"SO MANY DIFFERENT SUNS"

HOW SUCCESSFUL BRANDS HIT THE CONFLUX OF AFFORDABILITY AND ASPIRATION

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INTRODUCTION

All of us are familiar with the current industry focus on emerging markets. It is also no surprise that the larger consuming population in these markets lies not at the top end, but towards the middle and lower ends of the income pyramid. This is also where marketers struggle the most – how should the offer be constructed to ensure it is affordable yet desirable?

The proposed Theory of Multiple Aspiration & Poverty Lines (MAPL) represented a new and stratified approach to understanding affluence, poverty and aspiration. This has many implications on brand positioning and portfolio strategies for creation of winning brands or "suns".

Objective

The objective of this paper was to take this thinking forward through an exploration as follows:

- Broadly, what are the implications of the Multiple Aspiration & Poverty Lines (MAPL) theory for brand positioning, communication and portfolio management?
- What drives brand success in the Indian context? What strategies have these brands used to achieve success- to what degree are these brands wedded to symbols of aspiration /belongingness in each social class?
- How did the brands that were not so successful in the Indian market falter on making the right connections on these dimensions?

Approach

We identified product categories through which to understand brands and aspirations including durables and FMCG. We examined categories in order to understand category structures as well as to understand the reasons for some key brand successes and failures in these categories.

- For each category we studied price structures and relative positioning of brands, based on desk research.
- We met custodians of selected brands within each category to understand portfolio organization, strategies and perspectives for their brands. This we supplemented with our own analysis of brand discourse through mass media communication over the last two years.
- We analysed the level of aspiration and identification with brands in these categories through an examination of brand image data in these categories.

BACKGROUND TO THIS PAPER: THE MULTIPLE ASPIRATION AND POVERTY LINES (MAPL) CONSTRUCT

Traditionally, *Absolute Income* has been used to measure a consumer's consumption capacity, inclination and pattern. We tend to classify consumers as "affluent", "middle class" and "poor" based on absolute wealth levels.

Given this perspective, marketers tend to focus their effort only on certain income sections, which they believe would have the maximum propensity to spend on the categories that they operate in. We have observed that companies whose offerings straddle across income segments tend to have a three-brand strategy. Typically:

- A "premium' brand aimed at the "affluent" end of the income pyramid;
- A "popular" brand with 'mid-level' pricing, aimed at the "middle class";
- An "economy" brand with lower pricing aimed at the less affluent or the "lower classes".

However our experience and observations have revealed that the consumer's self-perception in terms of his economic standing differs from this definition based on absolute income.[1]

The MAPL Construct: A relative income perspective

The Multiple Aspiration and Poverty Lines (MAPL) theory was born out of a need to understand the structure of aspiration and upgradation with greater depth. The key understanding was that behavior depended not on consumer affluence levels in absolute terms, but on the way they perceived their level of affluence.

According to this construct:

1. Every individual defines a specific social / economic class to which he feels he belongs - a "reference set".
2. Each class has its own standards, "affluence ceilings" and "poverty lines".
3. An individual could *feel poor* or *feel rich* as per the standards of that class.
4. His feelings of affluence or poverty therefore would not have to do with his absolute level of income, but on his economic performance vis-à-vis his own benchmarks.
5. An individual's social and economic behavior is determined by how poor/ rich he feels by the standards for his reference set.

Each social class has two basic boundaries:
- A "Maximum Expected Lifestyle" – the lifestyle that he aspires to achieve. This also serves as a ceiling that he believes he may not surpass. This can also be termed his "Aspirational Lifestyle".
- A "Minimum Acceptable Lifestyle" – the minimum lifestyle level that he can live with, which serves as his 'poverty line'.

Each of these social classes could exist anywhere on the Absolute Income Pyramid. There are therefore multiple social classes each with its Line of Aspiration and Poverty Line. Hence there are multiple Lines of Aspiration and Poverty Lines across the pyramid.

This is represented in figure 1.

FIGURE 1, THE MAPL CONSTRUCT
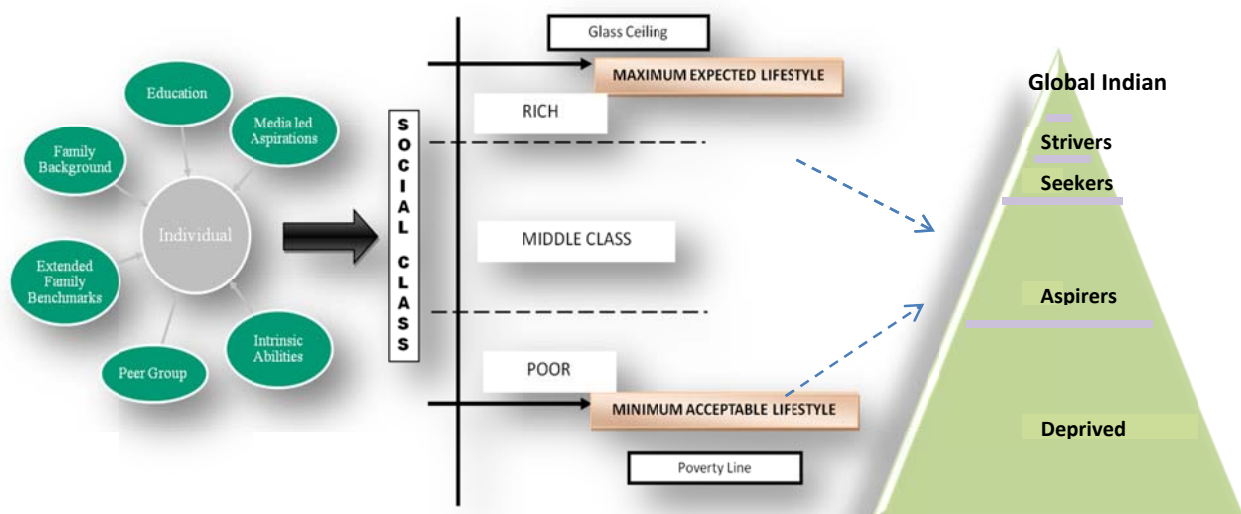
There are therefore not one but several overlapping pyramids within the Absolute Income Pyramid. Upgradation happens at two levels:

1. Upgradation within a Social Class as an individual moves from his Poverty Line towards his Line of Aspiration

2. Upgradation from one social class to another. The individual reaches the Line of Aspiration for his social class- which forms the bottom of the next social class. He then begins a climb in the new social class.

FIGURE 2
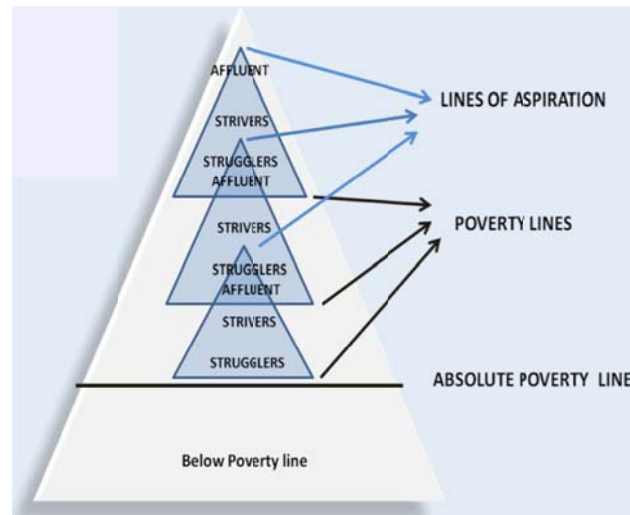
The following analysis examines the manner in which this perspective on Aspiration and Upgradation can lead to a better understanding of brand positioning, brand structuring, success and failure.

We set out to understand how this theory can be used to build a brand framework that can address the following questions that marketers have raised.

Some of these questions were as follows:

- How should brand portfolios be organized?
- What pricing structures can be followed within a brand portfolio for different brands?
- How are these to be positioned- e.g. is a chocolate éclair a premium confectionery or an economy chocolate?
- Mother Brand vs. Sub Brand strategies
- What is the principle for successful creation of sub brands?

DEVELOPING THE MAPL CATEGORY AND BRAND CONSTRUCT
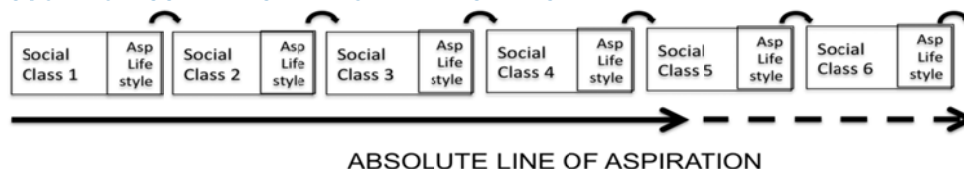
MAPL and aspirational lifestyles

As we have seen in the MAPL construct, each individual perceives himself to be part of a Social Class. Each Social Class has its own set of aspirations.

There are two fundamental concepts that have emerged with regard to aspiration:

- There is an Absolute Line of Aspiration/ Upgradation, which is a long-term upgradation process towards an ultimate goal. This ultimate goal is remote to the consumer at the current point in time.
- There are many Aspirational Lifestyles on this line, which constitute achievable lifestyle goals and which actively drive current behavior. An Aspirational Lifestyle is another term for the Maximum Expected Lifestyle, the pinnacle for a given Social Class.
- It is also clear that at any point in time, an individual sets his sights on an immediately achievable Aspirational Lifestyle. A slum dweller desires a stable viable home, not a mansion. A clerk in an office wants the lifestyle of his manager, not the lifestyle of his CEO.

These Aspirational Lifestyles on an Absolute Line of Aspiration can be depicted diagrammatically as per figure 3.

FIGURE 3, SOCIAL CLASS AND ASPIRATIONAL LIFESTYLES

In a study conducted to understand status and aspirations of young working men across different socio economic segments in India, we found that men from different socio-economic segments aspired to significantly different lifestyles. The lifestyles depicted were anchored on levels of wealth broadly, and each aspirational lifestyle represented a kind of idealized picture of what that level of wealth would result in.

Each aspirational lifestyle was explained in terms of:

- The categories that belonged in that lifestyle;
- The environment / type of home that belonged;
- Profession, nature of income earned (steady vs. irregular, salaried vs. businessman).

The consumer was quite easily able to specify categories and brands that would 'fit' in each lifestyle.

MAPL and categories
Each Social Class is therefore associated with a set of categories. As an individual 'climbs' and rises from one social class to the next, he is likely to adopt and discard categories.

- He would discard categories which he believes do not reflect his current stature, which are below his Minimum Acceptable Lifestyle.
- He would adopt categories, which are at least in accordance with his current perceived stature.
- He would aspire to categories that are positioned at the tip of his own lifestyle/ value pyramid or his Maximum Expected Lifestyle.
- Once he has discarded categories he will not go back to them.

MAPL category markers
The question arises as to how these social class "changes" can be effectively measured. Are there any markers which signal a change of social class?

Of all categories, durables tended to form the most effective 'markers' for a rise from one social class to another. They are visible and display the family's level of prosperity and success to peers.

A study by Morgan Stanley, the global financing firm, conducted in 2009-10 shows that the primary driver for owning a four-wheeler in India is "Status" and, interestingly, "better suited to my occupation". This suggests that the type of automobile owned signals the individual's status to society and matches his own perceived status. The same study goes on to show that, when you examine the demand curve for passenger cars and two-wheelers by household income, there are distinct points of inflection (figure 4).

FIGURE 4, ALPHAWISE EVIDENCE SUGGESTS THE DEMAND FOR PASSENGER CARS INFLECTS WHEN HOUSEHOLD INCOME HITS RS 20-25K PER MONTH

These indicate points when the consumer switches from one social class to another. He therefore *discards* two wheelers as his primary family vehicle and *adopts* four-wheelers, which is what his new perceived status warrants. These inflections indicate changes in the individual's perceived social class.

Therefore the kind of automobile owned by a household appears to be a good marker for social class or shift in social class. As an individual rises from one social class to another in his self- perception, he is most likely to shift the vehicle he owns to signal his changed status.

Categories other than durables also show change with shifts in social class, though they may not be equally effective as markers for social class upgradation:

- In many FMCG categories, the movement from buying loose, unbranded, unpackaged products to packaged and branded products is a significant upgrade for those at the bottom of the pyramid. Thereafter, upgradation of categories is most visible in the case of products with high status connotations.
- Cigarettes, for example, are important to many segments as a signal of social class and identity. In India, the '*bidi*' is a rolled tobacco leaf and smoked by a large population below poverty line, who are not able to afford cigarettes. The upgrade into cigarettes symbolizes a big change into a different lifestyle- more respectable and more settled. The next upgrade point here is the regular smoking of king sized cigarettes, or a habit change in buying packs of cigarettes rather than single sticks.
- The pattern is also visible in the beauty category, where upgraded lifestyles lead to upgradation in the kind, quality and price of cosmetics used, or the kind of beauty salons frequented.
- Shopping behavior for basic foods and groceries in India is also linked with a consumer's self-definition and social class. In studies conducted to understand retail behavior in small towns in India, we have found lifestyle barriers to entering the modern trade outlets, with lower socio-economic class consumers preferring instead to shop at local grocery stores. A fundamental reason given for this was a perception that these stores were "not for me", or "for the rich" indicating that they considered such stores to be beyond their Line of Aspiration.

It is possible therefore to populate each Social Class and Aspirational Lifestyle with associated categories which "belong" to that Social Class and the corresponding Aspirational Lifestyle. Of all the categories considered, automobiles have emerged as the clearest "markers" of upgradation across social classes.

The MAPL brand construct
The following is a brand construct based on the MAPL perspective. The key elements of this construct are specified below:

1. *Each brand is associated with a specific social class:*
Just as categories can be associated with each Social Class and Aspirational Lifestyle, these are also associated with a set of brands.

An analysis of imagery for a number of different brands shows that consumers tend to slot brands into certain social classes. Typically, this perspective emerges in brand image research where the brand is described as a "middle class brand" or "rich and stylish" and so on. The consumer often has a very clear picture of the social class to which a brand belongs.

Consumers use multiple parameters by which to slot brands into a social class. The following are the most critical factors in the consumer placement of the brands in a particular social class:

- The categories with which the brand is most strongly associated:
    - Technology associated with the category, e.g. Apple's association with laptops and now the iPods, iPads, iPhones continue to keep the brand near the top end of the life systems; Samsung association with high end cellphones kept the brand's home system at a high level;
    - Price range of the category,- e.g. Rolls Royce is associated with the most expensive cars;
    - Style quotient of the category- e.g. Rolls is associated with royalty.
- The origin / heritage of the brand:
    - Heritage : the history and past performance of the brand;
    - Country of origin- there are different associations today with different countries – countries such as China are associated with cheaper products and therefore likely to bring down the brand's home system location. Countries such as Germany, Korea, and Japan enjoy high equity for technology and precision as well as aesthetics. In India, "Indian" places the brand at a middling lifestyle level.
- User profile:
    - Whom they see / perceive using the core products
- Stability:
    - Track record for consistent delivery

It is interesting that the perception of the social class that each brand belongs to does not vary much across socio-economic segments. What does vary is the relationship that the consumers from different socio economic segments have with the brand.

In most categories that act as strong social class upgrade markers, the consumer divides brands into three fundamental categories: brands which are "for me" "for those below my level" and "for those above my level". Not all brands seen as "above my level" are aspirational. Some are just too far above.

When a brand is slotted into a particular social class, the brand is aspirational to social classes below the one where it is slotted. We could term this the brand's *Sphere of Influence*. For all segments within the *Sphere of Influence*, the brand is likely to be *aspirational at best and respected at least*.

2.   Every social class has a set of Aspirational Brands
Every social class has a different set of aspirational brands, which inhabit the specific Aspirational Lifestyle for that social class.

Brands at the Aspirational Lifestyle stand for the kind of lifestyle that the consumer aspires for. In the category of motorcycles, for instance, the brand Hero Honda Splendor was aspirational for a large segment of lower middle class Indians who saw it as expressing the stability, reliability and easy lifestyle that they wanted for themselves. Hero Honda, the mother brand, also had high-end power bikes such as Karizma which further drove the perception of power and technology which drove the aspiration. The name "Honda" added an aura to the brand while the name "Hero", a familiar name associated with cycles, gave the brand a sense of closeness and accessibility.

Brands belonging to an immediately lower Aspirational Lifestyle continue to have value as the consumer upgrades, as these form the *minimum acceptable brands* that the consumer would like to interact with. These brands do not necessarily drop out of the basket of brands but stay on to provide a sense of identity and continuity.

In the example given earlier, Hero Honda Splendor was not an aspirational bike for executives who already had the stable smooth life projected by the brand, although it was aspirational for the social class immediately below theirs. However, the brand was one that they respected and were happy to be associated with.

Brands which belong to a higher Aspirational Lifestyle are likely to be admired by consumers but unlikely to be seriously considered by them. In research amongst two-wheeler owners, there are two questions that were often asked of respondents: "what bike do you dream of owning" and "what brands do you have in your consideration set." The answers to these two questions are invariably different. The brand consumer's "dream" of owning is usually expensive, and fit in a lifestyle far above their aspiration.

Price definitely has a strong role to play in maintaining this 'distance'. So what happens when such brands 'stoop' to offer products at the level of segment's Limit of Aspiration, two things happen:

*   Delight creation for the consumer;
*   The 'aura' around the brand starts to dim a little.

3.   Each brand would have a Limit of Credibility.
The *Limit of Credibility* is the maximum social class which the consumer can associate with the brand, beyond which the consumer would find the proposition incredible. The *Limit of Credibility* prevents any further upward extensions given the brand's existing equity.

A brand's Limit of Credibility depends on the brand's *upward elasticity*. Highly credible brands tend to be given more 'play' by consumers who trust the brand and therefore are willing to keep their minds open to new ventures by the brand. Figure 5 depicts the MAPL Brand Construct diagrammatically.

FIGURE 5, MAPL CONSTRUCT FOR BRANDS
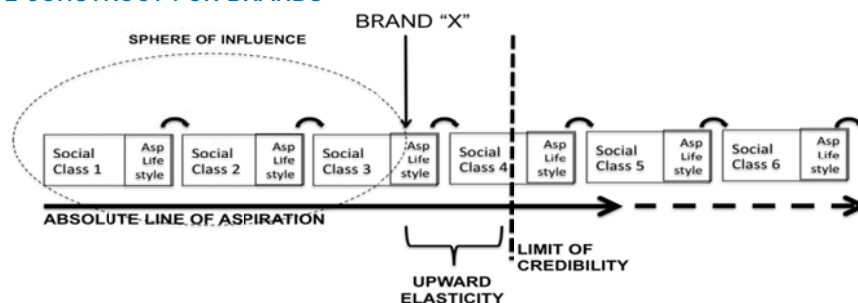
In this diagram, Brand "X" is associated with the Aspirational Lifestyle of Social Class 3. The *Sphere of Influence* of Brand X therefore extends to all social classes below the social class with which it is associated. Consumers, however, are willing to accept launches from the brand in categories associated with the immediate next social class. This represents the extent of the brand's *Upward Elasticity*. But this level forms the brand's *Limit of Credibility*. Consumers would find launches in categories associated with higher social classes than this to be incredible and unsuitable for the brand.

IMPLICATIONS OF THE MAPL BRAND CONSTRUCT FOR BRAND ARCHITECTURE

The Brand Construct outlined above indicates that a brand is aspirational for all social classes below that to which the brand is associated.

Therefore it follows that for launches in categories within the brand's *Sphere of Influence*, a dominant mother brand is likely to enhance the brand's appeal and aspiration quotient.

For brand extensions / launches in categories belonging in lifestyles *above the brand's Sphere of Influence*, sub branding seems to be the most appropriate approach. (See figure 6.)

FIGURE 6
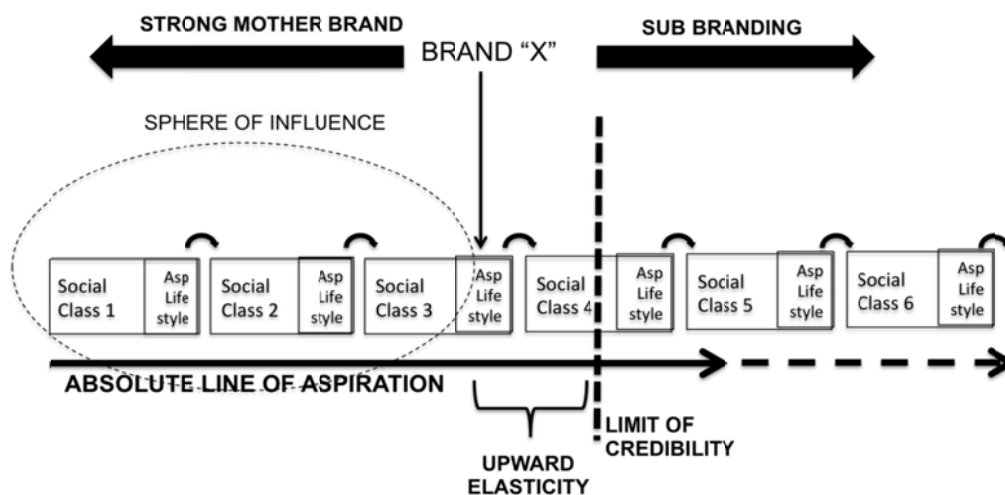
In India, brands such as Bajaj, Tata and Godrej stand for stability, respectability and trust – sound upper middle class values.

- Tata has presence in a range of categories from trucks to steel to watches and jewelry, consulting services, IT and financial services but core imagery comes from steel and trucks – big, heavy and reliable.
- Similarly, the Bajaj brand name covers categories ranging from two- and three-wheelers to small electrical appliances and FMCG products such as hair oils. But the brands core imagery derives from the ubiquitous "Bajaj Scooter" – a respectable family vehicle- cheap and easy to maintain. For a very long time, the name "Bajaj" signalled "affordable" and "reliable".
- Godrej, a leading Indian brand of consumer durables, has a strong association with locks and cupboards which drive the values of "sturdy and safe."

Tata, Bajaj and Godrej are aspirational for consumers up to a certain socio-economic class but find little traction with classes which buy super premium products. The consumer seems to have slotted these brands within a certain paradigm or lifestyle and has trouble in perceiving the brands in a "higher" frame of reference or lifestyle. They have faced a problem of "upward stretchability".

All three brands have had to use sub brands to ensure a presence at a higher social class than that in which they are slotted.

- With the launch of Pulsar, the Bajaj image started to get replaced by the "Pulsar" image - young, stylish, upwardly mobile and technologically savvy. The mother brand stood for values at odds with those that Pulsar projected, but which the company wished to embrace.
- In the refrigerator category, Godrej launched the Eon, the high-end range of refrigerators. It is hoped that values of style and sophistication from the Eon range would rub onto the mother brand.

- When Tata launched a premium range of gold jewellery, the Tata name was kept in the background. The range was called "Tanishq" and today has all the values of premiumness, style and sophistication which the mother brand appears to lack. However keeping the Tata name ("From the House of Tata") in the background helps to maintain a sense of trust and solidity for the brand.

What is interesting to observe is the impact that these sub brand successes have had on mother brand imagery. In the case of Bajaj, there was a period when there was a dichotomy in the way consumers perceived the mother brand post the launch of Pulsar. In a study conducted to understand the brand image of Bajaj a few years after launch of Pulsar, the consumer's confusion came through clearly. On one hand there was the Pulsar imagery, which was young, sophisticated and upper class while on the other hand there was the Bajaj imagery which was, at that time, old fashioned and definitely associated with a less affluent lifestyle. Today however, the image is more integrated and Bajaj, the mother brand, seems to have absorbed a sense of dynamism and technology from Pulsar.

In the case of Tata and Tanishq, while the Tata name provides a sense of trust and credibility to the brand Tanishq, the mother brand is expected to gain a sense of premiumness by being associated with a premium category.

Brand Buoyancy and Drag
The concepts born out of this analysis are those of *Brand Buoyancy* and *Brand Drag*.

Brand Buoyancy
If a brand is able through sub branding or any other strategy, to create strong associations with categories above the Lifestyle with which it is currently associated, it is likely that the brand will gradually be buoyed upward and the entire overall profile of the brand will be raised.

When the Korean brands LG and Samsung entered the Indian durables market, they were initially received with suspicion and lacked connect with the Indian consumer. Over a period the two brands worked to create connect, and also delight, the consumers across socio economic strata with their designs, features and competitive pricing.

The case of LG and Samsung in India is an interesting case which illustrates this point.

LG and Samsung entered India at roughly the same time just over a decade ago, with a range of white and brown goods. At the time they entered, they were seen as Korean companies, therefore international and high tech. Research in the first few years of launch showed that there was virtually no difference in the way the two brands were perceived.

LG and Samsung, however, had differences in their marketing approach. LG focused more on household durables, and on building connect with housewives. Also in every category in which they operated, they would pick up a rational benefit and build their communication around this benefit. Also they did not follow a policy of premium pricing, instead keeping their prices competitive at all levels.

Samsung, on the other hand, focused more on their technology range, starting with televisions. Their communication tended to be technology led and focused on image building along these lines. They also projected their range of cellular phones and now with the Galaxy series appears to be firmly positioned on technology.

While LG and Samsung started on an equal footing in terms of image, more recently it appears that Samsung has an edge in terms of image of technology and overall quality. Samsung's cross category advertising especially for high-end cellular phones appears to have given the brand an edge. Samsung, through an association with higher end categories pegged at a higher social class, has slowly managed to "buoy" the image upwards, differentiating it from LG.

Innovations and technological breakthroughs are likely to raise the profile of the brand and buoy the brand from the current social class with which it is associated to the next one. (See figure 7.)

FIGURE 7, BRAND BUOYANCE
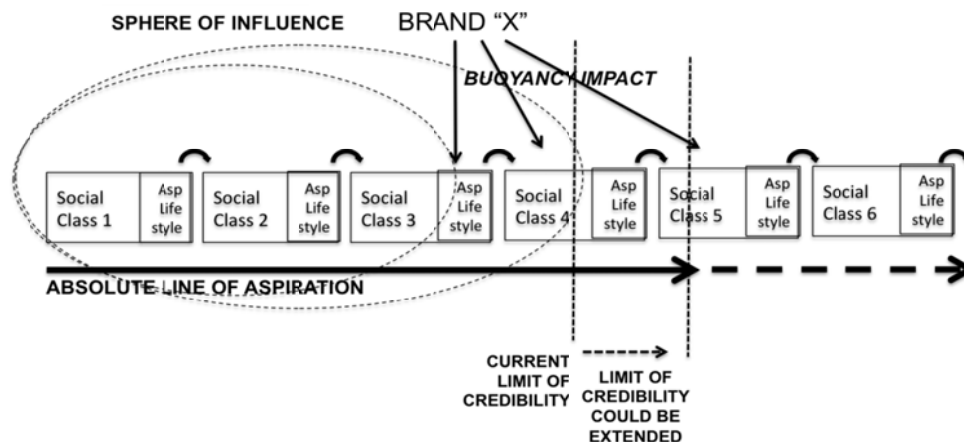
Just as individuals constantly try to grow and improve their lifestyles, there is a basic need to perceive the brands they buy into as similarly evolving and showing an upward mobility. Across studies with brand loyalists, it has become clear that consumers today feel a need to see the brands they associate with as innovative, dynamic and growing.

Brand Drag

Brand Drag refers to a situation where the brand association comes down to a lower social class than where it started.

FIGURE 8, BRAND DRAG
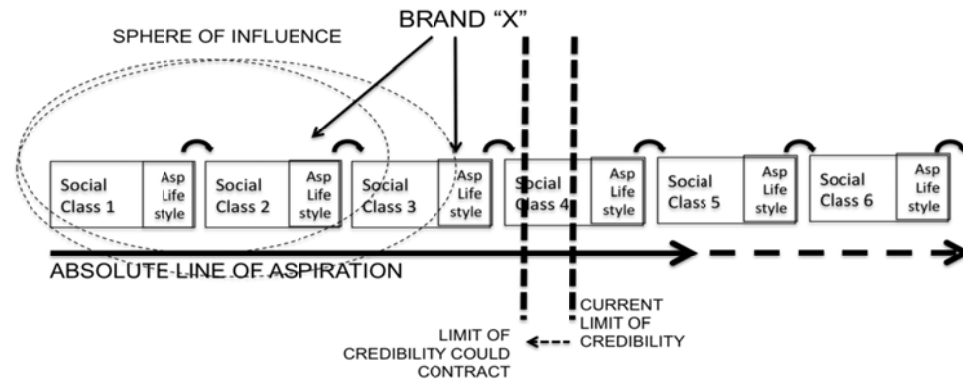
This could happen for two reasons:

- *Stagnation:* In the lexicon of the Indian consumer, modernity and "latest" are linked with higher order lifestyles, while "old" or "outdated" are linked with lower order lifestyles. Therefore it is important for a brand to stay innovative and be seen as progressing for it not to slip back into a lower "lifestyle". A stagnant brand would slowly lose its stature and fall back in terms of Absolute Aspiration levels.

  The brand therefore needs to "run to stay in the same place". This appears to be true for not just durables but across categories. In the case of durables and product categories based on technology- e.g. skin and hair care- technology and innovativeness are important to create a sense of brand movement. Across categories new launches, variety and range of options, small innovations in packaging, etc. are ways in which to keep a sense of brand movement and evolution.

- *Association with lower social class categories*: Similarly, strong success in/ association with products belonging to a lower lifestyle is likely to weight down the brand and act as a downward drag. Ultimately, it would lower the brand's profile and create its association with a lower lifestyle.

  In the case of brands which are present in multiple categories, associated with a range of social classes, the issue becomes finding the brand's centre of gravity. Which category should act as the brand's spearhead category, which should the brand project? Would association with a particular product "drag" the equity down?

"Raymond" is a leading Indian brand of garments which is seen as premium and associated with a rich sophisticated lifestyle. When the company launched the brand "Maker" targeted at small town men, they were careful to keep the Raymond brand name out of the Maker branding. While adding the Raymond name to the brand would certainly added to its aura for the Maker buyer, this could have eventually acted as a Drag on the Raymond equity, possibly lowering the brand's aspiration level.

Brands and a sense of progress: Variants and sub brands

At any point in time, most consumers in a social class are *moving towards* the respective Aspirational Lifestyle, but *have not quite reached* there. It is important for individuals to feel a sense of movement towards their goals and this is best done through small upgradations in their products used.

The automobile category is divided into segments of cars, based on their engine capacity, design and price range. As we have seen earlier, automobiles owned are strong markers of an individual/ family's perceived social class. Typically, the consumer enters a car segment at the lower end and, over a period, upgrades to the higher end brand / option within the same segment. This provides him with a sense of movement and progress. A bigger change happens when he upgrades to the next segment, when he again starts at the bottom of the new segment.

The same pattern is visible in other durables as well. In the refrigerator category, Indian consumers have the option of buying Single Door Non Frost Free range of refrigerators available at low cost. The Frost-free range of refrigerators represents a significantly higher investment.

- The consumer in SEC C would typically start with small sized single door refrigerators, and move to the higher end of this category with larger size, better looks and extra value added features.
- The major upgrade point is when they shift categories to the double door frost-free refrigerators. Here again, they would start with the smaller sizes and over a period upgrade to larger sized frost-free refrigerators until the next major upgrade point, to "side-by-side" refrigerators.

Therefore it seems to be important for consumers to have upgrade points within a segment to provide them with a sense of movement and growth. This is a strong logic for a brand to offer multiple options and price points not very far from each other to provide this sense of upgradation and pride in progress.

Variants and sub brands can be used to create a sense of movement for the consumer as well as for the brand. Having options with value additions for which the consumer can pay a relatively small premium provides a sense of well-being and upgradation within a social class. This also has a positive impact on the brand, which is seen as innovating and upgrading thereby enhancing its status and aspirational value.

This does not mean that the consumer would always follow the upgrade process from the lower to the higher variant. Sometimes, the fact that they are able to identify with a higher priced/ more sophisticated variant while staying with the lower priced variant of a brand seems to be enough to feel a sense of upgradation.

A successful brand, which appears to have benefited from this strategy, is Bajaj Pulsar. The brand was launched a decade ago with two variants- the 180cc and the 150 cc. While the 180cc was clearly aspirational, it was the 150cc version that sold more. There was a sense of pride in being a part of the Pulsar family. When Pulsar launched the 220 cc variant, the pride in ownership of the brand increased amongst those who owned other variants of the brand.

IMPLICATIONS OF THE MAPL CONSTRUCT FOR BRAND POSITIONING

Every inflection point where a consumer upgrades to the next social class is potentially a slot for the introduction of a brand/ variant/ sub brand. If we consider the structure suggested by the MAPL theory, each social class has three types of consumers:

- *Strugglers* who are close to the Minimum Acceptable Lifestyle for their social class, and looking to rise;
- *Strivers / Achievers* who form the essential middle class of the segment- are growing steadily, have not yet arrived at the pinnacle they are striving towards, but are stable and looking for a sense of progress, movement (the largest segment);
- *Affluent* who have achieved the pinnacle, feel differentiated, looking for status symbols, benchmarking downwards.

This implies that theoretically, there are potentially three positioning slots for brands in any social class:

- Economy brands that help manage the period of struggle;
- Striver/ achiever brands that provide a sense of upward movement/ sense of stability;
- Status brands that differentiate.

The MAPL Construct envisages multiple positioning slots within any given social class, at any point in the overall pyramid. We examined some brand successes and failures to understand how the MAPL theory applied in each case.

Tata Nano: The People's Car

The Tata Nano was launched as the "people's car". When the car was conceptualized, it was expected that an entire new segment of non- car owning consumers would now be able to afford a four-wheeler. There were worries about extra traffic congestion as the population of car owners in the country was expected to grow in a fairly spectacular manner. Two years after launch the predictions somehow never came true. In contrast brands in the same segment with a higher price did much better in terms of sales.

Everyone had a theory as to why the Tata Nano failed- poor distribution, production problems, reports of Nanos catching fire, causing bad word of mouth, and so on. But underlying all this was a fundamental issue: the Indian consumers saw the Nano as a "poor man's car", and did not therefore want to buy it. Ratan Tata, Chairman and Managing Director of the Tata Group, admitted in a press interview in early 2012 that this was indeed one of the main reasons for the brand's poor showing. "We got our positioning wrong."

How does a car priced at Rs.1, 70,000 get perceived as a "poor man's car" by an audience which has not so far been able to afford one at all? If only upper middle class plus segments purchase cars in India, the phrase sounds like a contradiction.

However it makes sense if we view this from the MAPL perspective. A two-wheeler owner makes an upgradation from one social class to another in entering the car category and is acutely conscious that, after all these years of struggle to reach the next level, he will have to start again at the bottom of the next pyramid. Only, he does not want to be reminded about this.

The "people's car" has been interpreted by the Indian public as an attempt to reach down to a lower class with a discounted price. The pride and sense of status associated with having reached the car owner's social class is absent in the values projected for Nano.

The key learning here is that for brands there is a need to project a strong sense of aspiration even for – perhaps especially for–brands positioned at the lowest end of a category. Nano could have appropriated values, which projected the lifestyle and ethos of the car owner, which would have been aspirational to the target segment.

Gold Flake Cigarettes

In the cigarette category, there are many highly successful brands from Imperial Tobacco Ltd. (ITC). The most successful of these is Gold Flake. Gold Flake figures in the consideration set of a cross section of consumers.

Gold Flake is available in both King Sized and Regular sized options. All Gold Flake brands share a similar imagery of being stable, respectable and confident. This is highly aspirational to the lower class of wage earners, workers and self-employed blue-collar workers who long for stability, security and respectability. At the same time, the brand is highly reassuring to those who are stable and conventional as it is a symbol of having arrived onto this platform of stability. Gold Flake is both the symbol of upward mobility and stability, and represents a steady upward trajectory. Gold Flake smokers uniformly across social classes see themselves as respectable, stable and successful.

This brand therefore belongs in the Aspirational Lifestyle of one social class, and is an Acceptable Level of brand for the next social class. For the lower class, the brand has positioned Regular sized cigarettes, i.e. Gold Flake Filter/ Gold Flake Premium. Gold Flake Kings is positioned to the immediately higher social class, so that they may upgrade within the Gold Flake family. It is also apparent that the reason that the Gold Flake regular sized cigarettes are aspirational is the presence of a successful and highly visible Kings variant that keeps the aspiration alive.

The brand therefore provides status to the lower segment smoker, and a sense of pride and identity in the immediately higher social class.

The learning here is that successful brands are also those which are able to straddle two segments and offer significant value to the consumer in both segments. The brand was therefore slotted as Status Brand in one social class and as an Achiever/Identity brand in another.

Bajaj Pulsar: Definitely Male, definitely a winner

When the motorcycle Pulsar was launched a decade ago, the brand lay in the cusp of the power bike and the commuter bike segments. There was always the danger that the bike would end in no man's land- neither a real power bike nor a commuter bike. However the brand was launched on the platform of "Definitely Male" and took a strong stance as a powerful, good looking masculine bike for the individual rider. The bike incorporated the DTSi technology, a Bajaj breakthrough which promised better mileage without compromise on power.

Pulsar became one of the biggest successes from the Bajaj stable. It caught the imagination of a generation of young adults who had left their carefree collegian years behind, but not their passion for biking. The 150 cc version was a great success and the 180cc version provided the aspiration. The 220 cc version was launched a few years later, which is today a benchmark brand for the segment.

The Pulsar represented a cusp between the power and the commuter bike segments, as it was able to combine the aspiration of the power segment with the pragmatism of the executive segment. But at no time did the brand let the consumer feel in any way that he was buying for reasons other than passion, keeping the communication always premium, always stylish.

Pulsar was slotted as a Status brand to aspire to, and the aspirational quality was being kept alive by the company through new variants launched in higher end segments.

This analysis suggests the following:

- Every brand is in reality an Aspirational Brand. Even a brand aimed at the lowest social rungs needs to be positioned aiming to provide a sense of value and aspiration for the target segment.
- There are, in reality, only two slots for positioning for a brand in any social class: the Status brand for that segment, and the Striver/ Achiever brand for that social class.
  - The Status Brand differentiates and reflects a sense of happiness and self fulfillment at having reached a pinnacle.
  - The Striver/ Achiever brand keeps the climber's pride and sense of identity intact as he climbs towards his immediate aspirations.
- The Status Brand becomes the Economy Brand in the next social class.
- For every brand, it is important to understand the segment to which the brand would be aspirational, and to project the appropriate values associated with the relevant Aspirational Lifestyle.
- Brands positioned at inflection points which signal movement from one category or one lifestyle to another need to be positioned from the perspective of those for whom the brand is aspirational. Consumers like to "rise" to a brand and feel the sense of upgradation.

The MAPL theory suggests therefore that:

- The first step in positioning a brand is to understand clearly the ethos or Aspirational Lifestyle that the brand would stand for. In communication for the brand, the values projected for the brand need to reflect these aspirational values.
- Varianting is a way to ensure that the consumer has "easy steps" towards achieving that goal. Hence, while a consumer may aspire to the Pulsar 220, by buying a Pulsar 180 or even 150, he feels reassured that he is moving towards the aspirational lifestyle projected by Brand Pulsar.

IN CONCLUSION

The MAPL Construct is therefore able to provide a framework, within which to take decisions on brand positioning, and brand architecture and extension possibilities. This is based on a deeper and finer understanding of consumer aspiration and their upward climb to achieve short and long term goals.

In comparison with conventional perspectives using absolute income to understand consuming populations, this perspective shows that the scale of opportunity and slots for positioning brands and categories is much larger and embedded right across the spectrum of consumers.

This theory has validity not just for individual consumers but also for societies as a whole. As an entire society becomes more affluent, it adopts categories and brands that reflect its current stature and aspirations.

Across countries, the *Aspirational Lifestyles* would be different depending on affluence levels of the respective economies. For instance, Aspirational Lifestyle 1 in a country such as Sweden may start at a much higher level in terms of categories associated and absolute wealth levels compared with countries such as India or China.

Also, the number of Aspirational Lifestyles and the highest Aspirational Lifestyle that an individual can aspire for would also vary by economy. Countries such as India, Indonesia, China, etc. are likely to have a very large number of Aspirational Lifestyles or upgrade points. The sheer range of wealth levels ensures this, as the wealthiest residents in these countries figure amongst the richest in the world, while a large proportion of the population falls below the poverty line.

In a country like India and in fact across the BRIC nations, the scale and range of income indicates that there are multiple lifestyles and multiple upgrade points across the spectrum, and not just in certain segments of the population measured on absolute income levels. There are indeed slots for "many different suns".

While this has been a preliminary analysis to build the construct, it needs to be validated using a larger number of cases and observations across categories to build a robust model, which can guide branding and positioning decisions.

"There's so many different worlds
So many different suns
And we have just one world
But we live in different ones"   - Dire Straits, "Brothers in Arms"

FOOTNOTE
1.   This was the subject of the paper presented at the ESOMAR Qualitative Conference, November 2010.

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