

# THE RESHAPING OF INDIAN MINDS

## CITIZENS, CONSUMERS & BRANDS

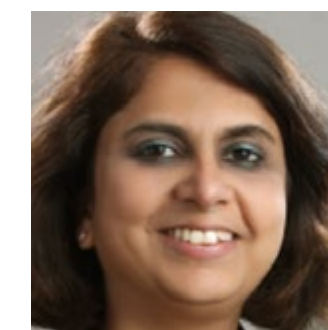
Shops reopen in May 2020,  
after Covid-19 lockdown.  
Bharuch, Gujarat





# Introduction

- In this, the second report in the series, we are exploring the effects of the Pandemic on brands and marketing, including communication.
- We looked beyond the obvious to identify the deeper meanings emerging from brands and communication and their likely effects on consumption.
- We studied how marketers and brands have responded to the Crisis from the very beginning and what that reveals about the codes that have emerged through a process of social consensus. We found that there is a marketing and branding culture in India that is governed by norms and conventions (codes) that top decision-makers converge to very quickly.
- After the first phase of 60 days of Lockdown, marketers and brand owners now need to consider what they need to do in the next phase, as we continue to live in the Covid Economy.
- As before, with the study on Masks, we have used the frameworks of Semiotics to carry out our analysis and draw inferences.
- We hope that our analysis stimulates thought, makes you question decisions and begin to consider different ideas for the next phase.
- The report is in three parts. In Part 1, we analyse Government actions and communication and how that aims to reshape our minds as Citizens. In Part 2, we analyse how consumerism and related values have been reshaped. And in Part 3, we take a closer look at advertising and brand communication.
- We then put forward our point of view on the challenges going forward and close with a set of questions to consider.



Hamsini Shivakumar  
Director  
Leapfrog Strategy Consulting





# FROM THE COVID WAR TO CO-LIVING WITH THE VIRUS: A NEW ARRANGEMENT BETWEEN STATE AND CITIZEN



# As a nation, we stand united to fight a WAR against a virus

Naming and Framing through the WAR metaphor, aimed to direct and change the meaning of the Pandemic Experience

THE War metaphor has enabled the rapid and full co-option of citizens into the virus containment effort. It has made citizens understand the situation and prepare themselves in specific ways:

- Absorb and digest the **SERIOUSNESS** of the situation, not take it lightly (as just another flu)
- Put themselves in **SURVIVAL** mode of thinking, registering that their own **LIFE** is at stake here
- Become willing undergo **HARDSHIPS** without complaining and rising up in rebellion
- Be prepared to make any **SACRIFICES** that are required, willingly
- Evoke their **PATRIOTIC** spirit to play their part for the national good

It has also allowed those in charge of governance to equate Lockdown with Wartime Curfews, thus explaining to the police and security forces in charge of enforcement, what is required of them.



**#CoronavirusOutbreak**

“  
On March 22, from 7 am to 9 pm, all Indians should obey the 'Janata' curfew. I request state governments to help enforce the implementation of the curfew

“  
No citizen, barring those in essential services, should get out of the house on March 22

“  
On March 22 at 5 pm, we should duly thank people like doctors, medical personnel, cleaning staff, for their service

**PRIME MINISTER NARENDRA MODI**

ht



# The WAR metaphor helps fuel patriotic sentiment



PATRIOTIC sentiment has been consciously stoked and fuelled through songs, staged events and the celebration of corona warriors on the frontlines.

Bollywood has taken the lead in creating songs and videos evoking the will to win, the intent to conquer the virus and not let it conquer us. Citizens locked away at home have been urged to show solidarity through various activities by the prime minister. The purpose of events has also frequently centered on celebrating doctors, nurses, delivery staff as the true Corona warriors risking their lives for their fellow countrymen.

The celebrations draw from the symbolism of Hindu rituals – they include the lighting of lamps, the ringing of bells and the showering of flowers. The Airforce carry out a flypast to shower petals over hospitals.

An all out effort to bolster the citizens' fighting spirit

LYRICSADDICTION.COM

HUM HAAR NAHIN MAANENGE





# Businesses respond as patriotic citizens, not as economic agents



Whether or not they are used, I want to express my appreciation to SkanRay, you, Velu and the joint team for your outstanding commitment and effort... You all made us proud.

**Pawan K Goenka** ✓ @GoenkaPk · May 14

SkanRay/Mahindra ventilator, especially designed for Coronavirus, is ready for production. Thankfully there is no demand. Despite the ingenuity and many weeks of hard work by our engineers, we hope the machines never have to leave our factories. @MahindraRise



A WIDE range of companies use their factories for the production of hand sanitizers, ventilators and PPE for health workers and doctors. They carry out the retooling and production effort in record time and at amazing speed. It's as if they are energized by the crisis to showcase the best of themselves for the good of the country and their fellow Indians as well as fellow human beings from other countries. CEO's take to social media to communicate their thinking as well as their efforts to the world at large.

Many brands produce messages and communication, asking Indians to stay at home.



Businesses offer their facilities to produce the necessary supplies required for the Anti-Covid effort and to remind Indians to stay at home.



# No longer a WAR to defeat the virus quickly but truce and peace

A new theme of “Living with the Virus” is introduced

AS the lockdown is lifted in a phased manner, the media has labelled the experience using the versioning analogy from the software industry, thus calling it Lockdown 1.0, 2.0, 3.0 and now 4.0.

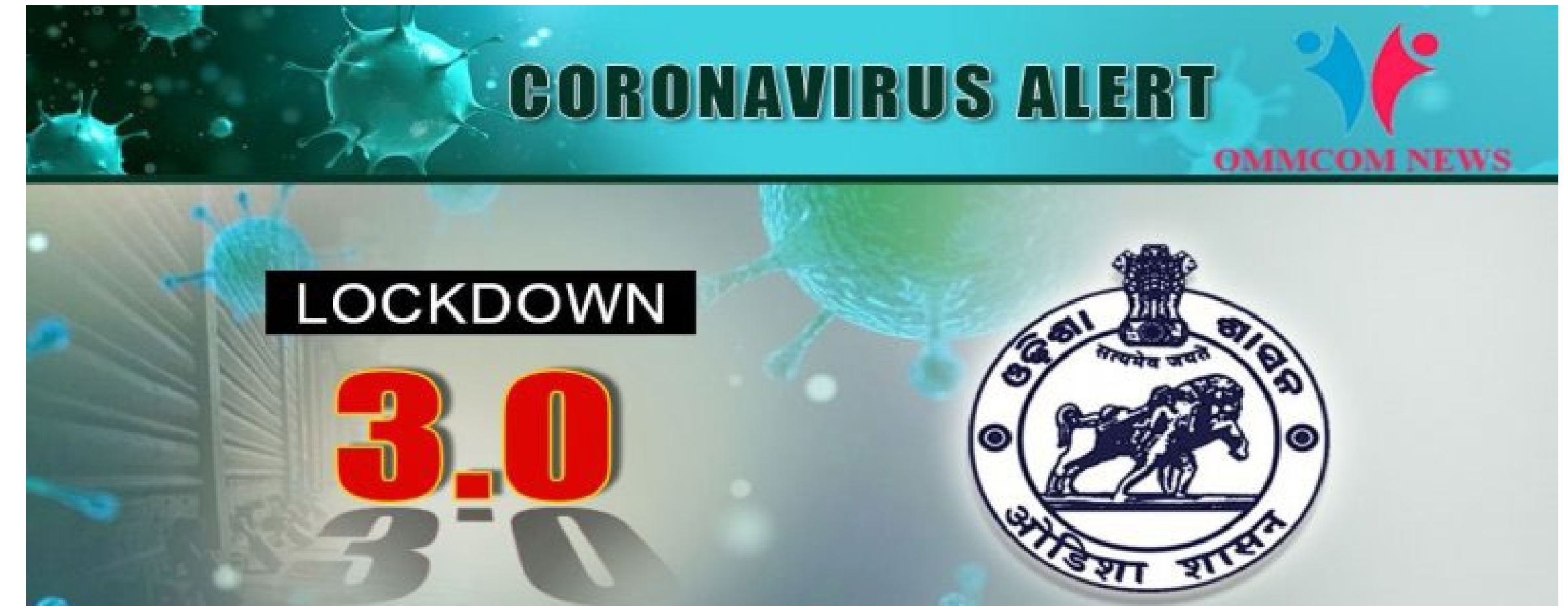
This analogy enables the ‘normalizing’ of the heavy state control over citizens movements and public behaviours, for the purpose of controlling the spread of the Covid-19 disease.

The Health Ministry has informed citizens that they need to adopt a set of 3 actions (masks, social distancing and hand washing/sanitizing) into their everyday behaviour in order to learn to live with the virus.

The new phase from June 1st has been labelled Unlock 1.0 to signal the opening up of many more activities for citizens.

Yet, the complete return to pre-covid behaviours has not been signaled yet. The State still retains the powers to act swiftly to shut down or ban activities, if the numbers of infected are looking too high or the situation looks like it is getting out of control.

Learning to “Live with the Virus” is learning to live with restrictions which can change every few weeks.





# Added easing of curbs

Step-wise relief in red, orange, green zones; all restrictions to stay in containment areas

## THE NEW RULE BOOK

In lockdown 3.0, which will continue for 2 weeks from May 4, the government has given area-specific relaxations

### What's allowed in red zones?

- Private offices can operate with up to 33% staff strength
- Movement of vehicles in certain cases, but with just two passengers besides the driver
- Industrial activities in urban areas limited to Special Economic Zones, and manufacturing units of essential goods and pharmaceuticals, among others
- Construction activities in urban areas restricted to where workers are available on site
- Standalone shops and shops in residential complexes
- Commercial establishments such as print and electronic media, and IT and IT-enabled services are allowed

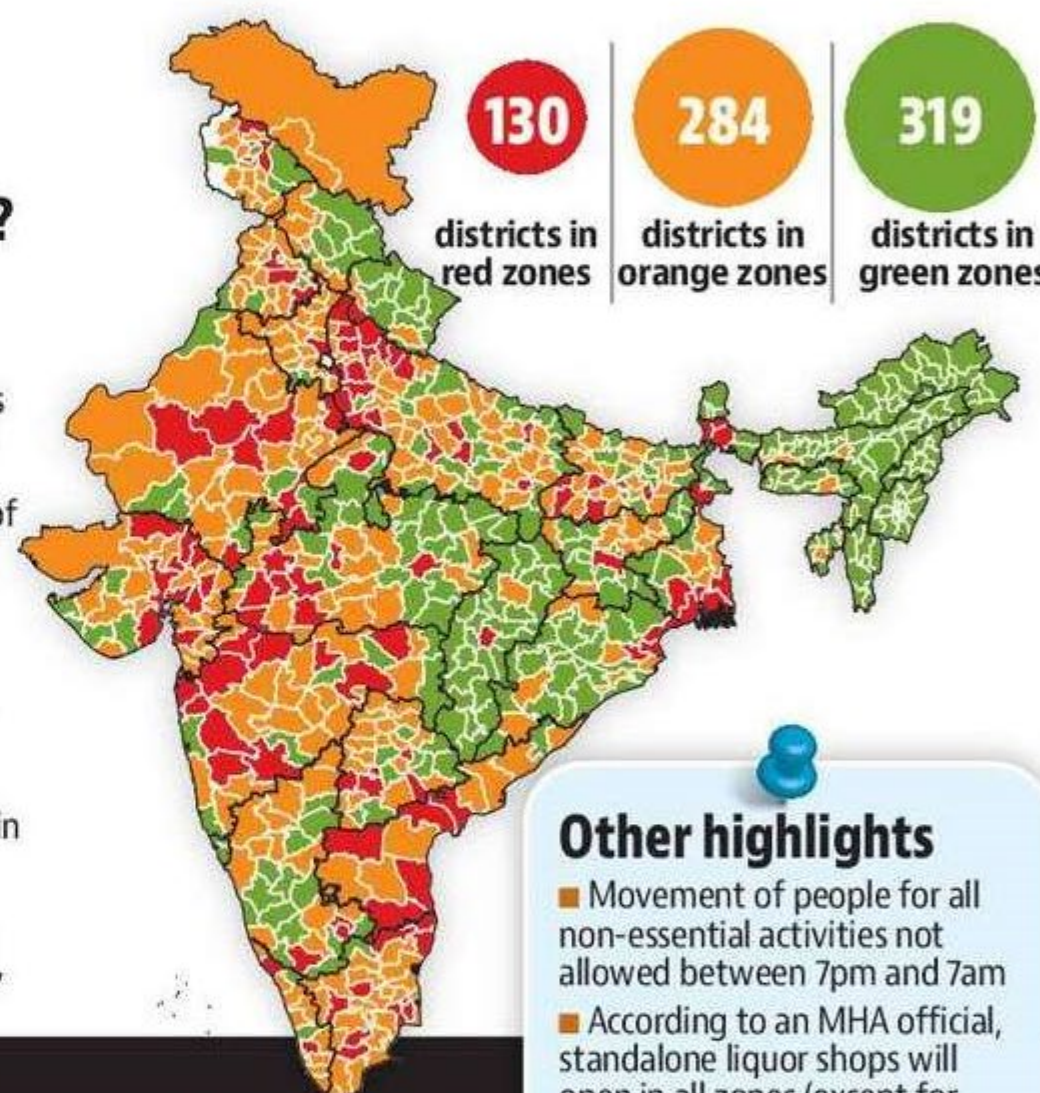
(All major metro cities such as Delhi, Mumbai, Chennai, Kolkata, Hyderabad, Bengaluru and Ahmedabad are in red zones)

### What's allowed in orange zones?

In addition to activities allowed in red zones, orange zones will allow taxis and cab aggregators (with one driver and two passengers); and inter-district movement of individuals and vehicles (for permitted activities)

### What's allowed in green zones?

In addition to activities allowed in orange zones, in green zones buses will operate with up to 50% seating capacity and bus depots with 50% capacity



### Other highlights

- Movement of people for all non-essential activities not allowed between 7pm and 7am
- According to an MHA official, standalone liquor shops will open in all zones (except for containment areas). Also, shops selling liquor and tobacco products can't have more than five people at a time
- Aarogya Setu app a must for govt and private employees

### WHAT ARE THE ACTIVITIES BANNED ACROSS INDIA?

- Domestic and international air travel of passengers
- Passenger movement by trains, except those cleared by govt
- Interstate buses for public transport, except in a few cases
- Metro rails; schools, colleges and educational institutes; and hospitality services other than those for essential employees and those stranded
- All cinema halls, shopping malls etc.
- All social, political, cultural and religious gatherings

## All major cities now part of 130 red zones

Vijdan Mohammad Kawoosa and Rhythma Kaul

letters@hindustantimes.com

**NEW DELHI:** The Centre on Friday listed 130 districts as hot spots of

some relaxations.

The Union health ministry removed 92 districts from the 170 it had classified as Covid-19 hot spots on April 15 and added 52 new districts to the list, leaving

stories (UTs), but only four states are home to more than half of them.

In the fresh classification, which will be followed by states and Union territories for a week

**RATION FOR 3.9MN MORE**

**NEW DELHI:** The Centre

# The "License-Permit" Raj is back

- Many restrictions placed on citizen's movements and freedoms as well as the 'permitted' ways to get their needs met
- Relaxations given are also conditional – they can also be revoked if infection numbers rise
- Home Delivery, Work from Home – the home is the fortress that protects citizens from the virus and its spread/transmission
- Offices, factories and workplaces have to adhere to new sets of regulations in order to be operational
- Places are open and shut by government as per the level of concern around the infection rate

The Government and all forms of authority acquire a high level of directive control over citizens and therefore over their consumption habits as well

snapnews

BUSINESS INSIDER INDIA

## COVID WARS

Lockdown extended till May 3





# Group Membership trumps individual choice and individual rights

A partial surrender of individual freedoms and pleasures for collective safety and security

INDIANS were addressed by the PM as citizens and countrymen. They were asked to perform their duty and responsibility as citizens to fight the battle against the virus, celebrate and support front-line health workers and stay at home, until permitted to move about outside. Thus, citizenship was brought to the forefront of public consciousness.



Indians also realized that the residential building and neighbourhood where they lived, was the first community membership that they had to become conscious of and the first boundary to be mindful of. In the battle against the disease, Indians had to compromise on both individual choice and pleasures as they could not go out and there were only essential supplies available. They also had to give up their freedom of movement in order to contain the spread of the disease and do their part as responsible citizens.





# Citizens have a whole new experience of law enforcement



DURING the lockdown, citizens saw much more patrolling of streets and spaces by the police forces. Normally, the police has a limited presence and role to play in the everyday lives of citizens in the big cities and smaller towns. Indians believe that they can bend and fix the law, especially traffic rules by paying money to the force. Largely, most transgressions can be fixed with enough money.

The Police use both carrot and stick approaches to enforce the “Stay-at-Home” mandate

For the first time, Indians had an experience of what law ‘enforcement’ can be, as the police patrolled the streets and pushed citizens into their homes, especially in containment zones.

At the same time, they also saw a human, creative and fun side to the police force as the police tried to enlist the support of citizens in the endeavour to keep them at home and to channelize citizen energy towards the Covid war.





# Adaptive ingenuity blossoms as new ways have to be found to survive

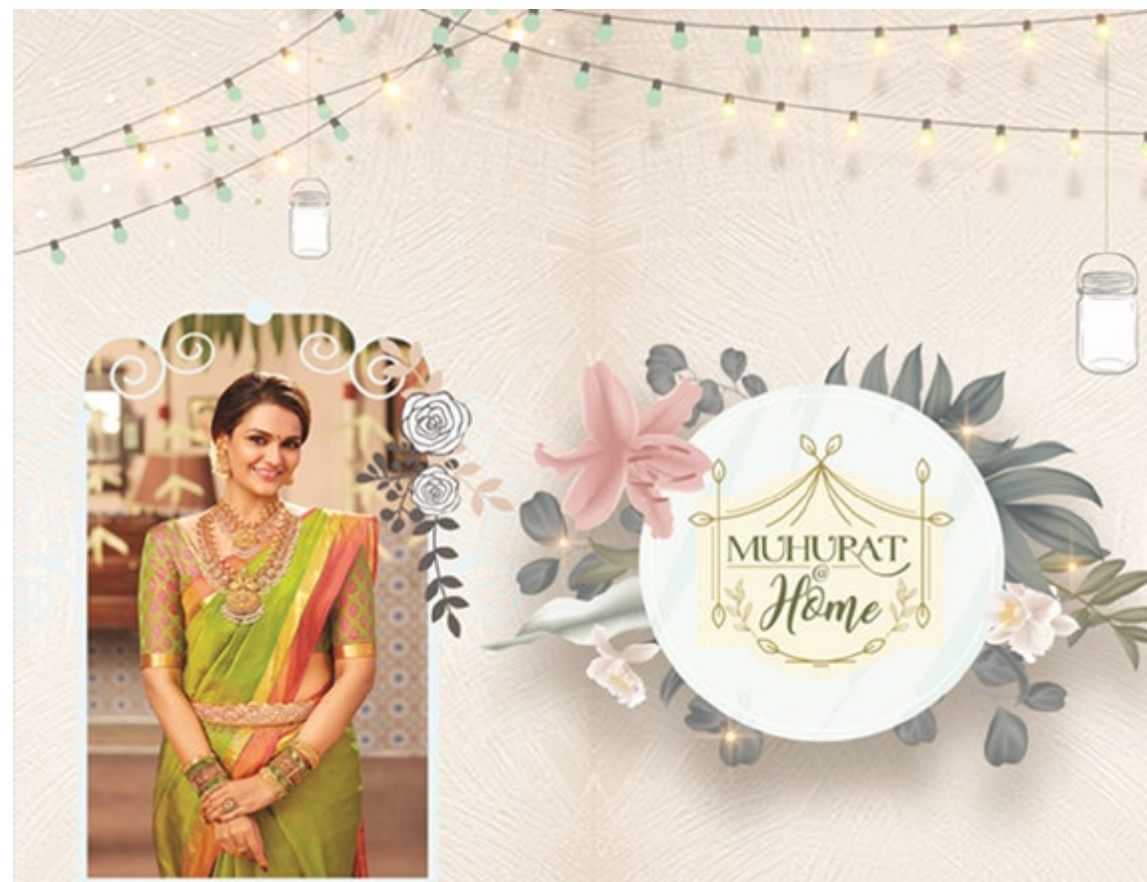
Businesses find ways to pivot and adapt in order to survive the lockdown and its aftermath in the economy

AS many sectors remain shut due to the lockdown or can only operate under very stringent conditions, businesses in these sectors need to find ways to survive. They fall back on sheer enterprise and adaptive ingenuity.

Hotels which would otherwise be shut, convert themselves into quarantine centres with the support of state administrations. Travel companies start operations in home delivery services. Textile companies produce PPE for hospitals and the medical fraternity. Restaurants convert their kitchens and retrain their staff for home delivery.

Existing delivery apps and e-commerce companies quickly expand their operations to deliver a whole range of products that they didn't earlier. The local kirana finds ways to cater to the needs of people by bringing them what they want, including difficult to obtain items.

Even in Unlock 1.0 after June 1st, running businesses under the new conditions of the Covid economy – strict rules for controlling the virus spread and much lower levels of demand, requires a very high degree of adaptive ingenuity to survive



## MakeMyTrip Launches Gourmet Meal Delivery

T3 News Network 15 May 2020 259 Shares 2 f Share Tweet in



MakeMyTrip has rolled out an online gourmet delivery service in partnership with luxury and premium hotel chains and independent properties across cities in India. With traditional dine-in experiences coming to a grinding halt due to the coronavirus pandemic-triggered lockdown, MakeMyTrip aims to bring culinary experiences from top restaurants to the doorstep of discerning customers in Delhi, Mumbai, Chennai and Bangalore.



# New value filters to regulate consumer behaviour



THE government's concerted push towards reshaping the mindsets of Indians as citizens and the lockdown experience results in a different set of values gaining in salience and celebrated as part of culture. These become filters for assessing consumption behaviours. Many of these were trends even prior to the pandemic, but they gain greater momentum in the Covid economy and linger on into the post Covid Society.

- Patriotism:
  - Swadeshi vs. Videshi ... Local (Indian) brands are more 'cool' and 'desirable' than International brands
  - Discipline, obedience and compliance
- Survival smarts:
  - Ingenuity and Adaptiveness
- Technology Adoption:
  - Everyone must acquire digital familiarity
- Concern for the community and clan over focus on oneself:
  - Sharing and caring
- Environmental consciousness
  - Simplified living, questioning mindless spending
- Purposeful living
  - A search for a sense of mission, pride and fulfilment vs. focus entirely on lifestyle enhancement

Rising salience and consciousness of a different set of values





A photograph of a red and green metal shopping cart in a supermarket aisle. The cart is empty except for a yellow board attached to the back. In the background, there are shelves stocked with various products, including Braun shavers and Coca-Cola cans. The floor is made of light-colored tiles.

# CO-LIVING WITH THE VIRUS IN THE COVID ECONOMY: THE BELEAGUERED INDIAN CONSUMER



# The consumer was King and the citizen was entitled

The post-liberalization arrangement and understanding in India of the ideal relationship between citizen, consumer, business and the government.

AFTER the 1991 economic liberalization process, urban consumers and those who had money learnt that as consumers, they could be Kings. Businesses worked very hard to satisfy and delight consumers and those who had money could buy whatever they wished. Money enabled Indians to address gaps of governance by buying products and services to bridge the gap. Bad water? Buy water purifiers. Polluted air? Buy air purifiers. Noise pollution? Listen to music on your headset. They were seduced to shop with discounts and offers, with low prices, with a huge variety of products and services as per their liking. An Indian with money to shop with, was a King. He/she could be excessively demanding of business, especially in terms of customer service and customer experience.

At the same time, as citizens, rural voters and the urban poor were given a slew of rights which became their entitlements with no expectation of reciprocal obligations to the State being demanded from them. Whenever the economy ran into trouble or sectors had issues, business could lobby the Government for bail outs and special privileges, as consumption is the engine that powers the economy and sustains GDP growth.



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REFRESH  
SALE  
LAST DAY TODAY

OUR BIGGEST SALE EVER#  
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\*Min. Trxn: ₹3,000; Max. Discount: ₹1,000 per card.  
Validity: 18<sup>th</sup> – 23<sup>rd</sup> Jun'19. Also valid on EMI Trxn. with SBI Credit Card. T&C apply.





# Citizenship trumps consumerism; self-reliance wins over entitlement



CITIZENS are addressed directly as such by the PM. They learn that even in the toughest of crisis, they have to learn 'Self-Reliance'. 'Self-Reliance' (Atma-nirbharata) is a virtue that every Indian needs to cultivate so that he/she can triumph over all challenges that come their way.

The PM believes that while the government can help the citizen up to a point, ultimately, he/she has to help himself to overcome any crisis that he encounters in life. There are no free lunches, though there can be subsidized lunches for a while.

The Government can enable citizens, give them a leg up and give them access to the basic requirements to live with dignity, using technology and other means, but it is always on a contributory basis. If the State provides a free Gas connection, the user then has to pay for the cylinders that he/she consumes.

Citizens as economic agents have to take charge of their own agency to assert their human dignity. Dignity cannot be bestowed upon them via grants from the State, but is earned by them by paying their way too. This principle holds for the poor villager as much as it does for the Industrialist approaching the Government for subsidies, tax waivers and the like. Or even a bail-out in the context of a bankruptcy or business collapse.

The power of the State is used for social engineering and to ask for reciprocal partnering from citizens





# What happens to the values that underpin India's consumption?

Consumerism, Materialism and Aspiration (CMA) are the three ideologies that underpin India's consumer economy today, for the consuming classes (those who have moved beyond poverty and subsistence living)



CONSUMERISM celebrates individual choice and the pursuit of pleasure. It is often combined with political liberalism as an ideology, celebrating personal freedoms (individual's autonomy from the group and group pressures) and indulgences (hedonism). A market should provide a thousand or even a million options to consumers so that each one can get exactly what he/she wants and likes so that he/she can shop and find a way to fulfil not just needs, but every want and every desire, to the maximum.

Materialism celebrates acquiring possessions as the ultimate marker of a successful and well-lived life. Find a way to acquire the wealth so that you can have unlimited possessions – a fleet of cars, any number of houses, cupboards full of clothes, shoes, jewellery, accessories, paintings, art, music, whatever takes your fancy.

Aspiration celebrates the intent to do better in one's life, moving up the social class ladder by making more money, reaching the top of one's profession, getting more fame, more of everything.

Consumerism, materialism and aspiration as life philosophies work in mutually reinforcing ways to fuel the consumption based economy and society. They work to move people from need based consumption and savings orientation towards desires and wants based consumption and spending orientation.

## The new, new status symbols

By - TOI Crest | Created: Mar 13, 2010, 00:00 IST





# The new realities put brakes to the expression of CMA



SHOPPING pleasure can no longer be unlimited, with money as the only brake to pleasure. Pleasure and indulgence is constrained by access (will restaurants be open?), safety concerns (can I try on clothes before buying them, is that safe?) and consciousness of the collective (will my neighbours be OK if I host a party for 50 people at my home?).

The flashing of material possessions as indices of social success may not be applauded but envied. So the pressure to share or in some way enable more people to share in one's success may be felt and this would shape purchases and expenditure. Either one spends in a more "social" manner or one doesn't spend at all.

Aspirations are tempered by economic uncertainty and the need to take care of one's financial security.

It is also possible that environmental consciousness among young people in their 20s as well as 30s, also reinforces these limits and brakes. It enables the narrative of limiting consumption into a positive (virtue signalling) instead of a negative (downgrading, deprivation).

Consumerism, Materialism and Aspiration are now tempered by access (movement boundaries), safety concerns and consciousness of the group, of collective preferences. As well as by economic uncertainty.





# Extreme safety measures result in joy-less spaces and experiences

When systems are designed to totally control the spread of the virus, joy and pleasure are eliminated as well. This, in turn, will suppress consumption.

SPACES and experiences are now being re-designed with a singular goal, that of controlling the spread of the virus, of preventing any potential carrier from entering the space and to ensure that the space stays uncontaminated.

This includes air travel followed by office spaces. When restaurants and malls open, the government issued guidelines and protocols could end up having the same effect.

The goals of consumerism – pleasure, enjoyment and fun and the goals of health officials – lowering the chances of the spread of the infection down to zero are on a collision course. Extreme safety measures, created to achieve the system designer's goals of sustained low-no infections completely negate and remove pleasure, enjoyment and fun.

Travel, eating out and shopping become activities undertaken out of necessity and need, not desire and enjoyment. This will have the effect of suppressing the consumption economy.





# BRANDS IN THE COVID ECONOMY: COMMUNICATION, IDENTITY & MEANING





# Advertising is an expense when it doesn't bring in sales



The advertising agency business, like many other businesses, has taken a hit because of the coronavirus outbreak. (Photo: iStockphoto)

## Covid-19 impact: Advertising sector can't survive without govt relief, says AAAI

1 min read . Updated: 16 Apr 2020, 10:23 PM IST

SOON after the lockdown was imposed and its time line was not clear, businesses had a quick realization that their revenues were likely to crash. With people confined to their homes for 21 days and longer, even 50-60 days, many services shut down, with only essential products and services made available, all businesses faced massive disruption to their operations.

As a result, many if not most businesses cut back entirely on media advertising in traditional media channels - outdoor, print, television. While consumers were spending more hours at home and in front of the television, businesses still chose to cut advertising, because the link between advertising and sales was broken by the lockdown. With consumers buying what is available rather than what they prefer, campaigns no longer contribute to choice at the point of purchase.

Businesses pull back from advertising in the lockdown in order to conserve cash and protect the business

Home > Industry > Advertising > News Broadcasters Association asks for GST relief on advertising for broadcast



(Photo: ANI)

## News Broadcasters Association asks for GST relief on advertising for broadcast

1 min read . Updated: 14 Apr 2020, 06:49 PM IST

Lata Jha

The association wants 18% GST on advertising for broadcast media to be either removed or reduced to 5% on a par with print media



# Brands converge on a set of communication codes

BRAND communication converged into a set of norms or codes pertaining to the “right” stance, tonality and messages for sustaining consumer connect and touching the hearts and emotions of consumers. The speed with which this alignment was arrived at, reveals the extent of similar thinking in marketing/advertising circles and the presence of a marketing culture in India.

We identified seven codes used by brands to take the high ground in their Lockdown communications.

Businesses continue to follow the Laws of Branding to secure their future after the pandemic is gone

COMMUNICATION CODES: TAKE THE HIGH GROUND IN A CRISIS	
1	BE A WELL WISHER, FRIEND AND PROTECTOR OF THE PEOPLE, NOT A SELLER
2	ATTITUDE OF GRATITUDE
3	BE THE VOICE OF HOPE
4	ACTS, NOT JUST ADS
5	SENSITIVITY OVER OPPORTUNISM
6	SHOW SOLIDARITY – SIGNAL WILLINGNESS TO GO THAT EXTRA MILE
7	PEOPLE USE HUMOUR TO LIGHTEN DARK TIMES, BUT BRANDS STAY ON THE SIDE LINES





# Friend & Well Wisher Stance

Lifebuoy and Dettol present themselves as focused on public welfare, not selling

**This is not an ad for Lifebuoy. This is a public service message.**


Know the simple guide that 'F.I.G.H.T.S' the coronavirus  
*F*requent handwashing with soap  
*I*ntant germ-kill with alcohol-based sanitizer when out of home  
*G*o to the doctor when you have a cold or cough or fever  
*H*ome rest if you are feeling unwell  
*T*issues and masks to be used when you cough or sneeze  
*S*tay away from raw meat and wild/live farm animals  
 Please use any soap nearest to you. Not just Lifebuoy, but any soap like Lux, Dettol, Santoor or Godrej No.1.




**This is a public service message from Lifebuoy**



\*Washing hands with soap and water or use of an alcohol-based hand sanitizer is one of the World Health Organization recommended measures to help reduce risk of Coronavirus infection.  
 \*Please follow additional guidelines recommended by health authorities like W.H.O. & C.D.C./local health authorities.



or use an alcohol based hand rub to decrease the chances of novel corona virus.

\*As per the WHO guidelines, effective handwashing should be done for no less than 15-20 seconds to ensure removal of germs.

1. Wash hands with soap and water
2. Cover your face when sneezing and coughing
3. Avoid close contact with anyone who has a fever or cough
4. If you have fever or cough, seek medical care immediately.
5. Avoid direct contact with wild animals
6. Avoid consumption of raw or under cooked meat

IKATAN DOKTER INDONESIA MARI JADIKAN INDONESIA LEBIH SEHAT

**WASPADA WABAH VIRUS CORONA**



Reisa Broto Asmoro

SUPPORTED BY: Dettol

# Attitude of Gratitude

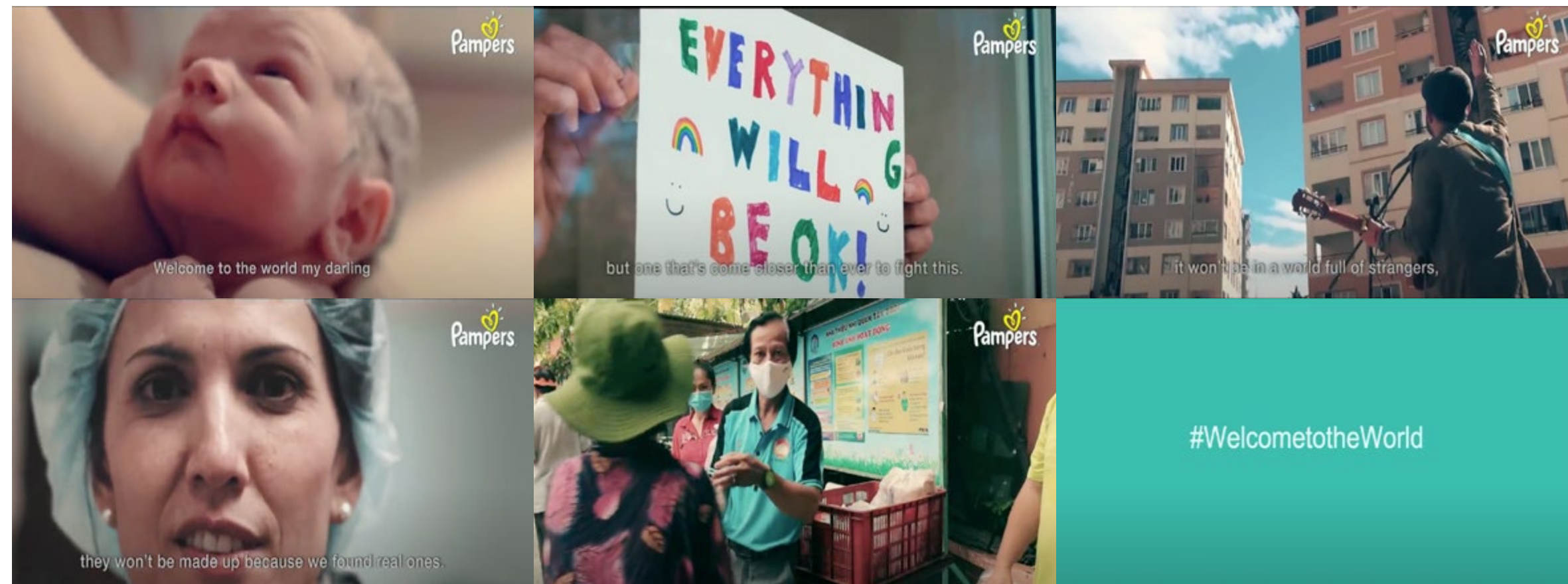
Mahindra, Google and Cadbury remind us to express our gratitude to those who support and protect us and take the risks themselves





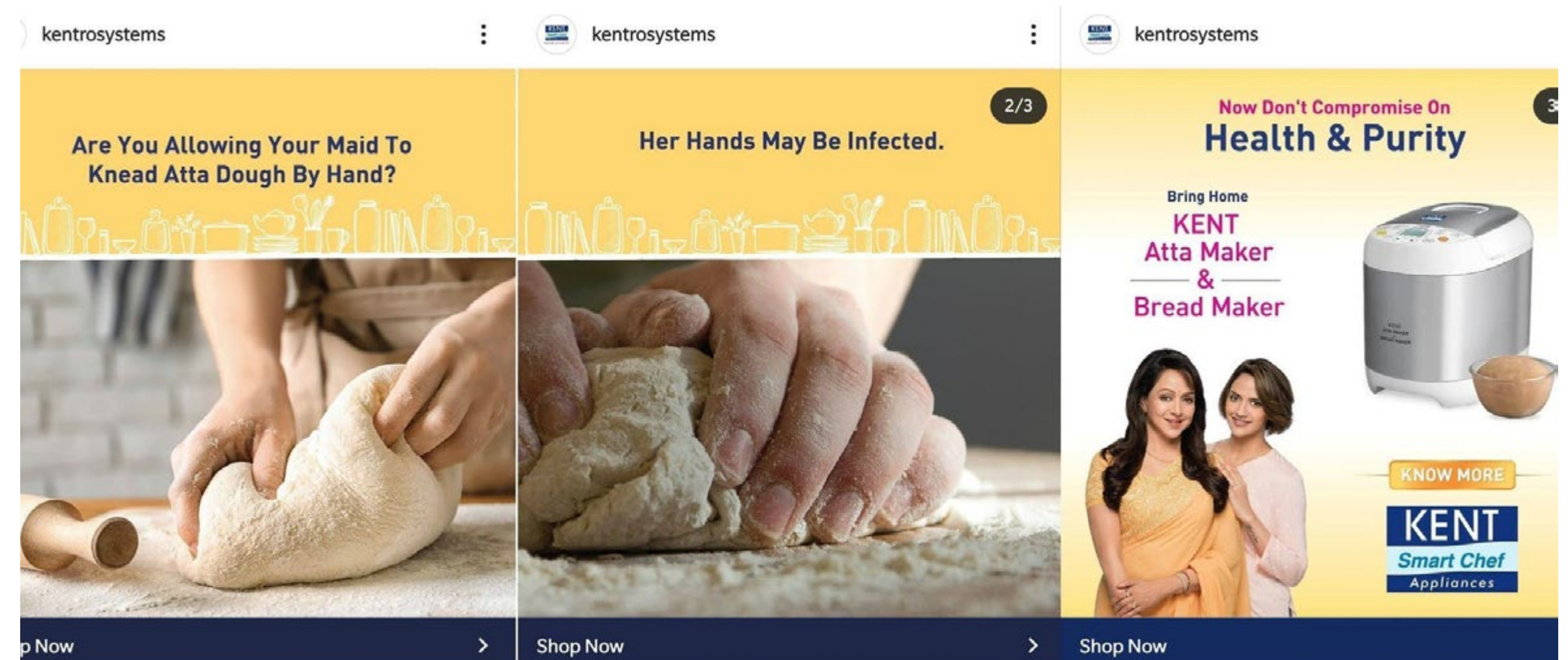
# Voice of Hope

Coca-Cola and Pampers remind us that there is a lot to be optimistic about in this world



# Sensitivity Over Opportunism

Brands that tried to be opportunistic in using the situation for sales got panned in social media for lack of sensitivity and rapped by ASCI for false claims





# Acts, Not Just Ads

A slew of brands took the stance that actions speak louder than words and will garner more consumer goodwill

John Distilleries, Nivea made hand sanitizers

Welspun, Khadi Gramodyog made face masks and PPE

Taj Hotels, JW Marriott and Ginger Hotels provided food to migrants

FDCI set up a Covid Relief Fund to support young designers

Fashion Brand Bhaane fed street animals

Byjus provided free e-learning. IBM made all its cloud services free for three months



# Going the Extra Mile

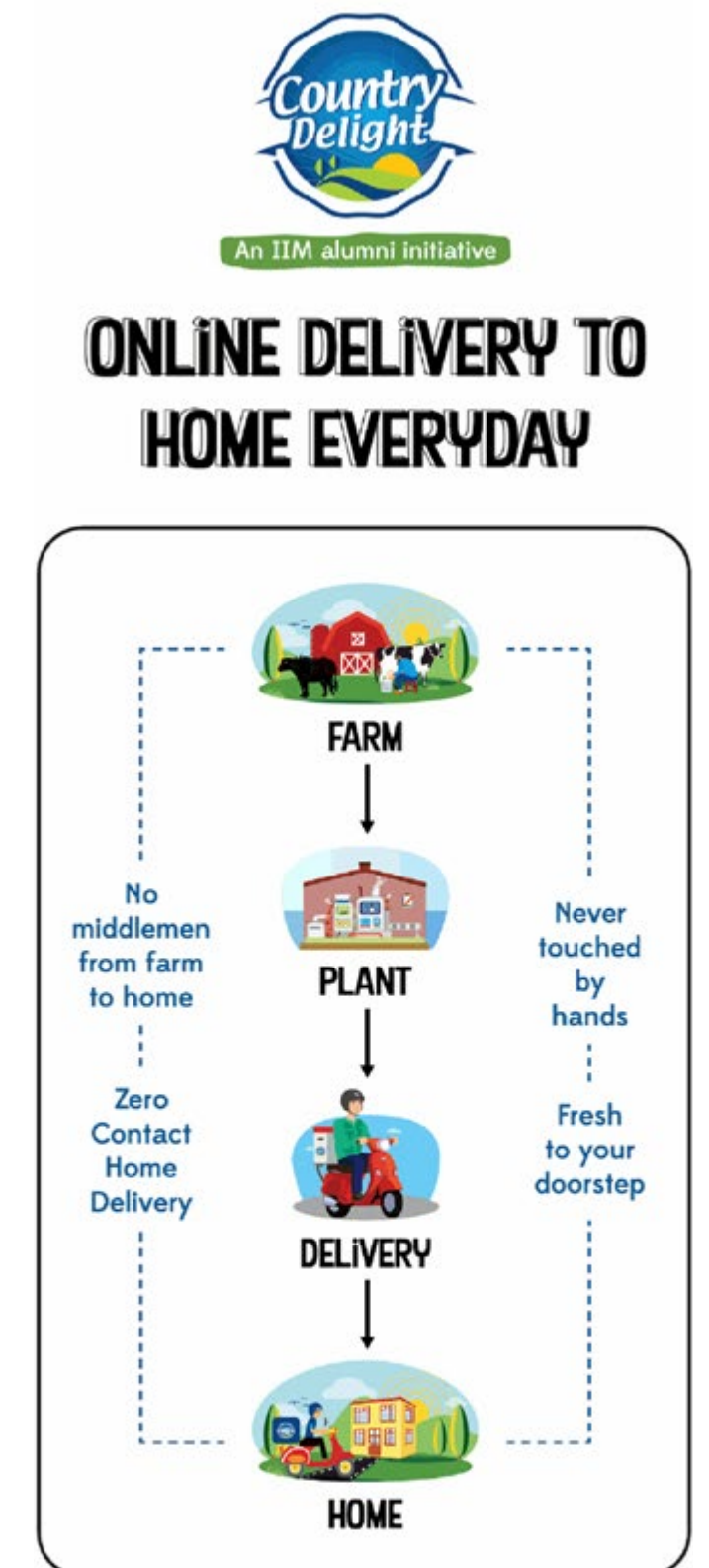
Brands opened up the most sacred aspect – their identity and their core promise for conveying Covid safety messages ... signalling their solidarity with people and willingness to go the extra mile for them





# Themes for Consumer Connect

BRAND communication during the lockdown periods (1.0 – 3.0), and especially in the first lockdown was based on themes that talked to the new consumer reality. The themes ranged from the emotional to the practical, pointing out the positive that could emerge from the lockdown experience as well as educating people on staying safe.



THEMES: FOCUS ON PEOPLE'S EMOTIONAL & PRACTICAL NEEDS AS WELL AS THE PREVAILING SENTIMENTS DURING THE LOCKDOWN	
1	FAMILY, HOME AND TOGETHERNESS
2	EVERYTHING FROM HOME – STAY AT HOME
3	HARNESSING THE POWER OF TECH – RAPID SHIFT TO DIGITAL PLATFORMS
4	RESPONSIBILITY AND DUTY
5	SAFETY EDUCATION, PRACTICAL INFORMATION

A TATA and TESCO Enterprise

**star**

**Safe & Clean Shopping**

- Temperature checks for employees & customers
- Dedicated shopping hour for elderly & differently-abled
- Queue management in place
- Staff sensitisation around hygiene, Sanitizers available
- Handling of fresh food with care
- Rigorous cleaning schedule

**SHOP ONLINE**

**AAP RAKHEIN DHYAAN APNO KA, HUMEIN DHYAAN AAPKA**

**Thank you Customers for your Love, Care & Trust.**

“Visited Star Bazaar at Seajapur Road and I was very impressed with the great job done by the store staff, given the current situation. They were screening everyone at the entrance, fruits & vegetables stocking was great, the checkout was calm and unhurried. Grocery retailing is tough at the best of times and great to see a tight ship amidst the current situation.”

-Venkatesh Parthasarathy  
STAR Customer

“Tried ordering some basic essentials online yesterday but they were out of stock. Went to @starbazaarindia at 9am and came back with what I needed.”

“Live all, I went searching for sanitizers in my area. Not available at the pharmacy shop. Local store was out of stock. From some local manufacturer who had priced it at some random rs 300 for a small bottle. Then I went to Star Market, was glad to see Lifebuoy sanitizers in good quantity. At the same reasonable price it used to be. Great to see such day to day brands showing social responsibility and being ready and geared to meet increased demand.”

#sociallyresponsible PetliconBusiness

**#HereForYouWhenItMatters**

**OUR STORES ARE OPEN FOR YOU**

Hyper • Andheri (W) • Crystal Point, New Link Road • Thane (W) • Korum Mall Market • Andheri (E) • Hubtown Solaris, Opp. Teligalla • Mulund • Opp. Railwolf, Off

**FLAT 40% OFF**

ON YOUR FIRST 3-DAY TRIAL ORDER

**Test purity at your Doorstep**

Get your own milk adulteration test kit, **FREE!**

**OUR PRODUCTS**

COW MILK

LOW FAT COW MILK

BUFFALO MILK

GHAR JAISA DAHI



# Brand: Pre-Covid

An entity focused almost entirely on commerce and doing business.

Addresses people as 'consumers' and 'shoppers'

Intent on creating 'markets' out of all human needs, wants & desires

Flagbearers of the ideologies of Materialism, Consumerism and Aspiration.

Core Belief:

"Hell is a place where there are NO SHOPS, NO CHOICES AND FEW PLEASURES"

## THE SHAPE-SHIFTING BRAND



# Brand: During Covid

An entity that has concerns beyond commerce and business.

Addresses people as citizens and human beings.

Being HUMAN is the most important value of all, the greatest priority in a crisis

Flagbearers of the ideologies of Humanism, Nationalism, Patriotism

Core Belief:

"Hell is a place where there are NO HEALTHY, HAPPY PEOPLE – ONLY DEATH & DESTRUCTION"



# Pre-Covid: Branding 101

The Brand is a Fixed Point in consumers' mind space

The USP  
The "One" Concept or Idea  
Clarity  
Consistency  
Repetition

## THE BRAND



# During Covid: A New Rule Book

The Brand is a shape-shifting entity in consumers' mind space

The brand is responsive to changing context. It responds to situational requirements as they arise.

The brand has multiple faces through which it addresses people.



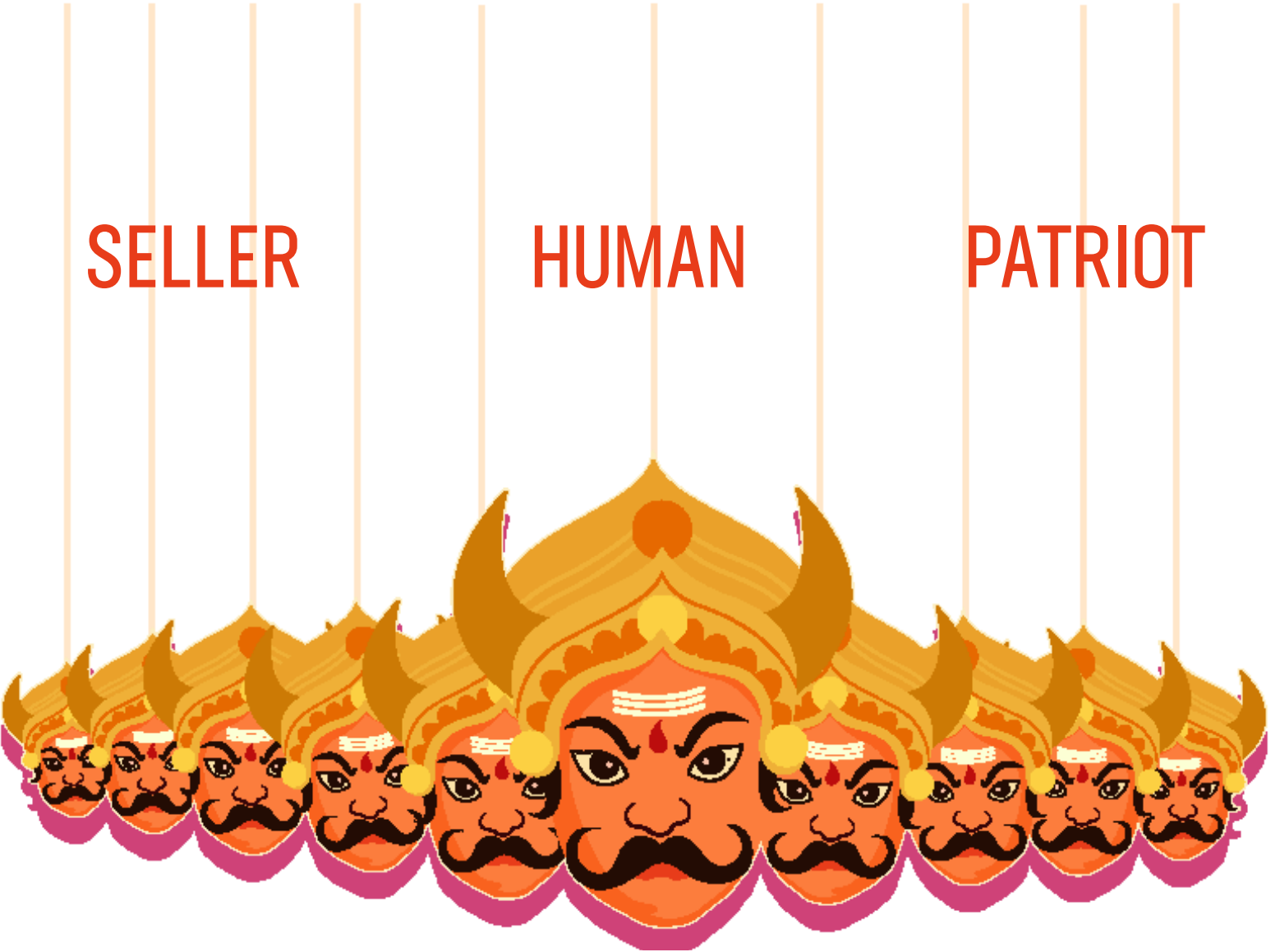
# Pre-Covid: Branding 101



## THE BRAND



# During Covid: A New Rule Book





# WHAT DOES THE RESHAPING IMPLY FOR BRANDS, COMMUNICATION AND CONSUMPTION?



# Citizenship and Consumption

- In the pre-covid past, citizenship and consumption had no connection with each other. Marketers and brands could safely ignore nationalistic sentiments if they wished to. Their focus was on the adage that the Consumer is King.
- Now that national interest is considered primary and citizenship is gaining rapidly in importance, how would this impact consumers' expectations from brands?
- If the duties, responsibilities, sentiments and qualities of citizenship are more salient than the wants and desires of a consumer; the Indian is first a citizen and only then a consumer, how would consumer behaviour change?
- When the values of citizenship act as a filter to consumption behaviours and practices, would a sentiment of good for me and good for India come to prevail, especially amongst a segment of Indians, creating a specific type of sub-culture of patriotic shoppers?







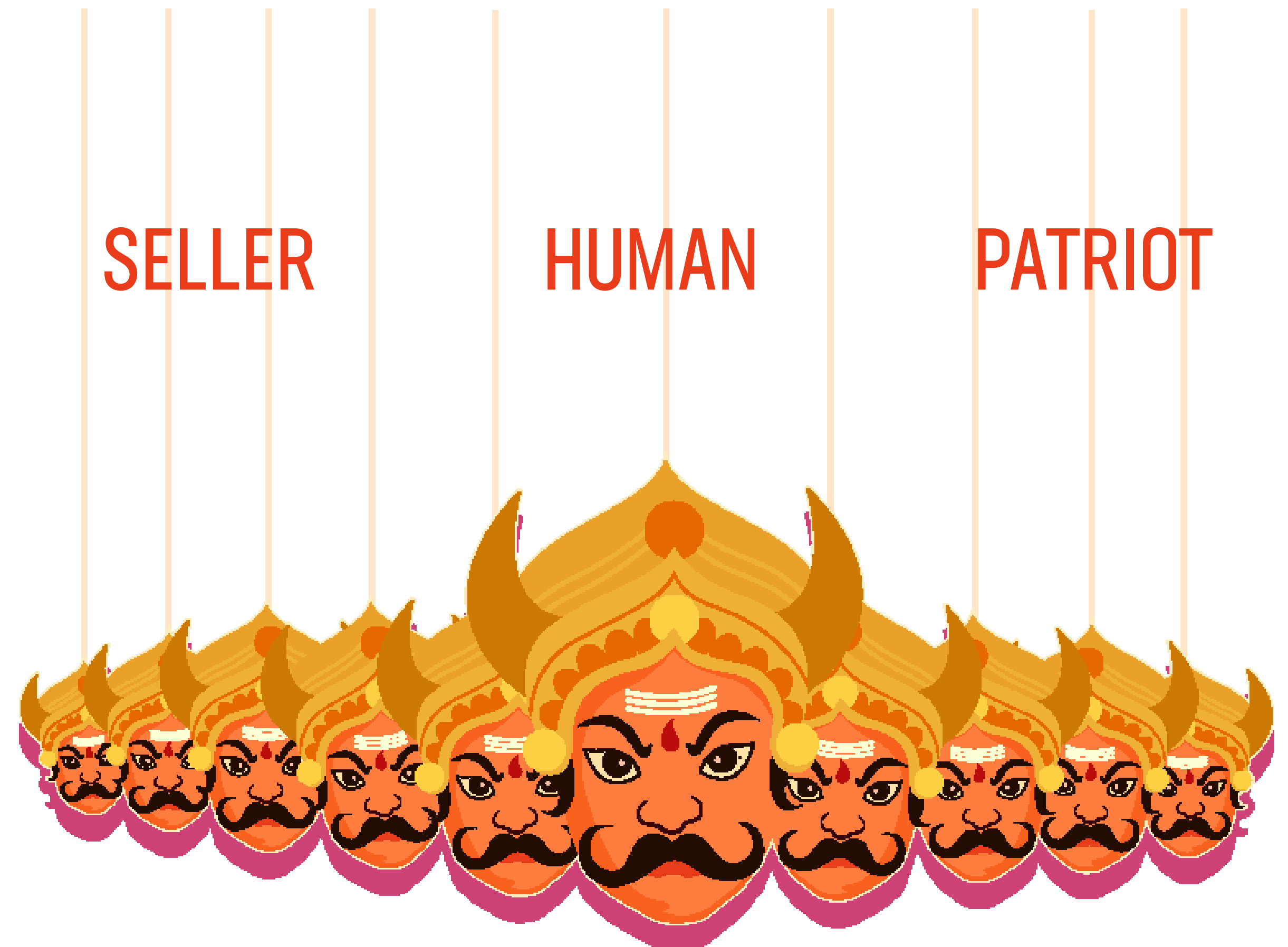
# CMA Ideologies and Consumption

- In the pre-covid past, the Consumer was King and the prevailing ideologies of consumerism, materialism and aspiration (CMA) were the engines driving consumption. Now, the CMA ideologies have taken a backseat and the consumer is stressed and fearful (beleaguered).
- Now that the consumer has experienced or fears loss of income and spending power, how will their consumption change? Will they do simple downtrading? Or will they buy less but of higher quality? Will they seek affordable indulgences to retain the feel-good factor about consumption?
- If the extra pre-cautions for absolute safety create joyless experiences of travel, eating out and shopping, how can the consumer bring back joy and pleasure into their experiences?
- An essentialist mentality is being imposed, focusing consumption on needs. Will wants and desires be entirely suppressed?
- What is the right balance of safety and pleasure in brand communication that will build consumer confidence and activate demand?



# The Humanist Brand and Communication

- In the pre-covid past, Brands were entirely focused on selling products, commerce and business. Brands only thought of people as shoppers and consumers. During the Lockdown, brands shifted their stance away from commerce to humanism and patriotism.
- Now that a longish period of 'living with the virus' / the Covid Economy can be anticipated, what should be the stance of brands?
- Should they drop their humanistic and patriotic stance and go back to selling and commerce? Would this not be regarded by consumers as being insincere and hypocritical? And thus erode trust.
- How can brands achieve the right blend of values and tonality for the various stages of the Covid Economy? To retain consumer trust and affinity?
- How do they retain the tonality of sensitivity and empathy while still making a hard push for sales? How do they navigate the fine line between political correctness, genuine concern for people and the imperatives of sales? Should they adopt a softer tonality (which may not sell as well) or a hard hitting tonality (more impactful for sales)?



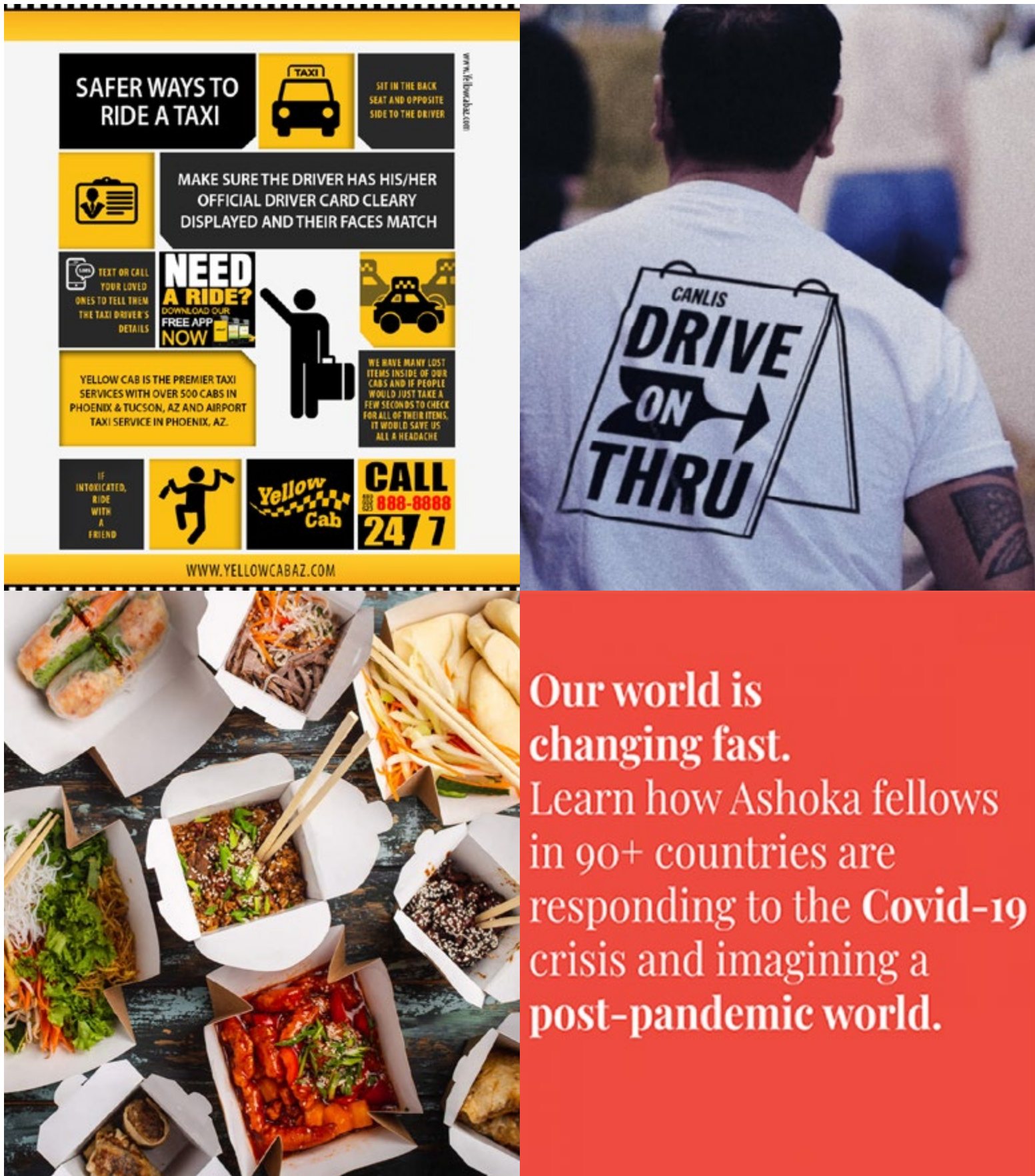


# How the Leapfrog Team can help you in your efforts to adapt to the changing context and regenerate growth

Deep dive into Safety Codes to get to the **right balance between safety, confidence and pleasure** in your category.

Deep dive into **Affordable Indulgences**: Premium and Aspirational while still delivering Value.

Identify how to use these signs and codes in your packaging and communication



Semiotic Brand Audit to identify **under-leveraged yet relevant Qualities and Values of your Brand** that are particularly relevant today.

Getting to the **Right Tonality in communication**, especially for specific audiences. Identify the right communication codes to use.

Identify how best to leverage your brand as a symbolic asset in culture.

Identify how to create the most effective communication



# THE TEAM



**HAMSINI SHIVAKUMAR**  
Co-Founder of Leapfrog Strategy,  
Director & Lead Semiotician

Hamsini has over 30 years of experience spanning quantitative and qualitative consumer research, brand strategy planning, communication and Semiotics. In her last corporate role, she was the Head of Strategy Planning at JWT, Mumbai.

She co-founded Leapfrog in 2007 and also co-founded Semiofest, the world's only global event for Applied Semiotics.



**RASIKA BATRA**  
Cultural Analyst and Semiotician

Rasika works as a Hyphenated Specialist and a culture funnel at Leapfrog.

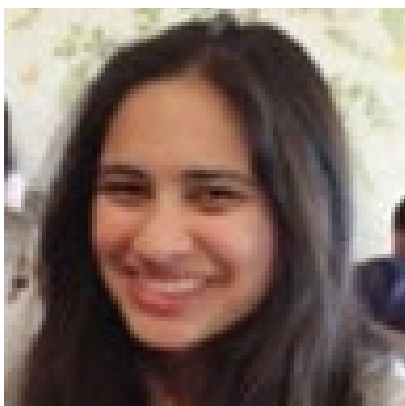
In the last 24 years, she has worked as a qualitative research consultant across several categories - FMCG, E-commerce, Health, Education, Technology, Social development all while employing multiple methodologies.



**SUMEET ANAND**  
Semiotic Analyst

Sumeet is a Marketing Semiotics professional with prior work experience across market research, consumer insights and brand management.

He has worked to provide Semiotics-driven solutions in brand communication, consumer segmentation, product packaging, service delivery, usage and attitude.



**AARUSHI CHADHA**  
Junior Analyst

Aarushi is a writer and research analyst in training. She previously worked to create branded content within the field of content marketing.

She is now increasingly involved in client projects that focus on areas such as brand/product repositioning and emergent cultural codes.



**PRANAB BOBO DUTTA**  
Creative Director + Artist

Pranab began his career in national media with India Today in 1990, and has since worked with leading Indian dailies and magazines.

After spending the next few years as the Creative Director of Discovery Networks International, he started Great Latitude, his graphic design studio, in 2005.

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# THE RESHAPING OF INDIAN MINDS

## CITIZENS, CONSUMERS & BRANDS