CHAPTER 4.

INTRODUCTION TO BRAND AND PRODUCT CATEGORY
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4.1 Scheme of Chapter:
The study focuses on content analysis of commercials of ten brands over a period of last ten years within the context of changes in the marketing environment post liberalization. This chapter lays the foundation for the study as the spotlight of this chapter is on the ten brands. An introduction to the brands, rational for selection, product category and marketing environment context would be discussed here.
4.2 RASNA AND THE SOFT DRINK BEVERAGE CATEGORY:

Soft drinks is perhaps the most hard fought product categories in India in every respect - media, events, distribution, pricing, communication, endorsements and so on... Every year it consistently emerges as one of the top 10 categories on television.\(^{42}\) Pioma Industries Limited may not be known to many but everyone across all age groups know the brand “Rasna” and its punch line “I Love You – Rasna”. Grabbing the opportunity of policy changes in the 70s, and “distrust” mindset of Indian housewives for ready to eat foods, Pioma launched an Soft Drink Concentrate under the brand name 'Jaffe' in 1976 which was changed to Rasna in 1979 (ICMR\(^{43}\), 2002). Rasna was launched on a platform, which offered both taste and economy and it opened up a product category called soft drink concentrate (Mudra, 2002). The use of ‘the child’ as an endorser and influencing brand decisions was recognized for the first time and it helped in breaking through the clutter (Mudra, 2002). As the product format was new to the country, the advertising took the consumer through various educative phases: ease of preparation led the way followed by the delineation of the various occasions for usage and during this process the ‘32 glass’ promise became a strong element along with the extremely catchy jingle ‘Ras ki rachna Rasna’ (Mudra, 2002).

Slowly new flavours were added to the brand basket at a price premium along with the economy and in advertising, the chief brand endorser - the Rasna girl, had a little companion - the Rasna boy, which added excitement and gave choice to the consumers (Mudra, 2002). In keeping with the target audience’s constant craving for excitement, the brand began its long association with promotions during this early phase itself. In 1989- the Spiderman Promotion was followed by the He-Man Comic Promotion in 1992 and all these efforts resulted in a whopping 81 percent in 1986 from an 11 percent share of the Dilutables category in 1982 and domination over squashes and syrups that had earlier led the category (Mudra, 2002).

1991 saw the launch of Pepsi (Coca Cola followed in 1993) and the aerated soft drinks increased salience dramatically as the colas came with aggressive, high volume


\(^{43}\) Centre for Management Research
communication with film stars and cricket heroes (Mudra, 2002). But in-home consumption of colas hadn’t yet taken off and Rasna still reigned supreme in this segment with a 35% share-of-throat compared to the 11% of aerated soft drinks (Mudra, 2002).

Rasna always sought to remain top-of-mind for its main target audience. So promotions and fads were always the flavour of the day. The ‘Spiderman’ promotion remains one of the brand’s more successful promos. The advertising circled around the same themes – Rasna for any occasion, any season, any reason and at the most value that you could get for your money (Mudra, 2002). The phase after 1993 was significant because it was replete with a flurry of promotional activities, brand mascots and new flavour launches. In 1994 the Rasna Genie (to coincide with the Hollywood blockbuster (Aladdin) made his appearance which was followed by the 1996 Rasna Dino (a take-off on Jurassic Park) and in 1997 the search for the next Rasna boy and girl became an event in itself, drumming up considerable levels of excitement all over the country as young hopefuls lined up for this coveted honour (Mudra, 2002). Chota pack and Maha Value pack targeted the segment that preferred value for money.

Aerated soft drinks were not much of a threat to the market share of Rasna as their consumption was largely restricted to out-of-home occasions. The turning point was the introduction of 1.5 litre PET bottles by the cola majors in 1997. With this the colas entered the in-home segment. Simultaneously, glamorous advertising and introduction of various low ticket price pack sizes diluted the perception of colas being expensive and reached to the kids and higher SECs due to the excitement, up market imagery and ready to drink property (Mudra, 2002). All this resulted in a lot of change. Not only competition but Rasna’s target audiences were also undergoing drastic changes which raised benchmarks and demanded a product and brand image change in Rasna. Research indicated that the housewife, Rasna’s consumer, herself was changing and she had evolved into a modern, fun-loving, person, making choices for herself (Mudra, 2002). The idea of the aspirational child too had changed and from a chubby-faced, cute toddler to an intelligent, mischievous, energetic and naughty child, of a slightly older age group (Mudra, 2002).
Rasna underwent a dramatic product change. The ‘new improved Rasna’ was reflected right from a totally changed packaging, to a change in the advertising’s look as well. The traditional ‘cute’ kid was replaced with the ‘smart’ kid and the Mother also went in for a similar attitude change. The unique sales promotion - ‘Prankies’ was devised to harness the child’s pester power for the brand it would also work as a catalyst in spreading the new persona of the Rasna kid. The Brand Equity Survey of India’s Most Trusted Brands (conducted by ORG-MARG) 2001 ranked Rasna as the 21st Most Trusted Brand in India and No. 7 in the Food & Beverage Category. While Rasna was able to hold on to its household franchise during this time, growth was proving to be an uphill task. While the dual format (of powder and liquid) continued to be Rasna’s mainstay, the consumer was increasingly offered more convenient formats. The Dilutables category driven almost single-handedly by Rasna was also being considered by other soft drink majors, attracted mainly by its low ticket price that would help drive penetration into smaller markets (Mudra, 2002).

With the changing lifestyle and increased awareness and health concerns; consumers were switching over to more healthy drinks over carbonated soft drinks. As a result, the growth in non-carbonated soft drink category was higher than the aerated cold drinks in recent years. There was an inherent need in the mind on Indian consumers for a healthy drink and they could easily switch over to a healthier substitute, if available widely. In order to reinvent the brand, ‘Relish a gain’ became the brand slogan and positioned the brand as a natural and healthy drink. The dual format product was upgraded and new formats – powder and liquid were developed at different price points under the Rasna umbrella brand- Powder (Rozana Fruit Booster & Rozana Amrit), Liquid (Rozana Ras) & Dual (Utsav). This new avatar was unveiled in the summer of 2002 and the Rasna saga continues with Rasna holding 93 percent market share in India and about 82% of the in-house consumption of soft-drink market, making it a big force to reckon with (Source: www.rasnainternational.com).

The rational for choosing “Rasna” is that the brand has been a trend setter in terms of using a kid as a protagonist in ads and the communication has seen lot of adaptations due to volatile market conditions post liberalization.

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44 Retrieved from http://www.etfoodprocessing.com/Feb_March07/Beverages.htm the internet version of times food processing journal as on 12th December 2007
4.3 MOOV AND THE RUBEFACIENT CATEGORY

The Indian over-the-counter (OTC) drug market, estimated to be worth approximately Rs 2,800 crore in 2004, has been growing at 15-20 per cent for the last three years. This growth, according to industry sources, is the result of an increase in self-medication (Shukla, 2005). The Rs. 200 crore Paras Pharmaceutical describes its three-pronged strategy as "identify, capitalize and grow". And though none of its brands can be bracketed in the mass-market classification, Paras' portfolio is easily the envy of any pharma company. Take a look at its quiver. Brands like Itch Guard, Ring Guard, Krack, Livon and Numis were created in quick succession and are, today, generic to their respective categories. On the other hand, there are strong challenger brands such as Moov, Dermi Cool and EoroSoft which have kept the leaders in the respective categories on their toes (Shukla, 2005).

The rubefacient category in India was stagnant and lodex, an 80 year old general purpose brand used for all types of pain and aches dominated the market. In addition to the market leader there were brands like Amrutanjan and Zandu which enjoyed a strong regional presence. Paras Pharmaceuticals launched Moov in 1986 as a joint pain reliever and was targeted at the old and chronic sufferers. But very soon the brand was re-launched as the position of joint pain reliever was proving to be restrictive. Research done by the company revealed that all body aches were back specific, women were the most vulnerable target of back aches and they were the ones who ignored their pain and never took any treatment. Thus, Moov was repositioned in the market as a backache specialist and communication targeted the lady of the house. Ads directly talked to the housewife and the story of the ad revolved around the women to women recommendation route. In order to differentiate, early Moov ads harped on the fact that the cream was white in colour, stain-free and attractively packed which was a direct blow on the then market leader, lodex. The other subtle but strongest point of differentiation was the fact that all other competing brands were multi-purpose while Moov was positioned only as a backache reliever i.e. the backache specialist. Moov, which was not the pioneer with regard to pain balm, created an appealing benefit-based imagery leading to the brand's acceptance. Moov

45 Source: http://www.triloncom.com/main.html
46 Source: www.paraspharma.com/moov.htm
also effectively used imagery to compete with Iodex on the 'staining' aspect of the offering (Kumar, 2004). Through the housewife the brand penetrated into the family and rest as we know is history.

In 2002, Moov was also launched as an aerosol spray, enhancing its brand image. Moov’s sales have, reportedly, grown steadily at 20 per cent year-on-year at the cost of market leader Iodex, whose share dwindled from 28 in 2002 to 20 per cent in 2003 (Shukla, 2005). As a response to the tremendous popularity of Moov, Smithkline Beecham’s Iodex changed its decades-old avatar of the gooey black pain balm in its unattractive black bottle packaging to the natty, happening Iodex Power Cream. The success of Paras’s Moov is reflected in the fact that in a short span, it has become the major brand in the Rs 400 crore pain-relieving rubefacients market (FE, 2001). Paras pharmaceuticals re-wrote the rules of the OTC category with smart media spends and focused strategic consumer attention. 14 years since its foray into the rubefacient category, Moov has carved a niche for itself in the consumer’s life and has become synonymous with backaches. Moov has become the Indian housewife’s soul mate by underlining the seriousness of a backache. It has elevated her social status by making her family appreciate her relentless contribution to their well-being, while ignoring her own. By recognizing current high-stress, hectic lifestyles of the male as well as women, Moov contributes to saving many valuable minutes rendered painful by backaches, making their life a superhit. It is a saga in itself and today Moov is a household name and the brand is looked upon as a success story as the marketing and communication strategies uprooted the market leader Iodex.

The rational for selecting “Moov” as a brand is the rigor with which it faced the market leader and proved to be a rare case of a market challenger becoming a market leader. Post liberalization, competition has increased and consumers have changed and therefore it would be interesting to study the communication content of the brand.

47 Source: www.paraspharma.com/moov.htm
4.4 FEVICOL AND THE ADHESIVES CATEGORY

Since its inception in 1959, Pidilite Industries Limited has been a pioneer in consumer and specialties chemicals in India. Over two-third of the company’s sales come from products and segments it has pioneered in India. The strongest among the many brands, is the Rs 240-crore synthetic resin adhesive (or white glue) Fevicol. Launched in 1959, Fevicol, with a 60 to 65 per cent market share in the Rs 400-crore white glue segment, contributes nearly 50 per cent to Pidilite’s turnover. The unique selling proposition for Fevicol was that it was offered in ready-to-use format, while animal-based resins had to be boiled first and this became the convenience factor for the carpenters and helped Fevicol in penetrating in the Indian market. Fevicol is synonymous with adhesives in India. Pidilite offers an extensive range of consumer, craftsmen, engineering and industrial adhesives under Fevicol brand name. Excellent quality, extensive product range, close relations with customers and award winning advertisement have made Fevicol one of the most trusted brands in India and the largest selling adhesives brand in Asia. Fevicol is the undisputed market leader with a market share above 60 percent (Shashidhar, 2006). This is a striking example where the brand has become bigger than the company and has been the cash cow since last five decades.

In the mid-seventies, as consumer lifestyles changed with more and more furniture being made in homes, offices or shops, the company stepped up its marketing efforts with advertising. Competition came from small players who had lucrative price points and multi-nationals. But Fevicol managed to ride through all storms due to its clutter breaking commercials which has an instant connect with the audiences due to the use of wit and humour. The Fevicol campaign over the years has resulted in making it a 'numero uno' brand in a segment, dominated by unbranded, unorganized, low involvement and low cost products. Initially, the focus of the campaign was to convert unbranded Saresh users to use branded synthetic adhesives by communicating the values of 'Fevicol - the ultimate adhesive'. Later on, the focus shifted to market penetration and protection. This was achieved by owning 'bonding' by communicating 'Fevicol is bonding and bonding is Fevicol'. The results have been truly spectacular.

Two key drivers have made Fevicol a power brand - a continuously innovative approach to own 'bonding' and retaining the Indian flavour in the communication with a touch of humour. Today, after a decade, the brand is a market leader and continues to grow at a rate faster than the market growth.

Successful advertising calls for a single minded approach to communication. Fevicol has been doing this with élan as far as the humour goes in its advertisements. So, if an unbreakable egg became an expression of the brand's adhesive property because the hen was roosting on a can of Fevicol, it went a step further when it invaded the dream of a young bridegroom whose movement gets restricted because of a can of Fevicol kept near him. Then there was the commercial in which the shadow of a man gets stuck when he passes by a shop shutter with a Fevicol ad painted on it. The commercial of a bus overflowing with passengers, which manages to keep the entire people safe on board because of Fevicol, garnered the awards as well. The strength of the brand was highlighted in the 'Suicide' commercial, where the stool breaks because it wasn't stuck together with Fevicol (Anand, 2006). The target consumer of Fevicol is the carpenter but the communication strategy has always been broad based. Ads talk to everyone and to all strata of the society in order to create brand salience (Shatrujeet, 2000). The best example of an elastic idea in Indian advertising is Fevicol, from ad films to print to outdoor to radio, Fevicol is a brilliant example of how the idea of 'Fevicol ka jod' has been stretched effortlessly across media (Shatrujeet, 2004). Ranjan Kapur of O&M says that "Analogously and metaphorically, Fevicol today stands for an area where bonds will not break."

It would be insightful as well as interesting to uncover the commercials of Fevicol and see how with humour being kept intact, the ads have changed. Content analysis will give an in-depth understanding of the advertising strategy of the most talked about brand. It would be wonderful to see the ads and analyze the content of a brand which has top of the mind recall like an FMCG product.

52 A speech given at AAAI by Deepa Kakkar, a consultant, published in www.agencyfaws.com
4.5 SONATA AND THE WRIST WATCH CATEGORY

Titan Industries was established in 1984 as a joint venture between the Tata Group and the Tamil Nadu Industrial Development Corporation; the company brought about a paradigm shift in the Indian watch market, offering quartz technology with international styling, manufactured in a state-of-the-art factory at Hosur, Tamil Nadu. Titan group has titan watches for the premium segment, Fastrack for the youth, Sonata it's the value seeker and Xylus for the upper premium segment of consumers in its portfolio. Titan Edge is positioned as the world's slimmest watch and the feminine and attractive Raga is for women. Nebula is the watch with diamond and gold jewellery. The total watches market is about 36 million units and is worth Rs 2,200 crore (Rs 22 billion) (industry estimates). Of this, the Rs 300-1,000 price band is noteworthy. It accounts for 45 per cent value share and 16 million units in terms of volume, and is growing at 6-7 per cent a year (Subramanian, 2007). In the organized watch market, Titan Industries has a 60 percent market share53.

Leveraging its understanding of different segments in the watch market, the company launched a second independent watch brand-Sonata, as a value brand to those seeking to buy functionally styled watches at affordable prices. Sonata is the Value for Money watch brand from Titan Industries Ltd. It is targeted at consumers seeking durability and value, with a clear positioning of "No compromise watch". Sonata comes with the backing of being a Tata product with five clear functional attributes, Affordability, looks, 1 Year Guarantee, Waterproof (up to 30m water resistant) and Durability. It is therefore known as "5 Ghadi ke barabar" an equivalent for no-compromise watch. Nearly 68% of the Indian watch market (on a value basis), or 85% (on a volume basis), comprise watches priced below Rs500. Sonata is a key brand for the company as it contributed more than 50% of watch segment revenues of Rs653.6 crore (Malviya, 2007). It is India's largest selling watch brand with a sale of over 30 Lakh watches in 2003-0454. Understanding the differences in the strength of the two brands i.e. titan and sonata, the company took a decision to market Sonata as a product of

53 Information obtained from www.titanworld.com
54 Information obtained from the titan website on 5th October 2007.
Tata (BS, 2001)\textsuperscript{55}. The Sonata brand is being endorsed by the cricket icon Mahendra Singh Dhoni who himself is a small town boy who made it big in the world of cricket and thus has a strong brand fit. The brand has a strong rural thrust due to its pricing strategy. In an unconventional distribution strategy, these ultra low-priced watches will be sold not only through Titan showrooms and multi-brand outlets, but also through Tata Kisan Sansars spread across almost 14,000 villages in the country (Malviya, 2007). It is aiming at becoming a mass market brand affordable by the bottom of the pyramid.

Sonata came into existence as a brand when there was a break up between Titan and Times. The brand was launched to cater to the price-value conscious consumer and to occupy the place which was vacated by the exit of Timex from the Titan showrooms. This means that Sonata was launched at a time when the Indian market was highly competitive and consumers were brand literate. With changing times, watches have become fashion accessories and mobile phone is emerging as a strong competitor. The rational for choosing the brand is the fact that communication would be challenging as the target audience is the bottom of the pyramid and the lower end is full of players from the unorganized market. So a study of print ads would provide an insight into the level of informativeness.

\textsuperscript{55} Retrieved from http://www.tata.com/citan/media/20010507.htm
4.6 DAIRY MILK AND THE CHOCOLATE CATEGORY

Cadbury India Ltd. (CIL) is the wholly-owned subsidiary of the leading global confectionery and beverages major Cadbury Schweppes. From a trading corporation that began operations in India in 1947, CIL has become a market leader in the confectionery segment. Cadbury has a 70 percent market share in chocolates. Some of its brands are Dairy Milk, 5 Star, Gems and Perk. Cadbury’s Dairy Milk (CDM) is its flagship brand, having a market share of 30% and average daily sales of 1 million bars. The story of Cadbury Dairy Milk started way back in 1905 at Bournville, U.K., but the journey with chocolate lovers in India began in 1948.

The Chocolate market in India is a niche market penetrated largely in urban areas and per capita consumption is low as compared to those in developed countries of the West. Cadbury Dairy Milk is the largest and most loved chocolate brand in the country. In fact, it has attained generic status and today one in every four bars of chocolate consumed is a Cadbury Dairy Milk. In the early 90's, chocolates were seen as 'meant for kids', usually a reward or a bribe for children. Chocolates were seen more as a western sweet and consumption was occasion based i.e. chocolates were eaten more on birthdays and on special occasions. Therefore, Cadbury had positioned Dairy Milk as a chocolate meant for kids. Parents or adults involved in the communication were most of the times shown as gifting the chocolate to kids.

In the Mid 90's the category was re-defined by the very popular 'Real Taste of Life' campaign, shifting the focus from 'just for kids' to the 'kid in all of us'. It appealed to the child in every adult. And Cadbury Dairy Milk became the perfect expression of 'spontaneity' and 'shared good feelings'. This move reflected the fact that Cadbury wanted to reach out to more number of people in the country. In the late 90's, to further expand the category, the focus shifted towards widening chocolate consumption amongst the masses, through the 'Khanewalon Ko Khane Ka Bahana Chahiye' campaign. This campaign built social acceptance for chocolate consumption amongst adults, by showcasing collective and shared moments. More recently, the

58 Source: http://www.ogilvyindia.com/work/cadbury.asp
'Kuch Meetha Ho Jaaye' campaign associated Cadbury Dairy Milk with celebratory occasions and the phrase "Pappu Pass Ho Gaya" became part of street language. It has been adopted by consumers and today is used extensively to express joy in a moment of achievement /success\(^59\). Now the brand wants to stretch further by directly attacking the "Mithai" market in India. All marketing and communications efforts are now focused on positioning Cadbury Dairy Milk as "Mithai" in the consumer's minds and thereby directly competing with the traditional and home made Indian sweets. Cadbury wants to double its turnover by 2010, which calls for a growth rate of over 20 percent per annum which means more people will have to eat more chocolates (Gopalan, 2007). However the road ahead is bumpy as there is a strong competitor from Nestle and more foreign brands are entering into the Indian market. In a brand restructuring exercise, Cadbury Dairy Milk has been identified as a power brand. This has been identified as a move to re-align Cadbury India group's activities with the parent company Cadbury Schweppes. The clear focus is on chocolates as many beverage and chewing gum brands are being phased out in India\(^60\). Cadbury Dairy Milk is a brand which is close to the hearts of Indians and is always remembered as a brand that makes emotionally striking ads. Dairy Milk ad was ranked as number one in the Synovate Survey published in Mint in terms of awareness, brand recall and recognition (Mint, 2007). The "Real taste of life" ad with the "girl dancing on the cricket field" has remained etched in everyone's memory, as the most spontaneous & un-inhibited expression of happiness. This campaign went on to be awarded 'The Campaign of the Century', in India at the Abby (Ad Club, Mumbai) awards\(^61\). As Dairy Milk itself has got invented and re-invented in India, the focus of its advertising strategy has also changed over time. So it would be interesting to see how ad content has changed to be in tandem with the changing marketing strategies and corporate goals.


\(^61\) Source: http://www.cadburyindia.com/brands/choco1.asp
4.7 FAIR & LOVELY AND THE FAIRNESS CREAMS CATEGORY

The skincare sector boasts of the largest number of product categories - from dominant skin lighteners, cleansers, moisturizers, astringents, eye contour gels, face wash, face scrub, face packs, cold cream, peel off to anti-wrinkle creams and depilatory creams. Images India, the annual international beauty fair estimate puts the rate of the skincare industry (along with shampoos) growing by about 200 per cent in the last five years (1995-1999). The main players are Fair & Lovely, Fairever, Fairglow and Himami. All strong fairness cream brands have extended their brand’s equity to beauty soaps. A woman's passion for beauty is universal and catering to this strong need is Fair & Lovely. Based on a revolutionary breakthrough in skin lightening technology, Fair & Lovely was launched in 1978. Other than HUL there are players like Cavin Kare, Godrej, Emami Vicco and Himalaya Drug Company. Given the rate at which the fairness products segment is galloping - a whopping 20 per cent annual growth rate - this category has witnessed a fair bit of action. There are at least seven big players, each launching many variants. First there was just the fairness cream. Then Godrej launched fairness soap, quick-use sachets came soon after, followed by ayurvedic and herbal fairness creams. And finally the gender specific fairness products came into the Indian market (Kumar, 2006).

Most brands that dominate categories in India have the advantage of legacy on their side, by virtue of having been the first to market so much so that they are category creators. If the Rs.850 crore Fair & Lovely brand accounts for approximately 75% of market, valued at roughly Rs.1200 crore, it’s because the brand was launched over four decades ago as India’s first fairness cream (Vyas and Shatrujeet, 2007). HUL launched the brand in sachets in 1991 to reach out to the price conscious consumers and today they account for 50% of the total sales. Launch of Fair & Lovely Ayurveda and variants for different skin types maintained relevance for the brand. The brand today offers a substantive range of products, including Ayurvedic Fair & Lovely Fairness cream, Fair & Lovely Anti-Marks cream, Fair & Lovely Oil control Fairness Gel, Fair & Lovely for Deep Skin and Fair & Lovely Fairness Soap. The latest has been the Perfect Radiance, a complete range of 12 premium skincare solutions from

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62 Information obtained from www.magindia.com, market overview section
63 Source: http://www.hll.com/brands/fairnlovely.asp
Fair & Lovely\(^64\). The closest competitor Emami gave nightmare to this power brand by launching Emami Fair & Handsome, a fairness cream for men and becoming the first entrant in the virgin market. Emami was the first to recognize the upcoming trend of male grooming and metro-sexual male. As a strong reaction, HUL launched Menz Active for men.

Fair & Lovely’s advertisements over the years have changed. From a dull looking girl worried about getting a good match due to dark skin, ads have shifted to positive messages. Current ads focus on the brand being an enabler in realizing ones potential and fulfilling dreams. Deeply-rooted ideas about women’s roles are slowly shifting in India. The percentage of women married before the age of 19, for example, has dropped sharply. Advertising and marketing gurus are aiming at young, urban Indian women, who are earning their own money and are potential customers for a host of products, including branded clothes, cosmetics and new cars (Timmons, 2007). Moreover, the fairness cream brand also had to face some trouble from the activist groups when one of the ads was high on gender bias.

The rational for selecting this brand for study is the unusual pattern in which its communication is taking shape. It has changed for better. It has moved into the positive mind space and thus it would be interesting to note the changes in the advertisements of a brand that has ruled the Indian market for years!

\(^64\) Source: http://www.hll.com/brands/fairnlovely.asp
4.8 LIFEBUOY AND THE TOILET SOAP CATEGORY

The soap industry in India is classified into premium, popular and carbolic brand of soaps. Premium constituted of Lux International, Mysore sandal, Pears and some international brands. Popular brands were Cinthol, Hamam, and Lux and carbolic were brands like Lifebuoy and Nirma bath. In the mid-1990s, this structure altered a bit when vegetable oil prices slid 40 to 50 per cent, giving manufacturers a huge cost advantage. The result of this was the creation of the "discount segment", which offered soaps 10 to 15 per cent cheaper than the popular segment. Popular segment has witnessed maximum growth within toilet soaps and it is the category driver. Consumers down grade from the premium segment as and when they see better value in the popular category; at the same time consumer's upgrade from the economy segment due to increased aspirations & affordability (Shahra, 2006)65. Hindustan Lever Ltd, Wipro Ltd, Godrej Soaps Ltd, Nirma, Procter & Gamble are the major players in the Rs.4800 crore toilet soap industry. Hindustan Unilever Limited (HUL) has a strong presence in the toilet soap category with brands like Lux, Lifebuoy, Pears, Liril, Hamam, Breeze, Dove, and Rexona. All brands are targeted at different segments of consumers and therefore accordingly positioned. With the major power branding exercise being undertaken by HUL to manage its product portfolio, many brands were repositioned and portfolios were restructured (Singh, 2003). While the Liril brand saw variants and a drastic change in its advertising strategy, Lux celebrated its 75 years of existence through innovative flavours and celebrities.

Launched in 1895, Lifebuoy, for over 100 years has been synonymous with health and value. The brick red soap, with its perfume and popular Lifebuoy jingle, has carried the Lifebuoy message of health across the length and breadth of the country, making it the largest selling soap brand in the world. Lifebuoy one of the power brands of HUL, is being used by about 600 million consumers, with about 2 million tablets sold every day66. HUL's 107-year-old brand, Lifebuoy, was re-launched with a new formulation as a milled toilet soap and a completely new positioning as a family health soap. The strategy, to maintain the leadership of India's largest selling soap and extend its health equity beyond its 60 crore existing consumers restored the growth of

Lifebuoy. The 100 plus years old brand Lifebuoy, which was positioned purely as a health soap targeted at a male population, has now got rid of its carbolic nature, smells different and is positioned as a family soap. This was a conscious move from HUL in 2002 to do away with the carbolic soap. In order to launch the new Lifebuoy soap in rural markets, HUL had a massive social marketing program called “Lifebuoy Swasthya Chetna”, a consumer contact program to spread the health and hygiene awareness and make a dent into the rural markets (Business Standard, 2002). The repositioning exercise resulted in Lifebuoy featuring as a family soap but managed to keep the core of the brand intact. Right from those days when it addressed the macho Indian male, in the form of a bright red chunky soap cake, until early 2000, when it started targeting the Indian woman as a soap that would help her family fight germs and keep illnesses at bay, its core positioning has always been health and hygiene. Advertising and brand gurus say it is this consistency in the core positioning that has helped the brand retain its glory and given it the status of a heritage brand (Shashidhar and Srinivasan, 2002).

Only 30 percent of the total sales volume of Lifebuoy comes from urban markets and that’s a challenge for the brand. The new look and shape, variants, shift in the protagonist in ads and many other such changes have been made in order to penetrate further in the urban markets and among premium segment households (Shatrujeet and Shukla, 2005).

Lifebuoy has a rich heritage. With changing marketing environment, the brand has responded through various initiatives like new product variants, repositioning, rechristened advertising content, targeting rural markets and so on and so forth. Therefore it would be exciting to study the post liberalization changes in the advertising content of Lifebuoy.

4.9 NIRMA AND THE DETERGENT CATEGORY

The Soaps & Detergents Industry is characterized by a number of small scale manufacturers at one end of the spectrum and large companies (including MNC's) at the other end. The market for Soaps & Detergents has increased manifold with changing lifestyles, growing purchasing power, increased awareness about personal hygiene, responsiveness of the consumer to brands offering superior value and the spread of audio-visual media. Fabric Wash Industry in India is characterized by (like any other non-durable product category in India) low per capita consumption and substantial potential in rural markets (in terms of category penetration and per capita consumption). Per capita consumption of fabric wash products in India is just 3.1 Kg, which is very low compared to developed economies and some developing countries. The Fabric Wash Industry is divided into Laundry Soaps, Synthetic Detergent Cakes & Powder. Washing powders are categorized into four price segments - compact (selling prices at over Rs 120 per kg), premium (Rs 90-120 per kg), mid-priced (Rs 25-90 per kg), and economy (less than Rs 25 per kg) (Krishnan, 2001). The first companies to manufacture detergents in India were HLL and Swastik. HLL test marketed Surf between 1956 and 1958 and began manufacturing it from 1959. Swastik launched Det, a white detergent powder, in 1957. HLL dominated the market with a share of almost 70%. It was in the late 1970s that HLL’s leadership position was challenged by a low priced detergent 'Nirma'. Nirma is one of the few names which are instantly recognized as a true Indian brand, which took on mighty multinationals and rewrote the marketing rules to win the heart of the consumer. Nirma, the proverbial ‘Rags to Riches’ saga of Dr. Karsanbhai Patel, is a classic example of the success of Indian entrepreneurship in the face of stiff competition. Starting as a one-man operation in 1969, today, it has an annual turnover of above Rs. 2500 crore. At a time when market was dominated by premium brands priced at Rs.13 per kg, Nirma was launched at an astonishing price of Rs. 3 per kg which took the market by a storm and created a new category of consumers who were looking at “value for money”. The performance of Nirma during the 1980s was termed as “Marketing Miracle” of an era. The launch, quick penetration and glorious success of Nirma gave nightmares to the FMCG giant HUL. HUL had to rejuvenate the Surf

68 Source: http://www.karvy.com/compresearch/company/Nirma/Nirma_Mohit_shiva_new.htm
69 Source: http://www.thehindabusinessline.com/jw/2001/12/30/stories/0530e051.htm
70 Source: http://www.nirma.co.in/genesis.htm
brand and give it a fresh look through marketing and advertising strategies. The famous "Lalitaji" campaign was specially created by HUL to fight with Nirma and the success of the campaign did manage to bring back some of the lost market share. Later, Nirma launched Super Nirma for the premium segment and Nirma Popular for the lower end. The Nirma Popular detergent is targeted at non-users and gives an excellent price advantage in order to convert them into users of detergent. The Nirma brand became so well known in the country that it was extended to toilet soaps and detergent cakes. Later it was also extended to the food segment with the launch of Nirma Salt. However, history did not repeat itself in case of premium detergents and some other products. Nirma's strong association with the VFM (value for money segment) has possibly been its biggest impediment while venturing into new areas, especially when it intends going up the value chain (Chatterjee, 2002). Nirma also went in for backward integration and started producing raw materials in order to have a direct control over demand and supply of raw materials as well as finished goods. Today, the Nirma group is into industrial products, packaged foods, detergents, toilet soaps and fertilizers. The jingle created decades ago still continues to play in radio and television ads.

The rational for selecting Nirma detergents to study the advertisement content is the fact that this is one Indian brand which gave tough competition to MNC brands and is still going strong after so many years of its existence.
4.10 HUTCH NOW VODAFONE AND THE MOBILE SERVICE PROVIDER INDUSTRY

The importance of cellular phones couldn't have been better stated than in the New Telecom Policy of 1999 - "The Government of India recognizes that the provision of a world class telecommunications infrastructure and information is the key to rapid economic and social development of the country."

In 1992, licenses were awarded to private sector to operate basic and cellular services throughout the country. The whole country was divided into the 4 metropolitan cities of Delhi, Bombay, Calcutta and Madras and 19 telecom circles. The cellular industry has 42 networks, covering more than 600 towns and 7 cities\(^{71}\). The Indian telecom sector is amongst the top 10 networks in the world in terms of size and is the second largest amongst emerging economies after China (Capital Market, 2001). Some of the leading players in the mobile service industry are Bharti Airtel, Vodafone, Idea Cellular, BSNL, Reliance, BPL and many more. The Internet and Mobile Association of India reports the mobile subscriber base in India has crossed the 100 million mark in 2006 and 3 to 4 billion subscribers are being added every month making it a very strong and evolved mobile phone and services market. 80 percent of the subscribers have pre-paid connections and therefore it dominates the market\(^{72}\). In this highly competitive market, mobile service providers are trying to woo consumers through life time free connections and a host of value added services like gaming and download. The biggest challenge today in the mobile service category is that of consumer retention. With every other operator offering better schemes, consumer loyalty is at stake. With number portability feature soon going to be a reality, tougher times await the service providers.

One acquisition that the entire corporate world took note of was that of Hutch, the country's fourth-largest service provider being acquired by Vodafone. Over the years, Vodafone Essar, under the Hutch brand, has been named the 'Most Respected Telecom Company', the 'Best Mobile Service in the country' and the 'Most Creative and Most Effective Advertiser of the Year' (John, 2007). Vodafone, the world's leading mobile telecommunication company, completed the acquisition of Hutchison Essar in May 2007 and the company was formally renamed Vodafone Essar in July

\(^{71}\) Source: www.magindia.com, market overview section

\(^{72}\) A report on VAS prepared jointly by IAMAI and IMRB in 2007.
2007\textsuperscript{73}. Mr. Harit Nagpal, Marketing and New Business Director, Vodafone Essar, said, "This transition is probably the largest brand change ever undertaken in this country and arguably as big as any in the world. It is even larger than our own previous brand transitions as it touches over 35 million customers, across 400,000 shops and thousands of our own and our business associates' employees." As a brand, Hutch has a history of transformations: From the initial MaxTouch over a decade ago, the brand was converted into Orange in 2001 (one may recall the ‘Hi!’ campaigns). Later, it was made Hutch elsewhere and Orange in Mumbai. Following this, in 2005, Hutch moved away from its orange-coloured logo and went all pink (simultaneously, Orange, too, was integrated into Hutch in Mumbai) (Joshi, 2007)\textsuperscript{74}.

The brand transformation witnessed a huge marketing effort pan-India across all media to announce to the consumers the change in the brand name. The symbols which were dear to the consumer like the famous iconic pug and the animated girl and boy characters were preserved in the ads. The "Hutch is now Vodafone" commercials painted the entire nation with the "red" colour and new logo in order to evoke consumer attention. Vodafone signed a deal with STAR India wherein it was assured that no other commercials were aired on the channel for the 24 hours. Media innovations like the 24 hour deal, merging the brand into the show content, internet gaming, branding auto rickshaw covers, tents, franchise outlets etc. were undertaken to ensure that the transformation message reaches to every corner of the country.

Hutch nee Vodafone advertisements have always been the talk of the town. As a brand, it has gone through major transformations and makeovers making communication efforts strategic. Thus, it would be quite enticing to study the advertisements and try and analyze the changes therein.


\textsuperscript{74} Source: http://www.agencyfaqs.com/perl/news/index.html?sid=19125
4.11 DHARA AND THE EDIBLE OIL CATEGORY

Refined Vegetable oil was the first variant launched under the brand name Dhara in 1988, a brand from National Dairy Development Board, Anand, India. Among FMCG products, edible oil has one of the highest penetration of 98% in urban as well as in rural area but out of the total oil consumption of 9mn ton p.a., refined oil accounts for only around 2mn ton. 70% of refined oil is sold in loose unbranded form. Edible oils were of two types: loose and branded. Loose oil constituted the bulk (perhaps about 70 percent) of the total market. Among the branded oils, there were many which were just local brands with little brand recall, but just served the purpose of being put in a tin with a name on top. The main branded players were Dhara and ITC’s oil division, with many brands. It was believed that with increasing discretionary income, the tastes of consumers would swing more to the branded end of the market. Most of the advertisements were either on the purity platform or on the health platform i.e. low/zero cholesterol (Manikutty, 2000). The major players in the market today are Dhara, ITC, HUL, Marico Group, Godrej Foods.

From the beginning Dhara’s image has been built around purity and taste and it was for the first time that consumers were getting edible oil in a tamper proof tetra pack. Sunflower oil, the fifth variant to be launched under the umbrella brand Dhara, in 1992 was also seen in the same light by the consumers. By 1996, the sunflower oil category showed tremendous growth potential. A research conducted in the same year brought up three significant pointers: Health was an important consideration while buying edible oil; Consumers perceived sunflower oil as healthy oil and despite this, Dhara Sunflower Oil was not in the consideration of such consumers. In light of this, it was clear that Dhara Sunflower Oil would need to be positioned on the ‘good health’ platform, as different from the Dhara image of purity. A decision was taken to re-launch the sunflower oil variant as a sub-brand to help it maintain a distinct identity from the mother brand Dhara. The consumer insight was that consumers’ expectation of health from edible oil was a better quality of everyday life, (rather than strength or fitness). Health in this day-to-day context is more relatable to a wider audience.

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76 Information obtained from www.magindia.com, market overview section.
77 Information obtained from www.magindia.com, market overview section.
Therefore, the communication strategy was to communicate a compelling health proposition with a communication objective of extending the franchise of Dhara to the health conscious sunflower oil consumer. The target audience was housewives in SEC A, B and C, 25+. The branding was kept simple and the key benefit was in the name itself – Dhara Health. The product benefit of feeling lighter was delivered through an emotional promise. The emotional core for the campaign was ‘Pride in Dad’. Kids value the quality time spent with their Dads. The communication was built around how Dads can feel more energetic even after a complete day work and still have the energy to play with the kids. It was articulated in the phrase - ‘My Daddy Strongest’. The launch was announced across all leading national dailies & TV channels so as to maximize target reach. To ensure outdoor visibility, POPs, Shop boards and Hoardings were taken in key centers. With an aim to make it the flagship brand, and ensure high trial rates there were some special initiatives like Father’s Day Promotion, Medal Scheme & Small Town Press Campaigns.

To strengthen Dhara Health’s platform of ‘Pride in Dad’, in June 1998, Dhara Health celebrated Father’s Day with a unique promotion. The offer was a free Dhara Health T-Shirt printed with the photograph of father and child for the first 5000 entrants who sent in their photographs. A single release in daily press fetched 25,000 responses. The launch of Dhara Health was very successful and resulted in trial rates and repeat purchases which were much higher than any of the competitive brands launched during the same time period.

Today, Dhara is available in groundnut, mustard, refined vegetable, health refined sunflower and fit-n-fine refined soybean oil variants. The rational for selecting “Dhara” as a brand is the fact that an edible oil brand launched and promoted by NDDB against highly competent FMCG brands. The advertising strategy was successful in making “Dhara” a household name and therefore it would be interesting to study print ads and understand the content.
4.12 Chapter Bibliography:


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