NPAFInc

Unlocking the Energy Market

This Presentation

- Defines our perspective and approach
- Strategic blueprint Vs Communication plan

INTENTION : DEMONSTRATE OUR CAPABILITY
IN UNDERSTANDING ISSUES AND DEFINING SOLUTIONS

Basis

- The Brief
- Primary Research
  - Consumer Focus Groups in Mumbai
- Secondary Data

The Brief

- NPAFInc to launch a new hormone supplement, DHEA, for the first time in the Indian market

- Need a comprehensive communication plan for both the OTC as well as the Prescription markets

The Product

An extract of Shilajit that helps release DHEA in the human body.

- To be launched in capsule form
- Priced at Rs…..per capsule

What is DHEA?

- Generic product name: DHEA (Dehydropiandrosterone)
- A vital hormone in human body
  - ‘Mother hormone’ that helps release other critical hormones
  - Gets gradually depleted after the age of 30

How does the depletion of DHEA affect the human body?

- DHEA deficiency can lead to ailments like
  - Cancer
  - Diabetes
  - Hypertension
  - Clogging of arteries
  - Osteoporosis
- It can also lead to a general *lack of energy* and *depression*

Key Strategic Issues

- Target Audience Definition
- Branding
- Communication Strategy
- Brand Imagery
- Packaging
- Collateral Marketing Efforts
- Doctor Detailing
- Role of Media

Target Audience

- The Prescription Market
  - Doctors
  - Chemists
- The OTC Market
  - Men and Women, SEC AB, 30+
  - Chemists

KEY ISSUE : A SINGLE BRAND FOR BOTH AUDIENCES OR DIFFERENT BRANDS CATERING TO DIFFERENT AUDIENCES?

The Issue of Branding

Option 1

- Different and distinct brand names for the OTC market and the Prescription market

Option 2

- The same brand name with different product descriptors for the OTC market and the Prescription market

Q: WILL DOCTORS PRESCRIBE A VISIBLY OTC PRODUCT?

Doctors' Attitude Towards OTC Products

- Doctors under pressure to be seen as specialists and provide additional 'value' to patients
- Will not prescribe visibly OTC brands

NEED FOR CLEARLY DIFFERENTIATED OTC AND RX PRODUCTS

The OTC Market

The Healthcare Environment

The Healthcare Environment

- Health risks due to modern lifestyles, pollution etc. perceived to be high
- Stress and stress related illnesses on the rise
- Food consumed not perceived to be as nutritious
- Self medication in the form of ‘food’, ‘age’ and ‘health’ supplements on the rise
- Growing awareness that ‘good health’ is achievable through slower, long-term measures

LARGE RELIANCE ON ALLOPATHY AND ‘MODERN MEDICINE’

Consumer Attitudes Towards Preventive Healthcare

The General Attitude

- *"If it ain't broke, don't fix it"*
- *"It won't happen to me"*
- *"The doctor knows best (and so do I)"*
- *"There is nothing wrong with me"*

REACTIVE, CURATIVE ATTITUDE TO HEALTHCARE

The 'Health Aware' Attitude

- *"I need to stay in shape"*
- *"I need to control my diet and watch what I eat"*
- *"As I grow older, vitamins and health supplements are important"*

MAINTENANCE OF HEALTH IS A PRIORITY

The Marketing Environment

The Marketing Environment

International markets

- Market size of $ 6 billion per annum in US
- Sold as an OTC product in the US
- 4000 companies promote DHEA across the world

Indian market

- Alembic is the first company to market DHEA in India
- Key competitive products in the Indian market :
  - Anti-oxidants
  - Stress relievers
  - Age/Health supplements
  - Performance supplements

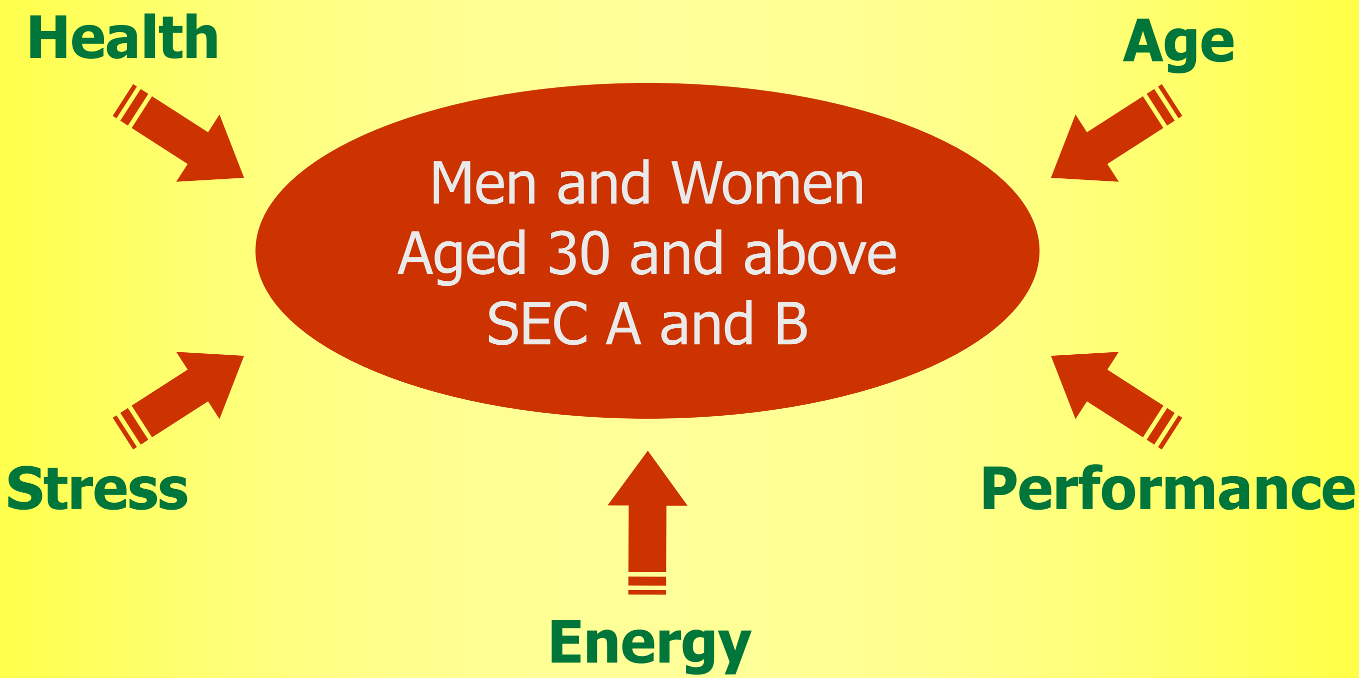
The Competitive Environment

- Key competitive products in the Indian market :
  - Anti-oxidants like 'Antioxid' and 'EC-350'
  - Stress relievers like 'Stresscom'
  - Health/Food supplements like 'Chyawanprash' and 'Sunova Spirulina'
  - Rejuvenators like '30+'
  - 'Ginseng' and other sexual performance enhancer based products

The Competitive Environment

- Clear differentiation between 'Natural/Ayurvedic' and 'Allopathic' products
- Broad, differentiated product drivers :
  - *Health*
  - *Stress*
  - *Performance*
  - *Age*
  - *Energy*
- No single dominant player in the market
- Low brand visibility at retail

Target Audience : Product Trigger



CRITICAL TO FIND THE MOST POTENT TRIGGER

Need to Assess

- Consumer attitude and behavior with respect to preventive healthcare

- Consumer perceptions of ‘supplements’
  - *By need* **:** Health, Age, Stress, Performance, Energy etc.
  - *By product type* **:** Allopathic, Hormonal, Ayurvedic, Natural, Herbal, Mineral etc.

- Consumer perceptions of competitive products, and communication

Consumer Research

Four Focus Group Discussions in Mumbai

Men : Aged 35-40, SEC A

Men : Aged 40-45, SEC B

Women : Aged 35-40, SEC A

Women : Aged 40-45, SEC B

Reactions to

Competitive Communication

Reactions to competitive communication

- **Chyawanprash**
  - Heritage value lends to credibility
    "Its what we grew up with. An age old remedy handed down over generations"
  - Not perceived as 'Medication' but as a part of the daily diet
    "It is good for skin and hair growth and since it is Ayurvedic it has no side effects"
  - Works as a 'Preventive'
    "It keeps my children healthy. It strengthens their constitution and protects them against common ailments"

Reactions to

competitive communication

- **30+**
  - Seen as some form of a stimulator / aphrodisiac
    "Not sure what it does… maybe like 303 or something"
  - Age cue of '30' suggests need for supplement
    "As we grow older we need something extra…"

Reactions to

competitive communication

- **Sunova Spirulina**
  - Seen as a substitute to food, not a complement to it
    "If this is as good as a plate of food, I'd rather have the food"
  - No perceived benefits. Expensive
    "I tried it but it didn't make me feel any better"
  - Credibility issue on 'food' claim
    "I don't think a pill can be as good as a full meal"
    "After I had it, I was still hungry. I didn't feel like I'd had any nourishment at all"

Reactions to competitive communication

Dabur Stresscom

- Stress claim not believable
  "Let's be realistic. A pill is not going to relieve my stress"
- The remedy for stress is sleep, exercise etc. Not medication
  "It's all psychological. A pill is not going to relieve my stress"
- Side effects and dependency a concern
  "I thought of using it but I was scared of side-effects and long term dependency"
- Believed to have a 'placebo' effect
  "It's all psychological"

Learnings

- Four key categories perceived
  - ‘Chyawanprash’ and similar ‘natural’ formulations
    - Includes vitamins or other ‘harmless’ health supplements
  - Vitality supplement for adults for performance
  - Food and energy supplements
  - Stress relievers
- Each category offers clear and distinct benefits
  - *However, most suffer from a lack of credibility*

NEED A RELEVANT AND CREDIBLE PROPOSITION FOR DHEA

Concept Tests for DHEA

Concept Tests

- Five concepts tested for :
  - Consumer reactions to core triggers
    - Health, Stress, Age, Performance and Energy
  - Consumer reactions to ‘supplement’ descriptors
    - Natural/Ayurvedic, Mineral and Hormonal

Concept 1 (Health)

"One capsule a day keeps the doctor away"

Support :

Brand X keeps you healthy 365 days a year. It helps release vital body system enhancers that prevent diseases like cancer, diabetes, hypertension and osteoporosis.

Brand X. Keeps you healthy, year after year.

Consumer Reactions

Men

- *"That's too much for me to believe."*
- *"It is too general."*
- *"What exactly will it do?" "Nothing is wrong with me."*
- *"How can it work for everything?"*
- *"If this was true, all doctors would prescribe it."*

Women

- *"It sounds like an easy way to stay healthy… but its hard to believe."*
- *"It will help build resistance"*
- *"How can it be natural and yet in a capsule?"*
- *"Cancer, diabetes, heart problems… that's too much. One capsule can't do everything."*

CREDIBILITY IS AN ISSUE

Concept 2 (Stress)

"Brand X keeps you calm and relaxed throughout the day"

Support :

Brand X acts as a de-stressor and helps relieve tension.

Brand X. Helps relieve stress.

Consumer Reactions

Men

- *"What are the side effects?"*
- *"I'd have to study the contents carefully before I tried something like that."*
- *"I don't think it will work unless its messing with my nerves or something… and that's dangerous."*
- *"Stress is situation specific, you cant just take a pill for it."*

Women

- *"Yoga or a morning walk would be better for this kind of thing."*
- *"Sleep is a better solution for stress."*
- *"Is it a sedative?"*
- *"It's all psychological. A pill won't help."*
- *"What are the ingredients?"*

STRESS IS A PERSONAL, PSYCHOLOGICAL ISSUE

Concept 3 (Age)

"Life begins after 40"

Support :

Brand X strengthens your body's immune system and helps build lean body mass keeping you youthful and healthy year after year.

Brand X. Keeps you healthy and active, even after 40.

Consumer Reactions

Men

- *"But what does the product actually do… it sounds too general"*
- *"When we are young, we are rough and tough… after 40/50 we have to take care"*
- *"It is the most crucial stage of your life… you have to take extra care"*

Women

- *"Is it like 30+ or one of those things?"*
- *"40 is the right age… your body needs something extra after 40"*
- *"Only those above 40 will think about it… if you are 35, you will wait till 40…"*

'AGE' HOOK WORKS BUT OVERSHADOWS ALL OTHER MESSAGES

Concept 4 (Strength)

"One capsule of Brand X a day, gives you the strength to take on life day after day after day"

Support :

Brand X helps release vital body system enhancers and build lean body mass, giving you the strength you need to live life to the fullest.

Brand X. Gives you extra strength.

Consumer Reactions

Men

- *"Is it like a steroid?"*
- *"Something like that would definitely have side-effects."*
- *"It is very exaggerated"*
- *"It can not really make me stronger"*

Women

- *"Is it addictive?"*
- *"Will it really work?"*
- *"That sounds good for my husband"*
- *"I'm not looking for strength"*

NEGATIVE 'STEROID' PERCEPTIONS

Concept 5 (Energy)

"With Brand X you now have the energy to stay ahead all day"

Support :

Brand X helps release vital body system enhancers and gives your body all the energy it needs.

Brand X. Keeps you going all day long.

Consumer reactions

Men

- *"If I could feel as energetic as I did 5 years ago, that would be really great"*
- *"What about side-effects?"*
- *"If it is natural, there will not be any side-effects"*
- *"Will definitely give it a try after checking the ingredients"*

Women

- *"Will it really work?"*
- *"My children have enough energy, but it might be good for my husband or for me"*
- *"How effective is it?"*
- *"Even regular, good food does not give adequate energy"*

ENERGY CLEARLY A CREDIBLE AND RELEVANT BENEFIT

Key Insights

- *"I don't have as much energy as I did 5 years ago"*
- *"You can be healthy and still not have enough energy"*
- *"If I had more energy, I would not feel the stress of life"*

Obvious

- ***Energy*** is the most relevant and credible benefit
- Ingredient support critical
  - *Need to evaluate alternative ingredient support propositions*

Reactions to Ingredients/Descriptors

	Natural/Ayurvedic Supplement	**Mineral Supplement**	**Hormonal Supplement**
Composition	➢ Herbs, Fruits, Nuts, Minerals...	➢ Crushed minerals ➢ Natural	➢ Steroids/Adrenalin ➢ Allopathic
Speed	➢ Easy to absorb ➢ Slow acting	➢ Slow like all Ayurvedic medicines	➢ Faster than natural or mineral
Effectiveness	➢ Effective in long term	➢ Effective in long term ➢ Gives strength	➢ Short term ➢ Sets the hormonal balance right
Side effects	➢ None	➢ None	➢ Very likely ➢ Need to consult doctor

‘MINERAL’ TAKES ALL THE POSITIVES OF ‘NATURAL’.
‘HORMONAL’ SEEN AS SHORT TERM WITH SIDE-EFFECTS.

The Recommended Concept

Concept 5 (Energy)

"With Brand X you now have the energy to stay ahead all day"

Support :

Brand X contains Shilajit, a natural mineral, that helps release vital body system enhancers and gives your body all the energy it needs.

Brand X. Keeps you going all day long.

The Brand Name

Short-listed Brand Names

- ***VITALMIN***
- ***RECHARGE***
- ***e24***
- ***ELIXIR***
- ***E-CHARGE***
- ***REVV***
- ***VITALISE***
- ***E-VIVE***

Recommended Brand Name

E-CHARGE

RATIONALE : CONTEMPORARY, ENERGETIC AND EVOCATIVE

Strategic Recommendation 1 : Positioning

E-CHARGE gives you the energy to stay ahead.

It contains Shilajit, a natural mineral, that helps release vital body system enhancers and gives your body all the energy it needs, all day long.

Brand Dimensions

E-CHARGE

- Moves you from coping to *energizing*
- Keeps you going all day long
- Makes you feel as energetic as you did 5 years ago
- Enables you to live life fully
- Adds back what today's lifestyle takes away from you
- Is not a *'miracle medicine'* nor does it *'reverse aging'*

Strategic Recommendation 2 : Communication Strategy

Objective

- To make ***E-CHARGE*** synonymous with a ***ENERGY***

Strategy

- Project it as a natural, mineral formulation that gives the body all the energy it needs
  - Reduces the safety assurances required
  - Leverages the attributes of 'Shilajit'
  - Enables retail stocking with 'energy' products

Strategic Recommendation 3 : Packaging

Objective

- To be perceived as a modern non-medicinal ***ENERGY*** booster

Strategy

- Modern styling and an innovative, ‘energetic’ packaging form
- Packaging colours and graphics to connote ***ENERGY*** and FMCG
- Clear assurance on natural mineral ingredients through the descriptor and ingredients
- Smaller sized sampler packs to generate trial

Creative

Strategic Recommendation 4 :
Pharma Programme

Objective :

- To create excitement about the new formulation
- To induce greater endorsement

Strategy :

- Chemist meets to inform them about ***E-CHARGE***
- Take-Ones and Posters at retail outlets
- Innovative high impact dispensers

Strategic Recommendation 5 : Consumer Contact

Objective

- To make ***E-CHARGE*** synonymous with a ***ENERGY***

Strategy

- Build visibility and consumer contact at *high-energy* venues like Health Clubs, Gymnasiums and Walking tracks
  - Innovative Posters and Product Dispensers at the venue
  - Special 'Talks' on staying healthy and energetic
- *High-energy* cross promotions
  - OnJus free with every ***E-CHARGE***
  - ***E-CHARGE*** free with every gym membership

The Dynamics of Image

E-CHARGE

- Campaign
- Packaging
- Collaterals
- Pharma Programme
- Consumer Contact

ENERGY

The Prescription Market

Doctors' Attitude Towards Preventive Healthcare

- Operate in the same reactive/curative environment as consumers
- Preventive healthcare measures generally prescribed :
  - Regular exercise
  - Diet control
  - Vitamin and calcium supplements
- Hesitant to prescribe preventive healthcare 'medication'
- Need assurance about efficacy and minimal side effects

NEED TO PROJECT DHEA AS SOMETHING CLEARLY DISTINCT FROM BASIC HEALTH SUPPLEMENTS

Doctors' Attitude Towards DHEA and Vitalmin

- Doctors aware about the hormone and its criticality
- Not aware about its international presence as a Prescriptive and OTC drug
- Doctors skeptical about prescribing ***VITALMIN*** initially
  - Would wait for reactions of the Indian doctor fraternity
- Hesitant to prescribe if its available through OTC route
  - However, will recommend if they are convinced about ***VITALMIN's*** efficacy and 'zero' side-effects

ENDORSEMENT OF MEDICAL FRATERNITY CRITICAL

Doctors' reaction to communication approach

Concept 1

- **A revolutionary hormone supplement. Now in India.**
  - Revolutions in international markets may not necessarily succeed locally
  - Such claims highlight only the positives
  - Local medical fraternity must accept it

Concept 2

- **Introducing Vitalmin. The best defence against most critical ailments.**
  - Talks about believable facts
  - Would want to know more about it
  - Would seek advice and on it from rest of the medical fraternity

CONCEPT 2 GENERATES GREATER INTEREST

Different Brands
for Different Audiences

DHEA

E-CHARGE

OTC Product

Targeted at
Men & Women
SEC AB, Age 30+

VITALMIN

Prescription Product

Targeted at Doctors

TREAT THEM AS DIFFERENT AND DISTINCT BRANDS

Strategic Recommendation 1 : Communication Strategy

Objective

- To position ***VITALMIN*** as an effective hormonal supplement, critical for patients over the age of 30

Strategy

- Project it as a safe catalyst for the release of DHEA, a vital hormone, thus preventing the occurrence of ailments like :
  - Cancer, Diabetes, Hypertension, Osteoporosis and clogging of arteries

Strategic Recommendation 2 : Packaging

Objective

- To build ‘prescriptive’ and ‘efficacious’ imagery

Strategy

- Rx packaging format
- Packaging colours and graphics serious, non-FMCG
- Clearly communicate ‘hormonal’ supplement

Creative

Doctor Relationship Management Programme

DRM Programme

Clinical Product Trials

- Invite doctors to participate in clinical trials for ***VITALMIN***
  - Offer free samples to doctors who agree to join the trial
  - Doctors to prescribe the capsules to their patients
  - Doctors to fill out a feedback form rating ***VITALMIN*** on
    - Effectiveness, Change in overall health, Side effects (if any)
  - Collect feedback forms after a month and offer a gift
- Analyze and compile the findings of the research
  - Have it published in a medical journal
  - Medical representatives to visit doctors with research report

DRM Programme

Doctor Seminars

- Invite doctors for a seminar on ***VITALMIN*** and *'new possibilities'* for health maintenance after 30
- Organise the seminar in a health resort to create synergy with core values of ***VITALMIN***

Viral Marketing

- Innovative e-mails to doctors
- E-mails can be in the form of simple games developed around the idea of *'staying healthy after 30'*

Summary

- Need clearly differentiated products for the OTC and the Prescription markets
- *Energy* benefit clearly the most appealing and credible for the OTC consumer
  - Natural/Mineral support provides a safety assurance
- Need a more 'medicinal' approach for Doctors
  - Helps prevent Cancer, Diabetes, Hypertension, Osteoporosis and clogging of arteries

The Research Plan

Pre-test communication concepts through qualitative research

↓

Finalise the positioning route

↓

Develop the communication mix

↓

Develop STM and price sensitivity modules

↓

Test the communication on STM and price sensitivity modules

↓

Analyze results
Input into brand investment plan for the next 3 years

Other Areas Where

The Agency Can Act As

A Marketing Partner

The Marketing Planning Process

Preplanning Requirements

Identify Product/Markets
Determine Management's Expectations
Establish Objectives

The Marketing Planning Process

Preplanning Requirements

Situation Analysis

Identify Market Needs
Analyze Competition
Identify Markets, Segments,
Size & Share
Identify Outside Influences
Analyze Distribution
Analyze Market Coverage
Analyze Product Pricing
Evaluate Marketing Communications
Analyze Positioning

The Marketing Planning Process

- Preplanning Requirements
- Situation Analysis
- **Problems and Opportunities**

Determine Marketing Success Factors
Identify Key Problems and Opportunities

The Marketing Planning Process

Preplanning Requirements

Situation Analysis

Problems and Opportunities

Segment Priority

Determine Segment Priority
Establish Business Direction by Segment
Establish Objectives by Segment
List Assumptions and Restrictions

The Marketing Planning Process

- Preplanning Requirements
- Situation Analysis
- Problems and Opportunities
- Segment Priority
- **Strategies and Tactics**

Develop Strategy Options
Select Strategies
Develop Tactics
Schedule and Budget Tactics

The Marketing Planning Process

- Preplanning Requirements
- Situation Analysis
- Problems and Opportunities
- Segment Priority
- Strategies and Tactics
- **Marketing Plan**

Estimate Sales and Costs
Prepare Trial P & L

The Marketing Planning Process

Preplanning Requirements

Situation Analysis

Problems and Opportunities

Segment Priority

Strategies and Tactics

Marketing Plan

Control and Measurements

Establish Controls and Measurements

Media

Media Task

- Need to identify test markets
- Roll out activity

The Consumer

- Demographics
  - Male & Female
  - SEC A & B
  - 35 to 60 years

The Consumer

- Psychographics
  - Hectic/Active lifestyle
  - Demanding routine
  - Health conscious
  - With a positive disposition towards supplements
  - those who can afford to pay for such supplements

"Health conscious and looking for ways to stay healthy"

Target Markets

- Need to identify potential markets for test launch and subsequent roll-out activity
- Profiling
  - Lifestyle parameters
  - Media efficacy

Profiling Markets

At Pop Strata level

			Internet	Credit Cards	Mobile Phones	Internet	Credit Cards	Mobile Phones
		%	%	%	%			
Base Pop '000	193784	100	2.1	0.7	0.6		Index	
Top 8 Metros	49554	26	52	72	57	**204**	**282**	**222**
Oth 10 Lakh+	21324	11	12	11	15	**111**	**99**	**135**
5-10 Lakhs	17355	9	7	4	6	82	42	71
1-5 Lakhs	42351	22	18	6	15	82	28	68
Below 1 Lakh	63199	33	10	7	7	31	21	21

Life style parameters indicate a higher presence in the Top 8 metros and the other 10 Lakh+ towns

Source : NRS 01

Exploring the 8 metros and 10L+ Towns

	Base Pop		Internet	Credit Card	Mobile Phone
	('000)		%	%	%
	193784	%	2.1	0.7	0.6
Mumbai	12467	6.4	13.1	18.2	20.9
Delhi	8262	4.3	12.1	20.4	17.7
Hyderabad	4708	2.4	8.3	8	3.7
Bangalore	3902	2	5.6	7	3.1
Chennai	5190	2.7	4.9	5.9	3.3
Pune	2347	1.2	4	3.7	1.9
Kolkata	9620	5	3.4	7.9	4.9
Kochi	1440	0.7	1.5	1.4	2.2
Lucknow	1859	1	1.3	1.1	1.4
Coimbatore	1014	0.5	1.1	1.2	1.2
Madurai	975	0.5	1	0.2	0.7
Nagpur	1566	0.8	1	0.9	0.8
Ahmadabad	3118	1.6	0.9	1.8	1.6
Vizag	1112	0.6	0.9	1	0.6
Bhopal	1109	0.6	0.8	0.7	0.7
Indore	980	0.5	0.7	0.6	1.3
Jaipur	1470	0.8	0.7	0.7	1.2
Vadodara	1083	0.6	0.5	1.3	0.4
Total			**62**	**82**	**68**

Cluster 1

Cluster 2

Cluster 3

Test Markets

- Exploring the clusters to identify two test markets
  - Media fragmentation
  - Media entry costs
  - Feasibility based on marketing logistics

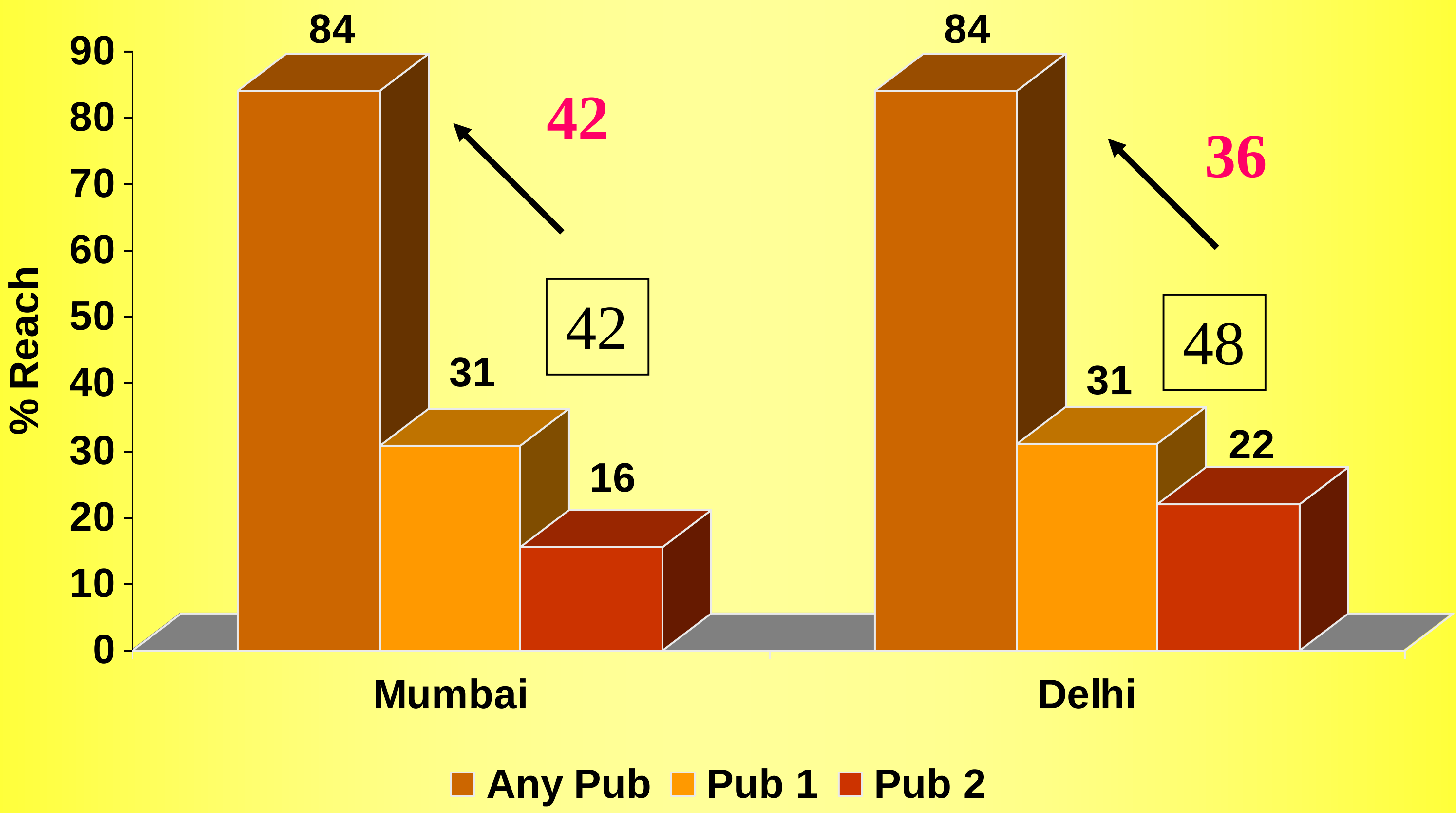
- Media at the stage of Test markets limited to
  - Press - local medium

Media Fragmentation

- Extent of media fragmentation
  - Analyzing markets by determining the reach potential of publications
  - Taking the top two reach maximizing publications per center and determining the differential from the total press reach

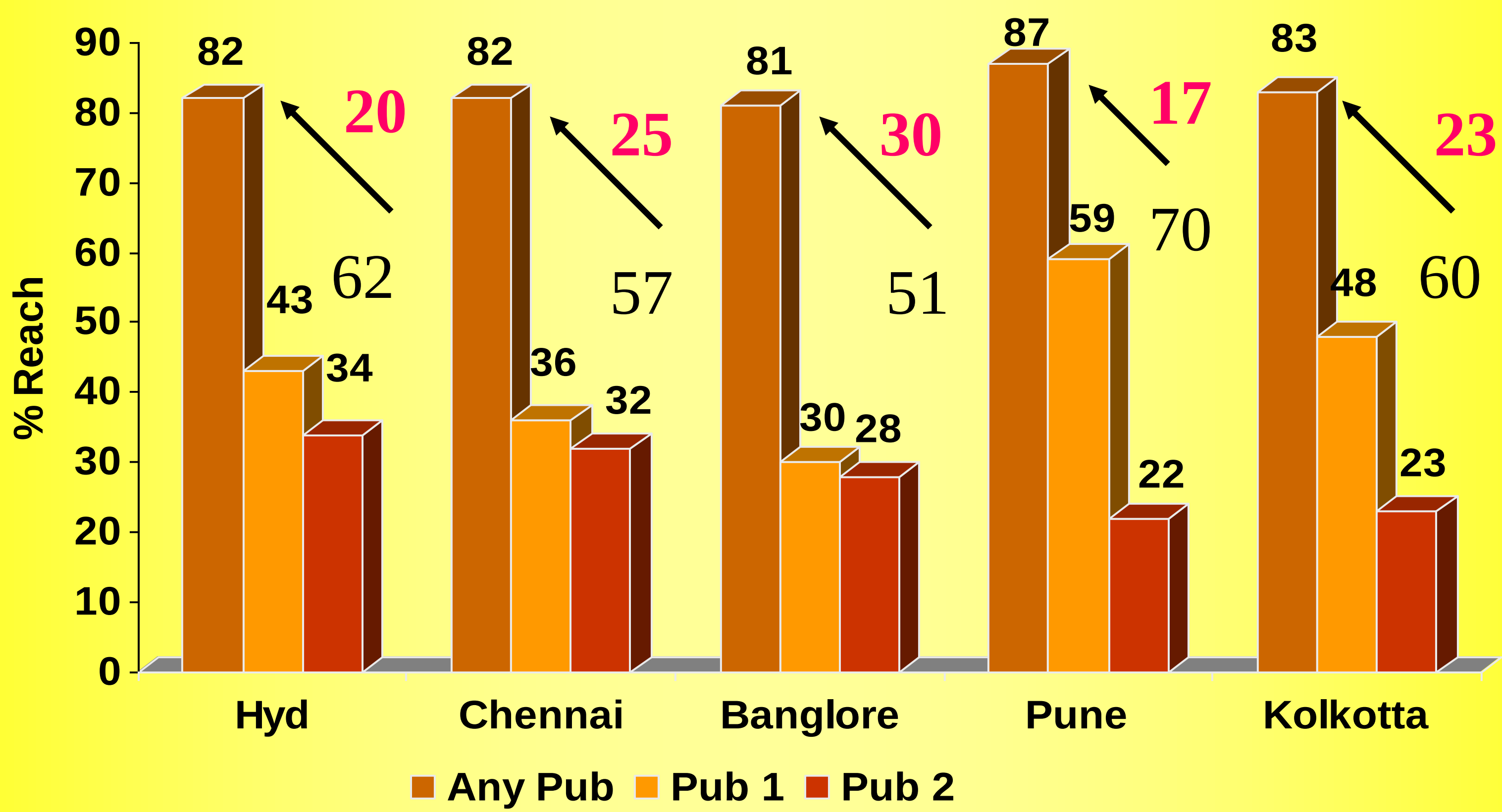
Media Fragmentation

~ Cluster 1 ~



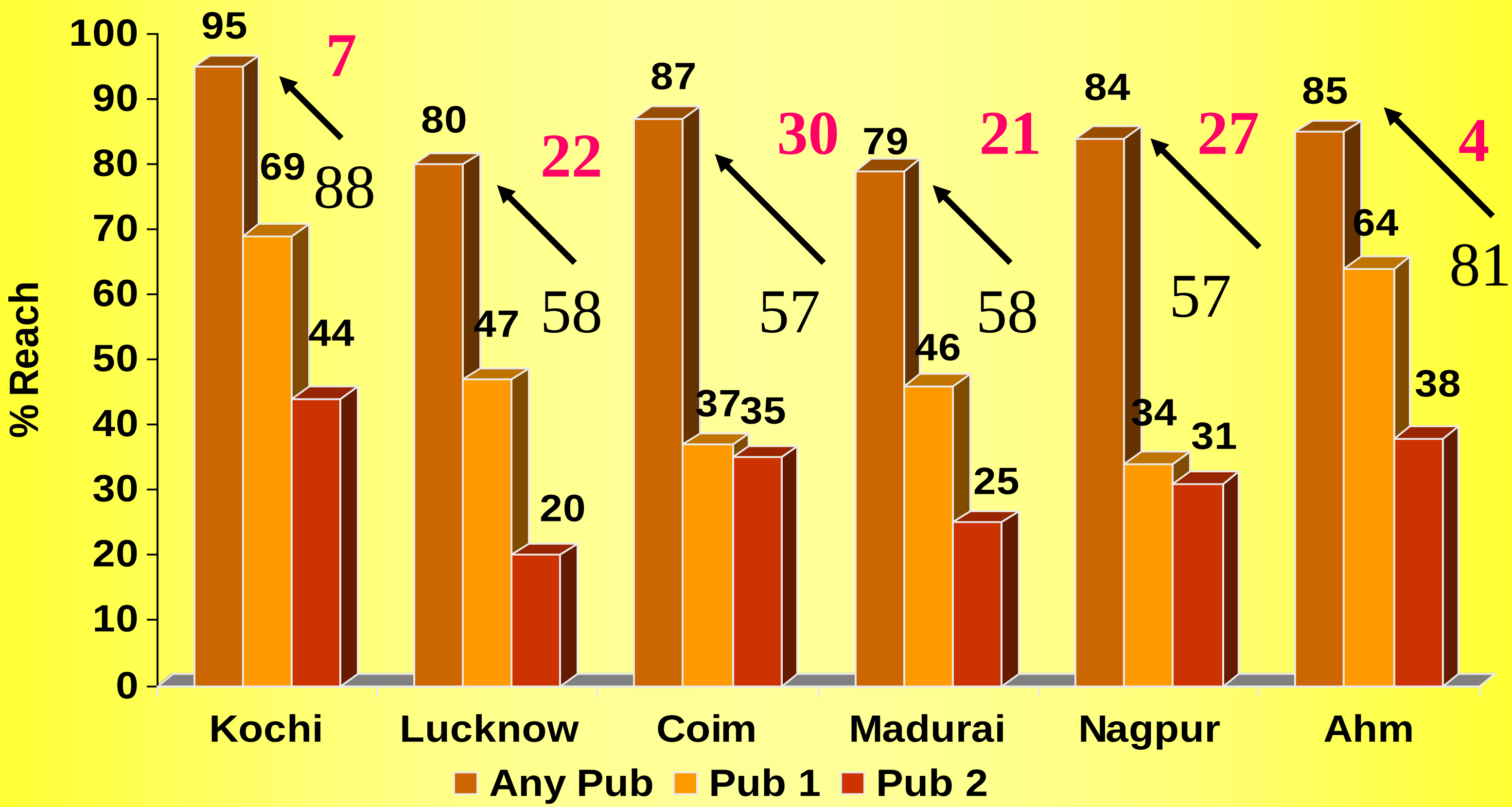
Media Fragmentation

~ Cluster 2 ~



Media Fragmentation

~ Cluster 3 ~



Media Entry costs

- Threshold entry cost per market
  - Cost of media per market
  - Cost per Reach across markets

Media cost per market

Cluster	City	Publication	Rate/cc	Rate Index
Cluster 1	Mumbai	Times Of India	4950	1238
	Delhi	Hindustan Times	3100	775
Cluster 2	H'bad	Eenadu	900	225
	B'lore	Deccan Herald	1500	375
	Chennai	Daily Thanti	1000	250
	Pune	Sakal	1650	413
	Kolkata	ABP	3660	915
Cluster 3	Kochi	Malyalam Mano.	775	194
	Lucknow	Dainik Jagran	918	230
	Coimbatore	Hindu	400	100
	Madurai	Dinamalar	440	110
	Nagpur	Lokmat	600	150
	A'bad	Guj Samachar	1500	375

Cost per reach across markets

- Analyzing the markets based on lowest cost per reach
  - Setting a 60% reach/market target and determining the subsequent cost for achieving the reach

Test Markets

Criteria	Cluster	Centers
Media Fragmentation	Cluster 3	Ahmedabad, Kochi
Media Entry Costs	Cluster 3	Ahmedabad, Kochi, Lucknow,
		Nagpur, Madurai, Coimbatore
	Cluster 2	Pune, Hyderabad
Marketing Logistics	Cluster 3	Ahmedabad

CHOICE OF TEST MARKETS **: MARKET 1 : AHMEDABAD**
MARKET 2 : HYDERABAD

Test Market Plan

- Print & Outdoor to be the key mediums
- Rapid reach build up through dailies
- Leverage " Innovations" points through tactical
  - Print & outdoor
  - Bus panels
  - 52x1 cc in dailies

- Period : 4 weeks

Plan & Cost

Market	Publication	150 CC	60 CC	40 CC	Total	Total
		Col	Col	B/W	Ins	Cost
Hyderabad	Eenadu	2	2	2	6	414000
	Deccan Chronicle	2	2	2	6	536400
Ahmedabad	Gujarat Samachar	2	2	2	6	697200
	Times of India	2	2	2	6	434000
Total		8	8	8	24	2081600

Plan Performance

Market	GRP's	Reach	OTS
Ahmedabad	459	74	6
Hyderabad	463	75	6

Roll-out Plan

- Markets - 18 metros and mini-metros based on 60-80% contribution of usage of lifestyle variables

Roll Out Markets

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Lucknow	1859	1	1.3	1.1	1.4
Coimbatore	1014	0.5	1.1	1.2	1.2
Madurai	975	0.5	1	0.2	0.7
Nagpur	1566	0.8	1	0.9	0.8
Ahmadabad	3118	1.6	0.9	1.8	1.6
Vizag	1112	0.6	0.9	1	0.6
Bhopal	1109	0.6	0.8	0.7	0.7
Indore	980	0.5	0.7	0.6	1.3
Jaipur	1470	0.8	0.7	0.7	1.2
Vadodara	1083	0.6	0.5	1.3	0.4
Total			**62**	**82**	**68**

Cluster 1

Cluster 2

Cluster 3

Media Objective

- Optimal media mix through multi-media activity
- Extend “Innovation” points across markets

Media Strategy for Roll-out

- Print as the lead medium
  - Information
  - Clutter-breaking innovative formats
  - Smaller formats for sustenance
- Television as a support medium
  - Cost-effective incremental reach
- Outdoor as a reminder medium
  - "Innovative" communication at vantage points

Media Approach - Print

- The selection of publications
  - Publications with high incremental reach
  - Combination costs for publication groups across markets
- Duration of Activity : 16 weeks

Print Plan Option - Dailies

Market	Publications	150 CC	60 CC	40 CC	Total	Total
		Col	B/W	B/W	Ins	Cost
Mumbai	Times of India	2	3	4	9	
	Mid-Day	2	4		6	
Pune	Times of India	4			4	
Nagpur	Lokmat	2	3	4	9	
	Navabharat	2	3	4	9	
Delhi	Hindustan Times	2	3	4	9	
	Navbharat Times	2	3	4	9	
Bangalore	Times of India	2	3	4	9	
	Prajavani	2	3	4	9	
Hyderabad	Eenadu	2	3	4	9	
	Deccan Chronicle	2	3	4	9	
All South	Hindu	2	3	4	9	
Chen,Coim & Madu	Daily Thanthi	2	3	4	9	
Kochi	Malyala Manorama	2	3	4	9	
Ahmedabad	Gujarat Samachar	2	3	4	9	
	Times of India	2	3	4	9	
Luckhnow	Dainik Jagaran	2	3	4	9	
Kolkatta	Anand Bazar Patrika	2	3	4	9	
	Telegraph	2	3	4	9	
Total		40	55	68	163	15522150

Print Plan Option - Magazines

Publication	Lang/Fr	Rate FPC	# Ins	Total Cost
India Today	E/W	480000	7	3360000
Outlook	E/W	290000	7	2030000
Week	E/W	125000	7	875000
Reader's Digest	E/M	291500	3	874500
Filmfare	E/M	140000	3	420000
Femina	E/F	225000	4	900000
Stardust	E/M	238000	3	714000
India Today	H/W	280000	7	1960000
Business India	Eng/W	193000	4	772000
India Today	Tlg/W	60000	7	420000
Desh	B/F	85000	4	340000
Kumudum	Tml/W	89700	7	627900
Chitralekha	Guj/W	172500	7	1207500
Taranga	K/W	40000	7	280000
Chitralekha	M/W	108000	7	756000
India Today	Ml/W	60000	7	420000
Total			**91**	**15956900**

Plan Performance - Magazine

Market	GRP's	Reach	OTS
Mum & Pun	250	41	6
Nagpur	154	23	7
Delhi	360	44	8
Bangalore	474	50	10
Hyderabad	334	43	8
Ahmedabad	116	26	5
Kolkatta	123	27	5
Luckhnow	262	49	5
Chennai,Coim,Mad	321	44	7
Kochi	447	47	10

Plan options

Dailies vs Magazines

Dailies

- Penetrative coverage
- Low levels of sustenance (weeks of activity)

Magazines

- Higher sustenance can be achieved
- Focussed targeting & environment

Print Plan - Dailies + Magazines : 1

Market	Publications	150 CC	60 CC	40 CC	Total
		Col	B/W	B/W	Ins
Mumbai	Times of India	2	3	4	9
	Mid-Day	2	4		6
Pune	Times of India	4			4
Nagpur	Lokmat	2	3	4	9
	Navabharat	2	3	4	9
Delhi	Hindustan Times	2	3	4	9
	Navbharat Times	2	3	4	9
Bangalore	Times of India	2	3	4	9
	Prajavani	2	3	4	9
Hyderabad	Eenadu	2	3	4	9
	Deccan Chronicle	2	3	4	9

Print Plan - Dailies + Magazine : 2

Market	Publications	150 CC	60 CC	40 CC	FPC	Total	Total
		Col	B/W	B/W		Ins	Cost
All South	Hindu	2	3	4		9	
Chennai, Coim,							
Madurai	Daily Thanthi	2	3	4		9	
Kochi	Malyala Manorama	2	3	4		9	
Ahmedabad	Gujarat Samachar	2	3	4		9	
	Times of India	2	3	4		9	
Luckhnow	Dainik Jagaran	2	3	4		9	
Kolkatta	Anand Bazar Patrika	2	3	4		9	
	Telegraph	2	3	4		9	
National	India Today				4	4	
	Outlook				4	4	
	Week				4	4	
	Reader's Digest				2	2	
Total		40	55	68	14	177	19685150

Plan Performance

~ Dailies + Magazines ~

Market	GRP's	Reach	OTS
Mum & Pun	380	46	8
Nagpur	673	77	9
Delhi	625	64	10
Bangalore	720	67	11
Hyderabad	901	79	11
Ahmedabad	706	76	9
Kolkatta	560	70	8
Luckhnow	576	70	8
Chennai,Coim,Mad	660	69	10
Kochi	939	83	11

Media Approach - Television

- Minimize incremental cost per Impact
- Effective Reach (Reach at 3+ OTS)
- Cost Implications

Television Genre Effectiveness

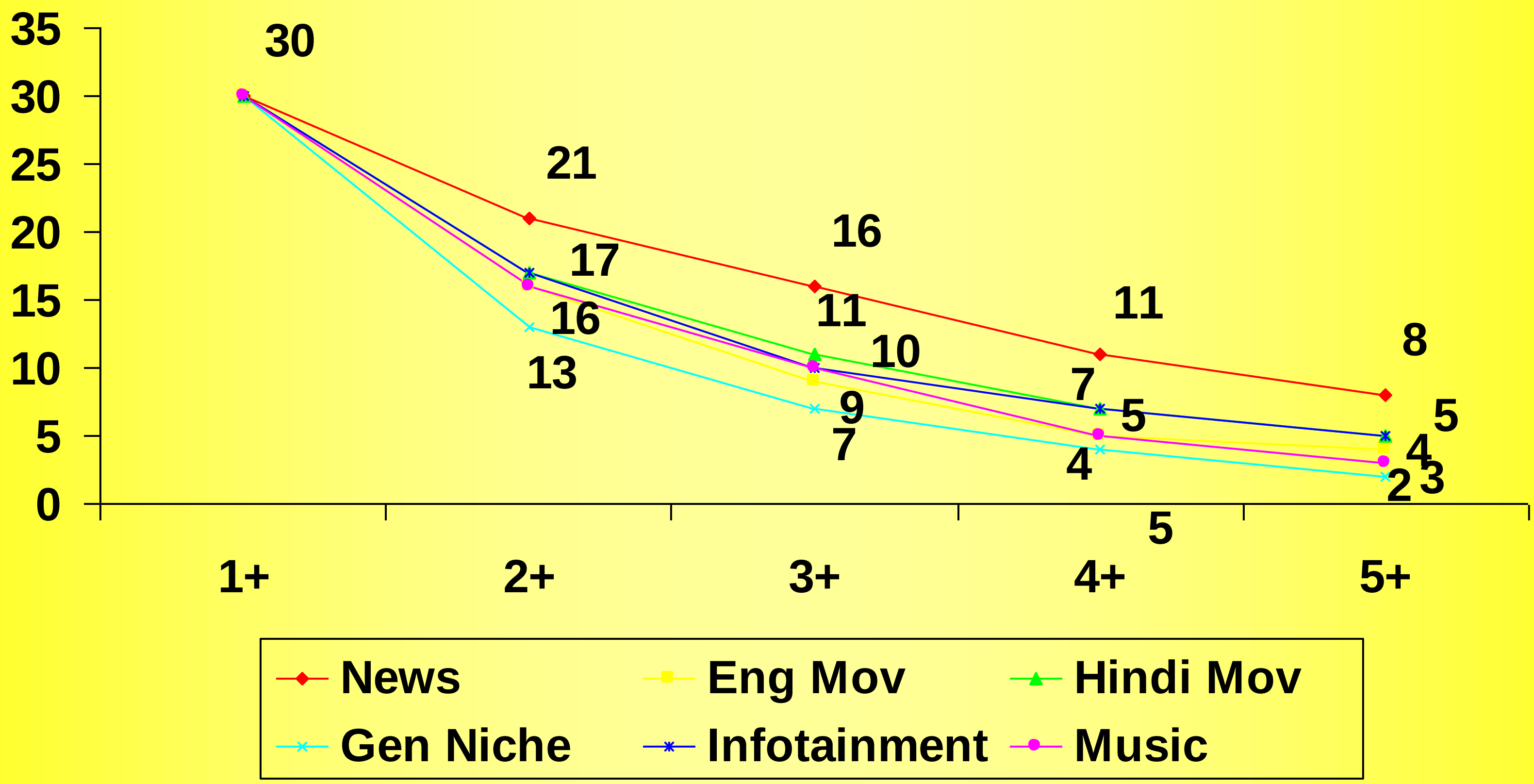
- Analyzing the lead channels representing each genre to see their effectiveness in terms of
  - reach at various frequency levels
  - GRP contribution
  - the number of spots it takes to attain a certain reach level
  - the cost implication

Television Genre Effectiveness

			Reach			
Genre	Channel	GRP	1+	3+	5+	7+
News	Aaj Tak	20	30	16	8	5
	Star News	25	30	12	6	5
Eng Mov	Star Movies	6	30	9	4	2
Hindi Mov	Zee Cinema	14	30	11	5	1
Gen Niche	Star World	8	30	7	2	1
Infotainment	Discovery	17	30	10	5	2
Music	MTV	20	30	10	3	2

DROP IN REACH (5+) IS MINIMUM FOR THE NEWS GENRE AND MAXIMUM FOR THE GENERAL NICHE AND MUSIC GENRE.

Television Genre Effectiveness



Television Genre Effectiveness

Genre	Channel	GRP	Reach 1+	# Spots	FCT (30 sec)	Rate/ 10sec	Cost (Rs.)	CPRP (30 sec)
News	Aaj Tak	20	30	57	1710	5000	855000	**43846**
	Star News	25	30	165	4950	6500	3217500	128700
Eng Mov	Star Movies	6	30	44	1320	5500	726000	119605
Hindi Mov	Zee Cinema	14	30	34	1020	4000	408000	**28936**
Gen Niche	Star World	8	30	128	3840	4000	1536000	187317
Infotainment	Discovery	17	30	171	5130	2200	1128600	66781
Music	MTV	20	30	214	6420	2500	1605000	80250

AAJ TAK AND ZEE CINEMA ARE THE MOST COST-EFFECTIVE OPTIONS
STAR NEWS AND DISCOVERY ARE IMAGE CONTRIBUTORS

TV Plan

Channel	Programme	Day	# Spots 30 sec	Total Sec	Total Cost	GRP's
Star News	RODP 1800 - 2400	Mon-Fri	30	900		
	RODP 0600 - 2400	Sat-Sun	35	1050		
			65	1950	1267500	10
Aaj Tak	RODP 6 pm - 9 pm	Daily	15	450		
	RODP 9 pm - 11 pm	Daily	15	450		
	RODP 3 pm - 6 pm	Daily	25	750		
	RODP 07 am - 1 am	Daily	55	1650		
			110	3300	1545000	20
Discovery	RODP 1800 - 2400	Mon-Fri	175	5250		
	RODP 0600 - 2400	Sat-Sun	100	3000		
			275	8250	605000	28
Zee Cinema	HFF 5:30 pm	Daily	75	2250		
	HFF 9:30 pm	Daily	75	2250		
	HFF 1:00 pm	Mon-Sat	50	1500		
			200	6000	800000	50
Total			**650**	**19500**	**4217500**	**107**

Period : 12 weeks

Innovations

- 52x1 cc vertical layouts in mainline dailies
- Island positions in Sports/ Business /Health pages
- Advertorials in magazines
- Bus panels
- Tactical presence during sporting events
  - Cricket series
  - World cup football

Budget Summary

Campaign	Period	Cost
Test Market	4 weeks	2081600
Roll Out -Print	20 weeks	19685150
Roll out --TV	12 weeks	4217500
Outdoor/Innovations	16 weeks	7500000
Medical Journals		500000
Total Cost		33984250

NPAFInc