



CREATIVE
CULTURE

SUSTAINABILITY AND DIVERSITY IN INDIA

August 2019

INTRODUCTION



WHY DO BUSINESS IN INDIA?

Regardless of the type of product or service your company offers, the benefits of entering the Indian market are self-evident. The UN's most recent data shows that the country is home to 1.37 billion of the world's 7.7 billion inhabitants and covers a landmass around a third of the size of the United States. While many Indians still live in poverty, the country's economy has undergone profound changes in recent decades as an increasing proportion of the populace enters the middle classes. Recent estimates by McKinsey suggest that India's consumer class could comprise 89 million households by 2025. Similarly, consumer spending is expected to grow from US\$1.5 trillion in 2019 to US\$6 trillion by 2030.

Moreover, the sheer size of India's mega-cities means that many of these new consumers are easier to reach than ever. India's largest city is Mumbai, with a population of 12.5 million, but there are over 50 urban areas that over 1 million Indians call home.

These factors and many others make India an excellent target market, but companies seeking to carve out a niche for themselves in India must ensure that they understand the scale of the challenge that lies ahead.

Some of the very reasons that make India an appealing target market also create difficulties for companies seeking to advertise and sell their products there. India's vast geography and large population are dazzlingly diverse in terms of language, religion, culture and economics. Brands who fail to navigate through this complex landscape risk their message not having the desired impact on consumers or even – in the worst-case scenario – causing offence unintentionally.

Like all nations, India faces the threat of climate change and the prospect of dwindling supplies of key resources. To mitigate these risks, governments, citizens and private-sector companies will need to completely overhaul many aspects of the status quo, from public infrastructure to corporate business models. India is certainly not alone in facing these challenges, but the hurdles for developing nations are even harder to overcome because they must be approached by a society in the midst of other, equally profound, changes.

In this White Paper, we will provide a broad overview of India's advertising landscape, before taking a closer look at the issues of diversity and sustainability. We will consider a number of case studies of recent advertising campaigns run by brands that have tackled these topics in an effective and engaging way.



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MARKETING AND ADVERTISING



MARKETING AND ADVERTISING LANDSCAPE IN INDIA

The Indian marketing/advertising sector is mature and thriving – India became the world’s tenth largest advertising market in terms of ad spend in 2018. As such, brands wishing to promote their products in India may do so through many of the same channels that exist elsewhere.

Television and film

Television and film are huge industries in India, so companies that choose to promote their products in this way have the potential to reach vast numbers of people. Live broadcasts of sports events such as cricket (69% of viewership in 2018) and wrestling (12% of viewership in 2018) are also invaluable opportunities for advertisers. In 2019, television accounts for 40% of ad spending.

Print

India bucks the trend seen in many other nations: its print media ad segment is growing while those of many other countries are in decline. According to Shashi Sinha of IPG Mediabrands, print media is attracting a greater readership because it is perceived as more trustworthy than other forms of media in the context of the “fake news” phenomenon.

Digital

Digital advertising accounts for 20% of ad spend in 2019, but its growth rate is double that of television advertising. Social media penetration stood at 17% in 2018. This is fairly low compared with other countries in percentage terms, but high if thought of as an absolute number of users. YouTube, Facebook, WhatsApp and Instagram are the country’s most popular social media platforms, although the TikTok app was downloaded by 119.3 million Indians in 2018. Approximately 35% of the Indian population currently have internet access, and this figure is set to rise to 55% by 2025.



SUSTAINABILITY



SUSTAINABILITY IN THE INDIAN CONTEXT: KEY ISSUES

Climate change, population density and overuse of finite natural resources make modern lifestyles unsustainable in the long term. In India, the move towards sustainability stems from a few key issues that interrelate and are intrinsically tied to wealth disparity and public health.

Water crisis

The water crisis in India is a significant issue facing the entire country, from rural areas to large cities like Bengaluru (Bangalore) and Chennai (Madras). As India's economy develops and more people rise to the middle class, water production processes will inevitably increase.

Air pollution

Vehicles and thermal power plants are the main sources of air pollution, and both rural and urban areas are severely exposed to polluted air in India. In early 2019, India's National Clean Air Program was launched with the aim of reducing air pollution, which currently has a significant impact on public health across India.

Agriculture's carbon footprint

39% of global agricultural emissions come from four places: China, India, Brazil, and the US. This has a major impact on dangerous weather patterns. Heatwaves and the deaths and illnesses caused by them have doubled in the past year in India.

Brands operating in India must be aware of these issues. Those that are seen as "eco-friendly" are likely to gain greater loyalty from the growing proportion of the population who want to make "green" choices and combat environmental problems. In this section, we will consider three case studies of brands that have based campaigns on sustainability.



SUSTAINABILITY



HOW BRANDS GO ABOUT IT

“The forest man of India”

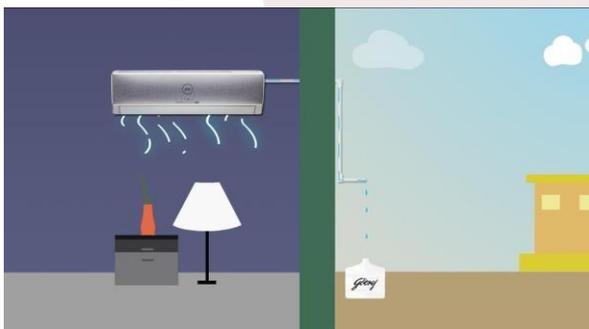
In 2017, the asset management company Prudential launched a campaign to show the difference one individual can make if they apply their values to their daily lives consistently. In 1979, Jadav Payeng chose to start planting trees every day along the banks of the Brahmaputra River. By 2017, he had forested over 1,400 acres of land and protected an immense area against the social and economic damage caused by floods. The ad closes with the words “*Consistency is the only currency that matters.*” This is a good example of a brand promoting sustainability while also highlighting its own core values of consistency, strategic thinking and long-term success.

<http://bit.ly/30Inle2>

#MyACsavesWater

Launched in 2018, Godrej Appliances’ #MyACsavesWater campaign focuses on the issue of water scarcity, which currently affects almost a fifth of the world’s population. In an eight-hour period, an air conditioning unit generates almost 10 litres of water, or 8% of the tap water used in one day by the average Indian citizen. Godrej Appliances started providing collapsible water containers to collect this water so that it could be put to use rather than wasted.

<http://bit.ly/2KMgdaO>



“Save the world, save the tree”

In Tata Pravesh’s advert “*Save the world, save the tree*”, a group of adults are given a set of coloured pencils and asked to draw a picture. They use up many of the bright colours such as blue and green. Once they have finished, a group of young children are asked to draw a picture using only the coloured pencils that are left over (mostly shades of grey, black and brown). On-screen text is then shown that reads “*If we use up all the green, our next generation will be left with none.*”

This message is highly effective, as is the contrast between the adults with their brightly coloured pictures and the children holding up drawings that seem dark and forbidding in comparison. Finally, the on-screen text informs viewers that the company plants a tree for every two doors it installs, associating environmental consciousness and future happiness with the brand.

<http://bit.ly/2U01Na4>



DIVERSITY



THE MANY MEANINGS OF DIVERSITY IN INDIA

The fact that India is a complex country is widely known, but it can sometimes be hard for outsiders to grasp the true extent of this diversity. Here we provide a broad overview of several key aspects before examining how brands have chosen to respond.

Religion

Over 80% of the population identify as Hindu. A further 13% describe themselves as Muslim, and there are also sizeable communities of Christians, Sikhs, Buddhists and Jains. By contrast, very few Indians describe themselves as atheists.

Gender

The circumstances women in India face are challenging and unique to Indian culture. According to NFHS data, 40% of married women in India have experienced physical, sexual, or emotional violence perpetrated by a spouse. Patrilineality, which is inheritance through sons, is traditional and deeply ingrained in Indian culture, as is the dowry system that involves a payment from the bride's family to the groom's upon marriage. However, this tradition has decreased significantly in recent years. 72% of Indian millennials are against traditional gender roles that impose domestic labour on the women of the household. Women are increasingly participating in education as well. According to J. Walter Thompson's Women's Index, Indian women believe that women should support each other, that tech plays an important role in empowering women, and that women should *'spread their wings within the purview of established propriety.'* These insights are key in understanding how marketers can engage women in India.



Language

India is one of the most linguistically diverse countries on earth. In the most recent census, carried out in 2011, 121 languages are considered mother tongues. This includes Hindi, English, Bengali, and Telugu. Many Indians speak more than one language to ease communication with their fellow citizens. 22 languages are currently enshrined in the country's constitution, but there are calls for this number to increase. Brands should carefully consider language when devising advertising, as the way in which a message is presented can be just as important as the message itself. Brands that choose the wrong language in a specific context may not see any returns on their investment, and they run the risk of alienating prospective customers.

DIVERSITY



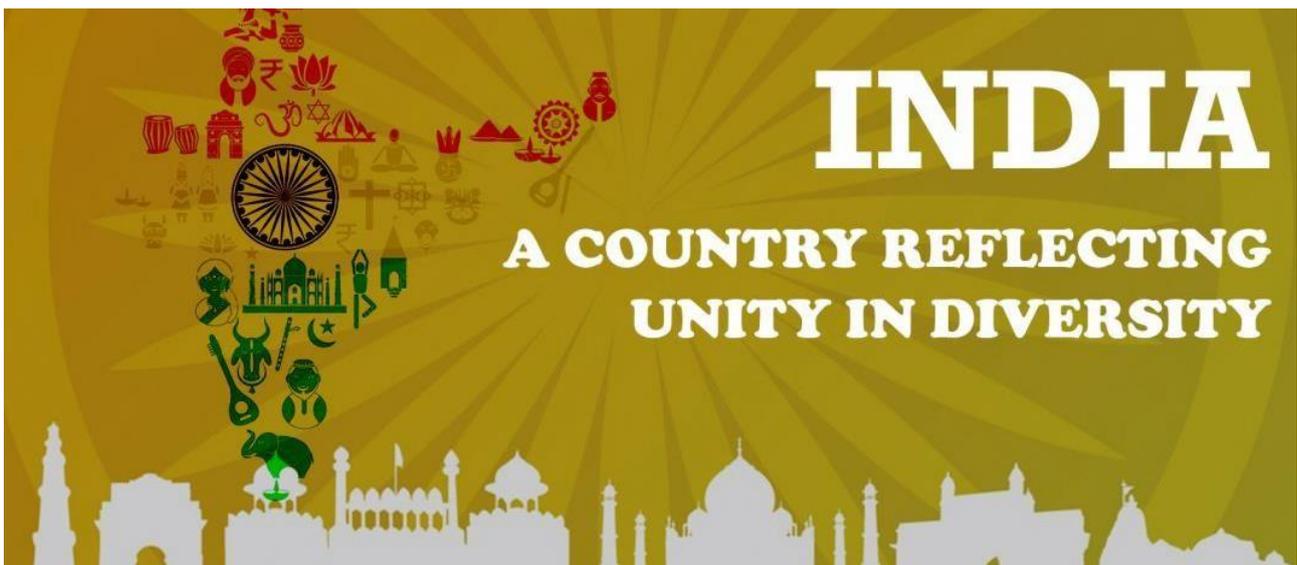
THE MANY MEANINGS OF DIVERSITY IN INDIA

Urbanisation and wealth

India's mega-cities may be vast, but approximately 67% of the population still live in rural areas. These tend to have higher rates of poverty and lower rates of literacy (in Bihar, for example, the literacy rate was just 64% in 2011). In fact, the richest 1% of Indians owned 51.5% of the country's wealth in 2018. Differing levels of education and income in urban and rural areas result in Indian citizens having extremely different life experiences, needs and expectations. Companies must tailor their products and messaging to the target audience if they want to avoid wasting their advertising budget. Marketers need to be aware of the many markets in India that can be addressed at various price points. This is a great opportunity as long as companies understand their audiences.

Castes

Over 3,000 years old, castes divide Hindus (80% of the population) into hierarchies based on karma (work) and dharma (duty). Out of the castes were the Dalits ('the untouchables'). This system has shaped Hindu life and stratified social groups. In recent decades, urbanisation and social justice groups have made a massive difference in challenging the caste system. Misinterpretation or misunderstanding of the societal hierarchy could be detrimental to foreign brands.



DIVERSITY



HOW BRANDS GO ABOUT IT

“Removing the Stains of Social Inequality”

Ariel is an international laundry detergent brand owned by Procter & Gamble. In 2015, the company launched the first version of a series of campaigns addressing the issue of gender equality. Laundry is still seen as a woman’s work in 95% of Indian homes, despite the fact that modern Indian women are more likely to be educated and have professional commitments than previous generations. Ariel’s campaign (a television advert coupled with the hashtag #ShareTheLoad) sparked a national conversation and is estimated to have boosted sales by 76%. It won “Campaign of the Year” at the 2016 M&M Global Awards.

<http://bit.ly/2NpZb42>



#ShareTheLoad

“A Tale of Two Blends”

Red Tea Label released an advert in 2018, using the product as a means for people of all different backgrounds in India to chat, connect, and enjoy a cup of tea together. By creating an experiment in which real consumers tasted two blends of tea and chose their favourite, Red Tea Label demonstrated that sharing a cup of tea can be a means of connecting no matter your background.

<http://bit.ly//2NqwkmO>



“Ready for life”

In 2016, Surf excel (a Unilever laundry detergent brand) launched its #ReadyForLife campaign to encourage children to share with their less fortunate peers. In the ad, a mother tells the viewer how her young son lent his brand new football boots to a friend who could not afford any. At the end, on-screen text and a voiceover say, “Surf excel believes sharing helps kids get ready for life. Encourage your kids to share.”

<http://bit.ly/2P8Zx1u>



These brands use everyday situations in Indian culture to build a rapport between the brand and the consumers while simultaneously associating themselves with values of social progress, diversity and unity. The diversity of Indian society is a backdrop against which brands can define their values and demonstrate their devotion to positive change, not just for their brand but for Indians overall.



CONCLUSION

If you are thinking of trying to break into the Indian market, the good news is that the country's consumer classes are immense and rapidly growing. Thanks to urbanisation and economic development in recent decades in India, the advertising market is a thriving one. However, without an awareness of Indian culture, brands run the risk of lacking local relevance.

Climate change affects public health, especially in terms of its impact on air pollution and access to clean water. Brands that understand this context will be able to connect with Indian viewers who have lived through these experiences. Additionally, when brands understand that there are a multitude of Indian identities, they can create successful campaigns that tap into local experiences and emotions on a national scale.

Brands must bear all of this in mind when devising strategies. This could involve tailoring advertising methods and messaging to particular consumer segments or – like the brands in our case studies – using the country's diversity as a vehicle through which to familiarise consumers with the brand's core values. Promoting the guiding principles behind a brand's identity is one reason why a company might decide to engage with the issue of sustainability. Challenges such as climate change and resource scarcity threaten both companies and individuals, so taking steps to address them (and to explain these efforts to prospective customers) offers the benefits of being good for the planet and good for a brand's reputation.



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