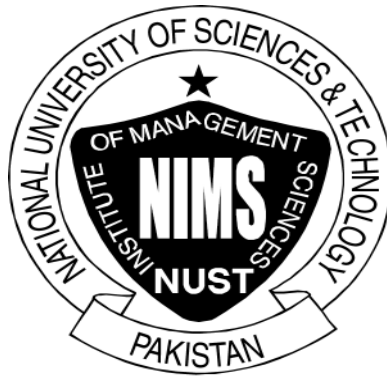


# **EVALUATING JOHN PLAYER GOLD LEAF AS BRAND**



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## *Executive Summary*

Branding has been around for centuries as means to distinguish the goods of one producer from those of another. Branding is not marketing. Rather it is an integral part of your marketing strategy.

The reason I have chosen this topic is that Brand Management is a new concept in Pakistan. It has been introduced by NMCs few years ago and I find it interesting because not lot of work has been done on this topic, so one can dig out lot of interesting things about local brands. I limit my study because it is not possible to cover all aspects of branding, and trying to focus on the particular but important aspect of branding that is brand equity. It is one of the most popular and potentially important marketing concepts arose in the 1980s. Brand equity occurs when the consumers have a high level of awareness and familiarity with the brand and holds some strong, favorable, and unique brand associations in the memory. Consistency is the key to successfully building and managing brand equity.

The other reason I have chosen John Player Gold leaf (JPGL) as a brand for my thesis is that it is Flagship brand of Pakistan Tobacco Company. JPGL is a longstanding single largest brand in the medium segment in the Pakistan, despite being the second most costly mainstream brand in Pakistan (after B&H), JPGL enjoys an 7% market share which is good because almost 80% of the market belongs to low category brands (due to consumers affordability issue). In the Pakistan its success is attributed to consumer perceptions of JPGL being a truly international offer that is produced locally.

The main focus of the thesis is on the different aspects in general and inputs of JPGL's Equity in particular. All this has been done through reviewing the study conducted by PTC for the JPGL. The main areas of equity which has been covered are: Brand standing, Brand loyalty, Perceived Product Quality,

Price Value Evaluation, Packaging Evaluation, Evaluation of Advertising, Physical and Emotional Identity of the Brand, Core Equity, and identify the values which are under threat and need to be strengthened and new values that need to be inducted in order to enhance the competitive edge of JPGL. The study also includes the relationship and contribution of JPGL Lights to JPGL Equity.

JPGL emerges with a strong, well-defined and cohesive equity in Pakistan. The strong brand standing and the powerful loyalty that it commands is on account of its perceived offer of a consistent, premium quality cigarette. Its offer of status and prestige, in addition to the above make it a part of an international brands set. It evokes nationalistic pride and is viewed as a flagship brand in the country.

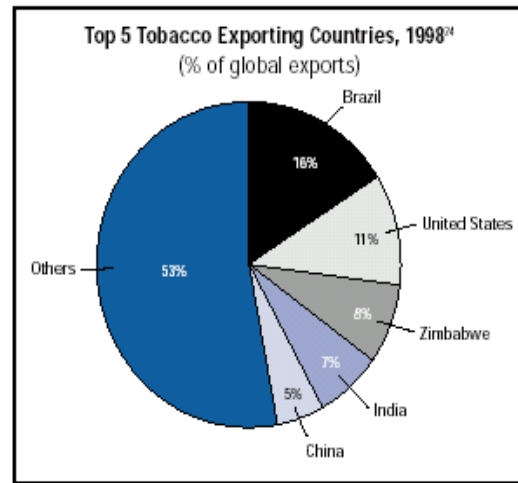
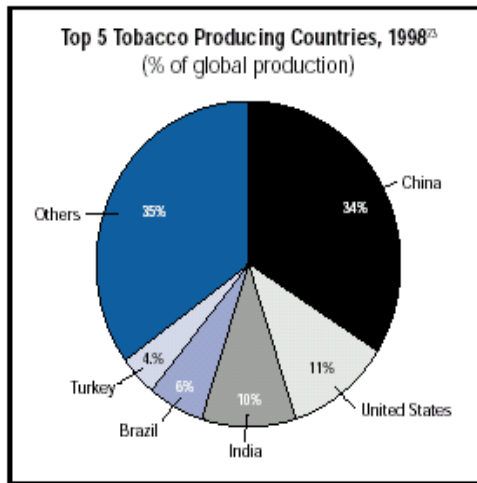
## *Chapter 1*

# **INTRODUCTION**

## **1.1 WORLD TOBACCO INDUSTRY**

Globally, 5.3 trillion cigarettes were consumed in 1997. There are currently 1.1 billion smokers in the world today. If current trends continue, this number will increase to 1.6 billion by 2025. Approximately 25% of women in industrialized countries smoke, while about 7% of women in developing countries smoke.

Philip Morris, Japan Tobacco and British American Tobacco, the world's three largest multinational cigarette companies, now each own or lease plants in at least 40 countries. In 1998, they had combined tobacco revenues of more than \$88 billion, a sum greater than the total gross national product (GNP) of Albania, Armenia, Bahrain, Bolivia, Botswana, Bulgaria, Cambodia, Cameroon, Estonia, Guyana, Honduras, Jamaica, Jordan, Laos, Latvia, Madagascar, Moldova, Mongolia, Nepal, Nicaragua and Togo combined. Between 1989 and 1999, Philip Morris' international tobacco revenues increased 226% to \$27.4 billion, while profits from those sales rose 400% to \$5.05 billion. During the same period in the United States, the company's tobacco revenues increased 107% to \$19.6 billion while profits increased by 40% to \$5.05 billion. In 1999, British American Tobacco had international tobacco revenues of \$17.61 billion, with profits of \$3.18 billion. In 1999, Japan Tobacco had tobacco revenues of \$37.9 billion, with profits of \$1.7 billion.



### 1.1.1 BRITISH AMERICAN TOBACCO

British American Tobacco ranks among the **world's leading** global consumer goods companies and has been a driving force in the tobacco industry for close to a century. The Group currently sells over 800 billion cigarettes annually, with a 15.4 per cent share of the world market. It has active business in 180 countries worldwide. Total brand portfolio now comprises of over **320 brands**, and a market leader in more than 50 markets. British American Tobacco is an industry-leader in tobacco leaf production and development. BAT has 25 leaf operations in some 24 countries. The group is the only tobacco company extensively involved with leaf growing, and is also one of the world's largest leaf exporters. The group operates leaf-growing programmes around the world, providing support to some 250,000 independent farmers.

The company has manufacturing operations in 66 different countries, consisting of 85 cigarette factories producing approximately 777 billion cigarettes each year and processing some 660 million kilos of leaf in 26 leaf processing plants. In total these facilities provides permanent jobs to approximately 85,000 employees. Most factories are equipped with state-of-



the-art cigarette making and packing machinery capable of automated production at a rate of up to 15,000 cigarettes per minute and 750 packs per minute on a single machine complex.

The strategic drivers for manufacturing are to fully meet demand by delivering the required quality at the lowest overall supply chain cost. This is achieved through setting-up world-class standards and best practices in terms of product quality, cost and availability and to continuously improve upon their attainment throughout our manufacturing organisation.

### **1.1.2 PHILIP MORRIS**

This is **world's largest tobacco** company. The history of what is now a global company can be traced back to Philip Morris's 1854 opening of a single shop on London's Bond Street, selling tobacco and ready-made cigarettes.

With its position in the United States firmly established, Philip Morris Incorporated decided to market its products around the world. In 1954 it set up Philip Morris (Australia) Ltd. and followed it the year after with Philip Morris Overseas - an international division that, in 1961, was to become **Philip Morris International**: Currently holds a **14% share** of the international cigarette market, employ some 40,000 people worldwide and have an interest in, operate or own more than 50 factories. Our affiliates manufacture, market, sell and/or distribute quality cigarettes in over 160 countries around the world. Between 1981 and 2001 production volumes grew from 249 billion cigarettes to almost 700 billion. Operating income grew proportionately.

### **1.1.3 JAPAN TOBACCO**

**JT** is the **world's third largest** international tobacco company, producing 8.1% of the world's cigarettes, and manufacturing three of the world's top five cigarette brands - Camel, Mild Seven and Winston - and one of the world's leading menthol brands, Salem.

JT sold almost 453.5 billion cigarettes in 2002. There are 29,860 employees in the tobacco business within the JT group.

**JT International (JTI)** is an operating division of Japan Tobacco Inc. (JT), handling the international production, marketing and sales of the group's cigarette brands. JT International is based in Switzerland and has business in more than 120 countries around the globe. Established in 1999, JTI has 11,000 employees worldwide and is an operating division of the JT Group.

### **1.1.4 IMPERIAL TOBACCO GROUP**

**Imperial Tobacco Group** is the **world's fourth largest** tobacco company. Its cigarette portfolio includes Lambert & Butler, Regal, Superkings, Embassy, West, Davidoff, R1, Excellence and Horizon. Brands range from Drum, Van Nelle and Golden Virginia, in roll-your-own tobacco, to Rizla, in rolling papers.

In 1901 The Imperial Tobacco Company (of Great Britain and Ireland) Ltd. was formed through a merger of a dozen British tobacco companies. However, the Company can trace its roots further back, to 1786 when Henry Overton Wills opened a store in Bristol, and a year later when a merchant John Player bought a small tobacco business in Nottingham.

## **1.2 TOBACCO INDUSTRY OF PAKISTAN**

The tobacco industry of Pakistan makes a significant contribution to all sectors of the economy, from farming through manufacturing to retailing. The industry is also a major purchaser of supplies from other industries. Tobacco is the only crop grown in Pakistan whose yield is well above the world average and ranks along side the US and other developed countries in terms of yield per hectare. The industry employs over 1 million people (Distribution & Retailing 32%, Growing 33%, and Manufacturing 35%).

The industry is the single largest contributor to excise duty. It generates 6 times more excise duty than cotton yarn and adds **Rs 15.17 billion (1997)** to tax revenue. Taxation raised from tobacco industry's activities is nearly enough to finance the country's federal budget on social and community services. Manufactured cigarettes are high value added products and 60 % of retail price is accounted for by tax. By world standards, Pakistan applies a very high tax regime. It is estimated that the government loses approximately **Rs 2.8 billion** every year due to tax evasion and smuggling. Taxation raised from tobacco industry's activities is nearly enough to finance the country's federal budget on social and community services. The industry contributes to **GDP Rs 27.5 billion (4.4% of the total GDP of Pakistan)**. Pakistan's total cigarettes market is estimated at 66 billion sticks including 50 billion sticks produced by the legitimate sector.

### **1.2.1 LAKSON TOBACCO COMPANY**

Lakson Tobacco Company was incorporated in Pakistan on February 10, 1969 as a public limited company and its shares are quoted on the Karachi and Lahore stock exchanges. Philip Morris International (PMI) has a 30% share in Lakson Tobacco Company (LTC). The principal activity of the

company is the manufacture and sale of cigarettes and tobacco. The company has presently five manufacturing plants located at Kotri (Sindh), Korangi (Karachi), Qadirabad (Sahiwal), Mandra (Rawalpindi) and Swabi (N.W.F.P.). Lakson Tobacco Company uses a Contractual Vertical Marketing Strategy. This strategy consists of independent firms at different levels of production and distribution who join together through contract to obtain economies of scale. LTC has a very strong financial base. The company has no financial constraints on its Research & development. The Company's R&D department continuously strives to improve the quality of products. The company's personnel department offers incentives to the sales people by offering them more bonuses on performance. The company has a very strongly knitted network of marketing intermediaries. They have 580 distributors countrywide and the physical distribution is very efficient. The company has a good supply line of raw materials. It acquires raw material both locally and also imports them from other countries. According to the prestigious Advertising Age magazine, LTC was the third largest advertiser in Pakistan in 1998, spending an astounding Rs328 million (US\$6.42 million).

Lakson Tobacco Company will seek to consolidate its position in the face of challenges and current difficult economic situation and will strive to further improve its quality, volume and profitability. Effective cost control measures will be continued, with increasing emphasis and expansion of distribution coverage will receive continued focus in the ensuing year.

#### **BRANDS PROFILE**

##### **□ DUNHILL (High)**

Dunhill is a major premium brand of LTC targeted towards the high-income target market. Its high price considered as a direct competitor to Benson & Hedges by PTC. The cigarette has high quality tobacco and is

targeted toward well-established, successful consumers who have a certain standard and life-style.

□ **PREMIER CLASSIC (Medium)**

Lakson Tobacco Company is manufacturing Premier Classic under license from Premier Classic International in Pakistan this year on the 13 November 1999. Presently it is only being manufactured at Kotri. Premier Classic is best suited for achievers and experiencers, who want to try new things in life. Most of the Young Executives and businessmen are likely to use the brand because most of the blue-collar workers may not be economically able to buy the cigarette. The price of Premier Classic is adjusted according to economic situation of Pakistan. Due to shift in our cultural values and beliefs and shift towards western side, they create an image of "Premier Classic" for high social class. The best benefit of Premier Classic is its good taste, high quality and medium price.

□ **K-2**

K-2, like embassy of PTC is targeted at the market that has low income and that prefers the strong taste. People mostly from villages and those who fall into the lower income bracket have a high demand for K-2.

□ **RED & WHITE**

Red & White is also an important brand for LTC. It is placed, in terms of price, between PTC's Wills and Capstan. It is a medium brand in terms of price and enjoys a good market share and brand loyalty. The quality of Red & White is also good and delivers taste and satisfaction to its users.

## **1.2.2 PAKISTAN TOBACCO COMPANY**

**Pakistan Tobacco Company** is a member of **British American Tobacco** group (BAT). BAT employs over 100,000 people, operating in from over 60

countries. PTC is the first **Multination Company** in Pakistan established in 1947, took over business from **Imperial Tobacco Company**, operational since 1929 in the sub-continent. Manufacturing operations commenced in 1948 when Karachi factory was established. Another full-fledged factory established in 1955 at Jhelum. To meet the increased demand, a new factory was setup in Akora khattak in 1976. Karachi factory closed in 1991 due to economic considerations. Due to operational benefits, head office shifted to Islamabad in 1994.

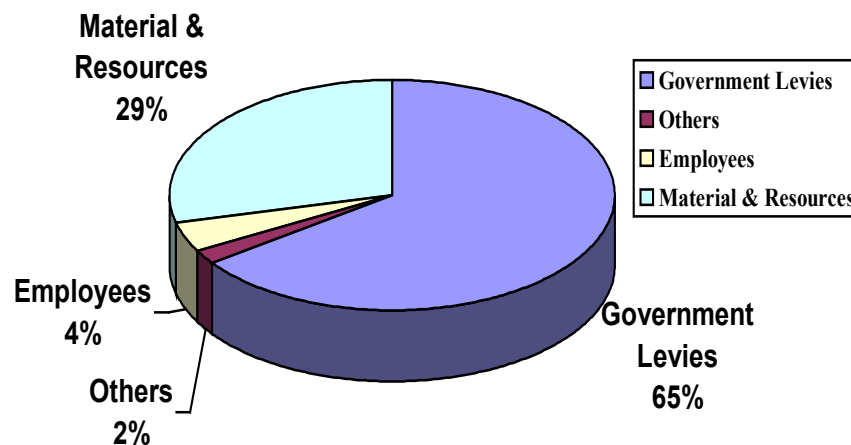
PTC is the largest revenue generator in the country, paying more taxes than the entire textile sector, which is the largest industrial sector in the country. In 2000 alone, PTC paid the government over **Rs 10 billion** in taxes. This amounts to over **3 crores per working day**. Over 100,000 people, including growers and direct employees are dependent on their livelihood to the Company. This does not account for the many other indirect sources of employment we provide to the packaging, publishing and media houses. PTC has been a leader in innovative marketing campaigns, which brought a whole new competitive edge to Pakistan's business world.

PTC has been a leader in innovative marketing campaigns, which brought a whole new competitive edge to Pakistan's business world. PTC is the largest revenue generator in the country, paying more taxes than the entire textile sector, which is the largest industrial sector in the country.

PTC has also been a forerunner in establishing scientific methods of research to focus on the changing consumer needs. It was the first company to introduce filter cigarettes in 1955. PTC is always mindful that it is in a business of serving customers & consumers; therefore it continuously seeks to improve products and services to deliver world-class quality standards. Fulfilling its social obligations & based on the principle of **"Resource re-**

**cycling & Environmental Protection"** PTC has undertaken the huge task of establishing a solid waste re-cycling plant aimed at management of

### Distribution of Revenue



municipal solid waste at Jhelum cantonment. This plant will provide pollution free environment to the community, and will help increase employment opportunities in the area. Elimination of burning of waste will help reduce global warming and pollution. Pakistan Tobacco Company is the first Company within Pakistan, which is well connected through a state of the art online system with all its locations across the country. Information Technology is at the core of our business strategy and is a benchmark among other Fast Moving Consumer Goods (FMCG) companies in the country. **PTC's Vision** is to become the preferred choice for everyone and achieve recognized market leadership through sustainable world-class performance in all aspects of the business.

- **Total Cig. Market/Annum**                      **60 Billion**
- **PTC Capacity**                                      **27 Billion**
- **PTC Market Share**                                **45.6 %**
- **PTC Value Share**                                 **52 %**



#### **Distribution Network:**

- ❑ **Regions:**                   **05**
- ❑ **Areas:**                       **19**
- ❑ **Warehouses:**           **12**
- ❑ **Distributors:**           **370**

#### **BRANDS PROFILE**

PTC has reputation for manufacturing high quality cigarette brands, which are enjoyed by millions of adult smokers. The portfolio of brands includes a range of brands for different consumer preferences. Over the years the company has produced brands which have reached a classic status and meeting consumer expectations consistently for the past 56 years with such popular international brands like **Benson & Hedges, John Players Gold Leaf, Wills, Gold Flake, Capstan & Embassy.**



#### □ **BENSON & HEDGES**

A premier brand with premium image gives feeling of “impassioned spirit”. Benson & Hedges continues to be the number one choice among international brands. Imported Benson & Hedges was launched in 1996. The purpose of launching imported Benson & Hedges was that International Transit Brands (ITB) were being smuggled and were causing problems for locally manufactured cigarettes (Gold Leaf). So in order to curb smuggling of ITB’s, imported Benson & Hedges was launched. Now research shows that the brand is the preferred choice among consumers looking for international quality and imagery. The theme of this brand is to get into a higher dimension. It is relaunched in 2003 and now also available in 10-cigarette pack.

#### □ **JOHN PLAYER GOLD LEAF**

John Player Gold Leaf continues to be the flagship for PTC. This brand dominates the high category and is widely acknowledged as number one mass cigarette brand of choice in the country, in terms of image appeal. This brand is firmly positioned as a top quality international offer with all the elements of PTC’s brand support underlying that positioning. PTC has worked closely with their suppliers to ensure that the materials they use are continuously improved to build further to the brand quality. The British American Tobacco Company limited owns John Player Gold Leaf.

#### □ **CAPSTAN**

It is a middle priced brand of PTC. The brand provides a higher value to its customers than Gold Flake. Over the past one year, it has grown by 104%. The company uses strategic pricing strategy to determine its cost

in the market. Its major threats are Read & White and Morven Gold. Theme for this brand is “travel/ free spirited”.

#### □ **GOLD FLAKE**

This brand targets the lower middle class and is popular in the areas around Lahore. Recently, the brand has repositioned its price from medium category to low category. This repositioning is followed by a volume growth of +700% in 2000 versus 1999. This brand now occupies now an important position in company’s portfolio addressing a strategically vital consumer franchise.

#### □ **EMBESSY FAMILY**

The target market for this brand is mostly the village people. Its following is because of the strong “huqqa“ taste. Its low price makes it suitable for the lower class. Embassy revealed its exceptional resilience in 2000 following price reductions by “Gold Flake” and “ Morven Gold” in the early part of the year. While many low category brands shed significant volumes, embassy not only maintained its volume but also grew by 3% in the second half versus the first half of 2000.

**Local companies** such as **Sarhad Cigarette Industries, Khyber Tobacco Company, Souvenir Tobacco Company Limited and Saleem Cigarette industries** hold the rest of the market. According to the Tobacco Statistical Bulletin 1994, there were 32 tobacco companies having 38 cigarette manufacturing factories with an installed capacity of over 87 billion sticks per annum. However, unofficial reports put the number of factories much higher. According to one report, 75 unlicensed factories are in operation in the tobacco-rich Mardan Division and Lalamusa alone, which are

manufacturing counterfeit major international brands and tax-evaded cigarettes. The Frontier province has 25 factories with installed annual capacity of more than 35 billion sticks. The nine factories in Sindh and four in Punjab have annual capacities of nearly 22 billion sticks and nearly 30 billion sticks respectively. (The network for consumer protection, tobacco free initiative).

## Chapter 2

# LITERATURE REVIEW

### 2.1 Brand

Branding has been around for centuries as means to distinguish the goods of one producer from those of another. In fact, the word “**brand**” is derived from the old Norse word “**Brandr**”, which means “to burn” as brand were and still are the means by which owners of livestock mark their animals to identify them.

According to American marketing Association, a brand is a “name, term, sign, symbol, or design, or combination of them intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition”. Thus, the key to creating a brand, according to this definition, is to choose a name, logo, symbol, package design, or other attributes that identifies a product and distinguishes it from others. Establishing a strong brand is essential to building and maintaining a robust customer base. Customers need to know why they should buy a product or service, what benefits they will derive from using it, and how it will enhance their businesses. The connections they make with the brand, whether perception or experience-based, strongly influence purchasing behavior—and impact the bottom line

**Branding** is process by which the true character and purpose of the company is communicated. And this process is a strategy that is consistently applied through the entire firm, hopefully creating an aura of trust; an appreciation of your uniqueness; and a set of expectations in your customers, shareholders

and employees. Branding is extremely critical in building a business, which leads to customer satisfaction and profits. Branding creates value beyond what's intrinsic in the product. Branding is a key defense against **commoditization** - a situation in which a company's products and services become perceived by buyers as being interchangeable with those of other companies, so buying decisions become driven by price. With the trend toward *instantly* and *globally* searchable competition across all product and service categories, the pull toward commoditization is now an elemental force in marketing. The value of branding - intelligent, relevant, branding that effectively differentiates you from your competition - has never been higher. Branding is also a way to leverage success, expand market share, and fend off competition. Indeed, companies with established brands often re-brand as a way to penetrate perceived new markets or defend core markets. This re-branding is often a costly mistake. Branding - or "brand-building" - has become the El Dorado of corporate marketing departments, advertising agencies, design firms, and consultants. However, branding goes beyond an attitude, or a logo, or a slogan, or an advertising campaign. Branding is a long-term holding in which your marketing communications are relatively short-term investments. Your brand is a tangible corporate asset - an end toward which all your business efforts should work.

Branding is not marketing. Rather it is an integral part of your marketing strategy. It's also an important part of how you interact with clients, prospects, vendors, employees, and anyone else with whom you come in contact. Branding creates an image.

## **2.2 HISTORY OF BRANDING**

Branding in one form or another has been around for centuries. The original motivation for branding was for craftsmen and other to identify the fruits of their labors so that customers could easily recognize them. Branding, or at least trademarks, can be traced back to ancient pottery and stonemason's marks, which were applied to handcrafted goods to identify their source. Pottery and clay lamps were some times sold far from the shops where they were made, and buyers looked for the stamps of reliable potters as guide to quality. Marks have been found early Chinese porcelain, on pottery jars from ancient Greece and Rome, and on goods from India dating back to 1300B.C. In medieval times, potters marks were joined by printers marks, watermarks on paper, bread marks, and the marks of various craft guilds. In some cases, these were used to attract buyers loyal to particular makers but the makers also used to police infringers of the guild monopolies and to single out the makers of inferior goods. Goldsmith and silversmiths were also required to mark their goods, both with their signature or personal symbols and with a sign of the quality of the metal.

When Europeans began to settle in North America, they brought the convention and practice of branding with them. The makers of patent medicines and tobacco manufactures were early U.S branding pioneers. Patent medicines were vigorously promoted.

### **2.2.1 BRANDING IN 19<sup>TH</sup> CENTURY**

The development of consistent quality consumer products that could be efficiently sold to consumers through mass market advertising campaigns. In this fertile branding environment, mass produced merchandise in packages largely replaced locally produced merchandise sold from bulk containers.

This change brought about the widespread use of trademarks. The top management largely drove the development and management of the brands. National manufactures sometimes had to overcome resistance from consumers, retailers, wholesalers, and even employees from within their own company. To do so, these firms employed sustained “push” and “pull” efforts to keep both consumers and retailers happy and accepting of national brands. Consumers were attracted through the use of sampling, premiums, product education brochures, and heavy advertising. Retailers were lured by in store sampling and promotional programs and self-maintenance assistance.

### **2.2.2 BRANDING IN 20<sup>TH</sup> CENTURY**

**EARLIER 20<sup>TH</sup> CENTURY:** Manufacturer brands had become well established in US and Europe on both a regional and national basis. More increased acceptance and admiration of manufacturers brand by consumers. The marketing of brands became more specialized under the guidance of functional experts in charge of production, promotion, personal selling, and other areas. This greater specialization led to more advance marketing techniques. Design professionals were enlisted to assist in the process of trademark selection. Personal selling becomes more sophisticated as salesmen were carefully selected and trained to systematically handle accounts and persuasive copy and slogans. Government and industry regulation came into place to reduce deceptive advertising. Marketing research became more important and influential in supporting marketing decisions.

Although functional management of brands had these virtues, it also presented problems. Because responsibility for any one brand was divided among two or more functional managers as well as advertising specialists, poor coordination was always as potential problem.

**MID 20<sup>TH</sup> CENTURY:** After World War II, the pent up demand for high quality brands led to an explosion of sales. Personal income grew as the company took off, and market demand intensified as the rate of population growth exploded. Demand for national brands soared, fueled by a burst of new products and receptive and growing middle class. Firm after firm during this time period adopted the brand management system.

In brand management system, a brand manager took “ownership” of a brand. A brand manager was responsible for developing and implementing the annual marketing plan for his or her brand, as well as identifying new business opportunities. The brand manager might be assisted internally by representatives from manufacturing, the sales force, marketing research, financial planning, research and development, personal, legal, and public relations and externally by representatives from advertising agencies, research suppliers, and public relations agencies.

**LATE 20<sup>TH</sup> CENTURY:** The sophisticated brand management systems implemented by so many firms were highly successful in creating powerful brand franchises in the 1950s, 1960s, and 1970s.

At the end of 20<sup>th</sup> century, there was growing recognition of value of brands. A number of developments have occurred in recent years that have significantly complicated marketing practices and pose challenges for brand managers.

The most important change is the proliferation of new brands and products, in part spurred by the rise in line and brand extensions. As a result, brand name may now be identified with number of different products of varying degrees of similarity

Another important change in the marketing environment is the erosion or fragmentation of traditional advertising media and the emergence of nontraditional media, promotion, and other communication alternatives. New



ways to reach consumers and create brand value include sports and event sponsorship; in store advertising; mini billboards in transit vehicles, or parking meters, and in other locations; product placement in movies; and interactive, electronic media.

Finally, in addition to all the foregoing reasons, marketers often find themselves responsible for meeting ambitious short-term profit targets because of financial market pressures and senior management imperatives. Many of the managers have experienced rapid job turnover and promotions and may not anticipate being in their current positions for very long. These different organizational pressures may encourage “quick fix” solutions with perhaps adverse long run consequences.

### **2.3 CONCEPT OF BRAND EQUITY**

One of the most popular and potentially important marketing concepts to arise in the 1980s was the concept of brand equity. The emergence of brand equity, however, has meant both good news and bad news to marketers. The good news is that it has raised the importance of the brand in marketing strategy—which heretofore had been relatively neglected—and provided focus for managerial interest and research activity. The bad news is that the concept has been defined a number of different confusion and even frustration with the term (**Annexure A**). Through it all, however, no common viewpoint has emerged as to how brand equity should be conceptualized and measured.

There is no universally accepted definition of brand equity. The term means different things for different companies and products. However, there are several common characteristics of the many definitions that are used today. From the following examples it is clear that brand equity is multi-

dimensional. There are several stakeholders concerned with brand equity, including the firm, the consumer, the channel, and some would even argue the financial markets. But ultimately, it is the consumer that is the most critical component in defining brand equity

Brand equity is the active and residual value a company builds in its customers' universe and to some extent the larger society. Different kinds of brands have different kinds of "hooks", specific equity elements, different from each other and most effective with each kind of brand, that can hold or attract a buyer. Some or that entire list of equity elements may come into play. So, what you should do with brand equity is this: find the "hook", concentrate on it, and brand equity really starts to make sense.

In general sense, most marketing observers agree that brand equity is defined in terms of the marketing effects uniquely attributable to the brand. That is, brand equity relates to the fact that different outcomes result from the marketing of product or service because of its brand name or some other brand element, as compared to outcomes if that same product or service did not have that brand identification. Although a number of different views of brand equity have been expressed, they all are generally consistent with the basic notion that brand equity represents the "added value" endowed to a product as a result of past investments in the marketing for the brand. Researchers studying brand equity at least implicitly agree on a number of other general points, too. They all acknowledge that there exist many different ways that value can be created for a brand; that brand equity provides a common denominator for interpreting marketing strategies and assessing the values of a brand; and that there exist many different ways that the values of the brand can be manifested or exploited to benefit the firm. Despite this commonality, the specific approaches to motivating and defining

brand equity can vary particular approach that will be used throughout the text.

## **2.4 SOURCES OF BRAND EQUITY**

What causes brand equity to exist? How do marketers create it? Brand equity occurs when the consumers have a high level of awareness and familiarity with the brand and holds some strong, favorable, and unique brand associations in the memory.

The following are the sources of brand equity.

### **2.4.1 BRAND AWARENESS**

The process of branding requires “labeling” a product through one or more brand elements (e.g. a brand name, logo, or symbol) and creating “meaning” for the brand as to what it is and how it is different from other brands through product design and the manner by which it is marketed. Awareness refers to the strength of a brand’s presence in the consumer’s mind. **Brand awareness** is related to the strength of the resulting brand node or trace in memory, as reflected by consumers’ ability to identify the brand under different conditions. It can be a driver in some categories, and it usually has a key role to play in brand equity. Brand awareness reflects both the knowledge and the salience of the brand in the customer’s mind.

Creating brand awareness involves giving the product an identity by linking brand elements to a product category and associated purchase and consumption or usage situation. From a strategic standpoint, it is important to have high levels of brand awareness under variety of conditions and circumstances.

## **Types of Brand Awareness**

The two main types of brand awareness are:

- Brand Recognition
- Brand Recall

**BRAND RECOGNITION:** Brand recognition relates to consumers ability to confirm prior exposure to the brand when given the brand as a cue. Recognition reflects familiarity gained from past exposure. Recognition does not necessarily involve remembering where the brand was encountered before, why it differs from other brands, or even what the brand's product class is. It is simply remembering that there was a past exposure to the brand. In other words, brand recognition requires that consumer can correctly discriminate the brand as having been previously seen or heard. For example, when consumers go to the store, will they be able to recognize the brand as one to which they had already been exposed.

The familiarity factor can be especially important to the brand that has a familiarity handicap with respect to move visible and established competitors. In such case, awareness- building may be necessary to reduce this liability.

**BRAND RECALL:** A brand is said to be recall if it comes to consumers' minds when its product class is mentioned. Brand recall relates to consumers ability to retrieve the brand from memory when given the product category, the needs fulfilled by the category, or a purchase or usage situation as a cue. In other word, brand recall requires that consumers correctly generate the brand from memory when given a relevant probe. Customer recalls brand can be the deciding factor in getting on a shopping list or receiving a chance to bid on a contract.

### **2.4.2 BRAND IDENTITY**

Brand identity includes brand names, logos, positioning, brand associations, and brand personality. A good brand name gives a good first impression and evokes positive associations with the brand. A positioning statement tells, in one sentence, what business the company is in, what benefits it provides and why it is better than the competition. Brand personality essentially adds emotion, culture and myth to the brand identity by the use of a famous spokesperson, a good example of which is the Merrill Lynch bull. Brand associations are the attributes that customers think of when they hear or see the brand name. It is a visual connector from the company to the individual customer. A good brand identity stands out from its competitors, as it demands attention and more effectively markets to its audience. A good brand identity communicates directly and indirectly. It consciously and subconsciously draws a consumer to a product, line, or service ... and to the company. A good brand identity is a primary contributor to the bottom line of increased revenues.

### **2.4.3 BRAND IMAGE**

Brand image long has been recognized as an important concept in marketing. ***Brand Image*** can be defined as perception about a brand as reflected by the brand associations held in the consumer memory. Marketing programs that link strong, favorable, and unique associations to the brand in memory creates a positive Brand Image. The strengths, favorability, and uniqueness of brand associations plays an important role in determining the differential response that makes up brand equity, especially in high involvement decision setting where consumer motivation and ability are sufficiently present.

Brand image is brand's personality. Brand equity is the worth of the image and its strength as judged by its ability to remain unaffected by temporary changes in any of the comprising factors. Consumers have only one image of a brand, one created by the deployment of the brand assets at company's disposal: name, tradition, packaging, advertising, promotion posture, pricing, trade acceptance, sales force discipline, customer satisfaction, repurchases patterns, etc. Clearly some brand assets are more important to product marketers than to service marketers, and vice versa. Some competitive environments put more of a premium on certain assets as well.

Brand image looks at the promises the brand makes to customers. It also helps you determine how brand stacks up the competition, how purchase decisions are made in category, and where brand might be extended.

#### **Brand image has two components**

- Brand Associations
- Brand Persona

#### **2.4.4 BRAND ASSOCIATIONS**

Brand associations help understanding the benefits brand delivers to customers and the role it plays in their lives. It determines the power of benefits brand offer and, ultimately, how valued brand is. Features and attributes of product or service are undifferentiated unless they translate into a higher order of perceived benefits to the customer. Similarly, benefits are relatively weak unless they link to the customer's central values and beliefs.

Brand associations come in many different forms. One way of distinguish among brand associations by their level of abstractions, that is, by how much information is summarized or subsumed in the association. Along these lines, brand associations can be classified into three major categories of increasing

scope: attributes, benefits, and attitudes. Several additional distinctions can also be made within these categories according to the qualitative nature of the association.

**BRAND PERSONA:** Brand associations are half part of brand image. Brand persona is the other half. Independently, the halves provide little value. Together they provide you a deep understanding of brand's image, its strengths and weaknesses, and its points of differentiation. A well understood brand image ultimately leads to a positioning that is valued, unique, creditable, and sustainable.

Brand persona is the set of human characteristics that consumers associate with the brand, such as personality, appearance, values, likes and dislikes, gender, size, shape, ethnicity, intelligence, socioeconomic class, and education. These bring the brand to life and allow consumers to describe it to others as they would a friend.

Similarly, consumers decide whether they want to be associated with a brand in much the same way and for the same reasons that they want to associate with some people and not others. Personas can be translated into selling propositions when they are attractive. If a persona is unattractive, however, it's necessary to fix the brand so that customers do want to be associated with it.

#### **2.4.5 PERCEIVED QUALITY**

Perceived quality is a brand association that is elevated to the status of a brand asset for several reasons:

1. Among all brand associations, only perceived quality has been shown to drive financial performance.
2. Perceived quality is often a major (if not the principal) strategic thrust of a business.

3. Perceived quality is linked to and often drives other aspects of how a brand is perceived.

Creating Perceptions of Quality: Creating a quality product or service, however, is only a partial victory; perceptions must be created as well. Perceived quality may differ from actual quality for a variety of reasons:

1. Consumers may be overly influenced by a previous image of poor quality. Because of this, they may not believe new claims, or they may not be willing to take the time to verify them.

2. A company may be achieving quality on a dimension that consumers do not consider important. When Citibank dramatically increased back-office efficiency by automating its processing activities, the expected impact on customer evaluations was disappointing.

3. Customers, it turned out, either did not notice the changes or did not recognize any benefit from them. There is a need to make sure that investments in quality occur in areas that will resonate with customers.

4. Consumers rarely have all the information necessary to make a rational and objective judgment on quality and even if they do have the information, they may lack the time and motivation to process it. As a result, they rely on one or two cues that they associate with quality; the key to influencing perceived quality is understanding and managing these cues properly. Thus, it is important to understand the little things that consumers use as the basis for making a judgment of quality. If consumers kick a car's tires to judge its sturdiness, then the tires had better be sturdy.

5. Because consumers may not know how best to judge quality, they may be looking at the wrong cues. For example, jewelry stores that cater to first-time diamond buyers must educate consumers that quality is not necessarily reflected in price tags or carat claims. A metaphor or visual image can help consumers see the context in the right way.



## 2.4.6 BRAND LOYALTY

Loyalty is a core dimension of brand equity and is a way to gauge the strength of a brand. It represents a barrier to entry, a basis for a price premium, and time to respond to competitive innovations. The variety of measures used for brand loyalty usually is a combination of one or more of the following:

- **Price/demand measures**--focus on a brand's ability to command a higher price or make consumers less sensitive to price increases than price increases for competing brands.
- **Behavioral measures**--focus on consumers' behavior.
- **Attitudinal measures**--focus on general evaluative measures such as 'liking' or 'disliking.'
- **Awareness measures**--focus on identifying a brand as being associated with a product category.

A market can usually be divided into the following groups:

1. **Noncustomers** (those who buy competitor brands or are not product class users),
2. **Price switchers** (those who are price-sensitive),
3. **Passively loyal** (those who buy out of habit rather than reason),
4. **Fence sitters** (those who are indifferent between two or more brands), and
5. **The committed.**

**The challenge is:**

1. To improve the brand's loyalty profile,
2. To increase the number of customers, who are not price switchers,
3. To strengthen the fence sitters' and committed's ties to the brand, and

4. To increase the number who would pay more (or endure some inconvenience) to use the brand or service.

## **2.5 MANAGING BRAND EQUITY**

Consistency is the key to successfully building and managing brand equity. Having a long-term outlook and projecting a consistent image of your brand to the customer will maximize the results of building brand equity. It is critical for managers to realize that brand equity can have positive as well as negative effects on a product or company. In the end, it is the customer that truly defines what brand equity means.

If management feels it is necessary to change the direction of a brand or change a product it must be careful not to change too quickly. There are many examples of companies that have changed a product or brand too much or too quickly. On these occasions, consumers met changes with adverse reactions. The most famous example is Coca-Cola. They changed the formula of their flagship product Coke, and consumers reacted so poorly to the new product that the old formula was reintroduced and the new formula eventually was discontinued. The consumer through the product experiences brand equity. The product has certain attributes or characteristics that deliver the equity to the consumer. If any of these attributes are changed or eliminated, the equity delivered to the consumer is also changed.

Managing brand equity is a continual process with long-term implications. Unfortunately, many brand managers are forced to focus on short-term goals such as market share and profits. Many programs that are implemented to boost short-term sales or market share may be detrimental to the long-term viability of the brand. For example, Proctor & Gamble has started to test market a program to move away from using coupons to a system of every

day low prices. This is, in part, because consumers may become loyal to the coupon or promotion and not to the product itself. Constant promotional programs erode margins and eventually brand loyalty. Ultimately, brand equity is damaged. In 1988 Graham Phillips, Chairman of Ogilvy and Mather Worldwide, said, "I doubt that many would welcome a commodity marketplace in which one competed solely on price, promotion and trade deals, all of which can be easily duplicated by competition. This would lead to ever decreasing profits, decay, and eventual bankruptcy. About the only aspect of the marketing mix that cannot be duplicated is a strong brand image." This quote clearly demonstrates the importance of managing brand equity. In many categories, brand equity is the only point of differentiation between products.

Many people may think that building and maintaining brand equity is solely the responsibility of brand managers, but it is actually a cross-functional team effort. Financial managers are important because they can fully analyze the costs of maintaining and building brand equity. For example, launching a new brand is extremely consuming in terms of money and time. It may be more cost effective to extend a current brand than introduce a new brand. Marketing research is critical for many obvious reasons. It develops most, if not all, of the research and data that companies will use for deciding strategic issues. Marketing research can also help determine how brand equity is actually measured. Once a definition of brand equity is established, the responsibility of tracking and measuring it will belong to the marketing research department. Brand managers ultimately bring all of the parts together and decide the direction of the brand.

## *Chapter 3*

### **JOHN PLAYER GOLD LEAF**

#### **3.1 INTRODUCTION**

JPGL is a longstanding single largest brand in the medium segment in the following markets – Bangladesh, Sri Lanka, Pakistan and the UAE. In the subcontinent its success is attributed to consumer perceptions of JPGL being a truly international offer that is produced locally.

#### **3.2 BACKGROUND**

##### **3.2.1 JOHN PLAYER- THE MAN**

*John Player* was inspired by the spirit of sea faring since his childhood, thanks to the tales of adventures at sea that he had heard owing to his family's history in the navy. In fact, he was so inspired by the spirit of sea faring, that it became deeply imbedded in the way he saw the world.

When he started his business, he followed those very principles that he had been influenced by; to the extent that he chose to use a sailor in his pack design, as he felt that the sailor was a living symbol of all that he believed in.

##### **3.2.2 JOHN PLAYER- THE ENTREPRENEUR**

By the age of 23 John Player had moved to create his own business. Enterprising from the very start, John Player was continuously on the lookout for opportunities to expand his business. Thus by 1863, he had begun to import tobacco by sea from across the globe. The soon became the

lifeline of his business, and he was so committed to it that till today John Player's name is remembered.

At the time John Player began selling tobacco to the public, it was generally sold loose. The customer would buy it by weight and the tobacconist would scoop it out of large jars and wrap it up in a sheet of paper. He was amongst the first to realize that people had individual preferences for different types of tobacco. So he made a time saving business decision to pre pack.

That business decision not only made him a very wealthy man, but also created the foundations of the modern tobacco industry.

### **3.3 LANDMARKS IN THE LIFE OF JPGL**

The brand mix across countries has over the years 1994-2000 met with several evolutionary changes. A summary of these changes are listed below:

**1994:** Development of the brand world and advertising around the theme of maritime adventure

Launch of new packaging [prior to this, only the Bangladesh and Sri Lanka packs were similar. The packs in Pakistan and Middle East (imported from London) were different]

**1998:** Launch of JPGL Lights met with limited success in most markets. The Lights pack was subsequently redeveloped and relaunched in Bangladesh and Sri Lanka where it received a more favorable response.

**1999:** First ever promotion campaign based on the maritime theme of 'Voyage of Discovery'. This campaign received wide media coverage and also evoked an encouraging response from most markets

**2001:** Voyage of Discovery now renamed 'World Adventure' with some changes in execution. Further, new JPGL Lights was launched based on the findings of a multi country research study.

It is clear that the brand has evolved over the past few years, at a fairly rapid pace. While the current performance of the brand is encouraging.

## *Chapter 4*

### REVIEWING THE JOHN PLAYER GOLD LEAF

#### **BRAND EQUITY STUDY**

The whole chapter is on reviewing of JPGL brand equity study conducted by **Quantum Market Research Private Limited** for PTC. In order to gain a holistic understanding of the brand, the Company wishes to conduct a study to determine the current equity of the brand. During the study different aspects, which are important for establishing the equity of JPGL, are well conceive. The finding from this study would act as input to develop future brand strategy and directions.

#### **4.1 RESEARCH METHODOLOGY**

##### **4.1.1 RESEARCH SAMPLE**

We conducted a total of 7 groups across Pakistan. The centers and the research sample are listed in **Annexure B**.

##### **4.1.2 FIELDWORK**

All respondents were recruited by means of a questionnaire. Only those respondents fulfilling the criteria were invited to the groups.

##### **4.1.3 OBJECTIVES**

The primary objective of the study was to assess the core equity of the JPGL brand so as to:

- ❖ Assess the brand standing of JPGL vis-à-vis the competitors

- ❖ Evaluate the loyalty and the involvement that the brand generates vis-à-vis competitor brands
- ❖ Evaluate product quality perceptions and the competitiveness of the product in terms of the smoke quality and smoking experience
- ❖ Obtain the brand Identity of JPGL
- ❖ Isolate core values of JPGL
- ❖ Identify the values which are under threat and need to be strengthened
- ❖ Identify new values that need to be inducted in order to enhance the competitive edge of JPGL
- ❖ Obtain the core equity of the brand
- ❖ Obtain current image dimensions of the brand and whether the desired values of “modern, international and youthful” are a part of current image
- ❖ Understand the decoding and interpretation of “ modern” in the context of each market and culture and determine whether the JPGL “modernity” dimensions are in synch with these interpretations
- ❖ Evaluate the contribution of the pack to the equity
- ❖ Impact of the Lights variant on the equity of JPGL
- ❖ Evaluate the role of advertising and promotions, particularly Voyage of Discovery/ World adventure promotions in the equity
- ❖ Determine the significance of Maritime Heritage:
  - Consumer decoding



- Relevance for the brand/consumer
  - Desired expressions
- ❖ Evaluate the role of pricing in shaping the equity
- Obtain consumers perceptions of price-value equation in cigarette per se
  - Understand current price-value perceptions regarding JPGL
  - Obtain new values that can be inducted to make JPGL brand standing less price-sensitive

## 4.2 BRAND STANDING

Brand standing is an important aspect of assessing a brand's salience in the market and in the consumer's mind.

The table (**Annexure C**) reveals the brands that consumers in Pakistan consider as acceptable, non-acceptable and highly aspirational for themselves. In Pakistan, JPGL is seen as being part of an international brand cluster. Users of the brand assess it as being a high value product that has international quality coupled with a respectable and premium image. JPGL continues to be aspirational amongst lapsed users and occasional users of the brand.

The current barrier to its consumption is that the Karachi consumer considers its price hike as establishing the brand as being out of their reach. Consumers in Sialkot on the other hand, also mention the prevalence of "fakes" or counterfeit JPGL cigarettes, which acts as a barrier to use.

The Benson & Hedges consumer sees himself as having evolved into the segment of higher order international brands. However, JPGL still features

within his consideration set on account of its international value and respectable image.

In Pakistan, JPGL emerges with a very strong competitive standing, amongst majority of the consumers. The brand has been able to strike a perfect balance between international quality and status on one hand and local heritage on the other. Its consistent delivery in terms of both product and image attributes has also contributed to its strong salience.

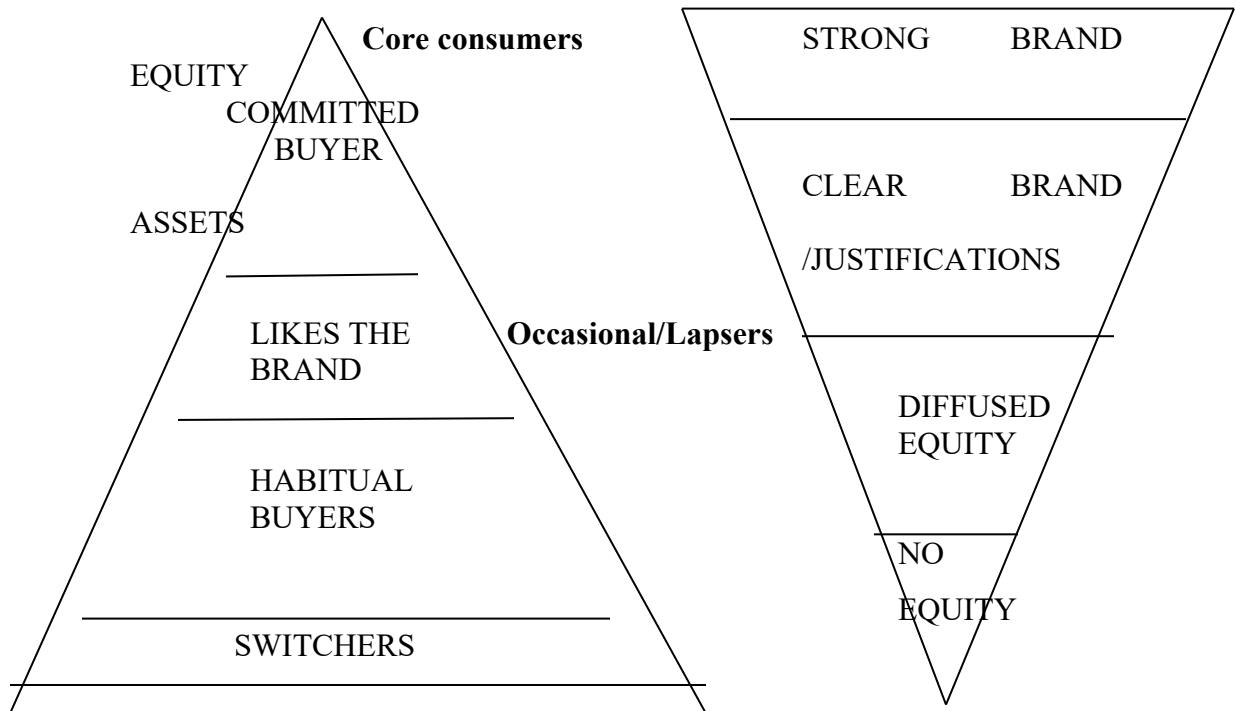
#### **4.2.1 COMPETITIVE STANDING**

The competitive standing of JPGL is currently strong; it needs to take note of the increasing competitive activity in the market. Two brands, Capstan and Red and White appear to have stepped up their marketing activities and taken a large share of the consumer's mind space. Capstan has been recently relaunched with an "international" suffix, which appears to have instantly enhanced the brand's product and image values. Red and White, on the other hand has a communication based on a similar theme of heroism which is appealing to the younger male consumer.

#### **4.3 BRAND LOYALTY**

Brand loyalty is a two-way commitment. It is based on the extent to which consumers bond with the brand as well as the level the brand is involved with the consumers.

The following diagram illustrates the Pakistani consumer's level of relationship with and commitment to the brand.



Brand loyalty is another important aspect of a brand's equity as it reveals consumer commitment to a brand.

#### Relationship with JPGL

Core Users	Lapsers/ Occasional	Benson & Hedges
<ul style="list-style-type: none"> <li>• Wife</li> <li>• Life partner</li> <li>• Lover</li> <li>• Best friend</li> <li>• Girlfriend</li> <li>• Brother</li> </ul>	<ul style="list-style-type: none"> <li>• Friend</li> <li>• Girlfriend</li> <li>• Dependable companion</li> </ul>	<ul style="list-style-type: none"> <li>• Old friend</li> <li>• Long standing friend</li> </ul>

The brand has been able to successfully harness powerful paradoxes such as have heritage as well as be contemporary, have international connotations

but be integrated into the local culture, have status associations yet be approachable. All the above contribute to a high sense of loyalty with the brand.

Brand loyalty is further strengthened by the high positivity of the brand. It is seen as being a dependable and honest brand that is capable of delivering a clear set of benefits, in a consistent manner. It has an aura of refinement as it is completely devoid of the 'harshness' or 'coarseness' that are seen to characterize local products. The brand is the flagship brand in Pakistan and as such evokes a powerful sense of pride. It compels even non-users to view the brand with respect and warmth.

#### **4.4 PERCEIVED PRODUCT QUALITY**

Consumers across user segments in this region unanimously perceive JPGL as offering a superior quality cigarette and a refined smoking experience. They see it as a product that has been able to well conform to international product standards.

Its **tobacco quality** is seen as being of a premium, international nature, described as being Virginia or Gold Leaf. The tightly packed nature of the tobacco as well as its consistent quality adds to positive perceptions.

Core smokers of the brand mention **filter** as being of good quality and of a premium king size nature.

The brand is seen as having a distinctive **taste** that has almost become a benchmark in the category. It is believed to provide a full bodied though not excessively strong smoke. Its taste is described as being satisfying although many consumers do complain of the counterfeit JPGL having a bitter taste. The perceived widespread availability of counterfeit JPGL has somewhat reduced the positive taste connotations of the brand.

It is seen as maintaining a right balance between **strength** and smoothness. It does not harm the throat although the counterfeit one in Pakistan is believed to make one cough.

Its **aroma** is seen as being mild and pleasing without the unpleasant “stink” of tobacco.

Consumers describe its **smoking experience** to be refined and satisfying.

JPGL, across consumers stands for an unequivocally good product quality and smoke experience that is at par with international standards. Its taste has become a benchmark in evaluation – strong, yet refined and smooth. The strength of the brand lies in its delivery of a consistently high quality.

#### **4.5 PRICE VALUE EVALUATION**

In **Pakistan**, the price hike in JPGL has impacted on the economy in use perceptions of the brand. In fact lapsed users cite increased price as one of the key reasons for moving out of the brand. While they continue to perceive value in the brand, they simply cannot afford to buy it.

There has been an obvious dilution in the economics of using JPGL in the minds of the consumers in Pakistan. The price hike has been largely responsible for this as it has led to the brand becoming inaccessible and out of reach of the consumers. The high media blitz and marketing activity around competitive brands in Pakistan have further highlighted JPGL’s inaccessibility. In addition, the problem of counterfeits has led to a dilution of the quality and value perceptions of the brand.

Currently JPGL faces the problem of a substantial increase in price without a corresponding change or development in its marketing mix. Such a scenario has led JPGL to be increasingly viewed as an expensive brand rather than a

clear value for money offer. Users of the brand also express dissatisfaction with the price increase.

There is evidence to suggest that the closer the brand gets to Benson & Hedges (destination brand) in price terms, its value for money perceptions weaken. Such a reaction is largely due to the fact that at the Benson & Hedges price point the core motivation to use the brand, are its implications of personal wealth and lifestyle. In the case of JPGL, a high price does not work in its favor, as unlike Benson & Hedges, it is not perceived as being a brand that is linked with lifestyle. On the contrary, it is seen as representative of all the positive middle class values in this region, namely handwork, endeavor, honesty and socio centricity.

## **4.6 PACKAGING EVALUATION**

### **4.6.1 PACK RECALL**

Consumers display high recall of the JPGL pack. The main attention arresting elements in the pack are the red and white colour combination, the monogram of the Captain or John Player and the term “hero” written on the cap. The presence of the ship also acts as a strong attention hook.

The pack is able to spontaneously establish the aspirational values of boldness, leadership, heritage as well as an international image. The pack thus acts as a strong support to all the positive value associations with the brand. There is some recall of the limited edition pack of the Voyage of Discovery 2000.

The pack contributes significantly to brand perceptions. It establishes JPGL’s lineage and pedigree. At the product level, it supports the balance between strength and smoothness. It also acts as a strong support for the brand’s heroic masculine values.

## **4.6.2 DECODING OF PACK ELEMENTS**

The study have endeavored to decode the critical elements of the pack as the consumers see them so as to gain an insight into what each element actually signals to the consumers.( **Annexure D**)

The pack is associated with the positive image values of maturity, respect heritage and status. It lends the brand a brave, fearless, down to earth and pleasing personality. It also establishes a sober, worldly wise and “immortal” image.

The pack forms a critical part of the brand’s physical equity. It contributes significantly to brand perceptions and unequivocally establishes JPGL’s lineage and pedigree. At the product level, it not only complements the balance between strength and smoothness but also acts as a strong support for the brand’s heroic masculine values.

## **4.7 EVALUATION OF ADVERTISING**

### **4.7.1 RECALL**

The JPGL advertising spontaneously evokes associations with the sea, ships, sailors and essentially a spirit of adventure. Whilst consumers appear to be unsure of the advertisements’ exact storylines, they however perceive the general communication theme to be based on heroic acts and the pursuit of adventure.

The ‘Voyage of Discovery’ campaign finds sporadic mention only amongst core JPGL consumers in Karachi. These consumers react positively to this series and perceive it as clearly enhancing the international and global status of the brand.

Unfortunately, the Voyage of Discovery, World Adventure promotions do not appear to have impacted significantly on majority of consumers. The possible reason for this lack of impact could be JPGL's already powerful association with the sea / maritime adventure, which possibly creates a wallpaper effect thereby discouraging the decoding of any new news. Four press advertisements were evaluated in the course of the study. Consumers positively evaluate the advertisement as being exciting, thrilling and involving. They feel that it is able to successfully reaffirm the brand values of courage, adventure, team spirit and bonding.

**No. #1 Sunset** It is seen as communicating the successful completion of a mission. It is associated with the idea of reaping rewards, happiness and bonding.

**No. #2 Red & Yellow boat** This idea is linked with team spirit, determination and a sense of expectancy. Consumers also perceive it as having an international and premium look.

**No. #3 3 men, waves in background** The dominant values evoked here are high masculinity, adventure, physical power, challenges and endurance.

**No. #4 Twilight; sail and steer** This advertisement is seen as depicting a special moment that is both beautiful and eye catching. It is associated with the values of smoothness, premiumness, adventure and fun.

The advertising campaign provides strong reassurance on the product attributes of a strong, yet smooth smoke as well as the after smoke benefits of relaxation and tension abatement. At the emotional level, it successfully addresses the aspirations of the consumer, namely that of being a hero, seeking adventure and trying to conquer the indomitable.



The campaign clearly establishes the brand's **maritime heritage**. The sea and JPGL are seen to mirror the similar values of vastness, grandeur, handwork, enterprise, honesty and adventure. The associations with sea / maritime adventure have, over the years, established and strengthened an identity for JPGL which is characterized by the values of power, adventure and freedom, excitement, energy, determination and strength.

The theme of "**maritime adventure**" holds high relevance for the consumer as it is in consonance with the archetypal 'hero' myth. It appeals to the consumers' male psyche.

However, whilst the advertising proposition is successful in establishing desired brand values, it fails to evoke high charge amongst the consumers. The linkages that are formed between JPGL, the sea and adventure makes consumers see the advertisements as a continuation of the same story instead of a new story everytime. All JPGL advertising currently is seen to be set against more or less the same backdrop, which is thus beginning to have a wallpaper effect.

It is necessary to depict clear differences in the portrayed environment and portrayed activity. There must also be constant changes or several executions of the above to keep up that momentum.

## **4.8 PHYSICAL AND EMOTIONAL IDENTITY OF THE BRAND**

### **4.8.1 PHYSICAL IDENTITY**

The **brand name** "Gold Leaf" has positive connotations for consumers. It is seen to signify a reputed and world-renowned brand. Most consumers associate it with a strong international heritage. The name is seen to connote

a popular, established and respected brand. The company has strong reliability associations and is looked upon with a high degree of good will, regard and appreciation.

In terms of its **product attributes**, JPGL is seen as conforming to international standards. It is described favorably as having good tobacco content in addition to a good filter, both of which contribute to its distinctive flavour. It is seen as providing a strong but smooth smoke. The cigarette is also seen as being consistent in its benefit delivery.

In Pakistan, the **price** of Rs. 35 is seen as being unduly high and makes the brand expensive. It lowers the price value equation of JPGL, which then calls for value enhancements in order to support the price hike.

The red and white **packaging** of the brand is described as being attractive and aesthetically appealing. It is seen as lending the brand a distinct identity of its own. It also carries strong cues of international pedigree and heritage.

#### **4.8.2 EMOTIONAL IDENTITY**

Brand imagery and personality are important indicators of a brand's salience in the consumer's mind. It reveals interesting insights regarding the way consumers perceive the brands in the market place, the strengths and weaknesses they associate with the brand.

##### **PERSONA**

Consumers were asked to imagine JPGL as a person and construct a personality for it. The personality dimensions that emerged from consumer perceptions

- 25-30 years
- Educated
- A VIP
- Person with standard and status

- Like George Bush or General Musharaff
- Brains and physical power
- Can take important decisions
- Figure of authority
- Cons people at times (Sialkot)

### **BRAND WORLD**

The brand world technique was used to understand the overall feel of the brand and the dominant images associated with it. These are listed below:

- Sailor's world
- Island in sea
- Upper class
- Calm, relaxed peaceful
- Friendly environment
- Bold people
- Fight against all odds
- World of captains / generals
- Navy, army officers
- Hardworking
- There is adventure
- Leaders

### **ASSOCIATIONS**

The following metaphorical associations reflect the image and identity acquired by JPGL in the minds of the consumers.

- Lion
- Fish
- Panther
- Eagle
- Cheetah

In short, the brand has a favorable image and identity in this region. It is associated with the aspirational values of power and courage. The brand is positively linked with consumer respect and satisfaction.

The brand's emotional identity reveals its rooting in the aspirational masculine values of power, prestige and boldness. It evokes a sense of achievement and status enhancement. It is of some significance to note that whilst the identity is characterized by physical power and strength, it is simultaneously balanced by cues of intellect or intelligence thus offering a sense of refined power rather than rustic brawn.

The brand's success and uniqueness lies in its ability to cast its identity in the relevant aspirational mould for each country. In Pakistan, it has an army or defense linked persona, which is seen as epitomizing power, control and success.

#### **4.8.3 BRAND IDENTITY PRISM**

### Physique

- Gold Leaf
- John Player / Captain
- Red & White pack
- Good quality tobacco / filter
- International standards
- Strong + smooth smoke
- Consistent quality
- High price

### Relationship

- Empowerment

### Reflection

- Courageous
- Enterprising
- Adventurous
- Team spirit
- Contemporary



### Personality

- Powerful
- Respected
- Honest
- Status, yet approachable
- Sociocentric
- Bold
- Authority

### Culture

- Stereotypical masculine
  - courage
  - strength
- Mainstream national + global

### Self Image

- Progressive
- Upwardly mobile
- World citizen
- Respectable
- Sense of refinement
- In control
- Achievement driven

The study reveals JPGL as having a strong brand identity in this region. It has clear physical identifiers, an aspirational persona and a rooting in a powerful masculine culture. It is also characterized by high positivity across users.

The main issue that demands immediate attention in this region is the presence of a “duplicate JPGL”. It is necessary to control this trend that carries the risk of damaging the honesty and integrity of the brand.

JPGL’S Associations with International and Contemporary values

Consumers in Pakistan perceive JPGL “international” and “contemporary.”

Consumers make a clear distinction between ‘modern’ and ‘contemporary’ wherein the former is described as being trendy, youthful and signifying the

“latest.” The latter on the other hand implies relevance to the present times. It is gauged on the extent of the ability to maintain one’s popularity and demand in the market.

JPGL emerges as being contemporary rather than modern. It is associated with a solid heritage, consistency of quality and an aspirational image of the archetypal / eternal hero, all factors that contribute significantly to its continued relevance.

## **4.9 CORE EQUITY**

Brand equity is a set of brand assets and liabilities linked to a brand, its name and symbol, which add or subtract from the value provided by the product. One of the techniques were used to gain an insight into the brand’s physical and emotional equity is the house building exercise, the rationale behind it being that each brand value is considered to be a brick that is to be used for building the house. Therefore, the values that are used to build the foundation or the essence of the house, its walls or support and so on give us an indication of their worth.

### **4.9.1 PHYSICAL EQUITY**

In this region, the strong physical equity of the brand is driven by its delivery of a consistent quality and a highly satisfying smoke experience. The main area of concern however is that the brand appears to be losing out on its value for money perceptions. **(Annexure E)**

### **4.9.2 EMOTIONAL EQUITY**

The brand currently has strong emotional equity in this region. Its key emotional essence lies in its ability to offer consumers a balance between

heritage and international connotations (**Annexure F**). The synthesis between the knowledge and experience of the former attribute and the progressive values and superior quality perceptions of the latter lend the brand a unique sense of dynamism.

Care must however be taken to support this dynamism via relevant market activities and promotions so as to reduce the danger of the brand from being viewed as “complacent.” This assumes importance particularly given a highly competitive market scenario where other brands continuously step up their market activities.

## **4.10 CONTRIBUTION OF JPGL LIGHTS TO JPGL EQUITY**

### **4.10.1 AWARENESS AND OVERALL PERCEPTIONS**

There is awareness of JPGL lights in Pakistan, although it has little relevance or appeal for these consumers. In general, it is characterized as being excessively mild and lacking in smoking gratification. It has low value for money connotations and is seen as being primarily for women or “less strong” men.

The brand extension has not been able to establish its own distinct benefits. There is therefore low brand loyalty. In fact consumers continue to rate FF higher on all product / image parameters.

As far as consumer **relationship** with JPGL and JPGL Lights is concerned, the former is described as a family patriarch or an elder brother. The latter on the other hand is seen as being a stepson or a younger sister. Consumers in Pakistan take the extreme view of perceiving it to be a dead member or an useless family member. JPGL’s role in the family is seen as being peripheral. It is seen as offering a low contribution to the family.

The brand extension to Lights is not seen as contributing to net brand worth. It does not enhance or add to JPGL benefit basket except for some very trivial cues of smoothness, modernity and premiumness. In fact, it serves to weaken JPGL's taste – satisfaction equation on account of perceptions of “poor taste.” “No kick” and “poor tobacco quality.” The other key weakness is its negative impact on the JPGL image values of masculine strength and power.

**Lights is associated with the following image:**

- 15-16 years
- Young girl / boy
- Shy
- Not ambitious

Thus bringing in effeminate and weak cues.

Two possible scenarios emerge wherein it could remain at the periphery and never become a powerful variant or current Lights category perceptions could lead to devaluing the parent brand. This is particularly possible given the fact that JPGL values seen to be completely disparate from Lights category values.

The other issue is with the Lights segment in the subcontinent (namely Bangladesh and Sri Lanka) where user ship is a small, niche segment and is driven largely by status. The success of Lights is also limited to a higher SEC. In such a scenario, the route available to promoting JPGL Lights may possibly lie in not highlighting its Light descriptor, but the product superiority in terms of a JPGL special filter or a JPGL premium filter.



## *Chapter 5*

### SUGGESTIONS & CONCLUSION

#### SUGGESTIONS

- There needs to be increased activity on the part of the brand to prevent competitive brands such as Capstan International and Red & White from eating into JPGL's share of mind. The brand's marketing activities must however be in consonance with JPGL values. Firm measures also need to be undertaken against the easy availability of duplicates, which have negatively impinged on the brand's standing.
- It is important for JPGL to maintain its integrity and approachability. There is need to keep supporting and strengthening the international associations with the brand so that its image of being contemporary, active and premium is continuously reinforced. There is also a need to effectively deal with the counterfeit issue.
- The availability of counterfeit JPGL in Pakistan is a cause for concern. It stands the danger of negatively impacting upon the brand's perceived consistency of product quality and thereby diluting its solid reliable image. There is therefore a need to maintain and protect the brand's high quality perceptions in the country.
- A critical need to clearly distance JPGL and Benson & Hedges from one another.
- There is a need to establish a clear role for Lights in the JPGL family, so that it does not erode the honest, hardworking VFM associations with the JPGL brand.

## CONCLUSION

JPGL emerges with a strong, well-defined and cohesive equity in Pakistan. The strong brand standing and the powerful loyalty that it commands is on account of its perceived offer of a consistent, premium quality cigarette. Its offer of status and prestige, in addition to the above make it a part of an international brands set. It evokes nationalistic pride and is viewed as a flagship brand in the country. That's why; JPGL enjoys a 7% market share, which is good because almost 80% of the market belongs to low category brands (due to consumers' affordability issue).

The critical elements of the brand's equity are:

### **Physical equity**

- Distinctive unbeatable taste
- Good quality tobacco
- Smooth yet strong smoke
- Pack
- Roundel
- Maritime prestige and heritage

### Emotional equity

- Prestige
- Status
- Lineage
- Nation's best yet international
- Power with a sense of refinement

In Pakistan, it immediately needs to address the issue of duplicates via exclusive JPGL outlets or JPGL endorsement of retail outlets. These could cause an increase in the brand's authenticity perceptions. It must also keep up and further increase activity around the brand. However, all activities need to reflect and be in synch with the core values of the brand.

**Current Image Dimensions:** The attribute of JPGL being “international” emerges as a core image value in Pakistan. JPGL is also perceived to be a “contemporary” brand on account of its pack, its communication theme, its continuing popularity and the inherent energy of the brand. It is only in the delivery of “youthfulness” that the brand appears to be falling short. It is largely viewed as “mature” brand. It is however important to point out that “maturity” in the context of JPGL is not a negative as the brand derives its aura of authority, respect, leadership, grandeur and heritage from this maturity association. It must be remembered that the subcontinent places a lot of value on heritage and making the brand “too youthful” would upset the inherent balance that JPGL represents and could also weaken the respect that it currently enjoys.

JPGL can never represent the following dimensions of “youth” namely having fun for fun's sake, being frivolous, daredevil, hip and funky. It is however, imperative that the brand retains its contemporary focus via a greater degree of relevant market activity as well as brand extensions. The above would provide the brand the requisite energy and prevent the positive image of “maturity” from becoming associated with the negative values of age, inertia and passivity.

## *A n n e x u r e*

### **ANNEXURE A**

The set of associations and behaviors on the part of the brand's customers, channel members, and Parent Corporation that permits the brand to earn greater volume or greater margins than it could without the brand name and that gives the brand a strong, sustainable, and differentiated advantage over competitors **(Marketing Sciences Institute)**.

The added value to the firm, the trade, or the consumer with which a given brand endows a product. **(Peter Farquhar, Claremont Graduate School)**

A set of brand assets and liabilities linked to brand, its name and symbol, that add to or subtract from the value provided by a product or service to a firm and/ or to that firm's customers. **(David Aaker, University of California at Berkeley)**

The sales and profit impact enjoyed as result of prior years' marketing efforts versus a comparable new brand. **(John Brodsky, NPD Group)**

The measurable financial value in transactions that accrues to a product or service from successful programs and activities. **(J. Walker Smith, Yankelovich Clancy Schulman)**

Brand equity is the willingness for someone to continue to purchase your brand or not. Thus, the measure of brand equity is strongly related to loyalty and measures segments on a continuum from entrenched user of the brand to convertible user. (Market Facts)

Brand with equity provide "an own able, trustworthy, relevant, distinctive promise to consumers.' **(Brand Equity Board)**

## ANNEXURE B

Karachi: 4

Groups	Category	Age (Yrs.)	SEC	Usership
O	Men	20-25	B	Core JPGL
P	Men	30-35	C/D	Core JPGL
Q	Men	30-35	B	Current B & H, ever triers of JPGL
R	Men	20-25	C/D	Current Capstan, Gold Flake, London – lapsed from JPGL

SIALKOT: 3

Groups	Category	Age (Yrs.)	SEC	Usership
S	Men	20-25	B	Core JPGL
T	Men	20-25	B	Current Red & White + Morven Gold, lapsed from JPGL
U	Men	30-35	C/D	Current Red & White + Morven Gold, , occasional smokers of JPGL

## ANNEXURE C

	<b>Core JPGL</b>	<b>Lapsed/Occasional JPGL</b>	<b>Benson &amp; Hedges</b>
<b>Aspirational</b>	<ul style="list-style-type: none"> <li>• Benson &amp; Hedges</li> <li>• SE 555(some)</li> <li>• JPGL</li> </ul>	<ul style="list-style-type: none"> <li>• JPGL</li> <li>• Original JPGL (Sialkot)</li> <li>• Benson &amp; Hedges</li> <li>• Marlboro</li> </ul>	<ul style="list-style-type: none"> <li>• Dunhill</li> <li>• Marlboro Lights</li> </ul>
<b>Substitute</b>	<ul style="list-style-type: none"> <li>• Benson &amp; Hedges (Karachi)</li> <li>• Red &amp; White</li> <li>• Capstan International</li> </ul>	<ul style="list-style-type: none"> <li>• Red &amp; White</li> <li>• Capstan International</li> <li>• London</li> <li>• Gold Flake</li> </ul>	<ul style="list-style-type: none"> <li>• JPGL</li> </ul>
<b>Rejected</b>	<ul style="list-style-type: none"> <li>• Gold Flake</li> <li>• Morven</li> <li>• Royal</li> <li>• K2</li> <li>• Embassy</li> </ul>	<ul style="list-style-type: none"> <li>• K2</li> <li>• Embassy</li> <li>• Royal</li> <li>• Boss</li> <li>• Gold Street</li> </ul>	<ul style="list-style-type: none"> <li>• Local brands</li> </ul>

## ANNEXURE D

Pack element	Semantics
<i>Red</i>	Distinctive •Attractive •Courage •Power •Energy •Adventure •Thrill •Vibrant •Life
<i>White</i>	•Peace •Purity •Freshness •Satisfaction
<i>Golden strip</i>	•High value •Happiness
<i>Roundel</i>	•John Player – international pedigree •Founder, from London •100 years old •Captain / Man in uniform –Hero of the sea –Can handle adverse situations •Face of the brand •International

<p><i>Lettering style</i></p>          <p><i>John Player signature</i></p>	<ul style="list-style-type: none"><li>•Guarantee of product authenticity</li><li>•Ship-global presence</li> <li>•Straight forward</li><li>•Honest</li><li>•“embossed: : premiumness</li> <li>•Signature of founder</li><li>•Authenticity</li><li>•Enhances premiumness</li></ul>
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## ANNEXURE E

<i>Foundation</i>	<ul style="list-style-type: none"><li>•Overall good quality</li><li>•Good quality tobacco</li><li>•Attractive pack</li></ul>
<i>Walls</i>	Good aroma <ul style="list-style-type: none"><li>•Smoothness</li><li>•Good taste</li><li>•Expensive (lapsed JPGL)</li></ul>
<i>Roof</i>	<ul style="list-style-type: none"><li>•Good quality filter</li><li>•Poor filter (Sialkot)</li></ul>
<i>Door</i>	-----

## ANNEXURE F

<i>Foundation</i>	<ul style="list-style-type: none"><li>•Heritage</li><li>•Reliable</li><li>•International</li></ul>
<i>Walls</i>	Leader <ul style="list-style-type: none"><li>•Hardworking</li><li>•For those who love challenges</li><li>•Bold</li><li>•Inspires me</li></ul>
<i>Roof</i>	Upper class <ul style="list-style-type: none"><li>•Team spirit</li><li>•Honest</li><li>•Respect</li><li>•Dynamic (user)•</li></ul>
<i>Door</i>	For determined people <ul style="list-style-type: none"><li>•In control</li></ul>

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