

AIRTEL/AMAZON/
ASIAN PAINTS/
BRITANNIA/FLIPKART/
GOOGLE/JIO/MAGGI/
MRF/PARACHUTE/
SPOTLIGHT
BRANDS IN INDIA
SAMSUNG/SURF EXCEL/
SWIGGY/TAJ MAHAL/
TATA HOUSING/TATA TEA/
YOUTUBE/ZOMATO

KANTAR BRANDZ

2021

1

WELCOME

- 04 - WELCOME
- 08 - WHAT IS KANTAR BRANDZ?

2

OVERVIEW

- 14 - KANTAR BRANDZ INDIA APPROACH FOR 2021
- 20 - INDIA'S MOST PURPOSEFUL BRANDS
- 22 - KEY TRENDS

3

THOUGHT LEADERSHIP

- 42 - SOUMYA MOHANTY OVERCOMING PURPOSE ANXIETY
- 46 - PREETI REDDY INCLUSIVE ADVERTISING
- 50 - K RAMAKRISHNAN PROVENANCE

4

BRAND BUILDER PERSPECTIVES

- 56 - PUNEET DAS TATA CONSUMER PRODUCTS
- 62 - SHALABH ATRAY, RUPEEK
- 68 - VIVEK SRIVATSA, TATA MOTORS
- 76 - SHUVADIP BANERJEE ITC LIMITED
- 80 - PRIYANKA BHARGAV, FLIPKART
- 84 - NITESH PRIYADARSHI HINDUSTAN UNILEVER LIMITED
- 88 - PUJA CHANDNA, KELLOGG'S
- 92 - SUSHMA BARALAY, MONDELEZ

5

FUTURE FOCUS

- 98 - PARU MINOCHA & MACNEIL CHOWDHURY SUSTAINABILITY
- 102 - PUNEET AVASTHI THE DIGITAL DIVIDEND
- 106 - ANAND PARAMESWARAN DIGITAL-FIRST BRANDS

6

KANTAR RESOURCES

- 112 - KANTAR BRANDZ INDIA 2021 METHODOLOGY
- 122 - REPORTS & PUBLICATIONS
- 124 - PERSPECTIVES REPORTS
- 126 - OUR BRAND EXPERTS
- 130 - KANTAR BRANDZ TEAM
- 136 - ABOUT US/CONTACT US

LEAD WITH PURPOSE

STRONG BRANDS IN INDIA

STAND FOR MORE

The past two years have tested India – and Indian businesses – as never before. Amid so much turmoil and volatility, great sacrifices have been made, and great lessons have been learned. As India’s vaccination drive continues, people are once again looking forward to enjoying life and celebrating with their communities in person. And they’re doing so with a new awareness of what really matters.

At Kantar, our work with brands has similarly gained a new purpose: to aid in the rebuilding of an even more innovative and sustainable Indian economy. Post-pandemic, consumers and investors alike are holding brands to new and higher standards. For years, Kantar’s proprietary BrandZ™ data and modelling has shown how brand value derives from three core pillars of growth: **Meaningfulness**, **Difference**, and **Salience**. What we’ve found in recent months is that in India especially, perceptions of a brand’s **Purpose** – its ability to ‘make people’s lives better’ – are crucial to establishing a brand’s Meaningful quotient. And thus, to boosting prospects for growth.

It’s no surprise, then, that in the world of marketing, ‘Purpose’ has become something of a buzzword, even as it’s also become the source of no small anxiety for marketers. In the earliest days of COVID-19, ‘purposeful’ marketing meant hitting the same messages as everyone else: Wash Your Hands, Stay At Home, We’re In This Together. As India opens up, business and consumers are once again looking toward the future – and brands will need to articulate more unique visions of how exactly they plan to shape this future for the better.

This year’s BrandZ™ India report, our eighth, focuses squarely on this challenge – and on celebrating those Indian brands that have learned to truly “Lead with Purpose.” At Kantar, we’ve been tracking and analysing Purpose for years. We know that when done well, brand Purpose involves so much more than vague slogans and one-off ‘corporate charity’ events. It’s not about jumping on the bandwagon of the latest ‘cause du jour’: instead, real Purpose flows from, and builds on, your brand’s *existing* core values and DNA.

For proof and inspiration on this point, just look at the collection of brands that we’re honouring this year as standouts our consumer surveys of brand Purpose. They include storied names like Tata Tea, Asian Paints, and Maggi – as well as more recent entrants like Jio, Zomato, and Swiggy.



Reaffirming the Fundamentals

For Kantar and our clients, embracing Purpose starts with gaining a clear picture of ‘what already is’ – with mapping out and analysing the fundamental ‘building blocks’ of brand identity that we’ve been studying for years. Kantar’s proprietary BrandZ™ database includes information from over 3.9 million consumers about their attitudes about (and relationships with) 17,801 brands across 512 categories in 51 markets. All of that produces more than 5.3 billion data points. And with that data, comes insight.

In this year’s category-spanning, paradigm-shifting report, you’ll find the learnings you need to truly master Purpose in all its forms. You’ll learn, for instance, that the way Indian consumers think about Sustainability looks quite different from the way British or Japanese consumers do. You’ll learn how the evolution of Purpose has dovetailed with other major pandemic-era shifts in the Indian economy – from digital innovation to hyperlocal marketing. You’ll learn how post-pandemic shifts in consumers’ ‘value calculus’ is inextricably linked to their interest in supporting brands that stand for something more. And you will learn how to amplify purpose through communication that is authentic and a true dialogue with consumers.

Throughout the report, we have amplified our BrandZ™ data findings with Thought Leadership articles and Insights from Kantar’s brand building experts. We’ve also added interviews in which leaders from top Indian businesses like Tata Motors, Hindustan Unilever Limited, and Flipkart, in which they reflect on how Indian brands “pivoted to purpose” amid the many challenges of COVID-19.

Consider report is a starting point. I urge you to follow up with the experts who contributed to this publication. They continue to monitor macroeconomic, media, and shopper data as the Indian economy progresses on its road to recovery. And they are well-attuned to the shifts in consumer values and sentiments that have arisen amid the upheavals of the past few years. We also have an extensive library of BrandZ™ country reports that sit alongside our annual Global Top 100 report; in them, you will find intelligence about brand building in key markets such as China, France, and the United States. I invite to you access the reports with our compliments at Kantar.com/campaigns/brandz.

As the world moves forward after the shocks of COVID-19, brand offerings will both reflect and shape the changed reality that we all are living in. Brands’ products and services will have to meet new consumer needs for convenience, value, sustainability, and innovation – all of which ultimately contribute to perceptions of a brand’s Purpose. That’s where we at Kantar can help, as the world’s leading data and insights consultancy, with 30,000 people working with Kantar worldwide.

We help define and build meaningfully different brands with our holistic brand guidance approach that combines innovations, experiences, creative content, and media investment to optimise investment and accelerate profitable growth. At Kantar, we’ve pioneered a new suite of marketplace insight tools that can provide you with actionable consumer feedback on brand assets in a matter of days (or, in the case of our AI-powered Machine Learning analysis tools, even a matter of hours).

Using the vast Kantar and BrandZ™ reservoirs of intelligence, we can help you successfully navigate today’s uncertainty and make your messaging count. I am available to personally discuss how we can help you and your brand succeed—building valuable brands that add value to people’s lives. Please feel free to contact me directly or contact any of our Kantar leaders listed in the Resources section at the end of this report.

Sincerely,

Deepender Rana
Executive Managing
Director, South Asia
Insights Division
Kantar

deepender.rana@kantar.com



WHAT IS KANTAR BRANDZ ?

5.3 BILLION

3.9 MILLION

18,500

512

51

DATA
POINTS

CONSUMER
INTERVIEWS

BRANDS

CATEGORIES

MARKETS

THE
DEFINITIVE
GUIDE
TO BRAND
BUILDING

Kantar BrandZ™ ranks the best brands in the world... and shows you how to become one of them.

It is the world’s largest, consumer-focused source of brand equity insight, which also powers our proprietary brand valuation methodology.

Kantar BrandZ™ brings you industry-leading brand valuations, along with research from the world’s most extensive brand equity study: Almost 4 million consumer interviews covering 18,500 brands across 512 categories in 51 markets.

This brand valuation series began in 1998 to help researchers, planners and strategists better understand the brands they worked on. Our reports rank, analyse and honour the world’s top brands.

Kantar BrandZ™ has become a global standard brand value ecosystem, featuring our flagship Global Most Valuable Brands ranking and report. It also features country and regional rankings across six continents, and world-class thought leadership on building strong brands.

HOW DOES KANTAR BRANDZ™ WORK?

We start by examining relevant corporate financial data and stripping away everything that doesn't pertain to the branded business.

We also conduct ongoing, in-depth quantitative consumer research with more than 170,000 consumers annually, and globally, to assess consumer attitudes about, and relationships with thousands of brands.

Then a team of our analysts combine those inputs with a financial model of the business to determine the brand's ability to generate value.

The result is a holistic portrait of brand equity: one that incorporates how the market values a company's brand assets – and how ordinary people do, too.

Kantar BrandZ™ research data is uniquely linked to financial outcomes. Our analysis has repeatedly proven that businesses that invest in their brands outperform the market... and that investing in your brand remains the most powerful way to grow.

What's more, we can show you how our data and frameworks work to create a forensic portrait of a brand's strengths, weaknesses and opportunities, within one or many categories and markets.

Get essential insight on category trends and macroeconomic shifts – and how brands compare across crucial building blocks of brand value like Trust, Meaning, Innovation, Difference, and Responsibility.

STRONG BRANDS:

DELIVER SUPERIOR
SHAREHOLDER
RETURNS

ARE MORE RESILIENT
IN TIMES OF CRISIS

RECOVER MORE
QUICKLY

OVERVIEW

- 14 - KANTAR BRANDZ INDIA
APPROACH FOR 2021
 - 20 - INDIA'S MOST PURPOSEFUL
BRANDS
 - 22 - KEY TRENDS
-

LEADING BRANDS

LEAD WITH PURPOSE

Over the years, BrandZ™ has focused on understanding brands' ability to generate value by standing out from the pack. By drawing on a model that combines financial modelling with ongoing, in-depth quantitative consumer research, we have identified a set of enduring keys to brand growth.

The BrandZ™ India 2021 report looks broadly at the impact of the year's multifaceted volatility on Indian brands - with an in-depth focus across FMCG, Non-FMCG and Technology brands. For the first time, we are spotlighting the Most Purposeful Indian Brands across these business segments. In India and across the world, Purpose has emerged as one of *the* most important pillars of brand growth - and equally, of brand marketing.



Understanding Purpose

In BrandZ™ parlance, 'strong brands' are those that can drive repeat business and charge a market premium. Strong brands achieve this by being seen as both **Meaningful** (i.e., they "meet consumers needs in especially appealing ways"), and **Different** (i.e., they "set the trends").

What makes Purpose - the focus of this year's report - special is the way that it influences drivers of brand equity.

Let's start with Meaning. Today's consumers are embracing a more holistic definition of Meaningful value. Functional benefits and a great price still matter. Increasingly, though, brands must also explicitly address higher-order needs: things like reassurance, safety, connection, and hope for the future. In our digital age, people feel bombarded with the problems of the world - and want to feel like they're a part of a solution. That's the essence of **Meaningful Purpose**.

The key pillar

Like people worldwide, Indians have endured the trauma of the COVID-19 pandemic. At the heights of the First and Second Wave, families and communities needed all the help they could get to pull through. Fortunately, this was a year when brands truly stepped up to make a difference in the people's lives.

In India, the past two years have presented people with unprecedented stresses and challenges. But this difficult period has *also* - thanks to quarantines, slowdowns, and lockdowns - pushed people to reflect more deeply than ever on what truly matters in life. On both the micro and micro levels, then, Purpose is more relevant than ever.

And Purpose will *continue* to be relevant. Kantar India's ongoing consumer studies have shown that in a post-pandemic world, consumers expect to continue to look to brands to provide practical solutions in their everyday life: from promoting nutrition and hygiene, to saving time and managing stress.

What's more, 'consumers are *also* now highly aware how 'big-picture issues' - from pandemics to climate change - can swiftly hit home, to bankrupt ordinary households in the blink of an eye. Purpose is no longer a luxury good:

we've all seen how the world's most vulnerable people are the ones most affected by its biggest systemic threats. We've also seen, thanks to the pandemic, how collective action is the only surefire way to effectively address these threats. This is why Indian consumers say that in the years to come, they expect businesses to remain involved in dealing with the India's greatest national challenges.

In the world of Indian commerce, the past two years have been a time of unprecedented volatility and unpredictability. Degrowth pressures, supply-chain crunches, and an unexpectedly severe Second Wave COVID-19 resurgence - all of these disruptions coincided, somehow, with a booming stock market and continued technological innovation.

By next year, as India completes its historic vaccination drive, much of this "noise" in brands' year-on-year financial data should subside - and BrandZ™ will reinstate its full overall brand valuation model. This year, however, the suspension of 'business of usual' has afforded us the chance to look at more long-term building blocks of brand value - and identify those Indian brands that are truly **'Leading with Purpose.'**



The methodology

To arrive at this year’s Most Purposeful Brands of India, we analysed the Kantar BrandZ™ database from 2020-21 covering 418 Brand cases for this project. In each case we had brand perception and brand equity metrics for brands across 30 categories – sourced from a total of over 12,000 respondents. The database includes 28 consistent attributes. A two-stage analysis process was then used to arrive at the decision to centre Purpose in this year’s report:

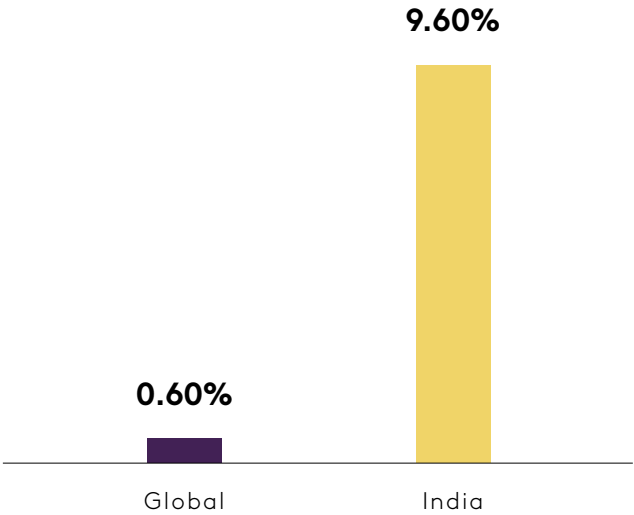
- Factor analysis, which grouped 28 perceptual attributes into 18 factors or ‘brand image pillars’ – one of which is Purpose
- Brand structures analysis (BSA), which quantified how the interaction of brand perceptions created success for brands in the past - and identified the perceptions that will create success in the future to guide brand positioning decisions and actions

The Brand Structures Analysis produced a model with a highly involved set of significant relationships between various brand image pillars, all connecting to BrandZ™’s three core, proven drivers of brand value: Meaningful, Different and Salient. **From this analysis, Brand Purpose emerged as the key differentiator for brand value in India.**

From there, the selection of brands in the Most Purposeful Brands of India awards was based on brands’ most recent scores on Brand Purpose.

Brand Purpose

As a driver to equity



PURPOSE AMID CHANGING CONSUMER VALUES

2021 proved to be an especially interesting year to examine Purpose in the Indian brand landscape – because we know from other Kantar consumer sentiment data that:

01 Basics became more important during the pandemic

- Consumers sought reassurance through brand communications
- Product and service providers reimagined convenience

02 Traditional ‘disruptive’ innovation declined in importance

- Consumers were less inclined to try something new or unknown
- Economic constraints led people to the tried and true, and led them to re-evaluate their conceptions of value

03 In this uncertain environment, absolute superiority (i.e. the ‘best in class’) was sought less than functional reliability

KANTAR BRANDZ INDIA'S MOST PURPOSEFUL BRANDS

FMCG

RANKING

TATA TEA #1
SURF EXCEL #2
TAJ MAHAL #3
MAGGI #4
PARACHUTE #4
BRITANNIA #5

Non-FMCG

ASIAN PAINTS #1
JIO #2
SAMSUNG #2
MRF #3
TATA HOUSING #4
AIRTEL #5

Technology

AMAZON #1
ZOMATO #2
YOUTUBE #3
GOOGLE #4
SWIGGY #4
FLIPKART #5

*Brand Purpose is calculated basis the index score of consumer perceptions about companies/ brands trying to make people's lives better.

KEY TRENDS

The 2021 BrandZ™ India data, in conjunction other Kantar consumer sentiment tracking, has revealed a number of patterns in what Indian consumers deemed ‘Purposeful’ in 2021.

1

MICRO AND THE MACRO

Purpose can be built on small, helpful daily interactions with consumers – and it can *also* be built on a brand’s large-scale commitments to systemic change. The best brands do both. In this year’s Purpose data, consumer perceptions of ‘Good Range’ and ‘Responsibility’ were both highly correlated to strong Brand Purpose scores.

2

TECH BRANDS ENABLE EVERYDAY CONVENIENCE

Technology brands have been able to scale up and showcase a wide range of products plus enter new categories at a time when consumers were desperate for at-home & delivery solutions. Everyday convenience and in turn making lives better fuels saliency for brands.

3

THE FMCG PICTURE

FMCG brands that score high on Brand Purpose have shown that purpose and profit can go hand in hand. They have worked to reduce their environmental impacts and promote social causes - which in turn attracts customers, partners, and talent. This year, FMCG brands in the Food and Personal Care segments scored highest on purpose.

4

GO ABOVE AND BEYOND

Non-FMCG brands have focused on adopting marketing strategies that promote the brand in ways that look beyond the function of product or service; the key is to does more than just meet consumers’ immediate needs, adding new and potentially differentiating associations.

5

SUSTAINABILITY MATTERS

Indian consumers, on par with many of their Asian counterparts, are actively engaging with sustainability. In all, 77% are prepared to invest time and money in companies that try to do good.

2021 - THE INDIA
STORY

- 26 - COVID UPDATE
 - 28 - SUSTAINABILITY AND BRAND PURPOSE
 - 32 - BHARAT
 - 36 - HEALTH AND WELLNESS
 - 38 - CONSUMER AND ECONOMY
-

A NATION TESTED, A NATION CONNECTED

UNDERSTANDING INDIA'S POST-COVID CONSUMERS

In October 2021, India reached 1 billion vaccine doses in its fight against COVID-19. Combined with news of successful anti-viral therapy trials, India's vaccine milestone offered real hope that India and the world could soon write a new chapter in its fight against the deadly pandemic.

At this point, any 'victory' over COVID will necessarily be a bittersweet one. Millions have died worldwide. In India, three-quarters of households say they were impacted economically by the pandemic - and for those who have had to say goodbye to loved ones, the loss has been incalculable.

At the same time, the pandemic has helped people discover new connections and interdependencies. In Kantar's COVID-19 Barometer 2021 survey, 70% of Indians say that the impact of the coronavirus has helped their community to come together. The hope is that this kind of fellow-feeling and mutual aid will persist.

What's clear is that the world has changed, and so has India's society and economy. Yes, some safety precautions and sales trends will reverse in the years to come - but that doesn't mean that people's lives will simply revert to how they were in 2019.

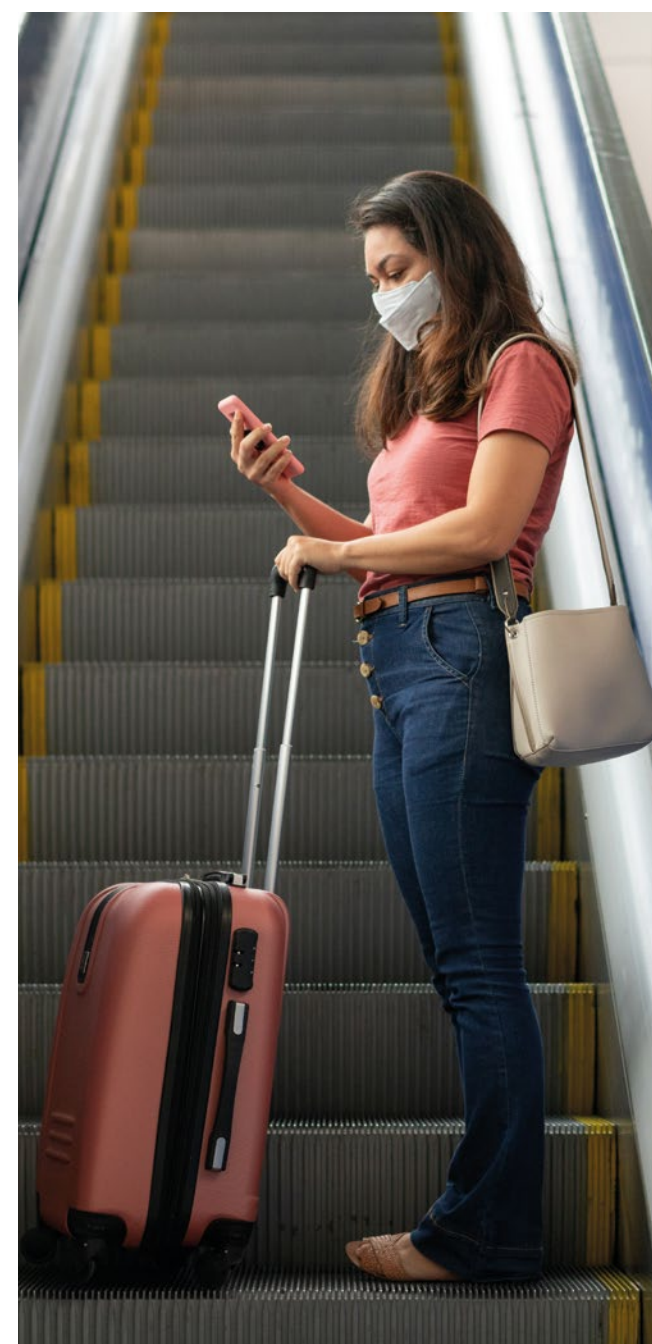
Lasting effects

Consider, for instance, the changing role of home. During the height of the pandemic, people's homes became their whole worlds: workplace, school, kitchen, entertainment venue, religious site, playground, gym, and more. Many of these adaptations are likely to persist throughout the decade: partly because we might all need to shelter in place again in the future - but also because many people found that they genuinely enjoyed the new at-home cooking, fitness, and recreation pursuits they picked up during lockdown.

True, many company offices are now beginning to reopen. But the rapid digitalisation of work occasioned by the lockdown is not something that can, or should, be reversed. Some more flexible form of 'work from home' will likely continue. On the individual household level, elements of the 'home office' will become as much of a standard design feature as the bathroom or the sleeping quarters: available for ready use when a family member gets sick, or when work demands odd hours, or traffic and weather make getting to the office difficult.

Indeed, many of the pandemic's most lasting cultural and commercial effects are tied to the rapid digital shifts that occurred during lockdown.

It used to be possible to claim that the "Internet isn't real life" - but after the past two years, that's no longer the case. Over the course of 2020, the number of Indians watching more than 6 hours of online videos grew some 333%, according to Kantar ICUBE research. Average duration of internet usage now stands at 107 minutes, up 21% from the year before; meanwhile, usage of smart devices like Smart TV's and streaming appliances has increased by 125%.



By the end of 2020, India had 579 million online video viewers, and 345 million online music listeners. For many Indians, too, online gaming has become a routine daily habit. On average, India's 232 million gamers play games on their smartphones five days a week; what's more, 60% of gamers surveyed by Kantar say that they expect play games *more* often as India enters the post-COVID era.

Smartphones, of course, have continued to grow in popularity and penetration. As of March 2021, they were used by 75% of all cellphone users, up from 70% the year before. Driven by the smartphone boom, Kantar ICUBE now estimates that India will exceed 900 million internet users by 2025. That figure will include some 60% of school-age children, up from 39% in 2020. Today, more than 65 million Indians are using the Internet for online education, and they hail from all kinds of economic and regional backgrounds; in 2020, for instance, the state of Uttar Pradesh had the highest number of online education users.

The number of online shopping users grew by 35% in 2020, and online shopping occasions were up markedly as well. Today, online grocery shopping is no longer a top-tier urban phenomenon - but is widely available to, and used, by a wide swath of urban consumers. Building on last decade's successful debut of a countrywide Unified Payments Interface (UPI), in 2020 India's digital payment user base surged by 29%. According to Kantar ICUBE estimates, by the end of 2020 there were 287 million digital payment users in India - a reach that was almost four times greater than that of debit and credit cards.

In sum, the lasting effect of the COVID-19 pandemic on India's communities will be to leave them more connected than ever before: More connected than ever in terms of people's bonds of care for each other - and, also, more connected in terms of people's reliance on the digital tools and services that are increasingly powering modern life.

TOWARDS A UNIQUELY INDIAN SUSTAINABILITY STRATEGY

Insights and cautions from Kantar India's inaugural Sustainability Foundational Study.

As Indian brands seek to lead with purpose, they have naturally turned to sustainability as a cornerstone of their efforts to stand for something larger.

In this, they are following the lead of the Indian national government, which recently pledged to achieve net-zero carbon emissions by 2070. Ordinary citizens, too, are becoming increasingly concerned with sustainability: In a recent Kantar survey, more than three-quarters of Indians said that they pay close attention to environmental issues in the news.

But just as India will have to forge a path to 'carbon zero' that looks quite different from China's or America's - so, too, will brands have to develop their own unique commitments to building a more sustainable India. Kantar's recent study of consumer attitudes toward sustainability has shown that there is no 'one size fits all' approach to how brands should seek to 'own' sustainability: instead, consumer expectations on sustainability vary greatly by country and region.

The greatest pitfall of purpose-driven marketing is a kind of bland homogeneity. Think of how in 2020, all advertising began to echo the same generic themes of 'togetherness.' Or, how, in the sustainability realm, so much messaging focuses on reducing carbon emissions and plastic waste, when in reality there is a whole constellation of sustainability measures that a brand can choose to take on.

Kantar's inaugural Sustainability Foundational Study, launched in August 2021, aims to inject a more locally-informed sensibility into the realm of corporate sustainability. As part of this global study, Kantar surveyed consumers across nine Asian markets about their attitudes toward the world's most environmental challenges, as set out in the UN's Sustainable Development Goal framework. Immediately, it became clear that Asian consumers' views on sustainability were quite different from their European counterparts.

For instance, in the United Kingdom, the issue of ocean plastics pollution is the number one sustainability concern for consumers. In Asia, by contrast, this topic ranks toward the back of the pack in terms of perceived relevance and urgency, behind a wealth of issues perceived as more important: these include water pollution, extreme weather, air pollution, carbon emissions, global warming, deforestation, and food insecurity.

What this means, for Asian brands, is that importing a Western 'sustainability playbook' will do little to fulfil the goals of purpose-driven brand building - will do little, in other words, to show consumers that your brand truly understands how environmental issues are impacting people's lives.



The local-level picture

Just as importantly, this year's Foundational Study on sustainability found significant differences *within* Asian markets with regards to the environmental issues that consumers found most pressing and relevant. In South Korea, for instance, the three most important sustainability issues among consumers were carbon emissions, extreme weather, and air pollution. In India, meanwhile, the top three biggest issues were: **water pollution, hunger/food security, and deforestation.**

In a still-growing country like India, people are experiencing first-hand the impacts of environmental change and social inequality. These issues are real and raw: for some, it's about the survival of themselves and their loved ones. It's important, then, for Indian brands to talk about how specific environmental issues play out on a local level. Unfortunately, this happens far too rarely.

The upside, though, is that there remain significant opportunities for Indian brands to take real, locally informed leadership positions on sustainability.

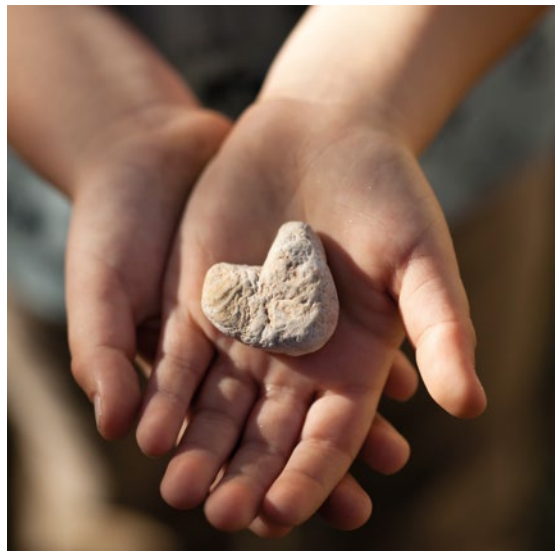
To see how much richer and more rewarding sustainability becomes when viewed through a local lens, consider the example of Electric Vehicle marketing. In India, putting more EVs on the road not only means reducing greenhouse gas emissions: It also means reducing the fiscal burden that fuel imports and subsidies place on the Indian government - which, in turn, means freeing up more government money to spend on other economic and social programs.

For Indian car brands, then, there's a unique opportunity to imbue their sustainability messages with tangible themes of patriotic pride - rather than hitting the same worldwide marketing notes about "building a greener world."

More generally, there's a wealth of cultural DNA around Indian creativity that has largely gone untapped in sustainability marketing. Think of India's traditions around adaptive reuse, waste recycling, and *jugaad* ingenuity. All of these attributes resonate with today's environmental concerns - and just as importantly, offer an optimistic and proactive way to *address* these concerns.

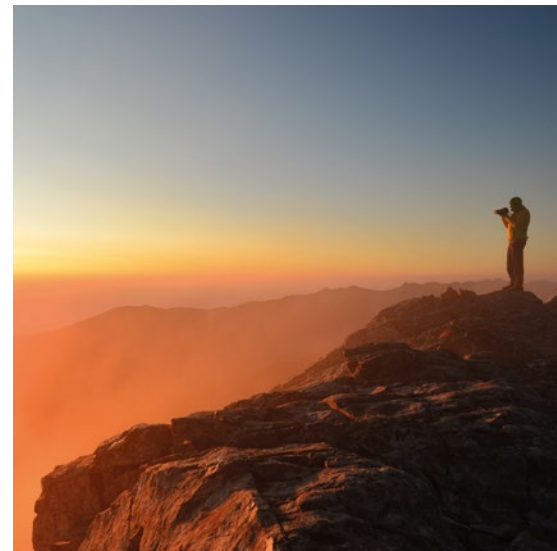
INCORPORATE SUSTAINABILITY INTO YOUR BRAND PURPOSE

KEY PRINCIPLES



Be authentic

- Craft a credible purpose that is connected to your brand's history and reputation.
 - It's not about just going 'Viral'.
-



Be brave

- Confidently stand by the purpose you believe in.
 - Do not buckle down when things get tough.
-



Be relevant

- Find relevant tensions and expressions nuanced to local market context, and evolve as the market does.
 - Do not go in blindly with a blanket strategy.
 - Don't lose sight of your consumers' sentiments.
-



Be responsible

- Walk the walk! Embed Purpose in everything the brand does.
 - Do not just stop at saying what you want to do.
-

BHARAT

THE MANY FACES OF RURAL INDIA

If there's one word that sums up the Indian rural consumer in 2021, it would have to be: *resilient*. The Second Wave of COVID-19 saw India's villages affected as never before - and unlike in larger cities, many rural citizens did not have the option of working from home during the worst days of the pandemic.

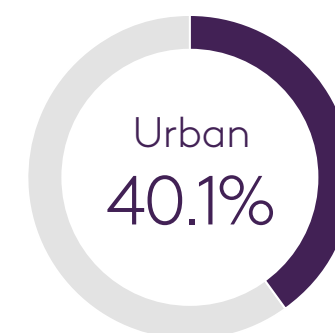
Nevertheless, according to Kantar Worldpanel data, sales volumes for Fast Moving Consumer Goods (FMCG) held up much stronger in rural areas than in urban areas during Second Wave outbreaks. This echoes the dynamics seen in 2020, when rural areas remained a more reliable engine of FMCG sales as big cities endured waves of lockdowns. Within the FMCG realm, for instance, grooming and personal care products showed stronger traction in rural areas during these past two years, as a result of there being less of a home-office trend.

Not surprisingly, one of the other big stories in rural India in 2021 was the continued uptake of personal and home hygiene products - with household penetration of product categories like utensil cleaners, toilet cleaners, hand soap and hand sanitisers all showing marked upticks in Worldpanel tracking data. Just a few years ago, brands in these hygiene categories were running educational campaigns in rural areas aimed at teaching consumers the simplest basics of cleaning and personal care. Today, while penetration still has some ways to go, there exists a large and increasingly sophisticated core rural market base for these products.

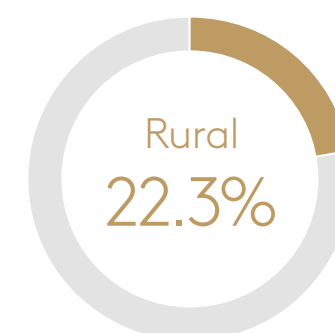
Indeed, across a variety of categories, the sheer size of the rural market should not be overlooked or discounted, despite lower average penetration rates: As rural consumers continue to expand their purchasing behaviours, brands of all stripes could soon find that their primary audience is rural, not urban. According to Worldpanel Data, this kind of 'rural shift' is already the underway in the hand sanitiser market. Despite smaller penetration, as of May 2021 hand sanitiser was actually a larger market in rural regions than in urban areas, in terms of absolute number of households purchasing this category.

Hand Sanitizer Penetration

Aug 2020 - May 2021



4.26 Cr
Homes



4.44 Cr
Homes

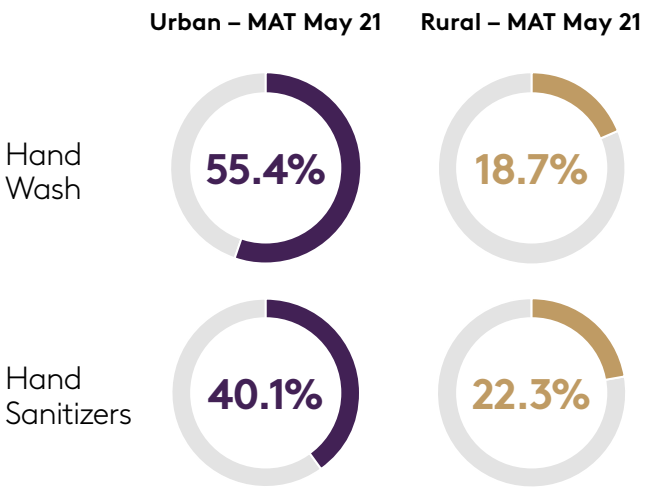
A similar dynamic is also at play in the OTT streaming industry, especially on the Advertising-Based Video on Demand (AVOD) side of the business. Though urban AVOD penetration was more than double that of rural in Kantar's 2020 ICUBE data (62% v. 29%, respectively), rural India's 275 million AVOD user base was only 25 million off the urban Indian viewership.

For brands, this rapid growth of AVOD viewing will, of course, mean a whole new marketing channel for reaching rural consumers. Though this is perhaps the *least* profound consequence of rural India's OTT revolution. Over the next decade, the rise of streaming (alongside smartphones and eWallet technology) means that rural Indians will finally get to experience to the same kinds of entertainment, gaming, education content, and commercial services as their urban counterparts. This will create unprecedented opportunities for a kind of 'urban-rural cultural convergence.'

This is not to say that rural consumers will altogether lose their distinctive needs and characteristics in the coming years. Within the OTT world, for instance, rural consumers seem to display a much stronger preference for news content than their urban counterparts, and comparatively less interest in short video entertainment formats.

Similarly, in the hygiene segment, hand sanitisers have overtaken hand wash liquids in terms of overall rural market penetration (whereas in urban areas, liquid soap remains king). What's more, in rural areas consumers have shown a much stronger preference for smaller packs of hand sanitiser. This reflects rural consumers' fine-tuned search for value - and also a greater need for on-the-go formats, compared to more homebound urban Indians.

Source: Worldpanel Division, Kantar



Source: Worldpanel Division, Kantar

All of this being said, the sheer size of rural India also suggests a need for greater understanding of the ways that rural consumers differ from *each other* - and not just in terms of varying regional taste preferences.

In the same way that we talk about consumers in tier-two and tier-three urban areas as being distinct from residents of Mumbai and Delhi, so too should we pay attention to nuances among rural villages - and especially, to the ways that village consumers differ based on their proximities to larger towns.

Call this the Near Village - Far Village effect: when Kantar researchers looked deeper into rural FMCG sales from May 2020 - May 2021, they saw a striking divide between rural consumers who lived in villages *within* 10 kilometres of towns (**Near Villages**), and those living in villages at least 10 kilometres away from towns (**Far Villages**).

For starters, sales growth over the past year was much stronger in Near Villages than in Far Villages. What’s more, the purchasing patterns of Near Village consumers mirrored the purchasing patterns of Urban consumers - while Far Village consumers’ shopping behaviour showed no correlation with Urban purchasing data.

So while rural consumers may be united by their resilience, they should also be appreciated for the diversity of their needs and tastes.



FROM 'RED ALERT' TO 'RISK MANAGEMENT'

MASTERING SHIFTS IN THE HEALTH MARKET

Concern for health and wellness can no longer be described as a mere trend: For obvious reasons, it's now a guiding force behind consumer behaviour.

At the same time, even if every brand in every category now considers itself something of a 'health brand' - certain brands are destined to become *more successful 'health brands' than others*. And, furthermore, just because consumers are newly health-conscious, does not mean that they will remain as intensely *health-obsessed* as they were at the height of the pandemic.

According to Kantar Worldpanel, for instance, sales volumes for the hand sanitiser market peaked in August-September 2020 - though sales, of course, remain higher today than their pre-pandemic levels. More recently, this year's crowded Diwali markets served testament to a renewed desire among Indians to get out and experience life - even if that means accepting certain levels of health risk.

Indeed, as 2021 ends, the prevailing health and wellness paradigm has moved from *'red alert'* to *'risk management'*. This shift has major implications for the future of the Indian health and wellness market. Going forward, themes of immunity and protection will predominate, as consumers seek to balance a need for *reassurance* with their desire for *release* in the post-pandemic world.

There's no doubt that today's Indian consumer has become a healthier one. According to Kantar Worldpanel data from 2020, not only are sales of hygiene categories like hand sanitisers, liquid soap, floor cleaners, and vegetable washes up markedly over pre-COVID levels; In addition, 55% of consumers say they are "very likely" to continue using these hygiene products at an elevated rate going forward.

Just as importantly, consumers' focus on health has extended beyond the sanitary realm, to embrace a more holistic view of wellness. By the end of 2020, the proportion of Kantar survey consumers who said they were exercising daily increased by 70% from the year before. Millions of Indians tried diet and fitness apps for the first time; According to Kantar's 2020 ICUBE survey, one out of every four Indians used an online healthcare facility last year.

Sales of both multivitamins and Ayurvedic products are up - and health has truly become an all-ages concern. According to a May 2021 report in *Mint*, some 84% of Millennials and 75% of Gen Z say they constantly worry about their personal health; 49% of these consumers now rely on Ayurvedic products, and 60% on Immunity Boosters.

The rise of 'Immunity'

Given this healthy shift - What, then, should we make of the concurrent rise in demand for (not-so-healthy) 'stress-busters' like indulgent foods and alcohol? According to Kantar Worldpanel, alcohol sales have grown 67% since the beginning of the pandemic - and 80% among men aged 35-44. 54% of Indians now say they like to eat food that may not be good for health, and 57% say they like to treat themselves to indulgent foods.

As vaccination rates increase, people are once again mixing and mingling out in public - but they are newly aware, as they weren't before, that new health threats may be lurking around the corner. That's not going to keep people from living their lives - but it *will* make them more willing to pay for an extra bit of reassurance.



Products that promise immunity and protection have become a popular way for people to square these tensions: to help them to manage the physical and psychological risks of "opening up." According to a Kantar Health and Hygiene panel conducted in May 2021, 74% of urban Indians consider it important to build the immunity of themselves and their family; 46% bought immunity boosting products in the previous year, and 89% believe their immunity has improved after using immunity-boosting products in the previous year.

Kantar Worldpanel now projects the Immunity segment of the Wellness industry to grow 18% by the end of 2021. This segment encompasses products fortified with substances like Vitamin C and Zinc, as well as more traditional ingredients like honey, *tulsi*, and turmeric, plus categories like Chawanprash.

What's more, brands outside the food, beverage, and hygiene space are also finding ways to incorporate an immunity component. Shampoos now promise to give hair immunity from future damage. Meanwhile, bath soaps that have long been fortified with ginger and turmeric now come with new labels that tout these ingredients' immunity benefits.

Tulsi and *neem* are being woven into clothing fibres, and drivers can now equip their cars with advanced air purifying systems.

Not all of these products will become runaway hits. But as a result of the pandemic, Indians are undoubtedly moving toward a more holistic view of value, rather than going for the absolute lowest price. And as life increasingly returns to 'normal,' health risk management will become an integral part of this new consumer calculus.

After all, when Indian consumers buy products fortified with *tulsi*, or turmeric, or Vitamin C, they aren't merely paying for the health benefits these 'immune-boosting' ingredients provide. They're also paying for the added psychological reassurance provided by these formulations - as Indians once again began to venture out into our beautiful, risky, rewarding world.

CHANGE IS HERE TO STAY

UNDERSTANDING INDIA'S NEW CONSUMER VALUE MATH

India's economy is on track to grow by as much as 8.8% in 2021, after growth spiked to 20.1% from April to June of this year. Amid an ongoing vaccination drive, and increasing out-of-home shopping occasions, these growth figures represent welcome news after an unexpectedly severe Second Wave earlier this year. But significant macroeconomic challenges remain.

The issue of unemployment is as pressing it was back in the pre-pandemic days of 2019, with millions losing out on steady jobs due to the effects of COVID-19. India is still a young country, and must make the most of its demographic window before its workforce begins to age. Though the national government remains focused on maintaining fiscal discipline, the pandemic occasioned new forms of social support and health care spending; Given the economic strains on India's lower and middle classes have faced, some version of these programs may have to extend even into post-pandemic "peacetime."

Encouragingly, in the private sector, India's booming stock market and world-class startup culture has created dozens of new unicorns. Leading businesses like Zomato, Nykaa, and PayTM all strengthened their ledgers - and burnished their brand reputations - with successful IPOs. Telehealth and online education brands emerged from the pandemic as especially exciting growth categories.

Retail brands like Amazon, Reliance, and Flipkart spent the pandemic building out a true 'omnichannel' framework for the future of Indian commerce. In this retail world to come, newly digitised and hyperlocal *kirana* stores should be able to coexist alongside new 'big-box' formats, as well as next-gen online storefronts.

Elsewhere, the ongoing government drive to sell stakes in state-owned assets could further boost the private sector (and government coffers). Already, the reacquisition of Air India by the Tata Group has the air of an era-defining business event.

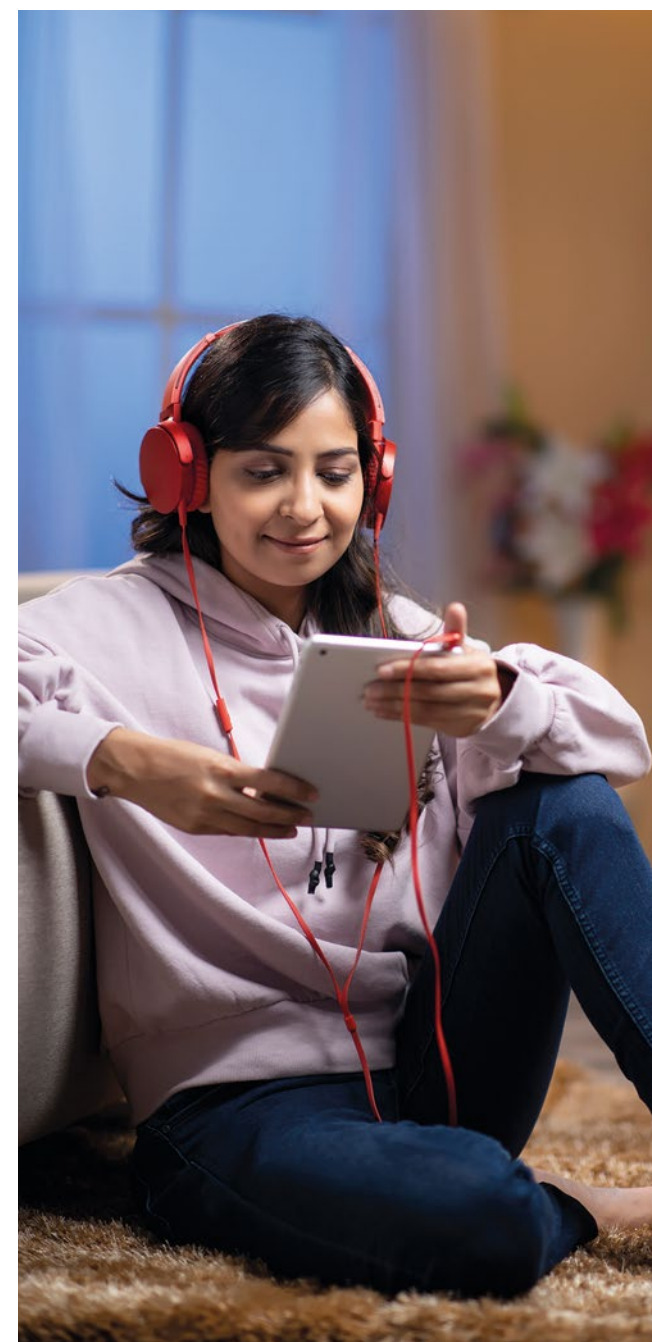
The value revolution

Just as importantly, the pandemic has also created profound shifts in India's *microeconomic* environment: in the spending and saving behaviour of India's 250 million households.

In many urban households, gender divides are gradually being bridged as work from home has caused men to take greater "ownership" of the domestic environment and home spending. Household time-use and leisure patterns, meanwhile, have changed drastically as OTT streaming viewing has soared.

In the realm of personal finance, eWallets and online banking have gone mainstream, while stock market swings became something of a pop culture phenomenon during the pandemic. The popularity of Zerodha and other *Demat* account providers has skyrocketed; this raises the tantalising possibility that India - long a country of savers - could soon evolve into a nation of investors.

For brands, the most important microeconomic development has been a quiet revolution in how consumers calculate value. For years, the truism in Indian retail was that local shoppers were peerless discount hawks - that for Indians, 'value' meant finding the absolute lowest price (and getting a thrill from the bargain hunt, besides).



Today, the rise of ecommerce and the pressures of the pandemic have effectively scrambled this "race to the bottom" value framework - perhaps permanently. Consumers are increasingly willing to add "convenience" into their retail calculus - not least because more "convenient options" (e.g., buying a product online for home delivery, versus going out and picking it out at a store) often feel safer. Pre-COVID, 40% of Indian consumers surveyed by Kantar said they were "prepared to pay more for products that make my life easier." Today, that number has risen to 61%.

During lockdown, when people were starved for out-of-home experiences, 'premium' products gained a new cachet that may prove lasting. Mealtimes, chores, showering: at the height of 'stay at home,' these occasions moved from the margins of the day to become 'star players.' As a result, people are now willing to pay slightly more to bump themselves up to a more enhanced product level - whether that means an elevated sensorial experience, or easier-to-use functionalities.

The effects of this 'premiumisation' wave are everywhere. In segments like tea and spices, where 'loose' options still proliferate, branded products have made strong gains at the expense of unbranded competitors. Meanwhile, 'premium' offerings saw significant sales growth in segments ranging from toothpaste and bar soaps, to floor cleaners and hand sanitisers. For sanitising products, especially, it has helped that 'premium' offerings are often perceived to offer greater health protection.

Convenience, Premiumisation, and Health: alongside that old stalwart, Cost, these are all now central components of the new consumer value math. For top brands, this is a good thing. Those with strong Meaningful Difference will find consumers more willing than ever... to pay for the elevated experiences that a valued brand can provide.

THOUGHT
LEADERSHIP

- 42 - SOUMYA MOHANTY
OVERCOMING PURPOSE
ANXIETY
 - 46 - PREETI REDDY
INCLUSIVE ADVERTISING
 - 50 - K RAMAKRISHNAN
PROVENANCE
-



Soumya Mohanty
Managing Director,
Clients and
Quantitative, Insights
Division, Kantar

soumya.mohanty@kantar.com

OVERCOMING PURPOSE ANXIETY: THE NEW RULES OF MEANINGFUL BRAND-BUILDING

In every disruption lies an opportunity – but also the need to navigate increased layers of complexity. So it is with the rise of purpose-based marketing.

Consumers have responded to COVID-19 by altering many behaviours: where they work from and how they spend leisure, what they buy and what they look for in brands. Experimentation has dropped as consumers choose to stay safe with big brands - but there has also been an outpouring of support for local business and 'buying Indian.' Sustainability has become a part of brand discourse, though no one is clear whether consumers will pay for sustainably-sourced products.

Of course, the challenges and opportunities of purpose-based marketing pre-date COVID-19. At Kantar, we have long examined purpose as a brand's North Star, which guides how you serve your customers better and how you impact the community around you. For years – to give one example – Apple's purpose has been to enable creativity and exploration. And for years, Apple's marketing has communicated this purpose in exciting and colourful ways.



But COVID-19 *has* made us all reassess what’s truly important in life – and for brands, that has led to a new kind of purpose anxiety. Consumers are increasingly wondering if ‘big business’ has grown too big, and are questioning its role in an increasingly polarised and unequal society. Brand managers, meanwhile, find themselves wondering: In this new consumer climate, are they truly doing enough? Should a brand’s self-proclaimed purpose extend far beyond the functionality of its products, and instead try to tackle the biggest problems of our time?

Not necessarily. Purpose-led marketing and creativity should not be misunderstood as a need to take stances on every large social issue of the day. When a soft drink brand which has built its image around youth and fun suddenly pivots to protesting racial discrimination, that might not always ring true.

Marketing Professor Byron Sharp has criticised this behaviour as a kind of jumping on the purpose bandwagon: “‘Buy this brand, because it will help children in Africa.’ – Well, if all brands do that, it’s very boring and not creative. It’s not branding.”

No, it is not. Though, to be fair, *true* brand purpose – as seen in the kind of best practices that Kantar has been researching for the past decade – was never about making day-one commitments to solve world hunger or save the Amazon. (Though in rare cases, perhaps that could be an outcome down the line.) True purpose-led growth is intrinsically linked to a brand’s core identity – rather than being a disconnected noble cause that has little impact on a brand’s perception.

Purpose *can* work as a strategy for brands, when it’s based on the right consumer insights, and executed effectively. The BrandZ™ evidence shows, in fact, that brands that score highly among consumers on this kind of *authentic* brand purpose, are likely to grow twice as fast as ordinary brands. In India, BrandZ™ data suggests, a brand’s **Purpose** ranking has a direct impact on its **Meaningfulness** score – which, in turn, is one of the proven building blocks of brand value growth.

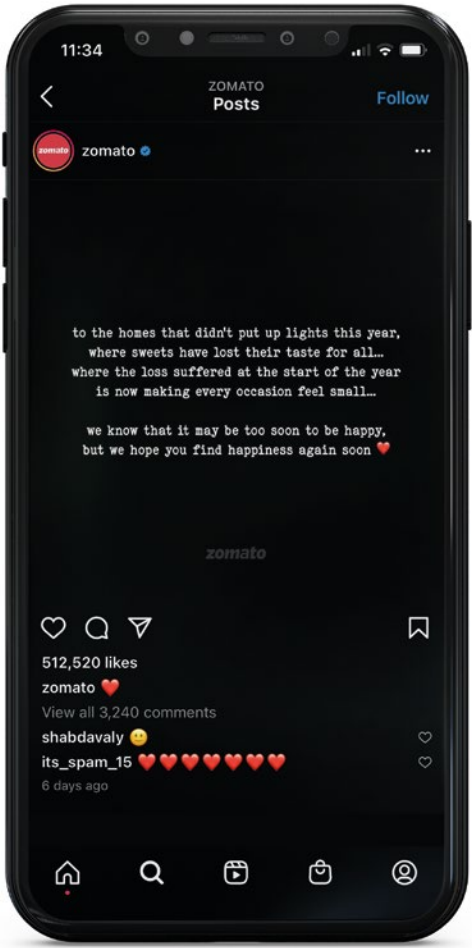
Note that in the BrandZ™, Purpose scores reflect not only a brand’s ‘purposeful’ actions, but also how well it *communicates* these actions to influence consumer perceptions. For brands, purpose needs to be well-articulated and well-amplified – which is where marketing comes in. If we communicate purpose in the right way, we can build deeper human connections with consumers and drive equity – all while doing our part to make the world a better place in those realms where we’re best-equipped to help.

How do we do this? You don’t have to be Patagonia, or start a global movement, to communicate purpose effectively. Just be authentic: focus on solving real consumer tensions, and on providing real consumer delight, just as you would with any good marketing campaign.

Here are some examples of brands that have been ‘doing purpose right’:

- During the pandemic, Frito-Lays highlighted the efforts of its extensive local supply chain, expressing gratitude to all those responsible for bringing joy to consumers during tough times. Crucially, this #Heartwork campaign built on codes of joy, trust, and fun that were already the bedrock of the brand’s marketing presence in India.
- Zomato’s social media engagement stands out for how that it not only responds to consumers, but also the headlines. Zomato is leading the conversation online in an unusual way for a brand – but always with wit, hope, empathy. This has included acknowledging that food doesn’t differentiate based on religion or creed – and, more recently during the Diwali season, acknowledging the households that *aren’t* putting their lights up, after the losses of early 2021.
- Cadbury’s ‘Not Just a Cadbury’ hyper-personalised campaign has used generative AI technology to make Shahrukh Khan a brand ambassador for many small businesses across India.
- Lego’s #LetsBuildTogether campaign is a fantastic example of purpose-led communications, with a campaign full of at-home play ideas aimed at supporting families rather than selling particular products.

It’s important to remember that being purposeful doesn’t have to mean being overly serious – it can also be fun and casual. Sensodyne recently revised an old ‘Faces’ campaign idea, showing the reactions of people with sensitive teeth to eating really hot or cold foods. But they updated this concept to include more LGBT+ faces. It’s a simple ad, with a call to enjoy every colourful moment and not let teeth sensitivity hold you back. Is this a purpose-led ad, or is it simply good old-fashioned marketing that’s been updated to reflect the broader modern audience? Perhaps a bit of both – which is the point.



Purpose-led creativity is about more than producing ads where you simply recite the causes you support. It’s about genuinely making consumers’ lives better, and at the same time figuring out how to tie these solutions to your core brand offerings. During lockdown, for instance, Gillette launched ‘Barber Suraksha,’ which provided financial assistance to help barbers get back on their feet. Similarly, many alcohol companies have found ways to tie sales of their products to support for out-of-work bartenders. These campaigns are based on authentic, mutually symbiotic prior relationships – but also show that the brands are thinking about issues beyond their own sales.

Last year, Kantar Consulting’s Marketing 2020 report was published in the Harvard Business Review based on interviews with 600 CMOs and 15,000 consumers worldwide. It identified “purposeful positioning” as a key driver of marketing success, behind only “big insights” and “total experience.”

But, of course, we also can think of purpose *itself* as a kind of ‘total experience.’ For purpose can only be successfully leveraged when it is made clear and intrinsic across everything that a brand does – from its relationships with employees, to the design of its products, to its interactions with consumers.





Preeti Reddy
Chairwoman
South Asia, Insights
Division, Kantar
preeti.reddy@kantar.com

INCLUSIVE ADVERTISING: BRAND DIFFERENTIATOR OR UNNECESSARILY WOKE?

Why exclude, when you can include?

It seems simple, on its face: We know that advertising is an ongoing conversation between a brand, a marketer, and a consumer – and that especially in the age of digital feedback loops, inclusive advertising has the power to shift attitudes away from prejudice and toward greater tolerance and understanding.

We know, too, that India remains a remarkably diverse society, and a remarkably vocal one. This, also, seems like a straightforward argument for inclusivity: there are many unheralded voices clamouring to be heard, and advertising has the power to amplify them.

Put that way, inclusivity like a no-brainer, right? But then you look again, and it turns out that the same factors that make inclusivity so attractive in *theory*, also make it difficult in *practice*.

Every brand jumping on the inclusivity bandwagon naturally wants to be lauded for their ground-breaking new campaign. But with the rise of social media, it turns out, ordinary people can just as easily call out brands for getting inclusivity *wrong*... as they can praise brands for getting inclusivity *right*.

Ignoring traditionally 'unincluded' groups in prior generations of ads may have been bad. But 'talking over' or distorting the authentic stories of these groups in the name of supposedly 'inclusive' advertising is arguably even worse.



Well-intentioned ads that inadvertently feature tokenism or harmful stereotypes in the name of ‘representation’ can be highly damaging for brands. These days, everyone’s a media critic, and savvy consumers may see botched appeals toward tolerance as nothing more than cynical pandering.

At the same time, still others see the very premise of ‘inclusivity’ as synonymous with the trend of ‘wokeness’ - which they define as efforts to inculcate empty cosmopolitan values that are out of step with India’s traditional masses. These audiences are equally quick to pounce on undercooked inclusivity efforts as, at best, out-of-touch, and at worst, insidious. In the past few years, we’ve seen several ‘inclusion stories’ backfire on brands, leaving them battered and backtracking after assaults in social media.

Inclusion in the age of purpose

So, is inclusion too strong a position for brands to adopt as a differentiator?

Not if it’s done carefully and well. We are living in cluttered times, with dropping consumer attention. Layering a brand message with a bigger cause is a powerful way of building emotional connections with consumers, and particularly to gain currency with Millennial and GenZ audiences.

Inclusive marketing starts with countering stereotypes to create a vision that consumers can resonate with and embrace. We have witnessed a shift to campaigns featuring stories of real people told with sensitivity, that have the power to move us far more than campaigns that only strive to create aspirations for material lifestyles.

But this inclusive strategy needs to be carefully crafted in today’s volatile socio-cultural milieu. True inclusivity takes time and effort – as evidenced by historical efforts to increase gender parity in Indian media.

A recent analysis of Indian advertisements on television and YouTube, for instance, showed that even apparent ‘progress’ on gender inclusivity comes with caveats. Today’s Indian media landscape *does* rank ahead of global benchmarks for female representation – at least when it comes to screen and speaking time. But the same study *also* found that even more ‘inclusive’ Indian ads still run the risk of further gender stereotypes: women are still more likely to be shown as married, and less likely to be shown in paid occupations; women are also more likely to be depicted as caretakers and parents than male characters.

(For more on this topic, see the report from UNICEF and the Geena Davis Institute on Gender in Media, titled “Gender Bias and Inclusion In Advertising In India” - which was based on the 1,000 most searched television and YouTube advertisements aired across India in 2019.)

Getting inclusion right

With time and experience comes wisdom – and today, we are beginning to identify best practices that distinguish the ‘right’ kinds of inclusion from more ‘risky’ efforts. Some inclusive brand communication strategies that have worked are:

Providing solutions for consumers

Identify the unique audiences within your customer base, and communicate how the brand solves their needs by representing them better in marketing campaigns. Allen Solly’s Own Your Shape campaign, for instance, encourages women to become more playful with their style by embracing their body types. Similarly, Nike’s decision to include plus-size mannequins, while controversial, helped the brand build relationships with larger women seeking athletic gear.

Uniting people with something common that binds them

When a diverse audience uses a brand’s service or product, marketing can be effectively used to highlight the role the brand plays in the lives of a varied set of real people - rather than a group of ‘cookie-cutter’ models that ordinary consumers cannot relate to. One prominent example is the conversations that Dove has led about real women in India. Their Self-Esteem Project involves experts in the fields of psychology, health, and body image to create a programme to help young people of all backgrounds overcome body image issues and be their best selves.

Highlighting real stories that inspire

Bringing to fore the unique stories of real people who represent diverse backgrounds can make a brand relevant to a far wider consumer base. Bhima Jewellers broke stereotypes around the transgender community by capturing the journey of a transwoman (played by transwoman Meera Singhania) with empathy and authenticity, in a spot that sensitively showed the role that jewellery played in one woman’s journey towards ‘coming out.’



Representing the minority in popular occasions

The best ‘inclusive’ advertising doesn’t lose sight of its need to highlight how a brand can bring ease or joy to life’s occasions. At the same time, however, these same ads can consciously include consumer segments that tend to be marginalised – in order to show that diversity, too, is an everyday part of life. An endearing and effective example was the Surf Holi creative, launched as a part of the famous Daag Achche Hai campaign. In this ad, a little girl smartly saves her friend from colours while he is off to the mosque for namaaz.

The path forward

It is important, as we explore these new realms of inclusivity, to keep India’s religious and ritualistic sensitivities in mind – so that brands do not alienate mass audiences, all while offering little more than token inclusion.

Truly inclusive communication can be powerful. But it has to be relevant and meaningful for the brand and the segment it caters to. Mere tokenism, or being unnecessarily provocative, is soon rejected by consumers as being inauthentic – especially if a brand caters to a mass market. The goal should not be to force a ‘fantasy world’ of perfect understanding; but rather to simply, and powerfully, reflect a fuller picture of India’s diverse and inspiring citizenry.



K Ramakrishnan
Managing Director,
South Asia, Worldpanel
Division, Kantar
k.ramakrishnan@kantar.com

PROVENANCE: DOES IT MATTER?

In 2015, we witnessed a unique, watershed event in the history of the Maggi brand in India. Between June and September that year, some 38,000 tonnes of Maggi Noodles were collected from retail stores and destroyed. As a result, in the final months of that year, a brand that had previously notched a monthly household penetration of 18%, was not even able to reach 1% of homes.

Fast forward to today, and Maggi now enjoys a 20% monthly household penetration. Half a decade since the 'event,' restaurants and diners can't seem to get enough of Maggi-based recipes.

This comeback is all the more remarkable considering that Maggi is, ostensibly, an international brand - battling a host of more 'local' Indian manufacturers like Sunfeast's Yippee Noodles, and tradition-touting Patanjali.

Or is Maggi's provenance not so cut-and-dried? Does the consumer of Maggi in India see it as an international brand, a local favourite, or something in between? Maggi's rebound is, in large part, a story of how Indian consumers are willing to claim and stand by brands that they've grown up with - so as long as the brand remains true to its promises.

This is not just a Maggi story. India's brand landscape is replete with stories of steadfast customer loyalty to treasured 'hometown favourites' - whether or not their provenance is "officially" Indian.



In the year ending June 2019, for instance, over 55% of all new smartphone brands purchased in India were Chinese. Then came events that, in theory, could have threatened that dominance: events like the repeated incursions by the Chinese army into the Indian territory, and the onset of the COVID-19 pandemic, which led to a rise in anti-china sentiments in many countries around the world.

In the subsequent two years, however, the share of Chinese brands among smartphones purchased in India has risen to over 70%. Even the big global giants like Samsung and Apple have not managed to steal market share away from these Chinese brands.

What these stories suggest is that national provenance is perhaps not the dominant lens used by Indian consumers when evaluating their choices across categories. There are many ways that brands can work to ‘feel’ Indian regardless of their initial points of origin.

To take another example: In a Kantar survey in 2020, we found that 74% of shoppers perceived Lifebuoy to be an Indian brand. Never mind that it was originally introduced in the UK, way back in 1895. Pond’s is an even older brand, first introduced to the US market in 1846; But 61% of shoppers surveyed believed Pond’s, too, is an Indian brand. In contrast, Vivel, which is a homegrown ITC brand, was considered as an Indian brand by only 41% of surveyed shoppers.

Provenance may still be used as of a compelling brand story, of course – but when taken alone, it is not enough to win. Instead, the evidence suggests that brands should rely on a more diverse set of differentiators when seeking to become a part of Indian consumers’ everyday lives.

Indeed, some of the best international brands have managed to become quite ‘Indian’ in their spirit – with time and effort, of course. In the 1990s, Kellogg’s had confidently entered India with the goal of changing Indian’s breakfast habits. At first, it did so by relying heavily on its staple of American brand names – a strategy that had worked in France, where the likes of Cornflakes and Special K had successfully defeated croissants and donuts. Yet in India, after years of lukewarm results, the brand decided to change its tack – an effort that culminated in late 2020, when Kellogg’s launched Upma, thus changing its own breakfast portfolio to better suit the Indian palette.

This local adaptation dynamic is perhaps best exemplified by fast-food brands. Once they decided to enter India, the likes of McDonalds and KFC had to adapt to a new way of working and communicating – speaking out, for instance, about using separate kitchens and utensils for the vegetarian and non-vegetarian parts of their menus. Pizza chains saw their masala offerings gain favour over their international-best-selling SKUs.

The hyperlocal angle

As many seasoned marketers in India would perhaps vouch for, India is a bundle of countries within itself. That means that when we talk about provenance in the Indian market, there’s actually a second level to the concept. India’s brand landscape, of course, is filled not only with major national players, but also with the most local of brands. There are plenty of profitable brands that are hugely successful within a sole, 200 km radius, and nothing beyond: Plenty of single-state wonders, so to speak.

The tea and spice categories are classic cases for this dynamic. Lhasa and Lamsa as tea brands are hugely successful, but not beyond Hyderabad. See also Gemini in parts of Telangana; AVT in Kerala, and so on; Even the famed Wagh Bakhri tea brand exhibits geographic limitations in its dominance.

How does a national organisation with country-wide or even global aspirations work to become a ‘local favourite’ in this context? One example from recent times is Tata Chakra Gold. Like other brands, they have launched bespoke blends for different states based on the palate preference. But crucially, Chakra Gold has gone one step further, and explicitly highlighted these different blends in its marketing through special state pride campaigns.

Similarly, Tata Tea had earlier launched Chakra Gold Care, which was specially made with ingredients available and used in Tamil Nadu, the better to woo the ‘TN’ consumer. This is a national Indian brand, working hard to identify with a specific regional palette.

When all is said and done, these case studies highlight how brands today need to go above and beyond a mere ‘provenance play’ to win local love. While, in some cases, the Indian consumer may buy into a brand’s Indianness through references to Ayurveda, or localised ingredients, or mythological allusions – these attributes need to exist alongside strong performance and value perceptions.



BRAND BUILDER
PERSPECTIVES

- 56 - PUNEET DAS
TATA CONSUMER PRODUCTS
- 62 - SHALABH ATRAY
RUPEEK
- 68 - VIVEK SRIVATSA
TATA MOTORS
- 76 - SHUVADIP BANERJEE
ITC LIMITED
- 80 - PRIYANKA BHARGAV
FLIPKART
- 84 - NITESH PRIYADARSHI
HINDUSTAN UNILEVER LIMITED
- 88 - PUJA CHANDNA
KELLOGG’S
- 92 - SUSHMA BARALAY
MONDELEZ



PUNEET DAS

PRESIDENT, PACKAGED BEVERAGES,
INDIA AND SOUTH ASIA,
TATA CONSUMER PRODUCTS

Puneet Das joined the Tata Group in 2017, following a long career in marketing and strategy across India and Africa. He led marketing for Tata Consumer Products beverage offerings in India during the critical period from February 2020 to March 2021, after which he became President of the Tata Consumer Products' Packaged Beverages operations. Tata's tea and coffee brands are at the forefront of the groups' FMCG expansion push: these include the legacy brands of Tata Tea; international brands like Tetley that have gained a strong foothold in India; and newer brands and expansions like Eight O'Clock Coffee and 1868 by Tata Tea.

How has this year been for you as the head of the packaged beverages business of Tata Consumer Products?

It's been interesting. I think everybody started off assuming this would be a normal financial year. Then Wave Two, and its severity, did take everyone off guard. We were all hearing a lot of bad news. Everybody knew someone who was affected. Some markets were locked down, some were semi-locked down, some were not. Most of all, we were really concerned about the safety of our teams – our warehouse and logistics teams, our frontline sales teams, and employees all across. It was challenging time from a human *and* a business point.

The priority was to ensure that everyone was safe.... as safe as possible. And then, within that, from a business POV: How do you instill a sense of calmness and keep people motivated to move the brand agenda forward? We found it relevant in these times to activate *Jaago Re* [Tata Tea's cause marketing platform, first introduced in 2008]. We've always used *Jaago Re* at times when we felt we could motivate people to become involved with an important issue. Here, we brought *Jaago Re* in line with the government's message about vaccination in Wave Two.

We wanted people to realise that they had the power to affect a change and play a role by convincing those around them to getting vaccinated – the message being that beyond getting vaccinated yourself, you should also try to bring more people along on the vaccination journey. Once we identified this message, our team really rallied together. Because all of us believed in it. So that was one of the business highlights that I would point out. Doing what was right – not just for the brand and the company, but for everyone.

Over the last year and a half, TCPL has consistently put-up excellent business growth numbers. What is the secret of this success?

As a group, we've really begun to unlock new synergies from a distribution point of view. In the past there had been the salt business, the food business, the tea business, the beverage business, and so on. These are all starting to come together – and once you start that journey, you can only go up.





Puneet Das
President, Packaged Beverages, India and South Asia,
Tata Consumer Products

And for packaged beverages specifically, we’ve put a hyperlocal strategy into place for our brands, which has started to show results for us in the market. That’s something we’re proud of. It started with the acknowledgment that tea is a very fragmented category. There are two big national players, and a host of regional players, but almost 50% of sales volumes still come from very local and ‘unbranded’ players. And as we all know, in India the food and beverage landscape is so diverse: every hundred kilometres, tastes and food habits change. People are very proud of their local culinary landscape. So, we realised that in a sense, we were competing not just at a national level with the other big brands, but also in every local district, with the local favourites. And hence, if we wanted to grow as a national player, that meant we needed to come up with new, distinct ways to win in every local pocket.

What have you learned are the keys to a successful “hyperlocal” approach?

Of course, lots of people talk about “Winning across Multiple Indias” – but what does that usually look like from marketing POV? It usually means you shoot an ad in Hindi, and then dub it into regional languages. We decided to go deeper: to review everything from product packaging, to marketing, to media distribution – and rework this marketing mix, based on bottom-up, region-by-region cultural insights.

That’s meant distinct blends of tea for different regions, with state-specific packaging, and state-specific marketing communications. We started this effort with Tata Tea Premium; over the past two years, we’ve rolled out local marketing mix across key states. For example, Tata Tea Premium in Delhi has a blend based on local preference, and it has hyperlocal communications that especially resonates with Delhi-ites. Prior to the pandemic, these hyperlocal executions included an Out Of Home campaign in which we showcased the foods and local attractions of Delhi on ads displayed on the Delhi Metro, a venue which is itself really one of the prides of the city.

One thing we learned during this process is that it’s important to move beyond stereotypes about how

outsiders see a certain market – and focus on how people within a region see *themselves*. For example: Punjabis are stereotyped as ‘living louder and larger than life.’ But when you look at it from an insider’s lens, you see that Punjab isn’t just about largeness of living, but also about largeness of *heart*. Hence, the insider truth is that they are ‘large-hearted’ towards doing good. That’s a theme we explored in our TV communications for that region. And we also tied this cultural aspect of ‘largesse’ into our product attributes, zeroing in on the state’s preference for large-grained tea blends. As a result we landed on the proposition of “Tata Tea Premium: *Desh Ki Chai, Punjab ke liye Bade daanedar waali chai.*” And the packaging, too, highlighted locals’ favorite Punjab icons and landmarks.

As a project, this kind of thing can seem very daunting and complex. You’re eventually designing, say, multiple distinct sets of packaging, multiple tea blends, all culturally informed, where you once only had to devise one. I understand why more national players haven’t attempted it. But ultimately it means you’re getting closer to your consumers, and to what you stand for. If you’re a national brand that talks about celebrating the richness and diversity of India – that means going into the different regions and connecting with the local audience and building new offerings from the ground up.

How would you say your consumers have evolved this decade? Any major shifts on how consumers respond to the FMCG category today when compared to a few years ago?

The pandemic has accelerated the already strong health and wellness trend. Not surprisingly, themes of immunity and protection have been especially resonant. Secondly, the pandemic-era preference for ‘contactless’ commerce has brought new users into the online grocery shopping arena. For tea and coffee, obviously offices were closed, out-of-home consumption declined, and people were spending more time at home. Thus, in-home consumption of hot beverages obviously went up over normal years. And alongside that, there’s been new opportunities to provide more premium tea and coffee experiences.



What initiatives has TCPL taken to retain and stand by its customers during these uncertain COVID times?

I mentioned earlier our vaccination campaign and our focus on safety – customer safety, employee safety, product safety. That was paramount.

We’ve also tried to identify elements of society that have been particularly affected by the pandemic – and asked what we could do to help. We know, for example, that tea shops play a big role in many local communities. And they were enormously affected in the pandemic. So as Tata Tea Chakra Gold brand, we launched a campaign telling people that if they donated ten rupees – the price of one cup of tea, so like a ‘virtual cup of tea’ – we would match that donation and use the funds to support hot tea shops.

Another example is India’s artisan community, which has also been enormously affected by both waves of the pandemic. For Independence Day in both years, Tata Tea Premium decided to work with artisans, in partnership with Rare Planet, to design special edition *kulhads*, that could serve as a kind of canvas for showcasing India’s rich and diverse regional art forms. And with every *kulhad* sold, not only were the proceedings going to artisan community, but we also donated to support the local artisans.

Ultimately these are all expressions of empathy. Especially with legacy brands, people don’t want to relate to you in a transactional manner. There’s an emotional relationship that we’ve built up with customers over the years – and as a group, we embrace that. Empathy is in our DNA.

What defines TCPL’s brand purpose?

Tata Consumer Products stands “For Better.” By this, we mean that we strive to be better every day in everything we do, and push boundaries to improve ourselves. We believe this will help us create better value for all stakeholders, whether they be consumers, employees, business partners or investors.



Puneet Das
President, Packaged Beverages, India and South Asia,
Tata Consumer Products

And then, of course, we also draw on “for better” as an inspiration across our products, and as an organisation. Whatever the starting point is, we’re always asking ourselves: how can we get even better than we already are? In packaged beverages we have been especially focused on making healthy products even healthier: this year, for instance, we relaunched Tetley Green Tea to add the immune support of extra vitamin C.

In today’s time, innovation seems to play an integral role in a brand’s growth. What is TCPL doing in this space to strengthen itself – even as it works to maintain its strong heritage positioning?

We are accelerating the pace of innovation significantly – we had innovation and new-product pipelines before the pandemic, of course, but now we’re prioritising them in a whole new way. Innovation has become especially important in health and wellness segment. During the pandemic, as I mentioned, we managed to rework Tetley’s green tea offering to include Vitamin C and launch it as Tetley Green Tea Immune. At the same time, we launched Tata Tea Gold Care and Chakra Gold Care, both infused with wellness ingredients like cardamon, *mulethi* and *brahmi*. We’ve also scaled up our brand Tata Tea Tulsi Green during this period.

Also, during this period, we’ve launched new products through Direct to Consumer route. It’s not just about new products: it’s also new delivery methods, formats, and packaging. And alongside this, we’ve also been expanding our premium experiences, often in DTC formats. Over the past year we launched Sonnets by Tata Coffee, which is a DTC gourmet coffee brand; 1868 by Tata Tea, which are luxury teas; and Eight O’Clock coffee, which is actually one of our international brands that, through our innovation pipeline, we identified as a premium offering to bring to India.

So Premiumisation, Direct to Consumer, and Health and Wellness - these are the three areas where we’re really focused on innovation as an opportunity.

What does the future hold for TCPL?

I think the future is quite bright. From a category point, of view one way to look it is, yes, we are already a national player and a top-two player. But the other way to look at it is, there’s still this enormous opportunity, because about 50% of India’s sales volume still comes from ‘unbranded and local’ players. With Tata’s brand name, we are one of the trusted sources when people decide they want to move into branded tea.

With our hyperlocal strategy, we’ve found a way to redefine our opportunities in every pocket and every geography. So, it’s not just about being number one or two nationally – it’s about winning in every regional pocket. That continues to be our focus in the next three to five years, alongside the innovation opportunities I mentioned before in both tea and coffee. We have also expanded and will continue strengthening our distribution reach across channels. We’ll also be strengthening our digital capabilities further so that we’re future ready. So those are some of things that will keep us very busy in the years to come – and that we’re excited for.





SHALABH ATRAY

SENIOR VICE PRESIDENT,
MARKETING & DIGITAL, RUPEEK

Shalabh Atray joined Rupeek in early 2021 – following a more than two-decade career in FMCG marketing that included senior roles at Unilever and Kraft Heinz. Fintech startup Rupeek aims to revolutionize the way Asians access credit and borrow against their household's securities.

You've been a FMCG specialist for the most part of your career. What made you make the switch into the world of Fintech?

I think that the natural evolution for a marketer these days is to get as close as one can to the internet economy. The internet economy challenges a marketer to become more "real-time." Data and feedback are flowing in and out constantly, thanks to the direct-to-consumer nature of the work.

The other interesting challenge is that in the internet economy, you work less with large cohorts of consumers. Instead, marketing is happening more at an individual, one-to-one level. I think that is a big step up for a marketer.

The Fintech sector has seen a tremendous growth in India over the last few years. What do you think has contributed to this success?

It's the coming together of digital solving the problems of consumers. Digital startups have the potential to unlock incredible growth. And they do so by finding ways to serve an existing consumer need in a way that is 10 times better than anybody has ever done in the past.

I think the reason we've seen such remarkable growth is because fintech startups have found so many opportunities to make people's lives simpler and better, compared to what was offered before: more convenient, more comfortable, more transparent.

The Fintech category is a great example how tech is an equalizer. It doesn't really recognize any divides between people: whether demographic, or with regard to income levels and so forth. The adoption of Fintech has been very democratic, very equal. And that's the beauty of Fintech, I feel, in India especially. It's not meant to be a niche offering - it's as widespread as it gets.



**Shalabh Atray**

Senior Vice President, Marketing & Digital, Rupeek

Do you see this success continuing industrywide in the years to come?

I don't think anybody can truly know the answer to that in any detail. I would say, however, that the normal principles of category growth will obviously need to apply. So you start by asking: What's the current penetration of a service that an industry is offering? And what's a reasonable ceiling for that penetration? If your industry currently only has 5% penetration countrywide, but is offering a service that could be of use to nearly all Indians, then you have enormous growth potential.

And furthermore, I think it's fair to say that for Fintech, the category still has a long way to go before it reaches its full penetration. And at Rupeek, we certainly believe that providing easier access to credit is something that is relevant to a large part of India's population.

That being said, even if the category itself has enormous upside - there's still going to be the question of which brands are going to be part of the party, and which are going to left behind. At the end of the day, consolidation is bound to happen. And the brands that will remain are the ones who provide the best consumer experience at the lowest possible cost.

From a financial services standpoint, what would you say about today's consumer? Is there a shift in the needs of today's consumer from the consumer five years ago? And what will the consumer of tomorrow need?

I think the Indian consumer always surprises you in terms of how quickly they can adopt something new, *if* it is relevant. I don't think there's any other country in the world where the rate of adoption of new technologies is faster.

But equally, it's remarkable how decisively they will *not* adopt something if it is *not* relevant. I think back to my days at FMCG, when many in the industry believed that modern trade would soon replace the *kirana* network as the dominant mode of retail commerce in India. Today, that narrative has completely changed, and you have billion-dollar digital unicorns that are thriving by finding ways to work with *kiranas*. Ultimately, this about-face happened because the Indian consumer refused change solely for change's sake.

Ordinary people valued *kiranas* for the ways that these stores provided a special kind of service to Indian communities.

So how does this principle apply to fintech, and to gold in particular? We know that Indian households place a huge value on savings - and I don't think that's going to change. It's a great national habit we have, household saving - to the tune of something like \$1 trillion in total.

Where there *is* an opportunity, is in going to those same households, and saying: here are new ways you can judiciously use your savings to further improve your financial future. I think any Fintech brand that can provide genuine opportunities in this area - that is willing to educate consumers about the new options available, and is willing to invest in great customer experience - will find a receptive audience in the years to come.

Let's talk about Rupeek now. Can you share more details on Rupeek's mission and brand purpose?

I think the larger vision that Rupeek has is quite straight-forward. Almost 95% of Indian households have some form of security, right? It could be a scooter, it could be a car, it could be gold jewellery. But only 5% of Indian households have access to formal credit - and this is because of because of some archaic structures that we've had in terms of financial service providers. Not to mention all the friction in the banking process. Rupeek sees an opportunity to correct this mismatch. We recognize that there are a lot of financial securities that Indian households already hold, and we think that they should be able to rightfully get credit against that. I think that technology has the ability to correct that divide, and that's what we want to do.

In the long term, we want to basically be an asset-backed lending platform that is able to provide secure credit to a large percentage of the Indian population. And the starting point of that, for us, is gold loans. Today, we are the best provider of doorstep gold loans in the country - by that I mean, we're the only ones who are to do it in a way that is ten times better than everybody else.

The next step for us is gold monetization. Today, thanks to very specific cultural reasons, Indian households have the largest amount of gold sitting at home of any global





Shalabh Atray
Senior Vice President, Marketing & Digital, Rupeek

consumer. But it’s a dead asset. So the next challenge for us, is helping people monetize that asset in a way that’s responsible, frictionless, and good for the consumer – that lets them keep their emotional connection to gold, but also use it as an active asset to fulfil their larger financial dreams, while holding on to treasured household property. From there, we plan to expand even further to fulfil our larger mission, which is to provide more and better ways for Indians to receive credit for their household securities.

Now I know I’ve been using the word “mission” and not “purpose.” Even in big corporate environments, we only began using the word “purpose” about ten years ago. Purpose, as I see it, is about recognizing that you have to stand for something bigger than yourself. When you do that, you’ll be more successful, anyway, because you’re looking beyond your balance sheets and engaging with the wider world, and looking to create real solutions to problems in people’s lives. You’re also going to be helped with word of mouth and virality and brand reputation – people are going to say, “I really respect what this brand is doing.” And that can be a huge asset.

But I will add that I don’t think that brands – and startups in particular – need to have a fully formed “purpose” on day one. The truth is, before brands can fully define and live out their social purpose, they have to first ensure their own survival as a business concern. Most brands find their deeper purpose along the way - no different than human beings. But there *does*, always, need to be a sense that your company is in it for more than just profit generation: you need to be focused on solving real problems out in the world.

What are the key challenges that you face while leading marketing at Rupeek?

I think the main challenge is to inspire people to think in a new way about a very old asset. At the moment, we are in the space of gold, and gold is not like ride-hailing, it’s not some new-age trend. Gold is as old as Indian civilization is. There’s a lot of emotion attached to it, a lot of weight. What is new, is the way that technology can help people acquire and use gold in new ways. And so, as marketers, we need to both honour the tradition of gold, but also help people to transcend any existing biases around gold that might keep them from drawing on it in ways that can further strengthen their households.

Trust is a critical factor for consumers while dealing with any financial institution or instrument. How does a relatively new company like Rupeek gain trust of its consumers in this socially distant world?

Trust is basically about two things: making a promise, and delivering on the promise. There are two parts to it. If you’re attracting new consumers, you’ve got to communicate your promise in a way that feels transparent, straightforward, and compelling. Then it’s about living up to the promise that you basically asked them to trust you on.

For us, getting consumers to “buy in” into our promise has meant not only telling them a functional story about gold loans. It also means finding ways to emotionally connect with consumers, and show them that we understand their lives on a deeper level. In that way, trust is built on empathy and understanding – which is something that working in the FMCG universe teaches you very well.

New-age, digitally-driven performance marketing doesn’t necessarily teach you those empathy skills. It’s more about finding the trigger for that immediate click, and sealing the deal as fast as possible. Today, I think you need a balance of conventional and new approaches. But I still firmly believe that all of the greatest marketing insights are born of empathy - which comes from seeing your audience not just as *consumers*, but as people. No one wakes up in the morning thinking about what kind of detergent they want to buy that day. But they do wake up with their life problems and aspirations that you can, and should, try to connect with as a marketer.

In the case of Rupeek, when working on our brand campaign, we knew we had to go beyond the functional benefits we’re offering. We wanted to tie that functional story to credible, emotional human narratives. Which is why we decided to work with Manoj Bajpayee and Priyamani as brand ambassadors. It wasn’t just about finding celebrities who could attract the maximum number of eyeballs – it was about, who could tell credible, emotionally resonant stories once that attention had been captured? With Manoj, for instance, people know that this is a person who has come from humble beginnings, had financial struggles, and then has built up an incredible career based on hard work and strong values.





VIVEK SRIVATSA

HEAD OF MARKETING,
PASSENGER VEHICLES, TATA MOTORS

Vivek Srivatsa joined Tata Motors as head of Marketing in 2016, after more than two decades of working in sales and marketing in the Automobile and Consumer Durable industries. During his tenure, Tata Motors has grown from a brand largely serving corporate fleets, to becoming a major player in India's consumer automobile market.

The last few years have been tough for the automotive industry as a whole. How has Tata Motors coped up with the challenges of demand-supply and COVID in general?

Even in "normal" times, automotive is one of the most complex supply-chain industries. And COVID has had an enormous impact on both the demand side and supply side. So that's been quite a challenge. With respect to how Tata Motors has managed: obviously right up front, we knew that we had to have very good visibility into our demand. We have a fairly high number of auto models, if you break our offerings down further into their variants and customization packs. That could have turned into a supply chain nightmare – but fortunately, we prioritized gaining good forward visibility on what the texture of demand was going to be.

We also put a lot of effort into marketing - especially during the period of April to June 2020, when much of the industry had gone into kind of a shell. We took a firm step forward during this time and started focusing on demand generation. And that, by itself, gave us a good visibility into the kinds of supply chain requirements and challenges we were going to face in the future. That was the first phase response for us.

The second phase was to try to spread the demand across our products and our manufacturing plants as well. One of the biggest nightmares an auto company could have in this period would be to have a very large percentage of its demand coming from only one or two products. Fortunately, of our five base products at that time, I can firmly say that four of them accounted for more than 90% of our volume. That kind of spread allowed us to be quite flexible in terms of how we used our resources: manufacturing resources, supply chain resources, and front-end resources for managing customer service.

We also went through, in India, some not-very-homogenous waves of infection across the country. We devised new protocols that helped us shift production to those plants that were most operational at any point in time. On the manufacturing and design side, we also proactively realigned the feature package in our products, in order to "right-size" our use of semiconductors, which right now are in short supply.

And last but not least, across the last 20-odd months we have continuously kept the market excited. We have had a couple of all new products launch – and just as importantly, beyond these new nameplates, we have also ramped up our rollout of special editions and limited editions, as well as constant feature updates. For us, the typical auto industry practice of waiting every three years to unveil significant platform updates no longer makes sense. Instead, we've found ways to keep our customer base continuously engaged with new offerings.

What defines Tata Motors's brand vision? And under your leadership, what values would you want consumers to associate with the brand?

In 2017, we put across a brand vision as "connecting aspirations." And subsequently, "connecting aspirations" has really guided our path through the pandemic. The aspirations we talk about these days about have taken on a new urgency – they're not far-off dreams, but short-term, real-world hopes with real stakes. Starting in April and May 2020, we saw our role as helping people to keep alive the aspiration of, someday soon, traveling safely to see their families again. Of regaining the freedom of absolute mobility, which comes with owning a personal transport vehicle – now that private vehicles feel like the safest mobility option.





Vivek Srivatsa
Head of Marketing, Passenger Vehicles, Tata Motors

As the world has opened up, we’ve evolved our marketing to reflect new moods of optimism and possibility. But we are always connecting back to that core value of safety, and to the ways that the pandemic has actually raised the stakes of people’s personal mobility dreams.

Looking beyond safety, another pillar of Tata Motor’s brand vision is really about providing real-world value to customers. Not just in terms of an attractive price tag, or car specs that look good on paper. Driving pleasure in the real world is something we’ve really made a big focus for our brand. The truth is that in India, sometimes driving the car - in traffic, or on rough roads - can become really painful. As a brand, we’ve decided to really focus how we can make driving more enjoyable on an emotional level. It’s not just about saying we have the most powerful engine, the latest dashboard technology. It’s about staying closely attuned how our cars perform on real Indian roads, during real Indian commutes, to provide the customer with a safe but exciting ride.

In your over 5 years at TML, how have you seen your consumer evolving?

The Indian consumer has been on a progressively faster evolution. Today, the Indian customer has moved away from seeing rupee value as the primary driver for purchase decision. They’re not only going for the absolute cheapest product. A decade back, the cheapest product was automatically assumed to be delivering the best value. But today, there are many examples within our product portfolios where it’s the most expensive version of our product that is selling the best.

The consumer today has a more holistic view of value – and they’re increasingly willing to pay more to get more. And we see this not only in the larger cities, but also in the smaller towns. People are becoming more sensitive to value not only in terms of physical features, the things that they can see, but also to intangible values like brand reliability and safety.

The second huge change I see is in the amount of information that today’s customers are able to assimilate into their purchasing decisions. That links back to customers’ increasing digital savvy – they have more resources, product comparisons, and reviews available to them than ever

before. But most of all, customers have gotten much better at understanding *themselves*. They’re able to research the market and identify what features and products *they* truly want. Customers today are making very educated purchase decisions - guided not by what other people in their friend group are buying, but rather by their own individual needs and tastes. This is an incredible mindset, and the speed at which it has changed is truly amazing.

Nowadays consumers value brands not just for what they can do for individuals, but also for what they can contribute to society. What are the roles you see for a brand like TML in the realms of sustainability and corporate social responsibility?

In the near term, we’ll always strive to respond to the most pressing social needs of the day. At the height of the pandemic, we had our plants manufacturing PPE suits, ventilators and other important protective equipment for the frontline workers.

Taking the longer view, we understand that the evolution to electric is going to be crucial not only for the environment, but also for supporting the Indian customer and the Indian government. Done right, electric has huge upside as a sustainable and cheap means of mobility. The more electric cars are on the road, for instance, the less money the government needs to spend on fuel imports and subsidies. Which means that more money can be spent on social development and environmental protection programs, for instance.

Today, we are probably the only Indian manufacturer that has fully embraced the shift to electric. But beyond our numerical market share, what’s just as important is our work educating the the Indian customer about the benefits of electric vehicles. We are opening up customer’s eyes to the fact that having an electric vehicle is actually feasible, enjoyable, and economical.

How can automobile brands stay agile in an industry known for long product development cycles?

Agility is what really sustained our growth over the last twenty-odd months. Now, in order to be agile, you have to learn to correctly identify the changes happening around you – and then be able to respond those changes quickly.





Vivek Srivatsa
Head of Marketing, Passenger Vehicles, Tata Motors

When it comes to understanding these changing times, that’s where the customer insight work we’ve done with Kantar really helps us. There is a lot of customer understanding and trendspotting that we do, with the aim of dialling those insights back into our products.

As you note, the automotive industry has traditionally seen very long lead times in design and manufacturing. But we’ve found ways to actually refresh our product ranges in much shorter cycles, from six months to a year. This insight is the cornerstone of a product development theme we call “The New Forever,” which we launched in January 2020. It’s a commitment that we made to move beyond that traditional three-year upgrade cycle.

In the months and years since launching “The New Forever,” we’ve found that not only can we continuously turn around new features and special editions – but also that this is also something that people truly value. We have some really good examples: The Harrier Dark and Camo editions have been particular customer favourites. Executing on this kind of continual iteration is not easy, and it always comes a certain level of risk. But managing that risk, and not allowing it to hold us back, is something we have done very well.

How much of a role has digital played in transforming your business?

Digital has helped us in so many ways – it’s been a game changer in allowing us to reach out directly to customers in a one-to-one way. And it’s also been crucial for helping us to better understand and influence supply-demand cycles, as I spoke of earlier. But even so, we still have huge opportunities ahead in terms of digitalization and becoming on par with the native digital companies.

Digital-first consumer research has also become a very big influence on how we manage our more accelerated product refresh cycles. The feedback we receive from our customers online – whether that’s the comments they give on our social media handles, or what they write on the blogs and forums we follow – has all played an important role in guiding our “The New Forever” initiative.

What is that one thing that TML want consumers to leave with after buying the product?

This is something that has been evolving very rapidly for us. In 2015, 90 percent of our customers were from the commercial side. We were selling a lot of taxis and fleet cars. But today we are rapidly changing, to the extent that 99.5 percent of our sales are now to individual customers.

Even so, there are two clear goals for us after customers take one of our vehicles home. First, we want to deliver real driving value to the customers – not just notional value or cost savings. A few years back, we were the cheapest car you could buy. Today, upfront, we are not the cheapest car, and we don’t want to be there. But what we do want to do is continue to provide people with the best value for their money. The value of a Tata Motors Vehicle should be something customers can touch and feel and see. And that’s something that we’ve really been investing in. In every design component of our cars, we’d now rather go for an enhanced look and feel and touch, rather than simply the cheapest component. Our limited editions are especially useful in demonstrating this renewed commitment to great design.

The second goal for us in ensuring that our cars’ resale value continues to grow – which speaks to both our brand reputation and our product reliability. Our quality of after-purchase service has improved dramatically. Our cars last much longer, and are much better quality, even after four or five years on the road. That’s another view into value that we want to be sure we’re providing our customers.







SHUVADIP BANERJEE

VICE PRESIDENT, MARKETING SERVICES,
ITC LIMITED

Shuvadip Banerjee joined ITC Limited's consumer insights team in 2007, and now helps to oversee the group's Marketing Services operations. In the FMCG realm, ITC's brands include major names like Aashirvaad atta, Sunfeast biscuits, and Yippee! noodles.

What have been the key hits of 2021 for ITC's Foods business?

ITC has seen a plethora of new launches, both in the spaces of "Health and Nutrition," and in Indulgence. With an eye toward India's gradual opening-up, we have strengthened our partnerships with organisations like Dominos, McDonald's, and INOX cinemas, which has helped us capitalize on those aspects of out-of-home consumption that are best primed for a revival. In the meanwhile, www.itcstore.in became an important new capability for ITC to generate rich consumer data and impactful insights. Purpose-driven marketing has grown within the organisation and percolated across many brands. Purpose-driven themes like 'improving mental wellbeing,' 'better utilisation of plastic,' and 'regaining lost livelihoods' have helped strengthen the core of our brands, and also win the trust of the consumers.

The foods business is a tough one – with competition not just from national and global FCMG giants, but also a very significant and strong unstructured market. How does ITC deal with this and grow despite such stiff competition?

With less than 20% of the food and beverage market being branded, and India being such a diverse country in terms of consumer preferences, regionalisation has become one of the core tenets of our business. Rich consumer insights have always been the guiding light to creating successful challenger brands in our key operating categories. A deep understanding of consumers has helped us in not only building world class brands, but also has been instrumental in converting unbranded buying behaviour into branded form – as seen in the success of brands like Aashirvaad. By walking the path along with our rapidly evolving consumers, and by making consistent investments towards brand building, ITC has been able to: reach one in every second household of this country; grow its business with a 17% CAGR (10 yrs); and create brands like Aashirvaad, Bingo!, and Sunfeast, which are all market leaders in the segments that they operate in.





Shuvadip Banerjee
Vice President, Marketing Services, ITC Limited

COVID-19 has been tough on us all. In addition to helping their consumers, how did ITC manage to keep their own employees going during these challenging times?

We realised the strength of the ITC family in all its true potential when we were hit by this unfortunate event. All of us went way beyond our call of duty, and the entire organization was up and running in exactly three days from lockdown. Kudos are especially due to the manufacturing and distribution teams, who were there on the ground ensuring that consumers could continue to find their favourite brands easily. Cross-functional teams were put into action, solving for specific business problems and identifying opportunities to strengthen relationships with consumers. These cross-functional programs not only gave the team an opportunity to expand their breadth of knowledge, but also gave them a specific purpose during this trying time.

ITC ensured that we stood by each and every employee and their family members. Partnerships with various hospitals and creating a panel of doctors enabled us to cater to the needs of our employees at the earliest. An application was created for the employees so that each one of us could share all relevant health information in almost real-time. All factory workers were supported with 'We care kits,' ensuring safety and basic food and beverage provisions. To manage mental wellness, various support programs were organised, and learning sessions were conducted around popular and specific topics through internationally acclaimed speakers. Thanks to our hotel business, we were also in the unique position of being able to encourage employee staycations for mental well-being.

BrandZ India's theme for 2021 is "Leading with purpose." What does this mean for you, and how has it been embodied by your brands?

ITC has always believed in a strong purpose. Beyond ensuring good returns to its shareholders, it has always ensured sustained returns to the environment and society. For more than a decade, ITC has been the only organisation of its size that has been water, carbon, and solid-waste positive. More than 40% of the energy consumed by ITC now comes from renewable sources. Through women empowerment programs, we have created and sustained livelihoods for over 78,000 women. ITC continues to not only speak its intent, but walk the path at scale in its ability to give back to the society and environment. The fact that while doing so, ITC has also continued to be one of the fastest-growing among India's Top 5 FMCG companies, shows that purpose and growth can easily go hand-in-hand.





PRIYANKA BHARGAV

SENIOR DIRECTOR OF BRAND MARKETING,
HEAD OF RESEARCH & INSIGHTS, FLIPKART

Priyanka Bhargav joined Flipkart in 2019. Her nearly two-decade long marketing and insights career has spanned the ecommerce, telecom, FMCG, infrastructure, aviation, and government sectors. Since its founding in 2007, ecommerce brand Flipkart has grown to become India's largest startup unicorn.

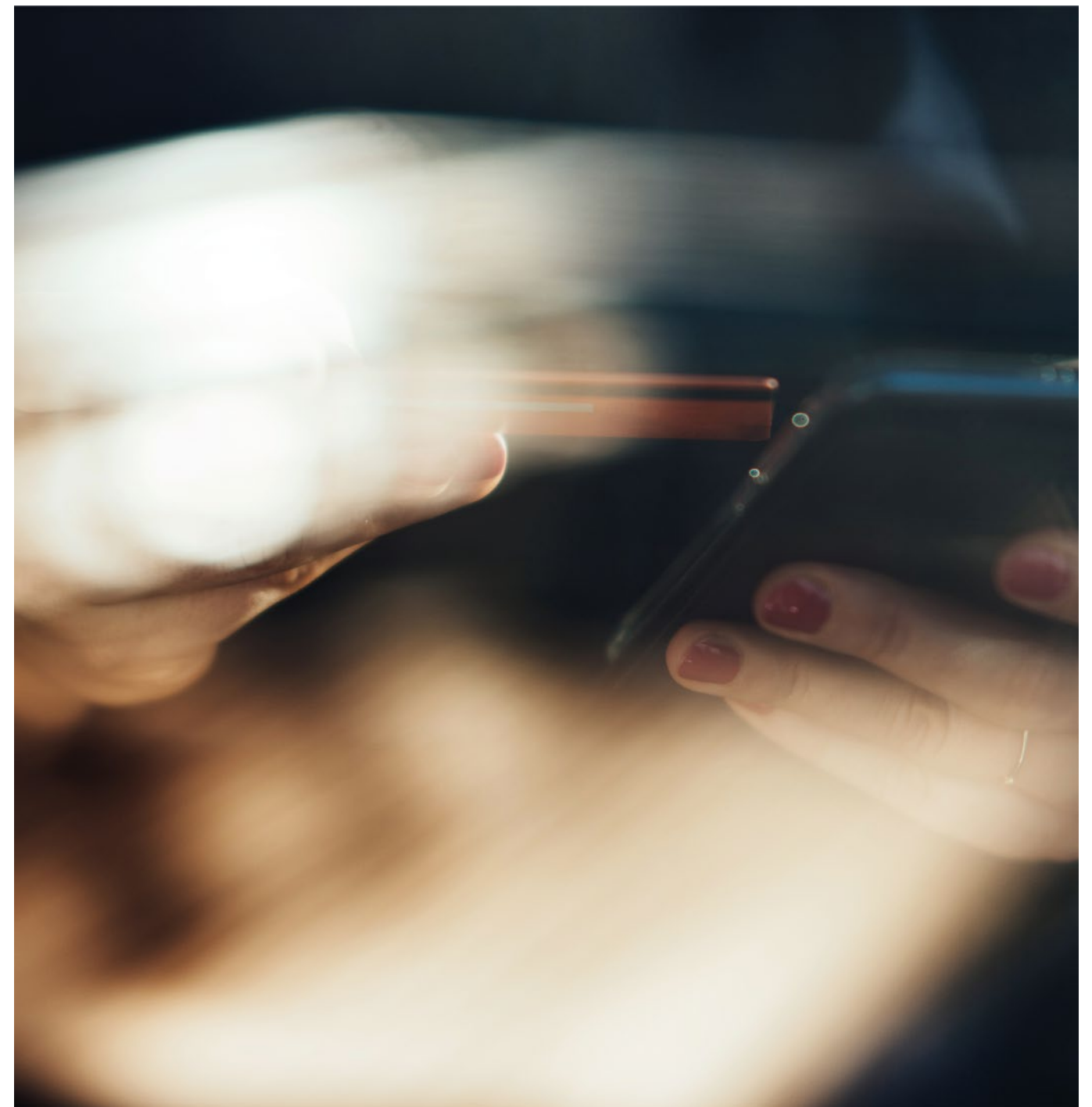
Ecommerce became a lifeline for Indians over the last year and a half. How did the Flipkart cope with the many challenges that a once in a lifetime phenomenon brought about?

In the wake of the pandemic, ecommerce played a vital role in supporting the demand and supply framework; it made both essentials and non-essentials available for stay-at-home consumers. The efforts of sellers (and especially micro, small, and medium enterprises), backed by a well-oiled supply chain, have been pivotal in fulfilling the needs of a wide consumer base, while at the same time ensuring everyone's safety.

At Flipkart, our focus was on working with various ecosystem partners, supporting technological innovations, and ensuring on the health and safety of our stakeholders. We saw our role as helping all of these entities to run smoothly despite the inherent external challenges.

In those uncertain times, for instance, we worked with our seller community to enable their business readiness: offering them flexibility, health insurance plans, financial aid, and other initiatives to help them make a comeback. Innovation-wise, we launched the Voice Assistant feature for the Grocery category, which has helped millions of customers from smaller cities simplify their entire purchase process. Over the course of 2020 and 2021, we launched various regional language interfaces like Hindi, Telugu, Tamil, Kannada, Marathi, and Gujarati.

We continue to strive towards our mission of transforming the consumer internet ecosystem in India and providing consumers access and value.





Priyanka Bhargav
Senior Director of Brand Marketing,
Head of Research & Insights, Flipkart

What is the secret of Flipkart’s agility and nimbleness?

Our values of “Audacity,” “Bias for Action,” “Customer First with Integrity,” and “Inclusion” are the basis of our company culture, and every Flipster strongly believes in them. These values in a sense prepared us for the curveball that the pandemic threw at us. During this time, we not only managed to continue with business as usual – we also launched new constructs, and executed India’s biggest festive sale event. We have witnessed tremendous examples of “Audacity” and “Bias for Action” in which teams went above and beyond to ensure that customers received their products on time. Our customer service teams understood the plight and stress of our customers, and worked extra hard to resolve customer complaints. Our technology, supply chain, and category teams worked extra hard to launch our Grocery and Flipkart Quick offerings, which ensured that more customers could get their products quickly. And our Private Labels teams launched our own brands of sanitizers and masks when these products were in short supply. All of these developments began with data-backed business insights – but to execute on these insights in unprecedented times, we relied on our core values and company culture.

Companies today must be at the centre of tech advancements. This is all the more true for ecommerce players. How is Flipkart innovating to transform its business and to better suit the needs of an ever-changing consumer base?

Innovation is in the DNA of Flipsters and Flipkart, and this translates into every customer experience. Recent innovations include: Intelligent product selection basis of what’s trending; personalisation to ensure customers get to view products that are in line with purchase history; and scaling up supply chain management to provide quick (even 90 minute!) delivery to customers.

FK Camera is the new addition to this long list of innovations. Instead of just imagining a product, customers can experience it from the comfort of their homes, as if it were the real thing. Buying some furniture? Why fiddle with measuring tapes when one can simply tap on “View in your space,” and see a true-to-scale replica of the article in your living room? While that may seem simple on the surface, the work that goes into bringing an immersive shopping experience is anything but easy. But we do whatever it takes to give a seamless experience to our customers.

How does Flipkart manage to hold consumer trust in tough times and whilst competing against a formidable competition?

Flipkart’s philosophy has always been to put the customer – not the competitor - at the centre of its decisions. And this strategy has worked out very well. Over the years, we have made the right tech and supply chain investments to make ecommerce be an everyday choice for customers. The key is to be in constant communication with our customers. During the pandemic, and despite all the challenges of lockdown, Flipkart ensured that we could continue to deliver essentials to our customers. Curbside delivery ensured that customer safety; as soon as it became possible, our Wishmasters were vaccinated on priority, for their safety and for the safety of our customers. All the while, Flipkart has continued to build trust with its customers by providing a wide selection of products, with the best quality and the best value.

People value brands not just for what they can do for individuals, but also for how they contribute to society. What are the roles you see for a brand like Flipkart in the realms of sustainability and social responsibility?

Sustainability is an integral part of the way we conduct business at Flipkart. Today, we have eliminated single-use plastic from our own supply chain, and more than 75% of Flipkart’s seller fulfilled shipments are now being processed in sustainable packaging. We have made a public commitment to introduce 25,000 Electric Vehicles in our supply chain by 2030, and the number as we speak stands at 2,000 EVs and is growing daily. These 2,000 electric two-wheelers and three-wheelers have been deployed across 90 cities in India.





NITESH PRIYADARSHI

VICE PRESIDENT, CONSUMER & MARKET
INSIGHTS, HINDUSTAN UNILEVER LIMITED

In the course of his 15-year career with FMCG giant Unilever, Nitesh Priyadarshi has held Marketing Insight roles in Asia, the UK, and South America. In his current role with Hindustan Unilever Limited (HUL) in Mumbai, he oversees Insights for the South Asia cluster, across a stable of brands that includes such iconic names as Brooke Bond Red Label, Lifebuoy, Surf Excel, and Dove.

What kind of changes have you observed in the consumer over the last year and a half?

The most telling behaviour for much of the pandemic was fear – from the “fear of the unknown” in the First Wave, to “fear of the virus hitting closer home” in Wave 2. For many, the fear of not having enough money to tide over the situation ranked higher than the fear of contracting the virus itself. And of course, the impact of the virus in the Second Wave was not limited to physical health, but also caused aggravated mental health and anxiety. More recently, mobility has almost returned to pre-pandemic levels – and we hope that with the proposed opening up of offices and educational institutions, we might soon resume leading a more normal life.

That being said, not everything will return to normal. One lasting change can be seen in what might be called “conscious consumption.” Consumers’ search for value continues, as incomes remain stretched. Brands have multiple ways they can signal value to these cost-conscious consumers: from offering “price-point access packs,” to highlighting ways that their products are “longer lasting,” “lower cost per usage,” or “multi-use.”

Similarly, although some of consumers’ more vigilant hygiene habits may now be on the wane (e.g. sanitising doorknobs, disinfecting all parcels), their interest in immunity-building habits and products should remain high for some time. Consumers are building resilience with homemade ingredients like turmeric, ginger, and lime, and are seeking immunity through more advanced health supplements containing zinc and vitamin C. Holistic health and wellbeing will continue to extend beyond physical health.





Nitesh Priyadarshi
Vice President, Consumer and Market Insights,
Hindustan Unilever Limited

There have been a lot of shifts in demand, especially in the personal care and home care categories due to the pandemic. How has Hindustan Unilever coped with these changes?

First, we had to understand exactly how and why demand for each category was shifting. Some categories were what we identified as “COVID Obsessive.” These categories – which included hygiene bathing soaps, sanitisers, handwash, toilet, and floor cleaners – saw unprecedented growths during Covid times. Now the task for us is to manage the downshift in demand for these categories in a way that ensures that our brands still remain an important part of consumer’s lives. Moreover, the downshift in demand for some of these categories may still settle at a higher level than the pre pandemic consumption.

Other categories, like tea, shampoo and laundry, remained “COVID Relevant” and / or “COVID Resistant”: they saw an initial fluctuation in demand during the First Wave, but have since returned to more predictable pre-COVID consumption patterns. And categories that relied more on discretionary and out of home spending – products like skin care, and ice cream – initially took a significant hit, but are now coming back as mobility returns to normal.

These highly unusual changes in category behaviour – which were all happening at the same time – meant that HUL had to pivot to focus more on the growing segments, while finding new relevance in the context of the pandemic for the discretionary categories. What helped HUL was that its portfolio of brands straddled across price and benefit segments.

Organisational agility, resilience, and remaining competitive in the face of adversity – all while taking care of our people and the community – has been the hallmark of our performance in the past year and a half.

With the shift in consumer demand and preferences, have the ways in which you conduct research also changed?

With the onset of COVID-19 and the sudden curtailment of face-to-face research, the existing well-oiled HUL Insights Engine was undeniably challenged. Our HUL Consumer and Market Insights (CMI) team quickly took stock of the situation and pivoted to deliver great insights in a new way, to help drive competitive growth by identifying opportunities in the middle of uncertainties and slowdowns.

It helped that CMI was already on a journey to “Reimagine Insights,” as a part of “Reimagining HUL” – digitising research through various means and new age tools. This meant, for example, conducting almost 5,000 consumer, shopper, and retailer connects done through chat and video interfaces in the first three months of lockdown. While India went in complete lockdown, consumer insights and consumer centricity remained open in HUL 24/7!

Similarly, when retail stock availability data became hard to come by through conventional sources, CMI launched, in record time, a week-on-week telephonic survey among 3,000 retailers. This allowed us to deliver insights on brand availability across states, and helped us identify immediate hot-spots and actions by brand. We also worked with our research partners to devise new, more “contactless” and online methods for Innovation, product, and communication research – thereby adopting agile, lean methodologies for insightful business decisions.

We also invested in building our People Data Centre few years ago, and “Shark Tank” programs to hunt for new means of doing research (e.g. more online, social, and search-led methodologies). This further came in handy during this crisis, helping us to understand consumer needs and demands without the need to ask questions face-to-face.





PUJA CHANDNA

ASSOCIATE DIRECTOR, INSIGHTS & ANALYTICS, KELLOGG'S INDIA

Puja Chandna joined Kellogg in 2018, following a decade-long career at Unilever. She has worked in Marketing Insights for over 20 years. Kellogg's first entered the Indian market in 1994; following an increase in at-home food consumption during the pandemic, the brand has moved to expand its range of breakfast-focused product offerings within the country.

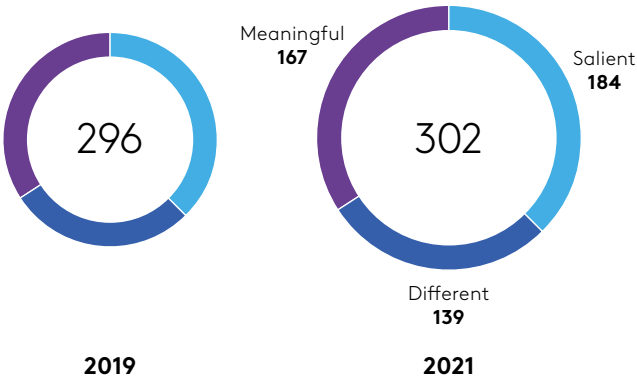
There has been a lot of talk about better nutrition and healthy eating since the last year and a half. How has Kellogg's adapted to this change in consumer behaviour?

At Kellogg's, we define our target group as consumers who seek a nutritious wholesome breakfast for their families on busy mornings, so that they can be at their physical and mental best.

COVID-19 accelerated the adoption of nutritious healthy eating. But with all family members at home, it also increased the pressure on homemakers to cater to everybody's demands. Shoppers were actively seeking brands that cater specifically to breakfast occasions and snacking moments - as main meals are more sacrosanct, and usually eaten fresh and hot in India.

Kellogg's has the terrific triad of Health, Taste, and Convenience - and hence, in recent years we have gone from strength to strength on Brand Power. In BrandZ™ terms, Kellogg's has gained on Salience and is a Meaningful brand in the minds of consumers. We also gained on market penetration as well, as consumption increased with more family members eating more often.

Strongest ever brand equity
Kellogg's brand power (Kantar)





Puja Chandna
Associate Director, Insights & Analytics, Kellogg’s India

What kind of challenges has Kellogg’s faced in changing Indian consumers breakfast habits?

From early on, consumer ‘usage and attitude’ studies have revealed to us that a huge proportion of Indians have a nutritionally inadequate breakfast. They just have milk or tea and biscuits, and then get down to the day’s activities – be it school, college, office work, or household chores. We decided to own the millions of skipped and skimmed breakfast occasions. Thus, the key task for Kellogg’s master brand has been to build the relevance of eating a nutritionally adequate breakfast.

Another challenge that we faced is ensuring awareness for our products. Take an offering like Muesli, for example. Being the category leader, the task of category creation and demystification for ‘Muesli’ naturally falls on us. And we decided to be bold in how we built consumer awareness of Muesli’s health benefits. Through consumer work, we understood that nutritional inclusions and fortifications were a key driver of purchase for an offering like Muesli: Our nutrition-seeking audience habitually reads the back of pack before making a purchase decision. Thus, we decided to go one step further, and bring the information on inclusions to the front of pack; our new Muesli packaging visually arrests the shoppers at the first moment of truth.

What is Kellogg’s brand purpose and how does the brand follow through on it?

Kellogg’s purpose is to nourish India’s potential through its nutritious food offerings. And this calls out our number one job: to serve consumers who need nutrition and don’t have the time, as many urban Indian consumers skip or skimp breakfast due to lack of time.

We have a healthy business that’s building on a simple strategy of making cereals relevant in the largest dairy – and grain-consuming market in the world. This strategy comes alive with a variety of solutions. One of them is to look at local recognisable taste profiles, such as Kesar Badam, Thandai Badam or Rose Badam in Kellogg’s Cornflakes. Another solution is to introduce products in different formats and sizes at various price points, like Kellogg’s Chocos Fills (centre-filled pillows), which start

at Rs. 20/-. In order to make our food accessible and affordable, we now have a variety of our cereals available at Rs. 5, 10 and Rs. 20/- price points. Our Muesli packs cater to the busy millennials who want the nourishment of multigrain and fruits, nuts, and seeds that give them the energy to achieve their daily goals.

We want to be a brand that has affinity not just in the big metros, but across Tier 2 towns, and to be a part of a large variety of Indians’ breakfast repertoire.

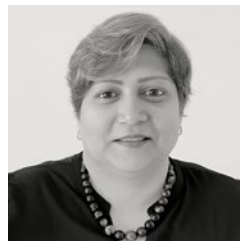
Let’s talk about the most successful marketing campaign that you’ve been a part of at Kellogg’s. What was it and what made it click with Indians?

Our Masterbrand campaign, “*Ek Chamach Aur*” won the Kantar Creativeness Effectiveness Award in the Food & Beverage Category. The ad performed brilliantly not just in LINK testing, but also gave us exceptional results in the market!

The hallmark of a good creative is when it tugs at the heart strings while giving a rational message as well. *Ek Chamach Aur* managed to do exactly that. Every Indian mother would have told her kids to have “*Ek Chamach Aur*” or “one more bite” of food in her endeavor to ensure that the child eats a nutritionally adequate breakfast and achieve their daily triumphs, be it in academics, sports or any other activity. As Kellogg’s, we wanted to partner with moms in this journey as Kellogg’s gives the Power of 5 (Energy, Proteins, Vitamins, Iron, and Calcium) and help children achieve their best every day.

There’s something in this campaign for moms of kids across gender, age groups, and interests. This is an important metric given that building relevance (and hence, penetration) is our core job.





SUSHMA BARALAY

HEAD, INSIGHTS & ANALYTICS, INDIA
MONDELEZ INTERNATIONAL

Sushma Baralay has been in the consumer insights industry for nearly two decades, and currently leads the Insights and Analytics practice for Mondelez International in India. Mondelez's brands in India include Cadbury Dairy Milk, Oreo, and Bournvita.

Who does Mondelez define as its key consumer, and why?

We understand that consumer snacking preferences change depending on a person's context and needs at any point in time. The same consumer can behave differently at different points of the day. We therefore ensure that we are available with the right snack for the right moment, made the right way - so that the specific need of that consumer is met.

The focus on healthy and immunity-boosting foods increased during COVID times. Did you feel a shift in demand due to this change in consumer preferences? If so, how did the brand adapt to this change?

We saw two broad factors that influenced shifts in consumer behaviour during the pandemic. COVID-19 created a sense of fear, to be sure - and with that, a rise in attention to health and hygiene, and a consumer desire for reassurance via the brands they buy. People turned to trusted brands more than ever for safety.

During this time, Cadbury Dairy Milk was already the most trusted brand in the country - and thus, we were able to launch credible campaigns around themes of reassurance and positivity. Bournvita brand, which is a health food drink in our portfolio, also saw traction thanks to the way that its offerings build inner strength and immunity.

The other big influence on consumer behaviour was the shift toward more "restricted" living. People couldn't live normally and do things that they would normally do, like going out or socially bonding with friends and family. Instead, we saw a shift toward consumers nesting at home. And in this 'nesting' phase, when comfort was at a premium, people sought a balance of between indulgent and healthy snacks.

All of this has accelerated the growth of snacking in India. As per Mondelez International's second annual State of Snacking Report, we see that 88% of Indians are snacking more, with a focus on better control over their portions; furthermore, 75% of Indians relied on snacks for nourishment during the pandemic.





Sushma Baralay
Head, Insights & Analytics, India, Mondelez International

Again, finding ways to satisfy bouth indulgence and nourishment has been key. Many of our recent innovations cater to consumers who looking for ‘good for you’ products – this includes Cadbury Fuse Fit, which we recently launched. We also expanded our presence in the morning snacking occasion with the launch of Bournvita fills – an easy to eat and nutritious snack that can be had with or without milk.

What is Mondelēz India’s brand purpose, and how does the brand follow through on it?

At Mondelēz India, we are guided by our purpose of “Snacking Made Right” and promise to empower consumers by offering the right snack, for the right moment, made the right way. What this really means is providing our consumers a broad range of delicious, high-quality snacks to satisfy every occasion, with more sustainably sourced ingredients that they feel good about.

We live our promise, not just through our wide portfolio of snacking options, but also by consciously working towards future where we strike a balance between sustainability and feasibility. There are multiple efforts being led in the country that underscore the company’s sustainability and well-being agendas.

One example would be our Cocoa Life Programme, an initiative operational in the country since 1965 that has supported over 100,000 farmers in the states of Tamil Nadu, Kerala, Karnataka, and Andhra Pradesh. We have helped these farmers turn cocoa farming into a business of choice, along with building inclusive and empowered communities working towards forest restoration. The initiative reiterates Mondelēz India’s commitment to respond to consumer demand through sustainably sourced cocoa.

Another priority of ours globally is encouraging the recycling of multi-layer plastics, and driving a circular economy – all while focusing on packaging elimination and renovation. In India, our key focus is on driving recycling infrastructure for multi-layered plastics (MLP) at scale to address the issue of waste management. Over the years, significant measures have also been taken to simplify

packaging design, with the goal of reducing the impact on the environment. Earlier this year, Mondelēz India also announced a grant to Hasiru Dala, an NGO that will recycle Multi-Layered Plastic (MLP) waste to create sustainable furniture boards for creating tables, benches, and for other uses.

What role does innovation play in your line of business?

At Mondelēz India, innovation plays a key role in business transformation, cutting across areas of product creation, sales, and supply chain and our well-curated brand campaigns. Within innovation, technology continues to be a catalyst that’s driving growth across categories.

With product innovation, in particular, our innovation narrative not only includes new inventions in the existing categories, but there also a clear focus on driving growth through partnerships and expanding into newer categories. This is commonly referred to as our ‘close-in adjacencies’ strategy. To give you a few examples, Oreo since its introduction has successfully created a niche market for itself with innovations like Cadbury Dairy Milk Silk Oreo, Golden Oreo, Oreo Cadbury Dipped, Cornetto Oreo, and Oreo & Cream, giving a new direction to Mondelēz’s biscuit narrative in India.

Under Cadbury, some of the recent innovations include the launch of Cadbury Chocobakes, marking our entry into the fast-growing bakery segment. Similarly, the introduction of Cadbury Spready helped Mondelēz enter the ‘chocolate spread’ category. Additionally, the brand recently forayed into the snack bar category with the launch of Cadbury Fuse Fit.

In addition to introducing relatable and in-demand innovations, the company continues to roll out new initiatives to reach the consumer without compromising on time and safety. Some of these efforts include direct store deliveries, hyperlocal partnerships, residential deliveries, and a strong e-commerce strategy. During the pandemic, technological innovation helped us to move stocks closer to consumption centres, and ensure a faster turnaround time to market.



Then, of course, there’s marketing innovation. At Mondelēz India, well-crafted brand campaigns have played a key role in strengthening consumer love for our brand. Cadbury Dairy Milk’s seven-decade journey in India has been strengthened by wonderful campaigns that emphasise the theme of generosity. Today, backed by strong insights and technology, our marketing capabilities have helped drive organic growth and establish meaningful connections with consumers. Some of our recent award-winning campaigns include ‘Purple Heart’, a refreshed version of an iconic cricket ad – as well as our most recent Diwali campaign, Not Just a Cadbury Ad 2.0, which was tech and AI enabled.

Let’s talk about a campaign you launched earlier this year around mental health- Cadbury Bournvita #GetTheMessage. What was the inspiration behind this campaign and what sort of response has it received thus far?

For children pandemic led to restricted physical movements, isolation, and virtual classrooms. Many kids began to struggle with their mental health - showing subtle signs of distress that were often missed or misread by parents who, of course, were themselves trying to adapt to the new normal. As a brand that places progressive parenting at its core, we wanted Bournvita’s recent campaign to focus on the mental and emotional wellbeing of children – and to move this topic from ‘attention’ to ‘action.’

To help parents support them in their journey, Mondelēz along with Ogilvy India launched #GetTheMessage, an integrated campaign to help parents focus on their children’s mental wellbeing and provide them with resources to sensitively handle the growing mental and emotional challenges that children face. This campaign included features like a chat bot, a-toll free helpline for parents, and a website, www.mannkitayyari.in, that was created in partnership with The MINDS Foundation, an NGO formed by mental health experts which does a lot of work in this space. The goal of all of these tools was to share curated information and to empower parents on the topic of childhood mental help. The initial results of the campaign have been great – both in terms of people’s engagement with our creative, as well as in terms of the call volumes we’re receiving – and we are tracking it continuously.

FUTURE FOCUS

- 98 – PARU MINOCHA & MACNEIL CHOWDHURY SUSTAINABILITY
 - 102 – PUNEET AVASTHI THE DIGITAL DIVIDEND
 - 106 – ANAND PARAMESWARAN DIGITAL-FIRST BRANDS
-



Paru Minocha
MD, Qualitative & Lead,
Sustainability Practice,
South Asia, Insights
Division, Kantar

paru.minocha@kantar.com



Macneil Chowdhury
Director, Qualitative,
Insights Division,
Kantar

macneil.chowdhury@kantar.com

SUSTAINABILITY

IN AN ASPIRATIONAL ECONOMY

Our past leads the future

There is a growing sentiment that we cannot just consume our way into a more sustainable world. This is a quintessential paradox in an aspirational economy with a strong consumption appetite. Yet if we look deeper into the relationship between sustainability and the Indian consumer, it turns out that our past leads to the future! The heirloom ritual, reducing wastage, and recycling are all sustainability practices that are a part of our cultural DNA.

The sustainability imperative has been heightened by a pandemic that has forced us to ask fundamental questions. Uncertainty teaches us that sustainability stems from the need to survive. The sharp boundaries between the personal and community are blurring. Through uncertainty, sustainability emerges as a genuine source for a better life.

To emphasize their relevance, brand sustainability initiatives need to choose a positive frame of reference. In an aspirational economy, sustainability needs to be about more than reducing consumption – instead, it should be framed as a way to make more progressive choices.

Overcoming the ‘value-action gap’

Indian consumers, at par with many of their Asian counterparts, are actively engaging with sustainability.

- 77% are prepared to invest time and money in companies that try to do good
- 76% pay a lot of attention to environmental and societal issues in the news
- 74% believe buying sustainable products shows others who I am and what I believe in

Yet taking the right action is not always easy.

- 68% buy brand new things, not second-hand
- 65% throw recyclable waste in the trash or dustbin



Consumers’ desires for cost, comfort and convenience persistently undermine even the most well-intentioned sustainability initiatives. At the moment of truth, an overwhelming 84% of consumers prioritize saving money over saving the planet, and 72% forget about sustainability in the rush to purchase. Furthermore, the popular (and incorrect) notion of sustainability as simply ‘going without’ has fed a fear of ‘giving up’; Consumers are asking, “What’s in it for me, after sacrificing my aspirations?”

These conflicting impulses have led to a ‘value-action gap’ between consumers’ desire to be more sustainable, and their actual consumption behaviour. Going forward the ‘value-action gap’ that must be bridged.

Who leads and who follows?

Brands need to show consumers that sustainability is about what you gain, not what you give up. When 76% of Indian consumers say they “don’t have enough information to choose sustainable options,” brands must first and foremost *create* that knowledge of how to make better choices.

Then, to close the ‘value-action gap,’ brands must continue to deliver on classic marketing principles in the overall context of being responsible. Brands need to:

- Provide a clear benefit beyond ‘being sustainable’;
- Demonstrate the advantage of their product compared to current choices
- Create a belief in the consumer that their contribution enables real change

The role of the brand is to provide purpose: a reason for consumers to feel a strong connection with sustainability. The role of the product or service, in turn, is to give the consumer tangible reason to buy. The product must solve, and not just sell. Sustainability becomes an enabler to deliver this promise.

In this quest to boost sustainability in the market, brands often ask the question: Will the consumer pay a premium? The consumer is clear that while he or she will commit to making better choices, brands must pay for the solve. Consumers may change their behaviour, introduce recycling, and shun plastic. That’s on them. But brands must do their bit and take care of their own footprint. This is critical, as sustainability today may not be a hook, but it can be a sinker – that is, a point of rejection.

Philosopher Alain de Botton has written, “*If we could just address our deeper needs more directly, our materialism would be refined and restrained.*” If we look at brands like Patagonia for example, who design their products in such a way that they are intended to last a lifetime, they are environmentally sustainable of course. But they are also emotionally sustainable in the sense that they gently nudge us away from an anxiety inducing acquisition culture. Brands can and some are changing the world by serving consumer’s higher needs through meaningful consumption.



HOW CAN BRANDS NAVIGATE THE JOURNEY?

01

Lean into the culture of reuse and recycle; Highlight the intrinsic value of reducing wastage.

02

Create tangible value to nudge behaviour. For example:

- MAC’s ‘Back to MAC’; program that offers free products to consumers who return their empty containers.
- Hindustan Unilever (HUL) has piloted an in-store vending model called ‘Smart Fill’ at Mumbai’s Reliance Smart Acme Mall. Users are offered 30 rupees off the standard retail price if they use their own bottle to fill up on HUL products.

03

Identify where to play and broaden the brand narrative through the interlinkages of different kinds of sustainability efforts – as set out in the UN’s Sustainable Development Goals. This more holistic view of sustainability might encompass poverty alleviation and food security alongside climate action and gender equality, for instance.



Puneet Avasthi
Senior Executive
Director, Insights
Division, Kantar
puneet.avasthi@kantar.com

THE DIGITAL DIVIDEND: SPEARHEADING A BETTER TOMORROW

The last couple of decades have been marked by unprecedented and concurrent advancements in digital computing, data storage, and digital connectivity. This simultaneous enhancement of digital capabilities has unleashed a wave of innovations which have reshaped all spheres of our lives – economic *and* social.

The key manifestations of this digital society are ubiquitous mobile phone and internet reach. As per ICUBE (Kantar’s annual baseline study to track internet reach and usage habits), 78% of all adults in India today use a mobile phone, cutting across social classes and the urban-rural divide.

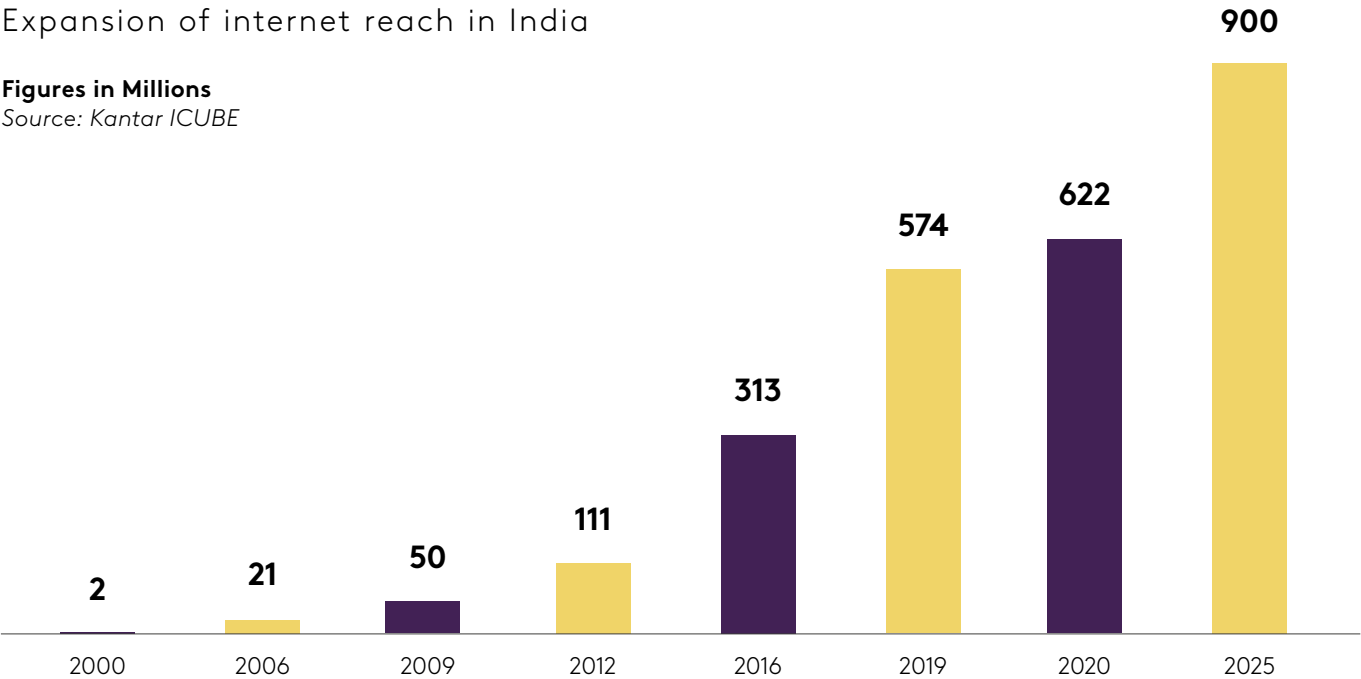
Further, the reach of the internet in India today covers over 600 Million individuals. This number is expected to further expand to a reach of around 900 million individuals by 2025, out of a national population of 1.4 billion.

This burgeoning digital eco-system has enabled easier inclusion of under-served and silent segments of the Indian society. This has had a tremendous social impact on parameters such as:

- entrepreneurship among women
- bridging of the urban-rural distribution divide
- digital financial inclusion of under-privileged sections of the society
- direct benefit transfer to the under-privileged

Expansion of internet reach in India

Figures in Millions
Source: Kantar ICUBE



The COVID-19 pandemic has further reinforced the enormous value of India's digital economy. With lockdowns came a range of digital services that allowed consumers to stay at home and maintain social distancing while continuing to effectively manage their household and commercial needs.

The open internet around us has consistently enabled innovations to better serve the most recent converts to the digital revolution. Over the next few years, the market should continue to introduce service innovations that will bring greater efficiencies and joy to the lives of millions of rural citizens, and to women throughout India.

In order to be relevant with the new constituencies of the internet in India, it will be critical for innovators to focus on 3C drivers of internet adoption :

- **Communication** – Vernacular and Voice
- **Commerce** – Payments, Shopping, and Services
- **Content** – Video, Audio, Image, and Text

The biggest digital success story of the last five years is the financial inclusion fostered by digital platforms in India. Over the last year alone, India's digital payment user base has grown some 29%. As per ICUBE 2020, there are now around 287 million digital payment users in India, with one out of every five active internet user Indians having carried out a cashless transaction in the past year. The pandemic fast-tracked the adoption of digital payments in India as people increasingly sought safer, convenient, and contact-free payment methods.

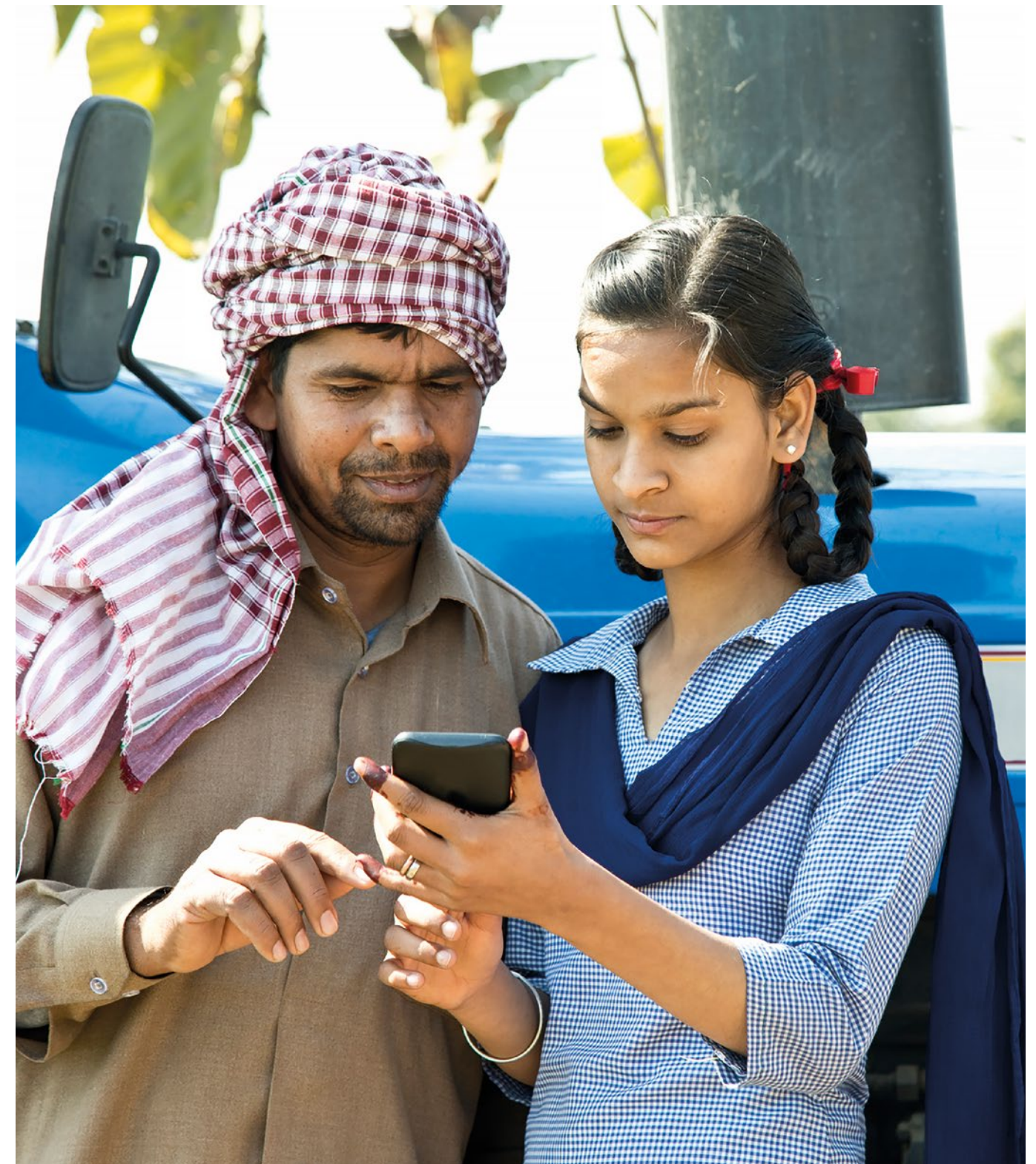
India's Unified Payments Interface (UPI) and e-Wallet services have truly democratised digital payment by taking it beyond the country's top nine cities. More than half of e-Wallet users are from small towns and rural areas. UPI and e-Wallet services have truly enabled greater financial inclusion nationwide, with the help of just a smartphone and internet access. This has provided a huge opportunity for ecommerce and online service providers to accelerate their businesses beyond the country's urban centres.

While services such as ecommerce, search, and social are well established and need no explanation, the quantum growth in online education and online medicine is remarkable. These online ecosystems have brought access to better-quality resources to people living in the hinterland.

We estimate that over 65 million Indians used the internet for education services in the past year, with the largest number of users of online education living in the economically weaker state of Uttar Pradesh. Furthermore, we estimate that approximately a quarter of internet users used their digital devices to access medical services in 2020.

Over the next five years, the hybrid lifestyle enabled by the digital ecosystem will further deepen, with truly mass reach of connected devices, including myriad sensors for equipment in the kitchen and wash rooms. New smart appliances and wearables will allow Indians to carefully calibrate their days, health and nutrition needs. Immersive experiences created by virtual reality and augmented reality platforms, backed by powerful artificial intelligence engines, will make it easier for us to explore shopping choices. These tools will allow people to find the best fit for their individual tastes and requirements, all without expending much energy.

With IOT-powered smart digital ecosystems already on the anvil, the coming decade will usher in a new wave of innovations, creating healthier and happier consumers in the years to come.





Anand Parameswaran
Executive Director,
Quantitative,
Insights Division, Kantar
anand.parameswaran@kantar.com

DIGITAL-FIRST BRANDS CREATING CONSUMER BONDS VIRTUALLY

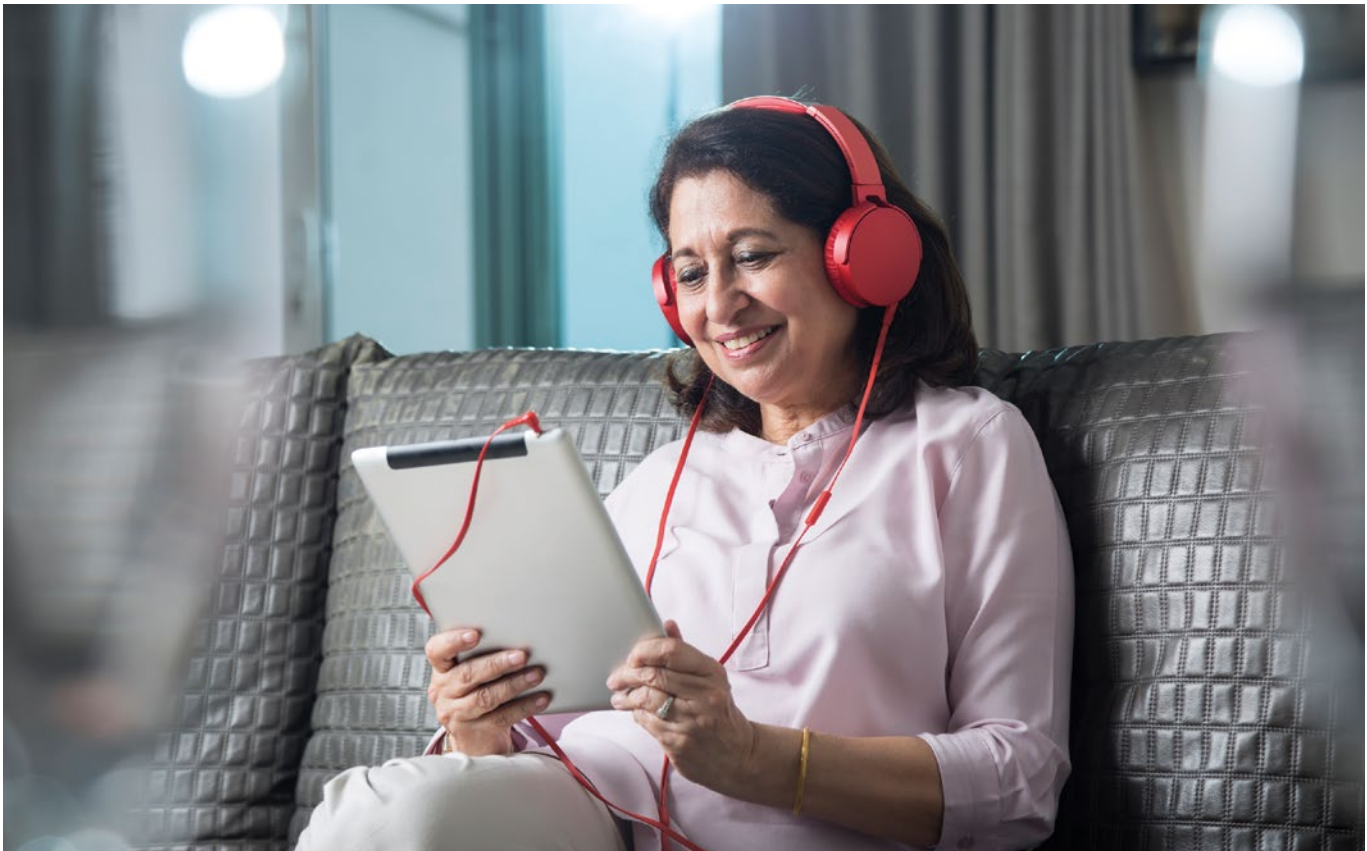
Amid global stay-at-home orders, kids switching to virtual- and home-schooling, and restrictions on indoor gatherings, the world was flipped upside-down in 2020. And these changes have persisted well into 2021.

In the world of branded business, the pandemic accentuated certain existing trends that were already emerging in the BrandZ™ data worldwide – but now have accelerated even faster.

Many of these changes have altered the balance – and blurred the lines – between digital-first and ‘traditional’ businesses. Consumers in the past have always associated Trust and Affinity with traditional brands: in other words, those brands that have a decades-long legacy and have been a part of people’s lives for many years.

In 2018, digital first brands had an average index score of 100 on Trust and 104 on Brand Affinity. In 2021 these index scores on Trust and Affinity have increased quite a lot and are at par with the other sectors where we have legacy brands.

It is imperative to understand why this shift in scoring has taken place - and the evolving consumer mindset that has driven it.



Lifeline in trying times

During the pandemic, digital-first brands became the first port of call when people were running out of essentials – and also when people wanted to order that new smartphone for their loved ones. The pandemic has accelerated the adoption of ecommerce among consumers, and made them more open towards digital brands in general. By becoming people's lifeline in trying times, brands have gained market share in a very classic way: by helping to fulfil the needs of a wide consumer base.

Purpose at the heart

BrandZ™ data shows that Brand Purpose has become even more central and more important to consumers in India than is the case globally. One of the aspects that drives Purpose here is a brand's expanded range of products. And in this regard, digital-first brands have a massive advantage. They are less restricted by shelf space and can 'display' items more dynamically than in a store. Consumers have never been so spoilt for choice. "*Aur Dikhao*" ("Show me more") is no longer just an advertising campaign, but the core of how digital-first brands are trying to satisfy customer needs by providing a wide range of options.

Trust – moving the mountain

There are three positive primary emotions—anticipation, joy, and trust—that are key to developing lasting connections. Consumers want to believe in the brands they use, and hence trust takes priority. Trust is a difficult metric to move, but it certainly drives growth for a brand: as a metric, BrandZ™ finds that Trust is highly correlated with brand preference and equity. Trust is a useful summary response that often shortcuts rational thinking – and this year, digital-brands have shown the power of trust to turbocharge growth. Because these digital brands have managed to build strong credibility and trust with their consumer bases, they have been able move seamlessly into other categories. Think, for instance, of Amazon's recent move into financial services; or Flipkart introducing new categories like Groceries; or Ola introducing electric scooters. None of these expansions would have been possible without trust.

Power of human connections

By improving the human connection in an increasingly digital world, brands have strengthened the emotional connection they have with their customers. A positive connection that customers experience with brands stays with them and increases loyalty and engagement. Because of the digital nature of the internet, brands are turning to AI and machine learning to craft a more human experience for their customers through AI chatbots, real-time decisioning and personalisation engines. Chat features on brands' websites, portals, and app have increased greatly over the past year – and the response, ultimately, has been a faster and more effective customer service experience.

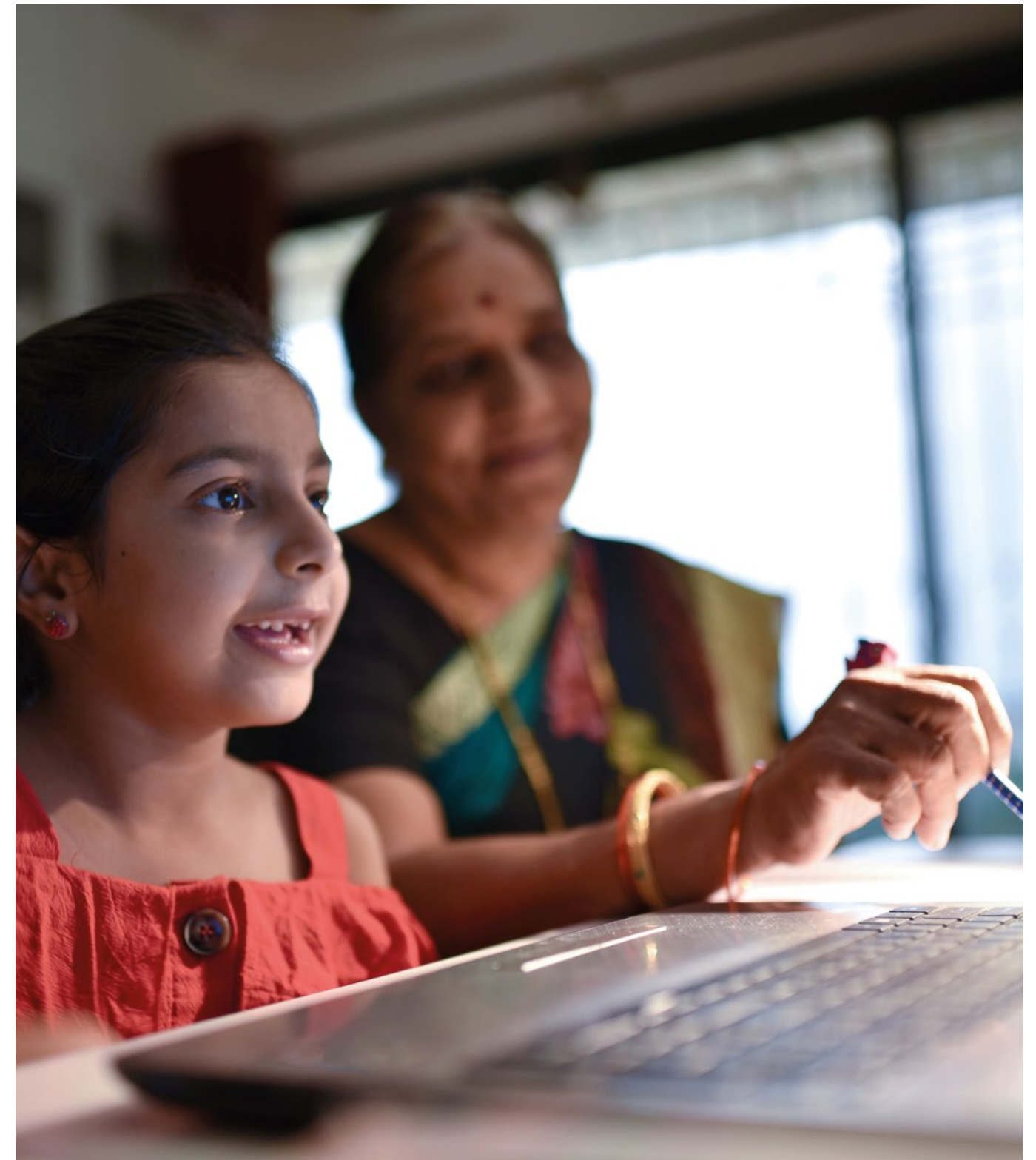
In the age of digital transformation, the way we understand customers has been revolutionised by technology – which, when used correctly, can actually help brands to connect with people on a deeper, more emotional level.

Experience: Less brick and more click

Kantar CX+ surveys show that only one-third of Indians feel that the brands they use put consumers' needs and expectations first. Big brands individually used to compete on product, price and promotions. But today, digital brands seem to have taken these functional dimensions off the table – while also driving customer engagement with fresh approaches to solving real-time consumer needs.

Think about new forms of personalisation based past purchasing history; or well-calibrated sales notifications beings sent based on your profile and communications history. It's customisation geared toward giving the consumer a perceptible feeling that things are being done *their* way. Simply put, digital-first brands have managed to create an experience that makes the consumer feel taken care of.

The most successful digital-first brands have managed to create an emotional bond with consumers and have become a part of their everyday lives. But this, of course, must be an ongoing effort for digital and traditional brands of all types – because as modern lives continue to change, so too will the ways that brands can best make a difference in those lives. Therein lies the challenge and the opportunity.



**KANTAR
RESOURCES**

- 112 – KANTAR BRANDZ INDIA 2021
METHODOLOGY
 - 122 – REPORTS & PUBLICATIONS
 - 124 – PERSPECTIVES REPORTS
 - 126 – OUR BRAND EXPERTS
 - 130 – KANTAR BRANDZ TEAM
 - 136 – ABOUT US/CONTACT US
-

KANTAR BRANDZ INDIA 2021 METHODOLOGY

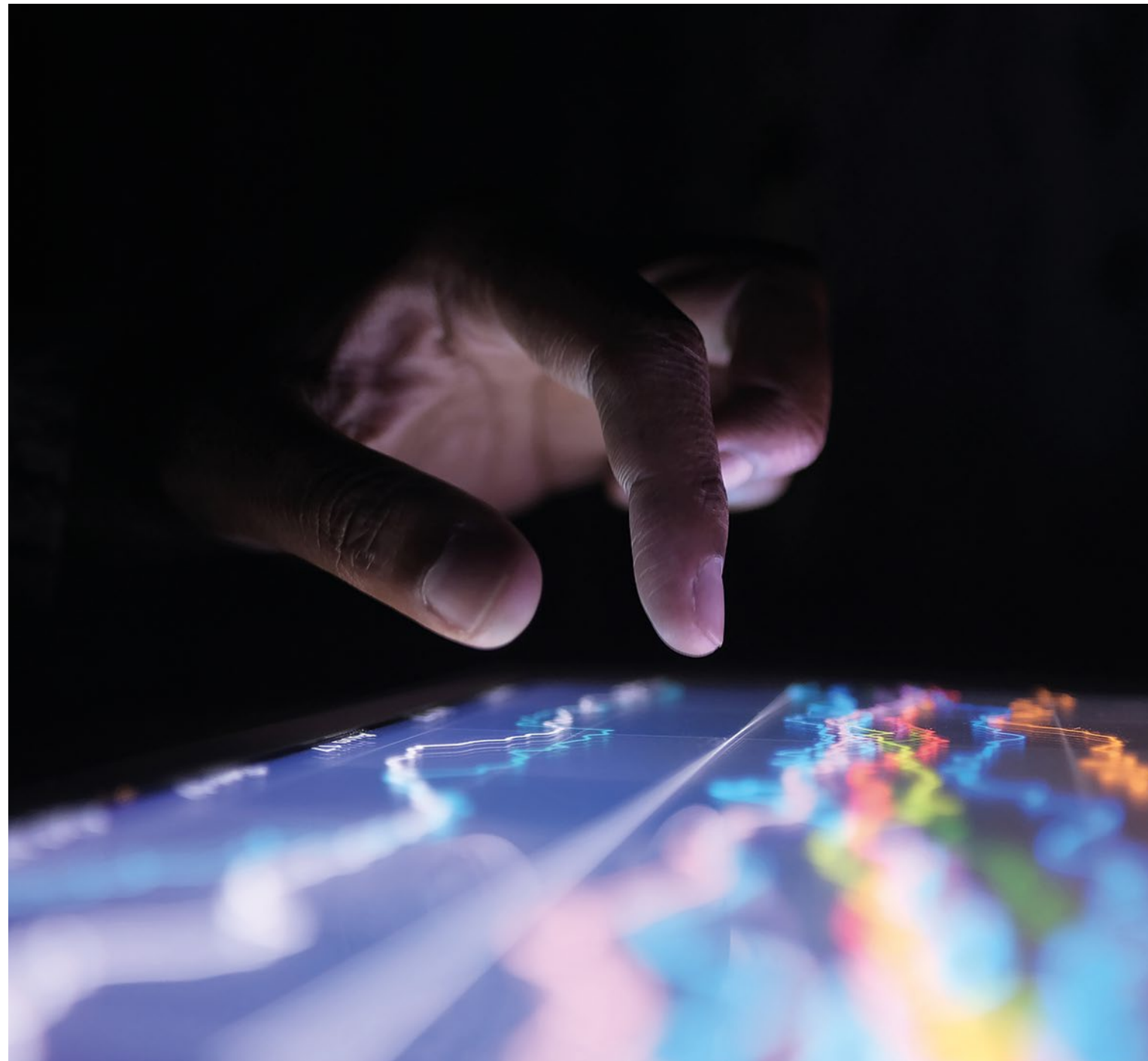
This report includes insights and analysis of India's most purposeful brands.

To arrive at this year's Most Purposeful Brands of India, we analyzed the Kantar BrandZ™ database from 2020-21 covering 418 Brand cases for this project. In each case we had brand perception and brand equity metrics for brands across 30 categories – sourced from a total of over 12,000 consumers. The database includes 28 consistent attributes. A two-stage analysis process was then used to arrive at the decision to centre 'Purpose' in this year's report.

Factor analysis, which grouped 28 perceptual attributes into 18 factors or 'brand image pillars' – one of which is Purpose.

Brand structures analysis (BSA), which quantified how the interaction of brand perceptions created success for brands in the past - and identified the perceptions that will create success in the future to guide brand positioning decisions and actions.

The Brand Structures Analysis produced a model with a highly involved set of significant relationships between various brand image pillars, all connecting to BrandZ's three core, proven drivers of brand value: Meaningful, Different, Salient. **From this analysis, Brand Purpose emerged as the key differentiator for brand value in India.**



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. Kantar 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:

Meaningful

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

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.

THE WORLD'S LEADING DATA, INSIGHTS AND CONSULTING COMPANY

**We help clients understand people and
inspire growth.**

We have a complete, unique and rounded understanding of people around the world; how they think, feel and act; globally and locally in over 90 markets.

Our validated insights, evidence and advice are proven to drive growth and are at the heart of our clients' decisions.

We don't just help clients understand what's happened, we tell them why, and how they can shape the future.

To find out more about Kantar, please visit:
www.kantar.com



THE KANTAR SUSTAINABLE TRANSFORMATION PRACTICE

The world is at an inflection point; at the heart of these challenges is a need to understand people

"We are dedicated to leveraging our expertise in human understanding to identify how to translate values and purpose into meaningful action"

Jonathan Hall, Managing Partner
Kantar Sustainable Transformation Practice

Environmental and social challenges dominate the news, and consumer and employee activism are the new normal. In response, the financial community is demanding action to de-risk business models. These changing values and expectations create risk for both private and public organisations. Formulating forward-looking sustainable development strategies can help enterprises effectively prevent and manage risks.

The Kantar Sustainable Transformation Practice brings together expertise and tools from across Kantar to support organisations – both commercial and public – to better understand people and empower them in the definition, activation and measurement of their impactful sustainability strategies. Kantar has a diverse portfolio of research in this space, helping brands and organisations in China develop human-centric transformation programmes.

To find out more about the Kantar Sustainable Transformation Practice and how it could support your organisation, please visit:
www.kantar.com/expertise/sustainability

Contact Paru Minocha: paru.minocha@kantar.com



MAKE BETTER, FASTER BRAND DECISIONS TO WIN THE BATTLE FOR MARKET SHARE

Get ahead of your competition, using an agile brand guidance system that gives you the crucial insights you need, when you need them. Understand your current brand performance, and use leading-edge analytics to simulate where it is heading. Contact your local Kantar team to find out how you can:

- 1 Optimise and justify marketing investments
- 2 Strengthen your brand equity and sales conversion
- 3 Grow your brand now and in the future

Kantar's brand guidance systems
kantar.com/campaigns/brand-tracking/home

Contact Evenet Singh: evenet.singh@kantar.com

SUPERCARGE BRAND GROWTH WITH FASTER INSIGHTS

Kantar Marketplace is a market research platform that accelerates consumer understanding through a combination of agile research products, powerful analytics and deep brand-building expertise.

Whether you're working on a campaign or a new product innovation, Kantar Marketplace has a solution to deliver the fast-track insights you need. Kantar Marketplace's suite of survey products, reports and data includes exclusive insights from Kantar BrandZ™, the world's largest brand equity platform.

Kantar BrandZ Reports

Understand the evolving influence of key drivers of business success and your brand's performance versus competitors in this series of reports on:

- **Brand Purpose**
- **Corporate Reputation**
- **Consumer Trust**
- **Brand Equity**

Kantar BrandZ Data

Explore brand performance data: brand equity, corporate reputation and brand personality, across a range of categories, markets and time periods.

Contact BrandZ.Marketplace@kantar.com

kantar.com/marketplace

GOING GLOBAL?

WE WROTE THE BOOK.

Kantar BrandZ: The Ultimate Resource for Brand Knowledge and Insight

Our Kantar BrandZ country reports contain unparalleled market knowledge, insights, and though leadership about the world’s most exciting markets. You’ll find, in one place, the wisdom of Kantar’s brand-building experts from all regions, plus the unique consumer insights derived from our proprietary Kantar BrandZ database.

If you’re planning to expand internationally, Kantar BrandZ country reports are as essential as a passport.

REPORTS

- Kantar BrandZ
Most Valuable Global Brands
- Kantar BrandZ
Most Valuable Global Retail Brands
- Kantar BrandZ
Most Valuable Australian Brands
- Kantar BrandZ
Most Valuable Canadian Brands
- Kantar BrandZ
Most Valuable Chinese Brands
- Kantar BrandZ
Chinese Global Brand Builders
In association with Google
- Kantar BrandZ
Most Valuable Emirati and Saudi Brands
- Kantar BrandZ
Most Valuable French Brands
- Kantar BrandZ
Most Valuable German Brands
- Kantar BrandZ
Most Valuable Indian Brands
- Kantar BrandZ
Most Valuable Indonesian Brands
- Kantar BrandZ
Most Valuable Italian Brands
- Kantar BrandZ
Most Valuable Latin American Brands
- Kantar BrandZ
Most Valuable Netherlands Brands
- Kantar BrandZ
Most Valuable Japanese Brands
- Kantar BrandZ
Most Valuable South African Brands
- Kantar BrandZ
Most Valuable Spanish Brands
- Kantar BrandZ
Most Valuable UK Brands
- Kantar BrandZ
Most Valuable US Brands
- Kantar BrandZ Insights
US Retail
- Kantar BrandZ Insights
US FMCG
- Kantar BrandZ Insights
US Banks
- Kantar BrandZ Insights
US Business Solutions & Technology
- Kantar BrandZ Insights
US Media & Entertainment
- Kantar BrandZ Spotlight
Belgian Brands
- Kantar BrandZ Spotlight
Canadian Brands
- Kantar BrandZ Spotlight
Emirati & Saudi Brands
- Kantar BrandZ Spotlight
Brands in India

KANTAR BRANDZ PERSPECTIVES

Building Brand Equity: Our latest Kantar BrandZ tools to diagnose brand strengths and weaknesses

Based on unique insights derived from our proprietary Kantar BrandZ database, we have created an ever-expanding library of tools for building and sustaining valuable brands. These tools are only available through Kantar.

BRAND PERSONALITY

Based on unique insights derived from our proprietary Kantar BrandZ database, we have created an ever-expanding library of tools for building and sustaining valuable brands. These tools are only available through Kantar.

BRAND PURPOSE

Learn how a brand can be more than a profitable asset. Understand why your brand exists beyond profit, and your role in consumers' lives.

CONSUMER TRUST

This report allows you to take a deep dive into brand integrity, summarising and diagnosing your brand's trust credentials.

CORPORATE REPUTATION

Gain an invaluable insight into your brands' corporate reputation. Find out why it matters, and how you can influence it, using the latest analysis.

PREMIUM

Strategic pricing to increase your brand's profitability; compares pricing and perception to identify your potential risk or opportunity.

COVID-19 BAROMETER INDIA

As India grapples with the second wave of the pandemic, consumer reaction and adaptations in the wake of COVID-19 continue to evolve.

Kantar's COVID-19 Barometer India, the leading syndicated study on the topic, has mapped how people are feeling and acting around the world since the start of the pandemic. It has helped marketers understand the implications of these changes for their brand and the marketing levers they need to pull to influence consumers.

Latest findings from Kantar's COVID-19 Barometer India show that Indians are those feeling the most concerned about the current situation in the world.

The report provides an in-depth understanding around how Indians are coping with the pandemic, and explores how 2021 could play out. It also shares insights to help you better anticipate consumer needs and growth areas.

The study unpacks some key business questions that marketers are facing:

- How are people feeling?
- How are people behaving?
- What is the future outlook?
- What are the expectations from brands?
- And more.

Contact Soumya Mohanty: soumya.mohanty@kantar.com

www.kantar.com/campaigns/covid-19-barometer

BRAND EXPERTS

WHO CONTRIBUTED IDEAS, RESEARCH, THOUGHT LEADERSHIP AND INSIGHTS TO THE REPORT



Puneet Avasthi
Senior Executive Director,
Specialist Businesses, Insights Division,
Kantar



Macneil Chowdhury
Director, Qualitative, Insights Division,
Kantar



Paru Minocha
Managing Director, Qualitative and
Lead, Sustainability Practice, South Asia,
Insights Division, Kantar



Soumya Mohanty
Managing Director, Clients and
Quantitative, Insights Division, Kantar



Anand Parameswaran
Executive Director, Quantitative,
Insights Division, Kantar



K. Ramakrishnan
Managing Director, South Asia,
Worldpanel Division, Kantar



Deepender Rana
Executive Managing Director, South Asia,
Insights Division, Kantar



Preeti Reddy
Chairwoman, South Asia,
Insights Division, Kantar

RURAL BAROMETER INDIA

A semi-annual survey jointly undertaken by Kantar and GroupM Dialogue Factory that explores rural India’s concern about the impact of the second wave and how it alters consumer behavior and purchase patterns.

The report findings are based on a sample of 3,855 rural adults (18+ year old’s) surveyed across 18 Indian states with representations across gender, NCCS and age groups. All Socio-cultural regions (SCRs) are covered within each state to meaningfully reflect the variability that exists. In 2021, the migrants who had returned to their villages were also covered in the study.

Contact Puneet Avasthi: puneet.avasthi@kantar.com

MOBILITY FUTURES

We help clients understand people and inspire growth.

We have a complete, unique and rounded understanding of people around the world; how they think, feel and act; globally and locally in over 90 markets.

Our validated insights, evidence and advice are proven to drive growth and are at the heart of our clients' decisions.

We don't just help clients understand what's happened, we tell them why, and how they can shape the future.

20,000+
interviews

53
expert
perspectives

31
cities

1
forward-facing
study

To find out more, contact mobilityfutures@kantar.com

www.kantar.com/campaigns/mobility-and-covid-19



THE KANTAR BRANDZ INDIA TEAM

These individuals created the report, providing research, valuations, analysis and insight, editorial, photography, production, design, marketing and communications.



Nikhil Banga

Nikhil is a Senior Manager in Valuations for Kantar BrandZ. He looks after brand valuation projects in Kantar BrandZ for various countries.



Chhavi Bhargava

Chhavi is the CMO South Asia, Kantar with 27 years experience in Kantar. She leads the marketing initiatives for all the activities and campaigns in South Asia.



Halina Bromberg

Halina is the Kantar BrandZ Marketing Director, Insights Division, where she is responsible for the PR, marketing and communications on the Kantar BrandZ projects.



Martin Guerrieria

Martin is Director for Kantar BrandZ Research. He is involved in delivering the full suite of Kantar BrandZ research tools.



Sana Hussain

Sana is Account Director at Insights Division - Kantar. She has been with Kantar for last 9 years servicing clients in the space of brand and communication and also manages BrandZ in India.



Soumya Mohanty

Soumya is Managing Director, Clients and Quantitative, Insights Division, Kantar. She has been with Kantar for last 8 years and has worked in Insights industry for close to three decades. She is partnered many companies in brand building and currently is responsible for driving client engagement for Kantar across all domains.



Anand Parmeswaran

Anand is the Executive Director at Insights Division - Kantar and also leads the BFSI Practice in India. He is a part of the core WPP BrandZ committee for India and oversees the BrandZ India client outreach and relations. He has spent 20 years in market research across agencies and clients with a specific focus on Non-FMCG practice.



Deepender Rana

Deepender Rana is Kantar's Executive Managing Director, South Asia, Insights Division. He started his Kantar career in Bangalore in 1994, and has worked across many roles to launch and grow Kantar's China, South Korea, and Philippines businesses. Most recently, he was CEO for Insights in Greater China from 2016-2020.

THE KANTAR BRANDZ INDIA TEAM

With special thanks and appreciation to:

Neha Ahluwalia, Hashim Badani, Richard Ballard, Mark Breen, Tuhin Dasgupta, Bethan Davies, Kimberley Jane Fitzsimmons, Ravindra Kale, Hiten Mahajan, Hemlata Mamgain, Anthony Marris, Cecilie Østergren, Ashutosh Popli, Simran Rainu, Paul Reiffer, Saurabh, Vinay Sharma, Ravneet Singh, Hiten Thaker and Anju Yadav



Preeti Reddy

Preeti is the Chairwoman, South Asia, Insights Division at Kantar. She is part of the core WPP BrandZ Committee and provides guidance and thought leadership to the overall BrandZ India effort.



Amanjit Singh

Amanjit is the Senior Director, Marketing, South Asia at Kantar. He comes with over 10 years of qualitative research and marketing experience. He leads the BrandZ India launch event and also oversees it's communications, PR and social media outreach.



Graham Staplehurst

Graham is Director, for Kantar BrandZ Thought Leadership. He has over 30 years research experience in Kantar, specializing in brand & communications strategy. Graham looks after Strategy on Kantar BrandZ.



Nimai Swain

Nimai is Executive Vice President with Insights Division, Kantar. He manages BrandZ research and analysis in India. He is a seasoned market researcher with over 25 years of experience and comprehensive exposure in brand, communication and stakeholder loyalty research.



Raam Tarat

Raam is the Global Projects Director for Kantar BrandZ. He leads the production of the Kantar BrandZ country reports, as well as marketing communications for other projects.



David Walter

D.C. Walter is a writer, journalist, and editor based in New York, and oversaw the insights discussions, writing and editing of the Kantar BrandZ Spotlight India 2021 report.



Doreen Wang

Doreen is President of Kantar, Greater China, and the Global Chair of Kantar BrandZ. A seasoned executive, she has over 20 years' experience providing outstanding market research and strategic consulting for senior executives in Fortune 500 companies in both the US and China.

EXTRACT MEANINGFUL INSIGHTS TO GUIDE BRAND GROWTH BY ADVANCED ANALYTICS ON THE DATA SETS FROM MULTIPLE SOURCES

In an age of unparalleled data proliferation, brand owners and marketers struggle to manage the vast range and volume of data sets and extract meaningful insights.

Kantar analytics cut through the multiple data sets to unlock insights for fueling growth. 1,500+ professionals of data analytics, data science, technology and consulting professionals globally.

The convergence of unique human understanding and business expertise, coupled with innovative data and technology solutions, allows us to better predict consumer behaviour, providing brand owners and marketers the confidence to make bold and complex decisions and optimise priorities for growth.

Kantar's Analytics creates leading-edge offers focused on

- Brand and Marketing ROI
- Brand Strategy and Innovation
- Content Analytics
- Data Strategy and Engineering, and
- Customer Analytics

Contact: AnalyticsGC@kantar.com

Kantar.com/analytics

KANTAR IN INDIA

Kantar is the world’s leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients **understand people** and **inspire growth**.

To learn more about how to obtain valuable insights applicable to all business areas, please contact:



Deepender Rana
Executive Managing
Director, South Asia,
Insights Division, Kantar
deepender.rana@kantar.com



Soumya Mohanty
Managing Director,
Clients and Quantitative,
Insights Division, Kantar
soumya.mohanty@kantar.com



Chhavi Bhargava
Chief Marketing Officer,
South Asia, Kantar
chhavi.bhargava@kantar.com

For the latest news and studies from the Kantar network visit:
www.kantar.com

FOLLOW US



SYNDICATED SOLUTIONS

NEW INDIAN CONSUMER SURVEY

Contours of the consumer market have changed phenomenally in the last year and a half. There is a need to revisit our understanding of the urban Indian consumer. Kantar is proud to present **The New Indian Consumer Survey**- a consumer encyclopedia of the pre-COVID and post COVID India. This report covers over 10,000 urban Indians across NCCS in 15 key states of the country. It includes insights on attitudes & lifestyle, category & brand usage, demographics, shopping, entertainment & media habits and can help you leverage them to make better & informed marketing decisions for your brand.

ICUBE

Established in 1998, ICUBE is an industry standard and one of its kind report that helps you measure reach and frequency of internet and digital usage amongst all Indians. It is India's digital currency, quoted across multiple industry publications.

eMARKETPULSE

eMarketpulse is a comprehensive report that provides online shopping behavioral insights. The report covers a total of 20,000 internet users in 80+ locations across affluent class to help understand the transactional behavior of online shoppers in India.

ITOPS

Kantar ITOPS 2020: ITOPS is an annual syndicated study by Kantar that covers 7000+ MSMEs across 35 cities in India every year. The study was launched in 1996 and is the largest demand side study for Indian technology market. The study covers various areas such as business landscape, hardware and software adoption and digital landscape. With ITOPS 2020 edition, it completes a landmark of 25 years. In its 2021 edition, there is an increase in the scope and coverage of the product further by covering 10,000 businesses across 45 urban locations of the country.

KIDSCAN

Kids represent an important demographic to marketers because they have their purchasing power, they influence their parents' buying decisions and they are the adult consumers of the future.

Parents today are willing to buy more for their kids because trends such as smaller family sizes, dual incomes, and postponing children until later in life mean that families have more disposable income. Thus, it makes it imperative for marketers to understand the mindshare of the potential market. Kantar's Kidscan research covers a sample of 4000+ children between 8 to 16 years of age across the country to get 360-degree insights into the psyche and brand interaction of new generation kids.

For further details, please contact: puneet.avasthi@kantar.com

DISCOVER CELEBRITY IMPACT IN REAL TIME

CelebrityZ is an evaluation system to understand celebrity characters and celebrity influence on brand building which reflects public value propositions through celebrity preference.

Combining survey data and social index, CelebrityZ can be real time barometer to show celebrities' influence.

Kantar CelebrityZ Reports

Monthly ranking of celebrities exhibit the latest public interesting and focus on:

- Top 10 ranking each month
- Knowledge from current preference

Kantar CelebrityZ Data

Explore celebrity performance data: celebrity influence score contributed by salience, meaningful and difference, can be viewed by deep profiling; sentiment; celebrity personality

For further details, contact Anand Parameswaran: anand.parameswaran@kantar.com

KANTAR BRANDZ

2021 SPOTLIGHT
BRANDS IN INDIA

Author: **David Walter**
Producer: **Amanjit Singh**
Designer: **Hiten Thaker**

kantar.com/brandz
