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Final Assignment:

"Safely navigating the marketing challenges

in today's many Indias".

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Final assignment: "Safely navigating the marketing challenges in today's many Indias".

Abstract:

India can present with staggering macro-economic figures which need further assessment, and refinement, as for their role and meaning in shaping entry strategy and market penetration. Success will depend, and rely on, the accurate level of their understanding, handling and anticipation.

Market segmentation based on highly relevant cross socio-demographic criteria can be envisioned, yet fine-tuning the appropriate marketing approach to reach those, with a "clear cut" product offer and strategy, shall be understood as remaining quite challenging for the years to come. As such, the Indian market, attractive as it is in rough numbers, cannot be synonymous with a simple market expansion, whereas products, support material, delivery and pricing schemes need only be fine-tuned to accommodate local tastes matching with consumers' eagerness to buy. The astonishing numbers, country's history, social sensibility and newly unearthed level of expectations of its population, shall be counterbalanced with a customer-centric strategy of focusing on relationship innovation.

To achieve meaningful differentiation building both scale and depth is particularly relevant in India because of the diversity of the country. Building scale requires serving the particular interests and tastes of many different consumer segments, which shall be best handled through the joining of forces with a/several local business partner/s. Conveying the right socio-cultural messages, in the right languages, takes local roots, local knowledge and connections, important factors for success in any market, [yet] especially critical in India because of complexity and diversity.

Today the aspirations of rural India are not very different from those of urban India as both are consuming the same content. From cars, to fashion accessories, to lifestyles, they have similar desires. India is a country that's hospitable to brands. Indian consumers like brands. Both new entrants and existing Indian brands face similar market opportunities. These include: reaching the growing number of consumers now able to purchase products and services; and communicating both to the mass market and to market segments, which have economic scale in India. Yet the country splits into six roughly homogenous geographic clusters that inform how consumers respond to advertising.

However as the market evolves and customer expectations increase, city or geography centric service levels are becoming the need of the hour. The future competitors and winners in the e-retailing space will be the ones which will use both bricks and clicks and not bricks or clicks alone. Value growth is primarily pull-driven rather than distribution-led, indicating significant growth potential.

Brands are responding with schemes to make their products and services more accessible. Merely cheap will not lead to product sales, consumers are very demanding when evaluating value such as functions. A growing sensitivity towards the service aspects is visible from the nature of issues cited by the consumers.

Assessing how to penetrate the "Incredible Indias" market takes quite a bit of data gathering and multilayered analysis, to allow for its first level of understanding. While its macro and meta data show a market dynamism, a closer analysis of its consumer population shows however more complex, multi-dimensional, consuming mindsets to master. Blurred borders between rural and urban, traditionalism and modernism, national, regional and local habits, cultures, vindications, expectations and opportunisms render the task relatively demanding and challenging.

Introduction

When thinking about India, pops immediately in mind the tagline, sounds, colors, and pictures associated with the "*Incredible India*" promotional campaigns, which were aired the world over, globally (period 2002-2009) and locally (period 2007-2009), under the auspice of Amitabh Kant, at that time Joint Secretary, Ministry of Tourism[1]. Having also previously traveled to the country of India, in 1999 and 2007, from the Southern States (Tamil Nadu, Kerala), to Tier 1[2] cities (Chennai, Mumbai, New Dehli), and to the North State of Jammu and Kashmir, while coming from France, I have personally witnessed as well many sides of India. Yet, I am certain of having discovered only a few in quantities when considering how diverse (as several authors famously put it) the "*many Indias*" can be.

The purpose of my stay at the Amity University, Noida Campus, attending the "Marketing in India" seminar in late 2014, was for me multi-purposed. To update and renew my understanding of India, for first, while encompassing many new academic and skillful knowledge, as well as garnering unique "*skills and abilities to understand and analyze prevailing key marketing issues and practices in India*", as applied from the seminar's syllabus. On the base of the seminar's learning outcomes, the present document shall aim at offering a marketing case focused on (A) "*Identifying the marketing challenges to be faced in India, keeping in view the distinctive consumer tastes and preferences*", while (B) "*Developing suitable market entry and marketing mix strategies to make it a sustainable Indian brand*".

To that end, I have chosen the (fictitious) case of a French two-wheelers helmet manufacturer (illustration on the right[3]), aiming at entering the Indian market with a new concept (Bluetooth and FM connected helmets), a set of dedicated brands and a specific local setup. For that purpose, and in order to present the Board of Directors with a sound analysis, I shall be gathering facts, emit hypothesis and make recommendation on how to envision a successful entry into this highly dynamic market segment in India. The company shall be set as an International Joint Venture[4] with a name purposely labelled "Golden Paris helmet Ltd" (GPHL) or "গোল্ডেন প্যারিস শিরস্ত্রাণ লিমিটেড" in Hindi[5], as the rough translation of my family name

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[1] Retrieved February 02nd, 2015, from http://www.incredibleindiacampaign.com/

[2] Tier-I cities with 1,00,000 inhabitants and above. Currently 8 cities in India. Retrieved February 1st, 2015, from http://rbidocs.rbi.org.in/rdocs/content/pdfs/100MCA0711_5.pdf

[3] Retrieved February 01st, 2015, from http://www.moto-net.com/

[4] Noun: *A joint venture is a legal organization that takes the form of a short term partnership in which the persons jointly undertake a transaction for mutual profit*. Retrieved January 17th, 2015, from http://www.law.cornell.edu/wex/joint_venture

[5] Hindi remains the most spoken mother tongue in the country. Overall, around 41.03% of the population declared Hindi or its sub-groupings as its mother tongue (2001 census). Retrieved January 14th, 2015, from http://timesofindia.indiatimes.com/india/Nearly-60-of-Indians-speak-a-language-other-than-Hindi/articleshow/36922157.cms

(Dorey) meaning "gold covered" or "golden" in English, associated with Paris (of France), and Helmets, which can then be carried out in Hindi as synonymous of "*valuable, precious, valued, invaluable, rich, golden*[6] *helmets from France*". More importantly, it was found that a family name (on a product and service) shall assure Indians consumers with "*promises of quality and reliability, even across unrelated categories*"[7] while the "frenchness" of its origin shall be combined with a proximity to its market (e.g. "Designed in France, Produced in India").

To strengthen the brand accuracy, visuals (logotype) shall support the brand communication and reinforcement, for literate as well as illiterate consumers, with the use of a "rooster", as both for the symbol of France (Gallic cock) and as the attribute of Skandha, personification of solar energy[8] in India. The "Can Stock" illustration on the above-left being very close to the spirit.

To support the brand positioning, a tagline shall be associated with the company's name, as in "*Golden Paris helmet Ltd – Successfully connected, sound and safe*" (translated into the main regional languages of targeted areas) where the choice of words should resonate at different levels, within the target groups (i.e. emerging young and young active) as shown on **Figure 1**.

	Merriam-Webster dictionary[9]	**Further association**
Success	*"the fact of getting or achieving wealth, respect, or fame"*	Professional & social ambition
Connection	*"a political, social, professional, or commercial relationship"*	Social & professional bases for success
Sound	*"showing good judgment or sense"*	Bluetooth & FM connection. Solidity & strength
Safe	*"secure from threat of danger, harm, or loss"*	Helmet, Gods, insurance protection
Paris	*"capital city of France"*	Fashion, world capital, savoir vivre

Figure 1: Brand positioning, definitions and associated meaning in the Indian context

It is worth noting that the "www.sound-safe.in[10]" or "www.sound-safe.com[11]" URLs, are currently available, and could be used in conjunction with online (institutional) brand communication, especially when

[6] Retrieved January 28th, 2015, from https://translate.google.fr/#en/hi/golden
[7] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p36. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[8] Retrieved January 31st, 2015, from http://library.acropolis.org/the-symbolism-of-the-rooster/
[9] Retrieved January 31st, 2015, from http://www.merriam-webster.com/dictionary
[10] Retrieved February 01st, 2015, from https://in.godaddy.com/domains/searchresults.aspx?ci=83269&isc=gofhfhfr08
[11] Retrieved February 01st, 2015, from https://in.godaddy.com/domains/searchresults.aspx?ci=83269&isc=gofhfhfr08

stressing the "safety side" of helmet protection, as later explained. Specific names will further position each product offer more precisely within their sub-target groups, as detailed later.

It is also interesting to bear in mind that the benefits associated with the brand and logotype combination will allow for a more global use, as they appear to be seen as a virtually universal solar symbol. Indeed as the rooster's crowing announces the dawn, across many places, times and religions, the world over, its cultural association can cross many borders without many social and cultural sensitivity issues. Consequently if successful in India, it could be spread over in Southeast Asia, Africa and other emerging markets where the "*experience of Indian brands prepares them to serve the needs of value-focused consumers*[12]".

Attractiveness of India

While not able to explain in intricacy the many characteristics of India, as my in-depth experience and knowledge of this fascinating country remain still relatively limited to these days, I have chosen to focus on Meta data, as a more appropriate way of handling such a variety of information. **Appendix A** gathers few indicators which have been thought of as being of relevance to represent the specificities of the market we would like to address with our two-wheeler helmets. Indeed, India can present with staggering macro-economic figures which need further assessment, and refinement, as for their role and meaning in shaping entry strategy and market penetration. Success will depend, and rely on, the accurate level of their understanding, handling and anticipation.

The collected figures clearly show how attractive a country India has become in the recent years, due to its sheer size, large numbers and growing expectations (e.g. population, GDP growth, and income pyramid wise). It is especially so in the face of (A) the structural downturn witnessed in the western world, and in Europe especially, for almost half a decade now, (B) the increasing (new information and communication technologies led) globalization, and as (C) a direct result of the "*the economic reforms initiated in 1991 [which] introduced far-reaching measures, which changed the working and machinery of the economy*"[13]. Market segmentation based on highly relevant cross socio-demographic criteria can be envisioned, yet fine-tuning the appropriate marketing approach to reach those, with a "clear cut" product offer and strategy, shall be understood as remaining quite challenging for the years to come. It appears true that "*India's history, culture, and democratic values make it a tolerant country open to new ideas*[14]", yet one shall "*make sense of the "many Indias" to*

[12] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p14. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[13] Retrieved January 21st, 2015, from http://indiainbusiness.nic.in/newdesign/index.php?param=economy_landing/217/2
[14] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p19. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

succeed in complex market. The [Indian] market is composed of a number of distinct socio-economic clusters, each different from the other, characterized by homogeneity in tastes and culture across different demographic strata – probably caused by the deeply embedded codes of India's ancient civilization[15]*".*

On a closer market-segment oriented level of data analysis, and to focus more on the dynamism of its sub market, the **Appendix B** shares some of the opportunities presented in India by the two-wheelers market, a tremendously important, nearly oligopolistic by nature (yet growing) market, where key Indian players are eager to use India as a springboard for ambitious international expansions. **Appendix C**, specifically, focus on some of the reasoning behind why the two-wheeler helmets market was chosen as a good study case for new product entry into India, especially in the light of the dramatic incidences (still to these days), or the lack of enforcement and proper education of two-wheelers' drivers, and the subsequent low rate of helmet wearing habits, as illustrated by the picture below.

While the market growth showed a little slowdown in 2012-2013, recent averaged growth rate and forecast are clearly positive about its outcome in the coming years. If the situations in the largest cities in the western world are any indication of it, uncompressible traffic and congestion are pushing time-starved four-wheel drivers to switch, in large numbers, to two-wheelers. Convenience taking over driving habits, prestige and comfort.

Outside of the urban area, two-wheelers still represent an affordable access to "freedom[16]" (of move) for many young westerners (mopeds and scooters), eager to expand their reach and autonomy, while in the whole, bike and touring scooter owners remain among the few on the western roads to still claim an unmatched "closeness" to Mother Nature, associated with (leisure) transportation.

The undeniable role, on the two-wheelers worldwide markets, India is enjoying, gives its key manufacturers a strong marketing clout to expand within, and outside[17], their home country. Within their borders, their challenge is to come to the market with savvier bikes (e.g. improved fuel efficiency, upscale design and enhanced safety features) pushing for greater products upscaling. Together with reinforced public education, "pull" marketing tactics (from e.g. insurance companies, two-wheeler makers, gear and accessories

[15] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p168. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[16] "*Find your freedom*". Retrieved January 28th, 2015, from http://bikes.honda.co.uk/motorcycles/range/scooter.html

[17] "*Indian Motorcycle brands, like Hero, Bajaj, and TVS are expanding into Southeast Asia, Africa, and other developing markets where the experience of Indian brands prepares them to serve the needs of value-focused consumers*". Retrieved January 21st, 2015, from Millward Brown,

producers) and (Regional Transport Office) compulsion, two-wheelers shall turn into a more democratic, less risky, and reliable means of (social and distance) transportation.

Down the line, two-wheelers shall be perceived as an answer to the more aspirational needs (e.g. expanding lifestyle demands, pursuit of individual ambitions[18], as illustrated above-right) of a younger, broader, spectrum of people (e.g. women, young adults), and less of a mere transportation means. It will then translate into further sales, as forecasts show, which in turn will drag further up sales of accessories and gears, among which helmets are playing a key part too, especially when some Regional Transport Office are putting efforts into making mandatory, the sales of helmets "*along with bikes and scooters*[19]". To assess how the rules of law, and their lack of obedience, have played little a role into achieving their purposed objectives, **Appendix D** synthetizes some of the key comprehensive measures taken to lower road safety liabilities and their direct transgression.

As such, and as envisioned through the above mentioned Appendixes, the Indian market (for any product), attractive as it is in rough numbers, cannot be synonymous with a simple market expansion, whereas products, support material, delivery and pricing schemes (marketing mix) need only be fine-tuned to accommodate local tastes matching with consumers' eagerness to buy. The astonishing numbers its macro data can leverage, the country's history, its social sensibility and the newly unearthed level of expectations of its population, shall be counterbalanced with a humble, yet ambitious, "*customer-centric strategy of focusing on relationship innovation*[20]".

Entering India

« *In India, if you can create a product or service, you can find a market for it. You need to create desire and deliver an affordable price. Don't assume your market is limited to the wealthy. It's not only the middle class in the cities who have aspirations. Less well-off people in both the cities and rural areas are eager for the good life. Figure out a way for them to afford the piece of the good life that you're selling. Yet don't expect to simply repackage a global product and sell the same formulation successfully to 1.25 billion Indians*[21]".

With that promise in mind, the market dynamics, and necessary alignment between consumer aspirations (Micro) and the strong need (Macro) to fight road, and individuals, safety hazards help create a

"Brandz™ TOP 50 Most Valuable Indian Brands 2014", p14. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[18] Forbes India, The Best Things Money Can Buy http://forbesindia.com/column/column/aspirational-global-luxury-brands-descending-on-indian-market-in-huge-numbers/38927/1#ixzz3Qodb91TS

[19] Retrieved January 27th, 2015, from http://timesofindia.indiatimes.com/city/bareilly/RTO-Sell-ISI-mark-helmets-along-with-two-wheelers/articleshow/45669705.cms

[20] Retrieved January 17th, 2015, from http://www.pwc.in/india-entertainment-media-outlook/index.jhtml

[21] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p24, p26. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

(windows of) opportunity to enter India, with a two-wheeler helmet line, of the "Golden Paris helmet Ltd" (GPHL) kind. Such a line shall primarily target two large customer's groups, namely the combined 46.8 million strong "middle high and middle low" income earners, to be found among, in and around the 74 (HRA) Tier 1 (X) and Tier 2 (Y) cities, initially. It is worth noting that members of India's rising middle class are willing to "*share the Indian dream, to prosper individually and as family*[22]" while "*the first traditional belief shed (in the metaphorical sense of migrating to newer attitudes and lifestyles) is fatalism. Accepting your lot in life is passé and creating a better life is in*[23]". While clearly matching with our product positioning, the product features (marketing mix), and promoting of our product line shall ensure a unique selling proposition (USP) aiming at bridging the gap between, and expectations of, the many "stakeholders" (e.g. insurance companies, authorities, motorcycle makers and owners) involved on the two-wheelers Indian market.

To achieve meaningful differentiation, "*building both scale and depth is particularly relevant in India because of the diversity of the country. Building scale requires serving the particular interests and tastes of many different consumer segments*[24]", the peculiar market situation shall be best handled through the joining of forces with a/several local business partner/s. Indeed, in a country like India(s) conveying the right socio-cultural messages (among the 62 carried socio-cultural regions[25]), in the right languages (among the 29 individual ones with more than 1 million native speakers), takes local roots, local knowledge and connections, "*important factors for success in any market, [yet] especially critical in India because of complexity and diversity. Success requires getting the subtleties right*[26]".

Furthermore, with the emergence of hybrid models leveraging online and offline presence to target consumers in Tier 2, Tier 3, Tier 4 towns and rural areas[27], association with local "e-players", is deemed mandatory as "*in India, foreign direct investment (FDI) within the business-to-consumer (B2C) e-commerce segment is not allowed, whereas foreign investment in the business-to-business (B2B) e-commerce segment is*[28]". To that, one shall also bear in mind that trust and reliability are the most critical attributes for a brand to possess in India, relative to other country markets, as research suggests. "*Closing any gap between the brand promise and the delivery of the promise builds trust*[29]" while "*in culture, Indian conglomerates respect*

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[22] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p22. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[23] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p56. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[24] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p24, Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[25] Retrieved Dr. Kokil Jain, Session 1&2, "Cultural diversity", Slide #11, November 12th, 2014

[26] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p36. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[27] KPMG Retail leadership summit 2014, p3, Executive Summary. Retrieved January 17th, 2015, from http://www.kpmg.com/IN/en/industry/Documents/RAI-Retail-14.pdf

[28] Retrieved January 17th, 2015, p6, from http://www.pwc.in/publications/publications-2014/evolution-of-e-commerce-in-india-creating-the-bricks-behind-the-clicks.jhtml

[29] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p27. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

tradition and family; in operations, they adopt the most up-to-date, global best practices[30]". This duality is part of what makes them successful and particularly Indian. Piggybacking on short to medium term agreement, and/or learning through the wisdom local (off and online) players have gathered along the years, in the longer run, shall be the key into a successful implementation of the company's region-centric (multi-domestic marketing) internationalization strategy.

Given that the Indian market is highly price sensitive, and that India's tax on imported products still remains high[31], for many consumer goods, it is necessary to procure parts and components locally and use local production facilities in order to minimize production and transportation costs. Because of India's large physical size, it is necessary to have optimum stock meeting local demand warehoused in each area. Joint-Venturing (IJV), on the production side with either OEM[32] and/or local "fitters[33]", and on the distribution channels with both franchisees and third party logistics[34], will help constantly monitor the supplier base across the country to achieve low transportation cost by ensuring delivery from the nearest supplier or regional warehouse (as the Indian online mall Flipkart has successfully been doing[35]). However a major problem presented in doing so is "*whether industrial sites where infrastructure such as access roads, electricity, water gas and housing has been well developed are available*[36]". Tackling this ongoing issue will represent a clear challenge when entering the Indian market together with the fact that (because of India's rural character, with about 72.2% of its population living in rural area, with languages and traditions that sometimes change within short distances), "*brand preferences change too. Brands face two clear and opposing opportunities: growth by consolidating regional brands into powerful national brands; and growth by developing regional brands which, in India, can have economic scale.*[37]" Being a foreign brand, building a recognition on the market shall take creative (bottom-up) promotional strategies and alliances, driven locally in their local contexts.

[30] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p36. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

[31] Retrieved January 17th, 2015, p10, from http://www.dutycalculator.com/hs-code-duty-rate-import-restrictions/650610/motorcycle-helmet/6506.10.6030/6506.10.1000/673/

[32] Noun: *Original Equipment Manufacturer; a company whose products are used as components in another company's product*. Retrieved January 17th, 2015, from http://www.investopedia.com/terms/o/oem.asp

[33] Noun: *Someone whose job is to repair or put together equipment or machines*. Retrieved January 17th, 2015, from http://dictionary.cambridge.org/fr/dictionnaire/britannique/fitter

[34] Noun: *Third Party Logistics (3PL) is the activity of outsourcing activities related to Logistics and Distribution. A 3PL is an outsourced provider that manages all or a significant part of an organization's logistics requirements and performs transportation, locating and sometimes product consolidation activities*. Retrieved January 17th, 2015, from http://www.logisticslist.com/3pl-definition.html

[35] Retrieved January 17th, 2015, p7, from http://www.pwc.in/publications/publications-2014/evolution-of-e-commerce-in-india-creating-the-bricks-behind-the-clicks.jhtml

[36] Retrieved January 17th, 2015, p10, from https://www.nri.com/~/media/PDF/global/opinion/papers/2014/np2014193.pdf

[37] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p14. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

Marketing challenges

As in many Asian (and other emerging) countries, motorcycles are a way of life in India. In rural areas "*they provide reliable and affordable transport for the poor, while in urban areas they are useful to all social classes for travelling through the congested streets*[38]". Yet, in the words of Indian writer Pico Iyer, "*Today the aspirations of rural India are not very different from those of urban India as both are consuming the same content. From cars, to fashion accessories, to lifestyles, they have similar desires*[39]". Despite the popular misconception, talking to people from rural India as if they're "small-towners" is patronizing and a business mistake. This translates into building a brand experience "*as the only sustainable advantage in a crowd of like competitors. A company shall offer a uniquely branded customer experience relevant to their needs*[40]".

Product offer

While not going into thorough details as for the technical and production specifications of the two-wheeler helmet offer, my main idea and starting point in picking up this product line was to offer a protective helmet allowing for (A) possibilities to listen (while driving) to one of the 242 private FM Radio Station[41] in India and (B) Bluetooth connect with any (paired) mobile phone device allowing for either radio/mp3 listening and/or a signaling beep of all incoming mobile call. The radio FM feature will come through a factory fitted, in built antenna, tamper resistant (volume limited) FM reception system, fitted with an external tuning control knob, manageable with hands/gloves, so to adjust stations. The Bluetooth mobile phone connection will be offered through the same external control knob allowing (by simple pressure, manageable with hands/gloves) call picking, with inner in-built mike and ear set allowing for phone conversation while stopped. In order to limit use of the impure left hand[42], the external knob shall be placed on the right side of the helmet, while the (unique) earplug shall be offered on the sole left side of the (inner) helmet, so to allow for any incoming (traffic) sound to be overheard, as they shall (mainly) come from the opposite (right) side of the road.

The choice of a "radio connecting feature" is not fortuitous, as indeed it is based on the fact that in India radio still play a dominant role in reaching the urban and rural masses and "*out of home listening continues to grow rapidly, truly making Radio the only "mobile medium" unlike TV*[43]" which will both add

[38]Retrieved January 17th, 2015, from http://www.automotivemanufacturingsolutions.com/focus/a-taste-for-two-wheels
[39] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p64. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[40] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p196. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[41] Retrieved January 28th, 2015, p ii, from http://www.trai.gov.in/WriteReadData/PIRReport/Documents/Indicator%20Reports%20-%20Mar-14.pdf
[42] Retrieved January 28th, 2015, from http://www.insightguides.com/inspire-me/blog/etiquette-in-india
[43] Retrieved January 25th, 2015, p30, from http://www.tamindia.com/webview.php?web=press_release/India%20Radio%20Forum%2027-5-2009%20ppt%20by%20RAM.pdf

audience time to radio (and advertisers) while allowing for further listening time to two-wheeler (urban and rural) drivers.

It is worth mentioning thought, that the Motor Vehicle Act, 1988, Section 177 restrains "*using Mobile Phones while driving*", as well as "*driving without Helmet*" with First Offence Fine up to Rs. 100 and Subsequent Offence Fine up to Rs. 300, while Section 190(2) restrains "*using Loudspeaker beyond specified limit*" with First Offence Fine up to Rs. 1.000 and Subsequent Offence Fine up to Rs. 2.000[44]. Nothing is said thought about not being able to listen to radio on two-wheelers, as it has been made possible for many years with cars, trucks and buses anywhere in the world.

While "Designed in France, Produced in India", the "Golden Paris helmet Ltd" (GPHL) line of two-wheeler helmets shall abide by the Helmet safety standards IS 4151 (Indian Standard, Bureau of Indian Standards, India)[45] in use nationally. Local production partners (OEM) and fitters shall be adequately following them, unlike many competitive players[46], while aiming at manufacturing goods within a local (highly regarded, the world over) context of Jugaad innovation[47]. An appropriate mix of design, styles, functions, materials, features and overall constrained costs of production being at reach.

Further to it, it will also be worth mentioning that Corporate Social Responsibility, in phase with all stakeholders' expectations, is becoming more and more of a "*relevant business function*[48]" in India. As a western born brand sensitive to those issues, CSR shall be among the key selection criteria of prospective production partners (OEM, franchised fitters). Even though, Indians are "*unlikely to adopt environmentalism en masse out of a sense of good citizenship, what will work for Indians, however, are practical demonstrations that sustainable practices yield personal benefits*[49]". Jugaad innovation and CSR shall be "advertised" dutifully. An observational study[50], indicated furthermore that when purchasing helmet, "*quality (66.0%), certification (15.2%) and brand/company name (7.7%) were given more importance than price (4.6%), style/look (2.6%) and colour (1.8%)*".

Additionally, standard measures witnessed within the two-wheelers helmet industry indicate an expected life duration of the goods of about five years (from purchase date) or seven years from manufacture

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44 Retrieved January 15th, 2015, from http://transport.bih.nic.in/Penalties.htm

45 Retrieved January 25th, 2015, from https://law.resource.org/pub/in/bis/S03/is.4151.1993.pdf

46 "*More than 85% of helmets used by two-wheeler riders across India do not meet ISI standards*". Retrieved January 28th, 2015, from http://timesofindia.indiatimes.com/india/85-helmets-used-by-riders-unsafe-Manufacturers/articleshow/12540580.cms

47 Jugaad (a word taken from Hindi which captures the meaning of finding a low-cost solution to any problem in an intelligent way) is a new way to think constructively and differently about innovation and strategy. Retrieved January 25th, 2015, from http://lexicon.ft.com/Term?term=jugaad-innovation

48 Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p16. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

49 Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p100. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

50 Retrieved February 02nd, 2015, from http://injuryprevention.bmj.com/content/18/Suppl_1/A197.2.full.pdf+html?sid=29742847-413a-4a60-a50c-6c6ddfca236d

date, whichever comes first. A “free inspection service” where consumers can send their helmet at no cost to their representatives for a free inspection could be envisioned, as well, as some players are already doing. It will then provide GPHL with plenty of possibilities for further consumer interactions, frequent repurchases (e.g. if damaged, worn out, outdated in style, technology), and increased brand fidelity[51] with the further benefit of a deeper involvement of the dealer/fitter network (sales and service incentivized through franchise).

Parallel to that, it has been noticed that increased urbanization and the rising number of female riders are pushing up sales of scooters in India. “*The scooter is more flexible and dependable than a motorcycle in towns and cities*[52]”, assessed Bajaj Auto Ltd’s (BAL), willing to boost capacity, as motorcycles are now predominantly bought in rural areas. While focusing on their core customer group, affluent young and middle-age men, it is worth noting that the world’s largest two-wheeler producer, the Indian motorcycle and scooter brand Hero MotoCorp, “*markets to women with a recently updated sub-brand called Pleasure. The brand tagline, “We have a hero inside us,” articulates the brand’s emotional appeal, that it helps people achieve their potential*[53]”.

That is where it will be worth considering coming to the market with a multiple (gender base) offer, where female helmets could be made attractive (e.g. styles, colors, sizes…) and offer small extras, such as front space for “Bindi[54]” decoration on the "face shield or visor" for instance. The women head (and overall) protection shall be given stronger consideration as a tribute for their growing role within the modern Indian society and as a “fashion” (or vindication) accessory in line with their aspirations (and respect for traditions). It is worth noting thought that in some States, helmets are “optional” for women motorcyclists where, on the base of religious considerations, (e.g. Sikh) women in Delhi[55] (as in many places in India) were granted exception (as illustrated above) to the law.

[51] *“Even in the automobile sector, 73%, the key factor driving changes in customer choices is the interaction with the salesperson at the dealer showroom*”. Retrieved from “Understanding the New Indian Shopper” 2014, by Adrian Terron, Executive Director, Nielsen India, Manoj Kulkarni, Director, Nielsen India.
[52] Retrieved January 21st, 2015, from http://www.automotivemanufacturingsolutions.com/focus/india-two-wheels-still-good
[53] Millward Brown, “Brandz™ TOP 50 Most Valuable Indian Brands 2014”, p93. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[54]Retrieved January 07th, 2015, from http://en.wikipedia.org/wiki/Bindi_%28decoration%29
[55] Citing religious protests to the legislation, Delhi's high court exempted the city's 12 million women from the law. Retrieved January 27th, 2015, from http://www.thehindu.com/news/cities/Delhi/helmets-now-must-for-women-pillion-riders-in-delhi/article6362699.ece

Promotional tactics

As we have already gathered, many stakeholders are involved in India's two-wheelers helmet market. As such, it shall be all players' interest to see volumes of sales (and incentivized use) increase tremendously while road-related fatalities may decrease accordingly. A national, and/or States led, three sided promotional ("sound and safe") campaign could be envisioned with the main purpose of getting the message right for two-wheeler owners, which is that "safety concern, concerns all" and that a pool of 3 key France-based players have decided to unite into offering a unique promise to India (pull marketing). Indeed, a pool of French players could be constituted with the combination of the Indo-French liability insurance Bharti AXA[56], among the top two wheeler insurance policies in India[57], the Mahindra's Two Wheelers division, nowadays majority shareholder of the French Peugeot Motorcycles[58], and ourselves (Golden Paris helmet Ltd), offering specific incentives (e.g. vouchers, rebate on either insurance, two-wheeler, or helmet, free inspection and attractive swapping, retrofitting or upgrading schemes for older helmets), and associated sales support and training (franchising) so to lower the overall cost of, and deterrent for, acquisition of safety coverage gears and/or service. A private initiative which could be further strengthened with private support of e.g. local radios (sponsoring), two-wheeler makers (co-branding), among others, and public authorities (local or national) directly involved with road safety. All in all acquisition price should be made much more affordable to (middle-low income) consumers, while sensitivity and care to simple safety gear should be (leisure driven) emphasized.

On the brands building side, the overall positioning of the GPHL line shall been seen as a key strategic move so to enhance the products positioning and rapidly engage into consumers product acceptation and brand recognition. Indeed, India is a country that's hospitable to brands. "*Indian consumers like brands. They have long experience with brands. Both new entrants and existing Indian brands face similar market opportunities. These include: reaching the growing number of consumers now able to purchase products and services; and communicating both to the mass market and to market segments, which have economic scale in India*[59]" and as the global Indian smart phone brands, such as Micromax, Karbonn and Lava have done, the GPHL line could gain credibility, in part by using international celebrities as brand ambassadors "*to suggest parity between Indian and global brands*[60]". More than just picking any French (global but costly) celebrity and

[56] "*Bharti AXA General Insurance Company Ltd is a joint venture between Bharti Enterprises, a leading Indian business group and AXA, a world leader in financial protection*". Retrieved January 17th, 2015, from http://www.bharti-axagi.co.in/promoters
[57] Retrieved January 17th, 2015, from http://business.mapsofindia.com/insurance/automobile/two-wheeler.html
[58] "*Mahindra acquires 51% stake in Peugeot Scooters*". Retrieved January 17th, 2015, from http://www.zigwheels.com/news-features/news/mahindra-acquires-51-stake-in-peugeot-scooters/20824/
[59] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p17. Retrieved January 17th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[60] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p14. Retrieved January 15th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

aiming at having her/him promoted in India, teaming with the French-Indian actress, Kalki Koechlin [61], could symbolize this "astute gap bridging" and support the company's moto. Born to French parents in a small village in Pondicherry, she indeed became a "*familiar figure in the Bollywood fraternity owing to her distinctive looks and acting ability*[62]". Having her as the brand ambassador could help get a place on the market both as a foreign and a local (India committed) brand, attractive to women, young and active aspiring customers, identifying themselves with the brand, and international aspirations.

On the products branding side, and if market tests confirm the absence of offense to believers, the use of Indian Deities's name (Adityas) on specific products line, could support the brand acceptation further, by communicating directly to the consumers' mind and spirits. When thinking about male two-wheeler owners, a range of helmets named "Pushan" ("Pūṣan"), patron god of travelers and herdsmen, god of roads[63] could be thought of, while for women drivers, the product appellation "Dhūti" ("Dhātṛ"), god of health and magic[64] could be picked. For junior pillion passengers, "Bhaga", god of wealth[65], could be used for its strong symbolism with the present and future familial enrichment children do represent. The overall idea being to strengthen the message of "safety concern, concerns all", and play on the "soft values" contained within each consumer.

When thinking about which media to use to carry the brands, an overwhelming choice is offered to advertisers, as gathered on **Appendix E**. Indeed traditional media do present potential advertisers with a highly comprehensive panel of global and (down to narrow) local supports, which can (and shall) be combined with (global and individualized) online media, and local sub-cultural adaptations, for better effectiveness. The country indeed splits into six roughly homogenous geographic clusters that inform how consumers respond to advertising. "*While the appeal of children in slice-of life situations is universal across clusters, celebrity appeal differs. TV personalities work in Mumbai but not in parts of Uttar Pradesh in the North. Similarly, appeals to the heart work in Delhi, but an appeal to the head is necessary for an ad to work well in the South. Glamour and style works well in Delhi, but a more subtle expression of sensuality, perhaps a dewdrop on parched skin, works in West Bengal*[66]". However, if a company launches mass promotions such as advertising through TV, newspapers and magazines in an attempt to cover a large proportion of the population, a huge cost would be incurred, and shall be either budgeted for, or necessary compromises reached when decisions are taken. Understanding these phenomenon is critical for brand success in India, as well as addressing the youth (e.g. through App, SMS text, mobile Videos, blogs, social media), with the right level of significance

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61 "*Awarded the Hindu's 2009 MetroPlus Playwright Award*". Retrieved January 15th, 2015, from http://www.imdb.com/name/nm3202701/bio
62 Retrieved January 15th, 2015, from http://www.koimoi.com/actress/kalki-koechlin/
63 Retrieved January 15th, 2015, from http://en.wikipedia.org/wiki/Hindu_deities
64 Retrieved January 15th, 2015, from http://en.wikipedia.org/wiki/Hindu_deities
65 Retrieved January 15th, 2015, from http://en.wikipedia.org/wiki/Hindu_deities
66 Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p171. Retrieved January 25th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

(as in word of mouth and consumer reviews). "*For brand marketers who want to reach today's Indian youth, the following themes are likely to resonate with them: advocating for positive social change, indulging in unique and engaging experiences, and expressing creativity in pursuit of success*[67]". Furthermore this target group is typically young, upwardly mobile, and represent consumers with high exposure to the media and brands. As a result, this segment is generally aware of, and demands, superior products and service delivery, which GPHL shall provide.

As such a hybrid on, and offline, promotion strategy shall be built in India, mixing traditional media (for the masses), social networking and online brand communication. Web searching and Video watching taking about 90% and 65% respectively of their time online, as gathered by The Digital Marketing Institute[68]. The main source of information of Indian consumers remaining advertisement, it is interesting to note that mobile marketing seems to be "*the next big platform for brands in India. Especially in rural areas, where illiteracy and erratic electricity supply sometimes hamper traditional marketing platforms, marketers need to leverage mobile's advantages. Consumers don't consume media one medium at a time anymore. Marketers need to develop more creative strategies to reach the consumer*[69]". In a survey about rural consumers' preference attributes in the purchase of two-wheelers, Sureshrajan, and Selvachandra (2011) found that "*based on the socioeconomic changes, the rural consumers were found to be well-informed regarding the purchase. They had the capacity to analyze various factors before purchasing the product*", which stresses the needs of global and local ("Glocal[70]") advertisements.

Additionally, and as gathered, smart deals can change the minds of "*between a fifth and half of all shoppers across several product categories. Between a third and two-third of buyers hook up to the Information Superhighway as part of their pre-purchase activities. Hunting for information on the Web is extremely popular. Importantly, influential affluent shoppers rely on the Internet for their information, highlighting the need for companies to build brands online*[71]". The ROPO (Research Online, Purchase Offline) method being well spread out in today's mode of access of the youth, as detailed below.

Placing strategy

In today's India, distribution is facing a new paradigm. The Retail Sector of Indian Economy is going through a phase of tremendous transformation. "*The retail sector of Indian economy is categorized into two*

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[67] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p169. Retrieved January 25th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[68] Retrieved January 15th, 2015, p20, from http://thedmti.com/images/India_on_Internet_2015.pdf
[69] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p28. Retrieved January 25th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
[70] Noun: *the practice of conducting business according to both local and global considerations.* Retrieved February 10, 2014 from http://www.oxforddictionaries.com/definition/english/glocalization?q=glocalization
[71] Retrieved January 15th, 2015, p1, p3, from http://www.nielsen.com/content/dam/corporate/india/reports/2012/Featured%20Insights_Understanding%20India%27s%20New%20Breed%20of%20Shoppers.pdf

segments such as organized retail sector and unorganized retail sector with the latter holding the larger share of the retail market. Regulatory controls on Foreign Direct Investments (FDI) have been relaxed considerably in recent years. Currently the government allows 51% FDI in single brand retailing and 100% in cash-n-carry business", as shared by Handa and Grover (2012). It is commonly assessed that between 93% and 96% of the retail is still unorganized in today's India, as compared to about 80% on average in Western Europe (including France) and 85% in the USA.

Parallel to that, e-commerce in India is forecast to "*grow by 400% between 2014 and 2016, to jump from about $3Bn to about $15Bn with electronics and apparels the main winners (with 34% and 30% penetration rate accordingly)*[72]" with purchases directed mainly on the Flickart, Snapdeal, Amazon, Jabong, Zovi, Yepme and eBay platforms. However as the market evolves and customer expectations increase, city or geography centric service levels are becoming the need of the hour. Yet, and for previously mentioned reasons of (industrial sites) deficient infrastructure in logistics, the future competitors and winners in the e-retailing space "*will be the ones which will use both bricks and clicks and not bricks or clicks alone*[73]". The time-starved (urban) consumers, for instance are ready to pay a premium for better services and value convenience, "*online apparel retailers are offering consumers the options of on the spot trial and return and customized delivery time*[74]".

That is where Flipkart, the leading Indian e-retailer (with about 20 million customers), has started its own logistics arm named e-Kart, providing a robust back-end support to Flipkart, ensuring timely deliveries. To that end, and in order to achieve the economies of scale, e-Kart also started "*providing back-end support to other e-retailers*[75]" which could represent a fair option to choose among in the building up of an (complementary) e-presence in India for GPHL. Indeed, emergence of hybrid models leveraging online and offline presence to target consumers in Tier 2, Tier 3, Tier 4 towns and rural areas, and the ability of the provider to leverage existing infrastructure, shall be the keys to profitably target such consumer segments. Consumption is already "*increasingly shifting to more "urbane" categories, driven by high aspirational values. Value growth is primarily pull-driven rather than distribution-led, indicating significant growth potential. Consumers are increasingly taking to online modes to meet aspirations in the absence of brand outlets*[76]".

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72 Retrieved January 15th, 2015, p35, p36, p37, p41, p42 from http://thedmti.com/images/India_on_Internet_2015.pdf

73 Retrieved January 17th, 2015, p8, from http://www.pwc.in/publications/publications-2014/evolution-of-e-commerce-in-india-creating-the-bricks-behind-the-clicks.jhtml

74 KPMG Retail leadership summit 2014, p17, Executive Summary. Retrieved January 17th, 2015, from http://www.kpmg.com/IN/en/industry/Documents/RAI-Retail-14.pdf

75 Retrieved January 17th, 2015, p8, from http://www.pwc.in/publications/publications-2014/evolution-of-e-commerce-in-india-creating-the-bricks-behind-the-clicks.jhtml

76 KPMG Retail leadership summit 2014, p26-27, Executive Summary. Retrieved January 17th, 2015, from http://www.kpmg.com/IN/en/industry/Documents/RAI-Retail-14.pdf

Closer to the two-wheelers helmet market segment, the Indian motorcycle and scooter brand Hero MotoCorp, the world's largest two-wheeler producer, operates a sales and service network of over 6.000 outlets located throughout the country. Yet to that, and as shared by Pawar and Khandelwal (2012), it is worth noting that "*mechanic plays the role of gatekeeper in the purchase of automotive lubricants*". They further stated that "*emphasis should be given by encouraging mechanics and providing incentives to promote the brand*", that is where "exhaustive information-sharing mechanism with mechanic opinion leaders through e-mails, seminars, exhibitions, fairs, promotional events, as the means to influence them to promote a brand" (Saha, 2013) will have to be built, spread and be aligned within the GPHL sales and fitting network. Even though, lubricant is seen as belonging to a low involvement product category, whereas bikes and two-wheelers are high involvement ones, two-wheeler helmets tends to match with a medium to high involvement category, as their buying, and brand picking, will often be associated with the purchase of brand new two-wheelers, and/or coming along the repurchase of gears, as a replacement and/or expansion purchase to include other drivers/passengers. Price sensitivity may be high, as the largest share of the budget will be spent on the motorcycles, and saving will then be put on accessories such as helmets, or third party liability insurance coverage, with dire consequences[77], with "*not more than 10% of helmet buyers are willing to spend more than Rs 1.000 on a helmet*[78]".

That is where setting up the proper distribution presence in India, as previously detailed, could help build a unique market offering, with "*on the production side either OEM and/or local "fitters", and on the distribution channels both franchisees and third party logistics*". Combining product accessibility, cost containment, feature attractiveness and added services and values to the consumers. Indeed, offering (size) fittings, (sound gear) adjusting, and/or personalization (e.g. painting, finishing) at dealer and (work)shop levels, at time of purchase, and retrofitting, upgrading and swapping services (at a later stage), could bring valued proximity and comfort to consumers, sensibly increasing their fidelity, closeness to the network and repurchase rates.

For younger consumers (whether urban or rural), several mobile platforms, and proper online advertising (mobile advertising), shall help ensure enhanced customers' experience, with online pre-orderings possibilities, matching with consumers' selection criteria (e.g. quality certificates, choice of style, main colors, sizes, options), quick manufacturing (OEM), rapid and local deliveries, as in piggybacking on Flipkart's e-kart offering of "*back-end support to other e-retailers*". Financial agreement, and the implementation of schemes to make the GPHL products and services more accessible, granting buying on installment and Cash

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[77] "*People don't buy quality helmets because the price ranges between Rs 1,000 and Rs 2,000*" and is often perceived as too expensive. Retrieved January 28th, 2015, from http://timesofindia.indiatimes.com/india/85-helmets-used-by-riders-unsafe-Manufacturers/articleshow/12540580.cms

[78] Retrieved, January 26th, 2015, from http://timesofindia.indiatimes.com/city/pune/Make-helmets-cheaper-for-better-compliance-Experts/articleshow/45926985.cms

on Delivery (COD) will have to be worked out as well, as per the "major" significance it does have for consumers (convenience) on the one side and retailers (reliability) on the other.

Pricing schemes

Even though assessing production, distribution and selling costs of the GPHL line is highly difficult at this stage, relying on a more thorough and complex analysis of the market's pricing levels and competitiveness, **Appendix F** gathers some of the relevant price indications and data, for a first assessment of the Indian two-wheeler helmets market. Indeed our market prices will be dependent on many market conditions (cost structures), yet shall match with the usually witnessed price levels, to be gathered on the online and offline market.

A first assessment of the GPHL price positioning, could see it promoted between Rs 800 and Rs 1.400 so to match with a medium-high positioning, knowing that the GPHL concept's main idea should work better. With ad-hoc product subsides. Indeed, encapsulating it in a series of promotional campaigns, such as new product launches, ("safe and sound") awareness campaigns (local, national), or "end of school/just graduated" offers aimed at students, could boost its appeal in specific periods of time, in specific markets and with appropriate incentives. Collaboration with main third party liability insurers and/or two-wheeler manufacturers, bringing "combined" offer (e.g. two-wheeler + insurance + helmet for a bulk price), set of vouchers (e.g. from the insurance or the two-wheeler companies), (State) incentives, or a private labelling/co-branding setup (e.g. radio stations, mobile makers, two-wheeler, insurance or any other brand) to the GPHL line could help lower its overall street price, for a fair period of time, while increasing its market visibility, consumer attractiveness and affecting its sales volumes. The selling cost of a helmet representing about two percent of a tow-wheeler's tag price, one to two years' worth of third party liability insurance fee (or a 50% discount on a three years contact), as well as about ten percent of a mid-level smartphone price.

Nowadays, and to complete the above mentioned scheme, India's rising middle class (and those who aspire to move up into that group), willing to share the Indian dream, to prosper individually and as a family, across the economic spectrum are seeing brands "*responding with schemes to make their products and services more accessible. Buying on installment is available both for inexpensive products and luxury cars*[79]". Ensuring the roll-out of such a payment scheme at shops' level, or the previously mentioned COD, through a collaborative agreement with a/several national/local bank/s, for instance, shall help converge proper incentive and efficient scheme, for the benefit of (last leg) sales clerks and mechanics, in phase with customer and manufacturer requirements.

[79] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p22. Retrieved January 15th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

Adding value (through servicing, fitting, retrofitting, m-shopping, product customization, hybrid models leveraging online and offline presence, to name just a few add-on), shall ensure that the perceived, and effective, value offer (value for money) the GPHL line will provide Indian customers with, should met their highly demanding functional requirements. It is true that, and as mentioned by Watanabe el al (2014) "*merely cheap will not lead to product sales, consumers are very demanding when evaluating value such as functions*", yet while price is an important factor for purchase, "*delivery on service parameters such as on time delivery, delivery of right products, etc. is also important for e-tailers. A growing sensitivity towards the service aspects is visible from the nature of issues cited by the consumers"*[80]. Teaming up with Flipkart, local OEM and fitters, shall help ensure that the issue is well taken into consideration.

Conclusion:

Assessing how to penetrate the "Incredible Indias" market takes quite a bit of data gathering and multilayered analysis, to allow for its first level of understanding. While its macro and meta data show a market dynamism rarely witnessed in the Western world (in recent years). A closer analysis of its consumer population (micro) shows however more complex, multi-dimensional, consuming mindsets to master. Blurred borders between rural and urban, traditionalism and modernism, national, regional and local habits, cultures, vindications, expectations and opportunisms render the task of building such a marketing plan, a relatively demanding challenge.

To summarize, I am tough also a firm believer that "i*n India, if you can create a product or service, you can find a market for it"*. While highly challenging, having to face such a contradictory fast (yet slow) moving market, doing Marketing in India does represent a unique opportunity to rethink how to build a "glocal" (country specific) marketing plan. "Indeed, f*or international brands, it's useful to think of India as Europe, a large geography with states that are both unified and distinctive*[81]".

Accordingly, experiences taken from both the Western and Indian world(s) need not only being mixed in a unique incredible concoction, they will have to draw a new line between what can be can be brought to India and what can India(s) teach you.

[80] KPMG Retail leadership summit 2014, p22, Executive Summary. Retrieved January 17th, 2015, from http://www.kpmg.com/IN/en/industry/Documents/RAI-Retail-14.pdf
[81] Millward Brown, "Brandz™ TOP 50 Most Valuable Indian Brands 2014", p24. Retrieved January 15th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf

Appendix A: Key specific data about India - anno 2015

<table>
<tr><td rowspan="8">Demographic & socio - economic characteristics[82]</td><td>Population</td><td>1 028 737 436 Persons, Males (51.73%) and Females (48.27%)</td></tr>
<tr><td>Administrative Divisions</td><td>28 States, 7 Union Territories, 593 Districts, 5.463 Sub-districts</td></tr>
<tr><td>Rural-Urban Distribution</td><td>Rural (72.18%) and Urban (27.82%)</td></tr>
<tr><td>Religious Composition</td><td>Hindus (80.5%), Muslims (13.4%), Christians (2.3%), Sikhs (1.9%), Buddhists (0.8%), Jains (0.4%), Other Religions & Persuasions (0.6%)</td></tr>
<tr><td>Literacy Rate</td><td>Total: Persons (64.8%), Males (75.3%) and Females (53.7%)
Rural: Persons (58.7%), Males (70.7%) and Females (46.1%)
Urban: Persons (79.9%), Males (86.3%) and Females (72.9%)</td></tr>
<tr><td>Broad Age Groups</td><td>6 years and below (15.9%), 7 to 14 years (19.4%), 15 to 59 years (56.9%), 60 years and above (7.5%), Age Not Stated (0.3%)</td></tr>
<tr><td>Median age</td><td>27 years (Brazil 30.7, China 36.7, USA 37.6, Russia 38.7, UK 40.4)[83]</td></tr>
<tr><td>Languages[84]</td><td>29 individual languages with >1 million native speakers (2001 census)
Top 10: Hindi (41.03%), Bengali (8.11%), Telugu (7.19%), Marathi (6.99%), Tamil (5.91%), Urdu (5.01%), Gujarati (4.48%), Kannada (3.69%), Malayalam (3.21%) and Oriya (3.21%) = 88.83% of India’s population</td></tr>
<tr><td rowspan="8">Macro economics</td><td>Annualized Macro Data[85] (2010-2014)</td><td>GDP growth (5.0%), GDP per capita (Rs 90.685), Inflation consumer prices (10.9%)</td></tr>
<tr><td>Income Pyramid[86] (estimation 2014)

Rs 1 Lakh = €1.428[87]</td><td>High Income Level (>Rs 12 Lakhs): 8.3 Million households
Middle High (Rs 6-12 Lakhs): 11.4 Million households
Middle Low (Rs 2.4-6 Lakhs): 35.4 Million households
Low (Rs <2.4 Lakhs): 181.3 Million households</td></tr>
<tr><td>Disposable net salary[88]</td><td>$ 452.11 (Rs 27.893), monthly (average). Rank: 142/176</td></tr>
<tr><td>(New SEC System) Households Distribution %</td><td><table><tr><td>A1</td><td>A2</td><td>A3</td><td>B1</td><td>B2</td><td>C1</td><td>C2</td><td>D1</td><td>D2</td><td>E1</td><td>E2</td><td>E3</td></tr><tr><td>0.4</td><td>1.8</td><td>3.2</td><td>4.3</td><td>5.3</td><td>7.5</td><td>7.9</td><td>11.4</td><td>14.7</td><td>18.4</td><td>15.4</td><td>9.7</td></tr></table></td></tr>
<tr><td>HRA classification[89]</td><td>X (Tier 1); 6 cities, Y (Tier 2); 68 cities, Z (Tier 3); all other cities</td></tr>
<tr><td>Doing Business ranking[90]</td><td>Ease of Doing Business: 142/189, Starting a Business: 158/189, Enforcing Contracts: 186/189, Trading Across Borders: 126/189</td></tr>
<tr><td>WTO[91]</td><td>Member of the World Trade Organization since 1 January 1995</td></tr>
<tr><td>Free Trade Agreement[92]</td><td>Trade preferences with the EU (Generalized Scheme of Preferences)
Ongoing negotiations for a comprehensive FTA (started June 2007)</td></tr>
</table>

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82 Retrieved February 02nd, 2015, from http://www.censusindia.gov.in/Census_Data_2001/India_at_glance/glance.aspx
83 Millward Brown, “Brandz™ TOP 50 Most Valuable Indian Brands 2014”, p9, p58, 29, 198. Retrieved January 27th, 2015, from http://www.millwardbrown.com/BrandZ/2014/India/Docs/BrandZ_2014_India_Top50_Report.pdf
84 Retrieved February 02nd, 2015, from http://www.mapsofindia.com/culture/indian-languages.html
85 Retrieved February 02nd, 2015, from http://data.worldbank.org/indicator/FP.CPI.TOTL.ZG
86 Retrieved January 21st, 2015, from http://www.tsmg.com/download/article/Deciphering%20India%27s%20Demographic%20Puzzle.pdf
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90 Retrieved January 31st, 2015, from http://www.doingbusiness.org/rankings
91 Retrieved January 31st, 2015, from http://www.wto.org/english/thewto_e/countries_e/india_e.htm
92 Retrieved January 31st, 2015, from http://ec.europa.eu/trade/policy/countries-and-regions/countries/india/

Appendix B: Key dynamics about the Indian two-wheeler market - anno 2015

<table>
<tr><td rowspan="8">Industry profile: motorcycles in India[93]</td><td>India’s two-wheeler weight in the world[94]</td><td>Third largest two-wheeler manufacturer
Second largest consumer of two wheelers
25.2% of the Asia-Pacific motorcycles market value</td></tr>
<tr><td>Domestic makers</td><td>Two Wheelers = 80% Market Share (2013-14)</td></tr>
<tr><td>Two wheelers Sales Trends</td><td>
<table>
<tr><td>2008-2009</td><td>2009-2010</td><td>2010-2011</td><td>2011-2012</td><td>2012-2013</td><td>2013-2014</td></tr>
<tr><td>7 437 619</td><td>9 370 951</td><td>11 768 910</td><td>13 409 150</td><td>13 797 185</td><td>14 805 481</td></tr>
<tr><td>growth</td><td>26%</td><td>26%</td><td>14%</td><td>3%</td><td>7%</td></tr>
</table>
21.1 million units expected to be sold in 2016[95]
27 million units expected by 2020[96]</td></tr>
<tr><td>Trends</td><td>19% discretionary spending on transportation in 2015[97]</td></tr>
<tr><td>Market value</td><td>$7.7 billion (2013), + 1.6% (vs 2012)
Forecast (2018) value of $11.1 billion, + 43.9% since 2013</td></tr>
<tr><td>Segments (volume)</td><td>Motorcycles (73.3%), Mopeds (26.7%)</td></tr>
<tr><td>Top three players</td><td>Hero, Honda, Bajaj (79.6% of the market share by volume)[98]</td></tr>
</table>

[93] Retrieved January 21st, 2015, from http://www.siamindia.com/scripts/domestic-sales-trend.aspx
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[97] Retrieved January 28th, 2015, from http://www.mckinsey.com/insights/asia-pacific/the_bird_of_gold
[98] Retrieved January 21st, 2015, from http://store.marketline.com/Product/india_motorcycles?productid=MLIP1220-0010

Appendix C: Incidence of helmet wearing on road casualties

Road safety related issues	Motor Vehicle Act of 1988[99]	Section 129: “*A person driving a motor cycle shall wear helmet*“ Before it, a study found 0.6% of all MTW pillions were helmeted Citing religious protests to the legislation, Delhi's high court exempted the city's 12 million women from the law[100]
	Accidental deaths 2013[101]	34.3% of overall accidental deaths, whereas 34.187 people (24.9%) where on two-wheelers
	Daily toll[102] (2013)	377 deaths and 1.287 injuries per day due to road accidents, 94 deaths by two-wheeler a day Motorized two-wheeler (MTW) road traffic accidents injure or kill 72.000 women annually
	Observational study[103] (2012)	22.6% of motorcycle drivers and 1.1% pillion riders were found wearing helmets In roadside interview, 64.6% of the respondents reported to “always use helmet”, much higher than observed rate of 29.3% in same group
		Reasons for not always using helmets: it included not having one (27.4%), depending on where they drive (25.1%) and forgetting it sometimes (23.7%)
		Reason for always using helmets: It can save my life’ (99.2%)
	Road Safety[104]	Most common cause of death is head injury Advantages of helmet: decrease likely hood of death (39%), risk & severity of injury (72%), cost of Health Care (25.000 Crore a year)

[99] Retrieved February 02nd, 2015, from http://www.morth.nic.in/index2.asp?slid=95&sublinkid=54&lang=1
[100] Retrieved February 1st, 2015, p5, p13, from http://www.ncbi.nlm.nih.gov/pubmed/24529884
[101] Retrieved February 1st, 2015, p5, p13, from http://ncrb.gov.in/adsi2013/accidental%20deaths%202013.pdf
[102] “*Accidental Death and Suicide Clock, 2013*”. Retrieved February 1st, 2015, p5, p13, from http://ncrb.gov.in/adsi2013/clock.pdf
[103] Retrieved February 02nd, 2015, from http://injuryprevention.bmj.com/content/18/Suppl_1/A197.2.full.pdf+html?sid=29742847-413a-4a60-a50c-6c6ddfca236d
[104] Dr. B.B. Banga, Chairman, Road Safety, Lions Clubs International District 321-A3. Retrieved February 02nd, 2015, from http://www.authorstream.com/Presentation/drbanga-320491-helmet-education-ppt-powerpoint/%20July%202009

Appendix D: Extended road safety mandatory measures

Insurance coverage rates	Mandatory third-party liability insurance[105]	Nearly 70% two-wheelers and around 35% of four wheelers on Indian roads do not have even the mandatory third-party liability insurance Vehicle owners in semi-urban and rural areas do not face any scrutiny of their documents. Hence they prefer not to buy insurance cover for their vehicles
	National Road Safety Week[106]	The initiative aims at bringing about a behavioral change in drivers, both two and four wheelers and sensitize them to recognize the rights of the pedestrians who are the primary victims of road accidents
	Extended insurance cover[107]	The Insurance Regulatory & Development Authority (IRDA) allowed general insurance companies to provide third party motor cover for two-wheeler for 3 years instead of current practice of annual renewal

[105] Retrieved February 1st, 2015, from http://www.indiainfoline.com/article/news-corporate/two-thirds-of-vehicles-do-not-have-insurance-study-113110709820_1.html

[106] Retrieved February 1st, 2015, from http://www.nsc.org.in/index.php?option=com_content&view=article&id=77&Itemid=67

[107] Updated: August 12, 2014 22:32 IST. Retrieved February 1st, 2015, from http://www.thehindu.com/business/Industry/threeyear-third-party-insurance-cover-for-twowheelers-also/article6309555.ece

Appendix E: Size and importance of Mass Media in India

India's media landscape	traditional media	All India Radio	350 languages to be picked among
		private FM Radio	242 Radio Station
		newspapers[108]	4.500 national, regional & local titles
		private television	748 Permitted Private satellite television
		public television	30 Government channels[109]
		Out of Home	Billboards in "epidemic proportions"[110]
	online media	active Internet users	302 millions Internet users (est. 2015[113])
		urban/rural split	Urban = 177 mn, rural = 101mn[114]
		smartphones shipped	125-140 mns (est. 2015[115])
		smart devices spread	81% (Mobile Phone), 10% (Smartphone), 9% (Multimedia Phone), 3% (Tablets)[116]
		active mobile pool	762 mns active connections, 405 mns subscribers
		average daily use[111]	smart devices (90 mns) & PC (64 mns)
		mobile internet	60% access internet via mobile[117]
		purchase intent on mobile	21% car, motorcycles and accessories[118]
		social networking use	86% Indian users visit social networking sites [119]
		Most popular social sites (million subscribers[112])	Facebook (112 on PCs, 99 on mobile), LinkedIn (30), Twitter (35)

[108] Retrieved Dr. Kokil Jain, Session 3&4, "Cultural diversity", Slide #8, #18, November 12th, 2014
[109] Retrieved, January 12th, 2015, from http://en.wikipedia.org/wiki/List_of_television_stations_in_India
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[111] Retrieved Dr. Kokil Jain, Session 5, "Cultural diversity", Slide #8, #7, November 12th, 2014
[112] Retrieved, January 12th, 2015, p31, from http://thedmti.com/images/India_on_Internet_2015.pdf
[113] Retrieved, January 12th, 2015, p2, from http://thedmti.com/images/India_on_Internet_2015.pdf
[114] Retrieved, January 12th, 2015, p10, from http://thedmti.com/images/India_on_Internet_2015.pdf
[115] Retrieved, January 12th, 2015, p24, from http://thedmti.com/images/India_on_Internet_2015.pdf
[116] Retrieved, January 12th, 2015, p24, from http://www.nielsen.com/content/dam/corporate/uk/en/documents/Mobile-Consumer-Report-2013.pdf
[117] Retrieved, January 12th, 2015, p23, from http://thedmti.com/images/India_on_Internet_2015.pdf
[118] Retrieved Dr. Kokil Jain, Session 5, "Cultural diversity", Slide #12, November 12th, 2014
[119] Retrieved, January 16th, 2015, from http://thedmti.com/images/India_on_Internet_2015.pdf

Appendix F: Relevant price indications on two-wheelers market in India

India Two-wheelers (and related) pricing indications	Two-wheeler[120]	Bajaj AutoBSE[121] Honda Activa Piaggio Vespa LX 125[122] Hero Pleasure Mahindra Rodeo RZ Mahindra Duro DZ Yamaha Ray TVS Wego	Discover 125 (Drum Version), priced at Rs 49.075 Rs 47,204 (ex-showroom, New Delhi) Rs. 68,272 (ex-showroom, New Delhi) Rs 41,700 (ex-showroom Delhi) Rs 48,164 (ex-showroom Delhi) Rs 46,150 (ex-showroom New Delhi) Rs 46,500 (ex-showroom New Delhi) Rs 43,445 (ex-showroom New Delhi)
	Helmet[123]	ISI-marked helmets ISI-licensed helmet Made-in-China helmets Consumers	Cost Rs 800-Rs 13.000 105 ISI-licensed helmet manufacturers Cost not more than Rs 500 (lack ISI certification) Not more than 10% of helmet buyers are willing to spend more than Rs 1000 on a helmet
	Insurance	Motor third party premium rate[124]	Not exceeding 75 CC: Rs 455 Between 75 CC & 150 CC: Rs 464 Between 150 CC & 350 CC: Rs 462 Exceeding 350 CC: Rs 884
	Affordable smartphones	mid-level	Below Rs 12.000

120 *Top 7: Scooters setting Indian roads on fire*. Retrieved, February 06th, 2015, from http://www.rediff.com/getahead/slide-show/slide-show-1-biking-and-motoring-top-7-scooters-setting-indian-roads-on-fire/20130806.htm#1
121 Retrieved, February 06th, 2015, p24, from http://www.iupindia.in/1411/Marketing%20Management/An_Analysis_of_the_Factors.html
122 Retrieved, February 06th, 2015, from http://www.bikewale.com/vespa-bikes/
123 Retrieved, January 26th, 2015, from http://timesofindia.indiatimes.com/city/pune/Make-helmets-cheaper-for-better-compliance-Experts/articleshow/45926985.cms
124 Retrieved, January 16th, 2015, from http://www.policyholder.gov.in/uploads/CEDocuments/Increase%20in%20Motor%20TP%20Premium%20Rates-1.pdf

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