the dilemma.

   In other respects, Indian young people could be young people anywhere. They wear the same clothes and listen to similar music. But they’re different from other millennials. Some Indian young people are more westernized; others are more traditional. And most confounding, sometimes the westernized and traditional spirits inhabit the same body.

   This dichotomy of appearance and deeper reality is important for brands to understand because what they see – or what they think they see – is not always what they’ll get. What they get is much richer – consumers who are in step with the world on the outside and grounded on the inside.

**Brands need multi-level messages that reach both the contemporary and traditional aspect of the individual simultaneously. The newest and shiniest product may appeal to the consumer’s westernized spirit but her more traditional self will seek good value for money.**
“India is warm and energetic, moving in all directions all the time.”
Growth, the new imperative, challenges brands to keep up

Strong economy and Brand Power drive record value increase

Growth is the new imperative. As the Indian market became more competitive, seven brands that grew over 20 percent in brand value actually dropped to a lower rank in the BrandZ™ Top 50 Most Valuable Indian Brands. And 8 percent of the brands from the 2014 India Top 50 dropped out of the 2015 ranking completely.

Faster rising brands produced a 33 percent year-on-year increase in the 2015 BrandZ™ India Top 50 brand value, and raised the ranking cutoff to $403 million from $298 million, in 2014. The 33 percent increase exceeds the growth rate of the Global Top 100 for every year since the launch of the Global BrandZ™ rankings a decade ago.

The following recent results add perspective: The 2015 BrandZ™ China Top 50 increased 33 percent in brand value; the BrandZ™ Global 100 improved a healthy 14 percent in 2015; and the BrandZ™ Latam Top 50 declined 4.5 percent in the most recent report. India’s BrandZ™ Latam Top 50 declined 4.5 percent in the most recent report. India’s BrandZ™ Global 100 improved a healthy 14 percent in 2015; and the BrandZ™ Global 100 increased 33 percent in brand value, exceeding the Global Top 100 in brand value growth. Only one category declined in brand value. Motor fuels lost 4 percent in value and brands in the category dropped an average of nine spots in the ranking.

The value of the BrandZ™ India Top 50 may not increase one-third in value every year, but with an expanding economy and sophisticated brand building expertise, the value of the India Top 50 should appreciate at a steady pace for the foreseeable future, across an expanding number of product categories and all brand ownership models.

Financial services leads the India Top 50 in number brands…

With 13 banks and insurance brands in the BrandZ™ India Top 50, the financial services category exceeds all other categories in number of brands represented.

…And in brand value contribution…

The 13 financial services brands in the BrandZ™ India Top 50 produce the greatest brand value contribution by far, 41 percent.

BRAND VALUE GROWS ACROSS CATEGORIES

Brand value also grew significantly across categories. When aggregated into six sectors that broadly represent key consumer-facing industries in India, every sector but one grew in brand value by more than 20 percent, led by the 49 percent increase in financial services. These sectors, in the order of the brand value growth they achieved, include: home and personal care (50 percent), telecom providers (47 percent), and food and drinks (40 percent).

Along with the 41 percent financial services contribution to BrandZ™ India Top 50 total brand value, the other sectors each contributed 12-to-15 percent, except for auto aftermarket, which contributed less. The relatively large brand value contribution of financial services is consistent across the BRIC markets and characterizes the BrandZ™ Global Top 100, as well. The high brand value contribution of auto and FMCG brands, and the absence of technology, are particular to India.

The steady expansion of India’s middle class, and the strong boost in consumer confidence following the elections in May 2014, created the conditions for brand value growth to touch most categories. The fortunes of individual brands, however, depended on their brand building expertise. Although the auto category increased 27 percent in brand value, for example, the six brands in the category experienced varying results.

Two auto brands outperformed the 33 percent brand value rise of the India Top 50. The four-wheeler leader Maruti Suzuki increased a whopping 54 percent in brand value. Hero, a leader in the two-wheeler segment, improved 34 percent in brand value. These brands reenforced themselves by identifying and filling product gaps in the evolving India market.

With well-considered segmentation the sectors each contributed 12-to-15 percent. With well-considered segmentation the sectors each contributed 12-to-15 percent. Category leaders excelled. These brands exceeded the 33 percent Top 50 growth by 10 percent or more: Automaker Maruti Suzuki, Colgate, Lifebuoy, HDFC Life, and Berger paints.

Legacy brands spiked. The three Top Risers and their increases were: Union Bank of India (72 percent), personal care brand Lakmé (69 percent) and Punjab National Bank (49 percent). At the same time, brand value grew across all ownership models. The Nine State Owned Enterprises (SOEs) in the BrandZ™ India Top 50 increased 36 percent in brand value, but 26 private brands, both autonomous brands and brands owned by Indian conglomerates, were close behind with a 33 percent brand value increase.

The 15 multinationals (MNCs) trailed with a brand value rise of 26 percent, a strong result but less than the increase of the India Top 50 overall. Three of the four newcomers that entered the India Top 50 this year were private brands and one was an SOE.

Financial services

Leveraging the trend toward greater social responsibility, Lifebuoy, an affordable soap brand, promoted positive hygiene habits, particularly for children. Regulatory issues may have slowed brand value appreciation of the telecom provider category, which still grew a healthy 23 percent. Expanded Internet use and the availability of low-price mobile handset providers should drive future telecom provider brand value growth. Only one category declined in brand value. Motor fuels lost 4 percent in value and brands in the category dropped an average of nine spots in the ranking.

Innovation and

INNOVATION AND COMMUNICATION GET RESULTS

The brands that excelled in brand building pursued product innovation and connected with consumers in new ways, often through social media. In many categories brands communicated more effectively with women, appealing to their growing sense of empowerment and their financial independence. One popular detergent campaign questioned whether men should share the laundry chore.

Personal care brands responded to rising consumer expectations about brand benefits and a willingness to pay for those benefits. Positioned as an indulgence, Lakmé, the cosmetic and skin care brand, benefited from this premiumization trend, while it also added salons to reach more recently empowered women. At premunization touched other categories, the jewelry brand Tanishq also up scaled some of its offering. Leveraging the trend toward greater social responsibility, lifebuoy, an affordable soap brand, promoted positive hygiene habits, particularly for children. Regulatory issues may have slowed brand value appreciation of the telecom provider category, which still grew a healthy 23 percent. Expanded Internet use and the availability of low-price mobile handset sale providers should drive future telecom provider brand value growth. Only one category declined in brand value. Motor fuels lost 4 percent in value and brands in the category dropped an average of nine spots in the ranking.

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BRANDZ™ TOP 50 MOST VALUABLE INDIAN BRANDS 2015

Source: BrandZ™ Moelis & Company

Financial services

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Financial services
Fast growing e-commerce, mobile brands may soon enter the Top 50

Dynamic categories portend market disruption

The brands in these categories, such as e-commerce leader Flipkart and Micromax, a handset maker, are not only rapidly growing sales and market share, they’re also developing ecosystems that influence consumer purchasing across categories. The brands are attracting billions of dollars from foreign investors and creating new marketing avenues that are uniquely Indian and reach individual consumers anywhere in the country in low-cost, targeted ways.

Investors are betting on these brands because India is one of the world’s largest markets and the one place on earth where five homegrown online marketplaces compete, but none dominates.

Competing with Amazon no doubt sharpened Flipkart, Snapdeal and the other Indian e-commerce players. Flipkart scores higher in Meaningful, Different and Salient in India than China’s Alibaba scores in China and globally. Flipkart scores 248 in Salient (unaided awareness) in India, for example, while Alibaba scores 143 in Salient in China and 142 globally. A score of 100 is average. These three metrics comprise Brand Power, the BrandZ™ measurement of a brand’s ability to grow sales volume and market share.

Competition among Indian brands and Amazon – and now Alibaba – will be fierce, and the surest winner of this face-off will be the mobile phone sector. Over 40 percent of e-commerce purchases in India are made with mobile devices, according to some estimates, compared with less than 35 percent in China, 20 percent in Brazil and below 15 percent in Russia.

Some of the leading Indian smartphone brands – Intex, Karbonn, Lava and Micromax – rapidly moved up a brand development curve. Launched in 1991, Micromax produced low-priced products until Chinese value brands entered the Indian market and undersold Indian brands. Micromax then quickly repositioned as a brand offering quality smartphone performance without the Samsung or Apple premium.

To build that reputation internationally, the brand engaged actor Hugh Jackman as its spokesperson. Micromax has generated significant foreign investment. Over the past five years, Micromax has grown 389 percent in Brand Power. Competition intensified recently when the Chinese brand Xiaomi, which sells its mobile handsets in India, started also assembling them in India.

The inclusion of the leading e-commerce and mobile handset brands in the BrandZ™ Top 50 Most Valuable Indian Brands will broaden the number of categories represented, reflecting the growing diversity of the Indian economy as new upstart brands increase in value and balance the historical brand value contribution of the financial services sector.

The entrance of a powerful brand can dramatically impact a BrandZ™ ranking, as illustrated by Alibaba’s inclusion in the 2015 Global Top 100, following the brand’s IPO. Alibaba immediately rose to the number one rank in the retail category, surpassing Amazon and Walmart in brand value.

### Flipkart outscores Alibaba in Brand Power metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>India</th>
<th>China</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meaningful</td>
<td>165</td>
<td>129</td>
<td>137</td>
</tr>
<tr>
<td>Different</td>
<td>175</td>
<td>150</td>
<td>141</td>
</tr>
<tr>
<td>Salient</td>
<td>248</td>
<td>143</td>
<td>142</td>
</tr>
</tbody>
</table>

Indian e-commerce leader Flipkart scores higher in Meaningful, Different and Salient in India than China’s Alibaba scores in China and globally, in these three metrics that comprise Brand Power.
Brand Power drives value growth across brand ownership models

Indian and Chinese Brand Power varies by ownership

Robust economic growth, increased consumer confidence, and strong Brand Power lifted brand values across all types of brand ownership models, in the BrandZ™ Top 50 Most Valuable Indian Brands 2015.

Each brand ownership model – private, multinational (MNC) and State Owned Enterprise (SOE) – scored relatively high in Brand Power, a BrandZ™ brand equity metric that measures a brand’s ability to grow sales volume and market share.

The nine SOEs in the ranking, mostly banks, led in brand value growth, rising 36 percent. Private Indian brands, which totaled 26, including both brands owned by individuals and those owned by Indian conglomerates, rose 33 percent in brand value. And brand value of the 15 MNC conglomerates, rose 33 percent in brand value.

These results indicate: (1) all types of brands in India, regardless of ownership model, drive brand value growth; and (2) there is a clear correlation between brand value growth and high Brand Power.

Brand Power scores are not only high across ownership models in India, SOEs in the BrandZ™ India Top 50 increased 18 percent in Brand Power and MNCs grew 8 percent, while private brands remained flat. Some of the variations in growth rates may be category related. But they’re also an important window that reveals how brands are evolving in India, and the levers to pull for brand building success.

**LEVERS OF BRAND SUCCESS**

Brand Power scores are derived from three components that indicate how effectively consumers say brands are connecting with them: Meaningful (meeting customer needs and being loved), Different (being unique and setting trends) and Salient (top-of-mind awareness). The increase in SOE Brand Power can be attributed to two of these factors: SOEs increased 10 percent in Salient and 2 percent in Meaningful.

The strong growth in Salient signifies that these SOE brands, mostly in financial services, are well known to consumers. It follows efforts by Indian banks to become more inclusive and accessible, making financial services available for the first time to many people. The SOE improvement in the Meaningful score indicates that SOEs are meeting customer needs, adopting more consumer-centric brand-building attitudes. The growth of mobile, in particular, has enabled banks to establish more personal and useful relationships with consumers.

Both MNCs and private brands increased somewhat in Salient but declined in Meaningful. And MNCs, private brands and SOEs all declined in a third component of brand equity, Different. A decline in Different is not unusual as markets mature and become more crowded with brands that consumers view as similar. Conversely, improvement in Different becomes increasingly important, as customers experience more choice and being Different from the competition in a Meaningful way becomes a determinative factor in purchasing decisions.

**INDIAN AND CHINESE BRAND POWER VARIES BY OWNERSHIP**

Indian MNCs scored 330 in Brand Power, increasing from 305 a year ago. MNCs in China scored only 305 in Brand Power, not much higher than the average Brand Power score for all brands, which is 100.

The special strength of MNCs in India reflects their long-time presence in India and MNC brand building expertise, which has produced some leading brands in a country that most Indians view as indigenous. The Indian government’s success in attracting foreign investment also contributed to the significant MNC presence in India and high Brand Power. Private market-driven brands in India scored 192 in Brand Power, and SOEs scored 166.

In Brand Power Indian brands scored high in each brand ownership model and highest in MNCs.

**Indian SOEs increase most in Brand Power**

The SOEs increased Brand Power 18 percent, while MNCs grew 8 percent and private brands improved more modestly.

<table>
<thead>
<tr>
<th>Component Changes</th>
<th>Change in Brand Power</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MNC (15 Brands)</strong></td>
<td>+8%</td>
</tr>
<tr>
<td>+18%</td>
<td>+0%</td>
</tr>
<tr>
<td><strong>Private (26 Brands)</strong></td>
<td>-4%</td>
</tr>
<tr>
<td><strong>SOE (9 Brands)</strong></td>
<td>+2%</td>
</tr>
</tbody>
</table>

... Indian and Chinese Brand Power varies by ownership

In Brand Power Indian brands scored high in each brand ownership model and highest in MNCs.
Indian consumer trust in brands has grown steadily, a mirror image of the decline in trust that has occurred in most other parts of the world.

Just six years ago, the level of consumer trust in brands was comparable across major country markets. When asked, in 2010, whether they trusted a brand, only 25 percent of consumers responded positively in India, 27 percent in China, 26 percent in the US and 27 percent in the UK.

Indian consumers were on the cusp of a growing fascination with brands, while in other markets consumers were recoiling from the global financial crisis that shook their faith in government, major institutions – and brands, especially in the financial services category.

Subsequently, levels of consumer trust arced upward in India and downward elsewhere. By 2014, 33 percent of Indian consumers expressed trust in brands, compared to 27 percent in China, 25 percent in the US, and 26 percent in the UK.

India is an outlier in trust both for reasons that are particularly Indian and reasons that pertain to the conditions in other parts of the world. First, Indians appreciate brands and the rapidly expanding choice. Second, Indians discharged much of their frustration and distrust of government and large institutions in the 2014 election, when they removed the long-serving Indian National Congress party.

Brands are beneficiaries of the ensuing rise in consumer confidence and optimism. Although India recently experienced a food safety scandal similar to China’s, the reaction of Indian consumers was measured and did not metastasize to other categories.

In addition, the lack of trust in brands in much of the developed world is most fervently directed at banks. Consumers blamed banks for precipitating the global crisis of 2008 and 2009, and they remain critical of banks for not implementing adequate reforms.

Global banks was one of only two categories to decline in brand value in the BrandZ™ Top 100 Most Valuable Global Brands 2015. Luxury was the other category.

Indian banks survived the global financial crisis relatively unscathed. Indian financial services brands improved 49 percent in brand value in the 2015 BrandZ™ India Top 50, leading all categories in brand value growth. Indian brands also scored high in RepZ, the BrandZ™ measurement of brand and corporate reputation. Trust is one component of the RepZ score, which also includes success (strong financial results), fairness (good pricing and practices), and responsibility (positive engagement with employees and society).

The India Top 50 scored 112 in RepZ compared with 108 for the Global Top 50. A score of 100 is average. Indian brands outscored the global brands by a wider margin in the trust component, 110 to 101. Global brands edged past Indian brands only in the success component, 116 to 114.

For brands marketing in India, high consumer trust means that brand messages will reach a receptive audience. Without the need to penetrate through general distrust or skepticism, brands can devote more attention to educating consumers about brand benefits and trying to delight them. It’s important not to abuse the trust Indian consumers place in brands, however. Trust is fragile. It builds over time but crumbles overnight.
India potentially is a model for linking traditional and modern life.
Needs of the growing middle class, and the national agenda drive trends

Cross Category Trends

E-COMMERCE
Online purchasing boom is brand building chance
Like consumers in most markets, Indians are increasingly purchasing online to find wide product range, convenience and transparent pricing. In India, the online range goes well beyond basic apparel and electronics, and includes just about any category available at bricks and mortar locations – even luxury products like jewelry. And Indians have many online marketplaces to choose from, including Flipkart, Snapdeal and Jabong. Along with other Indian-based marketplaces, Amazon has been present in India for about three years and Alibaba arrived during the summer of 2015. Online is booming but it’s just starting. Online is an efficient way to build a brand in a country as large as India.

MOBILE
Innovative communication reaches large audience
Mobile is another instance where India is similar to other markets, but also different. In India, mobile is not just a device for personal communication, it’s part of the national agenda to link the nation and provide more equal access to health care, education and government services. Mobile is particularly suited for reaching the roughly 70 percent of India’s population that lives in rural areas and is not always easily reached with traditional media. In an innovative marketing development, Hindustan Unilever launched its own radio station available through the mobile phone. People can listen to the station free of charge by giving a missed call to a number. Unilever gains customer contact details and can target ads. Banks use mobile to reach the unbanked as well as the new generation customers with apps that combine financial transactions and social messaging.

CORPORATE SOCIAL RESPONSIBILITY
CSR is a requirement, not an elective option
In many western markets Corporate Social Responsibility (CSR) remains the philanthropic giving that appears in the annual report, sometimes as bolted on initiatives disconnected from corporate purpose and strategy. In India, CSR is much more connected to the corporate mission. In the individualistic western tradition, CSR and higher purpose usually are embraced when they serve the primary corporate goal of enhancing shareholder value. In India, with more of a balance between individual and communal welfare, companies are expected to serve not only the interests of their shareholders, but also of the nation. CSR spending isn’t an elective option. The Indian government mandates it. Ultimately, building the nation helps grow shareholder value by creating the wealthier, better educated population necessary for a consumer society.

ENTREPRENEURSHIP
Consumers hospitable to new ideas, brands
It’s not that India hasn’t been known for its entrepreneurs. It’s just that they’ve often lived in Silicon Valley. That’s beginning to change for several reasons. First, what’s more appealing to an entrepreneur than a fast growing market? And no major market currently is growing faster than India. Second, India has always made room for entrepreneurs. More than half of the BrandZ™ India Top 50 brands are privately held, and entrepreneurs launched many of them. About a quarter of the BrandZ™ India Top 50 brands are owned by entrepreneurial Indian family conglomerates with names like Aditya Birla, Bajaj, Bharti, Mahindra, Reliance and Tata.

SEGMETATION
Expanding middle class seeks broader choice
Brands are adding new products to serve more narrowly targeted audiences, as consumers in India’s expanding middle class desire – and can afford – products that fill particular needs or wants. Premiumization is the clearest example of this trend. The personal care brand Lakmé markets specialized skin care products that command a higher price point, for example. Segmenting the market by gender, the two-wheeler maker Hero designed and markets a motorcycle model specifically for woman. To meet the need for time saving convenience as more women enter the workforce, FMCG brands are introducing more ready-mix foods. Some of these products provide traditional Indian dishes without the time consuming preparations. That benefit fills an even more specific need – helping people live in the new India while satisfying their taste for the old India.

INCLUSION
Brands are expected to be agents of social improvement in India
Creating a more inclusive society is a key aspect of India’s national agenda. It primarily means extending greater opportunity to those who have been historically excluded because of poverty, low social status or geographic inaccessibility. But other formerly disenfranchised groups are being embraced, such as the differently-abled. This Indian term itself signals a mentality that’s more progressive in its emphasis on different abilities rather than disabilities. Brands are expected to be agents of social change in India. In this case, progressive advocacy expressed in product offer and communication, can also strengthen customer bonds.
Building brands in India requires deep insight, boldness and speed

1. Be different
   Because India is such a large and hospitable market for brands, it’s rapidly becoming more crowded with brand choice. In this context, it becomes more important for brands to be different from the competition. In the BrandZ™ India Top 50, the Top 25 brands scored 127 in Different, while the Bottom 25 scored 113. An average score is 100, so a score of 113 is good, but perhaps not good enough.

2. Be purposeful
   When a brand has clear purpose consumers feel that it’s in business to help improve their lives – or the world – not just to make money. Important in all markets, purpose is especially important in India. India is like other markets where purpose becomes an important differentiator. But India is different from other markets because consumers expect brands to have a purpose and contribute to the welfare of the nation.

3. Be Indian
   Don’t assume lessons learned in China or any other fast-growing market will apply in quite the same way in India. India is a physically large and remarkably diverse nation of 22 official languages. Interests and tastes can change dramatically by region. To be Indian doesn’t mean imitating what on the surface seems Indian. It requires deep insight, to understand the nuances so thoroughly that consumers view the brand as Indian, regardless of its provenance.

4. Be on the cutting edge of change
   Resist the comfortable. The problem with a normal slice of life ad, for example, is that life in India is changing quickly. The detergent commercial with a woman extolling the brightness of her wash reaches many women viewers who no longer want to do the wash and believe that men should share in the household chores. Advocate for social progress.

5. Identify new niches
   If the size and complication of the India market creates challenges, it also produces opportunities, as people rapidly move into the middle class and discover needs they didn’t know they had. For every person who’s just traded up from a two-wheeler to a car, there’s an owner of an economy car who is looking for a more premium model. Premiumization is just one segmentation trend, but it crosses many categories.
Part 1

Take Aways

Get the media right
Use traditional media when appropriate. But go beyond traditional media. Mobile is important, particularly in rural India where consumers use mobile extensively for entertainment and financial transactions. Banks are linking their financial apps with social media. Over 40 percent of e-commerce in India happens on mobile, according to some reports.

Get the message right
A film star or another celebrity may resonate with some older consumers, but not with their children. Young Indians, compared with young people elsewhere, are more likely to respect traditions. But young Indians reject hypocrisy. They enjoy the comedy networks that specialize in social criticism and they respond to communication that’s smart and to the point.

Protect trust
Indian consumers tend to be more trustful of brands than consumers elsewhere. That means brands can immediately build on trust, while in some other markets brands first need to repair trust. Brands can get right to the fun part – trying to delight consumers – as long as they continue to merit and respect the consumers’ trust.

Keep moving
The BrandZ™ India Top 50 grew 33 percent in brand value, more than the annual growth of the Global Top 100 for every year since the BrandZ™ rankings began a decade ago. Seven brands dropped in ranking this year even though they increased over 20 percent in brand value. A key challenge for brands in India is growing fast enough in such a fast growing market.

Remember the MTS telecom ad where a baby argues with God, refusing to be born to parents who don’t have Wi-Fi in their home? That summarizes how seriously consumers take digital connectivity. It also shows the challenge facing brands to either harness the power of the digital age, and reach consumers creatively at each step of the purchase journey, or be left behind by more adroit competitors.

Old Spice offers a good example of digital sophistication when it leverages its viral videos and answers fan-submitted questions. There are many examples of brands that have made mistakes in the digital age and, one hopes, learned from them. Consider how the eight hours an airline took to respond to a tweeted lost luggage message exposed its customer service failings to thousands of people.

Brands need to be proactive with digital. As consumers shift from awareness to consideration, and then purchase, brands must harness digital media to create authentic customer focused engagement programs. After all, the “7 Ps” of marketing now have an eighth “P” – “Personalization.”

Indians have an expression for it: chalta hai, a resigned acceptance of circumstances, right or wrong. Chalta hai may have defined our past, but it can certainly not define our future. Empowered with social media, consumers have rejected chalta hai. When brands are too lax and don’t deliver they won’t face apathy. Rather, they’ll risk being the target of public outrage.

In a hyper-connected India, while Internet penetration may still be dismal, what certain Indians are doing cannot go unrecognized. From a sarpanch, or village leader, in Haryana inspiring a viral “SelfieWithDaughter” campaign to promote empowerment of girls, to a “celebrity roast” on YouTube gone awry, digital activity is influencing public opinion like never before.

Brands need to tread carefully, since one digital faux pas could be re-tweeted and shared a million times before the day is over. While this threat does not mean brands should become wary of everything they do online, it certainly means that having a consistent tone of voice and quick response time would help build brands in this post-chalta hai digital age.

Our Insights
Our Insights

DIGITAL

Be creative with content to engage consumers

Gaurav Mehta
Media Analytics Executive
Millward Brown
Gaurav.Mehta@millwardbrown.com

Brand success in today’s digital world requires understanding how digital media is different from conventional media and how to use those differences advantageously. Because digital can be more personal and interactive the possibilities for creating engaging content are greater.

The Indian mobile manufacturer Micromax recently demonstrated this potential. The brand launched its Micromax A94 preloaded with an app that incentivized users to watch ads by enabling them to reduce their phone bill with each ad watched. For the launch of this phone, Micromax hosted a contest – AdChorades, where users could win free phones by correctly guessing the ads.

The snack brand Bingo provided another example of creative engagement. In a campaign called “CraziestPlacesToEatBingo” the brand asked customers to submit their ideas for the most unusual places for eating Bingo – on a crowded train, for example. The brand then recognized the best submission by turning the ideas into sketches and posting them online.

It’s important to remember that a creative idea alone is not enough. The content must reinforce the brand message in ways that are relevant to the consumer and consistent with the brand’s values.

SOCIAL MEDIA

Treat social media influencers like high value customers

Mihir Karkare
Research & Associate
Social Wavelength
Mihir.Karkare@socialwavelength.com

Today on social media anyone able to create valuable content with an authentic voice can gather a significant audience, with no cost and zero technical know-how. This phenomenon has resulted in the rise of the social media influencer. They offer an opportunity that brands are underleveraging. Accustomed to thinking of the lifetime value of a customer, brands need to understand that value by the extent to which a social media influencer can create high spenders. Some of these influencers spent only a few hundred rupees a month, but were capable of creating value through their reach and influence

As “platinum customers”, these influencers received phenomenal customer service. The positive messages they shared with their audiences were worth far more than the incremental increase in the service cost. Social media influence is powerful. The caution is that brands must ensure that it’s positive.

Single at 25 plus, is a taboo in India. The family is constantly pressuring these singles to “settle down” and society perceives them as having a problem finding a match. Choosing to ignore this pressure, a growing number of empowered young people are choosing independence over marriage, romance and even children.

Basically, they’re making a positive commitment to long-term lavish singledom. Brands need to acknowledge this development and grow the idea that the family is their exclusive target audience. Brands must also cater to the needs of this new, financially independent audience.

Some brands are taking important first steps to address these needs, which include security, freedom of choice, personal care and affordability. For example, a jewelry brand expanded its line from only “occasion” items to include less expensive merchandise designed to enable young women to express their individuality.

The growing number of dating apps is evidence of the need for companionship without having to put an official seal on the relationship, a development that marketers are leveraging. While this audience of young singles is niche today, it is growing and brands must pursue this opportunity by celebrating the life choices these people make.

EMPOWERMENT
Rising singles market offers new opportunity

Shriya Sengupta
Group Head Planning
Ogilvy & Mather, Mumbai
Shriya.Sengupta@ogilvy.com

It has been a rising trend for Indian brands to expand abroad because it yields a higher return on investment than saturating the diverse and geographically dispersed Indian market.

Moreover, Indian brands often have an upper hand in developing nations because they face mostly local competition. Micromax has smartly entered Africa and Russia and in the process become India’s leading smartphone brand.

Godrej entered Pakistan with its Good Knight brand when category penetration of mosquito repellents even in urban India is relatively low and potential for sales gain is high. Marico’s introduction of its Parachute Hair Oil in Egypt, Bangladesh, South Africa and Vietnam is another example of how valuable Indian brands build international presence even when there’s plenty of growth left at home.

As the Indian middle class rapidly expands and demand for products increases, the challenge for these successful Indian exporters will be gearing up to serve all their potential customers, both at home and abroad.
“Whether in the mall or on a mobile app, Indians spend more time shopping.”
PART 2
Market Intelligence
Key Facts and Figures

Geography

Land Area
(world’s seventh largest nation, about one-third the size of the US)
3.1 million sq. km / 1.2 million sq. mi

Political subdivisions
29 states and 7 territories

Economy

GDP
US$ 1.9 Trillion
(a about equal to Canada)

GDP Rate of Growth
(2014-15)
7.3%

Population

Total population
1.25 billion

Rural population as percent of total population
68%

Population below the poverty line
(2011)
21.9%

Population by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>65 years and over</td>
<td>5.8%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>7.0%</td>
</tr>
<tr>
<td>25-54 years</td>
<td>40.6%</td>
</tr>
<tr>
<td>15-24 years</td>
<td>18.1%</td>
</tr>
<tr>
<td>0-14 years</td>
<td>28.5%</td>
</tr>
</tbody>
</table>

Languages

India’s constitution recognizes 22 languages. Hindi is the official language. Over 40 percent of Indians say Hindi is their first language (2001 census)

Religions

The majority of Indians are Hindu (•) or Muslim (•). Other significantly represented faiths include Christianity, Sikhism, Buddhism and Jainism (•)

Median Age
(2014 estimate)

- 27 yrs
- 30.7 yrs
- 30.7 yrs
- 29.2 yrs
- 37.6 yrs
- 38.9 yrs
- 40.4 yrs

Figures from the World Bank and for 2013 unless otherwise noted. *CIA World Fact Book 2014 estimate. +Government of India
Indians build a modern state on the firm foundations of an ancient civilization

From its independence in 1947 through its first four decades as a sovereign state, and despite some reform attempts, India functioned as a centralized highly regulated economy. By 1991, the country was in political and economic turmoil.

Prime Minister Rajiv Gandhi was assassinated while campaigning for reelection. The country was close to default, unable to pay its foreign debts. India agreed to reform its economy as a condition of a bailout by the International Monetary Fund. In just 25 years, India moved from the brink of bankruptcy to become one of the world’s most dynamic markets. The transformation began when the India National Congress Party won the 1991 election and Prime Minister Narasimha Rao appointed Oxford-educated economist Manmohan Singh as finance minister.

Singh implemented economic reforms and eventually served 10 years as prime minister, from 2004 to 2014. Change happened incrementally, subject to the competing interests of a robust democracy. Frustrated with the pace of change, Indians elected Bharatiya Janata Party candidate Narendra Modi as prime minister in 2014, deposing the Indian National Congress Party, which had governed India almost continuously since 1947.

Modi presented a vision of transformation, opening the country to greater foreign investment and launching programs to build a more inclusive, equitable and technologically advanced society.

In 2014, with GDP growing at an annual rate of 7.5 percent, faster than any other major country, the economy spiked to $2 trillion. It had taken India 60 years to reach $1 trillion, only seven years earlier.

2002
A train fire ignites religious violence that leaves more than 1,000 people dead.

2004
Manmohan Singh becomes prime minister in a Congress Party coalition government called the United Progressive Alliance. A Sikh, he’s the first non-Hindu to hold the post. Economic reform continues, although at a slower pace because some political parties oppose privatization. Thousands die along India’s southern coastline in tidal waves of the tsunami in the Indian Ocean.

2006
India and the US sign a nuclear cooperation agreement during a visit by President George W. Bush.

2007
Pratibha Patil is elected India’s first woman president.

2008
Attacks by Islamist terrorists kill almost 200 people across Mumbai.

India launches an unmanned moon probe, Chandrayaan-1.

2011
India’s population reaches 1.21 billion, according to the census, an increase of 181 million people – or about the population of Nigeria – in just 10 years.

2012
India hosts the fourth annual summit of the BRIC nations.

2013
Four men are sentenced to death for the gang rape of a Delhi student in 2012.

2014
Bharatiya Janata Party candidate Narendra Modi is elected prime minister in a landslide victory.

China President Xi Jinping visits India and announces investment of $35 billion in India over five years. The government announces its Make in India program, encouraging foreign companies to set up manufacturing facilities in India.

2015
Parliament relaxes restrictions on foreign investment in the insurance business, raising the percentage threshold of foreign ownership to 49 percent from 26 percent.

Prime Minister Narendra Modi visits China in an effort to build trust and closer economic ties between the two giant neighbors with a fraught history.

The government launches two initiatives for developing urban India, Smart Cities and AMRUT, Atal Mission for Rejuvenation and Urban Transformation. Smart Cities aims at building 100 new cities, with modern physical and electronic infrastructure, over the next several years, primarily for people expected to move from rural locations. AMRUT focuses on rehabilitating 500 existing cities.

Digital India Week highlights the government’s ambitious connectivity initiatives for harnessing digital technology to build a national electronic network, improve government efficiency and expand access to information.

1991
Finance Minister Manmohan Singh introduces reforms that promote a market-driven economy, more open to both domestic and foreign investment. Singh later serves as prime minister for 10 years, from 2004 to 2014.

1998
India conducts underground nuclear tests, its first since 1974, and draws international criticism and sanctions.

1999
Following optimism about resolving the dispute over Kashmir, the decade ends with India and Pakistan in armed conflict.

2000
As the new Millennium begins, India’s population reaches one billion. With India more open to international engagement, US President Bill Clinton makes an historic visit.

2001
The US lifts economic sanctions imposed on India and Pakistan after nuclear tests in 1998. The Indian government inaugurates the Golden Quadrilateral, a national infrastructure initiative linking over 3,600 miles of modern multilane highways to keep inside of India – a project to connect its major cities. The project is completed in 2012.

2004
Modi presented a vision of transformation, opening the country to greater foreign investment and launching programs to build a more inclusive, equitable and technologically advanced society.

2006
India and the US sign a nuclear cooperation agreement during a visit by President George W. Bush.

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2011
India’s population reaches 1.21 billion, according to the census, an increase of 181 million people – or about the population of Nigeria – in just 10 years.
Brand India is evolving rapidly, like India itself

It potentially can be about global leadership in sustainability

View an Indian street clogged with three-wheel auto rickshaws, motorcycles, luxury cars, women in colorful saris weaving through the traffic on motor scooters and, occasionally, even men at the roadside prodding their water buffalos to keep up the pace. Listen to the incessant tweeting of horns as drivers signal each other. Smell the aromatic spices of the street vendors.

This is Brand India. You can see it, hear it and smell it. Understanding it is more difficult. The cues that work in other markets don’t always apply to India. Sometimes what you think you see isn’t exactly what you get. The women in saris, for example. Are they acting in a traditional role, hurrying to shop for their families or are they newly empowered, hurrying to work at their high tech office jobs? Or both?

The further problem of understanding Brand India is that it isn’t static. It’s changing as fast as India itself. And the measurements of that change usually result in superlatives. Current annual GDP growth of 7.5 percent outpaces all other major economies. India’s population is expected to reach almost 1.5 billion in about a decade when it will surpass China as the world’s most populous nation. The 33 percent year-on-year brand value increase of the BrandZ™ India Top 50 exceeds the growth rate of the Global Top 100 for every year since the rankings were launched a decade ago.

Understanding Brand India—both today and tomorrow—requires getting beyond the surface appearance and the superlatives to distill the essence of what makes India, India. And what distinguishes its products and services from those of other nations. The Brand India of today is about the relative presence of various product categories. The Brand India of tomorrow potentially can be a powerful idea that influences how products are made and marketed worldwide.

DIVERSE AND COMPLICATED

Brand India is already as diverse and complicated as India itself. Brand India in part reflects the country’s past as a 5,000-year-old civilization that has absorbed many cultures, has been governed by successive dynasties, and for over a century was shaped by British colonial rule.

That aspect of Brand India is apparent in the combination of product categories that drove the year-on-year growth of the BrandZ™ India Top 50. Financial services brands increased 49 percent in brand value. Home and personal care categories followed, with 32 percent brand value growth.

The apparent chaos of the street, which can seem like the energy trapped inside an atom, is that raw human potential that exists in all countries and gets tamed or unleashed depending on the government in charge, its ideology, competence and temperament. Almost 70 years after independence, and nearly a quarter of a century since economic liberalization began in 1991, the Indian people, in May 2014, voted for a government with a transformative vision about opening the Indian market further and creating a more prosperous and equitable country—as quickly as possible.

Only in its second year, the government has already introduced many programs to advance this agenda by creating new cities with state-of-the-art infrastructure and digital networks (Smart Cities), and by expanding education, health care and government services more broadly (Digital India). Most significantly for brands, the government launched a program to encourage companies to make and sell their products in India (Make in India).

EXPORTING AN IDEA

As Brand India evolves it initially will be understood differently according to market. In emerging markets, India may continue to be the provider of reliable, good-quality, lower cost products such as mobile handsets, motorcycles and entry-level cars. In many markets, the reputation for Ayurvedic remedies and other practices and products with specifically Indian characteristics will persist. Mankind’s recognition of the first International Day of Yoga, established as a worldwide event by the UN.

Ultimately, Brand India can be associated with a broader range of products. Products in India are already made by brands that are indigenous to India and private; brands that are state-owned; and brands of major multinationals with deep roots in the country. With initiatives like Made in India, this diversity is likely to increase and the global influence of Brand India should expand.

Brand India potentially could be linked with the way products are made. Brand India could signify a particular mentality, a way of living in the modern world in a meaningful and sustainable way. And every brand that makes a product in India would be influenced by the Indian way of thinking and doing. Every product potentially would be produced more mindfully and with greater regard for the customer and also for the wider community and, ultimately, the world.

Brands that engage in India and take on those attributes of Brand India could become better brands, imbued with the higher purpose that consumers increasingly expect. This Brand India could become one of India’s most influential exports.
Ancient civilization transforms into a modern state

There is not an Indian Dream in the sense that there is an American Dream, an animating idea that defined the nation at its birth and continues to inspire and steer its growth. India was born in the Indus Valley over 5,000 years ago. It’s less than 250 years since the American idea that defined the nation at its birth and continues to inspire and steer its growth. India's decades as a young state have been spent building a national identity that could articulate not only what Indians opposed, but also the values they espoused and how they could achieve them.

Jawaharlal Nehru, India’s first prime minister, spoke prophetically. “The future is not one of ease or resting… The service of India means the service of the millions who suffer. It means the ending of poverty and ignorance and disease and inequality of opportunity.”

That dream has been a work in process. It’s pursued more effectively today than in almost any time during India’s decades as a young state, struggling through political upheavals and violent episodes, and dealing with the practical challenges that come with nationhood and freedom.

**EVOLUTION OF THE DREAM**

As a young socialist republic in the 1950s, the government’s priorities advanced a domestic agenda aimed at creating greater equality and helping people meet their basic necessities. Internationally, the country remained officially neutral during the Cold War.

The 1960s opened with a border war with China and a subsequent change in national leadership. India experienced difficult economic hardship during the decade, including food shortages that prompted mass migration from villages to the cities.

The government of Prime Minister Indira Gandhi nationalized banks in the 1970s and, ultimately, consolidated power with a two-year state of emergency that led to disillusionment about the possibility of achieving an Indian Dream.

Rajiv Gandhi became prime minister after his mother’s assassination. In the 1980s, he attempted to restore national pride, advancing the notion of India as a world technology leader. But at the time he was assassinated, in 1991, India’s economy was close to defaulting on its international financial obligations.

Subsequently, the government loosened its control of the economy. Economic and social liberalization unfolded in parallel, weakening the caste system, removing barriers for self-improvement and opening the possibility that how far you travel in life is not completely determined by where you begin the journey.

**NEW POSSIBILITIES**

Liberalization made possible the realization of a personal Indian Dream. The personal dreams of people everywhere, the personal Indian Dream is about achieving a good life for oneself and one’s family. A more particularly Indian aspect of this dream is its collective nature, the sense that individuals are responsible both for their own and their family’s wellbeing, along with the wellbeing of their extended family and the wider community.

There’s also a national Indian Dream, to be a modern state, prosperous and inclusive at home and respected and influential abroad, and also to be a model for how to enjoy the material benefits of the modern world and build a country that’s confident and powerful, but informed and balanced by the perspective of ancient traditions and spirituality.

A national dream and the personal dreams of a nation’s people can be aligned, or not. (Please see The Power and Potential of the Chinese Dream at www.brandz.com.) Americans believe that by pursuing their personal dreams they’re helping America achieve its national dream of freedom and opportunity for all. In America, personal and national dreams exist in harmony. In contrast, the personal and national Chinese Dreams are slightly discordant. Both dreams extol personal and family wellbeing. But the national dream adds the government goal of national greatness.

The personal and national dreams of India seem to exist more like the personal and national American Dreams, with the national agenda flowing from personal aspirations. The modern Indian state has evolved to a time when more individuals feel that realizing their personal dreams is possible. And the government intends to help empower them. Every personal dream realized brings India closer to achieving the national dream.

Prime Minister Narendra Modi, who himself began life as a tea seller, personifies the possibilities. In his view, impoverished Indians will not be raised up by government programs alone, but by themselves with help from business and brands and from the government, as it removes barriers and makes opportunity more equally and widely available.

In India today there are 1.3 billion Indians, individuals who can be part of the Indian Dream. Now, over five millennia since settlements appeared in the Indus Valley, and almost seven decades since independence, Indians seek the same India as Mahatma Gandhi... “An India, in which there shall be no high cast and low class of people, an India in which all communities shall live in perfect harmony... Women will enjoy the same rights as men... This is the India of my dreams.”

Free and empowered people build their lives and the nation
IN A NATION OF SHOPKEEPER ENTREPRENEURS,

CONSUMERS UNDERSTAND AND APPRECIATE BRANDS.
Changing attitudes will impact brands

Indian consumers are changing. That much is clear from the May 2014 election result when voters elected Bharatiya Janata Party candidate Narendra Modi as prime minister, deposing the Indian National Congress party, which had governed India almost continuously since the country’s independence in 1947.

But how are Indian consumers changing and what do the changes mean for brand building? The Futures Company examines these questions in its Global MONITOR, a perpetually updated resource for consumer and social trends and insights across 24 countries. Especially important, The Futures Company found that Indians today feel more empowered. In a notable shift, almost three quarters of Indians surveyed in 2014 agreed with the statement, “I feel I can make a difference to the world around me through the choices I make and the actions I take.” Less than two-thirds agreed with the statement just a year earlier.

Indians feel empowered…

Indians feel that their choices can make a difference, and their choices about personal health and healthy foods, for example, will impact brands.

<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>I actively take steps to improve my health regardless of whether I feel ill</td>
<td>43</td>
<td>54</td>
</tr>
<tr>
<td>Extremely/very important in your personal life today: Buying only ethically produced goods</td>
<td>59</td>
<td>74</td>
</tr>
<tr>
<td>I feel I can make a difference to the world around me through the choices I make and the actions I take</td>
<td>56</td>
<td>63</td>
</tr>
<tr>
<td>Extremely/very important in your personal life today: Buying locally grown or made products</td>
<td>64</td>
<td>73</td>
</tr>
<tr>
<td>I suffer from stress</td>
<td>43</td>
<td>36</td>
</tr>
</tbody>
</table>

Source: Global MONITOR 2014/The Futures Company

…Indian attitudes are changing…

Indian attitudes are changing about the kind of society they want to live in and their responsibilities for creating that society.

<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stability vs. Change</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>Community vs. Individual</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>India vs. World</td>
<td>49%</td>
<td>57%</td>
</tr>
<tr>
<td>India vs. Community</td>
<td>49%</td>
<td>57%</td>
</tr>
<tr>
<td>% choosing stability</td>
<td>51%</td>
<td>61%</td>
</tr>
<tr>
<td>% choosing community</td>
<td>57%</td>
<td>61%</td>
</tr>
<tr>
<td>% choosing India</td>
<td>55%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: Global MONITOR 2014/The Futures Company

…Indians are optimistic about finances

Indian consumers are optimistic both about their country’s finances and their own.

<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>% saying country’s finances are going well</td>
<td>37%</td>
<td>57%</td>
</tr>
<tr>
<td>% saying personal finances are going well</td>
<td>52%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Source: Global MONITOR 2014/The Futures Company
Digital India is more than the sum of its parts, however. The term Digital India has brand power. It articulates the vision of Prime Minister Narendra Modi and his government to transform India into a modern, even model, nation using digital technology as the primary enabler.

As an individual known for his respect for tradition, leading a nation that takes great pride in its ancient heritage, Modi can credibly argue for progress that doesn’t threaten Indian civilization but rather helps sustain it into the future. The future is arriving quickly, however, and Modi’s government has much to accomplish because India has been a nation struggling with inadequate infrastructure serving a population with a wide disparity of income, education and opportunity. Ironically, inadequate infrastructure may prove to be an advantage. It frees India from contending with legacy systems that retard digital advancement in some highly developed western nations. India can potentially leapfrog from infrastructure deficiency to state-of-the-art.

One of the key initiatives, called BharatNet, will create a fiber optic network connecting 250,000 villages. The scope of this project, and its difficult logistics, high costs and deadline challenges, indicate both the enormity of the government’s vision and the difficulties in accomplishing it. The Indian government will not be alone in advancing its grand ambition, however. The Digital India vision drew immediate support from the United Nations when it was formally announced during Digital India Week in July 2015.

And Digital India is expected to inspire increased foreign and local investment by industries and entrepreneurs. It complements and strengthens the Make in India program that the government launched in September 2014 to encourage international companies to establish manufacturing facilities in India.
India plans to create 100 cities of the future

Soon after his election as prime minister, Narendra Modi announced one of his most ambitious initiatives, the development of smart cities. The government intends to meet the needs of the country’s burgeoning population and economy by creating a total of about 100 cities with well-functioning infrastructure and services. The program envisions retrofitting existing cities with the latest smart technology and building completely new ones.

Urban life has characterized the rise of civilization for perhaps 7,000 years, since the city of Sumer appeared in the fertile land between the Tigris and Euphrates rivers. In announcing his smart cities program, Modi noted that today’s rivers are concrete highways and tomorrow’s will be optical fiber.

The planned cities will be scattered throughout India to accommodate an urban population that’s expected to reach almost 600 million by 2030, according to some estimates, as the economy shifts away from its agrarian roots and cities offer new employment opportunities. Many of the smart cities will be located in the corridor connecting Mumbai and Delhi, and some will include special economic zones.

The transformation of farmland and countryside into vast urban conurbations with special economic zones sounds like the dynamics rapidly transforming China. But India isn’t China. In India, democratic process and competing interests make progress slower and more tedious to achieve.

In addition, Indians live in the tension between modernity and tradition. They’d welcome less traffic congestion and well-designed buildings with state-of-the-art energy systems and flawless plumbing. But they’re not inclined to gain these amenities by simply bulldozing over the past.

Indian Internet users totaled 269 million in June 2015, according to the Internet and Mobile Association of India (IAMAI). That’s almost the same number of Internet users as the US but only about one-fifth of India’s population, which indicates the market’s huge potential.

In fact, the number of Indian Internet users, which grew from just 7 million in 2001, is projected to reach 380 million in 2016. IAMAI concluded in a recent report. Most significantly, the composition of the new Internet users will come predominantly from small towns and rural India. Users will be older, more female and more likely to access the Internet with a mobile device and communicate in Hindi or a local language.

The report predicts that India’s Internet economy could reach $200 billion, or 5 percent of GDP, by 2020. The implications for brands across categories are enormous. India’s E-commerce business is in its infancy, totaling just $13.5 billion in 2014, according to IAMAI and the Indian Market Research Bureau (IMRB).

India has lagged behind much of the world in Internet penetration until now. Many factors are expected to drive rapid Internet expansion, including entrepreneurial activity by brands and the availability of low-cost smart phones. But the greatest enabler may be the investment being made by the Indian government.

To bridge India’s urban-rural divide and provide the electronic infrastructure required for a digitally empowered economy, the government of India launched the National Optical Fibre Network (NOFN) in 2011, to connect 250,000 villages with fiber optic cable by 2016.

To implement the project, NOFN, now called BharatNet, the government set up a special agency, the Bharat Broadband Network Limited (BBNL). When it’s completed, the broadband network is expected to provide even India’s smallest villages with greater access to online commerce, education, health care and government services.

The question is when the enormous project will be completed. Execution has been slower than planned and over budget. In a revised and accelerated schedule, BharatNet expects to rollout optical fiber to 50,000 villages by December 2015.

To bridge India’s urban-rural divide and provide the electronic infrastructure
Indian e-commerce totaled $13.5 billion at the end of December 2014, according to the Internet and Mobile Association of India (IAMAI) and the Indian Market Research Bureau (IMRB).

Researchers expect e-commerce to grow 33 percent during 2015, having grown over 50 percent during 2014. IAMAI predicts that this pace of growth will continue over the next few years, and Indian e-commerce consumption will reach $75 billion by 2018.

The factors driving the torrid growth rate of Indian e-commerce include expanding Internet access and rapid adoption of technology, especially mobile devices. The rise in business confidence, which followed the election of the current government, also attracted greater investment in e-commerce.

Apart from the traditional online formats of retail and lifestyle, newer online business segments such as classifieds, real estate, grocery and healthcare received funding. Two domestic online shopping sites – Flipkart and Snapdeal – especially benefited from increased investment and the growth of e-commerce.

The Indian government’s Digital India project and the modernization of India Post are expected to drive e-commerce growth too, as they expand Internet and broadband to remote parts the country, enabling people to connect socially and commercially with their mobile devices.

The potential is enormous, as only 16 percent of India’s population was online in 2014, and only a small proportion of that group, 14 percent or about 28 million people, were online buyers, according to IAMAI.

E-commerce is increasingly attracting customers from Tier 2 and 3 cities, where people have limited access to brands but high aspirations. These cities have experienced 30-to-50 percent increases in transactions, according to some estimates.

Increased smartphone use is expanding Internet access. In 2013, only 5 percent of e-commerce transactions were made with a mobile device. Today, more than 13 percent of all e-commerce transactions happen via mobile. However, most mobile transactions so far are for entertainment, such as booking movie tickets and music downloads. This trend is expected to change quickly with more and more merchandise being ordered online.

## Leading E-commerce Brands in India

### Indian Brands

- **2007**: Flipkart began as an online bookstore and today is a purveyor of products across multiple categories.
- **2009**: Fashionandyou began by offering collections from leading designers. It has become a prominent fashion apparel brand.
- **2010**: Snapdeal is an online marketplace offering products across multiple categories.
- **2012**: Jabong.com caters to the fashion needs of men, women, and children with a range of footwear, apparel, jewelry, and accessories.

### Multinational Brands

- **2005**: Online marketplace giant eBay is sharpening its focus on the fashion and lifestyle segments in India.
- **2013**: The US brand continues to expand in India, establishing ties with local small businesses to improve the online shopping experience.
- **2015**: Alibaba, the Chinese online marketplace, will begin selling in India during 2015, in an arrangement with the Indian online firm Paytm.
They look like millennials anywhere, but respect for tradition makes them different.
Indian and import brands fight for share in growing market

Total mobile phone shipments reached 257 million in 2014, according to CyberMedia Research, and almost 30 percent of the shipped devices were smartphones.

Factors driving growth included the availability of a wide range of low-price phone models, the growth of online sales, an increase in mobile data consumption and aggressive expansion of telecom networks, especially into remote rural areas. Total wireless subscribers reached over 973 million in April 2015, according to the Telecom Regulatory Authority of India.

Many new players, especially Chinese competitors, entered the Indian mobile device market in 2014. Market leaders include Samsung, the South Korean-based brand, India’s Micromax and Karbonn, China’s Xiaomi, and Motorola and Microsoft (Nokia) from the US.

For many Indian consumers, the mobile phone — both smartphones and feature phones — has become their second most watched screen after TV, according to recent research. Indian consumers are expected to download nine billion apps in 2015, five times more than in 2012, according to a recent study.

Leading Mobile Device Brands in India

<table>
<thead>
<tr>
<th>Brand</th>
<th>Country of Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intex</td>
<td>India</td>
</tr>
<tr>
<td>Karbonn</td>
<td>India</td>
</tr>
<tr>
<td>Lava</td>
<td>India</td>
</tr>
<tr>
<td>Micromax</td>
<td>India</td>
</tr>
<tr>
<td>Microsoft</td>
<td>US</td>
</tr>
<tr>
<td>Motorola</td>
<td>US</td>
</tr>
<tr>
<td>Samsung</td>
<td>South Korea</td>
</tr>
<tr>
<td>Xiaomi</td>
<td>China</td>
</tr>
</tbody>
</table>

Rural users double in only one year

The number of social media users in India reached 143 million in April 2015, according to a report by the Internet and Mobile Association of India (IAMAI) and the Indian Market Research Bureau (IMRB).

Social media activity in rural India doubled to 25 million users in just one year, while social media activity among the urban population continued to rise at a steady pace, increasing 35 percent to 118 million users in 2014.

India’s top four cities – Mumbai, Delhi, Bangalore and Hyderabad – generated almost half of the country’s urban social media activity, the study found. And 60 percent of urban social media use came from college students and young men.

College students and young men accounted for the majority of social media use overall, 34 percent and 27 percent, respectively, followed by school children, 12 percent. And 61 percent of all social media users accessed the Internet with a mobile device.

The report also found that the three most common social media activities, in order of popularity, are maintaining a profile, updating status and commenting on a blog.

India’s estimated 100 million active monthly users make it the second largest market for Facebook. Around 30 million Indians reportedly use Twitter.
Digital leads in spending pace, but TV dominates

Annual investment in digital continues to outpace all other media by far in India, although cinema also is growing rapidly and healthy spending on TV advertising keeps it the market share leader.

Total media spending continues to rise...

Total media spending in India increased an estimated 12.7 percent in 2014 to 435.5 billion rupees ($7.7 billion), according to GroupM, part of WPP. GroupM predicts investment will continue to rise by about the same rate and end 2015 with total media spending of about 490.5 billion rupees ($8.7 billion).

Digital spending increased an estimated 35 percent in 2014, and is predicted to expand by 37 percent this year. Despite the sharp growth rate, digital still accounts for relatively low market share, projected to be just below 10 percent in 2015. In contrast, TV is expected to reach almost 46 percent market share in 2015.

Investment in TV continues to grow, although not at the robust pace of digital, and TV remains the screen viewed most by Indians, although they are often simultaneously on a mobile device viewing or texting. TV spending is estimated to increase 15.1 percent and 16.0 percent, respectively, for 2014 and 2015.

Digital spending increased an estimated 35 percent in 2014, and is predicted to expand to 37 percent this year. Over five years, spending on digital more than tripled, while total media spending increased 47 percent.

Spending on cinema advertising continues to enjoy strong growth, and is predicted to increase 20 percent in 2015 on top of a 25.4 percent rise estimated for 2014. The increase reflects the place of film viewing in Indian culture and the strength of India’s film industry. The rise in digital, cinema and TV spending came primarily at the expense of print, especially magazines, with spending expected to decline 4 percent in 2015 after falling 5 percent last year. Spending on all other media is expected to increase in 2015. Radio and retail are expected to improve 11 percent and 8 percent respectively. Newspapers, and out-of-home should rise more modestly.

But TV dominates in market share

TV is expected to reach almost 46 percent market share in 2015, as investment in TV continues to grow, although not at the robust pace of digital.
Our Insights

E-COMMERCE

Key tactics move consumers from shopping to purchase

Shradha Jadhav
Account Director
Millward Brown
Shradha.Jadhav@millwardbrown.com

Shopping is an unquenchable craving for many. Online shopping has almost become an addiction for quite a few, especially for those who live in major cities and own a smart phone. Some satisfy the thirst for shopping by selecting many items online and leaving them in the cart; some also indulge in “showrooming,” shopping a physical store but purchasing online.

Physical stores across most categories have taken a hit from the major e-commerce brands like Myntra, Jabong, Amazon and Flipkart, which often offer huge discounts. And of course, online shopping has advantages other than price, including convenience, flexibility of shopping and researching anytime and anywhere.

But whether a brand operates physical or virtual stores – or both, the key challenges are getting the shopper to your brand and then moving the shopper along from research and browsing to purchasing. Here are four simple tactics to nudge shoppers along the path to purchase:

- Set frequent reminders via SMS: Have you forgotten any items?
- Create buzz: Big discounts on must-have products.
- Show savings: Item was this price; now that price, 40 percent off.
- Be generous: Give additional coupon discounts with minimum purchase.

INCLUSIVITY

Empathy and effort wins hearts, minds and loyalty

Sheryl Roche
Senior Account Executive
Ogilvy & Mather
Sheryl.Roche@ogilvy.com

We Indians are famously jugaadu. Perhaps it was the lack of resources that we, as a culture, grappled with in the past that triggered our resourcefulness and enabled us to make the best use of what we have around.

One such device that has presented unprecedented resourcefulness to us is the mobile phone.

You step into a small town and all around you will see new businesses that the mobile phone has created or visibly augmented. You can now have a “missed-call” auto wala at your disposal, an auto rickshaw driver who can be summoned with a missed call signal, for which the caller isn’t charged.

Twenty-five million consumers in India are differently-abled, according to the 2011 census. Yet, regrettably, most brands do not see these people as part of the mainstream culture and communicated in ways that fostered empowerment not dependency.

Some brands are leading the change. Taco Bell provides menus in braille. Viviana Mall in Mumbai is equipped with audio-tactile labels. Inox Cinemas have wheelchair ramps and Macbook’s VoiceOver feature makes the computer universally accessible.

An empathetic view and a little effort can go a long way in winning the hearts and minds – and purchasing power – of differently-abled people.

Entrepreneurialism

Mobile enables Indian youth to be bold

Aditi Jain
Account Planning Manager
J. Walter Thompson
Aditi.Jain@jwt.com

We Indians are famously jugaadu. Perhaps it was the lack of resources that we, as a culture, grappled with in the past that triggered our resourcefulness and enabled us to make the best use of what we have around. One such device that has presented unprecedented resourcefulness to us is the mobile phone.

Mainstream finally has competition in India. The Internet is empowering a counterculture. You may say it’s just two tweets of fame but actually the Internet is enabling young talent to come into their own and connect with young people across the country.

Thanks to the Internet, independent films like Lunchbox, Ship of Theseus and Court, have gained a strong following among young people. This is not Bollywood. Music festivals like NH7, Weekend, buoyed by the Internet, are expanding and showcasing Indian talent across diverse genres of music (read non-tinsel town). Groups like AIB and TVF are ushering in not just a different take on comedy, but are also questioning the norm.

Youth brands need to be bold enough to walk down this less trod counterculture path. A brand that connects with youth by embracing the counterculture stands to gain a lot. Not only will it get noticed and talked about, but it also can become the “badge brand” that the youth likes to be associated with.

Inclusivity

Empathy and effort wins hearts, minds and loyalty

Sheryl Roche
Senior Account Executive
Ogilvy & Mather
Sheryl.Roche@ogilvy.com

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Indian consumers are increasingly involved in multitasking, driving an unprecedented growth of multi-screening on media. According to Millward Brown’s AdReaction 2014 report, Indians spend on average around 162 minutes and 95 minutes per day, respectively, accessing smartphones and laptops, and 96 minutes watching TV. Additionally, Indians multi-screen 91 minutes of their 95 minutes of TV viewing time, and 39 percent of people media mesh, texting while watching a video, for example.

Marketers recognize the importance of multiscreen campaigns, but most are not really investing in this area. A report from the US-based Association of National Advertisers predicts that half of all marketers will spend on multiscreeen campaigns in next three years, compared with only 20 percent today. More importantly, 88 percent of marketers, compared with 48 percent today, will advocate using multiscreen. While marketers are aware of the need to optimize investments for maximum impact this does not reflect in their media choices. Millward Brown’s ClicksMedia’s studies of brands in India suggest that while TV is an effective medium, marketers waste precious resources on it by allocating money to campaigns delivering much higher frequencies than optimum. The same money invested on other media could have delivered a better impact on brand KPIs.

The usual focus in this interaction is the product. But the context has to be larger than just the product to connect the target audience with the brand. A meaningful and purposeful connection between brand and consumer depends on relevant content. Consumers engage only with content that is personally relevant to them, their purpose, and their passions. E-commerce players like Mynta, Jabong, and American Swan, for example, are already engaging with their consumers about fashion by creating look-books, blogger events, fashion shows and celebrity associations. This new consumer desire for relevant content affects purchasing behavior. Brands can leverage evolved e-commerce platforms and transform the traditional “path to purchase” journey to “path to purpose” in this evolved world of omnichannel retailing.

Relevant content connects purpose to purchase

Warish Jain
Senior Research Executive
Millward Brown
Warish-Jain@millwardbrown.com

Aparna Jain
Planning Director
Ogilvy & Mather
Aparna.Jain@ogilvy.com

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With financial and social empowerment comes personal responsibility. However, urban Indians seem to be recklessly enjoying their newfound empowerment—no holds barred. This is seen in the indulgences and over-indulgences of various kinds, which are reflected in rising lifestyle diseases, drunken driving, substance abuse among the youth and road rage to name just a few examples.

But real empowerment will come when we as a country can enjoy it without abusing it.

What signifies success for this increasingly young and virtual generation? Is it the size of the bank account or the length of the car? Ostentatious displays of success and status are a social no-no, of course. No one really “likes” the “pics” of the your new sedan or your check-ins at the international airport. Been there, done that, boring.

To the young generation, success is not the “monetary capital” you’ve accumulated, it’s talk-worthy “social capital.” You display. A Turkey vacation after reading Oman Pamuk, capturing the Byzantine mosques gives you a lot more social currency than the mandatory “pic” in front of Big Ben in London. You have backpacked in Europe away from the tourist circuit and posted about hidden gems largely unknown to the rest of the world. You have an interesting life and your social bank balance just went up.

Everyone’s vacations in Goa on a long weekend, but driving there, and exploring coastal cuisines on the way, gets you real social currency, measured in likes, hearts, shares and the number of conversations you can carry off. In this virtual-vicarious world, the corner office may no longer be the most aspirational goal. In running to reach it, you might run out of social currency.

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“Time seems to move differently in India, both forward and backward simultaneously.”
PART 3

Thought Leadership
Thought Leadership: Brand India

Brands need to tap the core strengths of their “Indianness” for global success

Beyond exotic, Indian brands excel in customization and service

In recent years a handful of Indian clothing, accessories and jewelry brands have been gaining traction in global markets by flaunting their “Indianness” to woo customers. You have jewelry brands like Amrapali and Gitanjali Gems Ltd. introducing to new markets traditional Indian designs like the maang tikka hair ornaments and kamarband chains for the waist. These designs are now being sported on runways and red carpets.

Even cosmetics entrepreneur Shahnaz Hussain relies on the same formula with her beauty products claiming, “We are trying to sell a whole civilization in our jars.”

BEYOND “INDIANNESSE”

To compete effectively outside of India, however, it is not enough to exploit our “Indianness.” Relying on it may not always be sustainable and will relegate those kinds of products to a limited customer segment that has a transient fascination with our culture.

Apart from the software industry where brands like Infosys, TCS and Tech Mahindra have begun attracting global clients, other industries still have a strong case to make for themselves. We need to go beyond offering just cultural ideas to more commercial ones and we have to work hard to create relevance within all our products in other markets. What can make a brand work at home may be totally irrelevant abroad and emotional pillars that our brands stand on at home will not necessarily support growth in other countries.

SOME EARLY BRAND MOVERS

Nalini Siks: with branches in Singapore and California, expanded its collection beyond just sarees to include a wide selection of scarves and stoles. Their California store even has a tailoring and consultancy service within to cater to all audiences.

In its stores in Italy, Mauritius, Malaysia, the UAE and other markets, Fab India carries European sizes and avoids fabrics that need hand-washing, as hand-washing is not common in other markets. Styling also changes by market and varies according to season, while still maintaining the core “Indianness” of fabric and overall look. Fab India has even launched a brand called Fabels, which is a western style line that competes with other foreign labels.

Another brand that doesn’t even use the “exotic origin” route, Hidesign has a dozen stores across the world – in its stores in Italy, Mauritius, Malaysia, the UAE and other markets, Fab India carries European sizes and avoids fabrics that need hand washing, as hand washing is not common in other markets. Styling also changes by market and varies according to season, while still maintaining the core “Indianness” of fabric and overall look. Fab India has even launched a brand called Fabels, which is a western style line that competes with other foreign labels.

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Over the years we Indians have prided ourselves on exhibiting India in a slightly storybook light. An ancient culture of royalty, mysticism and Ayurveda are some of the labels we have been proud to associate ourselves with.

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Thought Leadership: Beyond Villages

Government and brands both play important roles reaching remote areas and improving lives

Innovative government and FMCG programs raise the standards for rural marketing

In a vibrant market like India, where a whopping 73 percent of households are rural, successful brands have a steadfast focus on reaching the last mile to ensure that their messages resonate even in the most remote parts of the country. While FMCG behemoths such as Hindustan Unilever have taken the lead on market segmentation, the Indian government is not far behind. As Unilever is looking at newer geographies and consumer clusters to reach rural audiences, the government is now reaching deeper into India, to tiny taluks, tehsils and mandals, the sub-divisions of villages.

This movement to empower rural India includes a broad mix of ministries, multinational conglomerates, non-profit organizations and celebrities. Together they are advancing a wide range of social improvement initiatives, ranging from health and nutrition to education, women’s empowerment, and even entertainment. Many of these initiatives have achieved best practice status, breaking conventional barriers throughout the length and breadth of the country to empower even those at the farthest edge.

GOVERNMENT AND UN SUPPORT PROGRAMS

Recently, popular actress Priyanka Chopra, in her capacity as the UN Goodwill Ambassador, highlighted the issue of anemic adolescents in central India, in places like Bhopal in the state of Madhya Pradesh. Although adolescent anemia is a major public health problem in India, this is the first concerted effort to address it. The government launched a program in 2012 and UNICEF added its support in every Indian state and union territory, targeting over 100 million adolescents. The program, implemented through schools and Anganwadis, village community centers, provides weekly dietary supplements to young school children.

India’s Ministry of Health and Family Welfare recently launched a routine immunization program in 201 priority districts, providing vaccines against seven deadly diseases. The program intends to immunize 90 percent of infants by 2020. Only 65 percent of Indian children receive complete vaccination during their first year. This leaves a substantial proportion of children exposed to deadly diseases that can be prevented. This deficiency can be attributed to lack of information and awareness, and a level of apprehension among parents. A blend of traditional media exposure and digital communication, with strong on-the-ground mobilization efforts are driving this initiative.

BRANDS PARTICIPATE AND INNOVATE

Innovation is the cornerstone when it comes to rural empowerment. Multinational companies are exploring new ways to reach consumers in remote areas of the country to improve their lives in various ways. With its award winning innovation, the Kan Khajura Tesan, an on-demand mobile entertainment channel that integrates the medium of radio with mobile phones, Unilever reached eight million consumers in eight months. An idea, which stemmed from the simple insight of using mobile technologies in media dark areas, has provided 700 million minutes of entertainment to rural consumers with brand messages being heard 425 million times in a span of 15 months.

Other notable initiatives that have effectively reached rural India include, Oral Health Month by Colgate-Palmolive Indial. The initiative developed after the International Market Research Bureau’s (IMRB) Consumer Usage Attitude Study found that a mere 2.5 percent of Indians visit a dentist at least once a year compared to a global average of 48 percent. Colgate embarked on a universal dental coverage project. In collaboration, the Indian Dental Association and Colgate launched Oral Health Month. This initiative included advertising, public relations and on-ground activations ensuring consumers could get free dental check-ups in more than 1,300 cities and towns with over 35,000 participating dentists.

With the Indian economy growing at a healthy pace, the writing on the wall is clear: rural consumers and rural development will help lift the economy even higher. Brands, companies and governments alike have recognized the power of traveling deep into the rural nooks and corners of urban India to empower the untapped population and recruit new consumers. In the near future, we might see consumer brands learning a lesson or two about rural outreach from the Government of India. The need is large enough to benefit from the investment and creativity of both the public and private sectors.

Genesis Burson-Marsteller is a leading public relations and public affairs consultancy that delivers integrated communication services to some of the best global and Indian companies. Our focus is on creating real measurable impact on our client’s business through evidence based, ideas driven and result oriented campaigns.

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Thought Leadership: Brand Experience

Today’s thriving brands build great experiences by putting the customer in the driver’s seat

Interactive, responsive and resilient brands earn customer loyalty

This wouldn’t have been the cause of too many sleepless nights had the twain not met through the all-consuming tidal wave of wondrous technological possibilities. That genie is well and truly out of the bottle and we are now living in a world where the largest provider of hospitality accommodations doesn’t own a single hotel room and the most talked about public transportation company doesn’t own a single taxi.

THE EXPERIENCE OF THE BRAND IS THE BRAND

At Brand Union we have a singular belief: The experience of the brand is the brand. Behind this is a strong conviction that successful brands make a lasting imprint as a result of continual, positive moments of interaction. It is the brands that build coherent thought-through experiences that are truly interactive, responsive and, most importantly – authentic. These experiences earn love and respect. Think of the brand as engaged in a life-long relationship with the customer. After wooing your partner you must then live up to his or her expectations, then embrace change to exceed them and finally make your partner feel part of something bigger than a transaction. Critically, as in all strong relationships, power isn’t hoarded, it is earned and it is shared.

Think communities like Uber, where drivers and customers both rate each other to create self-regulation, with minimum interference by the service provider. Think mobile companies offering unlimited data with no throttle and the ability for subscribers to solve their own queries digitally. Think airlines allowing modular flight experiences such as business class food in economy at an additional price or lower cost business tickets if you don’t want food. These are all examples of platform thinking and that’s the philosophy that tomorrow’s power brands are acting upon today.

Here are a few more examples of how the Indian customer is warming up to platform thinking. The Idea Internet Network (IIN) of Ideal Cellular appeals to young people with its clever premise of finding freedom and empowerment to young people with its clever premise of finding freedom and empowerment with a mobile phone. With the IndusInd Video Branch program bank customers can use a mobile phone to connect by video with their bank brand manager. The budget airline IndiGo connects by video with their bank brand manager. The budget airline IndiGo customers can use a mobile phone to connect by video with their bank brand manager. The budget airline IndiGo customers can use a mobile phone to connect by video with their bank brand manager. The budget airline IndiGo

In fact, given the customer’s quest for authenticity, the role of the marketing department should not only be to strengthen external perception but to mold an internal culture that breeds innovation and platform thinking. Today, more than ever, a brand is an embodiment of the culture that produces it. Or, as Peter Drucker elegantly put it, “Culture eats strategy for breakfast.”

So, to wipe the frown off the faces in the c-suite and create vaunted growth and value for the brand, marketing departments must ask themselves if they are creating a culture of platform thinking within the company, how connected they are to the rest of the organization and how much they manage to influence the eventual customer experience.

While it is challenging, it is also the defining moment for the brand to be the central organizing principle that propels the organization forward. Repeat after me – change is not the enemy.

Part 3 | The India Top 50 - Thought Leadership

Ambrish Chaudhry
Regional Strategy Director
South and South East Asia
Brand Union
Ambrish.Chaudhry@brandunion.com

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IF THEY CHOOSE TO MARRY AT ALL.

WHO THEY MARRY WILL BE THEIR CHOICE.
The number of Indians online is enormous, but small if compared with the potential.

Brands need to supplement TV with practical digital channels.

But India is a nation of big numbers. We talk about India as a nation of a billion people. When we do that, we’re rounding down – and the remainder that we’re ignoring is roughly the entire population of the USA. Against this backdrop of abundant humanity, digital penetration numbers suddenly start to look positively dainty. Certainly, when it comes to reaching young, professional, and wealthy Indians – which many brands want to do – digital channels are powerful.

Mass brands, however, can’t operate in the rarified air of the top of the pyramid. They have to get down into the scrum; they have to communicate with hundreds of millions of potential customers. So are mass brands stuck with television in India?

DIGITAL THINKING FOR NON-DIGITAL CHANNELS

While we like to focus on the innovation, visual appeal, and Internet culture of today’s digital channels, the digital revolution in marketing is more than the sum of its distribution outlets. Going digital has forced us to fundamentally change our thinking. Some of what we’ve learned is new:

• Your brand belongs to consumers, not to you (because they’re much better at informing each other about it than you are at informing them).
• Consumers create “ephemeral art” (ie. content trends) much more effectively than brands do.
• Attention has become a scarce, and thus nearly priceless resource. Context, more than content, is king.

On the other hand, a lot of what we’ve learned is actually quite old. It turns out that customers like being treated as individuals. They are curious, and want to know more about the products they buy. And, while brands are less trustworthy than friends and family, each brand does have a zone in which it is trusted. We trust Apple when it comes to design, and Cadbury when it comes to joy.

The trick, then, is to combine these insights, and find new (or old) ways to deliver them to India’s mass audience. How can we customize experiences? How can we answer curiosity? How do we provide great content? How do we do all these things – classically the realm of digital – for an audience that isn’t online?

THE FUTURE, ROOTED IN THE NOW

Here’s another big number: 900 million mobile subscriptions (representing roughly 700 million mobile customers). That’s a number big enough for any mass brand. And most of those (about 85 to 90 percent depending on the source) are feature phones. Indian feature phone users are surprisingly mature in their usage, despite not belonging to the smartphone ecosystems that the rest of us take for granted.

They expect to use those feature phones for banking, texting, checking the weather, listening to music, watching videos, and, yes, interacting with brands. In the poorest areas of India, where even radio can be a challenge, automated phone systems. We’ve encountered platforms like Rocketalk, which serves content and brand channels to users for whom Facebook is a thing distantly heard of.

It’s time for mass brands to supplement the megaphone of TV with the relevance and personalization of digital thinking – served across practical, innovative channels.

In fact, it’s already started. In recent work we’ve done with a client, we’ve explored the power of automated, voice-navigated phone systems. We’ve encountered platforms like Rocketalk, which serves content and brand channels to users for whom Facebook is a thing distantly heard of.

The numbers can seem magical, if not outright overwhelming: 100 Million active monthly Facebook users – the second largest user base in the world; 30 Million Twitter users. Out of every eight people on Linkedin, one is from India. New platforms are exploding across the nation. WhatsApp has massive penetration. There are reports, admittedly generous, that 200 Million Indians are using Instagram. These are numbers straight out of the hungry fever dreams of marketers and media planners.
Thought Leadership: E-commerce

E-commerce is growing rapidly, overcoming barriers to reaching consumers in rural areas

Leading brands and India Post partner on delivery and payment innovations

E-commerce is one of the fastest growing sectors in the world. It has been embraced by both the public and the government to drive economic growth and job creation. One of the key challenges for e-commerce companies is reaching consumers in rural areas where internet penetration is low. However, with the help of strategic partnerships, e-commerce companies are overcoming these barriers.

In the past decade, India’s population has crossed 1.25 billion. The 356 million youth aged 10-24 make India the youngest nation in the world. Indian youth are coming of age at a time when Internet and mobile technology are taking their biggest leaps yet. However, growing evidence points to the capabilities of digital media going beyond building brand awareness and advocacy and taking concrete steps towards driving sales.

According to the latest report by the Internet and Mobile Association of India (IAMAI) and the Indian Market Research Bureau (IMRB), the e-commerce industry in India reached a value of INR 81.525 crores (USD $13.5 Billion) in 2014. However, the real story was online retail, which reached INR 3.7 billion in 2014, a 65 percent increase over 2013.

Most e-tailing players in India have latched onto offering large scale discounts as a quick and effective means of attracting new shoppers to their sites. Massive online flash sales have become the norm. The benchmark of the flash sales was set last year around Diwali when the top three players – Amazon, Flipkart, and Snapdeal – spent about INR 200 crores ($10.6 million) to attract festive shoppers through advertising. The ‘Big Billion Day’, sale by Flipkart recorded a Gross Merchandise Value (GMV) of INR 600 crores ($31.8 million) sold in 10 hours with Snapdeal recording a GMV of INR 1 crore ($160 million) every minute as well.

E-commerce is experiencing its newest growth from Tier 2 and Tier 3 cities in India. This growth is unsurprising as people here have limited access to brands but high aspirations. According to several e-tailers these cities have seen a 30-50 percent rise in transactions. A pilot project run by Snapdeal into the rural market revealed that while the average ticket size of purchase in urban India was about INR 2000 ($31.50), rural was not far behind averaging at INR 1400 ($22.10) per ticket. While the potential for growth of e-commerce in rural markets exists, there are two key hindrances for growth:

1. Delivery options: A geographically vast rural India is spread out among small cities, towns, townships and villages. This calls for a delivery network that can reach these places. Many traditional delivery methods such as Indian post and local hawkers are used in rural areas. In the past few years, logistics companies have started experimenting with rural distribution models.

2. Payment mechanisms: E-commerce for urban customers with access to Internet banking payment is just a matter of a few taps on the phone, however a majority of rural India would depend on the COD (Cash on Delivery) system.

CREATIVE SOLUTIONS

The current hindrances faced by the e-commerce industry are small when compared with the potential for growth. Various online retailers are finding inspiring solutions to establish presence in areas that have low Internet penetration.

For example, Snapdeal recently partnered with FINO Paytech, a company that stands for financial inclusion of all sectors. Through this partnership kiosks are being planned in 70,000 rural areas by the end of this year. These kiosks will be manned by village level entrepreneurs and will serve as order and delivery centers. The potential of these offline kiosks also extends into low-income households in slums in all the major metros.

With 154,866 offices and 466,903 employees, India Post has emerged as the unlikely hero to turn Rural India to Digital India. With 90 percent of all post offices located in rural areas and with each office being able to serve 21.2 square kilometres (8.2 square miles), India Post almost seems like a tailor-made solution for e-tailers in India.

Several e-commerce players like Snapdeal, Flipkart, and Naaptol have already partnered with India Post. An official statement by a government official mentioned that India Post collected over INR 280 crores ($44.4 million) from customers and remitted these funds to e-commerce firms as part of their COD solutions.

Besides its wide network, India Post has another dormant asset that can revive due to e-commerce. This is its cash handling services, which include competencies like core banking services, money transfers and postal account systems. Forward thinking e-tailers are already exploring setting up e-commerce kiosks inside post offices, while other entrepreneurs have managed to convince India Post to set up booking counters on their premises.

While, business, delivery and payment models are being tried and tested, a digitalized India is ready to trigger an explosion of e-commerce in India. It won’t be long till we get back our nostalgic sense of excitement upon seeing that khaki clad postman smiling at the door.
Women leverage their household decision-making experience to pursue new family and personal goals.

Brands need to respect and connect with this new empowered spirit.

As brands attempt to succeed in the vast and complicated Indian market, it’s important to consider the views of someone who is in many households fondly called the “finance minister.”

In a traditional Indian family, the lady of the house is given a monthly budget, which she is responsible for prudently stretching across essentials (items replenished every month), value adds (premium food products for the children, for example), occasional indulgences (such as beauty care) and gifts (the festive season must-haves).

Women adopt savvy strategies to manage their household finances smoothly. Many of these strategies are discreet and important for brands to understand and take into consideration. To mention just three:

1. Women have a “secret pocket” or hiding place where they save money for personal needs or family emergencies.
2. They keep an ear to the ground to extract value when prices rise. Instead of buying vegetables from the nearby vendor, for example, they’ll shift to buying from the wholesale market, or mandi, which sells cheaper produce but at a faraway location.
3. Women will collaborate to gain economies of scale by buying bulk quantities of high-quality farm fresh staples like rice, wheat, lentils and oil and sharing across five or six households.

As women become more empowered, they’re adopting these savvy household management strategies to more aspects of their lives. And interestingly, we notice that in their new manifestations, the strategies are no longer discreet and covert, but refreshingly candid, according to the J. Walter Thompson Sonar Survey on “What Women Want,” which examined the attitudes of middle-class Indian, Chinese and Indonesian women ages 20-45.

EXPANDED DECISION MAKING

Women believe they are the decision makers across a range of products, the J. Walter Thompson survey found. We asked, “In your household, who would make the final decision about which product or service you were going to buy?” And 70 percent of women replied that they would be the decision-maker for these products and services: home appliances, mobile phones and smartphones, and bank accounts.

Over half of the women indicated that they’d be the primary decision maker for life insurance and travel purchases. In China and Indonesia the figure is higher, over 70 percent.

The expanded decision-making role is linked to easier access to information and being better informed. Our survey revealed that over 55 percent of women across Asia do pre-purchase research using a variety of digital and non-digital resources. The top five resources are: search engines (like Google), recommendations from friends/family colleagues, price comparison websites, brand/company websites and advertising, in-store demonstrations and product sampling also contribute to decision-making.

NEW ASPIRATIONS

As women adopt their household budget strategies outside the home, they retain the prudence that characterized their management of household budgets. We asked, “Imagine for a moment that you were given $350 (in local currency) what would you do with it?” Generally, Asian women would invest the money, or save it for a rainy day. But the story does not stop at saving and sacrifice. There is another chapter.

There is a new and refreshing bold articulation of financial aspiration among Asian women. Over 40 percent of women have larger goals like financial independence, career advancement, and international travel. Half the women in Indonesia want to open their own business!

When asked, “What was the most expensive item you purchased for yourself?” women answered: jewelry, cars, laptops, and smartphones; with average spending of $656 in India, $880 in Indonesia and $967 in China.

In sum, the household “finance minister” is better informed today and more empowered. She’s applying her prudent family budgeting, investment and saving strategies to personal financial goals and purchases. As the J. Walter Thompson Future 100 report concludes, “Feminism is being rebooted in the digital era across all generations, with a newly collaborative, open and empowered spirit.”

Brand initiatives need to connect with this spirit and champion these new overt financial goals. Brands that provide savvy and timely enablers so that these goals can be realized will forge a long-term connection with women audiences.
Indian men struggle as empowerment of women impacts ideals of masculinity

Traditionally, the Indian male was celebrated as a hero. Being the breadwinner and the sole decision maker, he was the dream child of the ideal Indian household. Initiated into manhood by his father, the Indian male earned the rights of passage through a male and wore masculinity like a crown. Symbols of masculinity, like chest hair, beard and aggression were accessories for the Indian male who ruled on his own terms through the mid 90’s. However, the classical definition of masculinity has undergone a sea change with the disruption of Indian society that accompanied economic liberalization. As women become independent and the social power balance equalizes, men are different.

The rise of the metro sexual man was perhaps the first sign of changing Indian masculinity. Receiving the rights of passage from mothers rather than from fathers, members of this generation of men were more open to their feminine sides. They exercise proper grooming and exhibit sensitivity, ideas unknown to the stereotypical Indian man. Luw’s commercial of Indian movie star Shahrukh Khan bathing himself in flower petals set the stepping stone for the booming male grooming market. Male grooming has moved beyond the essentials of shaving and after shaves and has rapidly moved into oil control face wash, skin lightening creams and body washes. Men today have a personal preference when it comes to personal grooming and the market today is flooded with a multitude of grooming options. There is an increasing desire among men to look good, and while brands are doing a good job of satisfying the need, multiple avenues have opened up for the beauty conscious man. The rise in cosmetic procedures for men is testimony to this change. Contrary to the popular belief that only women would go to any extent to look beautiful, the last few years have seen a boom in men’s aesthetic surgery.

A GLOBAL TEND
The changes in India mirror a global trend. According to American Society of Aesthetic Plastic Surgery, the number of men seeking cosmetic procedures almost doubled between 1997 and 2013. Looking good is increasingly becoming important for men as procedures like rhinoplasty, body contouring and hair restoration gain traction. Besides cosmetic treatments, men are also now discovering salons and spas. Pampering oneself and beauty binging, once a territory for women, has competition from men, who can now opt for exotic facials, hair spas and pedicures.

The idea of the “beautiful man” is quite a transition from the times of “tall, dark and handsome” and has changed male imagery. Masculinity in today’s time is no longer about the rigid rules of the alpha male. The modern Indian male is sensitive and prone to show his emotions. Crying, in earlier times considered a sign of weakness for men, is now being accepted and promoted in our society. As more women become bread earners and challenge the gender equation in India, the classical role of the Indian male comes under the scanner. The rise of “femvertising,” advertising that empowers women, has competition from men, is now being accepted and promoted in our society. As more women become bread earners and challenge the gender equation in India, the classical role of the Indian male comes under the scanner. The rise of “femvertising,” advertising that empowers women, has competition from men, is now being accepted and promoted in our society.

BRANDS ADJUST TO CHANGE
The old definition of masculinity has given way to a new definition. In the view of some, this new man is not only well-groomed but also well behaved and in danger of being reduced to a sidekick. Within this tension between the old definition of masculinity and anxieties surrounding the new definition, brands are looking for ways to help clarify the meaning of manhood and provide appropriate product and messages. Some brands, like Raymond, the apparel maker, have adjusted their messages to fit the new definition of masculinity. Similarly, in the clever “Women Against Lazy Stubble” campaign, Gillette engages women to persuade their men to shave more often. Brands like Garnier Men, Fair & Handsome and Nivea Men also design products and messages around the new definition of Indian masculinity.

A few brands also see the flip side to this increasing pressure on the Indian male to be a man. With the recent shift in power and position, men are feeling more vulnerable than ever before. Cast into a new social role, they find the shift hard to take and hence are leading unsettled lives, trying to find their personal identity in the tension between the old and new ideals of masculinity. Many feel dominated by women and are searching within for the lost codes of masculinity. It is no surprise that biker clubs continue to thrive, as well as physically exhausting contact sports like football and even the ancient game Kabaddi. There is an immense opportunity for brands to understand the sensibilities of the Indian man struggling to define what it means to be a self-confident male in a society where the playing field includes men and women engaging as equals.
More Indian women today take journeys seeking self-discovery and greater fulfillment

Brands need to understand this quest or they probably will be left behind

Roughly one year ago, a little Hindi film called Queen brought us face to face with a phenomenon that defines today’s contemporary urban Indian woman. The main character’s journey of self-discovery, her desire for personal fulfillment and courage to challenge traditional society, has important implications for brands.

The film tells the story of a young, naive girl who travels to Europe alone after being jilted at the altar and, in the process, transforms into an independent, self-sufficient woman. However, the most remarkable thing present in this journey, interestingly, is a critical absence: Queen has no king. Not even a prince. Only a knave, and a pale one at that.

You may ask why this is important. Well, examine the context: in a country ostensibly entering a golden era, discussions of how skewed this nation is against women (societally, culturally, politically and even economically) are commonplace. The national capital has unofficially been declared unsafe for women. Gender ratios in education and employment are ridiculously lopsided. And yet, within this everyday quagmire, the modern Indian woman has – quietly, imperceptibly, but exhilaratingly – decided to reclaim hegemony on the one thing that matters most to her; herself. Queen depicts this in a simple and clear way – and becomes one of the most important films in recent Indian cinema.

Increasingly, women are traveling to be with themselves, where the physical journey is both an outward manifestation of and an aid to an inward journey. Women are just picking up their bags, laptops and cameras and embarking to destinations with varying degrees of exotica and quaintness, all the way from Dharamshala to Cambodia. There are only two conditions – there should be no companion. This is not a wanderlust, per se. The need for exploration and adventure here trumps the need to simply travel. For the geographical journey itself, ultimately, is secondary – the real journey lies within. This is a relatively new trend and while in its infancy when it comes to its pop culture depiction, it is already apparent that there are three major aspects that define this new trend:

1. There’s no need for a man in the journey of self-discovery
   Who needs a man to go anywhere? In fact, who needs anyone? More than the destination, the key aspect here is the company of oneself. Interestingly, the objectives behind the solitary confinement that prisons impose and the solitary expeditions we go on are similar: to use the time and focus that solitude brings to explore the self. Having the support (or the distraction) of a man not only hampers the process, but brings in another contender to share the credit for your growth.

2. It’s not outward rebellion, just gentle negotiation for respect and self-identity
   Gaining independence, confidence or self-awareness is rarely about big, grandiose moments for all the world to see. However, that doesn’t mean it is not significant. In reality, the narratives of such transformations are comprised of small, intimate moments, but they matter most – ourselves.

3. There’s no instant personality overhaul, just a gradual assertion of the self
   By the end of Queen it is undeniable that the protagonist Rani has changed. However, it is not a drastic personality overhaul – she remains the same person she was in scene one. Her characteristics, idiosyncrasies and quirks do not undergo any major transformations. After all, going on such journeys only to change as a person would be defeating the purpose. The idea is to become what you are, inhabit what is more-or-less your current personality, only more fully. Over time, Rani too comes into fullloom, gaining confidence and maturity and an ability to handle everybody – her parents, her ex-fiancé and his parents – without fear or fluster. And what makes it all special is that she does all of that without becoming a different person – just a more confident, assured version of herself.

MARKETING IMPLICATIONS

The implications for the travel industry are broad. It travels companies, security apps or even information-providing travel apps. Mainstream, non-travel brands too are exploring this phenomenon. We saw glimpses of this in the Levi’s “Go Forth” campaign about empowering young people. Examples of these journeys appear in commercials from brands like Maggi, Vodafone, Nikon and Woodland shoes. And there’s the ad for Titan watches where a young woman, unperturbed by her girlfriend dusting her, sets out on a girl trip with her mam. Going forward, a great shift in focus is required from brands. Until now, brands talking to women have focused on the external relationships, and external gratifications, becoming a better daughter, wife, mother or housewife. Perhaps now it’s time that brands started focusing on the most integral, internal relationship she has – with herself.

The ultimate gratification conventionally is the happy outcome that results from building strong external relationships. Queen is almost a study in the opposite – how an unfortunate outcome of an external relationship led to a far stronger internal relationship – and it depicts how strongly this unconventional thought connects with the modern urban Indian woman.

Clearly, self-discovery (and traveling to attain it), is becoming increasingly passionate topics for women. Today, any brand that talks to women must not ignore the process or the importance of self-discovery (and possibly a journey as its physical manifestation). Like they say, sometimes you have to go far to come closer to yourself.
INDIANS ARE RISING INTO THE MIDDLE CLASS.

BUT SOME MORE QUICKLY THAN OTHERS.
PART 4

50
The India Top
### BrandZ™ Top 50 Most Valuable Indian Brands 2015

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<tbody>
<tr>
<td>1. HDFC Bank</td>
<td>12,577</td>
<td>9,425</td>
<td>33%</td>
<td>0</td>
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<tr>
<td>2. Jio</td>
<td>11,039</td>
<td>8,217</td>
<td>34%</td>
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<tr>
<td>3. State Bank of India</td>
<td>9,374</td>
<td>6,828</td>
<td>37%</td>
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<td>4. ICICI Bank</td>
<td>5,122</td>
<td>3,536</td>
<td>45%</td>
<td>0</td>
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<tr>
<td>5. asianpaints</td>
<td>3,867</td>
<td>2,812</td>
<td>38%</td>
<td>1</td>
<td>4</td>
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<tr>
<td>6. BAJAJ Dairy products</td>
<td>3,345</td>
<td>3,034</td>
<td>10%</td>
<td>-1</td>
<td>3</td>
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<tr>
<td>7. Hero</td>
<td>2,907</td>
<td>2,164</td>
<td>34%</td>
<td>0</td>
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<td>8. AXIS BANK</td>
<td>2,494</td>
<td>NEW ENTRY</td>
<td></td>
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<tr>
<td>9. kotak</td>
<td>2,394</td>
<td>1,721</td>
<td>39%</td>
<td>0</td>
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<tr>
<td>10. Automobiles</td>
<td>2,318</td>
<td>1,510</td>
<td>54%</td>
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<td>11. Idea</td>
<td>1,981</td>
<td>1,882</td>
<td>5%</td>
<td>-3</td>
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<tr>
<td>12. Castrol</td>
<td>1,773</td>
<td>1,264</td>
<td>40%</td>
<td>3</td>
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<tr>
<td>13. Indusindus Bank</td>
<td>1,542</td>
<td>1,059</td>
<td>46%</td>
<td>6</td>
<td>3</td>
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<tr>
<td>14. McDonalds</td>
<td>1,516</td>
<td>1,395</td>
<td>9%</td>
<td>-1</td>
<td>4</td>
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<tr>
<td>15. Nestle</td>
<td>1,498</td>
<td>1,228</td>
<td>22%</td>
<td>-1</td>
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<tr>
<td>16. Indian Oil</td>
<td>1,436</td>
<td>1,498</td>
<td>-4%</td>
<td>-4</td>
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<tr>
<td>17. Kingfisher</td>
<td>1,374</td>
<td>1,545</td>
<td>2%</td>
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<td>3</td>
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<tr>
<td>18. Mahindra</td>
<td>1,304</td>
<td>1,196</td>
<td>9%</td>
<td>-1</td>
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<tr>
<td>19. Active Wheel</td>
<td>1,301</td>
<td>982</td>
<td>32%</td>
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<tr>
<td>20. Food and Dairy</td>
<td>1,263</td>
<td>879</td>
<td>44%</td>
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<tr>
<td>21. Jewelry</td>
<td>1,240</td>
<td>880</td>
<td>41%</td>
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<tr>
<td>22. Banks</td>
<td>1,230</td>
<td>764</td>
<td>61%</td>
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<td>23. Reliance</td>
<td>1,224</td>
<td>1,636</td>
<td>-25%</td>
<td>-13</td>
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<tr>
<td>24. Food and Dairy</td>
<td>1,217</td>
<td>1,018</td>
<td>20%</td>
<td>-4</td>
<td>4</td>
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<tr>
<td>25. Personal Care</td>
<td>1,177</td>
<td>907</td>
<td>30%</td>
<td>-3</td>
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</tr>
</tbody>
</table>

*The Brand Value of Indian Oil, HP and Bharat Petroleum includes only their retail business. Source: Millward Brown (including data from BrandZ™ and Bloomberg). Brand Contribution measures the influence of brand alone on financial value, on a scale of 1 to 5, 5 highest.

### BrandZ™ Top 50 Most Valuable Indian Brands 2015

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<tbody>
<tr>
<td>1. Colgate</td>
<td>1,070</td>
<td>742</td>
<td>44%</td>
<td>2</td>
<td>3</td>
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<tr>
<td>2. Surf Excel</td>
<td>1,041</td>
<td>778</td>
<td>34%</td>
<td>-2</td>
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<tr>
<td>3. Brooke Bond</td>
<td>904</td>
<td>641</td>
<td>41%</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>4. Food and Dairy</td>
<td>816</td>
<td>754</td>
<td>8%</td>
<td>-2</td>
<td>2</td>
</tr>
<tr>
<td>5. Food and Dairy</td>
<td>770</td>
<td>1,127</td>
<td>-32%</td>
<td>-12</td>
<td>4</td>
</tr>
<tr>
<td>6. Personal Care</td>
<td>759</td>
<td>511</td>
<td>49%</td>
<td>4</td>
<td>3</td>
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<tr>
<td>7. Personal Care</td>
<td>712</td>
<td>570</td>
<td>25%</td>
<td>-2</td>
<td>3</td>
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<tr>
<td>8. Personal Care</td>
<td>704</td>
<td>520</td>
<td>35%</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>9. Personal Care</td>
<td>654</td>
<td>491</td>
<td>33%</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Personal Care</td>
<td>648</td>
<td>451</td>
<td>44%</td>
<td>2</td>
<td>5</td>
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<tr>
<td>11. Food and Dairy</td>
<td>630</td>
<td>NEW ENTRY</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>12. Food and Dairy</td>
<td>598</td>
<td>450</td>
<td>33%</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>13. Personal Care</td>
<td>532</td>
<td>416</td>
<td>28%</td>
<td>0</td>
<td>3</td>
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<tr>
<td>14. Personal Care</td>
<td>518</td>
<td>372</td>
<td>39%</td>
<td>-3</td>
<td>1</td>
</tr>
<tr>
<td>15. Personal Care</td>
<td>517</td>
<td>552</td>
<td>-6%</td>
<td>-11</td>
<td>2</td>
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<tr>
<td>16. Automobiles</td>
<td>2,494</td>
<td>NEW ENTRY</td>
<td></td>
<td></td>
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<tr>
<td>17. Tires</td>
<td>630</td>
<td>NEW ENTRY</td>
<td></td>
<td>4</td>
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<tr>
<td>18. Food and Dairy</td>
<td>598</td>
<td>450</td>
<td>33%</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>19. Banks</td>
<td>532</td>
<td>416</td>
<td>28%</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>20. Insurance</td>
<td>531</td>
<td>367</td>
<td>45%</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>21. Automobiles</td>
<td>520</td>
<td>569</td>
<td>-8%</td>
<td>-10</td>
<td>1</td>
</tr>
<tr>
<td>22. Insurance</td>
<td>518</td>
<td>372</td>
<td>39%</td>
<td>-1</td>
<td>2</td>
</tr>
<tr>
<td>23. Alcohol</td>
<td>517</td>
<td>552</td>
<td>-6%</td>
<td>-11</td>
<td>2</td>
</tr>
<tr>
<td>24. Personal Care</td>
<td>502</td>
<td>297</td>
<td>69%</td>
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<td>5</td>
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<td>25. Motor Fuels</td>
<td>489</td>
<td>539</td>
<td>-9%</td>
<td>-12</td>
<td>3</td>
</tr>
<tr>
<td>26. Banks</td>
<td>469</td>
<td>273</td>
<td>72%</td>
<td>1</td>
<td>2</td>
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<tr>
<td>27. Food and Dairy</td>
<td>468</td>
<td>328</td>
<td>43%</td>
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<tr>
<td>28. Home Care</td>
<td>418</td>
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<td>38%</td>
<td>-4</td>
<td>4</td>
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<tr>
<td>29. Motor Fuels</td>
<td>409</td>
<td>393</td>
<td>4%</td>
<td>-9</td>
<td>2</td>
</tr>
<tr>
<td>30. Automobiles</td>
<td>403</td>
<td>NEW ENTRY</td>
<td></td>
<td>1</td>
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</tbody>
</table>

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India Top 50 score well in brand equity metrics

The BrandZ™ India Top 50 brands are generally comparable to Global Top 50 in all of the BrandZ™ metrics that comprise brand equity — Meaningful, Different and Salient.

The India Top 50 and Global Top 50 diverged somewhat in three BrandZ™ measurements of competitive advantage that are driven by strong brand equity — Brand Premium, Brand Power and Brand Potential.

Brands in the India and global rankings are roughly equal in their ability to command a Premium, which means that an average Indian brand has been able to demonstrate that they are Different in some meaningful way from their competition.

In Brand Power, a measurement of a brand’s ability to win sales and market share, the India Top 50 significantly outscored the Global Top 50, reflecting the salience, or top-of-mind awareness, that the India Top 50 enjoy in India. In contrast, the scores for global brands are averaged across the many country markets in which they compete.

The multi-market presence can work to the advantage of global brands because it adds brand building experience that helps drive the Potential score, which is somewhat higher for the global brands than for brands in the India ranking. With more limited brand building experience, brands in India overall have been less effective in leveraging their strong Premium and Brand Power scores in ways that assure future success.

An analysis of the BrandZ™ Top 100 Most Valuable Global Brands over the past 10 years revealed a group of success drivers, including Brand Purpose, Brand Proposition, Innovation and Love. These drivers also present challenges to the future success of brands in India.

Finally, a story about RepZ, a BrandZ™ measurement of corporate and brand reputation, analyzes reputation in India. Important worldwide because of the erosion of consumer trust in brands and large institutions, reputation is an especially relevant topic in India. Indian consumers expect brands to participate in the national effort to build a more prosperous and equitable society. Brands in India generate higher trust than brands worldwide. Similarly, the India Top 50 brands scored well in RepZ, although there’s room for improvement.
Unique methodology assesses brand equity and competitive possibilities

BrandZ™ measures brand equity with three primary metrics that assess how consumers view brands as Different (unique or trend setting), Meaningful (meeting needs and inspiring love) and Salient (being top of mind).

BrandZ™ key brand equity metrics

BrandZ™ measures brand equity with three primary metrics. Combinations of these metrics drive three attributes that produce competitive advantage: Brand Premium (the consumer willingness to pay more for perceived value), which yields a higher margin; Brand Power (the consumer predisposition to choose a brand and drive sales volume); and Brand Potential (the sustainability of Brand Premium and Brand Power over time).

This multi-faceted consumer view of brands results in Brand Contribution, which is the influence of brand alone, excluding any other factors, on future earnings.

Different, the perception that a brand is unique or trend-setting, is an important driver of brand value and Premium, the consumer’s willingness to pay for perceived uniqueness and consequently improve the brand’s profit margin.

A recent analysis of the BrandZ™ Top 100 Most Valuable Global Brands found that brands viewed as most Different grew 124 percent in Brand Value over a decade, while brands viewed as less Different increased only 24 percent.

Some of the India Top 50 brands substantially surpassed the average Different score, however they did not match the top scoring global leaders. The leading brands from India in Different, and their scores, are Kingfisher beer (201), State Bank of India (182) and McDowell’s, an alcohol brand (174). Leading the global brands in Different are Apple (238), IKEA (218) and Pampers (179).

BRAND IMPLICATIONS

It’s an unusual accomplishment for a financial institution, like State Bank of India, to achieve a high Different score. The presence of two alcohol brands, Kingfisher and McDowell’s, indicates the importance of being special in your category.

These successes suggest that in most categories brands from India have an opportunity to strengthen competitive advantage by being Different.

The BrandZ™ India Top 50 brands scored 120 in being Different compared with a score of 122 for the BrandZ™ Global Top 50, indicating that brands in the India ranking are comparable to the global brands in the Different metric.
Brands in India are comparable to global brands in being Salient. The India Top 50 achieved an average Salient score of 131 compared with a score of 130 for the Global Top 50. Salient (being well known and top-of-mind) drives sales volume and market share.

India Top 50 brands match global brands in being Salient

The strong Salient score for the India Top 50 reflects strength in the Indian market. The India Top 50 leaders in Salient and their scores are: Fair & Lovely, a personal care brand (246), Colgate (245) and the lubricant Castrol (236). These scores are comparable to, or exceed, the scores of global leaders in Salient: Coca-Cola (248), McDonald’s (228) and Facebook (195). The India Top 50 Salient scores are based on consumer responses in India. The global scores include consumer responses in all the countries where these brands compete.

Meaningful scores should help brands in India command a Premium, especially if they can improve their Different scores so that consumers see the brands as different from the competition in Meaningful ways. The diversity of the Indian brands with high Meaningful scores suggests that brands across categories can achieve this advantage.

Indian personal care brand Fair & Lovely scored highest in Meaningful (206) followed by Kingfisher beer (203) and the lubricant brand Castrol (201). In contrast, the top three global leaders in being seen as Meaningful are Facebook (166), FedEx (164) and Colgate (160).

These results demonstrate the success brands in India have achieved in being perceived as Meaningful in the Indian market. For the global brands, achieving high Meaningful scores across multiple country markets presents a challenge.
ARE CHANGING WITH THE EMPOWERMENT OF WOMEN.

DEEPLY ROOTED INDIAN IDEALS OF Masculinity
Brands in India enjoy strength today, but face challenges in changing market

The India Top 50 brands are well positioned in the Indian market today. They generally enjoy strong brand equity, which means that Indian consumers see these brands, in varying degrees, as Meaningfully Different and Salient. These scores suggest that Indian consumers view the India Top 50 brands as Meaningfully Different in ways that merit a higher price. The highest scorers in India have done an especially good job establishing their Difference in the consumer mind. They’re Salient. But there’s room for other brands in India to improve their Brand Premium scores.

**BRAND POWER**

It’s difficult to see how BrandZ™ India Top 50 brands could improve their Brand Power scores, however. The India Top 50 scored 229 in Brand Power, which by itself is a high score on a scale where an average brand scores 100. And the India Top 50 score far exceeds the 186 score of the BrandZ™ Global Top 50. The India Top 50 Brand Power score reflects the fact that the India Top 50 brands have done a good job of establishing themselves in the minds of local consumers in ways that drive sales and market share. In addition, the India Top 50 scores are based on performance in India, while global brand scores depend on brand performance worldwide. These distinctions also inform the contrast in the individual scores of the India and global Brand Power leaders. The individual India Brand Power leaders score higher than the global leaders, but both groups score exceptionally well. These are the India Top 50 Brand Power leaders and scores: Kingfisher beer (471), the personal care brand Fair & Lovely (463) and Colgate (598). The global Brand Power leaders are Facebook (502), Colgate (402) and Pampers (365). The presence of Colgate as a Brand Power leader in both the India and Global Top 50, but with a higher India score, illustrates Colgate’s tremendous worldwide brand equity, and also the impact of measuring performance in a single country market or multiple markets. Colgate also represents the diverse brand composition of the BrandZ™ database.

**BRAND IMPLICATIONS**

The BrandZ™ India Top 50 brands enjoy strong top-of-mind awareness in India. Indian consumers believe these Salient brands are Meaningfully Different in ways that merit a higher price (Brand Premium). But there is room for some brands in India to improve future sales and earnings (Brand Potential). The lower Brand Potential score for brands in India implies that they have work to do. While brands in India score well in Brand Premium and exceptionally high in Brand Power, they may not have fully leveraged these strengths. The BrandZ™ India Top 50 can command a Premium... The BrandZ™ India and Global Top 50 score comparably in Premium, with Indian brands a notch higher at 112 and global brands at 111.

<table>
<thead>
<tr>
<th>Top 3 Brands</th>
<th>Average Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>156</td>
</tr>
<tr>
<td>Apple</td>
<td>162</td>
</tr>
<tr>
<td>Colgate</td>
<td>164</td>
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</table>

... Their Power drives sales and market share...

The India Top 50 Brand Power score far exceeds the score of the BrandZ™ Global Top 50.

<table>
<thead>
<tr>
<th>Top 3 Brands</th>
<th>Average Power</th>
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<tbody>
<tr>
<td>Facebook</td>
<td>747</td>
</tr>
<tr>
<td>Pampers</td>
<td>598</td>
</tr>
<tr>
<td>Colgate</td>
<td>463</td>
</tr>
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</table>

... But the Potential of the India Top 50 needs strengthening

In Brand Potential, an indicator of future success, the BrandZ™ India Top 50 scored only 101, just about average.

<table>
<thead>
<tr>
<th>Top 3 Brands</th>
<th>Average Potential</th>
</tr>
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<tbody>
<tr>
<td>Facebook</td>
<td>136</td>
</tr>
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<td>Apple</td>
<td>127</td>
</tr>
<tr>
<td>Colgate</td>
<td>132</td>
</tr>
</tbody>
</table>

100 is an average score. 105 and above is a good score

Source: BrandZ™ / Millward Brown / Based on the BrandZ™ India Top 50 and Global Top 50
BrandZ™ success drivers increase in importance as India matures

A recent analysis of the BrandZ™ Top 100 Most Valuable Global Brands over the past 10 years revealed a series of brand characteristics and behaviors that drove strong brand value appreciation over a difficult decade and are critical for future brand value growth.

These success drivers complement the metrics that comprise brand equity—Different, Meaningful and Salient—and the attributes that produce competitive advantage—Premium, Power and Potential.

The most important of these drivers for Indian brands are Brand Purpose, Brand Proposition, Innovation and Love. These drivers will become increasingly relevant as the Indian market matures. They identify actions brands need to take to remain competitive. Indian brands now lag global brands in most of these future-focused drivers, a finding that corresponds with the relatively low Potential score of Indian brands.

**BRAND PURPOSE**

Brand Purpose measures the extent to which consumers perceive a brand as having more than a commercial reason for being. Influenced by millennials, today’s consumers prefer brands that are in business not only to make money, but also to improve the life of the consumer and even make the world a better place.

Brand Purpose becomes especially important as a differentiator in mature markets where brands have achieved rough parity in functional and emotional benefits. For this reason, Brand Purpose will become increasingly important in rapidly maturing India.

Brand Purpose also will become important in India for a particularly Indian reason. The government and citizens of India expect it, as indicated by government-mandated Corporate Social Responsibility (CSR) spending.

The BrandZ™ India Top 50 scored 110 in Brand Purpose, which is a strong result and higher than the 100 score of an average brand, but far behind the 129 score of the Global Top 50.

These three brands in India achieved the top Brand Purpose scores: Colgate (135), tire maker MRF (136) and Kingfisher beer (131). The global leaders scored dramatically higher: IBM (337), Apple (310) and IKEA (248). Each of those global brands is clearly associated with improving people’s lives or changing the world in positive ways.

**BRAND PROPOSITION**

Brand Proposition is the clear, resonant idea that encapsulates a brand. When Brand Proposition is expressed with compelling advertising, brand value grows exponentially.

Over the past 10 years, the brands that consumers identified as having a strong Brand Proposition and compelling advertising increased an average of 166 percent in brand value. In contrast, brand value increased only 21 percent on average for brands lacking a strong Brand Proposition and compelling advertising.

The BrandZ™ India Top 50 scored a respectable 109 in Brand Proposition, but much lower than the 127 score reached by the Global Top 50. The India Top 50 Brand Proposition leaders are tire maker MRF (136), Colgate (136) and Indian Oil (128). IBM (303), Apple (267) and FedEx (264) lead the global brands.

**INNOVATION AND LOVE**

Innovation and Love both contribute to brand equity. Real innovation, or setting trends, is one of the aspects of brand equity. Love is one of the aspects of Meaningful, another component of brand equity.

Both Innovation and Love tend to be more important to building brands as markets mature and success in crowded categories requires being perceived as Different in a Meaningful way from the competition.

The Indian market is heading toward intense Innovation and iterative progress. As the Indian market quickly matures, brands will need to sharpen their Brand Proposition to remain competitive. The most successful Indian brands will marry a strong Brand Proposition with compelling advertising.

Closing the Innovation and Love scoring gaps is the next stage for Indian brands and it’s important for several reasons. First, a more competitive market will require greater differentiation. Second, it will be difficult to grow Brand Power or Brand Premium without being strong in Innovation and Love.

Finally, Innovation and Love form a virtuous circle. Innovation drives Love. And loved brands sustain loyalty even as they swing between periods of intense Innovation and iterative progress.

**BRAND IMPLICATIONS**

Brand Purpose in India is already a civic duty. It’s about to become a brand building imperative. Indian consumers expect the brands they favor to actively participate in building a more prosperous and equitable society.

As the Indian market quickly matures, brands will need to sharpen their Brand Proposition to remain competitive. The most successful Indian brands will marry a strong Brand Proposition with compelling advertising.

Brands in India lag global brands in key success drivers

A 10-year analysis of the BrandZ™ Top 100 Most Valuable Global Brands revealed key drivers of future brand success, including: Brand Purpose, Brand Proposition, Innovation and Love. Indian brands lag global brands in each instance.

<table>
<thead>
<tr>
<th>Brand Purpose</th>
<th>Brand Proposition</th>
<th>Innovation</th>
<th>Love</th>
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</thead>
<tbody>
<tr>
<td>129</td>
<td>127</td>
<td>120</td>
<td>131</td>
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<tr>
<td>110</td>
<td>109</td>
<td>105</td>
<td>113</td>
</tr>
</tbody>
</table>

120 is an average score; 130 and above is a good score.

Source: BrandZ™ / Millward Brown / Based on the BrandZ™ India Top 50 and Global Top 50.
Indians lead global organizations in brand and corporate reputation

RepZ is a BrandZ™ measurement of brand and corporate reputation, intangible assets that are especially critical today when consumer distrust of brands and large institutions is high and negative opinions travel quickly on social media.

Corporate reputation results from consumer perceptions of current and past performance. RepZ divides these perceptions into four components: success (strong financial results), fairness (good pricing and practices), responsibility (positive engagement with employees and society), and trust (reliably delivers on promises).

The BrandZ™ India Top 50 outscored the Global Top 50 on the total RepZ score, 112 to 108, and the brands in India led in three of the four components of RepZ. The exception is success, where India’s score of 114 almost matches the 116 global score.

Brands based in a market tend to score higher than global brands in responsibility and trust scores because they’re seen as more engaged with local communities. In addition, trust in brands is higher in India than in many other countries for several reasons.

The proliferation of brands is a relatively new phenomenon in India. Brands fascinate Indian consumers, who remain optimistic rather than cynical. The consumer distrust of banks that followed the financial crisis is not a factor in India because Indian banks escaped the crisis relatively unscathed.

Brands based in a market tend to score higher than global brands in responsibility and trust scores because they’re seen as more engaged with local communities. In addition, trust in brands is higher in India than in many other countries for several reasons.

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India Top 50 leads Global Top 50 in RepZ

The BrandZ™ India Top 50 outscored the Global Top 50 on the total RepZ score, 112 to 108, and the brands in India led in three of the four components of RepZ.

<table>
<thead>
<tr>
<th></th>
<th>Success</th>
<th>Fairness</th>
<th>Responsibility</th>
<th>Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>116</td>
<td>102</td>
<td>106</td>
<td>101</td>
</tr>
<tr>
<td>Global</td>
<td>112</td>
<td>108</td>
<td>108</td>
<td>112</td>
</tr>
</tbody>
</table>

100 is an average score; 105 and above is a good score

Source: BrandZ™ / Millward Brown / Based on the BrandZ™ India Top 50 and Global Top 50

The India Top 50 brands enjoy an important competitive advantage because of their strong RepZ scores. Brands in India can further enhance the scores by increasing the success component of RepZ, which depends on consistently strong financial performance. However, as brands in India advance their financial goals they need to keep putting the customer’s interests first, and not succumb to practices that eroded the reputations of some brands in the West and China.
The Top 10 Risers increase significantly in brand value

The Top 10 Risers outperformed the overall record-breaking 33 percent brand value increase of the BrandZ™ Top 50 Most Valuable Indian Brands 2015.

Half of the Top 10 risers are financial services brands – four banks and one insurance brand. Their rise reflects the sector’s year-on-year 49 percent brand value increase, and the 41 percent contribution that the financial sector makes to the total brand value of the India Top 50.

Of the other five brands, three come from the personal care category, and one each come from automobiles and paints. The representation of personal care brands demonstrates how these brands evolved to serve the needs of more sophisticated and affluent Indian consumers. The brands segmented their offerings and introduced premium products. The story in paint is similar, while in the auto category certain brands performed well while other brands faltered.

The Top 10 Riser results also reflect the diverse mix of brand ownership models in India. Two of the five financial service brands are State Owned Enterprises. Of the personal care brands, Lakmé, Lifebuoy and Colgate are part of multinationals (MNCs) publicly listed in India. Maruti-Suzuki is an MNC brand while Berger Paints is a private Indian brand.

The bank brands strengthened brand presence with retail customers. One of India’s largest state-owned banks, Union Bank of India, increased brand value an extraordinary 72 percent as it accelerated digitalization efforts and expanded its Immediate Payment Service (IMPS), a real-time money transfer facility popular in India. The 61 percent brand value increase of Punjab National Bank in part also reflects the strong growth of its retail business. Similarly, IndusInd Bank focused on retail and opened the first fully digital branch at a metro station. And ICICI Bank launched a mobile wallet app called Pockets by ICICI Bank, which enables users to transfer money using emails, mobile phone numbers and Facebook addresses.

The personal care brands sit prominently in the Indian consumer mind. Lakmé is number one in Brand Contribution, the BrandZ™ measurement on the influence of brand alone on earnings. Lifebuoy has been present in India for over 100 years. Colgate scores 598 in Brand Power in India. Brand Power measures a brand’s ability to drive sales and market share. An average score is 100. Lakmé and Colgate leveraged this strength to segment their markets and introduce new products, particularly at the premium end of the market. Lifebuoy continued its well-known initiatives to expand business in rural India and promote improved hygiene practices to combat disease.

The four-wheeler leader Maruti-Suzuki increased a whopping 54 percent in brand value. Hero, the leader in the two-wheeler segment, improved 34 percent in brand value. These brands reinvented themselves by identifying and filling product gaps in the evolving Indian market. With well-considered segmentation, the brands served the needs of first-time buyers, shoppers trading up to premium models and those in the vast middle.
Brands new to Top 50 all originate in India

Four brands entered the BrandZ™ Top 50 Most Valuable Indian Brands in 2015. And reflecting the growing strength of Indian brands, all four newcomers are brands that developed locally. In contrast, two of the brands they replaced in the ranking are owned by multinationals that are traded on Indian stock markets.

Two of the newcomers – Axis Bank and Canara Bank – are in the financial services category; and two are in auto or auto aftermarket – the tire producer MRF and automobile maker Royal Enfield. Three of the newcomers are privately owned and one, Canara Bank, is a State Owned Enterprise.

The presence of these brands in the BrandZ™ India Top 50 in part reflects the strength of their categories. Financial services led in category growth, increasing by 49 percent. Auto and auto aftermarket grew 27 and 28 percent, respectively.

With a valuation of $2.5 billion, Axis Bank not only joined the BrandZ™ India Top 50; it arrived in eighth place. That’s because, despite its relatively high brand value, Axis Bank did not until now derive over a quarter of its revenue from its retail business, a BrandZ™ ranking eligibility requirement.

In an illustration of its commitment to building its brand for retail customers, Axis Bank recently launched a social payment app called Ping Pay. It enables users to transfer funds easily to any of their contacts on WhatsApp, Facebook, Twitter and other social networks, without knowing the recipient’s account details. Users can accompany the money transfer with messages, which makes the transaction social as well as financial.

Royal Enfield, a motorcycle maker, entered the BrandZ™ India Top 50 at number 50. The brand, a subsidiary of Eicher Group, is present in major Indian cities and towns, with 11 of its own stores and through a network of dealerships. The company began in the UK around 125 years ago.

Canara Bank, which entered the BrandZ™ India Top 50 at number 36, is one of India’s oldest financial institutions, established in 1906. In advancing a policy of inclusion, the bank added more ATMs and branches, especially in rural areas, raising the number of branches to 5,682 as of March 2015. Canara Bank also launched several initiatives to expand retail credit.

MRF, which began as a balloon factory around 70 years ago, is one of India’s leading makers of replacement tires. The popular brand launched an online campaign to build word of mouth for what the company calls India’s first radial tire for a motorcycle. Closely associated with motorsports and cricket, MRF entered the ranking at number 37.

Newcomers: 4 brands enter the BrandZ™ India Top 50 ranking

Reflecting the growing strength of Indian brands, all four newcomers are brands that developed locally.

<table>
<thead>
<tr>
<th>Top 50 Rank</th>
<th>Brand</th>
<th>Category</th>
<th>Brand Value 2015 $M</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>AXIS BANK</td>
<td>Banks</td>
<td>2,494</td>
</tr>
<tr>
<td>36</td>
<td>MRF</td>
<td>Tires</td>
<td>645</td>
</tr>
<tr>
<td>37</td>
<td>MRF</td>
<td>Tires</td>
<td>630</td>
</tr>
<tr>
<td>50</td>
<td>ROYAL ENFIELD</td>
<td>Automobiles</td>
<td>403</td>
</tr>
</tbody>
</table>

Source: BrandZ™ / Millward Brown
Leaders in brand strength cross multiple categories

Brand Contribution is a BrandZ™ metric that indicates the proportion of sales and margin directly attributed to brand alone excluding all other factors. In other words, when the financial impact of the stock market, the economy and other external factors are stripped away, what’s left is Brand Contribution – the naked strength of the brand. Brand Contribution is calculated as an index of 1 to 5, with 5 being the highest score. (For a complete definition please see Methodology in the Resources section of the report.)

Brands with high Brand Contribution are more resilient and enduring. Among the BrandZ™ global leaders in Brand Contribution are Pampers and Coca-Cola. In the BrandZ™ Top 50 Most Valuable Global Brands ranking of Brand Contribution leaders, certain categories – personal care and luxury, for example – are especially well represented. Category representation varies, however, market-by-market.

The Top 10 Brand Contribution leaders of the BrandZ™ India ranking includes these seven, mostly FMCG, product categories: paints, personal care, home care, lubricants, food and dairy, banks and alcohol. No individual category dominates in number of brands, although paints, home care, and food and dairy include two brands apiece.

This combination of categories distinguishes the Indian Brand Contribution ranking from those of other countries or regions, and their most represented categories, for example: China (food and dairy and technology), Latin America (beer and retail), and Indonesia (food and dairy, real estate and tobacco). The presence of a bank brand in the Indian Brand Contribution Top 10 particularly differentiates India, as financial performance generally is the primary driver of brand value in the financial services category.

In addition, compared with other markets, the Indian Brand Contribution ranking reflects a more diverse mix of brand ownership models. Four brands are private Indian brands, either owned by individuals or an Indian conglomerate. Five are owned by multinationals and one is a State Owned Enterprise.

The brand strength of Lakmé, the personal care brand owned by Hindustan Unilever, has enabled the brand to successfully command a premium for the brand. The two paint brands, Berger Paints and Asian Paints, also have evolved with their customers, from stores selling paint to men, to modern showrooms for men and women seeking decoration solutions. Both paint brands are privately owned.

The two home care brands, Surf Excel and Rin, are detergents owned by Hindustan Unilever. Their high Brand Contribution illustrates the brand building capabilities of a multinational that, for both brands, emphasizes the symbolic importance of clean clothes for positive self-image.

The food and dairy brand Saffola, a cooking oil owned by an Indian FMCG producer, has nurtured a clear brand proposition about promoting healthy living and the prevention of cardiovascular disease. Horlicks, owned by UK-based GlaxoSmithKline, has been able to extend the popularity of its famous chocolate malt drink across other food offering.

The Indian brand Castrol is among the country’s largest makers of industrial lubricants. It scores extremely high (236) in the BrandZ™ metric Salient, a measurement of top of mind awareness. Indian consumers also see the brand as Meaningful and meeting their needs.

In its current incarnation, the State Bank of India has been around since the 1950s, but the original bank was established in 1806. The bank has been able to capitalize on that heritage and consumers view it as different from the competition, according to BrandZ™ research. Indian consumers view McDowell’s as Different. A brand offering whisky and other alcoholic drinks, McDowell’s has successfully extended its brand to introduce premium products. The Indian conglomerate United Spirits Limited owns McDowell’s.

Brand Contribution: Brands represent many categories

In the BrandZ™ India Top 50, no individual category dominates in number of brands, although paints, home care, and food and dairy include two brands apiece.
“THE EXTENDED FAMILY IS THE FOUNDATION
OF PERSONAL MEANING AND SOCIAL COHESION.”
Part 4

One of India’s largest privately owned banks, Axis Bank debuted in the BrandZ™ India Top 50 this year, at number eight.

**Q&A with Sagnik Ghosh**
Senior Vice President and Head of Marketing
Axis Bank Limited

**Brand communication tools are much stronger today, but so is the competition**

Customer service strategy and implementation are critical

The horizon certainly looks bright for the future of brands in India. Among the factors this can be attributed to are the number of touch points and opportunities for a brand to tell its story. In the ever evolving digital, social and mobile world, it’s a lot easier for a brand to target, reach, and stay connected to its desired audience. Moreover, the plethora of tools available for measuring results, running custom audience campaigns, measuring performance, real-time and optimizing campaigns real-time, empowers brands to be more scientific and result oriented in their marketing efforts.

On the other side, the thriving competition is keeping brands on their toes and pushing them harder and harder to stand out and seek the consumers’ share of mind and wallet.

**What is the most innovative way you’ve communicated to customers recently? A new commercial or social media campaign, for example?**

One is our recently launched multi-social payment app Ping Pay. What was interesting is how a core insight brought to life a novel communication idea that wasn’t touched upon in the payment solutions advertising space before. It was based on the insight that instances of money exchange between friends do not involve just the exchange of money but also an emotional connection that sums up the story around the money exchange. With Ping Pay, the mobile user can text back and forth with contacts while asking for money or sending it. The commercials articulated this insight as Jab bih Pay karo, kuch na kuch say karo, or “Whenever you pay, say what you want to say.” The thought is brought to life in the films, with friends exchanging comments and photos when they pay money to each other.

**How has your media investment strategy changed over the past few years? Are you spending more on digital and in what ways?**

Time spent by our target group on TV and Internet has been growing over the years. In fact, the time spent on Internet has drastically increased, whereas there has been a sharp dip in time spent on print in the same period of time. In line with this observation, we have been continuously evolving our media strategy to increase more exposure on digital and TV and reduce exposure on print.

We have been using digital very tactically, from creating awareness about the products to creating a separate channel of lead generation and fulfillment. In fact, we have been able to explore and exploit all the platforms of digital media, meaning search, social and display. We have been using search for intent based targeting; social not just as any other advertising medium, but for engaging in conversations that are beyond transactions, and display for increased reach and content based relevant advertising.

**When you think about what you believe are great Indian brands, what qualities do they share in common?**

In my view, there are set of “three Cs” that form the cornerstones of successful Indian brands. These are customized offerings, contextual advertising and customer service. First, there are brands that have made a considerable effort understanding demand drivers among Indian consumers and they’ve committed investments for real innovations. This ability to keep up with the consumer desires, or more importantly, to anticipate desires, makes a great Indian brand. The second key is targeted contextual advertising – making your proposition and offering come alive at touch points where your consumer is likely to need them. Third, and most important, is a focused and well thought out customer service strategy and implementation. This depends on listening across platforms to gauge consumer sentiment, responding quickly to queries and complaints, and creating delight.

**What is your brand’s particular commitment to Corporate Social Responsibility (CSR), and how important is it to the brand’s relationship with consumers?**

Axis Bank as an organization strongly believes that CSR and sustainability are vital pillars of continual success for its present and future. Axis Bank has set up a Trust – the Axis Bank Foundation (ABF) to channel its philanthropic initiatives. The Foundation aims to provide one million sustainable livelihoods to the underprivileged, in some of the most backward regions of the country, by 2017. The foundation was recognized at the Forbes India Philanthropic Awards 2014.

With emerging awareness levels of giving back to the society at an individual level, it has become of paramount importance for brands to adopt a more holistic approach towards CSR to build brand value. The consumers of today are looking out for brands that not only produce a better product, but are also doing something more positively for the world.
What is the most innovative way you’ve communicated to customers recently? A new commercial or social media campaign, for example?

Our recent launch of Pulsar RS200 in the Super Sports segment has been a resounding success, gaining leadership status within four months. In a high interest segment like super sports bikes, where the customer likes seeking information about the product and forming his own opinion, you don’t hard sell. And neither did we. We built the brand with strong and genuine conversations around it, using digital, videos and influencers. We have not even touched mass media yet. We wish we had warned our plant, which is working hard to reduce the month-and-a-half waiting period!

Are you optimistic or pessimistic about the future of brands in India over the next five years and why?

India is witnessing the emergence of several new categories and sub-categories. Many of them are a result of an evolution in technology, regulatory change or a larger ecosystem. This will lead to a proliferation of multiple operators with very little product differentiation or time lag.

A sudden growth of a category combined with scale, competition and little differentiation is one of the best environments for brands to prosper. The brands that connect with consistency will remain, while the rest will consolidate. Brand building will be the biggest differentiator and success driver for these players. Therefore, one can look forward to an action packed decade of brand building and brand innovations – with several old rules being broken!

When you think about what you believe are great Indian brands, what qualities do they share in common?

All great Indian brands, old and new, have done a marvelous job of effortlessly (or so they have made it appear changing over the last decade-and-a-half in line with the new consuming class. They have transitioned their stance to connect demographically as well as attitudinally with today’s young, migrant, middle class, hardworking, digitally-aware and fun-loving consumer.

Are there certain brand characteristics that are more critical for success in India than they might be in other parts of the world?

Trust and value — something that still hasn’t changed.

What is the key to reaching young people compared with reaching their parents?

Being ready to meet already aware customers and answering their intelligent questions!

Q&A with Sumeet Narang

Vice President of Marketing
Bajaj Auto Limited

Technology, new regulations result in some new categories and additional sub-categories

In this environment, brand building becomes the biggest differentiator

Bajaj Auto is a leading manufacturer and marketer of motor scooters, motorcycles and commercial three-wheel vehicles also known as auto-rickshaws. It ranks number six in the BrandZ™ Top 50 Most Valuable Indian Brands.

"LOOK FORWARD TO AN ACTION PACKED DECADE OF BRAND BUILDING"
ABOUT FINDING MOMENTS OF POISE AND GRACE.

INDIA SPEAKS TO THE MODERN WORLD
Has increased empowerment changed consumer attitudes toward brands, and in what ways?

Yes, consumers today prefer brands that stand up for the social values that they associate themselves with. Campaigns with social messaging have such strong and widespread impact. In the future, we'll see Indian consumers demand participation in the brand's evolution. They'll view themselves as brand custodians in equal measure as the brand owners.

What is your brand's particular commitment to Corporate Social Responsibility (CSR) and how important is it to the brand's relationship with consumers?

We believe that businesses can and should have a positive impact on the communities they serve. For growth to be responsible, it should go beyond numbers. We have a two-pronged approach when it comes to community and social initiatives. The first pillar of this movement is through brands that not only meet the consumer's ever-changing needs, but also do good for the society at large.

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What is the most innovative way you've communicated to customers recently? A new commercial or social media campaign, for example?

Brand campaigns have to be about touching an emotional chord with the audience thereby owning their mind-space. Our recent campaigns have reflected this. With our Vatika brand’s new “Brave & Beautiful” campaign, the protagonist’s story of coming out stronger after losing all her hair to cancer delivers this message aptly. The SavvyShakti “700 Steps to a More?” campaign builds home toilets to protect the safety and dignity of the women in rural India forced on long and dangerous walks to find outdoor privacy. These new campaigns debuted in the digital space and have been very well received. The “Brave & Beautiful” campaign, for instance, received over three million views within just a month of its online launch and has become one of the most talked about campaigns in recent times. It has also become the single most awarded campaign at the Goafest 2015, winning the Grand Prix along with seven other trophies and the Blue Elephant at Hypermart Ad and Digital Awards.

When you think about what you believe are great Indian brands, what qualities do they share in common?

Even at the cost of sounding boastful, I would like to start with Dabur; then say Amul, Tata, Titan Raymonds, Airtel, Hero… The list is endless. All share strong values of trust, Indian ethos and a quintessential “Indianness” in their communication and attributes. In fact, the same can also be seen in many multinational brands that have become successful in India.

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When are there certain brand characteristics that are more critical for success in India than they might be in other parts of the world?

To make a mark in India brands need to deliver strong value propositions. We Indians are very hard value seekers compared with other markets. Apart from this, brands need to be socially inclusive in their outlook. They need to enable consumers to feel good about themselves.

What are two or three ways that brand-building priorities in India will change as the country becomes more prosperous and urban?

Brands will have to stay at the cutting edge of the market evolution to be part of the consideration set of consumers in emerging India. Continuously innovating to deliver consumer delight will be essential for brand survival. Being present across relevant communication media with engaging content will become critical. User owned content will be valued more than just company-speak. Brand marketers can ignore e-commerce at their own peril.

What is the key to reaching young people compared with reaching their parents?

Today’s youth are more socially aware and want to participate in bringing about a change in the society. Successful campaigns are tailored to speak their language across media that they readily access and share.

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Q&A with Kartik Jain

Executive Vice President and Head of Marketing
HDFC Bank

Consumer presence on web and mobile channels drives more investment to digital

Customers expect easy access to brands anywhere and any time.

One of India’s original private banks, HDFC Bank continues to expand rapidly and for the second consecutive year ranks number one in the BrandZ™ Top 50 Most Valuable Indian Brands.

Are you optimistic or pessimistic about the future of brands in India over the next five years?

One is clearly optimistic about the future of brands in India. As the number of products continues to proliferate, customers are spoiled for choice. In such a scenario, differentiated and well-positioned brands will make it easier for customers to make a purchase decision. Brands that resonate with customers and meet their needs will see higher revenue and profits and organizations will see increased value in investing to build strong brands.

How has your media investment strategy changed over the past few years? Are you spending more on digital and in what ways?

Our philosophy towards media has not changed over the past few years and we continue to look at the ROI from our media investments and optimize spending based on the same. We are spending more on digital as the medium lends itself to sharper ROI tracking with more targeted options. Our customer base is also present on web and mobile channels. In order to provide service to them through the channels of their choice, we provide comprehensive digital banking solutions that give 24/7 access to our full range of products and services in a convenient, easy and secure manner, thereby delivering the “PowerOfBanking” to our customers.

Has increased empowerment changed consumer attitudes toward brands and in what ways?

The relationship between customers and brands has changed with customers having the upper hand. They have choice due to the proliferation of quality brands and they have a voice due to easy access to social media. Customers expect brands to listen to them and be cognizant of this shift in power. Brands that don’t respect consumers will not be respected by consumers.

Further, with the advent of social media, customers expect brands to be accessible and provide convenience at the time of their choosing. Social media has also empowered customers to give their feedback, share grievances and praise brands in real time. Brands therefore need to be responsive in their engagement with customers, keeping in mind the changing landscape.

What is your brand’s particular commitment to Corporate Social Responsibility (CSR), and how important is it to the brand’s relationship with consumers?

HDFC Bank is deeply committed to CSR with a focus on reaching out to marginalized communities and rural India. Our Sustainable Livelihood Initiative empowers women in rural India by giving them direct access to livelihood finance, as well as non-financial services such as occupational training, credit counselling and financial literacy training. Through this initiative we have already reached out to over 3.5 million households in the country. We also focus on education, vocational training, community initiatives and environmental sustainability. Banking is based on trust with a focus on long-term relationships. Our CSR philosophy reflects this sentiment where we look at sustainable solutions with long lasting impact.

"BRANDS THAT DON’T RESPECT CONSUMERS WILL NOT BE RESPECTED BY CONSUMERS"
Senior citizens are a group of considerable size for brand marketers to consider. Now in their 60s and 70s, these people have passed their needy and speedy years. The Indian grandmother and grandfather have both time and money. But are brands leveraging this silver opportunity? Not really, and consider the possibilities. Today’s youthful seniors are mentally prepared to reside in senior communities where they can lead independent lives. Why not lavish these facilities with world-class features from the real estate brands? Seniors want to keep working. Why not have a job search website where they can seek suitable work? The silver luxury domain is still unexplored. Many people of this age desire – and can afford – luxury. The trick is to create functionally beneficial luxury for them. Also tourism brand communications can look beyond their regular targets. Seniors seek properly packaged tours that attend to their particular needs. And the opportunities for world-class geriatric products and services are obvious. What are brands waiting for?

In the social media age, celebrity is the focus of a million Twitter jolts, or gets “raasted” on stage by unknown comedians, it is clear that the way we look at celebrities has changed. We look at them as human beings who are as imperfect as we are, and this is what makes us increasingly intolerant of crafted images that make celebrities seem perfect.

While celebrity managers ensure that their clients maintain an active social media presence to cultivate the correct image, they increasingly have little control over what information about their clients finds its way online and becomes viral.

When celebrities operate in private but attempt to seem perfect in public the charade doesn’t impress well informed consumers. Similarly, an endorsement for fairness cream by a celebrity with naturally fair complexion will not be credible. Endorsement is no longer about merely displaying a celebrity next to a product on screen. It’s about a much deeper connection. While brands need to be very careful not to make the wrong associations, there’s also much to gain if they get it right.

The word “normal” has no definition anymore. Taboos are mere words. The young accept and celebrate the real, whether it is their own emotions, choices or mistakes. Young India is tolerant; free in its thought and liberated in its approach. The notions are simple. Whether it is the outsourcing of support to legalize same-sex relationships, celebrate the first transgender school principal, or the struggle for equality across genders, acceptance of the real is the new popular.

The young recognize imperfections, make their own judgments and fight for what they believe is right. Boys can cry. Women can hurt, hit and fight. The brands they love are real. Levi’s and Diesel apparel or the fashion accessory makers Fastrack and Raga each communicate emotionally. Brands that are succeeding aren’t insisting on conformity and convention, instead they embrace imperfections and truth.

As the e-tailing phenomena manages to steal headlines as well as steadily gain in both share of mind and wallet, its brick and mortar counterparts are in search of answers. How do they battle the relentless onslaught of year-round discounts, limitless range and quick delivery time that e-tailers offer? The answer lies in the approach they choose. Shopping in India has evolved from being about what we buy, to what we do. It’s no longer about simply acquiring products but also about enjoying an experience. And there lies the advantage of the brick and mortar stores. Their floor space becomes their platform to engage consumers with experiences that combine the real and virtual worlds.

Globally, brands like Macy’s and Nordstrom, early adopters of omnichannel retailing, have managed to seamlessly connect their online presence with richer and more enjoyable in-store experiences. They provide a good model for Indian retailers.

Tools for improving the in-store shopping experience include location-aware apps that provide sales staff with customer preferences and personalized shopping. In-store ‘endless aisle’ kiosks for ordering a range of items, many not available in-store, can increase customer satisfaction and store productivity. These digital tools, and others, put the brick and mortar store in a more powerful position to defend against the e-tail blitzkrieg.
Our Insights

CLOSE-UPS
Craft the brand story well and tell it persuasively

Atul Sharma
Head, Step Up
Genesis Burson-Marsteller
Atul.sharma@bm.com

Imagine a scenario where public places like temples, beaches, cinema halls and railway stations were out of bounds for you. Sadly, this is a reality for millions of people in India who are differently-abled. But brands can help turn this reality around. Helping differently-abled people is not only a great way to help society, but also to build brand equity.

In one example, Hifil Johnson, an Indian bath tiles brand, launched an initiative called the Red Ramp Project to help the differently-abled access places like Kinn Beach in Goa, where a ramp made with the brand’s tiles enables people in wheelchairs to reach the sand and sea. Employing differently-abled people is another way in which brands can empower them and also build their own equity. People start perceiving such brands as socially responsible, which generates goodwill.

Featuring the differently-abled in advertising is another approach. As a person in a wheelchair, how would you feel looking at perfectly-abled people advertising your favorite brand?

Would it speak to you as much as say, someone using crutches? Being more inclusive of people with special needs can help these individuals, build a more compassionate society, and elevate brands.

Close to half of all Indians are less than 30 years old and a vast majority have virtually grown up on Cadbury’s chocolates and Maggi noodles. They’ve guzzled Old Monk Rum through college with that trusty Nokia handset at their side, and today they can’t do without Facebook, Twitter and Whatsapp to let the world know what they’re all up to.

It really isn’t that surprising that our relationships with some brands are like our relationships with very special people in our lives. Just as there is always someone we want pour our heart out to when we’re upset, there almost always is a brand people connect with when there is no one to talk to. And just as we all look forward to celebrating our successes with our loved ones, some brands invariably have a part to play in those special moments.

It follows that how we interact as people is a good model for the relationships built between a brand and its customers. When relationships are threatened, talk to your customers, clarify misunderstandings, own up to your faults and apologize. Build trust – the bedrock of all relationships. Woo customers and bring the magic back into their lives!

Saloni Sabnis
Senior Research Executive
Millward Brown
Saloni.Sabnis@millwardbrown.com

“Goodbye” invasion of privacy, “Hello” invitation to privacy

Pragya Patra
Senior Planner
Ogilvy & Mather, Gurugram
Pragya.Patra@ogilvy.com

An incessant onslaught of advertising follows your search behavior. When one adds to this the phantom of independent data brokers selling aggregated online data to brands, it’s the consumer left empowered or vulnerable? Privacy for lack of it has been among the key concerns accompanying the rising buzz around big data.

Growing demand for wearable technology takes the privacy debate even further as consumers invite brands into their personal space, making brand access to consumer information even more acceptable. The news of Google and Levi’s collaborating to create clothes woven with conductive yarn potentially moves wearables beyond the heart rate monitoring fitness band and phone synced smartwatch to a new generation of products that seamlessly integrate the technology we use.

The resulting big data will yield richer consumer understanding. To truly empower consumers, brands need to leverage this data to deliver real value and better brand experiences. Allowing brands this deep into the consumers’ private space will make interactions more relevant and personalized and will also raise new issues about boundaries and trust.

Big Data

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Appearances in India can be striking, and also distinct from the deeper reality.
PART 5

Brand Building Best Practices in India
Brands can play an important role in empowering people in India

Consumers will remember and reward the brands that help empower them

At the core of empowerment is power. Unlike development, which can be easily quantified and measured, empowerment is a variable that needs to be analyzed in a more comprehensive manner. The scale and intensity of empowerment depend upon the context, the specific conditions that it is exhibited in. For example, a person living in a northeastern Indian state may not feel powerless in his or her own environment, but the same person when placed in a state like Delhi suddenly becomes a minority and feels the need to be empowered.

To understand the complexity and dynamism of empowerment in today’s India, it is imperative that the need of empowerment is seen and analyzed with a relevant cultural, social, political and economic lens. In a time when value systems are merging, borders are diminishing and new ideas are welcomed, the need as well as scope of empowerment has increased manifold.

Some populations feel they are in the minority in terms of beliefs and values. Deprivation is not just of rights, but also of opportunities. Equality is also about equal privileges. These emerging groups may not be weak economically or socially, but they definitely feel a loss of power, and they are scripting their own empowerment stories.

National development is not possible without the empowerment of people. If development is the fruit of modernization then empowerment is the root. The context for empowerment, the reason and rationale, may vary with circumstances, but empowerment has always been at the threshold of change.

Do brands have a choice about whether to play an active role in these empowerment stories or remain bystanders? No. These are the future consumers and thought leaders who will decide the success or failure of brands. So either brands are a part of their story, or in the future brands will have no story at all.

The entry point for a brand could be anything – from a customized savings scheme to an app for young twentysomethings living away from home pursuing their dream, or something for single parents facing unique challenges in raising their children alone. But can we build a framework that brands can refer to when taking this opportunity? Here are five possible ways:

1. BEGIN A POSITIVE CONVERSATION
   Bharat Matrimony, an online matchmaking service, showed how a husband supporting his wife’s decision to pursue her career can lead to a better relationship.

2. HOLD UP A MIRROR
   KBC, a popular TV game show, highlighted the prevalence of racial discrimination even in a modern, urban society.

3. PARTNER WITH THEM ON THEIR JOURNEY
   The laundry detergent Ariel became an advocate for women with its “Share the Load” campaign, which shared a poll showing that more than three-quarters of Indian men think doing the laundry is a woman’s task.

4. INNOVATE TO MAKE THEIR LIVES EASIER
   Product and service innovations by many brands accommodates the changing needs of consumers today’s India. These brands include Domino’s Pizza with affordable pricing, McDonald’s restaurants with extended hours and the food ordering app Tiny Owl providing all-night delivery.

5. SPEAK THEIR LANGUAGE.
   The “Be You” campaign of the e-commerce brand Jabong showcased the point-of-view of a couple in a live-in-relationship in order to become part of the discourse. It is not necessary for brands to position themselves exclusively as for these audiences of people seeking some aspect of empowerment. The trick is to identify relevant entry points. For example, Cadbury’s Diwali campaign empowers single men and women living away from home to be a part of the festivities. In a fly home free offer, the snack food Kurkure promises to send people home for the festive season. To help students or workers living away from home, Fortune Oil’s “Mother Exchange” connects them with local mothers who prepare their favorite foods.

The degree and intensity of involvement may vary. Brands will have to find their own entry points and roles in helping to empower people whose needs, wants, aspirations, problems and values are unique in nature due to their to unique life stories. As we move ahead, we may find new frontiers, conversations, and even a new dimension to their stories.
SEEK LUXURY PRODUCTS AND SERVICES.

EXPERIENCED, AFFLUENT CONSUMERS NOW
That India is a young country is an oft-repeated cliché. And this young India is not only driving the nation’s economy, but also its way of thinking. While most brands define youth as their ideal target group, how many are actually able to speak their language?

In our quest to decode the ideal language to connect with youth in India, we recognized that the globally relevant phenomenon of “coolness” also finds huge traction with Indian youth. However, this “Cool Quotient” that makes brands desirable to Indian youth, can’t be replicated from global success stories.

India has its own brand of cool, and during our journey we discovered some quintessential ingredients that help infuse the “Cool Quotient” into brands. We call them the “Cool Mantras.”

So what is cool in general…?

All things cool, when studied closely, can be distilled down to some common strains and characteristics. Identifying them is what we call cool spotting. Here are a few:

**COOL IS THE RESOLUTION BETWEEN INDIVIDUALITY AND BELONGING**
Stand out too much and you’re weird; blend in too well and you’re inconspicuous. Cool is the perfect balance between the two polarities.

**COOL IS SILENT REBELLION**
Quietly rebellious highlights in hair or hidden tattoos are symbols of non-conformity that make a statement without screaming out loud.

**COOL CREATES ITS OWN IDEOLOGIES**
With no real unifying causes or great wars to unite us, cool resorts to creating its own ideologies, like LGBT rights, and crusading for them.

**COOL IS RESPECT**
Cool earns the respect of its peers, and sometimes their envy. Perhaps that’s why stunt- and task-oriented reality show “Roadies” called its tenth season “The road to respect.”

**COOL DOES MORE, TALKS LESS**
Many brands, like Lenovo and Lead India, brought this truth alive through initiatives that glorified the “Do” way of life.

**COOL IS PARADOXICALLY COMPETITIVE**
Cool is a ferociously competitive spirit disguised in a nonchalant, unruffled refusal to play by someone else’s rules.

What’s uniquely cool for Indian youth…?

In our exploration of the world of the Indian youth, we discovered some uniquely Indian characteristics of coolness:

**IT’S COOL TO BE DESI**
Whether it’s homegrown brands like Micromax or Fastrack, or phenomena like Swachh Bharat Abhiyan, the national mission to take personal responsibility for the cleanliness of public spaces, youth are participating wholeheartedly in the India story. It’s cool to be Indian.

**IT’S COOL TO TAKE THE LEAD AND CHANGE THE STATUS QUO**
The bystander days of Indian masses are likely to become history as the current trend of taking the lead and “fixing” things continues. Youth are raising their voices against injustice and using the social machinery in a constructive manner.

**IT’S COOL TO BREAK TABOOS**
Very little is taken for gospel truth by the youth. They question the old ways, and find that ideas like divorce, same-sex relationships and pre-marital sex aren’t taboo; they’re just a different way of living.

**IT’S COOL TO PURSUE YOUR DREAMS**
The youth want to break free and be the authors of their own destiny. They follow their passions.

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To reach these influential young people, brands need to speak their language
Finally, a word of caution: Mantras for a brand to be cool are not rules. Rather they are beliefs by which brands can guide their actions to deliver a brand relevant to the young. If you’re trying too hard, it’s probably not cool.

Cool mantras to remember when talking to Indian youth

**ACT, DON’T PREACH**
Your actions will earn respect—far beyond your words. Instead of just talking about women’s safety, Channel V created an app to help women feel safe.

**CREATE TRIBES AROUND BRAND IDEOLOGY**
Match your values with theirs. The Hero Honda Pleasure motorcycle gained a strong following among young women by connecting with them on the value of equality.

**ALLOW ME TO USE YOUR BRAND TO CREATE MY OWN BRAND OF COOL**
Brands that offer themselves up as a platform for self-expression can go a long way in being cool. IDEA Cellular’s MyGang plan has managed to create a fertile platform for young people to connect, share and bond with their friends.

**EVOLUTION MUST BE CONSTANT AND CONSISTENT**
For the quickly bored young person who gets the point in 140 characters or less, you need to be quick and ever changing to stay interesting.

**HAVE A SENSE OF HUMOR**
Chumbak, inspired by the eccentricities of India, makes everyday products more interesting with its perspective on Indian culture.

**BE BOLD**
If brands can dare to say what others are too shy to say, or take a stand on a topic that is taboo, it will catch the attention of youth. Myntra’s advertisement showing a lesbian couple preparing to meet the parents is making waves on social media.
It’s an old story, dramatized in a 2008 HSBC campaign. When washing machines were first introduced in India, they were slow to pick up because of the irregular electricity, limited water and cheap domestic labor. Except in the state of Punjab. Nouveaux riche farmers, it seemed, were eager adopters. A market visit revealed little cause to celebrate. The machines were being used to make the yoghurt drink lassi, not to wash clothes.

The campaign illustrated the potential for misunderstanding when the subtleties of local market communications are ignored. This lesson is especially relevant in India where people have distinctive ways of socializing. And today, with the rise of social media, those distinctive behaviors happen both offline and online.

The washing machine legend is often invoked in marketing discussions as a warning to those who would seek to lead Indian consumers. Much like our sacred cows, we go our own way. Any questioning into the myths and wherefore always results in our infamous half-nod-half-shake with a “we are like that only.” As Rama Bijapurkar says in the preface to her book, “India and Indians aren’t going to become like someone else or someone else, but will continue to march down their own road to their own future destination.”

So why would social media be any different? Granted that the Internet population is still a drop in the Indian demographic, but even this niche tends to behave in a recognizably Indian manner online. Empowered Indians feel comfortable engaging with the globalized world on their own terms. Offline attitudes, behavior and relationships are not merely replicated but also complement those displayed online. Here are some basic insights about Indian socializing:

1. EVERY TYPE OF FRIEND IS IMPORTANT
Airtel’s “friendship” campaign in 2011 touched a chord not just with youth but also with consumers in every age segment. Everyone is a friend, we insult very few with the term “acquaintance.” So we have our school and college friends, our building friends, our early childhood buddies, our work friends even our family friends. While most of these may join us online, social media platforms help us reach out and make even more friends. The online world is like an endless dinner party to scope out more friends. Thus we now have Facebook friends, LinkedIn friends, and even online gaming friends.

2. WE RARELY HOLD BACK ON EXPRESSING OUR OPINIONS
We like to ask questions and air opinions about everything without much heed to political correctness or any other reservations. It can seem intrusive but we’re unabashed about it. Offline, our reach is restricted but online everyone is fair game. Many celebrities have realized this the hard way, especially on Twitter.

3. EVERYTHING IS BETTER TOGETHER
Doing things alone is not a general practice in India. There is a preference to be together as often as possible. Sure, a rarefied few might catch a meal or a movie alone but they are aware of the judgment directed their way, so they try to look less alone, seeking company in a book or a device. We are safety in numbers online too. Rather than avoid our parents on Facebook, we’re the ones who help them get there, as the YouTube series “Tech Conversations with My Dad” demonstrates. In collaboration, Airtel and India’s TVF comedy network show fathers phoning their grown children to ask technical questions at inconvenient times. For example, during an intimate dinner, when a man is about to propose, his mobile rings.

4. WE DON’T LIKE TO FOLLOW DIRECTIONS
We like to figure things out. And it’s our friends who help and guide us rather than some nameless tech support. Blackberry always positioned itself as a business phone but its earlier sales surge in India was actually driven by college students who saw the value in its free BBM messaging service as a way to stay in constant touch with their friends. This was before WhatsApp and Facebook’s mobile app were available. Vodafone showcased this in its popular “Blackberry Boys” ad in 2010.

5. IT’S NEVER EITHER-OR, ALWAYS BOTH
Just because we’re modernizing doesn’t mean we have let go of traditions. In fact, technology can be a catalyst for reviving and refreshing traditions we reluctantly left behind. A lot of the early and bigger successes in the technology space have catered to quintessentially Indian needs. Examples include: Shaadi.com and other online matchmaking portals, live streaming of weddings, puja prayer ceremonies and other rituals, along with websites and apps that help with everything from putting together janam kundalis, Vedic horoscopes, to moon viewing on the festival of Karva Chauth.

6. WE DON’T LET GO OF THE OLD JUST BECAUSE WE HAVE SOMETHING NEW
Last year, a popular Indian actress demonstrated that an embarrassing moment on TV can be laughed off online. When quizzed on a talk show about the name of the president of India, she mistakenly named a dead person. But the young actress proved smart enough to cooperate with the “All India Bakchod,” an edgy YouTube program, for a video in which she made fun of herself. The video helped increase her popularity, which motivated more celebrities to get into online videos. The real lesson here is that TV and YouTube don’t need to compete for eyeballs.

They can complement each other. TV, thanks to popular reality shows, still has value for group viewing situations. The conversations it sparks can be continued online, where there is less censorship and much demand for more straight-talking and irreverent humor.
Smollan is an international retail solutions company. Focused on Brand Building:

Immaculate in-store execution

retail sector

will benefit Indian brand owners and the complex retail sector

The concept of shopper marketing evolved out of the realization that influencing the shopper at the point of purchase is likely to lead to greater sales for brand owners and retailers.

Shopper marketing is essentially about understanding how the target shopper behaves in various channels and retail environments, and using these insights to favorably influence purchase decisions by enhancing in-store experience.

The interesting premise here is that the shopper is a different entity from the consumer, and hence merits an extended marketing approach. The shopper and consumer might be different individuals, such as when parents shop for baby-food. Second, the consumer has a brand preference, often built or strengthened by traditional marketing activities, when she is in the moment and actual process of consuming; she moves from brand to brand as her needs and priorities change.

In the store environment, brand preference and affinity is put to test by a host of internal and external factors: the sheer variety of available products, the clutter of competing brand communication, deals and promotions on the shop floor, the need state of the shopper, inertia of habit and comfort, paucity of time. Studies have shown that while brand loyalty plays an important part in the choice of products, in-store elements, such as visual merchandising, in-store advertising, and assisted selling by product advisors, play a key role in helping shoppers choose one brand over others at the point of purchase.

Shopper marketing is all about making the brand find its way into the shopping cart. It is a concerted strategy, for integration of brand strategy and communication along the path to purchase, culminating in, and entirely dependent on, flawless in-store execution. Hence, the essential elements are created by a partnership of the marketing team and the retail partner who collaborate to create the 360-degree brand experience on the shop floor, and the activation team that has to ensure perfect execution at the point of purchase.

Shopper engagement: The Indian context

In India, the vast complexities of the retail environment present both opportunities and challenges for in-store execution. The benefit for brand owners and retail is potentially limitless; there are over one billion consumers who will need to shop for their daily needs and indulgences.

The challenge, however, is in the vast heterogeneity of the population in taste and preferences, particularly in food and personal care. The opening up of the economy has exposed the shopper to a crowd of competing brands, many of which have realized that in-store marketing is the key that could move brands from the consideration set, where traditional media has placed them, into the purchase basket of the increasingly evolved and discerning shopper.

In-store shopper engagement programs, such as assisted selling, give brand owners and retailers the flexibility of putting the value proposition right there where the shopper is, making the communication focused and meaningful to the target segment. In India, for example, sampling activities for food and grocery would be the most effective way to engage shoppers and generate trials and sales, given the huge diversity and heterogeneity of tastes and preferences across individuals and communities. Empirical data suggests that differential growth and market-share gain of brands in promoted sales stores could be two-to-five times greater than in non-promoted stores.

The relative affordability of such promoted selling programs, over that of traditional brand-building activities, have also made it possible for new launches or niche categories or brands that lack the wherewithal for large marketing investments to generate awareness and trials. These programs make it feasible to educate the target shopper, effectively on a one-to-one basis, at a significantly lower cost of customer contact and acquisition.

Anecdotal evidence would support the premise that we as Indians are more inclined to "hear" rather than to "see." Perhaps because we have navigated through life largely unaided by maps or signage, and because there has always been someone at hand to ask, we are unashamedly an aural rather than a visual society.

Also, in India, over 90 percent of retail takes place through traditional general trade outlets, where lack of space, and perhaps of planning, frequently keep the merchandise well out of sight or reach of the shopper. The emergence of modern trade and self-service outlets, as well as the increasing understanding of the general trade of the benefits of shopper engagement programs, have made such programs feasible and desirable on a sustained basis.

Engagement success requires flawless in-store execution

The cornerstone of all shopper engagement activity is flawless in-store execution, the lack of which could render the entire effort merely a check box item. It is the prowess of execution that translates the brand promise and value proposition into a tangible theme for the shopper to embrace and acknowledge.

The in-store execution entity, in order to deliver immaculate service, needs to possess a deep, organizational capability in creating large, energized and well-trained field forces, and an execution orientation uplifted by an end-to-end technology-enabled value chain that supports strong systems and processes geared towards clearly defining, measuring, monitoring, and rewarding key performance parameters.

It requires the ability to recruit, train, energize, motivate continuously and retain vast numbers of promoters and sales advisors who will make that vital final connection between the brand and the shopper, as well as the supervisory field force that will ensure delivery of the required level of service.

Part 5

The India Top 50 - Brand Building Best Practices

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Leading solutions in field sales and retail execution, activation, and information and technology.

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Krishnakoli Sengupta Kumar

Head of Marketing

Smollan India

Krishnakolisi@smollan.co.in

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Krishnakoli Sengupta Kumar

Head of Marketing

Smollan India

Krishnakolisi@smollan.co.in
Brands need to adjust traditional marketing to reach rising number of social media users

Social media is a massive conversation, not simply another channel

Brands need to adopt new marketing rules for a game that’s changed in many ways. For example, consumer experience no longer means experience with the product alone. It means experience with the brand, which includes a lot of touchpoints offline and online. The 30-second TV spot has become the short digital film ad. Customer service is no longer a department or desk. Customers are complaining and engaging directly with the brands on social media. Segmenting and targeting happens in real time. Branded content is mainstream.

In addition, with limited control over self-published consumer content, media management is a whole new domain. Marketing strategy needs a 360-degree perspective with elements that include a brand strategy, media strategy, communication strategy and a social media strategy. Social media strategy isn’t about replicating traditional strategy online. To begin with, brands perhaps need to look at social media as one massive conversation, not just another channel or medium in the media mix. They can capitalize on these conversations and engage with their audiences for several purposes, from simply creating brand awareness to recruiting, conducting research, generating leads, providing customer service, managing reputation, building community engagement, and driving direct consumer connections.

Many brands have begun to realize this social media potential and are investing in social media and dialing up their social media savviness. They are consciously allocating more of their marketing investment to digital advertising and adding in-house social media experts.

But it is difficult to say what maturity levels Indian categories and brands have reached in their digital media journey. Having a Facebook page and acquiring likes and fans is not equal to having a social media strategy. Engagement needs to move from simple brand communication to brand-consumer interaction. There are easily replicated, one-way communication models like contests, tutorials, promotions, viral videos. But engagement requires a different level of interaction.

Building brand-consumer interaction

Very much like traditional marketing, brands need to find where their consumers are and how to target them. Monitoring tools can identify social mentions in multiple languages. Facebook Insights can identify what regions the brand’s fans are in. Twitter Grader can look for relevant mentions. Monitoring tools can identify consumers are and how to target them. Very much like traditional marketing, brands need to find where their consumers are and how to target them. Monitoring tools can identify social mentions in multiple languages. Facebook Insights can identify what regions the brand’s fans are in. Twitter Grader can look for relevant mentions.

Grader can look for relevant mentions. Google Trends can also find relevance of regions the brand’s fans are in. Consumer complaints and harsh judgments happen. Mistakes are immediately transparent. Rapid response to negative posts is critical. Brands need to refine their customer service and crisis management abilities.

1. CREATE A VARIETY OF CREATIVE CONTENT

The success of two-to-three minute ads, branded content and brand placements in short movies going viral, proves that consumers are open to different consumption formats, and in fact expect different content online.

2. CUSTOMIZE THE CONTENT FOR EACH CHANNEL

Content needs to be customized to the channel. While Facebook is clearly still the dominant platform, brands also need to introduce themselves on YouTube, Twitter, Instagram and Pinterest. Each medium requires different content and different strategies. Brand custodians need to move up this learning curve fast.

3. REFRESH THE CONTENT TO PROLONG ENGAGEMENT

Refreshing content can sustain increased engagement. This requires creating and curating device agnostic content for integrated campaigns and across channels. Content creation and curation is becoming a whole new science and brands need to employ specialized scientists in this field.

4. RESPOND RAPIDLY TO CONSUMER COMMENT, GOOD OR BAD

While there are many advantages of social media, there’s also a downside. Bad news travels as fast as good news. This factor can work against all brands. Consumer complaints and harsh judgments happen. Mistakes are immediately transparent. Rapid response to negative posts is critical. Brands need to refine their customer service and crisis management abilities.

5. MEASURE EFFECTIVENESS TO MAXIMIZE INVESTMENT

As social media budgets increase, brands will need sophisticated understanding of the effectiveness of their social media activities in order to optimize their social media investment. Brands need to devise systems that track in real time and are adaptable, flexible and device and channel agnostic.
THE INDIAN DREAM OF GREATER EQUALITY IS NOT NEW.

BUT REALIZING IT HAS BEEN A WORK IN PROGRESS.
Brands gain power by shifting from consumer engagement to consumer empowerment

Brands with a higher purpose break through the competitive clutter

What does Tata Tea have to do with young people registering as voters? The connection comes from the ability of the brand to move from a generic tea benefit (“wakes you up”) to an emotionally engaging one (“awakens you”).

Taking this idea a step further, the brand then went on to develop a website that helped those who had turned 18 to register as voters. In a manner relevant to the brand, Tata advanced the idea that awakened citizens are engaged citizens and voting in elections is a simple but powerful way to participate in a democracy.

In a cluttered competitive environment, brands like Tata are able to transcend the product battle by speaking the language of empathy and empowerment. What makes their approach worth noticing? Brands that strive to solve a real problem in consumers’ lives are well-placed to rise above their competition.

Figuring out how your brand can seek to empower its audience should start with the answer to a few questions. What are the biggest problems in consumers’ lives today? What can your brand do to solve them over and above delivering the physical and emotional benefits of your product? What societal tension can your brand credibly address and resolve? What is your brand’s bigger purpose?

Adopting a stance of consumer empowerment rather than just consumer engagement helps your brand go beyond just ads. It converts opportunities to communicate into opportunities to act. Brands are remembered for their actions, not only their campaigns.

Purpose benefits consumers and brands

Unilever’s Project Shakti created many women entrepreneurs by appointing them as retailers for their products in rural areas where the company’s traditional distribution was not viable. Apart from positively impacting women’s lives, the company was also able to gain a lot of media coverage and become the subject of discussion among stakeholders and the public – a benefit that money can’t buy.

Consumers are less likely to tune out actions that relate to improving their lives. They will be more receptive to messages addressing real-life topics rather than simply selling products. A newspaper that advocated for a “No TV Day” engaged with audiences by taking on a consumer concern about excessive TV watching. The idea also was a clever way for the newspaper to take a dig at its biggest competitive threat at the time, TV news.

An empowerment approach can dramatically raise public awareness not just of the brand, but also of important social issues. By building wheelchair ramps, a leading floor tile brand advocated for equal access. Similarly, the ads of a leading laundry detergent brand created awareness of equal sharing of household work between men and women. Competitors would be loath to undertake a similar exercise. This presents an opportunity to strongly “own” a particular concept in the consumer mind. So when Dove talks about “real beauty” and delivers on by creating a program of self-esteem education for young people, it is difficult for a competitor to even attempt something similar.

Taking up a particular cause also helps to create a multiplier effect as the campaign rolls out over time, across different geographies and to additional audiences.

Actions for advancing consumer empowerment

1. INVEST TIME AND MONEY
A sincere, empathetic attempt will pay off in the longer term. In contrast, consumers can smell an insincere effort from a mile away.

2. SOLVE A REAL PROBLEM
Success strongly depends on how deeply the initiative is able to touch the consumer.

3. GO BEYOND MESSAGING
An empowerment campaign could remain just an advertising message, but if you effect change in real life you’ll be more successful.

4. IDENTIFY A BRAND-RELEVANT PURPOSE
While there is no dearth of problems to be solved or lives to be touched, it is best to focus on a purpose that connects with your brand.

5. MAKE CONSUMERS YOUR ADVOCATES
The right audience appeal will build grass-roots support to ensure that the initiative gains a life of its own.

6. ADOPT THE RIGHT METRICS
It’s important to measure the success of consumer empowerment initiatives, but it requires more than metrics commonly used for sales or brand awareness.
When building a great brand, delivery becomes much more than simply an afterthought.

It can cultivate repeat customers or produce disappointment.

Marketing is the arsenal of strategies and tactics that every brand uses to expand, impress and lure the elusive mind of the consumer. Technology provides new ways to remind the consumer how she can make her life easier, get discounts and find the best for her family. But is this enough to make the consumer a satisfied and repeat customer?

No. All this communication is a good first step, but it’s only a first step. When Flipkart launched its first flash sale the e-commerce site got a lot of eyeballs, interest and sign ups. However, the opportunity failed to deliver. Instead, irate consumers, whose orders were abruptly cancelled by the overheated server, had to be calmed by a public apology.

Whether you are product oriented or service based, your brand promise lives and dies by your ability to deliver. The final leg of brand experience is delivery. Ensuring a product is delivered as promised can make or break a brand.

Establish reliable logistical systems. Set realistic customer expectations. Attempt to execute flawlessly. Here are five steps we recommend for staying on top of the game:

1. INVEST IN A PLATFORM THAT UNITES
   A strong platform helps you to curate content and provides endless opportunities to personally connect with the consumer. Unilever created such a platform that transformed a feature phone into a personal entertainment station where the brand enjoyed sole advertising rights. Consumers connecting to a toll free number had access to four-to-five minutes of entertaining clips and exposure to ads for Unilever’s flagship brands. This initiative resulted in high engagement, positive consumer reaction and a healthy revenue increase for Unilever. In urban markets, car services Uber and Ola have connected instantly with the consumers via convenient apps that even pinpoint pick-up locations.

2. MAKE IT PERSONAL
   Talking to the consumer in a language that directly addresses her gives you an edge. When Ola launched in Chennai, the taxi service app included the tuk-tuks, the three-wheel auto rickshaws that are popular in India. This initiative created buzz in the cost sensitive market. Invest in people and tell them the importance of being courteous and calm when dealing with the consumer.

3. STICK TO YOUR BRAND PROMISE
   While engaging the consumer you’ve raised expectations about the brand. Make sure the brand delivers on its promise. When Domino’s launched its pizzas in India the brand was touted as the poor cousin of its rivals. The brand focused on speed, promising 30-minute delivery or the meal is free. Today, the chain has twice the number of Indian outlets as McDonald’s.

4. COMMUNICATE CONTINUOUSLY
   Use every viable medium of communication to keep the consumer abreast of your offering and the status of their order(s). Make sure you include information so that the consumer is clear about how to reach you. Ensure that the brand is present across platforms popular with your customers.

5. USE BIG DATA
   In this connected world, we have data flowing from every touch point. Invest wisely in analytics to understand consumers and to draw intelligence about their delivery needs and requirements. Be careful to use big data in ways that improve customer service without being too intrusive.

Narayanee Viswanathan
Account Director
Millward Brown
Narayaneeyviswanathan@millwardbrown.com

Millward Brown is a leading global research agency specializing in advertising effectiveness, strategic communication, media and brand equity research. Millward Brown helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions.

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Our Insights

No one can ignore or overlook the sudden boom of the e-commerce in the last few years. With the ever-increasing number of websites selling everything from furniture to groceries, electronics to designer clothes, there is almost nothing that cannot be bought online today. So while retailers are going all-out to attract consumers to their outlets so that they can embrace the street, or online on Flipkart, Myntra, Jabong and similar online brands need to understand how consumers select among diverse shopping options is critical for modern-day marketers in arriving at an optimal channel mix for building and sustaining a loyal customer base.

In this period of increasing competition, brands need to understand how consumers are using these channels. Consumers see every channel as a solution for their varied needs in different situations. Understanding how consumers select among diverse shopping options is critical for modern-day marketers in arriving at an optimal channel mix for building and sustaining a loyal customer base.

Fashion has been clubbed with words like ‘oppression’ and ‘victims,’ but recently fashion has started empowering Indian women. For young women in smaller towns, fashion is not only a means to be on par with their cosmopolitan counterparts, but is also a way of feeling empowered and confident. For sources of inspiration young women turn to reality TV shows, Instagram, Pinterest, make up tutorials on YouTube, Indian and international fashion blogs, and beauty apps.

These women may have money but they lack fashion awareness, so they turn to these sources for ideas to enhance their personal style and fulfill their desire to stand out. Young women also tend to buy more for less by shopping on the street, or online on Flipkart, Myntra, Jabong and similar online outlets so that they can embrace fast fashion and be trendsetters themselves. In a time of constantly changing fashion, staying up-to-date with what they wear gives these women the opportunity and means to empower themselves.

The next growth driver for the FMCG in India is the ‘live events’ space. From the time an event is announced to the time it is executed, every leg of the journey presents itself as an opportunity for a consumer brand to engage. Live entertainment serves as an avenue to build, sustain and engage audiences. Live events like VH1 Supersonic or Sunburn concerts offer significant opportunities for categories like beauty and personal care, including sunscreen, moisturizers or even mosquito repellents, along with the usual suspects—energy drinks, refreshments or fashion accessories.

Live events also present marketers with an opportunity to recruit new customers. Live music events are ideal for marketers who want their niche products to be sampled by first-time users. For instance, a tissue brand that is looking to capture the 14-to-20 age group could launch its new variant at a New Year ‘sundowner’ in Goa.

Driven by changing consumer expectations and a desire to participate in advancing the common welfare of India, marketers increasingly support social responsibility initiatives that are relevant to their brands. In a recent campaign, Ching’s Secret, a Chinese food popular in India, collaborates with Yash Raj Films on short video for the Akshaya Patra Foundation, which provides school lunches. The video asks people to donate a small amount that will feed a child for an entire year and help ensure that hunger does not prevent children from getting an education.

The popular video is just one example of the many brands that have come forward and showcased their support for various social issues prevalent in India. Branding with a social purpose or a cause not only enhances the brand image but also extends awareness for the cause beyond the target audience.

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Fashion has been clubbed with words like ‘oppression’ and ‘victims,’ but recently fashion has started empowering Indian women. For young women in smaller towns, fashion is not only a means to be on par with their cosmopolitan counterparts, but is also a way of feeling empowered and confident. For sources of inspiration young women turn to reality TV shows, Instagram, Pinterest, make up tutorials on YouTube, Indian and international fashion blogs, and beauty apps.

These women may have money but they lack fashion awareness, so they turn to these sources for ideas to enhance their personal style and fulfill their desire to stand out. Young women also tend to buy more for less by shopping on the street, or online on Flipkart, Myntra, Jabong and similar online outlets so that they can embrace fast fashion and be trendsetters themselves. In a time of constantly changing fashion, staying up-to-date with what they wear gives these women the opportunity and means to empower themselves.
Resources
INDIANS EMBRACE THEIR HERITAGE WITH PRIDE AND CONFIDENCE.
Introduction

The brands that appear in this report are the most valuable in India. They were selected for inclusion in the BrandZ™ Top 50 Most Valuable Indian Brands 2015 based on the unique and objective BrandZ™ brand valuation methodology that combines extensive and on-going consumer research with rigorous financial analysis.

The BrandZ™ valuation methodology can be uniquely distinguished from its competitors by the way we obtain consumer viewpoints. We conduct worldwide, on-going, in-depth quantitative consumer research, and build up a global picture of brands on a category-by-category and market-by-market basis.

Globally, our research covers three million consumers and more than 100,000 different brands in over 50 markets. This intensive, in-market consumer research differentiates the BrandZ™ methodology from competitors that rely only on a panel of ‘experts’, or purely on financial and market desktop research.

Before reviewing the details of this methodology, consider these three fundamental questions: why is brand important; why is brand valuation important; and what makes BrandZ™ the definitive brand valuation tool?

IMPORTANCE OF BRAND

Brands embody a core promise of values and benefits consistently delivered. Brands provide clarity and guidance for choices made by companies, consumers, investors and other stakeholders. Brands provide the signposts we need to navigate the consumer and B2B landscapes.

At the heart of a brand’s value is its ability to appeal to relevant customers and potential customers. BrandZ™ uniquely measures this appeal and validates it against actual sales performance. Brands that succeed in creating the greatest attraction power are those that are:

DIFFERENT

These brands are unique in a positive way and ‘set the trends’, staying ahead of the curve for the benefit of the consumer.

SALIENT

They come spontaneously to mind as the brand of choice for key needs.

IMPORTANCE OF BRAND VALUATION

Brand valuation is a metric that quantifies the worth of these powerful but intangible corporate assets. It enables brand owners, the investment community and others to evaluate and compare brands and make faster and better-informed decisions.

DISTINCTION OF BRANDZ™

BrandZ™ is the only brand valuation tool that peels away all of the financial and other components of brand value and gets to the core – how much brand alone contributes to corporate value. This core, what we call Brand Contribution, differentiates BrandZ™.

MEANINGFUL

In any category, these brands appeal more, generate greater ‘love’ and meet the individual’s expectations and needs.

STEP 1: CALCULATING FINANCIAL VALUE

PART A

We start with the corporation. In some cases, a corporation owns only one brand. All Corporate Earnings come from that brand. In other cases, a corporation owns many brands. And we need to apportion the earnings of the corporation across a portfolio of brands.

To make sure we attribute the correct portion of Corporate Earnings to each brand, we analyze financial information from annual reports and other sources, such as Kantar Retail. This analysis yields a metric we call the Attribution Rate.

We multiply Corporate Earnings by the Attribution Rate to arrive at Branded Earnings, the amount of Corporate Earnings attributed to a particular brand. If the Attribution Rate of a brand is 50 percent, for example, then half the Corporate Earnings are identified as coming from that brand.

PART B

What happened in the past – or even what’s happening today – is less important than prospects for future earnings. Predicting future earnings requires adding another component to our BrandZ™ formula. This component assesses future earnings prospects as a multiple of current earnings. We call this component the Brand Multiple. It’s similar to the calculation used by financial analysts to determine the market value of stocks (Example: 6X earnings or 12X earnings). Information supplied by Bloomberg data helps us calculate a Brand Multiple. We take the Branded Earnings and multiply that number by the Brand Multiple to arrive at what we call Financial Value.

STEP 2: CALCULATING BRAND CONTRIBUTION

So now we have got from the total value of the corporation to the part that is the branded value of the business. But this branded business value is still not quite the core that we are after. To arrive at Brand Value, we need to peel away a few more layers, such as the in-market and logistical factors that influence the value of the branded business, for example: price, availability and distribution.

What we are after is the value of the intangible asset of the brand itself that exists in the minds of consumers.

That means we have to assess the ability of brand associations in consumers’ minds to deliver sales by predisposing consumers to choose the brand or pay more for it.

We focus on the three aspects of brands that we know make people buy more and pay more for brands: being Meaningful (a combination of emotional and rational affinity), being Different (for at least feeling that way to consumers), and being Salient (coming to mind quickly and easily as the answer when people are making category purchases).

We identify the purchase volume and any extra price premium delivered by these brand associations. We call this unique role played by brand, Brand Contribution.

Here’s what makes BrandZ™ so unique and important. BrandZ™ is the only brand valuation methodology that obtains this customer viewpoint by conducting worldwide on-going, in-depth quantitative consumer research, online and face-to-face, building up a global picture of brands on a category-by-category and market-by-market basis. Globally, our research now covers over three million consumers and more than 100,000 different brands in over 50 markets. In India, our research includes over 100,000 consumers and more than 1,000 different brands.

STEP 3: CALCULATING BRAND VALUE

Now we take the Financial Value and multiply it by Brand Contribution, which is expressed as a percentage of Financial Value. The result is Brand Value. Brand Value is the dollar amount a brand contributes to the overall value of a corporation. Isolating and measuring this intangible asset reveals an additional source of shareholder value that otherwise would not exist.

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Why BrandZ™ is the definitive Brand valuation methodology

All brand valuation methodologies are similar – up to a point. All methodologies use financial research and sophisticated mathematical formulas to calculate current and future earnings that can be attributed directly to a brand rather than to the corporation. This exercise produces an important but incomplete picture.

What’s missing? The picture of the brand at this point lacks input from the people whose opinions are most important – the consumer. This is where the BrandZ™ methodology and the methodologies of our competitors part company.

HOW DOES THE COMPETITION DETERMINE THE CONSUMER VIEW?

Interbrand derives the consumer point of view from panels of experts who contribute their opinions. The Brand Finance methodology employs a complicated accounting method called Royalty Relief Valuation.

WHAT’S THE BENEFIT OF BRANDZ™?

The BrandZ™ methodology produces important benefits for two broad audiences:

• Members of the financial community, including analysts, shareholders, investors and C-suite, depend on BrandZ™ for the most reliable and accurate brand value information available.
• Bank brands derived at least 25 percent of earnings from retail business.

Eligibility criteria and definitions

ELIGIBILITY

The brands included in the BrandZ™ Top 50 Most Valuable Indian Brands 2015 report meet two eligibility criteria:

• Brands are owned by an enterprise listed on a stock exchange in India.
• Bank brands derived at least 25 percent of earnings from retail business.

DEFINITIONS

BRAND CONTRIBUTION
Brand Contribution is a BrandZ™ measurement of a brand’s uniqueness in the mind of the consumer and the impact of brand alone, without any other factors, on future earnings.

• Brands are owned by an enterprise listed on a stock exchange in India.
• Bank brands derived at least 25 percent of earnings from retail business.

BRAND POWER
Brand Power is a BrandZ™ measurement of a brand’s competitive position in its category. It roughly correlates with volume share. Brand Power is a BrandZ™ component of brand equity, which is the consumer predisposition to choose one brand over another.

MEANINGFUL, DIFFERENT, SALIENT
These are the three BrandZ™ components of brand equity: Meaningful, Different and Salient. Success on these components predisposes consumers to choose a brand and pay a premium for it.

Meaningful
Consumers feel an affinity for the brand or think it meets their needs.

Different
The brand feels different to other brands in the category, or sets trends for the category.

Salient
The brand comes to mind quickly and readily when activated by ideas related to category purchase.
BrandZ™: The ultimate resource for brand knowledge and insight

BrandZ™ Top 100 Most Valuable Global Brands 2015
This is the definitive global brand valuation study, analyzing key trends driving the world’s largest brands, exclusive industry insights, thought leadership and a retrospective look at 10 years of BrandZ.

BrandZ™ Top 100 Most Valuable Chinese Brands 2015
The report profiles Chinese brands, outlines major trends driving brand growth and includes commentary on the growing influence of Chinese brands at home and abroad.

BrandZ™ Top 50 Most Valuable Indonesian Brands 2015
This new study analyses the success of Indonesian brands, examining the dynamics shaping this fast-emerging market and offering insights for building valuable brands.

The Chinese New Year in Next Growth Cities
The report explores how Chinese families celebrate this ancient festival and describes how the holiday unlocks year-round opportunities for brands and retailers, especially in China’s lower tier cities.

The Chinese Golden Weeks in Fast Growth Cities
The report profiles the most valuable brands of Argentina, Brazil, Chile, Colombia, Mexico and Peru and explores the socioeconomic context for brand growth in the region.

For the iPad magazine, search BrandZ Latin America on iTunes.

The Power and Potential of the Chinese Dream
“The Power and Potential of the Chinese Dream” is rich with knowledge and insight, and forms part of a growing library of WPP reports about China. It explores the meaning and significance of the ‘Chinese Dream’ for Chinese consumers as well as its potential impact on brands.

Value-D
Balancing Desire and Price for Brand Success
Desire is primary. High Desire enables Price flexibility. A new metric, Value-D, measures the gap between the consumer’s Desire for a brand and the consumer’s perception of the brand’s Price. By quantifying this gap, Value-D helps brands optimize their profit and market-positioning potential.

RepZ
Maximising Brand and Corporate Integrity
Major brands are especially vulnerable to unforeseen events that can quickly threaten the equity cultivated over a long period of time. But those brands with a better reputation are much more resilient. Four key factors drive Reputation: Success, Fairness, Responsibility and Trust. Find out how your brand performs.

CharacterZ
Brand personality analysis deepens brand understanding
Brand personality analysis deepens brand understanding. Need an interesting and stimulating way to engage with your clients? Want to impress them with your understanding of their brand? A new and improved CharacterZ can help! It is a fun visual analysis, underpinned by the power of BrandZ™, which allows detailed understanding of your brand’s personality.

TrustR
Engaging Consumers in the Post-Recession World
Trust is no longer enough. Strong brands inspire both Trust (belief in the brand’s promise developed over time) and Recommendation (current confirmation of that promise). This combination of Trust plus Recommendation results in a new metric called TrustR.

Get the BrandZ™ Top 100 Most Valuable Global Brands, Chinese Top 100, Latin American Top 50, Indonesian Top 50 and many more insightful reports on your smartphone or tablet.

To download the apps for the BrandZ™ rankings go to www.BrandZ.com/mobile (for iPhone and Android). BrandZ™ is the world’s largest and most reliable customer-focused source of brand equity knowledge and insight.

To learn more about BrandZ™ data or studies, or view one of our industry insight videos, please visit www.BrandZ.com, or contact any WPP company.
DETERMINED BY WHERE YOU BEGIN THE JOURNEY.

"HOW FAR YOU TRAVEL IN LIFE IS NO LONGER COMPLETELY DETERMINED BY WHERE YOU BEGIN THE JOURNEY."

"
These companies contributed knowledge, expertise and perspective to the report.
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Landor

**LANDOR**

As a global leader in brand consulting and design, Landor helps clients create agile brands that thrive in today’s dynamic, disruptive marketplace. Our work enables top brands—from Barclays to BMW and Tide to Taj—to stand for something while never standing still.

Landor’s branding services include strategy and positioning, identity and design, brand architecture, prototyping, innovation, naming and verbal identity, research and analytics, environments and experiences, engagement and activation, and interactive and media design.

Founded by Walter Landor in 1941, Landor pioneered many of the research, design, and consulting methods that are now standard in the branding industry. Today, Landor has 27 offices in 25 countries, working with a broad spectrum of world-famous brands. Clients include Maspar; Café Coffee Day; ICICI Bank; Jet Airways; Lavasa; Mahindra; The Park Hotels; Reliance ADAG; Taj Group; Tata Global Beverages; and World Gold Council.

Landor is a member of the Young & Rubicam Group within WPP, the world’s largest communications services group with billings in 2013 of $72.3 billion and revenues of $17.3 billion. Through its operating companies, the Group provides a comprehensive range of advertising and marketing services including advertising and media investment management; data investment management; public relations and public affairs; branding and identity; healthcare communications; direct, digital, promotion and relationship marketing and specialist communications. The company employs over 179,000 people (including associates) in over 5,000 offices across 121 countries. For more information, visit www.landor.com.

Lulu Raghavan
Managing Director
Lulu.Raghavan@landor.com

**MILLWARD BROWN**

Millward Brown is a leading global research agency specializing in advertising effectiveness, strategic communication, media and brand equity research. Millward Brown helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions. Specialist global practices include Millward Brown Digital (a leader in digital effectiveness and intelligence), FCB/Essex Millward Brown (our global qualitative network), a Neuroscience Practice (using neuroscience to optimize the value of traditional research techniques), and Millward Brown Vermeer (a strategy consultancy helping companies maximize financial returns on brand and marketing investments). Millward Brown operates in more than 55 countries and is part of Kantar, WPP’s data investment management division.

www.millwardbrown.com

Praurat Basu
Managing Director
Praurat.Basu@millwardbrown.com

**OGILVY & MATHER**

Ogilvy & Mather is one of the largest marketing communications companies in the world. It was named the Cannes Lions Network of the Year for four consecutive years, 2012, 2013, 2014 and 2015, and the Effe Index’s World’s Most Effective Agency Network for two consecutive years 2012 and 2013. Ogilvy Mumbai, the flagship office of Ogilvy & Mather India, continues to be the most awarded agency office in India, and has been named Most Effective Agency of the Year in Asia-Pacific 2014.

In India, Ogilvy & Mather is comprised of industry leading units in advertising, digital marketing, shopper and retail marketing, healthcare and public relations. Global Effie Index ranked O&M Mumbai 3rd and 4th Most Effective Agency in 2014 and 2015 respectively; again named Most Effective Agency of the Year 2014 in Effies India 2014. Need for Ogilvy India has won Best Mobile Agency in India 2015 by Effies. Ogilvy India has been named India’s No.1 Agency for 10 consecutive years by The Brand Equity Agency Reckoner. O&M services Fortune Global 500 companies as well as local businesses through its network of more than 500 offices in 126 countries.

www.ogilvy.com

Piyush Pandey
Executive Chairman & National Creative Director
Piyush.Pandey@ogilvy.com

**OGILVYONE WORLDWIDE**

OgilvyOne Worldwide is the world’s leading Customer Engagement Agency, as ranked by Forrester Research, Inc. Our core promise to clients is to help them unlock the full value of customers. We do this by turning big ideas and data into personalized experiences to help our clients win more customers and make them more valuable. With over 100 offices in more than 50 countries, we are one of the industry’s most highly awarded agencies. The roster of clients is equally balanced between global clients including American Express, BlackRock, British Airways, DuPont, IBM, Interscience, Hotel Group, IKEA, Kimberly-Clark, Nestlé, Unilever and UPS and leading clients in our local markets. OgilvyOne Worldwide is a unit of Ogilvy & Mather, a WPP company (NASDAQ: WPPGY), one of the world’s largest communications services groups. OgilvyOne India has been named No.1 Digital Agency in India; it has also earned the title of 5th Smartest Digital Agency Worldwide by WARC in 2015.

www.ogilvyone.com

Vikram Menon
President
Vikram.Menon@ogilvy.com

**SMOLLAN**

Smollan is an international retail solutions company. Focused on perfecting retail and shopper experiences, we are the pivot point where the retailer, brand owner and shopper intercept. We deliver growth for retailers and brand owners across five continents through leading solutions in field sales and retail execution, activation, and information and technology.

With extensive industry experience, an exceptional human platform and sophisticated systems, Smollan has provided consistent excellence in operational execution for three generations.

www.smollan.co.in

Rajan Zachariah
CFO, CEO - HFS Unilever
Rajan.Zachariah@smollan.co.in

**SOCIAL WAVELENGTH**

Social Wavelength is India’s leading social-first digital agency. Social Wavelength partners with clients to build social and digital solutions which help them achieve their business goals. Their offerings range from Social Media Communications, Social Listening, Digital Media planning and buying, and Digital content and technology production.

We also run the region’s largest Social Media Command Center - a 24x7 Social Listening operation, dedicated to listening to Social Conversations for our clients, and taking action and deriving intelligence from the same.

www.socialwavelength.com

Sanjay Mehta & Hareesh Tibrewala
CEOs
Sanjay.Metalia@socialwavelength.com
HareeshTibrewala@socialwavelength.com

**WPP**

WPP is the world’s largest communications services group with billings, in 2013 of $72.3 billion and revenues of $17.3 billion. Through its operating companies, the Group provides a comprehensive range of advertising and marketing services including advertising and media investment management; data investment management; public relations and public affairs; branding and identity; healthcare communications; direct, digital, promotion and relationship marketing and specialist communications. The company employs over 179,000 people (including associates) in over 5,000 offices across 121 countries. For more information, visit www.wpp.com. WPP was named Holding Company of the Year at the 2014 Cannes Lions International Festival of Creativity for the fourth year running. WPP was also named, for the third consecutive year, the World’s Most Effective Holding Company in the 2014 Effie Effectiveness Index, which recognizes the effectiveness of marketing communications.

www.wpp.com

For further information about BrandZ™ contact any WPP Group company or visit www.brandz.com.
These individuals from WPP companies provided additional thought leadership, research, analysis and insight to the report.

- Jasmin Agarwal, Ogilvy & Mather
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- Nisha Gammeri, Ogilvy & Mather
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- Sujit Gupta, Millward Brown
- Varitka Hali, Firefly Millward Brown
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- Siddharth Hoskote, Millward Brown
- Raman Iyer, Contract
- Shraddha Jadhav, Millward Brown
- Aditi Jain, J. Walter Thompson
- Aparna Jain, Ogilvy & Mather
- Warsh Jain, Millward Brown
- Dinesh Kapoor, Millward Brown
- Ashish Karnad, Millward Brown
- Saurabh Karve, Millward Brown
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- Shadiya Khan, J. Walter Thompson
- Divya Sharma, J. Walter Thompson
- Kaveri: Kishnagar, Millward Brown
- Vishwasao: Sengupta Kumar, Smollan
- Siddharth: Lahiri, J. Walter Thompson
- Gaurav: Mehta, Millward Brown
- Parnika: Mehta, Millward Brown
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- Sakina: Pitalwala, Firefly Millward Brown
- Mousumi: Prasad, Millward Brown
- Chandana: Raizada, J. Walter Thompson
- Sandeep: Ranade, Millward Brown
- Sheryll: Roche, Ogilvy & Mather
- Saloni: Sabnis, Millward Brown
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- Shiyta: Sengupta, Ogilvy & Mather
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- Atul: Sharma, Genesis Burson-Marsteller
- Pawan: Singh, Millward Brown
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Cecilie Østergren
David Roth
Ken Schept
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Amandine Bavent
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We help build valuable brands

Our WPP companies have been engaged in India for more than 85 years. Today, 14,000 people including associates work in 64 companies and 266 offices across India, in Mumbai, Delhi, Bangalore, Chennai, Kolkata, Hyderabad and many other cities.

They provide the advertising, marketing, insight, media, digital, retail, shopper marketing, PR, knowledge, insight, and implementation necessary to understand Indonesia and build and sustain brand value. To learn more about how to apply this expertise to benefit your brand, please contact any of the WPP companies that contributed to this report or contact:

Ranjan Kapur
WPP Country Manager, India
Ranjan.Kapur@wpp.com

Belinda Rabano
Head of Corporate Communications, WPP Asia Pacific
Belinda.Rabano@wpp.com

For further information about WPP companies worldwide, please visit:
www.wpp.com/wpp/companies

or contact:

David Roth
CEO The Store, WPP EMEA and Asia
David.Roth@wpp.com