

**A STUDY OF CUSTOMER BASED BRAND EQUITY FOR THE
PUBLIC SECTOR OIL MARKETING COMPANIES WITH
SPECIAL REFERENCE TO THE CITY OF INDORE**

By

REKHA ATTRI

COLLEGE OF MANAGEMENT AND ECONOMIC STUDIES

SUBMITTED

IN PARTIAL FULFILMENT OF THE REQUIREMENT

OF THE DEGREE OF

DOCTOR OF PHILOSOPHY

TO



UNIVERSITY OF PETROLEUM AND ENERGY STUDIES

DEHRADUN

Guided by:

Dr. Ashish M. Urkude

**Professor, CMES
UPES, Dehradun**

Guided By:

Dr. Manvinder S. Pahwa

**Associate Professor, CMES
UPES, Dehradun**

January 2012

DECLARATION

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, contains no material previously published or written by another person nor material which has been accepted for the award of any other degree or diploma of the university or other institute of higher learning, except where due acknowledgement has been made in the text, references.

Rekha Attri

ACKNOWLEDGEMENT

With the deepest gratitude I wish to thank every person who has come into my life and inspired, touched and illuminated me through their presence and have been instrumental in the success of this research project. Special thanks to my guides Dr. Ashish Manohar Urkude and Dr. Manvinder Singh Pahwa for their wisdom and guidelines which helped me constantly question and improve my research work. I extend my deepest gratitude for their incredible support, deep insight and keeping me focused in my research work. The constructive criticism, suggestions and constant encouragement of my guides have gone a long way in helping me complete my thesis.

I am thankful to Dr. Vikas Prakash and Dr. D.C. Patra whose continuous unconditional support was quintessential in all the progress made in my research work. Their support as external guides from the industry kept me abreast with the recent happenings in the area of my research work.

I am grateful for the inspiration and wisdom of Dr. Deepak Kaul, the director of Core Business School and the deep conviction expressed by Mr. Sunil Chaturvedi, the dean of the business school in my research work. Words can never convey how much I appreciate their support in bringing out the best in me.

This report would not have been possible without the essential and gracious support of my dear students who assisted me in the best of their capability to conduct the survey for the research. I thank all the dealers of the retail outlets who shared their valuable knowledge during the interview sessions. I appreciate the time taken out by hundreds of respondents for their support.

I feel really blessed with having good friends, acquaintances and relatives who encouraged, educated, inspired and generally kept me going with renewed enthusiasm whenever I felt that things were not going the way I desired. A big thank you to Mr. Manish Mittal, Mr. Dheeraj Dalal, Ms. Muskaan Mulchandani, Mr. Prayas Tarani, Mr. Meetesh Jha, Mr. Sudeep Saxena, Mr. Abhishek Gupta, Mr. Naveen Mahadik, Ms. Palvinder Kaur and Mr. Lalit Tiwari who either directly or indirectly extended their support and empathized with me during my course of this research project.

A deep sense of gratitude and indebtedness is for my father-in-law, Mr. B.D. Attri, whose constant enthusiasm and motivation continues to motivate me to achieve excellence. A heart felt thank you to my mother-in law, Mrs. Saubhagya Attri and my brother in law Mr. Arvind Attri who always supported me in pursuing higher studies and encouraged me in all my academic pursuits. I find myself incompetent to find suitable words while offering thanks along with profound regards to my parents Mr. C.B. Pathak and Mrs. Pushpa Pathak whose deep rooted affection, immense sacrifice and perennial blessings provoked me to carry out all the hard work required in making them proud of me. I appreciate the promptness of my brother, Mr. Vinay Pathak and his family, Anamika and Aditya for helping me out in every possible way.

Nothing compares to the undying faith, valuable support, infallible cooperation and constant motivation extended by my husband Mr. C.M. Attri whenever it was needed the most. Ankit, my child, your patience, support and achievements in academics with my minimal guidance was the wind beneath my wings which helped me accomplish the goal.

(Rekha Attri)

TABLE OF CONTENTS

Serial No.	Content	Page No.
	Thesis Completion Certificate	i
	Declaration by the Researcher	ii
	Acknowledgement	iii
	List of Tables	x
	List of Exhibits	xix
	List of Abbreviations	xx
1.0	CHAPTER 1: Introduction	1-16
1.1	Brand and Brand Equity	1
1.2	Building and Managing Brand Equity	2
1.3	Metrics Associated with Branding	5
	1.3.1 Knowledge Metrics	5
	1.3.2 Preference Metrics	5
	1.3.3 Financial Metrics	5
1.4	Theoretical Framework	6
1.5	Motivation/Need	9
1.6	Contribution of Research	14
1.7	Plan of the Thesis	15
2.0	CHAPTER 2: Review of Literature	17-66
2.1	Power of Brand Differentiation	18
2.2	PCDL Model for Building Brands	20
2.3	Brand Cultures	27

Serial No.	Content	Page No.
2.3.1	Reputation Value: Shaping Perceived Product Quality	29
2.3.2	Relationship Value: Shaping Relationship Perceptions	29
2.3.3	Experiential Value: Shaping Consumer Experiences	30
2.3.4	Symbolic Value: Expressing Value and Identities	30
2.4	Brand Building in Unconventional Way	31
2.5	Measurement and Management of Brand Value	32
2.6	Additive and Inclusive Approaches to Measuring Brand Equity	32
2.7	Building Customer Based Brand Equity (CBBE)	33
2.7.1	Customer Based Brand Equity Pyramid	34
	2.7.1.1 Brand Identity	35
	2.7.1.2 Brand Meaning	36
	2.7.1.3 Brand Response	40
	2.7.1.4 Brand Resonance	42
2.8	Research on CBBE Parameters	44
2.9	Brand Relationship Management (BRM)	57
2.10	18 Brand Astras	59
2.11	New Role of Brand Manager	60
2.12	From a Commodity to a Brand: Tata Tiscon	62
2.13	Why Do Brands Fail?	62
2.14	MDRA Research on Branded Petrol	64
3.0	CHAPTER 3: Research Methodology	67-82
3.1	Objectives of the Study	67

Serial No.	Content	Page No.
3.2	Hypothesis	68
3.3	Research Methodology	70
3.3.1	Scope of Research	70
3.3.2	Calculation of Sample Size	74
3.3.3	Methodology to Measure Research Constructs	75
3.3.4	Nature of Study	80
4.0	CHAPTER 4: Overview of Brand Building Activities of OMCs in India	83-99
4.1	Brand Building Efforts by Indian Oil Corporation Ltd. (IOCL)	84
4.1.1	Retail Outlets (IOCL)	84
4.1.2	Loyalty Cards (IOCL)	85
4.1.3	E-Initiatives (IOCL)	86
4.1.4	Convenience Stores (IOCL)	87
4.1.5	Promotion Campaigns (IOCL)	87
4.2	Brand Building Efforts by Bharat Petroleum Corporation Ltd. (BPCL)	88
4.2.1	Loyalty Cards (BPCL)	89
4.2.2	E-Initiatives (BPCL)	90
4.2.3	Promotion Campaigns (BPCL)	91
4.2.4	Convenience Stores (BPCL)	92
4.3	Brand Building Efforts by Hindustan Petroleum Corporation Ltd. (HPCL)	93
4.3.1	Loyalty Cards (HPCL)	93
4.3.2	Retail Outlet Branding (HPCL)	95
4.3.3	Dealer Connect (HPCL)	95

Serial No.	Content	Page No.
4.3.4	Promotion Campaigns (HPCL)	96
4.4	Snapshot of Brand Building Activities by Public Sector Oil Marketing Companies	98
5.0	CHAPTER 5: Overview of Brand Building Activities of International Oil Marketing Companies	100-120
5.1	Brand Building activities of Exxon Mobil	101
5.2	Brand Building Activities of Royal Dutch Shell	103
5.3	Brand Building Activities of British Petroleum	106
5.4	Brand Building Activities of Chevron	109
5.5	Brand Building Activities of ConocoPhillips	111
5.6	Evolution of International Petroleum Retailing	112
5.6.1	The Industry: 1960-1969	112
5.6.2	Tie-Ins	113
5.6.3	Credit Expansion	114
5.6.4	Promoting and Marketing	115
5.6.5	Investigations and Hearings	116
6.0	CHAPTER 6: Comparison of Brand Building Activities of PSU OMCs in India with International OMCs	121-132
6.1	Branded Petrol and Diesel	121
6.2	Loyalty Cards	125
6.3	Promotion Campaigns	128
7.0	CHAPTER 7: Analysis of Data and Data Interpretation	133-196
7.1	Test of Validity & Reliability	135

Serial No.	Content	Page No.
7.2	Brand Awareness of Oil Marketing Companies	137
7.3	Perceived Brand Quality of Petrol Marketed by Public Sector Oil Marketing Companies	152
7.4	Brand Association of the Customers with the Public Sector Oil Marketing Companies	161
7.5	Brand Loyalty Exhibited for Public Sector Oil Marketing Companies	186
8.0	CHAPTER 8: Conclusion & Recommendations	197-226
8.1	Conclusion	197
8.2	Recommendations	216
	8.2.1 Improve the Brand Awareness Level	217
	8.2.2 Reinforce Superior Brand Quality Image	220
	8.2.3 Establish Customer Connect with Key brand Values	222
	8.2.4 Build Loyalty through Customer Relationship Management	223
8.3	Limitations of the Research	226
8.4	Scope for Future Research	226
9.0	SUMMARY	227-246

CHAPTER-1

INTRODUCTION

Content	Page No.
1.1 Brand and Brand Equity	1
1.2 Building and Managing Brand Equity	2
1.3 Metrics Associated with Branding	5
1.4 Theoretical Framework	6
1.5 Motivation/Need	9
1.6 Contribution of Research	14
1.7 Plan of Thesis	15

CHAPTER 1

INTRODUCTION

1.1 BRAND & BRAND EQUITY

Brand signifies a name or a symbol which helps in identification of the product by an individual. Branding decisions take the centre stage when developing new products as strong brands add significant value when they are well recognized and elicit favourable associations in the mind of the consumer which ultimately results in high brand equity.

As per Ukpebor and Priscillia (2008), brand equity is an asset of the company which is intangible and depends on customer brand association resulting to brand loyalty. Managers view brand equity from following perspectives:

- **Financial** – Brand Managers generally measure brand equity by assessing the price superiority or premium of the brand over a generic product. If consumers agree to pay more for a branded article over the same unbranded article, then the premium provides information about the value of the brand. Marketing communication and promotional expenses are generally taken into consideration under the financial perspective of measuring brand equity.
- **Brand extensions** – Brand extensions in the related product categories become easy when a particular brand is successful in the market. The advertising expenses are reduced phenomenally as there already exists an adequate amount of brand awareness and thus the risk of the consumers is lowered. The value of flagship brand gets enhanced through appropriate brand extensions. However, it is quite difficult to quantify the value of brand extensions as compared to quantifying the direct financial results of brand equity.

- **Consumer-based** – Consumers’ experiences with the brand help build and associate positive feelings and attitudes towards the brand. This implies that the marketers need to work towards delighting the customers with their products. This is perhaps the reason why marketers favour offering trial samples to the customers as direct and instant feedback can be achieved and sometimes proves to be more effective than advertising.

Following benefits accrue as a result of strong brand equity:

- A predictable income stream gets facilitated due to high brand equity.
- Cash flow increases as the market share grows which in effect, reduces the marketing communications costs and assists in premium pricing.
- Brand equity is an asset that can be either sold or leased.

However, it is not guaranteed that brand equity would always be positive in value. When bad reputation gets linked to a brand due to either external or internal reasons, it results in negative brand equity.

1.2 BUILDING & MANAGING BRAND EQUITY

Farquhar Peter H. (1989), in his paper on managing Brand Equity, emphasised on the following three stages assist in building strong brands:

1. **Introduction** – The brand introduction stage involves introducing a quality product so that a strong platform can be built from which future products either in form of line extension or in form of brand extensions could be launched. It is essential that customers have positive evaluations of the brand in this stage.

2. **Elaboration** – This stage involves activities that help the customer in remembering the brand and hence go for repeat usage. This stage aims at achieving positive evaluations of the brand by the customer.

3. **Fortification** – This stage of building brand equity involves reinforcing the brand’s place in the consumer’s mind and developing a special relationship with the consumer. Brand extensions in this stage help fortifying the brand and thus enhance the strength of the brand in the customer’s mind.

According to Brad Van Auken, an expert in brand management and marketing, a brand manager needs to measure the performance of the brands handled on a regular basis. The items normally measured by brand managers include:

- Measuring unaided brand awareness in a specified product category in which the brand competes.
- (TOMA) Top-of-mind brand awareness which aids in understanding the position occupied by the brand in the customers' minds
- Perceived brand value as against the benefits sought
- Expressed loyalty towards the brand
- The points of differentiation that makes the brand unique
- Price sensitivity for the brand which is a measure of brand strength
- Brand vitality which measures the momentum of the brand in the market
- Perceived Quality of the Brand
- Perceived Value of the Brand
- Brand accessibility perceptions
- Emotional connections with the brand
- The alignment of the brand values with those perceived by the customers
- Brand distribution
- Market share of the Brand
- Sales and Profitability of the Brand

As a brand manager, an access to these brand metrics helps in actively managing the brands to increase their strength and performance.

In the present business scenario, brands assist in enhancing the economic value of the corporation. They offer the capacity to add value which is far beyond and unmatched by any of the assets which once enjoyed honour. Brands are the basis of consumer relationship and are thus the most valuable

assets that a business can possess. In this competitive environment, product commonality is a major headache for marketers who are always faced with a challenge of ways of achieving differentiation which is valued by the customers. Brands are thus the new business warriors and wealth generators of the twenty-first century. They connect corporations with customers. As a result, brand management has been rightly recognised as a vital ingredient for success in corporate strategy.

Since the term “brand equity” emerged in the 1980s, there has been a growing interest in the subject among marketing academicians and practitioners (Cobb-Walgren, et al., 1995). Based on the value of brand equity, Aaker (1991) defined it as a set of assets (and liabilities) linked to a brand's name and symbol that add to (or subtract from) the value provided by a product or service to a firm or customers. Advocates of brand equity contend that for a brand to have value, it must be valued by the customer. If the brand has no meaning to the customer, none of the other definitions of brand is meaningful (Cobb-Walgren et al., 1995; Keller, 1993).

Brand equity, which measures the difference in consumer preference when he chooses a branded product over an unbranded product having almost same level of product features, has gained a lot of interest amongst the researchers in recent years (Yoo and Donthu, 2001). Marketers view this incremental utility or positive marketing outcome from both customer and firm based perspectives. The consumer based perspectives focuses on “customer mind set” and is explained with such constructs as awareness, associations, loyalty etc. (Keller & Lehmann, 2001) while the firm based perspective uses “product-market outcomes” such as price premium, market share, relative price etc. (Ailawadi, Lehmann & Neslin, 2002).

Over the years different sources and levels of knowledge such as awareness, association with attributes, feelings, attitudes and experiences get linked to a brand and its understanding by the consumer. A study to understand the consumer brand knowledge defined in terms of the personal meaning about a

brand stored in consumer memory, that is, all descriptive and evaluative brand-related information yields valuable insights into customer based brand equity.

1.3 METRICS ASSOCIATED WITH BRANDING

According to Roll Martin (2009), brand metrics generally fall into three categories: Knowledge metrics, Performance metrics and Perception metrics. The manner in which the brand building activities influence the overall business results are covered under Performance metrics. It ranges from price premium to loyalty and ultimately to the lifetime value of a customer. Relevance of the brand and its awareness and consideration over the competitor brands are covered under the dimensions of Knowledge and Perception metrics. These metrics help in assessing effectiveness of brand-building activities, which are associated, although less directly, to overall business performance.

- 1.3.1 **Knowledge Metrics:** This is linked with the customer's knowledge about the brand in terms of brand recognition, aided, unaided and top of mind recall. The functional and emotional associations of a brand by the customers are the key drivers of assessing brand equity. Brands should have high awareness and favourable brand association by the customers (Roll, 2009).
- 1.3.2 **Preference Metrics:** This metrics measures the competitive position of the brand and how it manages to differentiate from the competing brands. Customers transit through various stages of preference toward the brand, ranging from mere awareness to interest creation to desire of owning the brand and finally to strong loyalty which leads to recurrent revenues from the customer base (Roll, 2009).
- 1.3.3 **Financial Metrics:** This metrics measures a brand's financial value through the various parameters of market share, price premium a brand commands, the revenue generation capabilities of a brand, the transaction value, the lifetime value of a brand and the rate at which

brands sustains growth. Such measures allow the company to financially evaluate the brand equity linked to marketing metrics. Some of them are examined as follows:

- **Price Premium:** The biggest financial advantage of a strong brand is that it can command a price premium in the market. The extent of value creation is determined by the measurement of differential price between the brand and its competitors, and is also indicative of the overall brand equity enjoyed by the brand as compared to all competing brands in the market (Roll, 2009).
- **Transaction Value:** This metric gives an indication of how well the brand develops its customers so that it is able to cross-sell and/or up-sell other products and brands. The average transaction value per customer divided into product segments and geographical markets (Roll, 2009).
- **Lifetime Value:** The customer lifetime value is estimated by calculating the revenue generated by a particular customer group if that group continues to patronise the brand throughout his life. The pattern of product consumption by the customer illustrates whether the brand is able to extract more value from customers over a period of time (Roll, 2009).
- **Growth Rate:** The market strength of the brand in combination with customer loyalty and the pipeline of prospective customers give an indication of the growth opportunity for the brand (Roll, 2009).

By measuring knowledge, preference and financial metrics a brand manager can effectively carry out a comprehensive evaluation of brand and hence the strength of the brand can be valued in totality.

1.4 THEORETICAL FRAMEWORK:

A brand signals to the customer the source of the product, and protects both the customer and the producer from competitors who would attempt to provide products that appear to be identical (Aaker, 1991).

A successful brand is an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant, unique added values which match their needs most closely (Chernatony and McDonald, 1998). The brand, in a sense, acts as a credible guarantee for that product or service, allowing the consumer clearly to identify and specify products which genuinely offer added value (Murphy, 1998).

Customer-Based Brand Equity (CBBE) is defined from the perspective of the customer and is based on consumer knowledge, familiarity, and associations with respect to the brand (Washburn and Plank, 2002). As Keller (1993) explains, positive customer-based brand equity is a source of increased revenue through profits and it also assists in lowering the cost of reaching out to the end customer. The firm's ability to command higher prices gets enhanced and the customer seeks out new distribution channels to attain the brand. Positive CBBE increases the effectiveness of marketing communications, and the company can cash on new opportunities through brand extensions and licensing. According to Keller (1993), there is both an indirect and a direct approach to measuring customer-based brand equity. The indirect approach tries to identify potential sources of such equity, whereas the direct approach focuses on consumer responses to different elements of the firm's marketing program. The implications of customer-based research suggest that measures of customers' brand perceptions are accurate reflections of brand performance in the marketplace. Strong, positive customer-based brand equity has a significant influence on the financial performance of the firms (Kim and Kim, 2004).

Brand equity is a multidimensional concept and a complex phenomenon. Keller (2002) separated it into two components: awareness and association. Aaker (1991, 1996) grouped it into five categories: perceived quality, brand loyalty, brand awareness, brand association, and other proprietary brand assets such as patents, trademarks, and channel relationships (refer to Exhibit 1.1).

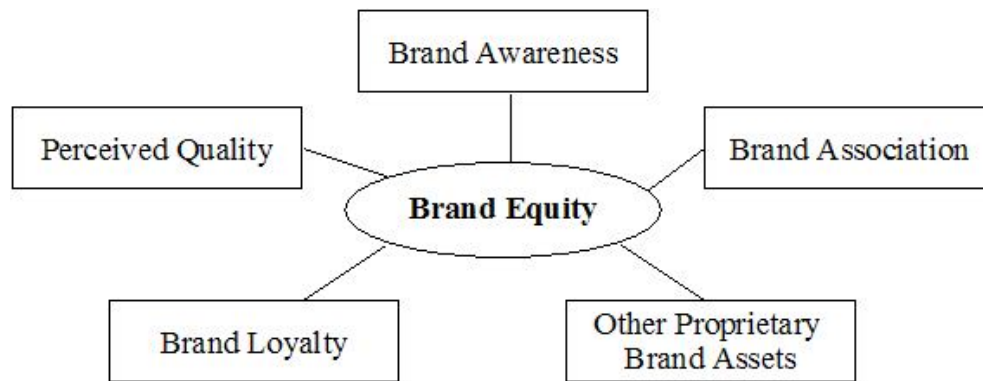


Exhibit 1.1: Customer Based Brand Equity Framework (Aaker, 1996)

Among these five brand equity dimensions, the first four represent customers' evaluations and reactions to the brand that can be readily understood by consumers (Barwise, 1993; Yoo and Donthu, 2001) and they have been widely adopted to measure customer-based brand equity in previous studies. In summary, strong brand equity means that customers have high brand-name awareness, maintain a favourable brand image, perceive that the brand is of high quality, and are loyal to the brand. Among several brand equity models in the literature, this study uses the one constructed by Aaker (1991), which is the most commonly used and cited. It has been empirically tested in a number of previous studies (Atilgan, Aksoy, and Akinci, 2005; Kim and Kim, 2004; Yoo, Donthu, and Lee, 2000). With Aaker's brand equity model, this study aims to measure the customer-based brand equity of Oil Marketing Companies. Studies based on customer based brand equity have been carried out by researchers on various sectors like hospitality, sportswear, beverage and fast food industry to understand brand equity from the customer's point of view. Study on customer based brand equity was carried out for hotel industry by Kayaman and Arasli in 2007 where the aim of the research was to explore the four brand equity components i.e. brand awareness, brand loyalty, perceived quality and brand image. Tong and Hawley in 2009 in their paper titled Measuring Customer Based Brand Equity: Empirical Evidence from the Sportswear market in China concluded that brand association and brand loyalty are influential dimensions of brand equity. Similar studies on brand

position and brand loyalty were done for fast moving consumer goods (FMCG) (Buckinx, Van den Poel, 2005) and apparel industry (Voss, Godfrey and Seiders, 2010; Chazen,1996) where it was established that higher level of brand position and brand loyalty is directly linked to higher brand equity of the organization in the market.

1.5 MOTIVATION/NEED

The oil industry influences almost all aspects of business, economics and geopolitics throughout the world. India's oil market is the world's seventh-largest and has so far been dominated by state firms such as the IOCL, BPCL and HPCL, especially in the marketing of petroleum products. These represent pretty strong brands amongst themselves, but one particular customer behavior that has intrigued the marketers and researchers for long has been the indifference exhibited by fuel consumers while making choice amongst these three brands to refuel their vehicles.

In the oil marketing business, product differentiation is very hard to sustain. Despite the fact that companies have introduced different octane fuels and additives have been added to fuel, the apparent lack of switching costs creates a challenge for marketers as consumer has no reason to stay with one particular brand.

The market share figures of the Oil marketing companies in India shows that although IOCL is the market leader with 46% share of the total market, BPCL and HPCL are in close competition with each other, occupying 19.5% and 17.5% of the market share in the financial year 2009-10 (refer to Table 1.1). The private players in totality which include Reliance and Essar also occupy 15.6% of the market share which is very close to the market share of HPCL (17.5%) and BPCL (19.5%). The table clearly indicates that the private players had a greater market share of 19% in 2005-2006 when BPCL was at 18.1% and HPCL was at 16.2% and even in the times of global recession the market share of these private players did not fall drastically.

Table 1.1: Market Share of Oil Marketing Companies

Market Share of Oil Marketing Companies (in Percentage)					
Company/Year	2005-06	2006-07	2007-08	2008-09	2009-10
IOCL	40.8	44.2	44.95	46	46
BPCL	18.1	18.8	19.28	19.7	19.5
HPCL	16.2	16.3	17.11	17.8	17.5
Other PSUs	5.9	1.8	1.75	1.6	1.4
Private Parties	19	18.9	16.91	14.9	15.6
Total %	100	100	100	100	100

Source: Petroleum Planning and Analysis cell, 2010

Although many reasons could be stated for the decline but a part of this decline in the market share of the private players is not because of competitive forces but due to conscious decision of withdrawing due to largely stated unfavourable government policies. As per the speech made by the petroleum minister Mr. Murli Deora in 2008 in Rajya Sabha “*Reliance has informed that sales at their retail outlets was negligible due to selling price differential between private and public sector Retail Outlets, leading to the closure of all their 1,432 pumps in the country with effect from March 15th*”.

Although IOCL is comfortably positioned with the highest market share but the changing market dynamics, with the entry of private players in the marketing of petroleum products cannot be ignored and should definitely be an area of concern for the Public Sector Oil Marketing Companies (PSU OMCs).

With the year on year increase in the population in India and vehicular concentration on the roads, the oil consumption in the country is exhibiting an upward trend. As stated in the Indian Auto Report 2011 (refer to Table 1.2), the Indian Automotive industry sales grew by 26% during the year 2009-10 (SIAM-Society of Indian Automobile manufacturers, 2010). The sales of auto fuels are directly related to the sales of automobiles and hence the consumption of petrol and diesel has also exhibited an upward trend.

Table 1.2: Automobile Domestic Sales Trends (in number of vehicles)

Automobile Domestic Sales Trends (in number of Vehicles)							
Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Passenger Vehicles	1,061,572	1,143,076	1,379,979	1,549,882	1,552,703	1,951,333	2,520,421
Commercial Vehicles	318,430	351,041	467,765	490,494	384,194	532,721	676,408
Three Wheelers	307,862	359,920	403,910	364,781	349,727	440,392	526,022
Two Wheelers	6,209,765	7,052,391	7,872,334	7,249,278	7,437,619	9,370,951	11,790,305
Total	7,897,629	8,906,428	10,123,988	9,654,435	9,724,243	12,295,397	15,513,156

Source: SIAM (Society of Indian Automobile manufacturers), 2010

Petroleum Planning and Analysis Cell report on consumption of petroleum shows a 13.86% increase in consumption of petroleum in 2009-2010 as compared to previous year (refer to Table 1.3).

Table 1.3: Consumption of Petroleum in India

Consumption of Petroleum (in '000 tonne)					
Year	2005-06	2006-07	2007-08	2008-09	2009-10
Consumption	8647	9286	10332	11257	12818
YOY increase in consumption		639	1046	925	1561
YOY Increase %age		7.38%	11.26%	8.95%	13.86%

Source: Petroleum Planning and Analysis Cell, 2010

The Asian Development Bank report on Efficiency and Climate change considerations for on road transport in Asia has forecasted the vehicle population and fuel consumption in India to exhibit a fast growth. It has been forecasted that by 2025 there would be 246.1 million vehicles produced in the country and the fuel consumption would be about 221 million tons of oil equivalent (refer to Table 1.4).

Table 1.4: Forecast of Fuel Consumption in India (mtoe)

Forecast of Fuel Consumption in India (in million tons of oil equivalent)				
Year	2005	2008	2015	2025
Consumption (mtoe)	58	73	115	221

Source: Asian Development Bank Report

Thus with the increase in the vehicular concentration there is going to be an increase in the demand for auto-fuel and there lies a huge opportunity before the oil marketing companies to improve their brand equity so that they can compete with the private players as well as with their Public Sector counterparts. Strong brand identity enables higher customer loyalty which gives a company an edge over its competitors. Brand loyalty can yield significant marketing advantages including reduced marketing costs, greater trade leverage, resistance among loyal consumers to competitors' propositions and higher profits.

The real efforts towards brand building by Oil Marketing Companies started in the year 2002 when the marketing of auto-fuel products was deregulated. In anticipation of deregulation, the first action taken by the oil marketing companies was to improve the appearance of their outlets. The objective was to create outlets that are not just attractive but also serve as branding tools for the company. Advertising campaigns and brand promotions enhanced by brand ambassadors were utilized by Oil Marketing Companies to create differentiation and hence enhance visibility. Introduction of convenience stores, food outlets etc. at the retail outlets was an attempt to provide non fuel revenue stream for retail outlets while providing a value added service to the customer (Choudhary S.Roy, 2011).

Although the Public Sector Unit Oil Marketing Companies have been constantly focusing on building their brand identity through modernization of the retail outlets, introduction of high octane fuels with additives, convenience stores, loyalty cards, marketing communications, sponsorships, brand promise

campaigns etc., there is still an element of indifference which is visible in the consumer behavior while deciding on purchase of auto-fuel.

For a brand to have value, it must be valued by the customer. According to Keller (2003), consumer brand-knowledge can be defined in terms of the personal meaning about a brand stored in consumer memory, that is, all descriptive and evaluative brand-related information. Different sources and levels of knowledge such as awareness, attributes, benefits, images, thoughts, feelings, attitudes, and experiences get linked to a brand and its understanding by the consumer. Brand Equity is normally measured by understanding the customer brand knowledge in terms of the position that the brand occupies in the customer's mind, the level of brand association, brand awareness and brand loyalty.

Dag Bennett, Andrew Ehrenberg and Gerald Goodhardt in 2000 had studied the brand loyalty amongst the petrol buyers in London. They had compared the purchase behaviour of the customers over two consecutive purchases. Their study concluded that loyalty related measures could be revealed through the analysis of just two purchases over a period of time.

Kumar and Sahay in 2004, in their paper titled Retailing at Petrol Pumps: From commodity dispensing to customer service, have emphasized how maintaining customer relationships through service elements are being practised by the oil marketing companies in India. Their work investigated various elements of products and services and developed a model for designing the services at petrol retail outlets to create customer satisfaction.

Consumer surveys conducted in Delhi and Mumbai by Marketing and Development Research Associates (MDRA) in 2003 revealed that consumer prefers to patronize an outlet that is easily accessible either near his residence or enroute his place of work. It is his relationship with the dealer staff that determines the level of satisfaction. Further the reputation of the dealer serves as a proxy for trust about product quality.

Since almost a decade has passed when the oil marketing companies started their brand building initiatives and not much research has been done to study the customer based brand equity for Public Sector Oil Marketing Companies hence a need was felt to carry out research in this direction and this motivated the researcher to study the customer based brand equity for the public sector oil marketing companies.

This research has been designed to get a deeper understanding of the brand awareness, customer loyalty, perceived brand quality and customer association with the brand values of these companies. This would lead to an understanding of brand equity concept in relation to Oil Marketing Companies and would have implications for practitioners working in this industry.

1.6 CONTRIBUTION OF RESEARCH

In highly competitive markets, the brand equity is very necessary. Brand equity can help establish consumer satisfaction, repurchasing intent and increases degree of loyalty. Moreover, marketing manager should effectively manage and utilize the antecedent of brand equity, including brand awareness, brand loyalty, brand associations and quality perceptions. Because the aim of brand equity is to maintain or increase the level of competitive advantage of the firm, this study would help the company officials of the public sector oil marketing companies understand the performance of their brands with relation to their competition and provide them with the insights of areas they need to work upon to increase the customer based brand equity of their organizations. Brands need to be periodically measured in terms of the impact generated on consumers, stimulating market demand and exploring opportunities for proliferation. The study would help the Oil Marketing Companies (OMCs) to understand their:

- Brand Awareness
- Perceived Quality

- Brand Association
- Brand loyalty exhibited by the customers

This study would thus help the Oil Marketing Companies to develop consumer insight for their company and also have a comparative analysis of their customer based brand equity parameters with those of the competitors.

1.7 PLAN OF THE THESIS (CHAPTER SCHEME)

The first chapter of the thesis is an introduction to the research objective. It covers the motivation/need to do the research and highlights how brand equity can be measured. The theoretical framework which has been used for the research is highlighted in the chapter followed by a description of the need which motivated the researcher to carry out study in this direction. The chapter also covers how this research would benefit and contribute towards the knowledge base of the industry

The second chapter reviews the literature on brand building efforts by various companies (oil as well as non-oil companies). The research papers published on customer based brand equity and its components as well as brand cultures are reviewed. The chapter also covers details on the components of brand values, the approaches followed and proposed through research in this field towards building successful brands. An example of Tata Tiscon which is a success story of how a commodity was strategically converted into a premium brand is discussed.

Chapter three highlights the research methodology followed to carry out the study of customer based brand equity for public sector oil marketing companies. The objectives and scope of the research and the research plan followed to study each construct of customer based brand equity is discussed. The hypothesis developed, the sampling plan followed and the calculation of sample size is also highlighted in this chapter. The type of questions framed to

carry out the research along with the statistical tools employed for carrying out data analysis are also enumerated in this chapter.

Chapter four is devoted towards highlighting the brand building activities by oil marketing companies in India. Findings from the Preliminary study conducted to understand the customer perception and preference are also a part of this chapter.

Chapter five gives an overview of the brand building activities of International oil companies. Brand building and marketing efforts of international oil marketing companies i.e. Shell, British Petroleum and Esso are discussed in details. Research findings of a survey done by A C Nielsen to understand the retailing scenario of international oil companies are also highlighted.

Chapter six is a comparative analysis based on the company literature of the brand building activities followed by the oil marketing companies in India vis a vis their western counterparts.

Chapter seven highlights the findings of the primary research carried out on consumers of petrol in the city of Indore. The chapter also highlights the inputs gained from in depth interviews of the researcher with the dealers and company officials.

Chapter eight has the conclusion of the research and highlights the recommendations and suggestions based on the findings from primary and secondary research. This chapter also highlights the limitations of the study and the scope of future research. This is followed by the reference list, bibliography and appendices.

Finally chapter nine is the summary of the thesis.

CHAPTER-2

REVIEW OF LITERATURE

Content	Page No.
2.1 Power of Brand Differentiation	18
2.2 PCDL Model for Building Brand	20
2.3 Brand Cultures	27
2.4 Brand Building in Unconventional Way	31
2.5 Measurement and Management of Brand Value	32
2.6 Additive and Inclusive Approaches to Measuring Brand Equity	32
2.7 Building Customer Based Brand Equity	33
2.8 Research on Customer Based Brand Equity Parameters	44
2.9 Brand Relationship Management (BRM)	57
2.10 18 Brand Astras	59
2.11 New Role of Brand Manager	60
2.12 From a Commodity to a Brand	62
2.13 Why Do Brands Fail?	62
2.14 MDRA Research on Branded Petrol	64

CHAPTER 2

REVIEW OF LITERATURE

INTRODUCTION

Brand equity is strategically crucial but difficult to quantify. Many experts have developed tools to analyse this asset, but there is no universally accepted way to measure it. Brand equity is the customer's perception of the financial worth of the brand identity. It is difference of the financial value of a branded good or service compared to an equivalent good or service without the brand identity (Light & Kiddon, 2010). At the root of all the marketing effects is the consumers' knowledge about the brand. According to Verma (2010) Marketing is a process by which a marketer gains by doing what is consumer relevant. Justification of a strategy comes not from its merits for the manager but from its usefulness for consumers. Branding is a practice not because managers want it but for the role it plays in consumer's life. Large companies like Coca-Cola, Nike, Google, Apple, Wipro, IBM, General Motors, Microsoft etc. are all strong brands and have helped these companies score highly on the goodwill parameter. Most brands target the emotional quotient of the customers such that the customer relates and identifies himself being a part of the brand such that he no longer is buying a product but buying a brand. Various theories have been put forth and researches have been carried out by scholars in the field of brand equity and it has been concluded that brands are one of the most valuable assets a company has. Abundance of research has been done to measure brand equity, find out the interrelationship of various parameters of brand equity and propose models to improve the strength and value of the brand. An attempt has been made by the researcher to study the published literature on brand building and thus the prime objective of this chapter is to carry out a review of the literature available on brand equity.

2.1 POWER OF BRAND DIFFERENTIATION

- Temporal (2000) stated that powerful brands provide long-term security and growth, higher sustainable profits and increased asset value because they achieve competitive differentiation, premium prices, higher sales volumes, economies of scale, reduced costs and greater security of demand.
- Knapp (2000) explained that the brand “promise” is the essence of the benefits (both functional and emotional) that customers can expect to receive from experiencing a brand's products/services, which reflects the heart, soul and spirit of the brand.
- Aaker and Joachimsthaler (2000) in their research paper on measuring brand strength stated that Brand Strength/ Brand Equity is normally measured by understanding the customer brand knowledge in terms of the position that the brand occupies in the customer’s mind, the level of association with the brand values, the brand awareness and the degree of brand loyalty expressed by the customer.
- Ruimin (2006), in the article outlining the path ahead for Asian manufacturers aspiring to build global brands stated that the prerequisite for becoming a strong brand name is to be differentiated from other businesses in the same sector and to provide consumers with excellent service. Companies can prosper by promoting quality control, forging unique enterprise culture and making products competitive.
- Desai and Waller (2010) established that the companies focus on branding activities as a strong brand helps reduce or completely eliminate competition on price. Another advantage is that no one can duplicate the brand personality. Therefore brand building is deployed as a product differentiation tactic that helps in the transition of a commodity to a special category which has the power to command higher price as compared to others in the market.

- Wikstrom (1996) stated that due to new technology and the emergence of more qualified and demanding consumers, the task before companies building strong brands is to rethink on their organizational structures, build effective communication channels and competence of front line staff and have company culture which is more customer oriented. He also stated that profits are apparent but brand health is not and great brand builders understand that brands are built over time. Building a strong brand today is incredibly difficult and it is the customer orientation which would serve as a guide for the organizations to constantly work towards being relevant to the customers. Aaker David, 2003, in his research paper titled “The Power of the Branded Differentiator”, published in MIT Sloan Management Review stated that a strong brand can turn a commoditised, undifferentiated product into something unique and special. He stated instances like, as soon as you put the brand of Tiffany on a diamond, the value of the diamond shoots up. It is no longer just a diamond, it is a Tiffany diamond. Similarly, as soon as the McKinsey brand touches a consulting project, the value of the project leaps. It is now a McKinsey study, and people assume that it is rigorous, thoughtful and valuable. The reverse is also true; a weak brand erodes value. When a brand associated with low quality touches a product, expectations sink. For instance, in US, putting the Walmart brand name on a product changes perceptions dramatically. A Walmart branded diamond isn’t really special at all. Any investor, then, should care deeply about a company’s brands. The challenge is that branding has little impact on short term profits. Brands are long term assets; they build over time and they erode over time. As a result, a company building a strong brand won’t see the results right away. Improving product quality or customer service, for example, will rarely result in a huge short term profit jump. Investing in a marketing campaign to build a brand won’t impact sales right away. A company investing in branding will often see weaker financial results in the short term, with a falling stock price. In his 1991 book on brand equity, Aaker reported on surveys which

included a worldwide study by BBDO on brand parity across 13 product categories. The results of these surveys pointed out that the consumers felt that the selection procedure they followed for purchasing products or services were more or less very similar and the same selection procedure is being adopted by them for long. A survey on the French dairy market revealed that the customers could not differentiate between the brands sold in the market. More than half of the customers chose to buy private label brands as compared to the established brands even though both were comparably priced. Since there has been limited innovation in the product class and only small improvements are made on product or packaging, there is limited amount of brand differentiation achieved by different brands. This has resulted into customers being highly price sensitive. This high sensitivity of the customers towards the price has landed the companies in tough pricing wars where each one wants to attract the customers with price discounts.

Companies have realized that brand is not just trademark, product, logo, symbol or name, but it is a name of marketable product to which relevant and unique set of associations and benefits both functional and emotional are attached. The crores of rupees companies spend on corporate identity projects are often wasted because there is no brand strategy behind them. The key to standing out from the crowd is still the development of a powerful brand image, but the nature of branding has itself been forced to change. What is emerging from this metamorphosis is a new kind of brand experience for the consumer, offering hi-tech and hi-touch brand interaction.

2.2 PCDL MODEL FOR BUILDING BRAND

Ghodeswar M. Bhimrao, (2008) proposed the PCDL model for brand building. According to him brands are indispensable ingredient to present day business and make the presale of the products a reality. The moment the prospective customer sees an advertisement of the brand, it brings the salient features and product benefits to customers' minds and thus reduces their perceived risk, and makes it easier for them to make a purchase decision. The unique selling

propositions (USPs) communicated through marketing communication channels helps the consumers to associate certain unique features and benefits with the brand which act as points of difference from the competing products and thus assist the customers in their purchase decisions. This territorial ownership of the brand as a result of its USPs is the source of a brand's market power.

Like the physical possessions of a firm, the brands are assets a firm can build, manage and harness over time to increase its profitability, revenue and overall value. At a strategic level, brands help in establishing relationships with the consumer and also assist in reducing the risks of brand and line extensions. At a tactical level the marketing communications of brands enhance the footfalls at the retail outlets and thus increase sales volume. Branding thus provides a way for a firm to differentiate its product offerings from those of its competitors..

The PCDL model suggested by Ghodeswar M. Bhimrao, (2008) for brand building comprises of four elements namely, **positioning the brand, communicating the brand message, delivering the brand performance and leveraging the brand equity.**

Positioning is related with creating the perception of a brand in the customer's mind and of achieving differentiation that it stands apart from competitors' brands/offerings and that it meets the consumer's needs/expectations. Brand marketer's major objective should be to create the desired perception in the target consumer's mind.

- Aaker (1991), stated that a well-positioned brand has a competitively attractive position supported by strong associations, such as high rating on a desirable attribute like friendly service, or store's offering of home delivery (Aaker, 1991).
- Aaker (1996) also established that a brand position is part of the brand identity and value proposition that is to be actively communicated to

the target audience and that demonstrates an advantage over competing brands.

- Keller (2003) emphasized that in an increasingly networked economy, understanding the consumer behavior effects of linking a brand to other entities such as another person, place, thing, or brand is crucial. Marketers must be able to understand how various entities should best be combined, from a consumer brand-knowledge perspective, to create the optimal positioning in the minds of consumers.
- According to Temporal (2000), the branding focus should be on adding psychological value to products, services, and companies in the form of intangible benefits – the emotional associations, beliefs, values, and feelings that people relate to the brand. By strategically positioning it in the minds of the target audience, the company can build a strong identity or personality for the brand.
- Sherrington (2003), in his paper on value creation stated that the ability to endow a product, service or corporation with an emotional significance over and above its functional value is a substantial source of value creation.
- Ward et al. (1999) said that the promise of value must be relevant to the people or businesses a company wants to have as its customers.
- According to Chernatony and McDonald (1998), the high-quality relationship developed by a strong brand brings in a sense of commitment, belonging and passion amongst the customers. The brand preference is the outcome of the emotional needs the customers have. Emotional associations can strongly distinguish the brand in customer's mind in comparison to competitors' offerings. Branding enables the process of transforming functional assets into relationship assets.
- Keller (2000) stated that in strong brands, brand equity is tied both to the actual quality of the product or service and to various intangible factors. The intangible elements of brand equity reflect the segment or type of people who use the brand i.e. “user imagery”; the occasions or situations when the brand is used i.e. “usage imagery”; the

personification of the brand for e.g. McDonald's has created a fun-loving, youth oriented brand personality. The strongest brands always strive to stay in the consideration set of the prospective consumers and keep working on their intangible cues to remain relevant to the target group.

- Upshaw (1995) identified eight alternative positioning tools used by companies as: feature-driven prompts; problem/solution prompts; target-driven positioning; competition-driven positioning; emotional/psychological positioning; benefit-driven positioning; aspirational positioning; and value positioning. Brands that are well positioned occupy particular niches in consumers' minds.

A brand needs to carve a vision of how that brand should be perceived by its target audience. The brand positioning helps in prioritizing the focus of the brand identity and resultant communication themes which enable the company to set forth the communication objectives such as the type of message, brand differentiation to be achieved and themes that appeals to the target customers. Advertising that is creatively executed helps the brand to break the clutter and build strong impact in the target market.

- Aaker and Joachimsthaler (2000), stated that the challenges faced by companies in building brands are: to be noticed, to be remembered, to change perceptions, to reinforce attitudes and to create deep customer relationships.
- Knapp (2000) said that a differentiated, "ownable" brand image can build an emotional and rational bridge from customers to a company, a product, or a service. The major channels of communications used widely to position the brands in the minds of consumers' are advertising, direct marketing, sales promotion, sponsorships, endorsements, public relations, the Internet, and integrated brand communications. Successful brands are built through creative repetition of themes in various types of media. Usage of emotions in

advertising that appeals to the hearts and minds of the people results in an emotional relationship with customers.

- Parameswaran (2001) said that a brand is the amalgam of the physical product and the notional images that go with the brand. Brand awareness is the ability of a potential buyer to recognize or recall that a brand is a member of a certain product category. Better advertising is born out of a total understanding of all the variables impacting the brand such as new consumer trends, new competition, or new technological breakthroughs.
- Temporal (2000) stated that image is a product of people's perceptions, that is, the way in which people think about or even imagine something to be.
- Brown et al. (2003) established that old brands serve to bind consumers to their pasts and to the communities that shared those brands.
- According to Upshaw (1995) brand identity hinges on who consumers are as individuals, the environment in which they live, and the signals sent from the brand itself. A brand's messages are received through a series of filters that exist within each consumer's life.
- Keller (2000) stated that the most successful brands keep up with competitors by creating points of parity (POP) in those areas where competitors are trying to find an advantage while at the same time creating points of difference (POD) to achieve advantages over competitors in some other areas. It is necessary to develop and implement long-term integrated communication strategies demonstrating the brand's value to the target customers. The message should be consistent with the brand value, brand personality and other brand identity dimensions. Strong brand helps the company in positioning and extending its brand and have a greater influence on the customer purchase processes.

Companies need to continuously track their brands against the effect of competition, especially in the face of aggressive competition. They should

track their the progress as to how their brands are doing in the marketplace, and what impact certain market interventions will have on the brand equity. Progress can be monitored in terms of the level of purchasing, consumption, brand recognition, brand recall, advertising awareness, etc. This approach will enable brand marketers to assess the effect of marketing campaign in influencing the target consumers, which in turn leads to measure the brand strength.

- Knapp (2000) stated that the transaction analysis enables the company to assign brand team members the task of experiencing all the steps a customer might go through to see how the system makes the customer feel.
- According to Balakrishnan and Mahanta (2004) there's nothing that brings people together like stories about the bad service; whether it's a mobile phone that's cut off, a television that's on the blink or a washing machine that's collapsed, getting the situation rectified is every consumer's nightmare. In product-driven companies, service is playing an important role in the brand experience as they view the brand in terms of its entire relationship with their customers. Progressive company cultivates its brand philosophy across functional lines throughout the organization, evaluates all contact points with customers, and streamlines organizational processes to meet customer needs and deliver a consistent brand experience.
- Jones (2000) in his research paper stated that a manufacturer's existing brands are potentially vulnerable to successful new brands from competitors. It is, therefore, in the manufacturer's interest to maintain the relative functional excellence of its existing brands. This means continuously upgrading their performance. The best discipline to focus attention on this upgrading is to carry out regular blind product test of the manufacturer's brand against its competitors. This helps the firm to maintain the relative functional excellence of its existing brands. This approach enables the firm to protect its brands from the impact of the successful new brands of the competitors and gain brand loyalty.

- Brand loyalty according to Chaudhuri and Holbrook (2001) may be viewed as a link in the chain of effects that indirectly connects brand trust and brand affect with the market performance aspects of brand equity.
- Brand loyalty according to Aaker (1991), is a measure of the attachment that a customer has to a brand and it reflects how likely a customer will be to switch to another brand, especially when that brand makes a change, either in price or in product features.
- Assael (2000) stated that brand loyalty represents a favorable attitude toward a brand resulting in consistent purchase of the brand over time and it is the result of consumers' learning that one brand can satisfy their needs.
- Gounaris and Stathakopoulos (2004), on the topic of brand loyalty stated that customer retention can be achieved only through fostering premium loyalty by establishing an emotional as well as a normative attachment between the brand and the consumer. Such loyal buyers can contribute to the positive word-of-mouth communication for the brand.
- Klaus and Ludlow (2002), on ways to establish brand loyalty elaborated that the companies need to set “operational standards” in all areas affecting day-to-day brand-related activities which can be applied to behaviors, management practices, service provision, customer relationship management, performance achievement, and so on.
- Ailawadi et al. (2003) emphasized the importance of a strong brand name and stated that the specific marketing effects that accrue to a product with its brand name can be both consumer-level constructs such as attitudes, awareness, image, and knowledge, and firm-level outcomes such as price, market share, revenue, and cash flow. The operational standards reinforce the assurance to target customers that the brand promise will be delivered to them.
- Keller (2003b) defined leveraging process as linking the brand to some other entity that creates a new set of associations from the brand to the entity as well as affect existing brand associations. Companies employ

different strategies in leveraging their brands namely through line extensions, brand extensions, ingredient branding and co-branding, etc.

- Desai and Keller (2002) stated that in ingredient branding, key attributes of one brand are incorporated into another brand as ingredient and it is this ingredient branding which enhances the differentiation of the host brand from competition by characterizing the ingredient attribute in the host brand more specifically. This results in establishing brand alliances between firms as they link through their products/services or marketing activities.
- Swaminathan et al., (2001) stated that in brand extensions, the parent brand experience appears to have little impact on long-term repeat purchasing of an extension across a range of cases in which perceived similarity between the parent and extension categories varied considerably. If the brand extension fails, it can harm brand equity of the parent brand by producing negative reciprocal effects. Further, they stated that parent brand experience has an impact on extension trial but not on repeat purchase.
- Subramanian and Ghose (2003) emphasized that the advertising of brand extensions produces significant reciprocal spillover that favorably affects the choice of parent brand advertising spillover effect becomes relevant when a brand name is used on two or more products that are separately advertised.

Branding has become one of the most important aspects of business strategy. Yet it is also one of the most misunderstood. Branding is sometimes considered to be merely an advertising function and many managers and business writers hold the view that branding is about the management of product image, a supplementary task that can be isolated from the main business of product management.

2.3 BRAND CULTURES

Holt B. Douglas (n.d.), in his paper titled “Brands and Branding” highlighted the brand cultures which according to him are “sticky.” He stated that once

the customers have accepted them as conventional wisdom, people are usually reluctant to abandon the conventions of the brand culture. Unless they have product experiences or encounter brand stories that profoundly contradict conventions, people are usually happy to maintain the taken-for-granted understandings of the brand. In addition to the stickiness of taken-for-granted understandings, there are two reasons for this durability.

Firstly psychological research demonstrates that brand cultures are durable because people are cognitive misers. Because we are so overloaded with information—far more information than we can reasonably digest even if we wanted to—we rely upon a variety of heuristics to simplify the world. We seek ways to minimize the amount of thinking and searching that we must do to make good decisions. Brand cultures work as one such heuristic. Once we determine that the conventional wisdom of a brand culture “works” for us (e.g., a detergent whose conventional brand story is that it performs great in all temperatures seems to do so), we are not interested in seeking out new information that would contradict this assumption. The heuristic provided by the brand works well, so we go on using it.

Secondly sociological research demonstrates another reason why brand cultures are durable. Brand cultures are shared by many people and expressed in a variety of contexts (talk, product experiences, ads, and so on). Brand cultures are maintained as the brand’s stories, images and associations pulse through these networks. Hence, it is quite difficult for an individual to opt out of the conventional wisdom of a brand culture and assign the brand alternative meanings. Just as brand cultures are formed collectively, to decommission a brand is also a collective decision. Because of this network effect, brand meanings maintain a tenacious hold until a critical mass of customers and influencers join together to transform conventions.

Brand cultures can greatly enhance customer value. If we conduct a thought experiment, we can imagine the value of a brand as the difference between what a consumer will pay for a branded product and a physically identical product without the culture. This difference can be decomposed into four

dimensions, which, together, constitute the value added by the brand. Each of these four components i.e. Reputation Value, Relationship value, Experiential value and Symbolic value accumulates through the stories, images, and associations of the brand culture.

2.3.1 Reputation Value: Shaping Perceived Product Quality

From an economic point of view, brands serve as containers of reputation. Products have tangible features that deliver on utilitarian goals: flights are on time, fabrics clean easily, tools never break down. Customers take on risk when they purchase products, particularly products that will be used into the future and products for which quality cannot be reliably evaluated upon inspection before purchase. Customers, to varying degrees, get added value from products that lower the risks of future performance failures. So when there is risk inherent in a product, customers are usually willing to pay to reduce risk. The brand operates as a signalling mechanism to increase customers' confidence that the product will provide excellent quality and reliability on important functions. The history of product experiences—both successes and failures—is spread in stories and aggregates to form part of the brand culture.

2.3.2 Relationship Value: Shaping Relationship Perceptions

Brands also communicate that the firm producing the product can be trusted to act as a long-term partner that will flexibly respond to future customer needs. For many products, especially in B2B and in services, customer uses and needs cannot be fully anticipated (and so built into a contract) at the time of purchase. For these products, research in economic sociology has demonstrated that a significant aspect of product value is the perception that the firm will respond as desired to uncontracted future contingencies. The brand is, once again, the material marker that “contains” stories conveying that the firm can be trusted to deliver on these future contingencies. Relationship value accumulates as particular stories, images, and associations that circulate around the product become conventional, taken for granted.

2.3.3 Experiential Value: Framing Consumer Experiences

From a psychological perspective, the brand acts as a perceptual frame that highlights particular benefits delivered by the product. This framing guides consumers in choosing products and also shapes their product experiences. The heuristic value of the brand provides for considerable savings in search costs and in the need to continually process information to make effective choices. Hence, firms often seek to brand their products as particularly effective in delivering on a single benefit desired by customers. A classic example comes from Procter & Gamble's range of detergent brands, each of which is framed to consumers as designed to solve a particular cleaning problem (all temperature cleaning, removing tough stains, etc.).

Experiential framing relies upon consumers who are cognitive misers, uninterested in investigating the technical supporting evidence for how brands are framed. As a result, branding efforts that frame benefits can sometimes tread in a grey area between adding customer value and manipulating customers' uses of heuristic thinking.

2.3.4 Symbolic Value: Expressing Values And Identities

Brands also act as symbols that express values and identities. Historically, humans have depended upon their material culture (clothes, homes, craft goods, public monuments, religious icons) to serve as concrete markers of values and identities. In contemporary market economies, consumer goods now dominate in serving this function (hence the term "consumer culture"). In particular, brands have become powerful markers to express statuses, lifestyles, politics, and a variety of aspirational social identities. When symbolic value becomes conventionalized in a brand culture, it often exerts a powerful halo effects on the other dimensions of brand value.

Customers get three types of symbolic value from brands: they viscerally experience desired values and identities when they consume the brand (what anthropologists call ritual action); they use the brand symbol to create social distinction, to make status claims; and they use the brand symbol to forge

solidarity and identification with others. On rare occasions, brands serve as the centre of communities. This extreme case of the solidarity effect has been considerably overstated and glamorized in marketing circles.

2.4 BRAND BUILDING IN UNCONVENTIONAL WAY

Joachimsthaler Erich and Aaker A. David, 1999, in their article titled “Building Brands Without Mass Media”, published in Harvard Business Review stated that contrary to the market share based profitability calculation done by companies, it was observed through studies conducted on the premium brands that market share alone was not responsible for the profitability of these companies. Instead, a brand’s profitability was driven by both market share and the nature of the category, or product market in which the brand competed. (Joachimsthaler and Aaker, 1999).

Joachimsthaler Erich and Aaker A. David (1999) went on to state that relying heavily on mass media to build strong brands might need a review as many unconventional means of building brands are being followed by companies. Nestle’s Buitoni brand connected with the target group through cookery classes for Italian dishes. The Body Shop focused on supporting environmental and social causes and thus gained a lot of positive publicity. Cadbury funded a theme park tied to its history in the chocolate business. The strategic move of Haagen–Dazs to open posh ice-cream parlours and be featured on the menus of fine restaurants got them high awareness amongst the customers. Hugo Boss and Swatch backed atheletic or cultural events which was a unique way in which customers could associate with the brand.

Studying the methods of companies outside one’s own industry and country can be instructive for managers. The role of visibility in creating brand equity is often underestimated. Perceptions of customers are formed as a result of awareness leading to simple recognition of the brand. Brand managers therefore strive to first make the customers aware of their brand, followed by creation of interest in them to explore and learn more about the product. This is followed by the customer desiring to own the product and finally taking the required action to purchase the brand.

2.5 MEASUREMENT AND MANAGEMENT OF BRAND VALUE

Crimmins C. James (2000) in his research paper titled “Better Measurement and Management of Brand Value” reviewed the research on brand value from the consumer’s perspective conducted by DDB Needham Worldwide. The research addressed four questions:

- What is happening to our belief in brand names?
- What is happening to our commitment to our individual brands?
- How can we measure the value added by a brand name?
- How much value is added by the typical leading brand name?

There was a sharp decline in the proportion of people who said that they tried to stick to brand names. Studies also revealed that the belief in brand names had declined 10 years ago but for the last decade, there was no decline observed in the brand names. In fact, relative to store brands and unbranded products, the belief of customers in brand names is stronger now than it was 10 years ago. Research indicated that during the last five years, one in three of the categories studied showed a significant decline in commitment to individual brands while only one in fifteen showed a significant increase in commitment to individual brands. Crimmins stated that the amount of value added by a brand name can be estimated as the ratio of the brand's price to its competitor's price when the two brands are equally desirable to consumers, minus one. Crimmins further stated that given the ability to measure the value added by a brand name, it seems only reasonable to require those responsible for the health of a brand to know how the value added by the brand name has changed in the past year. Changes in the value added by the brand name should be as routine a part of annual brand reviews and brand plans as changes in brand volume.

2.6 ADDITIVE AND INCLUSIVE APPROACHES TO MEASURING BRAND EQUITY

Abela Andrew (2002) in his research paper examined different ways of measuring brand equity and argued that the choice of measurement approach

has ethical implications. Interpretations of a brand tend to be divided into kinds: additive (Ambler and Barwise, 1998) and inclusive (Barwise, 1993). Andrew argued in his paper that inclusive approaches to measuring brand equity are preferable to additive ones because they enable the researcher to work with a much broader concept of brand. He even argued that additive approaches of measuring brand equity can predispose marketers towards unethical activities. The additive interpretation of brand depicts product and brand as separate, with the brand as a mark that is added to a product. The inclusive interpretation, by contrast, portrays product and brand as combined, where the product is included in the brand. Barwise's review of the early years of brand equity research concluded that virtually all definitions of brand equity focus on the incremental effect of the brand name, which would seem to imply the additive interpretation.

2.7 BUILDING CUSTOMER BASED BRAND EQUITY (CBBE)

Building a strong brand with great equity provides a host of possible benefits to a firm, such as enhanced customer loyalty and immunity to competitive marketing actions or marketing crises; increased margins; favourable customer response to price fluctuations; enhanced level of intermediary cooperation and support; effectiveness in all marketing communication efforts; and finally licensing and brand extension opportunities.

Companies are interested in building strong brands with great equity, but getting there isn't always easy. Customer-based brand equity (CBBE) model, developed by Aaker in 1991 explains the meaning and way of building, measuring and managing brand equity. The CBBE model was designed to be comprehensive, cohesive, well-grounded, up to date and actionable. This model explains that brand equity is dependent on learning and feelings of the customer over time. Thus brand power is what resides in customer's mind. Marketers' continuing challenge in building a strong brand is to ensure providing experiences worth remembering to the customers such that the desired thoughts, feelings, images, perceptions, and attitudes become linked to the brand (Keller, 2002).

Brand Strength or Brand Equity is normally measured by understanding the customer brand knowledge in terms of the position that the brand occupies in the customer's mind, the level of association with the brand values, the brand awareness and the degree of brand loyalty expressed by the customer (Aaker, 1991). According to Keller (2002), consumer brand-knowledge can be defined in terms of the personal meaning about a brand stored in consumer memory, that is, all descriptive and evaluative brand-related information. Different sources and levels of knowledge such as awareness, attributes, benefits, images, thoughts, feelings, attitudes, and experiences get linked to a brand and its understanding by the consumer. A company should be able to answer the following queries that customers usually have about brands:

- (1) The first question is on brand identity: (Who are you?)
- (2) The second question is targeted towards the meaning of the brand: (What are you?)
- (3) The third question is towards the brand responses of the customers: (What are the feelings generated about you?)
- (4) Finally the last question is on brand relationship: (What kind of association and the level of a connection would I want to have with you?)

The steps in this "branding ladder" follow an order of first creating an identity to meaning to eliciting responses from customers and finally working towards relationships. Meaning cannot be established without first creating identity; responses cannot occur unless companies develop the right brand meaning; and a relationship cannot be forged without getting the proper responses from customers.

2.7.1 Customer Based Brand Equity Pyramid

Imagine the foundation of a strong brand as a logically constructed set of six "brand-building blocks" with customers: salience, performance, imagery, judgments, feelings, and resonance. Then assemble these building blocks in a brand pyramid. To create significant brand equity, it's crucial to put the right

brand building blocks in place and then reach the pinnacle of the pyramid. Exhibit 2.1 represents the customer based brand equity pyramid as proposed by Keller and Aaker.

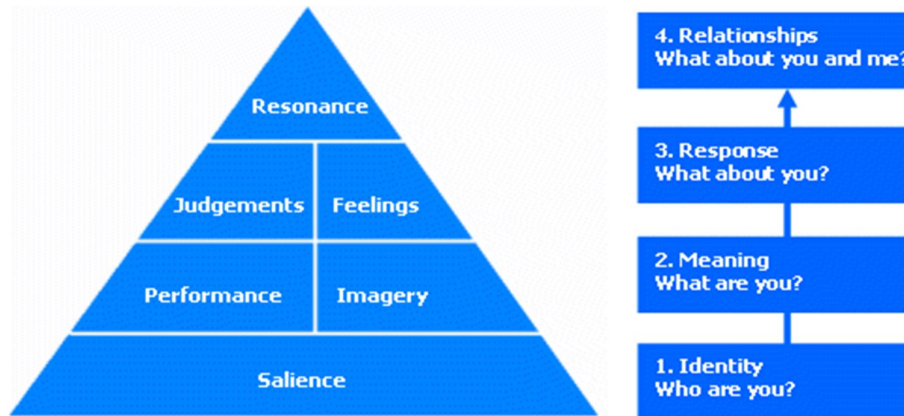


Exhibit 2.1: Customer Based Brand Equity Pyramid

2.7.1.1 Brand Identity

Attaining right brand identity requires the creation brand salience with the target customers. Brand salience relates to various aspects of brand awareness like how often does the customer think of the brand and under what circumstances? It also is a measure of the extent and ease with which the brand is recalled or recognized. The types of cues or reminders required to remind the customer of the brand and finally the pervasiveness of the brand awareness measures brand salience. Building brand awareness therefore means ensuring that customers understand the product or service category where the brand competes and creating clear links to products or services marketed with specific brand names. Creating a brand identity therefore means making sure that the customers are aware of the needs being satisfied by a particular brand and also that they are aware of the functional benefits of using a particular brand (Keller, 2002).

- **Criteria for brand identity**

As per Keller (2002) depth and breadth are the two key dimensions that distinguish brands. The ease of recall and recognition of the brand by the

customers is described as the depth of the brand. Breadth on the other hand is related to the range of purchases and consumption situations of the brand by the consumer. A brand with high salience has both depth and breadth of brand awareness where sufficient purchases of the brand are made by the customers across a variety of settings. The brand must not only be "top of mind" and have sufficient "mind share," but it must also do so at the right time and place. The prime question for most of the brands apart from brand awareness and recognition is the occasion, time and frequency of remembering the brand as many brands and products are often ignored or forgotten at possible usage situations. Marketers therefore need to increasing the salience of the brand such that it drives consumption and ultimately sales (Keller, 2002).

2.7.1.2 Brand Meaning

Keller (2002) stated that creation of a brand image to establish the characteristics of the brand in the consumers' mind is the prerequisite to establish brand meaning. Brand meaning can either be established on functional and performance related characteristics or on more abstract and imagery related dimensions. These brand associations result either due to personal experiences of the customer with the brand or due to some other source of information (e.g., word of mouth) (Keller, 2002).

- **Performance**

The product is the core of brand equity which ultimately shapes the way customers feel about the brand based on their experiences of how the product fairs in the various performance related criteria of the customer. Hence a prerequisite of successful marketing is to design and deliver products which satisfy the stated and unstated customer needs and wants. It is very essential for marketers to ensure that the product or service performs as per the marketing communications of the company such that customers' experiences with the product are met if not surpassed. This would help create brand loyalty and resonance. Brand performance refers to the way the elements of the product function and the extent to which the brand rates on objective quality parameters. It also measures the utilitarian and aesthetic quotient of the brand

in satisfying the customer needs and wants in that product or service category (Keller, 2002). Although performance attributes and benefits can vary by category, however, following attributes and benefits usually describe brand performance:

(a) **Primary characteristics and supplementary features:** Customers beliefs about the levels of performance of primary as well as secondary characteristics of the product determine their rating of product performance. For example the actual performance of the product complemented by patented features act as determinants of brand performance by customers (Keller, 2002).

(b) **Product reliability, durability, and serviceability:** Customers rate the product performance based on their consistent performance and durability which is a measure of the expected economic life of the product. The ease with which a customer can get the product repaired or serviced also act as a determinant of product performance. Thus the factors like speed, accuracy, delivery and installation, customer service and training and quality of after sales service help the customer in forming certain perceptions of product performance (Keller, 2002).

(c) **Service effectiveness, efficiency, and empathy:** Customers have performance-related associations related to service interactions they have with brands. A brand that completely satisfies customers' service requirements with speed and responsive behaviour helps in building a relationship of trust with customer's interests in mind (Keller, 2002).

(d) **Style and design:** Consumers may have associations with the product that go beyond its functional aspects to more aesthetic considerations which may depend on sensory aspects such as the looks and feel of the product. It may even involve the aesthetic appeals of sounds and smell (Keller, 2002).

(e) **Price:** The pricing policy for the brand helps creating distinctive associations in consumers' minds. The customers have different quality perceptions with low, medium, or high priced brands. The frequent or infrequent price discounts offered by a brand also elicits distinctive

perceptions amongst the customers with regards to the price volatility or variance of the brand. Brand performance therefore encompasses the "ingredients" that make up the product or as well as the secondary layer of emotional appeal that complements the core product. The above performance dimensions thus help differentiating the brand from competition.

- **Imagery**

Brand meaning includes brand imagery, which deals with the extrinsic properties of the product or service, including the ways the brand attempts to meet customers' more abstract psychological or social needs. Four categories of brand imagery are as follows:

(a) **User Profiles:** Consumers might have a particular image or profile of the users of a particular brand. For instance the consumers might associate a particular brand with certain demographic profile of the users like age, gender or social status. The brand may even be associated with more abstract psychographic factors like position in society, career, politics or attitudes toward life. In a B2B setting, the type and size of the organization gives the customers clues about the user profiles. If customers believe many people use a brand, they may then view the brand as "popular" or a "market leader."

(b) **Purchase and Usage Situations:** The customers might associate brand image with purchase situation based on the intermediaries in supply chain like distributors, wholesalers or retailers; the type of store like departmental store, supermarkets, hypermarkets etc. and the ease of purchase. The usage situations give indications of when or where the brand is used and type of activity i.e. formal or informal where the brand is used.

(c) **Personality and values:** Brand personality is often related to more descriptive usage imagery, but involves more contextual information. Jennifer Aaker identified five dimensions of brand personality: (1) sincerity (e.g., down to earth, honest, wholesome, cheerful); (2) excitement (e.g., daring, spirited, imaginative, up-to-date); (3) competence (e.g., reliable, intelligent,

successful); (4) sophistication (e.g., upper class, charming); and (5) ruggedness (e.g., outdoorsy, tough).

(d) **History, heritage and experiences:** The association of the brand with events of past shape the brand history. Distinct personal experiences of the customer with the brand in the past or past behaviours and experiences of others shape the usage imagery. Specific and concrete customer experiences in the past shape the associations with history, heritage, of the brand which finally transcend the generalizations of usage imagery.

Criteria for brand meaning:

Strength, favourability and Uniqueness of a brand help in understanding the level of association the customer has with the brand:

(1) **Strength** refers to the measure of bonding of the brand by the customer with its brand values.

(2) **Favourability** of the brand is a determinant of how the association with the brand values guides the customers to place the brand in their consideration set.

(3) **Uniqueness** refers to the distinctiveness of the brand from the competition based on the customers association with the brand properties.

Successful results on the above dimensions of strength, favourability and uniqueness produce positive brand responses which ultimately take the shape of committed and intense brand loyalty. Therefore the key to creating strong brand equity requires the brand managers to work towards building strong, favourable, and unique brand associations. The uniqueness of a brand association is immaterial if customers are unable to evaluate the association favourably. Similarly the desirability quotient of brand association is useless unless customers actually recall it and link it to the brand. Marketers need to remember that not all associations may be favourable and unique. Strong brands usually enjoy strong, favourable, and unique brand associations, which assist in building customer-based brand equity. For example Volvo brand

stands for engineering excellence and safety, Intel signifies performance compatibility, Marlboro is associated with western imagery, brand Disney can be associated with feelings of fun filled family entertainment while BMW brand is synonymous with styling and driving performance.

2.7.1.3 Brand Responses

According to Keller, (2002) in order to implement the CBBE model, companies need to be attentive towards the customer responses towards the brand and try deciphering the thoughts and customer feelings about the brand. The brand judgements which are a function of evaluations done by customers' minds and the brand feelings which result from the emotional connect with the brand shape the responses a brand receives from the customers.

- **Judgments:** Brand judgments are the individual opinions of the customers about the brand and are dependent upon the way they associate with the performance and imagery of the brand. Customers usually make the following four types of summary judgments in ascending order to assess the brand strength:

(a) **Quality:** The perceived quality of the brand by the customers is amongst the most important judgement about the product done by the customer. These perceptions are dependent on the cost benefit analysis of the product by the customers.

(b) **Credibility:** The credibility of the brand is a measure of the brand on three dimensions i.e. expertise, trustworthiness and likeability. The extent to which the brand is perceived to be competent, innovative, dependable, and worth spending time with is a determinant of the credibility of the brand.

(c) **Consideration:** Despite favourable brand attitudes and credibility of a brand the customers might not place the brand in their consideration set while thinking of spending on a particular product or service category. Hence the brand needs to be viewed by the customer as relevant, appropriate and meaningful to them.

(d) **Superiority:** Customers would invest in a brand only when they perceive the brand to be unique and better than the competing brands and believe that it would deliver advantages which other brands cannot. These unique differences would create brand superiority which is the prerequisite for building intense and dynamic relationships with customers. It is also dependent on the number and nature of unique brand associations which a customer has with the brand.

- **Feelings:** The emotional reactions of the customers towards a brand are a result of the marketing communications and the customers' repeated experiences with the brand. The nature and intensity of feelings can range from being mild to intense and from being positive to extreme negative. Kahle and colleagues pointed out six important types of feelings related to brand building. The feelings of warmth, fun and excitement are more experiential and immediate, while the feelings of security, social approval and self-respect are more private and enduring.

(a) **Warmth:** The feeling of warmth with a brand encompasses the experience of peace, sentimental attachment and being affectionate towards it.

(b) **Fun:** The brand evokes feelings of amusement, cheer and joy. Consumers feel upbeat, playful and light hearted when they associate with the brand.

(c) **Excitement:** Consumers feel elated and energised when they associate with the brand and this brings in a feeling of excitement which makes the consumers experience a sensation that the brand is cool or happening.

(d) **Security:** The brand promise of safety and comfort assures the customers who set aside all worries or concerns about the brand.

(e) **Social approval:** Consumers feel elated when by using a particular brand their esteem value goes up and positive feelings are generated when consumers feel that the use of particular brands automatically brings in social approval from a particular segment. When people directly acknowledge the consumer using the brand then such instances of social approval strengthen the bonding of the customer with the brand.

(f) **Self-respect:** A feeling of self-respect and accomplishment is generated when the brand makes consumers' feel good about themselves, and thus creates a sense of pride and accomplishment.

Criteria for brand responses: Although all types of customer responses are possible when driven from both the head and heart, ultimately what matters is how positive they are. Additionally, the customers should experience the ease of accessing the brand and should be able to recollect the brand name whenever they need a particular product category. Positive brand judgments and feelings which are a result of excellent customer brand encounters therefore favourably influence consumer behaviour.

2.7.1.4 Brand Resonance

The last step is focused towards the strength of relationship and the extent of personal identification of the customer with the brand. Brand resonance thus refers to the nature of the relationship of the customers with the brand and is characterized by the depth of the bonding the customers have with the brand. It is also a measure of the level of activity this loyalty engenders. The four categories into which this brand resonance can be broken down are:

(a) **Behavioural Loyalty:** The prime components of behavioural loyalty are the number of repeat purchases and the share of category volume attributed to the brand. It therefore implies that behavioural loyalty is measured by the frequency of purchases made by the customer and also the volume/quantity of their purchase. Profit would only be realised if the brand generates sufficient purchase frequencies and volumes.

(b) **Attitudinal Attachment:** Purchasing a particular brand by the customer might be guided to fulfil his/her necessity if the brand is the only product readily accessible or is the only one he/she could afford to buy. The customers need to perceive the brand as offering something special. Only then brand resonance can be created. Customers having a great deal of attitudinal attachment to a brand state they "love" it and describe it as one of their favourite possessions.

(c) **Sense of Community:** A sense of belonging and identifying with a community gets generated and customers thus feel a kinship with other people associated with the brand. These connections may involve fellow brand users or may even go the extent of relating with the company and its employees.

(d) **Active Engagement:** The strongest affirmation of brand loyalty is when customers invest time, energy, money, or other resources into the brand apart from those expended during purchase or consumption. When customers show their willingness to join a brand club or exhibit keenness in receiving updates and exchange correspondence with other brand users, they are said to be actively engaged with the brand. They may visit brand-related Web sites or participate in chat rooms. Under such circumstances, customers become brand evangelists and thus help in communicating and strengthening the brand relationship of others. Strong attitudinal attachment and/or sense of community are the prerequisites for active engagement with the brand.

Criteria for brand relationships:

Intensity and activity are the two dimensions of brand relationships. Intensity is a measure of the strength of the bonding or attachment the customer has with the brand. It also inculcates sense of community amongst the users of a particular brand. Activity is the measure of the frequency of customer purchases of the brand as well as the various ways in which the company engages the customer in other activities which are not related to purchase and consumption on a day-to-day basis. Examples of brands with high resonance include Harley-Davidson, Apple, and eBay.

The strongest brands excel in all six of the brand-building blocks of achieving brand salience, brand performance, brand imagery, brand judgements, brand feelings and brand resonance. The most valuable building block, brand resonance, occurs when all the other brand-building blocks are completely in sync with customers' needs, wants, and desires. (See Exhibit 2.2).

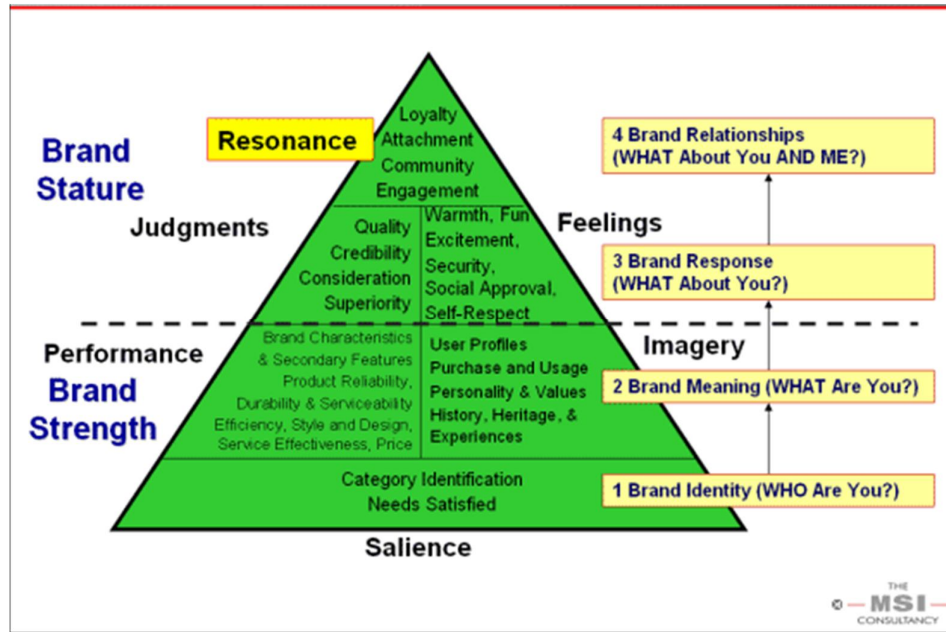


Exhibit 2.2: Sub Dimensions of Brand Building Blocks

Simply put, brand resonance reflects a completely harmonious relationship between customers and the brand. A brand with the right identity and meaning can result in a customer believing the brand is relevant to them. The strongest brands will be the ones to which those consumers become so attached that they, in effect, become evangelists and actively seek means to interact with the brand and share their experiences with others. A carefully constructed and sequenced brand-building effort based on the CBBE model can help companies achieve brand resonance. Firms that are able to achieve resonance and affinity with their customers should reap a host of valuable benefits, such as greater price premiums and more efficient and effective marketing programs. Using the CBBE model, marketers can better assess how brand-building efforts are progressing and can create successful marketing research initiatives.

2.8 RESEARCH ON CBBE PARAMETERS

In the increasing clutter of brands, marketers are finding it difficult to create a distinct place for their brands. One of the most important brand management activities is positioning the brand properly where marketers try to create an

image or identity in the minds of their target market for its product, brand or organisation. Thus positioning is something (perception) in the minds of the target market. This positioning as the name implies involves identifying the optional location of a brand and its competitors in the minds of the consumers to maximise potential benefit to the firm.

- That the concept of positioning is recognized as one of the important components of advertising and modern marketing theory and practice (Alden, Steenkamp, and Batra, 1999; Hooley and Greenley, 2005; Prince, 1990; Ries and Trout, 1986) cannot be overemphasized and has been studied and established as main objective behind designing all marketing communication activities.
- McAlister, Srinivasan & Kim, (2007), stated that advertising and positioning are inextricably geared toward creating value for any firm and its offerings, in that they enhance firm performance and reduce systematic risk.
- According to Hooley, Greenley, Fahy, and Cadogan, 2001; Porter, 1996; Ries and Trout, 1986 Trout, 1996, how a firm chooses to position itself and/or its offerings is central to the creation of marketing strategy and dictates the implementation of advertising and marketing communications practices in the short, medium, and long term.
- Burton and Easingwood (2006) stated that the employment of positioning strategies that leads to creating a position in the marketplace is undertaken over time through deployment of marketing practices including advertising, public relations, promotion, sales inducing efforts, publicity, brand management, firm image and reputation, product development, and cost controls and putting in place pertinent market orientation processes. Positioning is conceptualized as a complex multidimensional construct that attempts to positively adjust the tangible characteristics of the offering and the intangible perceptions of the offering in the marketplace.
- The findings of the brand positioning study carried out on the automobile sector by Blankson et. al, 2008 reveal positive association

between positioning strategy and firm performance. The study concluded that there existed a strong correlation between the brand equity and brand position of that company in the minds of the customer.

- Sengupta Subroto,(2005) states that when a respondent to market research studies is asked to name a brand (or company) for a particular product category then the first name that is taken by the respondent is the measure of the brand position in his/her mind. Although the respondent may be aware of many other brands/ companies for the mentioned product category, but the fact that he/she responds with a particular brand name as a response to the query put forth by the interviewer reflects that the brand mentioned enjoys a higher position in the mind of the respondent as compared to other brands. Since 'position' of a brand is its perception among target consumers, all the companies try to identify Unique Selling Propositions (USPs) so that they can do effective positioning for a place in the consumer's mind.
- Kotler (2000) said that quality can be defined as the totality of features and characteristics of a product or service that bear on its ability to satisfy stated or implied needs. Quality also can be represented in two forms: objective and subjective. The former refers to actual quality, while the latter refers to a consumer's perception of quality.
- Zeithmal (1998) expressed that perceived quality also represents consumers' judgements regarding a brand's overall excellence or superiority.
- Research by Bellizzi et al., 1981; Bushman, 1993; Richardson et al., 1994; Rosen, 1984; Wheatley et al., 1977 supports the view that store brands are perceived to have a lower quality than national brands.
- Richardson et al. (1994) examined the relative importance of extrinsic cues versus intrinsic cues in determining perceptions of store brands' quality in an experiment using a sample of 1564 shoppers for five products. In their study, extrinsic cues were product attributes that were not part of the physical product, such as price and brand name; on

the other hand, intrinsic cues were attributes that could not be changed without altering the physical nature of the product, such as product ingredients and taste. The important findings of their experimental study were: (1) regardless of ingredients, national brands are perceived to be of higher quality than private labels; (2) extrinsic cues (e.g. brand name) are more influential than intrinsic cues (e.g. ingredients); and (3) perceived quality has a greater influence on consumer decision making than other factors such as value-for-money – even for purchasers of store brands.

- Mitra and Golder (2006) explained that perceived brand quality represents consumer's view of how well a brand meets their requirements and expectations.
- Rust, Zahorik and Keiningham (1995) described how firms devote significant resources to quality improvement programs and staff training.
- Guo and Zhao (2009) stated that firms voluntarily provide quality information to improve consumer perceptions to brand quality. Kopalle and Lehmann (2006) also went on to state that managers are likely to align their pricing and advertising strategy (e.g. charge higher prices and place advertisements in high quality media vehicles) to increase brand quality.
- Steenkamp, Batra and Alden (2003) stated that perceived brand quality is positively related to purchase likelihood.
- Dhar and Hoch (1997) stated that consumers price sensitivity matters less for high-quality brands. Randall, Ulrich and Reibstein (1998) also went on to state that perceived brand quality allows a brand to command significant price premiums. Erdem, Keane and Sun (2008) stated that perceived quality is positively related to price and frequent price cuts lower perceived brand quality.
- According to Woodruff (1997), competitive advantage is achieved by companies only if they are successful in creating customer value. From the middle of twentieth century creation of customer value is mainly

focused towards manufacturing products with high quality (Crosby, 1979; Feigenbaum, 1951; Juran et al., 1974). The prime activity of value creation in a service driven economy is find ways and means to meet customers' expectations and satisfaction (Gorst et al., 1998; Kristensen et al., 1992; Parasuraman et al., 1988). Mitchell (2003) also stated that marketers use brand experience in three different ways. Their primary focus is concerned with the quality of the product. The second dimension is geared towards providing excellent brand experience when the customer comes in contact with a particular product or service. The third dimension of brand experience is the experience the marketers sell.

- Repeated purchase in terms of volume and value was alone a significant measurement of customer loyalty until the 1950s. This one dimensional measurement model of loyalty concept customer behaviours was criticised in that the domain of customer loyalty had to conceptually go beyond customers' behavioural measures. Dick and Basu, 1999 argued that loyalty should not be regarded as mere repurchase behaviour. This opened the door for a large number of variables that can be examined as the consequences of evaluative constructs in studies of brand loyalty.
- In the research paper by Oliver (1997), from a behavioural perspective, loyalty is defined as the degree to which a buying unit, such as a household, concentrates its purchases over time on a particular brand within a product category whereas from an attitudinal perspective, brand loyalty is defined as “the tendency to be loyal to a focal brand as demonstrated by the intention to buy it as a primary choice”.
- Brand loyalty is also sometimes viewed as a special case of relationship marketing, where the consumer has a significant psychological attachment to the brand entity consumed. Researchers have investigated the relational variables that lie at the heart of a consumer – brand relationship (Chaudhuri and Holbrook, 2001), which lead to brand loyalty.

- Knox and Walker, 2001 have differentiated between two categories of brand loyals i.e. Pseudo-loyals and Committed loyals. Pseudo-loyals are the customers who go for repeat purchase of a particular brand but do not have strong attitudes towards the brand. They may buy the brand because of its price sensitivity or availability of a brand. Committed loyals also known as active loyals are the customers who will only purchase one particular brand.
- Punniyamoorthy and Prasanna Mohan Raj in 2007 had developed an empirical model based on factor analysis for measuring brand loyalty in English newspapers.
- Study on customer based brand equity was carried out for hotel industry by Kayaman and Arasli in 2007 where the aim of the research was to explore the four brand equity components i.e. brand awareness, brand loyalty, perceived quality and brand image. Their paper concluded that managers should try to influence perceived quality, brand loyalty, brand image and brand awareness in their organization as all these components contribute towards increasing the brand equity of the organization.
- Tong and Hawley in 2009 in their paper titled Measuring Customer Based Brand Equity: Empirical Evidence from the Sportswear market in China concluded that brand association and brand loyalty are influential dimensions of brand equity.
- Similar studies on brand position and brand loyalty were done for fast moving consumer goods (FMCG) (Buckinx, Van den Poel, 2005) and apparel industry (Voss, Godfrey and Seiders, 2010; Chazen,1996) where it was established that higher level of brand position and brand loyalty is directly linked to higher brand equity of the organization in the market.
- Dag Bennett, Andrew Ehrenberg and Gerald Goodhardt in 2000 had studied the brand loyalty amongst the petrol buyers in London. They had compared the purchase behaviour of the customers over two consecutive purchases. Their study concluded that loyalty related

measures could be revealed through the analysis of just two purchases over a period of time.

- A statistical analysis was carried out by Ang and Tan in 1990 on how diesel and petrol sales to road vehicles are affected by several non-price marketing strategies in Singapore. The analysis was based on the monthly sales data over a four-year period for a subsidiary of a major international oil company. The results depicted the effectiveness of these marketing strategies in the highly competitive Singapore retail market.
- Kumar and Sahay in 2004, in their paper titled “Retailing at Petrol Pumps: From Commodity Dispensing to Customer Service”, have emphasized how maintaining customer relationships through service elements are being practised by the oil marketing companies in India. Their work investigated various elements of products and services and developed a model for designing the services at petrol retail outlets to create customer satisfaction.
- Marketing and Development Research Associates (MDRA) in 2003 conducted a survey on 336 customers to identify the preference of customers for branded fuels. Their research concluded that though more than 40% of the customers preferred using branded fuel, still there existed a large group of people who did not prefer the branded fuel because of it being highly priced. Also the advantages of switching over from unbranded fuel (unleaded normal fuel) to branded fuel with high octane levels and additives were not clearly perceived by the customers.
- From an empirical point of view, numerous researchers have shown that brand awareness measures are powerful predictors of consumer choice behaviour (Haley and Case 1979; Nedungadi and Hutchinson 1985).
- From a conceptual or theoretical point of view, brand awareness has been recognized as preceding and necessary to brand evaluation (Howard and Sheth 1969; Holden and Lutz 1992).

- The customer-based brand equity framework, developed by Keller (1991), defines customer-based brand equity as the differential effect that consumer knowledge about a brand has on the customer's response to marketing activity. Positive customer-based brand equity results when consumers respond more favourably to a product, price, or communication when the brand is identified than when it is not.
- Rossiter and Percy (1987), stated that brand awareness is typically measured by recall or recognition. Researchers point out that recall measured by presenting a product category and asking respondents to recall brands from that category gives an indication of the brand awareness. Researchers also typically take a recognition measure in which they present the brand name and ask respondents whether they know of the brand.
- David A. Shore (2005) who teaches the graduate course on branding at Harvard University says, *"As life gets more complicated and consumers have less time, the ability of a brand to be a predictable experience is important, in that consumers will automatically return to that same brand."* Branding is more than just about communications. It's what makes you want to put Nike on your feet, Disney in your vacation, and Haagen-Dazs in your refrigerator."
- Yang and Smith (2009) express that today's consumers are inundated with information and communication. People need a way to cut through the clutter. Brands can become trusted shortcuts. Advertisement creativity can play an important role in making cognitive responses more favourable, thereby increasing message acceptance and persuasion. In an advertising context, brand attitudes have been shown to be influenced by affective reactions such as perceived entertainment value and/or affect transferred from more favourable ad attitudes.
- McGuire (1968) developed the Hierarchy of Effects model that focused on the role that cognitive processes play in the persuasion process. He proposed that the persuasive impact of messages could be viewed as

the multiplicative product of six information processing steps: presentation, attention, comprehension, yielding, retention, and behaviour. The Hierarchy of Effects structural model explains that exposure to advertisements of the brand results in brand awareness followed by learning drawn from the ad claims and thereby resulting into message acceptance. These stages have been classified as cognitive stages where a customer understands the ad. This stage is followed by the affective stage where a customer develops a liking for the brand and ultimately the conative stage where a customer forms brand intentions which may be either positive or negative.

- Lavdige and Steiner (1961) applied the Hierarchy of Effects model directly to advertising. The result was a seven step model that begins with consumers who are completely unaware of the brand and then go through successive steps of awareness, knowledge, liking, preference, conviction, and purchase.
- Studies on brand awareness were carried out for airline brands (Underwood, 1997; Rosser, 2002; Thomaselli, 2005; Ramage, 2005 and Chen and Tseng, 2010), FMCG (Broadbent & Colman, 1986), and apparel brands (Ryan, 2005; Bhardwaj, Kumar & Youn, 2010).

Various studies have been conducted by various researchers on the effects of advertising creativity in persuasion context and almost all of these studies have revealed that creativity enhances the brand awareness amongst the customers. A summary of the various researches in this direction and their major findings have been enlisted in table 2.1. Some of the researches point out that creative advertisement enhances customers' unaided recall of brand ideas. Another research pointed out that advertisement creativity enhances product evaluation if customers are sufficiently motivated and the ambiguity does not impede the verification of the advertisement claims.

Table 2.1: Empirical Studies on the Effects of Advertising Creativity in Persuasion Context

Variables investigated	Reference	Major findings
Recall/memory	Pick, Sweeney, and Clay 1991 Stewart and Furse 1984; Till and Baack 2005; McQuarrie and Mick 1992; Pieters, Warlop, and Wedel 2002	Creative ads enhance customers' (unaided) recall of ad ideas
Recognition	Pick, Sweeney, and Clay 1991	Creative ads enhance consumers' recognition in an incidental learning context.
Ad attitudes/liking for the ad	Kover, Goldenberg, and James 1995; Ang and Low 2000; Till and Baack 2005; McQuarrie and Mick 1992; Smith et al. 2007	Creativity facilitates ad attitudes (only when the ad has positive feelings).
Brand Attitudes	Goldenberg, Mazursky, and Solomon 1999; Ang and Low 2000; Till and Baack 2005; McQuarrie and Mick 1992; Smith et al. 2007	Creativity facilitates brand attitudes *Creativity does not enhance Brand Attitudes
Product Evaluation	Peracchio and Meyers-Levy 1994	Ad creativity enhances product evaluation if consumers are sufficiently motivated and the ambiguity does not impede the verification of the ad claims
Purchase intention	Kover, Goldenberg, and James 1995	Creativity facilitates purchase intention *Creativity does not enhance purchase intention
Emotional Reaction	Kover, Goldenberg and James, 1995	Advertising that provides for personal enhancement is most effective
Attention	Pieters, Warlop and Wedel 2002, Till and Baack 2005; Smith et.al. 2007	Creative ads draw more attention to the advertised brand
Motivation	Smith et al., 2007	Creative ads induce greater motivation to process the information
Depth of Processing	Smith et. al., 2007	Creative ads induce deeper information processing
*Conflicting results found in the literature		

- Hirschman and Holbrook (1982), stated that rational and emotional elements help building brands and that the buying and consumption processes are enhanced due to the emotions evoked by the brand. Brands therefore appeal both the head and heart of the consumers and it is because of this duality approach that strong brands are able to blend product performance and imagery to create a rich, varied, but complementary set of consumer responses to the brand.
- Research by Bhat and Reddy (1998) pointed towards the multidimensionality of the brand which encompasses both functional and symbolic benefits. By catering to both rational and emotional concerns of the customer, a strong brand provides multiple access points to the customers when they can differentiate the brand from the competition.
- Keller (1993, 1998) emphasised the importance of brand awareness and brand image which are the main constituents of brand knowledge. Brand awareness includes the recognition and recall of the brand whereas brand image is the perception of the brand amongst the customers which are formed as a result of customer's experiences with the brand and the brand associations formed thereafter.
- Aaker (1991) argued that brand associations are the category of brand assets and liabilities that include anything "linked" in memory to a brand. Brand associations may be conceptualised as a uni-dimensional construct or multi-dimensional but the alternatives have not been subject to empirical investigation. Consumers acquire, develop and refine brand values from a multitude of external sources and their own experience but it is generally accepted that advertising is a primary source of image creation.
- McDonald (1992) and Meenaghan (1995) illustrated that whilst advertising is not an essential prerequisite for branding it can influence the acquisition and positioning of brand values that are symbolically attractive to consumers in relation to their expectations.

- Following the majority of cognitive psychologists, brand researchers believe that brand information is organised as a network in consumer memory (Collins & Quillian, 1969; Collins & Loftus, 1975; Tversky 1977). Such networks consisting of associations like product features, logos, usage situations and associative links (Solomon, 2006), show the unique value of branded goods and services to consumers (Aaker, 1997). The graphical representation of such a brand memory is called a brand concept map (BCM) (Roedder John et al., 2006).
- In the literature, qualitative and quantitative methods are used to measure brand image perception. Several qualitative techniques have been developed to elicit brand associations. Kotler & Keller (2006) defined these as ‘all brand-related thoughts, feelings, perceptions, images, experiences, beliefs, attitudes that become linked to the brand node’. Marketers use free association tasks, asking respondents what comes to mind when they think of a certain brand (Gree & Srinivasan, 1990). Projective techniques, like comparison tasks (Vriens & Frazier, 2003) or interpretation tasks, are used when consumers are reluctant to express their feelings.
- According to Kotler & Keller (2006), brand personality, i.e. ‘the specific mix of human traits that may be attributed to a particular brand’ is also used to measure brand image through open-ended questions (Swait et al., 1993) or ratings of the ‘Big Five’, a scale of five factors developed by Aaker (1997) to assess the brand’s personality. Multidimensional scaling is also used to understand the beliefs about a brand and the dimensions that underline these perceptions.
- Joiner (1998) explained in his research paper that cognitive network theories assume that the structure of the elicited map reveals the inherent relationships between the associations and the brand as represented in a person’s memory.
- According to the spreading activation theory by Anderson (1983), recall of information is made through the activation of one node and

this activation spreads from that node to other nodes connected to it in memory. The spread of activation depends on the distance and the strengths of the link. Promising in this regard are the existing qualitative mapping techniques, based on cognitive network theory, where attributes are either directly elicited from the consumer (consumer mapping) or produced using analytical methods (analytical mapping). An example is Zaltman Metaphor Elicitation Technique (ZMET) (Zaltman, 1997), which uses multiple verbal and non-verbal qualitative attribute elicitation methods to emphasise subconscious attributes. Quantitative mapping techniques are potentially more effective in this regard.

- Keller (2003 b) states that while qualitative techniques only uncover the types of beliefs making up the brand image, quantitative techniques focus on their contribution to brand equity through measurement of strengths, favourability and uniqueness. Attitudinal research is used widely in marketing, for example in positioning and segmentation studies, advertising evaluation, and image tracking.
- Joyce (1963) explained the various techniques of measuring beliefs about brands. In one distinction, the respondents are asked for an all-or-none response in associating a brand with an attribute or to indicate degrees of belief for finer discrimination. Absolute measures ask about one brand/attribute combination in isolation whereas comparative techniques ask about it in relation to the other brands or attributes. Finally, the respondent may be asked belief questions attribute by attribute (covering all brands for each attribute in turn) or brand by brand (covering all attributes for each brand in turn).
- Haley (1985) and Sudman & Bradburn (1982) described that free-choice questioning is subject to a variable nonresponse effect because the respondent chooses whether or not to indicate his or her beliefs about each brand. In contrast, scaling and ranking are both "forced-choice" procedures that require a definite response for every brand. For respondents unfamiliar with a brand, these procedures can give rise to

errors due to guessing (Hughes, 1969; Morrison, 1979; Schmittlein, 1984; Towriss, 1984). Thus a free-choice approach may underreport the beliefs held by interviewees, whereas forced-choice techniques can add pseudobeliefs to the data. Comparative studies of brand attribute belief measurement have been confined mostly to measures of the degrees-of-association variety, which are essentially forced choice (Albaum, Best, and Hawkins, 1977; Haley and Case, 1979; Hawkins, Albaum, and Best, 1974; Holmes, 1974; Kalwani and Silk, 1982; Kassarian and Nakanishi, 1967; Menezes and Elbert, 1979). One of the key functions of brand management is to be ahead of competitors by imprinting the brand firmly on the consumer psyche and keep it there. A firm therefore requires understanding the consumer perceptions of its brand(s) vis-à-vis those of competitors.

2.9 BRAND RELATIONSHIP MANAGEMENT (BRM)

Nebel Jean Francois and Blattberg C. Robert have discussed brand relationship management as a newly developed holistic approach to retain customers and create brand loyalty. It stands for all activities linked with 'relational exchanges' and 'transactional exchanges'. It helps to establish, maintain and develop the relationship between a brand and its consumers. BRM process focuses on generating trials and repeat purchases and builds high share of requirement (i.e. product's market share for a specific consumer). This results in affinity towards the brand and builds brand relationship. The bond between brand and customer becomes strong and thereby leads to a mutual trust which eventually results in brand loyalty. In order to manage BRM the key steps that need to be taken are:

- Identifying the key driving force of brand preference
- Estimating expected brand utility of consumers
- Analyzing the customer response for each market stimuli
- Grouping target customers into actionable segments based on profitability, usage and characteristics

- Defining offers and corresponding value proposition that meets the identified need. Changing the attitudes and behaviour of customers is at the heart of much of what marketers pursue. Marketing managers try to influence various cognitive, affective and conative predispositions of consumers, and thus buyer behaviour. Consumer attitude measures are the most widely used research technique to evaluate the effectiveness of various change programs.
- Boulding, Kalra & Staelin (1993) suggested that consumers continually update their expectations whenever they receive relevant information about a particular product or service. Because consumer responses are grounded in the socio-cultural context of the respondent, any marketing improvement program can easily lead to a redefinition of the components of its measure.
- Park, Jun and Shocker (1996) & Keller (1993) concluded that customers evaluate brands, develop images of brands, and have varying degrees of loyalty to brands. Consumer-brand relationship is an evolving area of study.
- Studies by Mazursky, LaBarbera and Aiello (1987) concluded that consumers switch brand either due to the extrinsic motives (price, coupons) or intrinsic motives (desire to try out a new brand). They also commented that extrinsic motives to switch are more prevalent amongst the experienced consumers as compared to the consumers with limited purchase experience.
- Jones, Mothersbaugh and Beatty (2000) commented that even with the level of satisfaction, the consumers may change their repurchase decision in the presence of low switching cost and competitor's attractiveness.
- Fournier (1998) expressed that while brands carry a personal meaning to the consumers, there are different identity issues that are salient across income segments, and in fact different patterns of consumer-brand relationships can be identified across different income groups.

Consumers use brands to describe their self-concept as well as to communicate their identity. Their relationship with a particular brand is also based upon their learning. They purchase products that convey meaning as opposed to just the product utility. This is quite different from the earlier times in India, before the “liberalization” of the economy starting from 1991, when products were bought and consumed from a utilitarian standpoint only. Anecdotal evidence suggests that young consumers are very brand-conscious. Indians are no longer in the mind set of collectivism, cautious spending, and guilt associated with spending. Materialism has been greatly increasing amongst the Indian consumers as a way of establishing identity and gaining prestige (Belk, 1988).

- Auty and Elliot (2001) commented that apart from seeing brands as their own extended selves, consumers also consume certain objects to express their affiliation to a particular social group.

2.10 18 BRAND ASTRAS

Jagdeep Kapoor in his book “18 Brand Astras: Using Brand Abilities as weapons for CRISP brand Building”, explains each of the brand abilities in detail. He also explains how they should be used together to form his unique CRISP brand-building module. CRISP is an effective strategy, which covers all the important aspects of brand building and marketing to ensure that any brand is a success. A Brand Health Scan is provided for each of the brand abilities, which explains how his brand measures up to that brand ability. These brand abilities have to be used as brand weapons but not in a disorganized fashion. They have to be used systematically for certain objectives to be met and certain benefits to be accrued to the brand. This organized branding module is called the CRISP branding module which has an organized set of five ingredients which together are required in order to win the minds and hearts of consumers. The acronym CRISP stands for:

- C ---consideration set
- R--- Relationship

- I--- Identity
- S--- Search
- P--- Perceived value

In order to be a winner, the brand must firstly be in the consideration set of the potential customer that he would consider buying. In order to thrive it is essential for brands to build relationships with customers brand managers need to be constantly alert, reinventing the brand in order to fill the need gaps in the market.

2.11 NEW ROLE OF BRAND MANAGER

Modern customer considers himself as an individual with a unique set of characteristics and resents being seen just as a part of the universe. Tremendous sense of freedom and choice has made them more unpredictable in their tastes, preferences and needs. New age customer is empowered with the knowledge of his options. Customers have more information and more choices as a result of higher expectations. Phenomenal changes in demographic, psychographic, geographic aspects and change in the attitude lead to high level of involvement and expectation from products and services. Customers now want companies to provide something beyond high quality products and reliable service. They want more of human dimensions in transactions.

The results of the 2010 Image Power Green Brands survey , conducted across 9000 people in eight countries including the US, the UK, France, Denmark, Australia, China, India and Brazil to understand consumer perceptions of green products speak of the perceptions of the new age consumer. The research conducted by WPP agencies Landor Associates, Cohn & Wolfe and Penn, Schoen & Berland Associates (PSB), as well as independent strategy consulting Esty Environmental Partners, also identifies some critical trends on which consumers are in global agreement.

The results of the survey indicate that while many environmental beliefs and behaviours are shared across different consumer cultures, others vary widely. While economic concerns predominate in most countries consumers in India

and Brazil are more concerned about the environment. Consumers in Brazil, India and China are particularly inclined to seek green products and to favour companies they consider green. The key finding that arose from the study is that concern about the environment has grown over the last year. The study also reveals that consumers feel that companies need to understand and tailor strategies to address local environmental concerns.

With respect to buying brands, it was found that a large majority of Indian consumers find it important to buy from green companies and more than 80% plan to increase their spending on green products next year. As far as buying green products is concerned, a vast majority felt that there was a greater need for variety in the green brands space and that green products are difficult to find. Consumers expect green companies to engage in a broad set of actions, including reducing toxics, recycling and offering green products.

Globally the biggest influencers for purchasing green products are past experience and certification. Most consumers trust green advertising, especially in developing economies – but the French and Germans are more sceptical. Advertising helps consumers make more informed decisions and understand product benefits, in this case. Managers today need to manage the brand across markets and countries in order to gain synergies, efficiencies and coherence. They need to be strategists in assessing a variety of communication vehicles including sponsorship, the web, direct marketing, publicity and promotion. Focus should not only be on short term performance measures such as sales and profits but also on long term brand identity, as what it aspires to stand for, and what it does not want to stand for. All brand decisions should rely on in depth understanding of customer motivations, competitor analysis to create point of differentiation for sustainability over time and company's business strategy. Time tested techniques and methodologies of wooing and retaining customers should be re-examined keeping in mind the emerging dynamics of global business.

2.12 FROM A COMMODITY TO A BRAND: TATA TISCON



Exhibit 2.3: TATA TISCON

In the book titled “Superbrands: An Insight into India’s Strongest Consumer Brands” is a detailed discussion on the brand building story of Tata Tiscon and its journey from a commodity to a well reputed premium selling brand. Tata Tiscon, the rebar brand from Tata Steel, controls about 14% of the market, commanding a 20% price premium. The brand sells through an established network of 31 distributors and 1700 dealers across India. Almost a third of its sales emanate from exclusive counters.

Years ago when the company decided to brand the rebar, it came upon its first challenge: like the nail the rebar was not even in consideration set of most people. It won this battle by simply telling consumers that while cement and concrete were great for buildings it was their reunion with the rebar that kept them standing. Its advertising strategy, encapsulated in the payoff line Atoot Jod (unshakeable bond), showing the visual of a robust cement hand gripping the bar, won it the Gold for the most effective communication in the consumer durables category at the Calcutta Advertising Consumer Connect Awards in 2004/05.

2.13 WHY DO BRANDS FAIL?

Brad VanAuken, Chief Brand Strategist at The Blake Project, renowned for providing consultancy on brand building strategies, identified some common brand problems that cause and/or contribute to brand failure. Some of these common problems as listed in their Branding Strategy Insider are as follows:

- Brands not being able to deliver against the communicated brand promise

- Brands fail when they are unable to link brand planning to the strategic planning of the business as a whole.
- In an attempt to reduce the cost of producing goods or delivering a service, the company compromises with the quality parameters.
- When the rise in the prices of the goods or services offered are increasing at a rate which is higher than inflation, then the customers who formed the low end segment of the brand get neglected and the brand loses out.
- When revenue and profit pressures become so insurmountable that the focus towards brand building activities take a backseat.
- When the brand gets limited to a particular distribution channel or when it is aligned too closely with a declining channel of trade.
- The inability and failure to carry out brand extensions to new product categories leads to brand failures when the core category is in decline.
- In cases where brand managers over extend the brand to different categories and markets there lies a risk of completely blurring the brand's meaning and points of distinction.
- When brand managers fail to apply the latest technology and innovations in their flagship brand thinking that it is a wasteful activity and thus live in a self-fulfilling prophecy, the brands downfall becomes inevitable.
- When brands and sub-brands are created for internal or trade reasons, and fail in addressing distinct consumer needs.
- When the launch of sub-brands reposition the parent brand in a negative light, then it becomes very tough for the flagship brand to survive.
- When brand managers want to increase the market share of the product and mindlessly try to extend it both up to a premium segment and down to a value segment. This leads in diluting the image of the brand.
- When market leaders start following their competitors as they can produce more immediate results by borrowing the ideas of competitors,

then they lose their edge over the competitors and are thus unable to meet consumer needs

- When the brand managers are not abreast with the industry on product or service innovation
- When decisions made by the top management are made without consulting the brand managers or front line employees and senior managers have no clue what the brand stands for.
- Mindlessly licensing the brand name to whomever will pay for it
- Applying branding decisions at the end of the product development process versus treating brand management as the key driver of all of your enterprise's activities
- Confusing brand management with product management (Derrick Daye, 2008).

2.14 MDRA Research on Branded Petrol

Marketing & Development Research Associates (MDRA) based in Delhi had conducted a survey in 2003 on consumer preference and perception of branded petrol. Over 336 interviews were conducted in Mumbai and Delhi with car, motorcycle and scooter owners. Vehicle owners were quizzed on brand recall, customer perception, usage patterns and the initiatives taken towards building loyalty. The interviewees were divided into four categories:

1. Vehicle owners aware of branded fuel and using it;
2. Those who are aware of branded fuel but are not users;
3. Those who have stopped using the fuel; and
4. Those unaware of branded fuel.

In an effort to avoid any likely bias, respondents were especially not contacted at or outside petrol pumps; instead, they were approached at parking lots, at their homes, and at cinema halls and shopping complexes. A little over 43 per cent of those polled use branded fuel; just 14 per cent did not know about branded fuel. Significantly, 26 per cent of vehicle owners knew about branded fuel but had not tried it. BPCL's Speed, at 67% of the users, was the winner by a long margin. Indian Oil Corporation's Premium found fewer takers (39%), in

spite of a larger network and more retail outlets in Delhi and Mumbai. The user figures for Power (HPCL) and Josh (IBP) were also similar: 31% and 25%, respectively. Speed came out tops in trial purchases as well: close to 69 per cent of the users had tried the brand, compared with 23% for Power and 16.7% for Premium. When it came to unaided recalling of brand names, at 68%, Power was top-of-mind with branded fuel users; the aided recall of Speed was the highest among regular petrol users. It scored the highest points on all five specs: improved mileage, easy starting the vehicle, maximum power to vehicle, lowered vehicle maintenance and smooth running. Not everybody was so pleased with branded petrol. Over 16% of the vehicle owners polled had tried the new, improved petrol, but later stopped. The most frequently cited reason for reverting to regular petrol was the price: close to 32% felt branded fuels were too expensive. Not perceiving any difference between branded and regular petrol (15%); lack of availability (15%), and poor fuel average (19%), were among the other reasons for discontinuing branded petrol. Only 23% said they would be willing to give branded fuel a second chance.

An important finding of the survey related to the willingness to try the new petrol: 40 per cent of the respondents were willing to try branded fuel. More than 13 per cent felt that branded petrol would make the engine more efficient. Mileage, in fact, was the key trigger for all users of branded petrol. 96% of the interviewees looked forward to greater mileage from branded petrol, followed by 80% who expected enhanced engine performance, and hence smoother ride. On average, most vehicle owners had been using branded fuel for nine weeks and nearly 90% expressed that they would continue buying it. Just over 83% declared themselves “very satisfied” with performance of the powered petrol and more than 95% were willing to recommend it to friends and families.

A research paper by P. Kumar and A. Sahay titled “Retailing At Petrol Pumps : From Commodity Dispensing to Customer Service” published in Journal of service research in 2004 concluded based on the research conducted in Delhi, that service concept at petrol stations was practically absent. If some stations

provided service, the same was designed without any interaction with the customer. The research also pointed out that the customers were dissatisfied when relating to elements of products and services at petrol pumps (such as quantity, quality and people) and rated these facilities as the worst facilities at the petrol stations. As regards to elements like process, ambience and queue there was no dissatisfaction conveyed by the respondents. The customers also gave little importance to availability of fast food facilities and such facilities if present were not valued by the customers at the retail outlets. When customer expectations of products and services at petrol pump stations were sought, it was observed that customers had highest expectations for reliability of quantity and quality of fuel followed by the supporting facilities and then the ambience.

Although research has been done on customer awareness and usage of branded fuels by MDRA and on service elements by Kumar and Sahay, no research has been carried out to study customer based brand equity to understand the perceived quality, brand loyalty, brand awareness and brand association of the customers with the public sector oil marketing companies. The researcher has therefore carried out study to understand each element of customer based brand equity. The researcher has also tried to carry out a comparative study of the brand building activities carried out by public sector oil marketing companies vis a vis the international oil marketing companies operating outside India. Such a comparative study would help in understanding the global brand building activities and provide valuable insights that could serve as guidelines for improvisation in the Indian context.

CHAPTER-3

RESEARCH METHODOLOGY

Content	Page No.
3.1 Objectives of the Study	67
3.2 Hypothesis	68
3.3 Research Methodology	70

CHAPTER 3

RESEARCH METHODOLOGY

INTRODUCTION

This chapter is concerned with highlighting the objectives of the research and the hypothesis developed for studying each objective framed for the research. The research methodology adopted for achievement of the objective(s) of the study undertaken is then explained followed by an explanation of the research design, the sampling process and selection procedure of the sample. It further explains procedure of data collection and development of questionnaire and then concludes with explanation of the procedure of analysis and presentation and discussing the limitation of the study with scope for further research.

3.1 OBJECTIVES OF THE STUDY

In order to study Customer Based Brand Equity one needs to study brand awareness and loyalty expressed by the customers, their association with the brand values and their perception of brand quality. Lot of marketing efforts has been put forth by each oil marketing company to increase the level of brand loyalty and awareness amongst the customers. The oil marketing companies introduced branded auto-fuel, convenience stores and loyalty cards etc. to differentiate themselves in the market place. Each of the oil marketing company also claim to be known for certain values amongst the customers, for example HPCL claims to be known for High Quality, Personalised Vehicle Care and Customer Care; BPCL claims to be known for Innovation, Care and Reliable (abbreviated as InCaRe in company literature) and finally IOCL claims to be known for Care, Innovation, Passion and Trust (abbreviated as

CIPT in company literature). A study to assess the level of customer awareness and agreement with each of these brand values of the oil marketing company would help understand the customer association levels with these companies. In order to understand the customer based brand equity of the oil marketing companies, an understanding of perceived quality of fuel and their brand loyalty for these companies also needs to be studied. A study of the strategies deployed by the International oil companies operating outside India would further give valuable insights into the brand building activities followed by global companies and this would help Indian oil marketing companies to identify the areas where the work needs to be done in terms of brand building to enhance customer based brand equity. The objectives thus framed for this research are as follows:

- To study the brand awareness levels of the customers for the public sector oil marketing companies.
- To study the perception of quality by the customers for petrol marketed by the public sector oil marketing companies.
- To study the level of association of the customers with the brand values of each of the public sector oil marketing company.
- To study the level of customer loyalty for each of the public sector oil marketing company.

3.2 HYPOTHESIS

Since HPCL, BPCL and IOCL are all public sector oil marketing companies dealing in the same product category and having identical prices for the product and almost the same format of brand building activities, it is assumed that they would be positioned equally in the customer's mind and there would not be any significant difference in the level of brand awareness exhibited by the customers for these companies. The brand building initiatives have been for the masses and no specific income group seems to be targeted through the marketing communication and promotional campaigns. Based on the above

assumptions the first hypothesis formulated for statistical testing is for studying the awareness level of the respondents for each of the OMC.

Hypothesis 1

H₀: There is no significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies.

H₁: There is a significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies.

The brand image formed in the customers mind is a result of perception of quality of the products offered by the company. Since petrol as a product is an un-differentiable commodity, the oil marketing companies have been on a spree to improve the appearance of their outlets that are not just attractive and serve as branding tools for the company but also serve as quality cue to the customers. The customer's acquaintance with the dealer or dealer staff also works as a signal of purity and quality of product offered at the retail outlet. Hypothesis 2 was developed to statistically test the difference in the perceived quality by the customers for the petrol marketed by these oil marketing companies (under the assumption that retail outlet and dealer acquaintance also act as quality cues for petrol purchased by the customer) .

Hypothesis 2

H₀: There is no significant difference in the perceived quality of the petrol marketed by public sector oil marketing companies

H₁: There is a significant difference in the perceived quality of the petrol marketed by public sector oil marketing companies

Post 2002 each of the oil marketing company has utilized advertising campaigns and brand promotions enhanced by brand ambassadors to create differentiation, enhance visibility and communicate their brand values to the customers. Since product differentiation is hard to communicate to the customers hence each of the oil marketing company started to differentiate themselves much through the services surrounding the product. Any disconnect between the brand promise and customer satisfaction risks eroding

the value of the brand. Hence the third hypothesis was developed for statistical testing of brand association levels of the customers with each of these companies.

Hypothesis 3

H₀: There is no significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies.

H₁: There is a significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies.

Consumers generally prefer to patronize an outlet that is easily accessible either near his residence or enroute his place of work. In view of such a purchase behaviour exhibited by the customers the fourth hypothesis was developed to statistically test the level of brand loyalty exhibited by the customers.

Hypothesis 4

H₀: There is no significant difference in the level of customer brand loyalty for the public sector oil marketing companies

H₁: There is a significant difference in the level of customer brand loyalty for the public sector oil marketing companies

3.3 RESEARCH METHODOLOGY

The research methodology used by the researcher is divided into subsections which highlight the scope of the research carried out, calculation of sample size and the methodology used to measure the research constructs.

3.3.1 SCOPE OF RESEARCH

Although the need is to study the brand building activities of all the Oil Marketing Companies in India across all states but due to constraints on time, financial and physical resources, the researcher has scaled down the scope of research in terms of (a) geographical spread and (b) products marketed by the Oil Marketing Companies. As far as geographical spread is concerned the city

of Indore in Madhya Pradesh has been selected. In product category the focus has been kept on marketing of Petrol.

3.3.1 (a) The Basis for Selection of Petrol

Table 3.1 depicts the consumption volume of petrol and diesel in Madhya Pradesh. Since diesel is mostly consumed by heavy commercial vehicles, agricultural equipment, industries, transportation sector etc. and there is lesser consumption of diesel for non- commercial vehicles when compared to petrol consumption, the researcher has exempted the study on diesel. With this background the researcher has limited the study to the consumers of petrol.

Table 3.1: Consumption of Petrol and Diesel in Madhya Pradesh

Consumption of Petrol and Diesel in Madhya Pradesh ('000tons)					
Year	Mar-06	Mar-07	Mar-08	Mar-09	Mar-10
Motor gasoline	318	338	393	493	638
High speed diesel oil	1381	1504	1774	2182	2731
Light diesel oil	20	17	19	26	38

Source: CMIE, 2010

3.3.1 (b) The Basis for Selection of Indore

Table 3.2 depicts the average monthly expenditure on petrol per household in different regions of Madhya Pradesh and points towards the highest household consumption for petrol in the Malwa (Indore) region.

Table 3.2: Average Monthly Expenditure on Petrol per Household

Regions of Madhya Pradesh	Average monthly expenditure on petrol per household (in Rs.)
Bundelkhand	400-600
Malwa (Indore)	above 1400
Baghelkhand	800-1000
Mahakaushal	1000- 1200
Neemar	Less than 400
Gondwana	600-800

Source: Consumer Pyramids, CMIE, 2010

The selection of Indore as sample is further based on the following reasoning:

- Contribution to GDP

It is fair to assume that growth in income has high positive correlation with demand for petroleum products. Hence the researcher considered the top 10 states, according to their contribution to the country's GDP, as the reference list for choosing the city for conduct of the survey. Madhya Pradesh occupies the 10th position in terms of its contribution towards the country's GDP (refer to table 3.3)

Table 3.3: State wise Percentage Contribution to Country's GDP

S.No.	State/UT	%Contribution towards GDP
1	Maharashtra	14.46
2	Uttar Pradesh	8.34
3	Andhra Pradesh	7.63
4	Tamil Nadu	7.45
5	Gujarat	6.89
6	West Bengal	6.43
7	Karnataka	5.39
8	Rajasthan	4.1
9	Kerala	3.7
10	Madhya Pradesh	3.48

Source: VMW Analytic Services, 2010

- Number of Retail Outlets of Oil Marketing Companies

Out of the 10 states in Table 3.3 the state of Madhya Pradesh exhibited the highest increase (7.33%) in the commissioning of retail outlets by the companies between the years 2009-2010 (Table 3.4). Indore being the industrial capital of Madhya Pradesh and also being the largest city in the state thus becomes a logical choice for conducting the survey.

Table 3.4: State wise and Company wise Retail Outlets

State/UT	IOCL	HPCL	BPCL	Total as on 1.4.2010	Total as on 1.4.2009	YOY Increase	Percentage increase in retail outlets
Maharashtra	1289	938	1077	3304	3166	138.00	4.36%
Uttar Pradesh	2453	1000	942	4395	4239	156.00	3.68%
Andhra Pradesh	1439	881	749	3069	2913	156.00	5.36%
Tamil Nadu	1481	807	830	3118	2961	157.00	5.30%
Gujarat	941	442	454	1837	1774	63.00	3.55%
West Bengal	925	393	419	1737	1728	9.00	0.52%
Karnataka	1203	625	554	2382	2246	136.00	6.06%
Rajasthan	1154	697	565	2416	2333	83.00	3.56%
Kerala	761	507	400	1668	1629	39.00	2.39%
Madhya Pradesh	835	413	508	1756	1636	120.00	7.33%

Source: (MoPNG, Public Sector Undertakings); VMW Analytics services

The vehicle population in Indore is also exhibiting an upward trend as can be seen in Table 3.5 which depicts that there is a high YOY increase in the number of 2 wheelers and 4 wheelers in Madhya Pradesh.

Table 3.5: Vehicle Population: Madhya Pradesh

Vehicle Population: Madhya Pradesh (in numbers)				
Year	Two wheelers registered	Cars registered	Jeeps registered	All transport motor vehicles
Year	Numbers	Numbers	Numbers	Numbers
Mar-01	2357303	117155	38790	3094428
Mar-02	2369734	124555	34329	3172947
Mar-03	2600989	134045	35111	3458988
Mar-04	2876191	148030	36282	3803528
Mar-05	3176549	166393	37704	4187973
Mar-06	3526416	185700	38291	4608627
Mar-07	3895557	208052	37449	5047093
Mar-08	4292649	237022	38181	5523458
Mar-09	4691218	272009	39652	6010691
% YOY increase or decrease	9.28%(+)	14.76%(+)	3.85%(+)	8.82%(+)

Source: CMIE; Motor Transport Statistics of Madhya Pradesh, Govt. of Madhya Pradesh

There has been the highest growth (14.76%) in the number of cars registered in 2009 as compared to 2008 (refer to table 3.5). Besides, Indore being the industrial capital of the state has a larger concentration of vehicular population and can thus serve as a good area to carry out this research.

With this backdrop the researcher has limited the study to the city of Indore in Madhya Pradesh to understand the consumer brand knowledge of Oil Marketing Companies in general and for petrol brands in particular (excluding Diesel, CNG and other auto fuels).

3.3.2 CALCULATION OF SAMPLE SIZE

The sample size was calculated through the formula:

$N = (Zs/e)^2$ where

- N= sample size
- Z= Represents the Z score from the standard normal distribution for the confidence level desired by the researcher. A 95% confidence level would indicate (from a standard normal distribution for a two sided probability value of 0.95) a z score of 1.96. The Z value of 1.96, equivalent to 95% confidence level, was used for the research.
- “S” Represents the population standard deviation for the variable which is to be measured from the study. This is an unknown quantity since while deciding on the sample size, no sample had been taken. However a preliminary study was conducted to understand the customer awareness and perception of the brand building activities by Oil Marketing Companies in India. 74 customers were presented with a preliminary questionnaire to identify their consumption pattern of petrol. Care was taken that customers are not approached at petroleum retail outlet to prevent biased responses. The population standard deviation calculated from this preliminary research was 0.503. Thus $s=0.503$ was used for calculating the sample size.

- The third value required for the study is “e”, called the tolerable error in estimating the variable in question. An error of 5% was considered as tolerable error for the study. Therefore $e=.05$
- Therefore the sample size to be studied was calculated as follows:

$$N = (Zs/e)^2$$

$$N = (1.96 \times 0.503/0.05)^2$$

$$N = 388.78$$

To further reduce the error margin a sample of 400 respondents was targeted for the study.

3.3.3 METHODOLOGY TO MEASURE RESEARCH CONSTRUCTS

Customer brand knowledge is studied in terms of the position that the brand occupies in the customer’s mind, the level of association with the brand values, the brand awareness and the degree of brand loyalty expressed by the customer. Following methodology was followed to quantitatively measure the components of customer brand knowledge:

Brand Awareness: Brand awareness can be a sign of quality and commitment, letting consumers become familiar with a brand and helping them consider it at the point of purchase (Aaker, 1991). Brand awareness is essential for the communications process to occur as it precedes all other steps in the process. In memory theory, brand awareness is positioned as a vital first step in building the “bundle” of associations which are attached to the brand in memory. Brand awareness is a factor contributing to brand equity. In other words the customer should be able identify a firm’s product amongst others present in the same category. Technically brand awareness consists of brand recognition and brand recall. At the top end of this continuum is the brand that exists at the top of the customer’s mind. The next level is of all the other brands that are recalled by the customer in an unaided form. Brand recognition is the level where the customers are aided in recalling or recognizing brands or sub brands. In a situation where the consumer is aware of a number of brands which fit the relevant criteria, he or she is unlikely to expend much effort in seeking out information on unfamiliar brands. A brand that has some level of brand awareness is far more likely to be considered, and therefore chosen, than

the brand which the consumer is unaware of. It has been established through studies that higher the position of the brand in the consumer's mind measured by unaided recall, the higher the purchase intention and the higher the relative purchase of the brand (Kapoor Srikant, 2009).



Exhibit 3.1: The awareness continuum & Brand Equity

Scott M. Davis, (2002) in his book Brand Asset Management mentions that a strong brand position means the brand has unique, credible, sustainable and valued place in the customer's mind. It revolves around a benefit that helps your product or service to stand apart from the competition. In the increasing clutter of brands, in virtually every product category, marketers are finding it difficult to create a distinct place for their brands. One of the most important brand management activities is positioning the brand properly where marketers try to create an image or identity in the minds of their target market for its product, brand or organisation. Thus positioning is something (perception) in the minds of the target market. This positioning as the name implies involves identifying the optional location of a brand and its competitors in the minds of the consumers to maximise potential benefit to the firm. When a respondent to market research studies is asked to name a brand (or company) for a particular product category then the first name that is taken by the respondent is the measure of the brand position in his/her mind. Although the respondent may be aware of many other brands/ companies for

the mentioned product category, but the fact that he/she responds with a particular brand name as a response to the query put forth by the interviewer reflects that the brand mentioned enjoys a higher position in the mind of the respondent as compared to other brands. Since ‘position’ of a brand is its perception among target consumers, all the companies try to identify Unique selling Propositions (USPs) so that they can do effective positioning for a place in the consumer’s mind (Sengupta Subroto, 2005)

The researcher has studied the top of the mind awareness by asking the respondent to name the company that sells petrol (Question 8 in questionnaire, Appendix 1). The first name that is taken by the respondent is the measure of the brand position in his/her mind. Although the respondent may be aware of many other companies which sell petrol, but the fact that he/she responds with a particular brand name as a response to the query put forth by the researcher would reflect that the brand mentioned enjoys a higher position in the mind of the respondent as compared to other brands.

Brand Awareness is further measured through customer recognition of the marketing communication messages/ punch lines (question 16 in questionnaire, Appendix 1) and also linking up the sub brands (like branded petrol, convenience store, loyalty cards etc.) with the Oil Marketing Companies (question 18 in questionnaire, Appendix 1). Brand recall reflects the ability of consumers to retrieve the brand from memory when given the product category and this reflects the ability of consumers to confirm prior exposure to the brand. Hence the method of aided brand recall is employed for measuring the brand awareness.

Perceived quality: Perceived quality is the “core/primary” facet across the Customer Based Brand Equity (CBBE) framework (Aaker, 1996; Farquhar, 1989). It is not the real quality of the product but the customer’s perception of the overall quality or superiority of the product (or service) with respect to its intended purpose, relative to alternatives (Zeithaml, 1988). Perceived quality lends value to a brand in several ways: high quality gives consumers a good reason to buy the brand and allows the brand to differentiate itself from its

competitors, to charge a premium price, and to have a strong basis for the brand extension (Aaker, 1991). The researcher has studied the perceived quality of the products of the Public Sector Oil Marketing Companies by constructing a five point likert scale ranging from superior quality to worst quality and the respondent is asked to state their feeling about the quality of petrol and non-fuel services offered by these companies (question 9, 10, 11 & 12 in questionnaire, Appendix 1)

Brand Association: Brand association is anything "linked" in memory to a brand like reliable, quality, stylish, price, durable etc. (Aaker, 1991). It is believed to contain the meaning of the brand for consumers. Brand association can be seen in all forms and reflects features of the product or aspects independent of the product itself (Chen, 2008). A set of associations, usually organized in some meaningful way, forms a brand image. Brand associations create value for the firm and its customers by helping to process/retrieve information, differentiate the brand, create positive attitudes or feelings, provide a reason to buy and provide a basis for extensions (Aaker, 1991). Customer-based brand equity occurs when consumers have a high level of awareness and hold some strong, favourable, and unique brand associations in their memories. All brands come to acquire a meaning in the memory of the customer and customer associates different elements of the product like its use, personality, colour, use situation to the brand etc. Based on these associations, customer creates an image of the brand that leads to creating different position in the mind of the customers and further help in creating an appropriate brand image. These brand associations helps to build brand equity by helping a customer to process and quickly retrieve product information. The brand position is based upon associations and how they differ from the competition. One of the key functions of brand management is to be ahead of competitors by imprinting the brand firmly on the consumer psyche and keep it there (Porter S. Stephen and Claycomb Cindy, 2000). A firm therefore requires understanding the consumer perceptions of its brand(s) vis-à-vis those of competitors. This calls for the measurement of brand associations.

Projective techniques and Scaling techniques are two commonly used methods to measure brand association.

Projective techniques involve focusing on a discussion upon the use experience, the decision process, or off the wall perspectives such as considering the brand to be a person or an animal. Another characteristic of projection research is the use of ambiguous stimuli wherein there is freedom to project experiences, attitudes and perceptions. The commonly used methods are picture completion, sentence completion and story completion.

Scaling techniques, according to Aaker, are much more objective and reliable than qualitative approaches since they are less vulnerable to subjective interpretation. Scaling consumer perceptions involves the determination of perceptual dimensions, identification of target segment and the interpretation of the brand profiles. The perceptual dimensions may include the product attributes and benefits, user of the brand or relevant competitors. Scaling methods that marketers have utilized include semantic differential scale, Likert scale etc. (Aaker and Joachimsthaler, 2000)

Each of the Public Sector Unit Oil Marketing Company claims in their literature that all their activities are focused towards exhibiting certain brand values for which they are known or aspire to be known in the market place. For example HPCL claims to be known for High Quality, Personalised Vehicle care and Personalised Customer care; BPCL for Innovation, Care and Reliability (abbreviated in company literature as InCaRe); and IOCL for Care, Innovation, Passion and Trust (abbreviated in company literature as CIPT).

The researcher has studied Brand Association by using Scaling technique as it is much more objective and reliable than Projective techniques employed for the same. The level of customer association with the brand values of the Public Sector Unit Oil Marketing Companies as communicated in their literature is assessed using a five point Likert scale where the customer response ranges from strongly agreeing with the brand value to strongly disagreeing with the same (Question 17 in questionnaire, Appendix 1).

Brand loyalty: Brand loyalty is at the heart of brand equity. From a behavioural perspective, it is defined as the degree to which a buying unit, such as a household, concentrates its purchases over time on a particular brand within a product category (Schoell and Gultinan, 1990). From an attitudinal perspective, brand loyalty is defined as “the tendency to be loyal to a focal brand as demonstrated by the intention to buy it as a primary choice” (Oliver, 1997). According to Aaker (1991), brand loyalty adds considerable value to a brand and/or its firm because it provides a set of habitual buyers for a long period of time. Loyal customers are less likely to switch to a competitor solely because of price; they also make more frequent purchases than comparable non-loyal customers (Bowen and Shoemaker, 1998). Jeau Noel Kaplerer has differentiated between two categories of brand loyals i.e. Pseudo-loyals and Committed loyals. Pseudo-loyals are the customers who go for repeat purchase of a particular brand but do not have strong attitudes towards the brand. They may buy the brand because of its price sensitivity or availability of a brand. Committed loyals also known as active loyals are the customers who will only purchase one particular brand.

The researcher has studied Brand Loyalty through a five point likert scale ranging from “only purchase from this company” on one end and “never purchase from this company” on the other end of the scale (Question 13 in questionnaire, Appendix 1). The consistent repeat purchase is one kind of ‘Loyalty-Prone’ behaviour which forms the base for brand loyalty. The strength of behavioural brand loyalty is therefore directly a function of the repetitive occurrence of purchase or consumption behaviour. The qualitative response of the respondent towards the reasons for visiting a particular petrol pump (Question 14 & 15 in questionnaire, Appendix 1) would help in analysing the level of loyalty expressed by the customers i.e. whether they are pseudo-loyals or committed loyals.

3.3.4 NATURE OF THE STUDY

The study was sequential in nature which involved conducting a preliminary survey to broadly understand the consumer behavior. For this purpose 74

customers, 47 dealers (Appendix 2) and 6 company officials (Appendix 3) were surveyed to collect quantitative as well as qualitative data. The insights gained from this preliminary survey helped in framing the final questionnaire for the research to be conducted. Also from this preliminary survey on consumers, the standard deviation figures for the sample were arrived at, which were used in calculating the sample size to be finally studied.

Secondary data from the published sources on the international oil companies and those operating in India was collected to understand the brand building activities followed till date. Various journals on brand management, consumer behavior, services marketing and oil and gas were referred to for literature review. The resources of e-libray like Proquest, Harvard Business Review and Ebsco were used to gain insight into the research papers published on the fuel branding in particular and branding in general. Data was also collected from CMIE (Centre for Monitoring Indian Economy) to gain insight into the oil companies operating in India.

Research was conducted using quantitative techniques. The customer target population has been defined as the people who drive cars or motorcycles/scooters on the roads of Indore. Care was taken not to approach the respondents at the retail outlets of the petroleum companies so that the responses are unbiased. Stratified probability sampling method was used for customer selection. The demographic variables were taken into account for better representation of sample.

According to the statistical figures obtained from the Centre for Monitoring Indian Economy (CMIE) and website of indiastats.com about the per capita income of Madhya Pradesh, the city of Indore was broadly divided into three zones to study the customer based brand equity for the public sector oil marketing companies.

- The area in and around Vijaynagar with a population of around 1,98,000 residents represents the high income group (with family income above Rs. 1,00,000/-pm) as this area is characterized by high

rise residential apartments, shopping malls, multiplexes and two premium hotels of Raddisson and Saya Ji.

- The two areas in and around Palasia and Geeta Bhavan with a population of around 1,68,000 residents represents the middle income group (family income between Rs.50,000- 1,00,000/- pm) and is characterized by individual houses, commercial area comprising of mom and pop stores and few shopping complexes which cater to the middle income group. This area also has coaching centres where students come for their coaching of competitive exams.
- The area in and around LIG colony with a population of around 2,00,000 residents was chosen to represent the low income bracket of the society (with family income being less than Rs. 50,000/- pm). This area is characterized by small independent houses and only mom and pop stores with no high rise apartments and prominent vegetable wholesale and retail markets in the proximity (Indore Development Authority, available at www.idaindore.org).

In view of the exploratory nature of the study and to enhance the data collection, prior to conducting the pilot studies, the initial questionnaire received extensive reviews and suggestions from four senior academicians with expertise on the subject matter. To ensure "respondent-friendly" structured questionnaire, it was pilot tested with 10 academicians and 20 customers before commencing the actual study. The sample size of about 400 customers was targeted for the survey. About 25 responses were discarded due to incomplete filling of questionnaire and the analysis was done on the remaining 375 responses. The primary data collected is analyzed using SPSS 17.0 (Statistical Package for Social Sciences).

CHAPTER-4

OVERVIEW OF BRAND BUILDING ACTIVITIES OF OMCs IN INDIA

Content	Page No.
4.1 Brand Building Efforts of IOCL	84
4.2 Brand Building Efforts of BPCL	88
4.3 Brand Building Efforts of HPCL	93
4.4 Snapshot of Brand Building Activities of OMCs	98

CHAPTER 4

OVERVIEW OF BRAND BUILDING ACTIVITIES OF OMCs IN INDIA

INTRODUCTION: COMPETITIVE LANDSCAPE

The Indian petroleum retail market is undergoing metamorphosis. Intense competition has set in due to the reforms carried out in pursuance to the policy of liberalisation which has resulted in the entry of private players in petroleum sector. The existing players had started giving importance to customer's needs and wants as a response to the changing business dynamics. Customer Relationship has, thus, emerged as a virtue to them. The petroleum retail format has evolved over years and focus has shifted from just dispensing fuel to servicing the customer base to build strong brands in customers' mind. With increased number of government approvals for the retail outlets, the brand war is spreading to petrol pump stations. The market is becoming global and more competitive. As a result, the industry is carrying out structural changes across the board (Attri, Pahwa & Urkude, 2011). Most of the players are employing strategies like enhancing scale of operation, better supply chain management, upgrading processing facilities, strengthening marketing network, etc. These developments empower customers and shift the balance of power towards them. In this changing business environment, customer satisfaction has become the ultimate goal for marketers. The marketing strategy of companies is becoming customer centric. High customer satisfaction is most likely to result in high customer loyalty, which, in turn, increases the likelihood that the customer would repurchase the company's products. This chapter is dedicated to the brand building activities deployed by public sector oil marketing companies in India i.e. HPCL, BPCL and IOCL.

4.1 BRAND BUILDING EFFORTS BY INDIAN OIL CORPORATION LTD.(IOCL)

Indian Oil Corporation Limited, India's flagship oil company is engaged in hydrocarbon business of refining, pipeline transportation and marketing of petroleum products. It is also engaged in the exploration & production of crude oil & gas and markets natural gas and petrochemicals. It proudly occupies the highest rank amongst the Indian corporates in the Fortune 'Global 500' listing. IOCL was ranked at the 98th position in the year 2011. Indian Oil Corporation Limited is highly customer oriented and has focused its marketing efforts in developing a vast network of retail outlets across urban and rural India. The retail outlets of IOCL comprise 46.4% of the total retail outlets present in the country and this includes 3517 Kisan Seva Kendras (KSKs) in the rural markets. Till October 2011, the company had a countrywide network of 36,900 retail outlets, about 140 bulk storage terminals and depots across the country for supply of the fuel and had 3,960 SKO/LDO dealers (60% of the industry) (www.iocl.com). The following section highlights some of the brand building activities undertaken by the company.

4.1.1 RETAIL OUTLETS (IOCL)

The company launched brands of fuel and services to cater to different customer segments. XTRACARE retail outlets were set up for select urban and semi-urban markets. For highway motorists, it launched large format Swagat brand outlets and Kisan Seva Kendra's for the rural markets (see Exhibit 4.1 (a) and (b))



Exhibit 4.1(a): Urban Retail outlets of IOCL



Exhibit 4.1(b): Rural Retail outlets of IOCL

4.1.2 LOYALTY CARDS (IOCL)

The **XTRAPOWER Fleet Card** program started by IOCL aimed at assisting the fleet owners in effectively managing their fleet of vehicles. Using these pre-paid fleet cards which also came with limited credit facilities provided by Sundaram Finance Limited, the fleet operators and corporate clients of IOCL could purchase fuel and lubes on a cashless basis. This greatly saved the fleet owners from the hassles of tracking the amount of money spent by the drivers on refuelling the vehicle as with the fleet cards either the drivers paid through pre-paid cards or the amount for which the fuel or lubes were purchased was reflected in the statements of the credit cards. An added advantage of the fleet card program was that exciting rewards could be won when payment was made using these cards. Unique benefits like personal accident insurance cover and vehicle tracking facilities were also some features which provided added benefits to the fleet owners upon the use of these cards. XTRA Points are earned every time on use of XTRAPOWER fleet card(s) for making purchases of auto fuels & lubricants, and the fleet owners can redeem the points for fuel, lubricants or exciting gifts. XTRA Protection through XTRAPOWER

insurance cover is provided for Personal Accident, Medi-claim and lost card liability.



Exhibit 4.2: Loyalty cards of IOCL

Indian Oil initiated the **XTRAREWARDS**- an online rewards based loyalty programme for individual customers in India and wanted to inculcate the habit of redeeming points. This loyalty program provided a chance to all the customers irrespective of their mode of payment for the fuel to win exciting rewards. This loyalty programme offered an opportunity to earn points on fuel/lube purchases at Indian Oil retail outlets as each transaction is confirmed online through a charge slip. The customers also were provided with an opportunity to redeem the earned points outside the Indian Oil network which included prominent FMCG outlets, Food joints, Automobile (accessories / workshops), Travel, Entertainment, Apparel and Hospitality sectors.

4.1.3 E- INITIATIVES (IOCL)

IOCL made its presence felt in 2004 by advertising through banners and contests on the website Indiatimes.com and received a huge number of clicks per day which is clearly indicative of the interest they generated amongst the consumer through this platform.



Exhibit 4.3: Indian Oil on Indiatimes.com (generated 9200 clicks in a day)
Source: Indiatimes.com ; July 17th, 2004.

4.1.4 CONVENIENCE STORES (IOCL)

Indian Oil Corporation (IOC) took the convenience store initiative in February 2010, where the convenience stores would be open for 24 hours to cater to the needs of the customers. This initiative was planned by the company to enter the organized retail sector which could be complemented by the already very strong and largest retail network of the company in the country. The oil company entered into a pact with K.K. Modi's Godfrey Phillips for opening such C-stores in northern India. The company has had numerous individual tie ups with banks, mobile operators and well established chains of restaurants in different parts of the country. In the initial plans of the company, 100 such C-stores were proposed to be operational in major cities of North India. The company also has plans for similar tie-ups with other retail chains for other regions of the country. These stores were proposed to stock a range of consumer goods like packaged ready to eat food, music, newsprint, magazines etc.

4.1.5 PROMOTION CAMPAIGNS (IOCL)

IOCL launched the 'Saal Bhar Free Fuel' offer on the purchase of branded fuels, XTRAPREMIUM, XTRAMILE and Autogas from IndianOil outlets in September 2009. The prizes were delivered in the form of Fuel Vouchers that

could be redeemed at IndianOil fuel stations for XTRAPREMIUM, XTRAMILE or Autogas only.

The ‘Car in A Tank’ offer which commenced in February 2009 and ended on the 30th of April 2009 was a brand activation campaign to prompt the customers of Indian Oil to fill fuel with higher octane and additives (i.e. Xtrapremium petrol and Xtramile diesel). This scheme was open to all Indian Oil customers who purchased fuel amounting to Rs 300/- or more.

The exciting prizes included a Maruti Suzuki SX4, 4 Nos. Maruti Suzuki A-Stars and 8 Nos. Maruti 800 DUOs, in addition to 500 Nos. iPods and 1000 Nos. gift vouchers worth Rs 500.00 each. A huge amount of excitement was generated through this customer activation programme run in selected cities and helped the company to establish some amount of customer connect.



Exhibit 4.4: Winners of “Car in a tank offer”

4.2 BRAND BUILDING EFFORTS BY BHARAT PETROLEUM CORPORATION LTD. (BPCL)

Bharat Petroleum Corporation Limited is a public sector unit of the country having a Navratna status and is ranked at 287th position in the fortune 500 list. Like IOCL, this company too has forayed into exploration, refining and marketing of fuel. The core strength of BPCL has been its pursuit for

qualitative excellence and achieving maximization of customer satisfaction. Brand Management team at Bharat Petroleum endeavors to build and manage a strong brand image reflecting Bharat Petroleum's core values of being 'INCARE', viz. **IN**novative, **CA**ring and **RE**liable. With the launch of **Speed** (petrol with fuel additives), BPCL was the first oil company in India to sell a premium product, priced marginally above the ordinary petrol, in mid-2002.

4.2.1 LOYALTY CARDS (BPCL)

BPCL undertook loyalty card initiatives such as **PetroCard** in 1999 for individual customers and **Smartfleet card** in 2001 for the fleet owners. With the PetroCard programme, BPCL aimed to achieve the dual objectives of building loyalty and establish direct contact with the customers. PetroCard was prepaid debit card and could be used to fill in fuel from any BPCL outlet in the country. A customer could join the loyalty programme by making a one time payment of INR 250. On joining he was issued PetroCard and fuel worth a minimum of INR 500 could be 'loaded' each time onto the card. The card could then be used to fill in fuel until the amount was exhausted. Almost all the retail outlets of Bharat Petroleum accept Debit & Credit cards today to make the purchase of the fuel convenient for the customers. In addition there is a waiver of the fuel surcharge on HDFC Bank and SBI Debit Cards, Standard Chartered Bank Credit Cards and Smart Fill Debit Cards and also HSBC Credit Cards.



Exhibit 4.5: Loyalty cards of BPCL

On the lines of PetroCard, BPCL started a loyalty programme called “SmartFleet” targeted at Fleet owners and corporate customers, and was launched in association with Tata Finance Ltd. (TFL). The fleet card not only allowed the corporate customers to preload cash on the card, but also offered a credit facility through TFL to BPCL as a whole. The card could be used by drivers for paying for fuel and lubricants at designated BPCL SmartFleet outlets. The major benefits of the SmartFleet programme were that MIS reports regarding vehicle –wise spends on fuel and lubricants, vehicle usage, the distance logged and fuel efficiency, tracking of vehicle etc. could be generated. Other benefits of the card include asset insurance, health check-up, discounts and rewards redeemed against loyalty points earned using the card. BPCL also ran promotional schemes under which PetroCard users were given higher bonus points. Consumers could also avail themselves of a 5% discount by using the PetroCard to shop at “In & Out” convenience stores of BPCL. Each time the card was used to fill in fuel, the consumer got bonus points or “petro miles” which he could exchange for attractive gifts. BPCL had provided “Card Reader Machines” at almost 70% of its outlets across the country to enable the use of PetroCard.

4.2.2 E-INITIATIVES (BPCL)

‘**PETROZINE**’, is the ‘e’-initiative of the company for keeping in touch with their valued customers. **BPCL Petrodaily** aims to keep the valued customers updated on the happenings in the Petroleum industry worldwide as well as in India. BPCL also made its presence felt in 2005 by advertising through banners and contests on the website Indiatimes.com and received a huge number of clicks per day which is clearly indicative of the interest they generated amongst the consumer through this platform.

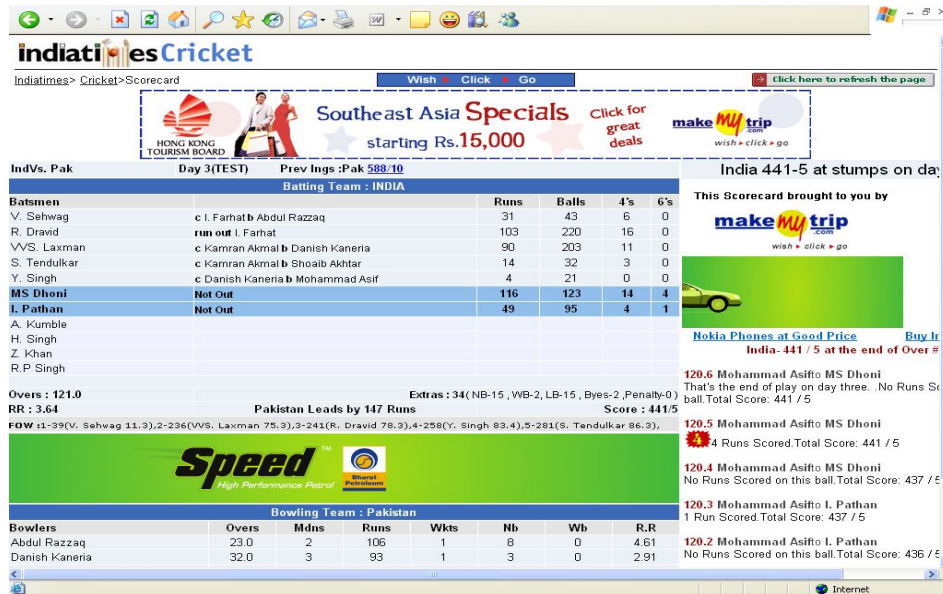


Exhibit 4.6: Bharat Petroleum Speed Banners on Indiatimes cricket.com

Source: Indiatimes.com, 27th January 2005

4.2.3 PROMOTION CAMPAIGNS (BPCL)



Exhibit 4.7: Pure for Sure Campaign of BPCL

In an attempt to provide guarantee of quality and quantity to its customers at the retail outlets of the company BPCL triggered a virtual movement by the name of “Pure for Sure” at select Retail Outlets. This 'Enhanced Fuel Proposition' movement was implemented with full vigour throughout the nation and gave the customers and assurance of quality and quantity of fuel dispensed in the fuel tank of the vehicle. The signage of 'Pure for Sure' was displayed prominently at the retail outlets. Retail Outlets were modernized and

given a facelift and were equipped with state-of-the-art modern infrastructure. Attractive canopies were suitably designed to provide shelter and adequate lighting of the forecourt at most Retail Outlets. In addition to the ambience and modern fuelling facilities, BPCL forayed into non-fuel retailing business by opening convenience stores by the brand name of “In & Out” which endeavoured to cater to the non-fuel needs of the customers. The promotional scheme titled “Bharo Petrol Chalo London” was run from November to December 31st, 2010. The prizes offered were tickets to London and Singapore, free fuel vouchers and free talktime for Petrocard users. This customer activation scheme promised 30 couples a paid trip to London, 45 couples a paid trip to Singapore and there were additional prizes like free talk time which could be won by the users of Petrocard.



Exhibit 4.8: Bharo Petrol Chalo London

Source: wwwwww.bpcl.com

4.2.4 CONVENIENCE STORES (BPCL)

BPCL employed one of the reputed global consultants, McKinsey & Co. to help come out with a retail strategy. Based on its recommendations, BPCL

started opening non-fuelling utilities such as branded “**In & Out**” convenience stores, ATMs, Cyber Cafes, Courier services, Laundry, Photo Studio, Music, Bill Payments, Movies/Entertainment Tickets and Fast Food Outlets at the retail stations. Thus on the Non-Fuel front, Bharat Petroleum introduced the Errand Mall concept successfully at select markets. BPCL in fact, pioneered the concept of convenience stores in India under the name “**Bazaar**” in 1998. These were air-conditioned stores carrying a wide range of convenience items and fast food items. BPCL also added vehicle-related services such as car wash, lubricant fills, top-ups and automatic air gauges.

Another innovative project started by BPCL to win customer loyalty was the concept, “**Ghar**”- literally meaning home in Hindi. Located at major highways across the country, these were multi-facility petrol outlets targeted at both the commercial petrol drivers as well as holiday travelers. The facility at “Ghar” outlets included “Dhaba” services, secure parking spaces, restrooms, an essential items store, emergency assistance and messaging services to assist fleet owners.

4.3 BRAND BUILDING EFFORTS BY HINDUSTAN PETROLEUM CORPORATION LTD. (HPCL)

HPCL is a Government of India Enterprise with a Navratna Status, and a Fortune 500 and Forbes 2000 company, having about 20% market share in India among PSUs and a strong market infrastructure. On the marketing front the company had taken several initiatives. HPCL claims taking care of not only the fuelling needs of the customer but also complete vehicle care. As an answer to BPCL’s “**Pure For Sure**” campaign, HPCL had launched “**Club HP**” initiative and had started adding new retail outlets. Various initiatives of HPCL in the brand building front include issue of loyalty cards, convenience store formats, introduction of branded fuel and various promotional campaigns.

4.3.1 LOYALTY CARDS (HPCL)

HPCL introduced an e-purse cum loyalty card, namely **CLUB HP Smart1** for the benefit of its customers at select Retail Outlets in Metros and Major cities. ICICI Bank HPCL debit card is a companion for many occasions. Its usability is not restricted to petroleum related purchase. It is a widely functional card designed to help customers with great financial support in India and abroad. The ICICI Bank HPCL Debit card is a VISA ELECTRON cum ATM card. The card is valid internationally. No surcharge is levied on Fuel purchases done at HPCL Retail outlets with the debit card. There is a rewards catalogue featuring multiple product categories for redemption, notifying the customers of the benefits from time to time. HPCL also introduced a tailor made product “**DriveTrack**” Fleet Card which offers reward points called “**DriveStars**” for every purchase at any HPCL Petrol Pump. These rewards are offered to the transporter in the form of free fuel.



Exhibit 4.9: Loyalty cards of HPCL

The “**i-mint**” loyalty card is a result of a collaborative effort wherein six leading brands HPCL, ICICI Bank, AirTel, Indian Airlines, Lifestyle and Make my trip.com have joined hands to launch India's first, truly national & a very powerful Coalition Loyalty and Consumer Rewards Program. The i-mint card was launched for the benefit of house hold customers. It has the reward option for the customers upon purchases made not only at select HPCL Retail outlets but also at any one of the partners' establishments irrespective of the mode of payment which can be through credit / debit cards, cheque or even by

cash. The customers were thus able to consolidate reward earnings in a single loyalty account.

4.3.2 RETAIL OUTLET BRANDING (HPCL)

HPCL like the other two public sector oil marketing companies started the strategic retail marketing initiative that aimed at transiting from the old format of fuel retailing to modern practices. Their retail brand "**Club HP**" gave an assurance of high - quality personalized "Vehicle and Consumer Care". The "Club HP" concept aims to provide the assurance of "Quick Fills", "Expert, Personalised Service", "Total Vehicle Management" and "Consumer Conveniences". Various initiatives at the retail outlets of HPCL aim at achieving and strengthening the brand promise of excellent personalised vehicle and customer care. Continuous training programmes of the dealers and their sales personnel aimed at working on the technical expertise and bringing about behavioural changes to address the service element of the business in the changing times. All the efforts were directed towards delivering the "Club HP" promise. Unique training program titled "**Leading with Power**", "**At the Forefront**", "**Positive Value Based Stress Free Supervision**" were conducted for the staff of dealers, forecourt managers and dealers to drive the importance of quality, quantity, quick service, courteous behaviour and stress free management among the dealers and dealer staff who interact with retail customers.

4.3.3 DEALER CONNECT (HPCL)

In order to motivate dealer staff at "Club HP" outlets the scheme of Group Personal Accident Insurance was introduced. The computer education programmes like **HPCL NIIT Jyoti Program** had enrolled several dealers and staff members. The "**Spot & Reward**" scheme provided recognition to a number of staff members. The Scholarship Scheme for "Club HP" dealer staff and dependent children was also extended to motivate them. The "**Club HP**" "**Good Citizen Award**" recognized and rewarded the common man which

included the auto and taxi drivers for their outstanding service and contribution to the society.

4.3.4 PROMOTION CAMPAIGNS (HPCL)

Several campaigns were conducted as a part of customer activation programmes at the retail outlets which provided rewards and recognized to the customer patronizing HPCL outlets. The brand promise campaign of “**Club HP**” “**Achcha Lagta Hai**” was geared towards building an emotional connect with the customers on the service and quality parameters of retailing the fuel. Tie ups with Tata Motors were established to act as vehicle care centres for the customers. Tie up were also established with fast food joints like US Pizza for offering non-fuel benefits to the customers. HPCL’s Branded Fuel “**Power**” and “**Turbojet**” are available along with the normal fuel at the retail outlets. HPCL has also built a profitable non-fuel business with wide range of facilities to the customers. Various non-fuel services like ATM facilities, fast food counters, convenience stores, vehicle accessories stores etc. have given a competitive edge to the company and have also served in widening their revenue.

HPCL’s “**HP-Happy Wheel**” campaign was launched to increase the company’s market share. Running in around 2,000 outlets pan-India, the ‘HP Happy Wheels Offer’ gave HPCL patrons a chance to win fantastic prizes like five Maruti Suzuki A-Star cars, 50 TVS Flame SR 125 bikes, 140 Samsung E250i mobile phones, 20 Samsung Star Touch mobile phones and 7,000 Instafuel cards worth Rs 500 and free fuel vouchers worth Rs 250.”

The entire activity has been conducted in the BTL space at the point of sale, thus strategically engaging the audience and encouraging participation through an SMS to a specific short code. All consumers had to do was to fill fuel worth a specified amount and SMS their bill details to a short code 5676761. In addition to this, they can get more information through a dedicated helpline and website - www.hphappywheels.com. Winners based on a structured

verification process were selected through a randomiser on a weekly basis and notified through SMS, phone call and on the website.

Using an effective BTL advertising through hoardings, standees, banners, leaflets and displays at the HP petrol pumps, the company claimed to have garnered a tremendous response while building brand equity. The first week of the offer reportedly saw over 2 lakh entries. The website reportedly saw over 32,000 visits since the offer began. While the initial offer was slated to run from September 16-October 31, the positive results have led to the offer being extended till November 30, 2009.



Exhibit 4.10: HP Happy Wheels Offer

4.4 SNAPSHOT OF BRAND BUILDING ACTIVITIES BY PUBLIC SECTOR OIL MARKETING COMPANIES

Table 4.1: Loyalty cards of PSU Oil Marketing Companies

S.NO	COMPANY NAME	LOYALTY CARDS (INDIVIDUAL)	LOYALTY CARDS (FLEET OWNERS)
1	HPCL	1) Club HP Smart 1 (ICICI- HPCL co-branded debit and credit card, 2) i-mint loyalty card 3) HPCL-AXIS Bank-STFC Co-Branded Credit Card (HPCL, Axis Bank and Shriram Transport Finance Company (STFC) tripartite co-branded credit card)	Drive Track Plus – prepaid debit card (points earned called Drivestars)
2	BPCL	Petrocard	Smart Fleet cards
3	IOCL	XTRAREWARDS loyalty card	XTRAPOWERT Fleet card (prepaid debit & credit card from Sundaram Finance)

Table 4.2: Brand Building Initiatives of PSU Oil Marketing Companies

S.NO	Company Name	Brand Values	Brand Promise Campaigns	Convenience Store Name
1	HPCL	High quality personalised Vehicle and Customer Care	Club HP	HP Speedmart Stores
2	BPCL	Innovation, Care and Reliability	Pure for Sure	In & Out
3	IOCL	CIPT (Care Innovation Passion Trust)	Ek dum Tez Service Ke Liye Tayaar Hain Hum	Care

Table 4.3: Branded Petrol, Diesel & Lubricants of OMCs

S.No.	Company Name	Branded Petrol	Branded Diesel	Lubricants
1	HPCL	Power	Turbo Jet	Milcy Turbo
2	BPCL	Speed	Hi-Speed Diesel	Mak
3	IOCL	Xtrapremium	Xtremile Diesel	Servo

Table 4.4: Promotional campaigns of Oil Marketing Companies

S.No.	Company Name	Contests/ Promotions	Time Period of Promotion
1	HPCL	1)Bhar Bhar Ke Jeto- Fill To Win 2) HP-Happy Wheel Offer	1) 14 th Jan -31 st March , 2011 2) November 2009
2	BPCL	1)Bharo Petrol Chalo London 2)Mak Scratch Dhamaka	1) Offer closed on 31 st December 2010
3	IOCL	1)Car in a Tank Offer 2) Saal Bhar Free Fuel offer for purchase of branded fuel	1)Offer closed on 30 th April 2009 2) Offer closed on 30 th September 2010

SUMMARY:

This chapter highlighted the brand building activities deployed by the public sector oil marketing companies in India. Details of the branded fuel, loyalty cards, promotional schemes and customer activation programmes of these companies have been presented. Finally a snapshot of the brand building activities has been presented in this chapter. The next chapter is dedicated to the brand building activities of the international oil marketing companies operating outside India.

CHAPTER-5

OVERVIEW OF BRAND BUILDING ACTIVITIES OF INTERNATIONAL OIL MARKETING COMPANIES

Contents	Page No.
5.1 Brand Building activities of Exxon Mobil	101
5.2 Brand Building Activities of Shell	103
5.3 Brand Building Activities of British Petroleum	106
5.4 Brand Building Activities of Chevron	109
5.5 Brand Building Activities of Conoco Phillips	111
5.6 Evolution of International Petroleum Retailing	112

CHAPTER 5

OVERVIEW OF BRAND BUILDING ACTIVITIES OF INTERNATIONAL OMCs

INTRODUCTION

With the ever rising cost of motor fuel in most countries around the world, more and more attention has been focused on the largest oil companies in today's market. The top five international oil marketing companies are:

- Exxon Mobil
- Royal Dutch Shell
- BP
- Chevron and
- ConocoPhillips (Oil Quote, 2010).

In the past many mergers and acquisitions of oil companies have taken place which have changed the leadership positions of many companies. The merger of the Exxon and Mobile corporations resulted into escalation of Exxon Mobile to become the largest corporation in the world. The mergers over the last decade have resulted in formation of Exxon Mobile, Royal Dutch Shell and ConocoPhillips. This chapter is dedicated towards the brand building activities of the top five international oil marketing companies in the world. It would help in comparing the brand building activities of the Indian public sector oil marketing companies with international oil marketing companies.

5.1 BRAND BUILDING ACTIVITIES OF EXXON MOBIL

Exxon Mobil Corporation or ExxonMobil, is an American multinational oil and gas corporation. It is a direct descendant of John D. Rockefeller's Standard Oil company and was formed on November 30, 1999, by the merger of Exxon and Mobil. Its headquarters are in Irving, Texas. It is affiliated with Imperial Oil which operates in Canada. ExxonMobil is one of the largest publicly traded companies by market capitalization in the world, having been ranked either No.1 or No. 2 for the past 5 years. ExxonMobil is the largest of the six oil “supermajors”.

Esso is an international trade name for ExxonMobil and its related companies. In 1972, it was largely replaced in the U.S. by the Exxon brand after it bought Humble Oil, while Esso remained widely used elsewhere. In most of the world, the Esso brand and the Mobil brand are the primary brand names of ExxonMobil, with the Exxon brand name still in use only in the United States alongside Mobil. Texas-based ExxonMobil Corporation has not gone back to emphasizing the quality of its fuel offering in recent advertising campaigns. ExxonMobil believes its consumers already have confidence in the quality of the fuel, so the company is working on other elements of the retail and gasoline offer to keep the customers coming back.

Stew McHie, global branding manager for Exxon Mobil said *"We feel, and our research indicates, that consumers feel that our fuel is of good quality and always has been. We track satisfaction levels, we track customer complaints, and frankly our fuel performs very well in the marketplace, so in terms of*

changing fuel and advertising fuel, that's really not a priority for us right now."

Instead of touting the quality of its fuels offering, Exxon Mobil positioned its brand as enhancing life on the move for its consumers, which the company expressed in advertising with the slogan "We're drivers too." Stew McHie, further said in an interview: *"We understand what life is like out there; we know the joys and frustrations of life on the road. That's why we're uniquely positioned to provide you with a better experience, because it's the same experience we would want as consumers."*

The company strived to differentiate its brand through its extended offer of the convenience experience to make the consumer's life somehow better. Priorities have been centered around promoting and growing the **On the Run** c-store format, "**SpeedPass**" payment systems and enhanced car-wash offerings.

The use of the Esso tiger in its advertising over a number of years has made Esso one of the higher-profile brands in petrol retailing, while its recent concentration on low pricing with its Price Watch campaigns has established it as one the more competitive major oil companies in terms of price.

Esso also entered into a joint venture with Tesco in August 1998 to introduce **Tesco Express** convenience stores onto a number of Esso forecourts. On company-owned forecourts, the c-store format is branded as **Snack and Shop**, with this fascia being extended to many of its other sites. The Snack and Shop outlets generally offer around 1,500 product lines and have a shop-floor area of around 100 square metres. Esso also piloted a '**Fresh Ideas**' supermarket-style format for a limited number of forecourts in 1999 and 2000, offering a higher proportion of fresh produce than a typical c-store. In line with the trend towards provision of ATMs on garage forecourts, Esso has entered an agreement with the Halifax to provide cash machines on 250 forecourts. To garner consumer loyalty and preference ExxonMobil introduced personal as

well as commercial credit cards which could be used to pay for everything from gas at the pump to food and supplies at over 10,000 Exxon and Mobil stations.

5.2 BRAND BUILDING ACTIVITIES OF ROYAL DUTCH SHELL



Royal Dutch Shell, commonly known as Shell, is a global oil and gas company headquartered in The Hague, Netherlands and with its registered office in London, United Kingdom. It is the fifth-largest company in the world (and the second-largest energy company) according to a composite measure by Forbes magazine and one of the six oil and gas "supermajors". It is vertically integrated and is active in every area of the oil and gas industry, including exploration and production, refining, distribution and marketing, petrochemicals, power generation and trading. It also has major renewable energy activities, including in biofuels, hydrogen, solar and wind power.

Greenberg Karl (2002) in his paper titled “**Shell’s New Game**”, published in Brandweek, described the brand building efforts by Shell. In 1999 and early 2000, Shell spent £350m on modernizing and redesigning its 1,700 Shell-branded service stations, with the stated aim of providing new or improved services in a cleaner, brighter and more welcoming atmosphere. Shell created 900 **Shell Select** stores and developed the market's largest petrol-based convenience store chain. The company's commitment to c-store retailing was shown by the opening of a non-fuel-based outlet on The Strand in London, close to the traditional UK headquarters of the company. The store is the

largest convenience outlet on The Strand, with a shop-floor area of 160 square meters, and is open 24 hours a day, 365 days a year. It is the first such store in the UK, although there are around 30 other stand-alone Select stores worldwide.

Shell launched the **SMART** customer reward programme in October 1994, with 5 million members of this scheme by 2000. The scheme worked by the use of points, with three points awarded for every 5 litres of fuel and points also given for shop purchases. These points could be exchanged for various gifts, services or Air Miles. SMART was also developed as a multicompany loyalty programme, in which several other major UK companies joined Shell in issuing and redeeming SMART Points, including Avis Rent-A-Car, British Gas, British Midland, Commercial Union, First Choice, Hilton Hotels, John Menzies, KLM UK, Le Shuttle, RAC, UCI Cinemas, Unijet, Vauxhall, Virgin Net and Vision Express.

There are more than 850 **Shell Select Shops** across the UK, with most (80%) being open 24 hours a day and the remainder opening from 6am to 11pm. Most stores carry around 2,500 to 3,000 different product lines, including many well-known brands and an increasingly wide selection of its own-label Select-branded products. It is estimated that non-fuel items account for 60% of sales at Shell service stations, with products divided into four main sectors: treats and gifts, top-up shopping items, food services and news agency. All Shell Select stores sell hot drinks and 98% also sell hot food, with 50 stores having their own bakeries and 44 having off-licences. In total, there were around 3,000 Shell Select stores worldwide in 2000, spanning 40 countries.

Prior to 2002, Houston-based Shell Oil Products US had shied away from advertising its fuel characteristics for about 10 years. But, with a multimillion-dollar advertising initiative, the company not only started promoting a "quality fuels" campaign but also launched a new premium-grade gasoline. The **"quality fuels" campaign** was launched in the United States in 2002 to try

and restore a dialogue with Shell customers. The company recognized that Shell's reputation as a provider of quality fuels, which had been hard-won over many decades, was losing its foothold with the customer.

Based on the foundation of the "quality fuels" campaign, Shell then moved in 2003 to the **"Get Better Mileage" campaign**, which emphasized the value-for-money proposition of Shell's base fuel offering. The combination of those two campaigns was intended to build a solid foundation for the company's third initiative — **the nationwide launch of V-Power**, a new premium-grade gasoline was made available at all 13,000 Shell stations in the United States, accompanied by a national advertising and marketing campaign including television, radio, Internet, print, point-of-purchase and technical magazines.

Shell's extensive research pointed out that customers are increasingly more knowledgeable about fuel and are interested in attributes that they find important, from responsiveness and value for money to power and engine cleanliness.

Hamdi Raini, 2003 in the article titled **"JWT picks frigate bird to sharpen Shell branding"**, published in Media: Asia's Media & Marketing Newspaper, on 28th November described Shell's brand building strategy to sharpen its brand image with a campaign centred on a frigate bird, to underline the message that its products provide better mileage without additional cost. The campaign was launched in conjunction with Shell's introduction of a fuel economy formula for all its petrol brands in Singapore. The campaign's creators chose a frigate bird — the most aerial of sea birds, with the capacity to fly long distances at a time — as it best conveyed the key message of Shell's new fuel economy formulation. 'The new formulation reduced friction in the engine, enabled the car to run more efficiently, and hence allured the consumers further. The choice of a frigate bird also tied in with Shell's 'seashell' image, which was first seen in the **Shell V-Power campaign** and again in the **'Better mileage' campaign**.

5.3 BRAND BUILDING ACTIVITIES OF BRITISH PETROLEUM (BP)



British Petroleum (BP) is a global oil and gas company headquartered in London, United Kingdom. It is the third-largest energy company and fourth-largest company in the world measured by revenues and one of the six oil and gas "supermajors". It is vertically-integrated and is active in every area of the oil and gas industry, including exploration and production, refining, distribution and marketing, petrochemicals, power generation and trading. It also has major renewable energy activities, including in biofuels, hydrogen, solar and wind power.

Bogoslow David, (2002) in his research paper titled “**BP's New Gas Stations to Drive Effort to Go Beyond Petroleum**”, published in the Wall Street Journal discussed the plethora of marketing challenges that the company had in terms of re-educating consumers. First was the challenge of combining the BP and Amoco brands into one unified entity and being able to transition customers to BP with Amoco fuels. Next came the full-throttle introduction of a differentiated convenience offer, which came in the form of **BP Connect** with the Wild Bean Café east of the Rockies, and ARCO am/pm west of the Rockies. It seemed at that time that all marketing efforts were going toward promoting the new enhanced retail offer to customers.

Embrey Alison (2004) in the research paper titled “**Battle of Brands**” has discussed how international oil marketing companies are continuously strategizing to have higher market share and create Top of Mind Awareness in the minds of the consumer. The paper discusses how BP has been beefing up its marketing push for the premium ultimate brand, as there is a certain

segment of customers that continues to buy premium fuels because they want to enhance their car's performance, or because environmentally friendly fuels are important to what they're doing and how they contribute to their community. Working hand-in-hand with the **BP Ultimate** campaign is the **BP "on the street"** campaign. The current premise of the advertising campaign joins together both performance and clean fuels, and the fact that cleaner, better performance is the cornerstone of a distinctive fuel strategy. Another aspect of BP's brand-differentiation strategy has been its promotion of alternative energy sources through the **"It's a start" campaign**.

Boylan Brian in his article titled **"Brand new direction: BP's logo change acknowledges the critical role branding plays in corporate progress"** published in Financial Times in 2000, states that BP's change of logo was driven by business needs rather than the desire for change for change's sake. Brands therefore are driving the economic performance of companies in present times. Most powerful brands of the world symbolise much more than the product or service offered by them. In the present times where there is very little point of differentiation among the products and services brands enable the companies to stand out of the clutter and create a point of differentiation. The higher brand position of the company acts as a motivation for the internal staff and gives the company the means by which to build relationships with customers and partners.

"Beyond Petroleum", the new idea behind the brand, was ambiguously clever. It shed the old image of British Petroleum just being associated with petrol and embraced a new open ended image of vibrancy. On the one hand, it embraced the large-scale energy activities of BP and on the other, the clean and easy forecourt retailing and managing operations.

By ditching the shield logo, BP closed the chapter on 70 years of history. Some analysts thought of it a foolhardy move. Instead the old logo symbolised old BP, the petroleum company. Over a period of time the group had changed

and there was a promise of continual change which the new look has to signal. The change had to be real - and be seen to be real. Dropping the shield emphasises that change: the sunburst logo promises - and perhaps over-promises - the new era

Arnott Sarah, in the article titled “**BP aims to win more than plaudits from Pounds 50 m Olympic**”, published in The Independent, on 4th July, 2008, (London Edition) stated that BP had become the latest British corporation to be a headline sponsor of the London 2012 Olympics, in a multi-year deal estimated to be worth in excess of \$50 million. The oil major joined an illustrious list: Lloyds TSB, EDF Energy, Adidas, British Airways and BT are already signed up to contribute both money and services to put together and run the event.

BP's contribution will include fuel for all 4,700 official vehicles, as well as Liquefied Petroleum Gas for catering and technical support. It will also be supporting the four-year "Cultural Olympiad" designed to ensure that the impact of the games reaches across the whole country.

The “Beyond Petroleum” campaign of British Petroleum commenced in July of 2000 which aimed at positioning the company as a leader in providing cleaner petroleum and renewable energy. British Petroleum acquired Solarex in 1999 which gave BP Solar the distinguished honour of being the largest producer of solar panels. Kotler (2009) reported that after British Petroleum undertook a major rebranding initiative and gave a fresh environmentally conscious new look to the company, its ranking among other global “Superbrands” was number nine in 2009. Exhibit 5.1 also shows how British Petroleum gained brand power after it adopted the tagline of Beyond Petroleum. The graph peaked in 2008 and then dropped slightly in 2009 owing to the decreased advertising expenditures (from \$75 million in 2007, \$53.5 million in 2008, to \$32.8 million in 2009), as well as declining industry average brand equity trends (\$13 billion in 2008 to \$7.4 billion in 2009, or a

43% drop). However, according to the same research, BP's brand equity decreased less dramatically (from \$19.9 billion in 2008 to \$14.3 billion in 2009, or a 28% drop), suggesting that its brand value may have acted as a buffer during this period.

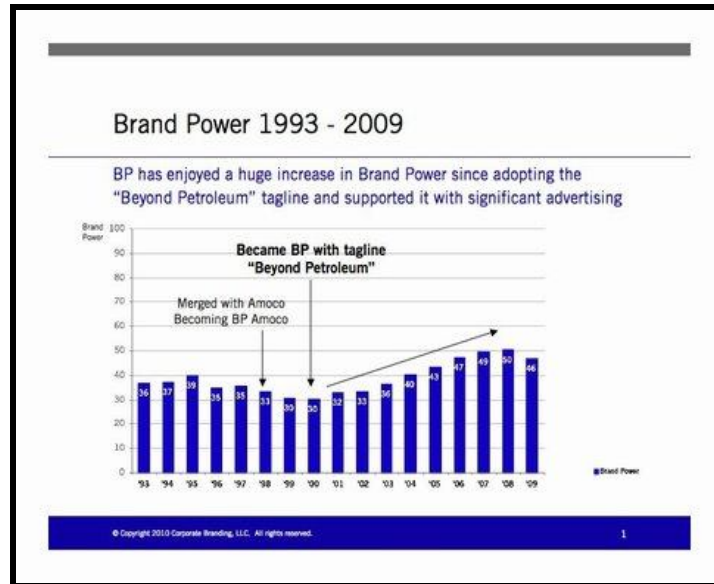


Exhibit 5.1: Increase in Brand Equity of BP

Source: Branding Strategy Insider (2010)

5.4 BRANDING BUILDING ACTIVITIES OF CHEVRON



Chevron Corporation is an American multinational energy corporation headquartered in San Ramon, California, United States and active in more than 180 countries. It is engaged in every aspect of the oil, gas, and geothermal energy industries, including exploration and production; refining, marketing

and transport; chemicals manufacturing and sales; and power generation. Chevron is one of the world's six "supermajor" oil companies. For the past five years, Chevron has been continuously ranked as one of America's 5 largest corporations by Fortune 500. In 2011 it was named the 16th largest public company in the world by Forbes Global 2000.

Chevron launched the **Chevron Image Refresh** program geared at giving a facelift to the fueling areas to incorporate modern and friendly brand image of Chevron retail locations. The first phase of this brand building initiative covered the retail locations in Arizona, California, Hawaii, Texas, Florida and Alabama. It took Chevron approximately five years to give a renewed and refreshed image to approximately 7,500 Chevron retail locations in North America. Shariq Yosufzai, president of Chevron Global Marketing said *“Customers have come to expect high-quality products and services from the Chevron brand. The Chevron Image Refresh program further highlights our ongoing legacy of providing an unsurpassed customer experience that keeps us at the forefront of our industry.”* Chevron had piloted the program throughout 2006 in northern California and Seattle. The program was designed for the customers who could be categorized as "early adopters," of the new rebranded and rebuilt sites. The program introduced new technologies which enhanced the customer experience.

Chevron and Texaco credit cards enable the individual customers to purchase fuel and other retail items from the company. Chevron, Texaco and Caltex business credit cards serve to fulfill the fuel, snacks and fleet vehicle needs of the customers. The gift cards are availed and utilized by millions of customers to pay for the fuel and non-fuel services at Chevron and Texaco stations in the United States and Caltex stations in the Asia-Pacific region. People can utilize these prepaid cards as gifts. The company utilizes them for running various incentives and promotional prizes.

5.5 BRANDING BUILDING ACTIVITIES OF CONOCOPHILLIPS



ConocoPhillips Company is an American multinational energy corporation with its headquarters located in the Energy Corridor district of Houston, Texas in the United States. It is also one of the Fortune 500 companies and 22nd on Forbes Global 2000. ConocoPhillips is the fifth largest private sector energy corporation in the world and is one of the six "supermajor" vertically integrated oil companies. It sells fuel under the Conoco, Phillips 66 and Union 76 brands in North America, and Jet in Europe. ConocoPhillips was created through the merger of Conoco Inc. and the Phillips Petroleum Company on August 30, 2002. ConocoPhillips is no stranger to fuel differentiation. As part of its new direction for the future, the company recently announced a new gasoline brand advertising campaign, "**Life Happens Between Empty and Full**," which puts a new spin on the brand and its quality fuels.

The "Life Happens Between Empty and Full" campaign unites the company's three major U.S. gasoline brands — Conoco, Phillips 66 and 76 — and coincides with the recent launch of Quality **PROclean** gasolines to every station in the country. At the beginning of the year, the company made a significant corporate decision for all three brands to up their additive to the top treat rate in all three gasoline grades, from regular unleaded to premium.

"We raised the quality of our gasoline by increasing our detergent additive program to levels that go far beyond the national standard, and exceed levels of many competitors," said Mark Harper, president, U.S. marketing for ConocoPhillips. The new fuel offer markets to the consumer looking for a cleaner fuel alternative that will maximize a car's performance. Some of the

touted results include giving drivers smoother acceleration, helping to restore engine performance, reducing hesitation and making a driver's car more responsive — all through fuel quality. *"From our consumer research we know the best way to become the brand you trust is to offer one of the highest-quality products on the market,"* Harper said.

The "Life Happens Between Empty and Full" campaign launched in major markets on April 1, 2010 included a full spectrum of television, radio and print ads to pass the message. Images detailed how gasoline products fit in with day-to-day life, and how you rely on your car to live and move about with your daily activities.

The company is really pushing the "clean" factor of the new fuel, even down to renaming the offering Quality PROclean. Some of the fun and witty slogans used in outdoor advertising include: "It's like flossing for your engine," "Because the squeegee can't reach the tank," and "Wash behind your fuel injectors."

As the advertising campaign swung into full force, the company also did its best to promote the effort directly to its loyal customers as well. A brochure highlighting at a cursory level the technical information on the new gasoline was produced and was made available at ConocoPhillips sites for consumers. Point-of purchase materials for the campaign were also delivered to the sites in the third quarter.

5.6 EVOLUTION OF INTERNATIONAL PETROLEUM RETAILING

5.6.1 The Industry: 1960-1969

"The Sixties" are historically known as an uproarious time for the U.S., with the Vietnam War, the anti-war movement, the Civil Rights Act and struggle, the rise of feminism and numerous riots around the country. In stark contrast, however, the period for the petroleum industry was relatively calm, with the

major oil companies experiencing a kind of a golden era. In hindsight, the decade set the stage for some of what would prove to be important trends in petroleum retailing and marketing for years to come.

5.6.2 Tie-Ins

By the 1960s, most of the groundbreaking ideas in selling petroleum had already been introduced. However, more and more of the oil marketers began trying out these novel ideas throughout the decade, the most popular of them—diversification. Several new areas of petroleum retailing were more frequently reported throughout the period, and many of the reports discussed how these segments could offer new revenue streams.

Some petroleum marketers had been in the automotive service and sales market since the '30s. However, articles, such as "**TUNEUP: The \$1,236,000,000 Market**" in the August 1961 issue of National Petroleum News (NPN), started making more of a case for this business segment. The majors also started to turn in favor of it and there was a marked shift by oil companies in favour of tuneup for their dealers. More cars on the road caused a demand for more light repair car work—a demand some marketers jumped at filling, especially when the pressure on the gasoline margin began forcing dealers to look for other sources of income. As illustrated in the NPN, August 1962 article "**How You Can Fight Back at the Discounters**" and in June 1964 article "**Finding New Directions for Extra-Payoff Sidelines**", the other areas where marketers tried entering were documented. Some segments, like auto rentals, did not have much staying power, but others, like the car wash became a major profit center. In the article titled "**Car Washing: An old tie-in takes new shape,**" NPN reported that new technological advances and an equipment boom began spurring an interest in this area. Coin-operated, self-service car washes also started garnering a lot of attention, but in 1964, some of that equipment had only been out, less than a year and no one was certain of its future. Pairing food service and convenience stores with selling gas only

grew stronger during this decade. On the flipside, some convenience store chains started to enter the retail gasoline market, as noted in the NPN, August 1964 article "**Grocery Chains Eye Gasoline Sales**". The piece reported plans of a network of "**Supertron**" stations to enter the market using self-service pumps, which also marked the first substantial entrance of self-service in the U.S. market. In a January 1967 article entitled "**Three-Way Money- Maker Station**", illustrated how a private brand in Los Angeles combined three businesses at one location: gasoline, convenience store, and coin-op car wash.

5.6.3 Credit Expansion

Credit at retail sites wasn't exactly a new venture in the '60s, as it was introduced in the decade before, but its presence did become more prevalent in '60s. As the new highway culture was taking hold and America increasingly became an on-the-go nation, the consumer demand for a fast payment method, like credit, grew. The evolution of credit spurred a number of other needs, leading to advances and trends in the oil marketing industry. With credit cards, self-service pumps began to have the capability of taking money without the need of an attendant. The May 1963 article, "**New Self-Serve Pump Device**", documented the equipment's entry into the market. A June 1967 article, "**Gasoline Pump Takes on Printing Job**" reported on Wayne Pump Co.'s development of a pump-actuated imprinter. With the focus on the pumps, merchandising at the island became a hot idea. In the July 1964 issue, NPN took a look at this reborn concept in the article titled "**The Service - Station Island: What Selling Role Should It Play?**" The piece included tips, like placing "**merchandise ahead of the island, where the motorist will see it,**" and suggestions that the station of the future would be the island. One of the side effects of the credit card boom was the high piles of paperwork. Oil companies, like Marathon, found themselves having to revamp their accounting and data processing departments, as noted in the NPN Sept. 1966 article "**Machines Move Mountains For Paper-Ridden Marathon**". The company began to heavily invest in new and faster computers from IBM as

well as "sorters, collators, microfilming recorders, accounting and proving machines." The growth of credit cards also caused the proliferation of fraud, which NPN focused on in its March 1967 article "**Credit-Card Frauds: What You Need to Know About this Growing Danger**". The piece documented the petroleum marketers' urge for better prosecution, security and control.

5.6.4 Promoting and Marketing

Throughout the decade, major oil companies strengthened their brands and took their previously regional stations nationwide. With more petroleum players entering the market, many existing companies started to merge, including Pure Oil and Union Oil in July 1965, which helped to spread the Union 76 corporate trademark, as noted in the June 1967 NPN article "**Union 76' Goes Nationwide**". Additionally, an oil company from overseas, British Petroleum or BP, entered the U.S. market as a result of oil companies Atlantic and Sinclair merging as reported in NPN April 1969 issue. Part of what made this coast-to coast movement possible was the country's brand new highway system, some of it still being built in the '60s. The Highway Beautification Act of 1965 set up the gas-food lodging signs that are characteristic of all interstates today. The development was a big conquest for marketers with stations near highways, as reported in the NPN August 1966 article "**Marketers Win Right to Interstate Signs**". It meant that they would be able to advertise their brands right on the roads. In the May 1967 issue, NPN published a report on how the stations on the highway were faring in the article "**Interstate Market: New, Big, Rich**". The article stated the interstate results surpassed even optimistic forecasts, "*Traffic is heavier than expected. I station volume is higher than expected. Targets are being met earlier than forecast.*" At the time, more than 5,000 stations on the highway system existed, making up an estimated four-billion-gallon gasoline market. Advances in pricing strategies and new marketing methods proliferated throughout the decade. Zone pricing was introduced by some of the majors, which priced by

wide areas rather than station by station. The method became more common throughout the decade and resulted in some price stabilization. Oil companies in the '60s became acutely aware of the effects of advertising, as reported in NPN's August 1961 article "**Behind Those Oil Ad Changes**". As a result of the mergers and expansion of brands in new territories, the majors needed to communicate to the customers and began spending more than ever to reach their audience. Some marketers took a more basic approach, as the NPN August 1963 article "**Florida Station**" illustrated. The piece reported on a station "**staffed 100 percent by girls**", with the intention to attract male motorists; evidence that the rise of feminism in the decade hadn't quite permeated the culture yet.

5.6.5 Investigations And Hearings

The Federal Trade Commission had finally been letting up on its oil pricing cases by the middle of the decade, but the petroleum industry started to face opposition stemming from a new concern - pollution. Although environmentalism was in its very early stages, the charges made against oil marketers were already significant enough that NPN devoted a special report to it in the August 1966 issue, entitled "**What You Need to Know and do About Air Pollution**". The article mentioned congressional hearings on air pollution had "**brought forth a flood of testimony from witnesses who thought that leaded gasoline creates a health hazard,**" which would become a major issue in the years to come. Another series of congressional hearings looked at promotional games used by some major oil companies, reported on in July 1968's article "**Games Become a National Issue**". Rep. John Dingell (D-Mich.) lead the investigation into the practice of the lottery-like contests, which were designed to promote products through sweepstakes. The 1969 investigation charged that small businesses were unfairly having to bear the financial brunt of the majors run games and that some of the contests were deceptive and had been manipulated. However, Congress did not pass a regulatory bill; thus, sweepstakes continue to be a heavily used form of

marketing in many industries to this day. The petroleum industry escaped most of the '60s unscathed, with mostly expansive endeavors to show for it.

In the past several years, the petroleum and c-store retailing industries have undergone a period of reinvention and have encountered issues that have changed the face and sometimes the nature of the business. Because of the recent volatility of oil prices, petroleum marketers have included different profit centers, such as c-store retailing, to survive and flourish. Findings of the research conducted by AC Nielsen MMS on International Oil companies and Forecourt retailers in the year 1999 established that at garage forecourts, the bulk of sales came from the retailing of fuel, accounting for over 88% of the total in 1999 and was estimated to rise to almost 91% in 2000, mainly due to the escalation in retail fuel prices as world oil prices increased. The high price of petrol meant that many consumers tended to favour the supermarkets when filling up their cars after doing regular food shopping and were less inclined to use the forecourt shop for anything other than paying for their fuel.

Research pointed out that the steadily ageing nature of the population in the UK should help to continue to boost the popularity of c-stores in the period to 2004. While the total population is expected to grow only slowly, there will be an increasing proportion of adults in the older 55+ age groups. This trend should impact positively on the c-store sector, and if the forecourt retailers can establish themselves as a stronger force in this sector, the profits from non-fuel retailing should continue to rise. While older people are traditionally more price conscious when shopping, they are becoming more affluent, while at the same time preferring smaller, less intimidating shops in terms of size and the range of products available. Some older people may find the size of larger superstores daunting, and they are prepared to pay more for the convenience of using a local store — especially if they do not have their own means of transport. Older shoppers also tend to shop for a small number of items with greater frequency, having more time to go to the shops, and c-stores constitute an easier and more convenient alternative to the superstores.

The only problem for forecourt convenience retailers is that older people are less likely to drive, and, if they do drive, tend to cover much shorter distances than younger drivers and will not visit a forecourt for fuel as often. As such, the petrol retailers need to work harder to present themselves as general c-stores for local people. Many are already doing this by offering other services, such as ATMs, and it is likely that increasing numbers of people will use forecourts for shopping in the future. This is especially the case if they are able to improve other facilities, such as parking for those not purchasing fuel, for example.

According to ACNielsen MMS, BP was the only company to have spent significantly on main media advertising in the 6 months to June 2000, with a budget of £493,000. In 1999, Sainsbury's was the leading spender on advertising for its petrol, with a budget of £0.8m, representing just over 21% of total advertising expenditure in the sector. The next biggest spender was BP, with campaigns for its garages and for the Premier Points scheme. The bulk of this advertising activity was via radio.

Jet and Tesco were the next largest spenders, with budgets of £0.7m and £0.5m respectively. Granada service stations were advertised via press only. Most of Esso's budget also went on press advertising, whereas Jet spent mainly on television advertising. Radio and press were, in general, the most popular types of media for above-the-line advertising, while the loyalty schemes that have traditionally been popular became less important as price competition had become the main form of promotion.

Esso, for example, dropped its Tiger Tokens loyalty scheme in 1997 and concentrated instead on its Price Watch scheme, designed to reposition Esso as the cheapest oil company brand, in direct competition with the supermarkets. At various times the Price Watch scheme had involved money-off vouchers with every purchase of fuel. Although this particular scheme was abandoned early in 1999 because of the fierce price competition from the supermarkets,

Esso still claimed to offer competitive fuel prices within the local area. In 2000, other discount schemes were introduced, with a 2 pence per litre (ppl) discount voucher given with every £15 worth of fuel and a free glasses promotion also run in the first half of the year.

Most of BP's promotional activity in 1999 and 2000 was focused around the BP/Mobil Premier Points loyalty scheme, which was run in conjunction with the High Street catalogue retailer Argos. Shell offered a similar product with its SMART loyalty scheme.

As an important feature of this report, Market Assessment has commissioned an exclusive and independent survey from National Opinion Poll (NOP) Solutions into consumer purchasing behaviour in the forecourt retailing sector. The research focused on the key product categories stocked by forecourt retailers and the profile of consumers who regularly purchased these products.

The fieldwork took place in August 2000, in Great Britain, among a sample of 1,041 adults aged 15 years and older, using face-to-face interviewing techniques. Consumers were presented with a list of product categories, from which they could choose as many as were relevant to them. Comparative responses taken from similar surveys in 1994 and 1999 are also provided, in order to identify trends in consumer behaviour.

There had been a dramatic slump in purchasing of all products from forecourt retailers between 1998 and 2000, and even over a longer timescale purchasing had fallen for most products since 1994. Between 1994 and 2000, the only products which saw an increase in regular purchasing were newspapers/magazines/books, confectionery and soft drinks. As these were traditional staples of the forecourt retailer, this was perhaps not surprising, but even here there had been a steep decline in regular purchasing between 1999 and 2000.

SUMMARY

The marketing and retailing of petroleum has evolved over the years and this evolution has been guided primarily due to free and competitive market conditions in the west. Forecourt retailing of non-fuel product lines grew during the late 1990s as the oil companies sought to diversify in order to boost profit margins at a time when profits from fuel sales alone were down due to lower crude oil prices. In terms of demand-side factors, the development of garage forecourt retailers into c-store formats has been in recognition of changes in consumer needs and demands. The convenience market in general terms grew in response to changing demographics, with more single households, more working women and increasingly time-pressured lifestyles. The petrol retailers developed forecourt sites in order to capitalize on these changes and to take a larger share of the c-store market.

According to industry analysts sales of fuel contribute around 85% to 90% of forecourt retailing turnover, but non-fuel sales nevertheless remain important, particularly in view of the fact that margins on fuel can be as low as 5%, depending on world oil prices, whereas convenience store goods can earn margins of between 20% and 30%.

The next chapter is a comparative study of the brand building activities of public sector oil marketing companies in India with the international oil marketing companies. The rationale behind doing such a comparison is to understand the level of advancement achieved by the Public Sector Oil Marketing companies in India as compared to their western counterparts. It would help in analyzing the areas where there lies a scope to better the brand building efforts.

CHAPTER 6

COMPARISON OF BRAND BUILDING ACTIVITIES OF PSU OMCs IN INDIA WITH INTERNATIONAL OMCs




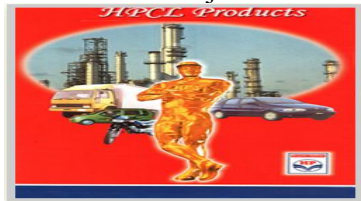


INTRODUCTION

A comparative analysis of the brand building activities of the public sector oil marketing companies in India and the international oil marketing companies operating outside India would help in understanding the broad differences that exist in their brand building activities. From the available literature on the brand building activities of the international oil marketing majors a comparative analysis was done for branded auto fuels, types of loyalty cards issued, convenience stores operated and the promotional campaigns run. Shell, British Petroleum and Esso operating in the UK market were compared with the Indian public sector oil marketing companies. Such a comparative analysis from the published literature of the company and secondary resources assisted the researcher in understanding the evolution of the Indian petroleum marketing vis a vis the global scenario.

6.1 BRANDED PETROL AND DIESEL

The Public Sector Oil Marketing companies in India have so far introduced only one brand each for petrol and diesel products which have higher octane levels and additives which claim to increase the fuel efficiency of the vehicle (refer to table 6.1).









Table 6.1: Petrol and Diesel brands of Public Sector Oil Marketing Companies in India

Company	Image	Branded Diesel
BPCL	Speed 	Hi-Speed 
HPCL	Power 	Turbojet 
IOCL	Xtrapremium 	Xtramile 

The responses from the customers during personal interview sessions further indicated that due to the ever increasing fuel prices and the lack of benefits perceived by them to start using higher octane fuels, they preferred using unleaded fuel and avoided premium fuel with additives. Though normal unleaded fuel is also marketed by the international oil marketing companies operating outside India but there are more than one brands of premium fuel (both petrol and diesel) on the offer at different price ranges and having different grades of additives by each oil marketing company as can be seen from table 6.2 for branded petrol and table 6.3 for branded diesel of the three international oil marketing companies operating outside India. The research by AC Nielsen done on international petroleum retailers pointed that when a customer is exposed to more than one brand of petrol or diesel and there is an established differentiation for each brand by the company, there are higher chances for him to do a comparative analysis of different brands and make a purchase decision.


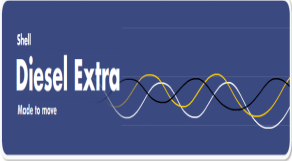




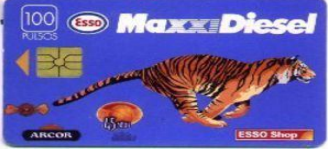
Shell markets four variants of petrol namely Shell Nitrogen enriched Gasoline, Shell V-Power, Shell unleaded E-10 and Shell Premium. British Petroleum has two variants of petrol on offer namely Amoco Ultimate with invigorate and BP gasoline with invigorate. Esso markets three variants of petrol namely Esso Ordinaire, Esso Extra and Esso Supreme.

Table 6.2: Petrol Brands of International Oil Marketing Companies

Company	Branded Petrol
Shell	<p>1) Shell Nitrogen Enriched Gasoline </p> <p>2) Shell V-Power </p> <p>3) Shell Unleaded E-10 </p> <p>4) Shell Premium </p>
British Petroleum	<p>1) Amoco Ultimate with invigorate </p> <p>2) BP Gasoline with invigorate </p>
Esso	<p>1) Esso Ordinaire </p> <p>2) Esso Extra </p> <p>3) Esso Supreme</p>

Shell markets three brands of Diesel namely Shell Diesel, Shell V-Power Diesel and Shell Diesel Extra. British petroleum also markets three variants of diesel i.e. BP Diesel, BP Diesel Supreme and Amoco Premier Diesel. Esso markets the Maxi diesel brand (refer to table 6.3)

Table 6.3: Diesel Brands of International Oil Marketing Companies

Company	Branded Diesel
Shell	<p>1) Shell Diesel </p> <p>2) Shell Diesel Extra </p> <p>3) Shell V-Power Diesel </p>
British Petroleum	<p>1) BP Diesel </p> <p>2) BP Diesel Supreme </p> <p>3) Amoco Premier Diesel </p>
Esso	<p>1) Maxi Diesel </p>

6.2 LOYALTY CARDS

Amongst the Public sector Oil marketing companies in India, Hindustan Petroleum Corporation Ltd. (HPCL) has the highest number of loyalty cards on the offer. Each of the public sector oil marketing company in India has introduced separate loyalty cards for the individual consumers and for the truck owners or fleet owners as can be seen from table 6.4.

Table 6.4: Loyalty Cards Issued by Public Sector Oil Marketing Companies in India

Company	Loyalty Cards for Individuals	Loyalty Cards for Fleet Owners
BPCL	1) Petrocards 	Smart Fleet Cards 
HPCL	1) i-mint cards  2) HPSpeedmart  3) Club HP Smart1  4) ICICI HP card 	Drive Track Plus cards 
IOCL	1) Xtrarewards card 	Xtrapower Fleet cards 

The international oil marketing companies however are way ahead of their Indian counterparts in the area of issuing loyalty cards. As can be seen from tables 6.5, 6.6 and 6.7, each of the international oil marketing company has a good range of loyalty cards to benefit the customer in a variety of ways like cash discounts, gift cards, business solution cards, commercial vehicle cards, fleet cards, cards for truck owners etc. Such loyalty schemes have proved to be quite successful in attracting the customers and also eliciting loyalty from them.


Table 6.5: Loyalty Cards Issued by Shell

Loyalty Cards of Shell		
1) Shell Smart Card 2) Shell Saver Card		
1) Shell Card 2) Euro Shell Card 3) Shell Fleet Mail Card		
1) Shell Gift Card		

Table 6.6: Loyalty Cards Issued by British Petroleum

Loyalty Cards of British Petroleum	
<p>1) Business Solution Cards</p> <p>2) BP Plus Fuel Card</p>	 <p>The image shows three Business Solutions Fuel Management cards (one green, one yellow, one blue) and a BP Plus Fuel Card. The BP Plus card is yellow and green, featuring the bp logo, 'BP PLUS', a ROUTEX logo, and the card number 0011 0011 0010 1101. It also lists 'TRANSPORT COMPANY LTD' and 'HEMEL HEMPSTEAD HERTS'.</p>
<p>1) BP Loyalty Card</p> <p>2) BP Partner Club Card</p>	 <p>The image shows a BP Loyalty Card (yellow and green) and a BP Partner Club Card (yellow and green). The Partner Club card features the bp logo and the text 'partner club'.</p>
<p>1) BP Reward Card</p> <p>2) BP Cash Card</p> <p>3) BP Gift Card</p>	 <p>The image shows three cards: a BP Reward Card (yellow and green) with '\$10 Thank You', a BP Cash Card (white and green) with 'bp cash! for food, fuel & fun', and a BP Gift Card (white and green) with 'giftcard \$\$\$\$'.</p>

Table 6.7: Loyalty Cards Issued by Esso

Loyalty Cards of Esso	
1) Esso Extra Card 2) Esso Gift Card	 
1) Esso Diesel Card 2) Royal Bank Esso Card	 
1) Esso Truck Card 2) Esso Commercial Vehicle Card	 

6.3 PROMOTION CAMPAIGNS

Post 2002, after the dismantling of the administered price mechanism and in anticipation of increase in competition from the private players, there was an increased thrust by the Indian public sector oil marketing companies towards communicating their brand promise to the customers (see table 6.8 and table 6.9). The international oil marketing companies however are far ahead of their Indian counterparts in terms of marketing communication activities. Where on one hand the public sector oil marketing companies in India rely mostly on the hoardings at the retail outlets of the company and very sparingly use the

television, radio and internet as a medium of communication, the international oil marketing companies make extensive use of above the line marketing communication vehicles.

Table 6.8: Brand Promise Campaigns by Public Sector Oil Marketing Companies

Company	Brand Promise Campaigns	Image
BPCL	Pure For Sure	
HPCL	Club HP- Achcha Lagta Hai	
IOCL	Ekdum Tez Service Ke Liye Hum Tayaar Hain	

Table 6.9: Promotion Campaigns by Public Sector Oil Marketing Companies

Company	Promotional Campaigns	Image
BPCL	1) Bharo Petrol Chalor London	 Click here for Winners list
HPCL	1) Bhar Bhar Ke Jeeto-Fill to Win (HP Happy Wheels Offer)	 Click on the images to enlarge
IOCL	1) Car in a Tank 2) Saal Bhar Free Fuel	

As seen in Exhibit 6.10 the international oil marketing companies have formulated many promotional campaigns to attract the customers' attention. Various below the line marketing communication activities are done by these international giants to be constantly in the consideration set of the consumers. The various advantages that the consumer can get by patronising a particular company are constantly highlighted so that the customers can see the benefit of refuelling their vehicles from selected retail outlets of petroleum.

Exhibit 6.1: Marketing Communications of International Oil Marketing Companies





The merchandise and weekly contests organised by these companies help them attract a higher share of the customer’s wallet and also keep them well positioned in the customers mind.

SUMMARY

The way the international oil marketing companies work towards generating awareness amongst the customers either through their exciting offers or through contests and marketing communications can be emulated by the public sector oil marketing companies in India.

CHAPTER-6

COMPARISON OF BRAND BUILDING ACTIVITIES OF PSU OMCs IN INDIA WITH INTERNATIONAL OMCs

S.No	Contents	Page No.
6.1	Branded Petrol & Diesel	121
6.2	Loyalty Cards	125
6.3	Promotion Campaigns	128

CHAPTER-7

ANALYSIS OF DATA AND DATA INTERPRETATION

Contents	Page No.
7.1 Test of Validity and Reliability	135
7.2 Brand Awareness	137
7.3 Perceived Brand Quality	152
7.4 Brand Association	161
7.5 Brand Loyalty	186

CHAPTER 7

ANALYSIS OF DATA AND DATA INTERPRETATION

INTRODUCTION

Customer Based Brand Equity (CBBE) for the Public Sector Oil Marketing Companies was studied by understanding the brand awareness, perceived brand quality, brand association and brand loyalty expressed by the customers. This chapter elaborates upon the analysis and interpretation of data collected through primary survey.

The population surveyed exhibited a normal distribution curve. Out of the total population surveyed 23.2% of the population had monthly income more than Rs.1,00,000/- pm, 40% of the respondents earned between Rs. 50,000/- pm to Rs. 1,00,000/- pm and rest 36.8% of the respondents earned less than Rs.50,000/- pm. 55.2% of the respondents were male and 44.8% were female respondents. Based on occupation of the respondents 37.9% of the respondents belonged to the service class, 23.5% respondents were into business, 24.8% respondents were housewives and 13.9% were students enrolled in graduate and post graduate courses. Based on the type of vehicle used, 39.2% of the respondents used a two wheeler while 60.8% of the respondents used a four wheeler for commuting. 28% of the respondents belonged to the age group of 18-28 years, 34.4% of the respondents were in the age group of 29-38 years, 22.9% of the respondents were in the age group of 39-48 years, 10% respondents belonged to the age group of 49-58 years and 4% of the respondents were in the age group of 59-68 years.

The literature points out that customer does not exhibit loyalty towards any oil marketing company and they prefer visiting the petrol pump which is enroute to their home or work place. Since all Public Sector oil marketing companies are dealing in the same product category and having identical prices for the product and almost the same format of brand building activities, it is assumed that they would be positioned equally in the customer's mind and also that there would not be any significant difference in the brand loyalty, awareness and association levels exhibited by the customers for these companies. The brand building initiatives have been for the masses and no specific income group seems to be targeted through the marketing communication and promotional campaigns. Based on the above assumptions following hypothesis were formulated for statistical testing:

Hypothesis 1

H₀: There is no significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies.

H₁: There is a significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies.

Hypothesis 2

H₀: There is no significant difference in the perceived quality of the petrol marketed by public sector oil marketing companies

H₁: There is a significant difference in the perceived quality of the petrol marketed by public sector oil marketing companies

Hypothesis 3

H₀: There is no significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies.

H₁: There is a significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies.

Hypothesis 4

H₀: There is no significant difference in the level of customer brand loyalty for the public sector oil marketing companies

H₁: There is a significant difference in the level of customer brand loyalty for the public sector oil marketing companies

7.1 TEST OF VALIDITY & RELIABILITY

Various researches carried out to measure customer based brand equity used the constructs of brand awareness, brand association, perceived brand quality and brand loyalty to study the same. Content and Predictive validity of the constructs for measuring customer based brand equity is established from similar studies where the customer based brand equity model proposed by Aaker and Keller in 1991,1996 has been empirically tested by Atilgan, Aksoy, and Akinci, 2005; Kim and Kim, 2004; Yoo, Donthu, and Lee, 2000. Studies based on customer based brand equity have been carried out by researchers on various sectors like hospitality, sportswear, beverage and fast food industry to understand brand equity from the customer's point of view. Study on customer based brand equity was carried out for hotel industry by Kayaman and Arasli in 2007 where the aim of the research was to explore the four brand equity components i.e. brand awareness, brand loyalty, perceived quality and brand image. Tong and Hawley in 2009 in their paper titled Measuring Customer Based Brand Equity: Empirical Evidence from the Sportswear market in China concluded that brand association and brand loyalty are influential dimensions of brand equity. Similar studies on brand position and brand loyalty were done for fast moving consumer goods (FMCG) (Buckinx, Van den Poel, 2005) and apparel industry (Voss, Godfrey and Seiders, 2010; Chazen,1996) where it was established that higher level of brand position and brand loyalty is directly linked to higher brand equity of the organization in the market. The theoretical concept developed by Aaker and Keller illustrated that a strong brand equity means that customers have high brand-name awareness, maintain a favourable brand image, perceive that the brand is of high quality, and are loyal to the brand. It is a cumulative effect of all these

constructs (which are to some extent associated with each other) which leads to a high customer based brand equity. The empirical study was designed to get customer inputs for each of the parameters i.e. brand awareness, perceived brand quality, brand association and brand loyalty to carry out the study of customer based brand equity for public sector oil marketing companies. The validity of the construct can further be established from the low to moderate coefficient of correlation ($r = 0.177$, $p = .001$) between brand loyalty and perceived brand quality; ($r = 0.179$, $p = .001$) between brand association and brand loyalty. Similar low correlation coefficients between other constructs as seen in table 7.1 reveal that these constructs are not highly correlated to each other and hence they cannot be used interchangeably for studying customer based brand equity.

Table 7.1: Correlation between the Constructs of Research

Construct	Brand Awareness	Perceived Brand Quality	Brand Association	Brand Loyalty
Brand Awareness	1			
Perceived Brand Quality	0.187	1		
Brand Association	0.322	0.093	1	
Brand Loyalty	0.242	0.177	0.179	1

The Levene's test statistics of $F = 1.485$ at $p = 0.224$ for homogeneity of variance reveals that the variance obtained in the study of construct of perceived quality is not significantly different from the population at large. Similar results were obtained for the other constructs which established that the variances obtained for the constructs under study would be applicable to the population at large. The Cronbach's alpha coefficient of 0.698 for the thirteen items used to study the constructs of customer based brand equity was obtained which established that the scale constructed was reliable to study the constructs.

7.2 **Brand Awareness of the Public Sector Oil Marketing Companies**

In order to study the brand awareness of the customers for the public sector oil marketing companies the respondents were asked to respond to the question “Which company sells petrol” (refer question 8, Appendix 1). This unaided recall of the company name by the respondents points towards the brand position occupied by the company in the minds of the customer. It is also an indication towards the top of the mind awareness (TOMA) level of the respondents. Table 7.2 indicating the responses received by the respondents’ points out that all companies are having a marginal presence in the consumers’ minds. The table points out that almost equal percentage of respondents have taken the name of each of the three public sector oil marketing company in the unaided brand recall indicating that neither of the oil marketing company enjoys a high top of the mind recall amongst the customers.

Table 7.2: Top of the Mind Brand Awareness for PSU OMCs

Company	Frequency	Percent
HPCL	130	34.7
BPCL	117	31.2
IOCL	117	31.2
Private company	11	2.9
Total	375	100.0

Although the table 7.2 points that all the companies are equally positioned in the minds of the customers but in order to understand whether customers belonging to different income, age, gender and occupation exhibit a similar pattern of brand awareness, analysis of variance test (ANOVA) was conducted. Table 7.3 shows the one way ANOVA table where significance of 0.000 is less than 0.05 and hence the null hypothesis of hypothesis 1 gets rejected as there is lack of sufficient evidence to state that there is no significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies. The results of ANOVA analysis clearly point out that there is significant difference in the awareness level of the customers for the oil marketing. Although table 7.2

depicting the top of the mind brand awareness of the customers showed almost equal level of brand position in the minds of the customers but upon carrying out analysis of variance it can be concluded that there exists a significant difference in the level of brand awareness exhibited by the customers for the public sector oil marketing companies and null hypothesis 1 therefore cannot be accepted.

Table 7.3: Variance for Income-wise Brand Awareness of OMCs

ANOVA					
Petrol company					
	Sum of Squares	Df	Mean Square	F	Sig.
Between Groups	26.912	2	13.456	19.634	.000
Within Groups	254.944	372	.685		
Total	281.856	374			

In order to identify this difference in the brand awareness levels amongst the respondents of different income groups, Post_Hoc test was carried out. The table 7.4 for the Post-Hoc test shows two subsets that are created based on the responses of the individuals towards the question “which company sells petrol”. Coding of the responses for the petroleum companies stated is as follows: “1” for HPCL, “2” for BPCL, “3” for IOCL and “4” if the response is a private company. As seen in the table 7.4, the income group having a monthly income less than Rs.50,000/- exhibits a higher top of the mind brand awareness for IOCL as their score of 2.48 is very close to the coding “3” for IOCL. This group is different from the other income levels. The middle income group belonging to the income bracket of Rs.50,000/- pm to Rs.1,00,000/- pm showed a higher top of the mind awareness for BPCL with their scores of 1.91 being very close to the coding “2” for BPCL. The high income group with an income above 1,00,000/- pm also had a higher brand positioning for BPCL with their score of 1.95 being close to coding of “2” for BPCL.

BPCL has a higher positioning in the minds of the customers of middle income group and higher income group whereas the people belonging to the

category of lower middle to lower income group have a higher brand position for IOCL. Thus based on the results of ANOVA and Post Hoc test there is lack of sufficient evidence to accept the null hypothesis and it can therefore be stated that there is a significant difference in the brand awareness exhibited by the customers belonging to different income levels for the public sector oil marketing companies and that these companies are positioned differently amongst the different income levels.

Table 7.4: Difference in Income-wise Brand Awareness of OMCs

Petrol company			
Tukey Homogeneous Subset Displayed			
Income interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	1.91	
Above 1,00,000 pm	87	1.95	
Less than 50,000 pm	138		2.48
Sig.		.899	1.000

The respondents had to further identify the punch lines of the public sector oil marketing companies which are used in marketing communication messages (refer question 16, Appendix 1). The responses received for the awareness of the punch lines can be seen in table 7.5.

Table 7.5: Awareness of the Tag Lines of OMCs

Tag Line	Correct Response	False Response
	Percentage	Percentage
Bringing Energy to Life	10.4	89.6
Club HP	58.7	41.3
Pure for Sure	18.9	81.1
Achcha Lagta Hai	0	100
Go Out and Play	0	100
Pure Bhi Poora Bhi	6.1	93.9
High Performance Petrol	24.3	75.8

It can be seen that the punch line “Club HP” received the highest correct responses of 58.7% followed by the punch line “High Performance Petrol” for

Speed by BPCL. For the rest of the punch lines the awareness percentage was very low as seen in the table 7.5.

Table 7.6 depicting the awareness percentage of punch lines and their association by the respondents with other OMCs shows that there is higher percentage of incorrect responses and no answers indicating that the customers could not recall the marketing communication messages of the oil marketing companies. About 97% of the respondents could not identify the tag line “Achcha Lagta Hai” of HPCL and the tag line “Go Out and Play” of IOCL. “Club HP” tag line was the most remembered tag line and received 58.7% correct responses. Also the respondents either gave the correct answer or could not answer at all. They did not associate this tag line with any other company.

Table 7.6: Company-wise Linkage of Tag Lines

Company wise linkage of Marketing communication				
Tag Line (Company Name)	HPCL (%)	BPCL (%)	IOCL (%)	No Answer (%)
Bringing Energy to Life (IOCL)	3.5	2.7	*10.4	83.5
Club HP (HPCL)	*58.7	0	0	41.3
Pure for Sure (BPCL)	2.7	*18.9	4	74.4
Achcha Lagta Hai (HPCL)	*2.7	0	0	97.3
Go Out and Play (IOCL)	2.7	0	*0	97.3
Pure Bhi Poora Bhi (IOCL)	9.3	9.6	*6.1	75
High Performance Petrol (BPCL)	14.1	*24.3	14.1	47.5
* Correct response percentage				

The brand names of line extensions for petrol for the three public sector oil marketing companies were included in the questionnaire and the respondents were asked to identify the company to which these brands belonged to from the list of alternatives given (refer question 18, Appendix 1). 40.3% of the respondents could correctly associate the branded petrol –Speed from BPCL followed by 34.1% correct responses for Xtrapremium from IOCL and 25.1% correct responses for Power from HPCL. More than 59% of the respondents could not correctly recollect the name of the branded petrol with the parent oil marketing company. (refer to table 7.7).

Table 7.7: Awareness of Petrol Brands of OMCs

Petrol brands	Correct Response	False Response
	(%)	(%)
Speed (BPCL)	40.3	59.7
Power (HPCL)	25.1	74.9
Xtrapremium (IOCL)	34.1	65.9

As seen from the table 7.8, although 34.1% of the respondents correctly associated the Xtrapremium brand name with IOCL, 27.2% of the respondents wrongly associated it with HPCL and 28.8% of the respondents wrongly associated it with BPCL.

Table 7.8: Company-wise Linkage of Petrol Brands

Petrol brands	HPCL	BPCL	IOCL	No Idea
	(%)	(%)	(%)	(%)
Speed (BPCL)	8.5	*40.3	16.3	34.9
Xtrapremium (IOCL)	27.2	28.8	*34.1	9.9
Power (HPCL)	*25.1	26.7	11.7	36.5
* Correct Response Percentage				

When asked to identify the company based on their convenience stores, higher percentage of incorrect responses were observed indicating towards a very low association of the names of the brand extensions with the oil marketing companies. Table 7.9 shows that the highest recall was of the In & Out convenience stores of BPCL (35.2% correct responses) and a low recall of the other two convenience stores from IOCL (10.1% correct responses) and HPCL (6.9% correct responses).

Table 7.9: Awareness of Convenience Stores of OMCs

Convenience Store	Correct Response	False Response
	(%)	(%)
In & Out Store (BPCL)	35.2	64.8
Care (IOCL)	10.1	89.9
Speedmart (HPCL)	6.9	93.1

There were a high percentage of respondents who had no idea about the parent company for the convenience store as is depicted in table 7.10, indicating that

despite an aided brand recall methodology; the respondents exhibited a poor brand recall for the convenience stores.

Table 7.10: Company-wise Linkage of Convenience Stores

Convenience store	HPCL (%)	BPCL (%)	IOCL (%)	No Idea (%)
In & Out Store (BPCL)	26.9	*35.2	10.4	27.5
Care (IOCL)	10.9	10.7	*10.1	68.2
Speedmart (HPCL)	*6.9	21.3	11.5	60.3
* Correct Response Percentage				

The aided recall of the promotion campaigns of these companies also were extremely on the lower side with less than 20% of the customers giving correct responses (see table 7.11).

Table 7.11: Awareness of Promotion Campaigns of OMCs

Promotion campaigns	Correct Response (%)	False Response (%)
Bhar Bhar Ke Jeeto (HPCL)	17.1	82.9
Bharo Petrol Chalo London (BPCL)	5.9	94.1
Saal Bhar Free Fuel (IOCL)	12	88

As seen in the table 7.12, more than 62% of the customers had never heard of such promotional campaigns being run by the oil marketing companies. Qualitative responses from the respondents indicated that had they known that such promotional schemes were being executed, they would have patronized that particular oil company for the purchase of their fuel.

Table 7.12: Company-wise Linkage of Promotion Campaigns

Promotion Campaigns	HPCL (%)	BPCL (%)	IOCL (%)	No Idea (%)
Bhar Bhar Ke Jeeto (HPCL)	*17.1	14.1	6.7	62.1
Bharo Petrol Chalo London (BPCL)	18.4	*5.9	13.6	62.1
Saal Bhar Free Fuel (IOCL)	6.1	15.2	*12	66.7
* Correct Response Percentage				

Each of the Public Sector Oil Marketing Company has been promoting their loyalty cards to the customers to encourage repeat purchase of fuel from the

company outlet and thereby increase their loyalty. The aided brand recall of the parent company based on the name of the loyalty card also depicted a poor brand awareness of these cards by the respondents. As seen from tables 7.13 and 7.14, more than 69% of the customers exhibited a very weak brand recall of the loyalty cards offered by these companies.

Table 7.13: Awareness of Loyalty Cards of OMCs

Loyalty cards	Correct Response (%)	False Response (%)
Petrocard (BPCL)	10.9	89.4
i-mint card (HPCL)	16.5	83.5
Xtrarewards card (IOCL)	30.7	69.3

Table 7.14: Company-wise Linkage of Loyalty Cards

Loyalty cards	HPCL (%)	BPCL (%)	IOCL (%)	No Idea (%)
Petrocard (BPCL)	19.7	*10.9	26.7	42.7
i-mint card (HPCL)	*16.5	11.2	6.9	65.4
Xtrarewards card (IOCL)	9.6	15.2	*30.7	44.5
* Correct Response Percentage				

About 26.7% of the respondents believed that Petrocard was issued by IOCL instead of BPCL (refer table 7.14). Such weak brand awareness of the line and brand extensions of the oil marketing companies by the respondents points towards the fact that these companies need to find out more ways to increase their brand awareness.

Thus amongst the petrol brands the respondents exhibited the highest awareness for Speed with 40.3% correct response. For convenience stores the highest awareness was for In & Out stores which received 35.2% of correct responses. The promotional campaign by HPCL “Bhar Bhar Ke Jeeto” received the highest awareness scores of 17.1% and amongst the loyalty cards, the Xtrarewards card by IOCL had the highest awareness level amongst the respondents as it received 30.7% correct responses.

The data was further analysed to study if there existed significant difference in the brand awareness of the customers belonging to different income levels. Crosstabulation analysis was carried out to study the income wise difference in the awareness of the customers for the petrol brands, convenience stores, loyalty cards and promotional campaigns of the public sector oil marketing companies.

It can be seen from table 7.15 that the respondents having a monthly income between Rs. 50,000/- to Rs. 1,00,000/- scored higher on correct responses for awareness of branded fuel of the oil marketing companies. The respondents from this income group also had higher percentage of correct responses for the awareness of loyalty cards issued by these companies.

Table 7.15: Awareness of OMCs Based on Income of Respondents

Income wise Percentage of Correct Responses			
Awareness Parameters	Above 1,00,000/- pm (%)	Between 50,000- 1,00,000/- pm (%)	Less than 50,000/- pm (%)
Bringing Energy to Life (IOCL)	12.6	14.7	4.3
Club HP(HPCL)	62.1	70.7	43.2
Pure For Sure (BPCL)	13.8	22.7	18.1
Achcha Lagta Hai (HPCL)	0	0	0
Go Out & Play(IOCL)	0	0	0
Pure Bhi Poora Bhi (IOCL)	2.3	9.3	5.1
High Performance Petrol (BPCL)	14.9	14.0	41.3
Speed (BPCL)	48	65	58
Xtrapremium (IOCL)	39	64	64
Power (HPCL)	35	76	44
Petrocard (BPCL)	6	18	26
i-mint card (HPCL)	5	35	22
Xtrarewards card (IOCL)	11	62	42
In & Out Store (BPCL)	26	73	33
Care (IOCL)	12	0	26
Speedmart (HPCL)	2	11	13
Bhar Bhar Ke Jeeto (HPCL)	6	18	40
Bharo Petrol Chalo London (BPCL)	13	3	6
Saal Bhar Free Fuel (IOCL)	12	9	24

The respondents from this income group exhibited high awareness for the In & Out store of BPCL. The respondents having monthly income less than Rs. 50,000/- pm exhibited higher awareness for the promotional schemes run by IOCL and HPCL. The respondents belonging to the income group between Rs. 50,000/- to Rs. 1,00,000/- pm exhibited a higher awareness for the tag lines of the companies as compared to the other income groups.

The awareness level of the respondents was also crosstabulated with the type of vehicle owned by the respondent to understand the variation in the correct responses given by the respondents owning 2 wheelers and those owning a 4 wheeler.

Table 7.16 depicts that there is an overall higher percentage of correct responses given by the respondents having a four wheeler for all the tag lines in the questionnaire except for the “High Performance” tag line of BPCL which received higher percentage of correct responses from those owning a two wheeler. The highest awareness (65.35% correct responses) for the tag lines was for “Club HP” exhibited by the respondents using a 4 wheeler for commuting.

Table 7.16: Awareness of Tag Lines Based on Type of Vehicle Used by Respondents

Tag Line	Correct Response by 2 Wheeler users (%)	Correct Response by 4 Wheeler users (%)
Bringing Energy to Life (IOCL)	5.4	13.6
Club HP (HPCL)	48.29	65.35
Pure for Sure (BPCL)	17.7	19.7
Achcha Lagta Hai (HPCL)	0	0
Go Out and Play (IOCL)	0	0
Pure Bhi Poora Bhi (IOCL)	4.08	7.4
High Performance Petrol (BPCL)	33.3	18.4

The awareness of Xtrapremium brand of petrol from IOCL was higher amongst the 2 wheeler owners. Power brand of petrol from HPCL received higher awareness amongst 4 wheeler owners as compared to 2 wheeler owners

whereas there was almost an equal awareness of Speed from BPCL amongst both the categories of respondents as seen in table 7.17.

Table 7.17: Awareness of Petrol Brands Based on Type of Vehicle Used by Respondents

Petrol brands	Correct Response by 2 Wheeler users (%)	Correct Response by 4 Wheeler users (%)
Speed (BPCL)	45.5	45.6
Power (HPCL)	36.7	41.2
Xtrapremium (IOCL)	49.6	41.2

The respondents having 2 wheelers were more aware of the brand name of convenience store of IOCL (19% correct responses by respondents having a two wheeler). On the other hand the convenience stores of BPCL and HPCL had a high awareness amongst the respondents having a 4 wheeler as compared to those using a 2 wheeler for commuting (refer to table 7.18). The highest awareness for the convenience stores was for the In & Out stores of BPCL which received 43.4% correct responses from the respondents using a four wheeler for commuting.

Table 7.18: Awareness of Convenience Stores Based on Type of Vehicle Used by Respondents

Convenience Store	Correct Response by 2 Wheeler users (%)	Correct Response by 4 Wheeler users (%)
In & Out Store (BPCL)	22.4	43.4
Care (IOCL)	19	4
Speedmart (HPCL)	4.08	8.7

A similar pattern of awareness level was exhibited when it came to analysing awareness level of the respondents about the promotional activities carried out by the public sector oil marketing companies. Here too the respondents having a two wheeler were more aware of the promotional activity carried out by IOCL. The respondents having 4 wheelers were more aware of the promotional activities by HPCL (11.8% correct responses) and BPCL (7.01%

correct responses) from the respondents using a 4 wheeler for commuting (see table 7.19). There was higher awareness was for the promotion campaign of “Bhar Bhar Ke Jeeto” by HPCL as compared to “Bharo Petrol Chalo London” by BPCL. The promotion campaign of IOCL- “Saal Bhar Free Fuel” was remembered more by the respondents using a 2 wheeler for commuting.

Table 7.19: Awareness of Promotional Campaigns Based on Type of Vehicle Used by Respondents

Promotion campaigns	Correct Response by 2 Wheeler users (%)	Correct Response by 4 Wheeler users (%)
Bhar Bhar Ke Jeeto (HPCL)	25	11.8
Bharo Petrol Chalo London (BPCL)	4.08	7.01
Saal Bhar Free Fuel (IOCL)	13.6	10.9

The highest awareness amongst the respondents owning a four wheeler for the loyalty cards issued by these companies was for Xtrarewards card by IOCL which can be seen in table 7.20 where the correct responses by this segment of respondents is 31.1% as compared to just 4.8% correct responses by people using a 2 wheeler.

Table 7.20: Awareness of Loyalty Cards Based on the Type of Vehicle Used by Respondents

Loyalty cards	Correct Response by 2 Wheeler users (%)	Correct Response by 4 Wheeler users (%)
Petrocard (BPCL)	12.2	14
i-mint card (HPCL)	17	16.2
Xtrarewards card (IOCL)	4.8	31.1

When crosstabulation analysis was done to understand the difference in the awareness levels of the respondents based on their occupation, it was observed that “Achcha Lagta Hai” and “Go Out and Play” tag lines of HPCL and IOCL did not have any recall amongst the respondents. The student community exhibited the highest awareness (44.2% correct responses) for “Pure For Sure” tag line of BPCL and “Pure Bhi Poora Bhi” tag line for BPCL (80.8% correct

responses), while the housewives remembered “Club HP” tag line exhibiting 100% correct responses for this tag line (refer table 7.21).

Highest awareness for branded petrol was for Speed by BPCL and the business class respondents gave the maximum number of correct responses (59.1%) for this brand of petrol. For the awareness level of convenience stores, 52.7% of the correct responses were given by the housewives for In & Out store of BPCL. The housewives also exhibited a higher awareness for the “Bhar Bhar Ke Jeeto” promotional campaign by HPCL. The highest awareness exhibited for the loyalty cards was for Xtrarewards loyalty cards from IOCL with 69.2% correct responses coming from the student respondents.

Table 7.21: Awareness Level of Respondents Based on their Occupation

Awareness Parameters	Correct Response by Service class (%)	Correct Response by Business Class (%)	Correct Response by Housewives (%)	Correct Response by Students (%)
Bringing Energy to Life (IOCL)	7.7	17	13.9	0
Club HP (HPCL)	28.8	86.4	100	23.8
Pure for Sure (BPCL)	16.2	17	10.8	44.2
Achcha Lagta Hai (HPCL)	0	0	0	0
Go Out and Play (IOCL)	0	0	0	0
Pure Bhi Poora Bhi (IOCL)	0	14.8	0	19.2
High Performance Petrol (BPCL)	16.9	17	10.8	80.8
Speed (BPCL)	37.3	59.1	58.1	23.1
Power (HPCL)	45.8	39.7	33.3	46.2
Xtrapremium (IOCL)	49.9	50	51.6	26.9
In & Out Store (BPCL)	27.4	35.2	52.7	25
Care (IOCL)	9.2	13.6	0	25
Speedmart (HPCL)	0	0	10.8	30.8
Bhar Bhar Ke Jeeto (HPCL)	8.4	11.36	31.2	25
Bharo Petrol Chal London (BPCL)	0	25	0	0
Saal Bhar Free Fuel (IOCL)	8.4	22.7	0	25
Petrocard (BPCL)	21.1	4.5	3.2	25
i-mint card (HPCL)	16.2	0	41.2	0
Xtrarewards card (IOCL)	19	18.2	38.7	69.2

Crosstabulation analysis as depicted in table 7.22 depicts the difference in the awareness levels of the respondents based upon their gender. It can be seen that overall the female respondents had a higher awareness of the premium fuels as compared to the male respondents. The female respondents were also more aware of the tag lines of the oil marketing companies. The females exhibited higher awareness of the loyalty cards from HPCL and IOCL whereas the male respondents gave higher percentage of correct answers for the loyalty cards offered by BPCL. In & Out convenience stores had the highest awareness among the female respondents. The “Saal Bhar Free Fuel” promotional campaign of IOCL had the highest recall amongst the male respondents while the female respondents remembered the “Bhar Bhar Ke Jeeto” campaign of HPCL.

Table 7.22: Awareness Level of the Respondents Based on their Gender

Awareness Parameters	Male correct response (%)	Female correct response (%)
Bringing Energy to Life (IOCL)	6.3	15.5
Club HP (HPCL)	50.2	69.0
Pure for Sure (BPCL)	12.1	27.4
Achcha Lagta Hai (HPCL)	0	0
Go Out and Play (IOCL)	0	0
Pure Bhi Poora Bhi (IOCL)	0	13.7
High Performance Petrol (BPCL)	20.3	29.2
Speed (BPCL)	37.7	55.4
Power (HPCL)	40.6	42.3
Xtrapremium (IOCL)	37.2	53.6
In & Out Store (BPCL)	27.5	44.6
Care (IOCL)	12.1	7.7
Speedmart (HPCL)	7.7	6.0
Bhar Bhar Ke Jeeto (HPCL)	10.6	25.0
Bharo Petrol Chalo London (BPCL)	10.6	0
Saal Bhar Free Fuel (IOCL)	15.5	7.7
Petrocard (BPCL)	15.9	10.1
i-mint card (HPCL)	11.1	23.2
Xtrarewards card (IOCL)	15.5	49.4

Table 7.23 highlights the difference in the awareness levels of the respondents of different age intervals. The respondents in the age group of 18-28 years

exhibited a higher awareness for the loyalty cards and promotional schemes of IOCL. Overall too this age group had a higher level of awareness as compared to other age groups.

Table 7.23: Awareness Level of Respondents Based on their Age groups

Awareness Parameters	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Bringing Energy to Life (IOCL)	8.6	7.8	4.7	40.0	0
Club HP (HPCL)	36.2	58.9	83.7	75.0	26.7
Pure for Sure (BPCL)	29.5	19.4	8.1	17.5	6.7
Achcha Lagta Hai (HPCL)	Nil	Nil	Nil	Nil	Nil
Go Out and Play (IOCL)	Nil	Nil	Nil	Nil	Nil
Pure Bhi Poora Bhi (IOCL)	8.6	7.8	2.3	5.0	0
High Performance Petrol (BPCL)	51.4	18.6	5.8	17.5	6.7
Speed (BPCL)	36	59	41	31	4
Power (HPCL)	72.5	38.8	34.9	36.2	53.3
Xtrapremium (IOCL)	41.9	53.5	29.1	52.5	53.3
In & Out Store (BPCL)	22.9	35.7	44.2	52.5	20.0
Care (IOCL)	15.2	12.4	2.3	10.0	0
Speedmart (HPCL)	15.2	0	11.6	0	0
Bhar Bhar Ke Jeeto (HPCL)	13.3	20.2	12.8	32.5	0
Bharo Petrol Chalo London (BPCL)	0	4.7	14.0	10.0	0
Saal Bhar Free Fuel (IOCL)	18.6	7.8	17.1	2.5	0
Petrocard (BPCL)	18.6	10.9	13.3	12.5	6.7
i-mint card (HPCL)	1.0	20.2	14.0	32.5	66.7
Xtrarewards card (IOCL)	50.0	23.3	34.3	7.5	20.0

Table 7.24 and exhibit 7.1 give an overall picture of the awareness level exhibited by the respondents for the three oil marketing companies under study. HPCL leads in the awareness of the taglines of this company by the customers. The respondents still remembered the “Club HP- Achcha Lagta Hai” brand campaigns of HPCL. The highest level of awareness for the loyalty cards was for IOCL Xtrarewards cards. In terms of awareness of the convenience stores, BPCL was the leader with the highest percentage of respondents being able to correctly recall the In & Out convenience stores of

BPCL. The company also enjoyed the highest awareness of the respondents for its branded petrol “Speed”. The promotional campaign of HPCL received the highest awareness level (see table 7.24).

Table 7.24: Company-wise Brand Awareness Exhibited by Respondents

Brand Awareness Parameters	Correct Response	Correct Response	Correct response
	HPCL (%)	BPCL (%)	ICOL (%)
Taglines	58.7	24.3	18.9
Loyalty Cards	16.5	10.9	30.7
Convenience Stores	6.9	35.2	10.1
Branded Petrol	25.1	40.3	34.1
Promotional campaigns	17.1	5.9	12

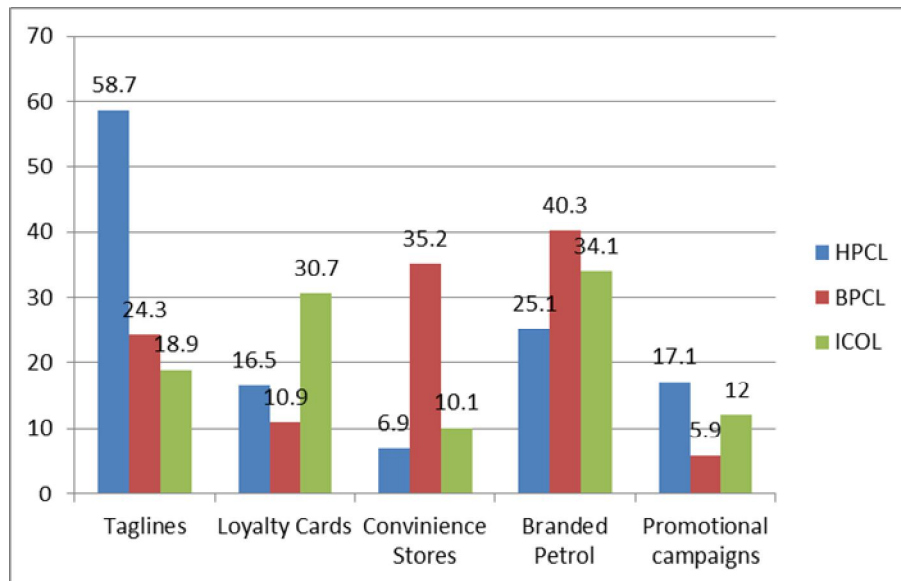


Exhibit 7.1: Company-wise Brand Awareness Exhibited by Customers

(X-axis represents awareness dimensions and Y-axis represents the percentage of correct response)

Thus where on one hand HPCL enjoyed the highest awareness of its tag line and promotional campaign, it received the least awareness for its branded petrol and convenience stores. Similarly IOCL had highest awareness for its loyalty card but had the least awareness for its tag line amongst the three

companies. BPCL had the highest awareness for its branded petrol but the least awareness for its loyalty cards and promotional campaigns.

7.3 Perceived Brand Quality of Petrol Marketed by Public Sector Oil Marketing Companies

A five point likert scale was used to study the perceived brand quality of the fuel offered by the oil marketing companies. The respondents were asked to express their perception of the quality of fuel offered by these companies on a likert scale ranging from superior quality to worst quality. One way ANOVA was carried out to study if the customers belonging to different income groups perceived the quality of the fuel offered by the public sector oil marketing companies differently. As seen from Table 7.25, the significance level is more than 0.05 and hence it can be concluded that there is not sufficient evidence available to reject the null hypothesis.

Table 7.25: Analysis of Variance for Perceived Quality of Petrol

ANOVA						
		Sum of Squares	df	Mean Square	F	Sig.
Perceived quality HPCL	Between Groups	.764	2	.382	.803	.449
	Within Groups	177.113	372	.476		
	Total	177.877	374			
Perceived quality BPCL	Between Groups	.515	2	.258	.652	.522
	Within Groups	147.085	372	.395		
	Total	147.600	374			
Perceived quality IOCL	Between Groups	1.320	2	.660	1.882	.154
	Within Groups	130.398	372	.351		
	Total	131.717	374			

Hence the null hypothesis of hypothesis 2 that there is no significant difference in the perceived quality of the products of public sector oil marketing companies is accepted and it can be concluded that though these

companies claim to provide superior quality branded fuel with additives but they are not able to differentiate their offering amongst the customers. As a result of this there is poor positioning of the brands in terms of quality of fuel offered and no public sector oil marketing company comes out as a clear winner.

Crosstabulation analysis is carried out to analyse the responses received by the customer groups based on their differences in income, vehicle owned, occupation and gender. There is a very similar perception about the quality of fuels offered by each of the public sector oil marketing companies as is depicted in table 7.26 for HPCL, table 7.27 for BPCL and table 7.28 for IOCL.

Table 7.26: Perceived Quality of Petrol from HPCL by Income Groups

Response percentage for Perceived Quality of HPCL fuels by different Income groups					
Income	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Above Rs1,00,000/- pm	4.6	44.8	47.1	3.4	0
Between 50,000/- to Rs. 1,00,000/- pm	8.7	42.7	44.7	4	0
< Rs. 50,000/- pm	10.1	44.2	43.5	2.2	0

Table 7.27: Perceived Quality of Petrol from BPCL by Income Groups

Response percentage for Perceived Quality of BPCL fuels by different Income Groups					
Income	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Above Rs1,00,000/- pm	9.2	36.8	51.7	2.3	0
Between 50,000/- to Rs. 1,00,000/- pm	4	43.3	50.7	2	0
< Rs. 50,000/- pm	3.6	38.4	55.8	2.2	0

Table 7.28: Perceived Quality of Petrol from IOCL by Income Groups

Response percentage for Perceived Quality of IOCL by different Income Groups					
Income	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Above Rs1,00,000/- pm	8	44.8	46	1.1	0
Between 50,000/- to Rs. 1,00,000/- pm	1.3	46.7	49.3	2.7	0
< Rs. 50,000/- pm	2.2	42	54.3	1.4	0

Although ANOVA analysis indicated that there is no significant difference in the perception of the fuel quality based on the type of vehicle owned by the respondents but through crosstabulation analysis the degree of difference in the responses can be studied. Although a larger percentage of the respondents could not comment on the quality of fuel marketed by these companies, still a higher percentage of the respondents having 2 wheelers perceived that HPCL marketed good quality fuels (refer table 7.29)

Table 7.29: Perceived Quality of Petrol from HPCL Based on Vehicle Used

Response percentage for Perceived Quality of HPCL fuels by different vehicle users					
Vehicle type	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
2 wheeler respondents	9.5	50.3	38.8	1.4	0
4 wheeler respondents	7.5	39.5	48.7	4.4	0

The responses received for the quality of fuels marketed by BPCL were very similar from both the categories of respondents i.e. those having 2 wheelers and those having 4 wheelers. Table 7.30 depicts that both the categories of respondents had similar perceptions about the quality of fuels marketed by BPCL.

Table 7.30: Perceived Quality of Petrol from BPCL Based on Vehicle Used

Response percentage for Perceived Quality of BPCL fuels by different vehicle users					
Vehicle type	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
2 wheeler respondents	5.4	40.1	50.3	4.1	0
4 wheeler respondents	4.8	39.9	54.4	0.9	0

A higher percentage (50.3%) of respondents having 2 wheelers felt that IOCL marketed good quality of fuel (refer to table 7.31). The response percentage was very similar to that of HPCL good quality fuel response by the respondents having 2 wheelers. None of the respondents said that the quality of petrol marketed by any of the oil marketing company was of worst quality. A negligible percentage of respondents said that the petrol was of bad quality.

More than 45% of the respondents could not comment on the quality of petrol marketed by these companies (refer to table 7.31)

Table 7.31: Perceived Quality of Petrol from IOCL based on Vehicle Used

Response percentage for Perceived Quality of IOCL fuels by different vehicle users					
Vehicle type	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
2 wheeler respondents	0.7	50.3	45.6	3.4	0
4 wheeler respondents	4.8	40.8	53.5	0.9	0

Thus overall a higher percentage of respondents having 2 wheeler perceived the quality of fuels marketed by the three oil marketing companies were good. As compared to the respondents having 2 wheelers a lesser percentage of 4 wheeler owners perceived that the fuels marketed by the oil marketing companies were of good quality.

Gender based crosstabulation analysis results on the perceived quality of fuel indicated that a higher percentage of male respondents perceived HPCL fuels having good quality whereas the female respondents rated BPCL and IOCL fuels to be of better quality (refer to tables 7.32, 7.33 and 7.34).

Table 7.32: Gender-wise Perceived Quality of Petrol from HPCL

Gender wise Response percentage for Perceived Quality of HPCL fuels					
Gender	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Male	4.8	45.9	45.9	3.4	0
Female	12.5	41.1	43.5	3	0

Table 7.33: Gender-wise Perceived Quality of Petrol from BPCL

Gender wise Response percentage for Perceived Quality of BPCL fuels					
Gender	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Male	4.8	34.8	57.5	2.9	0
Female	5.4	46.4	47	1.2	0

Table 7.34: Gender-wise Perceived Quality of Petrol from IOCL

Gender wise Response percentage for Perceived Quality of IOCL fuels					
Gender	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Male	3.9	44	50.2	1.9	0
Female	2.4	45.2	50.6	1.8	0

The housewives rated the fuel of HPCL to be of superior quality and their rating for this superior quality was much higher than the ratings for superior quality by other occupation groups (refer to table 7.35).

Table 7.35: Occupation-wise Perceived Quality of Petrol from HPCL

Occupation wise Response percentage for Perceived Quality of HPCL fuels					
Occupation	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Service	7	45.8	42.3	4.9	0
Business	2.3	43.2	52.3	2.3	0
Housewife	16.1	38.7	44.1	1.1	0
Student	7.7	48.1	40.4	3.8	0

46.2% of the housewives rated the fuel marketed by BPCL to be of good quality. The percentage of respondents from other occupational areas was very close for rating BPCL fuels as having good quality (refer to table 7.36). As seen in table 7.36, higher percentage of respondents (more than 50%) from each occupational group could not comment on the quality of fuel marketed by BPCL.

Table 7.36: Occupation-wise Perceived Quality of Petrol from BPCL

Occupation wise Response percentage for Perceived Quality of BPCL fuels					
Occupation	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Service	5.6	37.3	54.2	2.8	0
Business	5.7	39.8	53.4	1.1	0
Housewife	4.3	46.2	49.5	0	0
Student	3.8	36.5	53.8	5.8	0

Similar responses were obtained for the quality rating of fuels marketed by IOCL. As seen in table 7.37, more than 45% of the respondents were unable to comment on the quality of fuels marketed by IOCL. There was very similar level of agreement amongst the respondents belonging to business class and housewives with the perception of good quality of petrol marketed by IOCL (see table 7.37).

Table 7.37: Occupation-wise Perceived Quality of Petrol from IOCL

Occupation wise Response percentage for Perceived Quality of IOCL fuels					
Occupation	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Service	2.1	43.7	50.7	3.5	0
Business	8	46.6	45.5	0	0
Housewife	1.1	47.3	49.5	2.2	0
Student	1.9	38.5	59.6	0	0

A higher percentage of the respondents (51.4%) belonging to the age group of 18-28 years perceived the quality of petrol marketed by HPCL to be of good quality. This was followed by very similar responses by the age groups of 29-38 years and 39-48 years for good quality perception of petrol marketed by HPCL (refer to table 7.38)

Table 7.38: Age-wise Perceived Quality of Petrol from HPCL

Age wise Response percentage for Perceived Quality of HPCL fuels					
Quality	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Superior	3.8	7.8	11.6	15.0	6.7
Good	51.4	41.1	43.0	47.5	6.7
Can't Say	41.9	47.3	45.3	37.5	60.0
Bad	2.9	3.9	0	0	26.7

In case of perceived quality of petrol marketed by BPCL, again the respondents in the age group of 18-28 years showed the highest level of agreement for the good quality of the petrol (refer to table 7.39)

Table 7.39: Age-wise Perceived Quality of Petrol from BPCL

Age wise Response percentage for Perceived Quality of BPCL fuels					
Quality	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Superior	4.8	5.4	4.7	7.5	0
Good	43.8	38.0	40.7	37.5	33.3
Can't Say	48.6	55.0	53.5	55.0	53.3
Bad	2.9	1.6	1.2	0	13.3

In case of quality perception for petrol marketed by IOCL, the respondents of the age group of 18-28 years and those in the age group of 29-38 years had

similar level of agreement for good quality of petrol being marketed by the company (refer to table 7.40).

Table 7.40: Age-wise Perceived Quality of Petrol from IOCL

Age wise Response percentage for Perceived Quality of IOCL fuels					
Quality	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Superior	1.9	3.1	3.5	5.0	6.7
Good	48.6	47.3	39.5	45.0	20.0
Can't Say	48.6	48.8	54.7	47.5	60.0
Bad	1.0	.8	2.3	2.5	13.3

Most of the respondents could not comment on the quality of the non-fuel facilities offered at the retail outlets of HPCL, BPCL and IOCL. As seen in table 7.41, highest percentage of the respondents (62.3%) of the respondents commented that the air filling facilities at HPCL outlets were good. Most of the respondents could not comment much about the non-fuel facilities as they had not availed of the same.

Table 7.41: Perceived Quality of Non-fuel Facilities at HPCL outlets

Response percentage for Perceived Quality of Non-fuel Facilities at HPCL outlets					
Non-Fuel Facilities	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Air Filling	11.8	62.3	20.7	5.2	Nil
Drinking Water	Nil	12.0	75.8	8.5	3.7
Wash Room	Nil	Nil	67.5	20.0	12.5
Tyre Change	Nil	Nil	92.5	7.5	Nil
Convenience Store	Nil	20.7	40.8	25.5	13.0
Oil Change	0.5	4.5	95.0	Nil	Nil
Service of Sales Personnel	Nil	19.0	40.2	40.8	Nil
Others (Like ATM, Florist, Eating Joints etc.)	Nil	87.8	8.0	4.2	Nil

Amongst the non-fuel facilities available at BPCL outlets, 78.2% of the respondents claimed that the air filling facilities at BPCL outlets were good. This was followed by 65.2% of the respondents expressing that the service offered by the sales personnel were of good quality. 45.6% of the respondents

said that the convenience store facility offered at BPCL outlets were good (refer to table 7.42).

Table 7.42: Perceived Quality of Non-fuel Facilities at BPCL outlets

Response percentage for Perceived Quality of Non-fuel Facilities at HPCL outlets					
Non-Fuel Facilities	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Air Filling	Nil	78.2	9.8	12.0	Nil
Drinking Water	Nil	5.2	87.8	5.0	Nil
Wash Room	Nil	19.6	60.0	12.0	8.4
Tyre Change	Nil	1.5	98.5	Nil	Nil
Convenience Store	Nil	45.6	30.2	24.2	Nil
Oil Change	1.5	12.2	87.8	Nil	Nil
Service of Sales Personnel	3.0	65.2	14.5	17.3	Nil
Others (Like ATM, Florist, Eating Joints etc.)	6.0	77.6	16.4	Nil	Nil

In case of IOCL non-fuel facilities, air filling again received a good rating from the respondents. In case of IOCL maximum respondents could not comment on the quality of the services offered. As can be seen in table 7.43, less percentage of respondents rated the service offered by the sales personnel as good when compared to that of BPCL and HPCL. The facilities of washroom, drinking water and convenience stores were also very poorly rated by the respondents for IOCL.

Table 7.43: Perceived Quality of Non-fuel Facilities at IOCL outlets

Response percentage for Perceived Quality of Non-fuel Facilities at HPCL outlets					
Non-Fuel Facilities	Superior (%)	Good (%)	Can't Say (%)	Bad (%)	Worst (%)
Air Filling	8.0	80.0	12.0	Nil	Nil
Drinking Water	Nil	10.0	35.7	42.0	12.3
Wash Room	Nil	Nil	60.0	15.5	24.5
Tyre Change	Nil	Nil	97.3	2.7	Nil
Convenience Store	Nil	Nil	52.8	24.0	23.2
Oil Change	Nil	Nil	80.9	19.1	Nil
Service of Sales Personnel	Nil	15.6	67.9	16.5	Nil
Others (Like ATM, Florist, Eating Joints etc.)	1.8	22.7	67.6	7.9	Nil

The overall response for perceived quality for the petrol marketed by the public sector oil marketing companies indicates that a higher percentage of respondents perceived the quality of petrol marketed by HPCL to be of superior quality (refer to table 7.44)

Table 7.44: Perceived Quality of Petrol from OMCs by the Respondents

Company	Superior Quality (%)	Good Quality (%)	Can't Say (%)	Bad Quality (%)
HPCL	8.3	43.7	44.8	3.2
BPCL	5.1	40	52.8	2.1
IOCL	3.2	44.5	50.4	1.9

In order to achieve a score for comparing the perceived quality of the OMCs a weightage of 2 was given to Superior quality and a weightage of 1 was given to Good quality. The responses where the respondents could not comment anything about the quality of the petrol marketed by these companies were given a weightage of 0 and a weightage of -1 was given to the bad quality responses. Upon calculation it is observed in table 7.45 that the perceived quality of petrol of HPCL was higher than that of other two companies. This was followed by higher perceived quality for IOCL and lastly that of BPCL.

Table 7.45: Weighted Perceived Quality Scores of OMCs

Quality Parameters	HPCL	BPCL	IOCL
Superior Quality	8.30%	5.10%	3.20%
Weightage	2	2	2
Score	0.166	0.102	0.064
Good Quality	43.70%	40%	44.50%
Weightage	1	1	1
Score	0.437	0.4	0.445
Can't Say	44.80%	52.80%	50.40%
Weightage	0	0	0
Score	0	0	0
Bad quality	3.20%	2.10%	1.90%
Weightage	-1	-1	-1
Score	-0.032	-0.021	-0.019
Total Score	0.571	0.481	0.49

Thus based on the customer perception the perceived quality of petrol of HPCL is of a better quality than those marketed by IOCL and BPCL.

7.4 Brand Association of the Customers with the Public Sector Oil Marketing Companies

Free brand association technique employed to study the customer perception or the brand association of the customers with the public sector OMCs could not elicit very useful responses from the respondents. Qualitative responses were sought from the respondents about their feelings for each of the public sector oil marketing company in relation to the products offered, conduct of business and customer relations. The respondents were unable to voice out distinctive responses for each of the oil marketing company and free brand association technique generated responses like “good”, “all are the same”, “no difference” etc.

Since each of the oil marketing company claims of being focused towards achieving certain brand values with which the customers can associate, hence forced technique of studying brand association was also used where the respondents were presented with the brand values of each company (as stated in company literature) and the 5 point likert scale was used to record the customer level of agreement or association with these brand values.

Customer brand association with HPCL was studied for the items of High Quality, Personalised Vehicle care and Personalised customer care. Similarly the items of Innovation, Care and Reliability were used to measure the response of the consumers about the association of these brand values with BPCL. The items of Care, Innovation, Passion and Trust were used to measure the level of customer association with these brand values of IOCL. The responses for brand association were coded in the SPSS as 1 for “strongly agree”, 2 for “agree”, 3 for “neither agree nor disagree”, 4 for “disagree and 5 for “strongly disagree”. One way ANOVA test is carried out to study if there is a significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies. In the ANOVA table 7.46 the high F-statistic and the significance value of less than 0.05 indicates

that there is lack of evidence to accept the null hypothesis for hypothesis 3. Hence the null hypothesis is rejected and it can be inferred that there is a significant difference in the level of brand association exhibited by the customers for the public sector oil marketing companies.

Table 7.46: Analysis of Variance for Association with Brand Values

	Sum of Squares	Df	Mean Square	F	Sig.
High Quality HPCL	16.600	2	8.300	19.983	.000
Vehicle Care HPCL	23.092	2	11.546	19.567	.000
Customer Care HPCL	13.598	2	6.799	16.536	.000
Innovation BPCL	10.781	2	5.390	10.436	.000
Care BPCL	10.704	2	5.352	6.977	.001
Reliable BPCL	15.952	2	7.976	14.031	.000
Care IOCL	9.818	2	4.909	8.828	.000
Innovation IOCL	23.358	2	11.679	17.912	.000
Passion IOCL	22.169	2	11.084	11.644	.000
Trust IOCL	25.607	2	12.804	17.064	.000

Table 7.47 shows that the consumers having their income above 50,000/-pm agreed with the brand value of High quality for HPCL as their score can be rounded off to 2 which corresponds with the coding “2” for agreement with the brand values. The consumers with income below Rs. 50,000/- pm however neither agreed nor disagreed with the high quality brand value for HPCL as their score when rounded off comes to the coding “3” for neither agreeing nor disagreeing with the brand values. Further the consumers having a monthly income less than Rs. 50,000/- could not associate with any brand value of HPCL as they neither agreed nor disagreed with any of the brand value surveyed for HPCL.

Thus from table 7.47 it can be concluded that the respondents having monthly income above Rs. 50,000/- pm exhibited a similar level of association with the brand value of High Quality of HPCL.

Table 7.47: Income wise Difference in Association of “High Quality” Brand Value with HPCL

High quality HPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Above 1,00,000 pm	87	2.25	
Between 50,000-1,00,000 pm	150	2.33	
Less than 50,000 pm	138		2.73
Sig.		.653	1.000

Though Post Hoc tests for personalized vehicle care and customer care exhibit two distinct subsets but it is observed that the values for the degree of association with these brand values is almost uniform across all income groups (refer to table 7.48 and table 7.49) and points towards consumers neither agreeing nor disagreeing with these brand propositions of HPCL.

Table 7.48: Income-wise Difference in Association of “Vehicle Care” Brand Value with HPCL

Vehicle care HPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.57	
Above 1,00,000 pm	87		3.03
Less than 50,000 pm	138		3.09
Sig.		1.000	.822

The respondents having an income of less than Rs.50,000/- pm and those having income more than Rs. 1,00,000/- pm exhibited a similar level of agreement with associating “Customer Care” brand value with HPCL (refer to table 7.49).

Table 7.49: Income wise Difference in Association of “Customer Care” Brand Value with HPCL

Personalised Customer care HPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.74	
Less than 50,000 pm	138		3.07
Above 1,00,000 pm	87		3.20
Sig.		1.000	.264

Though the post Hoc tests for association of customers with the brand values of Innovation, Care and Reliable showed the difference in the association levels of different income groups of the customers, but the customers having income above Rs. 1,00,000/- per month agreed more with the brand value of Reliability of BPCL as compared to the other two brand values of Innovation and Care. The respondents largely neither agreed nor disagreed with the brand values of Innovation and Care of BPCL as their scores can be rounded off to 3 which corresponds to neither agree nor disagree with the brand value (refer to tables 7.50, 7.51 and 7.52)

Table 7.50: Income wise Difference in Association of “Innovation” Brand Value with BPCL

Innovation BPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.74	
Above 1,00,000 pm	87		3.06
Less than 50,000 pm	138		3.10
Sig.		1.000	.885

Table 7.51: Income wise Difference in Association of “Care” Brand Value with BPCL

Care BPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.66	
Above 1,00,000 pm	87		2.95
Less than 50,000 pm	138		3.03
Sig.		1.000	.788

Table 7.52: Income wise Difference in Association of “Reliable” Brand Value with BPCL

Reliable BPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Above 1,00,000 pm	87	2.39	
Between 50,000-1,00,000 pm	150	2.44	
Less than 50,000 pm	138		2.85
Sig.		.871	1.000

The Post Hoc tests for the consumer perception of the brand values of Care, Innovation, Passion and Trust confirmed that the respondents belonging to different income levels had varying level of brand associations with these brand values of IOCL. The respondents having income between Rs. 50,000/- pm to Rs. 1,00,000/- pm agreed that they could associate the brand value of Care with IOCL. The respondents having income below Rs. 50,000/- pm and those having income above Rs. 1,00,000/- pm exhibited neither an agreement nor a disagreement with the association of “Care” brand value with IOCL (refer to tables 7.53).

Table 7.53: Income wise Difference in Association of “Care” Brand Value with IOCL

Care IOCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.44	
Less than 50,000 pm	138		2.75
Above 1,00,000 pm	87		2.79
Sig.		1.000	.913

Table 7.54: Income wise Difference in Association of “Innovation” Brand Value with IOCL

Innovation IOCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.77	
Above 1,00,000 pm	87	2.93	
Less than 50,000 pm	138		3.33
Sig.		.292	1.000

Although income wise difference in the level of association with the brand values of Innovation and Passion is exhibited in the Post hoc tables 7.54 and 7.55, but the scores of different subsets are very close to the coding “3” pointing towards the fact that the respondents could not express a clear agreement or disagreement of associating these brand values with IOCL. However the responses of the customers having income between Rs. 50,000/- pm to Rs. 1,00,000/- pm and those earning more than Rs. 1,00,000/- pm responded in a similar manner as compared to those having income below Rs. 50,000/- pm.

Table 7.55: Income wise Difference in Association of “Passion” Brand Value with IOCL

Passion IOCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Between 50,000-1,00,000 pm	150	2.95	
Above 1,00,000 pm	87	3.10	
Less than 50,000 pm	138		3.49
Sig.		.433	1.000

Table 7.56 depicts that the respondents belonging to the income levels of below Rs. 50,000/- pm and those in the income bracket of Rs. 50,000/- to Rs. 1,00,000/- pm showed their agreement in associating the brand value of trust with IOCL. The respondents having a monthly income above Rs. 1,00,000/- neither agreed nor disagreed with associating the brand value of trust with IOCL.

Table 7.56: Income wise Difference in Association of “Trust” Brand Value with IOCL

Trust IOCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Less than 50,000 pm	138	2.33	
Between 50,000-1,00,000 pm	150	2.49	
Above 1,00,000 pm	87		3.01
Sig.		.363	1.000

The Post –hoc tests thus confirm that the respondents belonging to different income groups exhibited different levels of brand association with the various brand propositions of the public sector oil marketing companies. Hence the null hypothesis of hypothesis 3 gets rejected and it can be concluded that there is a significant difference in the level of association of the customers

belonging to different income levels with the public sector oil marketing companies.

Table 7.57 depicts the agreement level of the respondents with the brand values of the oil marketing companies. Although the respondents could not clearly differentiate between the brand values of the oil marketing companies, still based on various interactions with the oil marketing companies and upon being exposed to the various service elements and marketing communications the respondents could express their level of agreement with the brand values studied through the research.

Table 7.57: Agreement of Respondents with the Brand Values of OMCs

Agreement of Respondents with the Brand Values of OMCs					
Brand Values	Strongly Agree (%)	Agree (%)	Neither agree Nor Disagree (%)	Disagree (%)	Strongly disagree (%)
High Quality (HPCL)	6.9	43.7	45.9	3.5	Nil
Personalised Vehicle Care (HPCL)	2.7	31.7	41.6	24.0	Nil
Personalised Customer Care (HPCL)	0.3	23.2	56.3	20.3	Nil
Innovation (BPCL)	2.7	21.9	53.6	20.3	Nil
Care (BPCL)	6.9	26.4	40.0	26.7	Nil
Reliable (BPCL)	6.7	36.0	45.1	12.3	Nil
Care (IOCL)	4.0	44.0	37.6	14.4	Nil
Innovation (IOCL)	4.0	19.2	51.5	21.9	3.5
Passion (IOCL)	4.0	18.9	43.5	21.9	11.7
Trust (IOCL)	6.7	47.5	28.8	12.8	4.3

In the crosstable of Income wise brand association of respondents with the brand values of HPCL, a higher percentage of respondents agree with the brand value of high quality of HPCL as compared to the agreement with the personalised vehicle care and personalised customer care. Also the respondents of the having income more than Rs. 1,00,000/- pm month exhibited a higher association with the high quality brand value of HPCL as compared to other income groups. 60.9% of the respondents in the income group of above Rs.1,00,000/- pm and 48.7% of the respondents having income

between Rs. 50,000/- pm to Rs. 1,00,000/- pm agreed with associating high quality brand value with HPCL (refer to table 7.58).

Table 7.58: Income-wise Brand Association with HPCL

Income wise Brand association with HPCL			
Agreement level with Brand Values	Above 1,00,000/- pm (%)	Between 50,000-1,00,000/- pm (%)	Less than 50,000/- pm (%)
Brand association with High Quality of HPCL			
Strongly Agree	6.9	9.3	4.3
Agree	60.9	48.7	27.5
Neither Agree Nor Disagree	32.2	42.0	58.5
Disagree	0	0	9.4
Strongly Disagree	Nil	Nil	Nil
Brand association with Personalised Vehicle Care of HPCL			
Strongly Agree	0	6.7	0
Agree	17.2	39.3	32.6
Neither Agree Nor Disagree	62.1	44.7	25.4
Disagree	20.7	9.3	42.0
Strongly Disagree	Nil	Nil	Nil
Brand Association with Personalised Customer Care of HPCL			
Strongly Agree	1.1	0	0
Agree	5.7	34.7	21.7
Neither Agree Nor Disagree	65.5	56.7	50.0
Disagree	27.6	8.7	28.3
Strongly Disagree	Nil	Nil	Nil

In case of BPCL the highest level of association with the brand value was with the Reliable brand value. The respondents belonging to the income group of Rs. 50,000/- to Rs. 1,00,000/- pm exhibited the highest agreement level with this brand value as compared to the respondents of other income levels (refer to table 7.59). Although close to 50% of the respondents neither agreed nor disagreed with any of the brand value surveyed in the research but still a higher percentage of the respondents disagreed with the brand value of Care of BPCL. 34.5% of the respondents having income above Rs. 1,00,000/- pm,

42.7% of the respondents having income between Rs. 50,000/-pm to Rs. 1,00,000/- pm and 29.7% of the respondents having income less than Rs. 50,000/- pm could associate with the reliable brand value of BPCL (refer to table 7.59).

Table 7.59: Income-wise Brand Association with BPCL

Income wise Brand association with BPCL			
Agreement Level with Brand Values	Above 1,00,000/- pm (%)	Between 50,000-1,00,000/- pm (%)	Less than 50,000/- pm (%)
Association of Innovation Brand Value with BPCL			
Strongly Agree	0	6.7	0
Agree	19.5	30.0	14.5
Neither Agree Nor Disagree	55.2	46.0	60.9
Disagree	25.3	17.3	24.6
Strongly Disagree	Nil	Nil	Nil
Association of Care Brand Value with BPCL			
Strongly Agree	9.2	12.0	0
Agree	21.8	24.0	31.9
Neither Agree Nor Disagree	33.3	50.0	33.3
Disagree	35.6	14.0	34.8
Strongly Disagree	Nil	Nil	Nil
Association of Reliable Brand Value with BPCL			
Strongly Agree	19.5	5.3	0
Agree	34.5	42.7	29.7
Neither Agree Nor Disagree	33.3	42.0	55.8
Disagree	12.6	10.0	14.5
Strongly Disagree	Nil	Nil	Nil

In case of IOCL a higher percentage of the respondents agreed with the Care and Trust Brand Values of the company. The highest association of the brand value of Care with IOCL (67.8% agreement) was exhibited by the respondents having income more than Rs. 1,00,000/- pm. The respondents could not strongly associate the brand values of Innovation and Passion with IOCL as

can be seen from the strong disagreement levels of the respondents with these brand values (refer to table 7.60)

Table 7.60: Income-wise Brand Association with IOCL

Income wise Brand association with IOCL			
Agreement Level with Brand Values	Above 1,00,000/- pm (%)	Between 50,000-1,00,000/- pm (%)	Less than 50,000/- pm (%)
Association of Care Brand Value with IOCL			
Strongly Agree	3.4	6.7	1.4
Agree	67.8	46.0	26.8
Neither Agree Nor Disagree	14.9	36.7	52.9
Disagree	13.8	10.7	18.8
Strongly Disagree	Nil	Nil	Nil
Association of Innovation Brand Value with IOCL			
Strongly Agree	3.4	6.7	1.4
Agree	23.0	23.3	12.3
Neither Agree Nor Disagree	50.6	56.0	47.1
Disagree	23.0	14.0	29.7
Strongly Disagree	Nil	9.4	3.5
Association of Passion Brand Value with IOCL			
Strongly Agree	3.4	6.7	1.4
Agree	29.9	14.7	16.7
Neither Agree Nor Disagree	25.3	59.3	37.7
Disagree	35.6	16.0	19.6
Strongly Disagree	5.7	3.3	24.6
Association of Trust Brand Value with IOCL			
Strongly Agree	14.9	6.7	1.4
Agree	42.5	43.3	55.1
Neither Agree Nor Disagree	16.1	36.7	28.3
Disagree	26.4	13.3	3.6
Strongly Disagree	Nil	Nil	11.6

Although the male respondents agreed more (48.8%) with the high quality brand value of HPCL, the female respondents exhibited a strong agreement with this brand value (14.3% strong agreement). The female respondents also

exhibited a higher agreement (46.4%) with the personalised vehicle care brand value of HPCL as can be seen in table 7.61.

Table 7.61: Gender-Wise Association with Brand Values of HPCL

Gender wise Association with Brand Values of HPCL		
Agreement Level with Brand Values	Male Response (%)	Female Response (%)
Association of High Quality Brand Value with HPCL		
Strongly Agree	1.0	14.3
Agree	48.8	37.5
Neither Agree Nor Disagree	50.2	40.5
Disagree	0	7.7
Strongly Disagree	Nil	Nil
Association of Personalised Vehicle Care Brand Value with HPCL		
Strongly Agree	4.8	0
Agree	19.8	46.4
Neither Agree Nor Disagree	50.7	30.4
Disagree	24.6	23.3
Strongly Disagree	Nil	Nil
Association of Personalised Customer Care Brand Value with HPCL		
Strongly Agree	.5	0
Agree	25.6	20.2
Neither Agree Nor Disagree	63.3	47.6
Disagree	10.6	32.1
Strongly Disagree	Nil	Nil

For BPCL, the highest association was with the care brand value (38.1% agreement) exhibited by the female respondents. The female respondents also associated with the reliable brand value of BPCL and 36.9% of the female respondents agreed with BPCL being perceived as a reliable company (refer to table 7.62). Both male and female respondents exhibited almost a similar level of agreement with the reliable brand value of BPCL. Moreover the male respondents exhibited a higher level of disagreement with the care brand value while the response of the females was just opposite who exhibited a higher level of agreement with the same brand value.

Table 7.62: Gender-wise Association with Brand Values of BPCL

Gender wise Association with Brand Values of BPCL		
Agreement level with Brand Values	Male Response (%)	Female Response (%)
Association of Innovation Brand Value with BPCL		
Strongly Agree	4.8	0
Agree	26.1	16.7
Neither Agree Nor Disagree	50.7	57.1
Disagree	18.4	26.2
Strongly Disagree	Nil	Nil
Association of Care Brand Value with BPCL		
Strongly Agree	12.6	0
Agree	16.9	38.1
Neither Agree Nor Disagree	37.2	43.5
Disagree	33.3	18.5
Strongly Disagree	Nil	Nil
Association of Reliable Brand Value with BPCL		
Strongly Agree	12.1	0
Agree	35.3	36.9
Neither Agree Nor Disagree	45.4	44.6
Disagree	7.2	18.5
Strongly Disagree	Nil	Nil

The male as well as female respondents exhibited a similar level of agreement for associating the brand value of Care with IOCL as can be seen from table 7.63. 44.4% of the male respondents and 43.5% of the female respondents exhibited their agreement for associating the brand value of Care with IOCL. The male respondents however exhibited a higher level of agreement (53.6% agreement) with the association of the brand value of Trust with IOCL while only 39.9% of the female respondents showed their agreement for associating the brand value of Trust with IOCL. The agreement level with the brand values of Innovation and Passion was not as high as that exhibited for the care and trust brand values. As can be seen from table 7.63, a higher percentage of both male (57.0%) as well as female respondents (44.6%) neither agreed nor disagreed with associating the brand value Innovation with IOCL. Similar was the case with the brand value of Passion where more than 40% of both male

and female respondents neither agreed nor disagreed with the association of this brand value with IOCL (see table 7.63).

Table 7.63: Gender-wise Association with Brand Values of IOCL

Gender wise Association with Brand Values of IOCL		
Agreement Level with Brand Values	Male Response (%)	Female Response (%)
Association of Care Brand Value with IOCL		
Strongly Agree	7.2	0
Agree	44.4	43.5
Neither Agree Nor Disagree	30.0	47.0
Disagree	18.4	9.5
Strongly Disagree	Nil	Nil
Association of Innovation Brand Value with IOCL		
Strongly Agree	7.2	0
Agree	11.1	29.2
Neither Agree Nor Disagree	57.0	44.6
Disagree	18.4	26.2
Strongly Disagree	6.3	0
Association of Passion Brand Value with IOCL		
Strongly Agree	7.2	0
Agree	15.5	23.2
Neither Agree Nor Disagree	44.0	42.9
Disagree	19.8	24.4
Strongly Disagree	13.5	9.5
Association of Trust Brand Value with IOCL		
Strongly Agree	12.1	0
Agree	53.6	39.9
Neither Agree Nor Disagree	17.4	42.9
Disagree	16.9	7.7
Strongly Disagree	Nil	9.5

The four wheeler owners exhibited a higher agreement (50.4%) with the high quality brand value of HPCL as compared to the responses given by the respondents having 2 wheelers where 33.3% of the respondents agreed associating the high quality brand value with HPCL. The respondents having a 4 wheeler also agreed more (36%) as compared to the respondents having a 2 wheeler (25.2%) to the brand values of personalised vehicle care and 26.3% of

the respondents having a four wheeler agreed with associating the brand value of personalised customer care with HPCL (see table 7.64).

Table 7.64: Association of Brand Values with HPCL based on Type of Vehicle Used

Association of Brand Values with HPCL based on Type of Vehicle Used		
Agreement Level with Brand Values	2 wheeler owners Response (%)	4 wheeler owners Response (%)
Association of High Quality Brand Value with HPCL		
Strongly Agree	4.8	8.3
Agree	33.3	50.4
Neither Agree Nor Disagree	53.1	41.2
Disagree	8.8	0
Strongly Disagree	Nil	Nil
Association of Personalised Vehicle Care Brand Value with HPCL		
Strongly Agree	0.7	3.9
Agree	25.2	36
Neither Agree Nor Disagree	37.4	44.3
Disagree	36.7	15.8
Strongly Disagree	Nil	Nil
Association of Personalised Customer Care Brand Value with HPCL		
Strongly Agree	0.7	0
Agree	18.4	26.3
Neither Agree Nor Disagree	53.1	58.3
Disagree	27.9	15.4
Strongly Disagree	Nil	Nil

As observed in table 7.65, almost a similar response was generated from the respondents having 2 wheelers and 4 wheelers for associating the brand value of Innovation with BPCL. A higher percentage of respondents from both the categories neither agreed nor disagreed with the brand value of Innovation of BPCL. The respondents having a two wheeler however exhibited a higher agreement level (38.1%) for associating the brand value of Care with BPCL. A similar response was obtained from both the categories of respondents while associating the brand value of Reliable for BPCL. 36.1% of the respondents

having a two wheeler and 36% of the respondents having a four wheeler exhibited their agreement for associating the brand value of reliable with BPCL (see table 7.65).

Table 7.65: Association of Brand Values with BPCL based on Type of Vehicle Used

Association of Brand Values with BPCL based on Type of Vehicle Used		
Agreement Level with Brand Values	2 wheeler owner Response (%)	4 wheeler owner Response (%)
Association of Innovation Brand Value with BPCL		
Strongly Agree	0.7	3.9
Agree	23.1	21.1
Neither Agree Nor Disagree	52.4	54.4
Disagree	23.8	20.6
Strongly Disagree	Nil	Nil
Association of Care Brand Value with BPCL		
Strongly Agree	2.0	10.1
Agree	38.1	18.9
Neither Agree Nor Disagree	34.7	43.4
Disagree	25.2	27.6
Strongly Disagree	Nil	Nil
Association of Reliable Brand Value with BPCL		
Strongly Agree	2.0	9.6
Agree	36.1	36.0
Neither Agree Nor Disagree	46.9	43.9
Disagree	15.0	10.5
Strongly Disagree	Nil	Nil

Table 7.66 depicts the agreement level of the respondents having different vehicle types with the brand values of IOCL. The respondents owning a 4 wheeler agreed more (50.4%) with the association of brand value of Care with IOCL. Both the categories of respondents exhibited a similar level of agreement for associating the brand value of Trust with IOCL. Again the brand values of Innovation and Passion did not receive high level of

agreement from the respondents as is the case with the Care and Trust brand values.

Table 7.66: Association of Brand Values with IOCL based on Type of Vehicle Used

Association of Brand Values with IOCL based on type of Vehicle Used		
Agreement Level with Brand Values	2 wheeler owners (%)	4 wheeler owners (%)
Association of Care Brand Value with IOCL		
Strongly Agree	2.0	5.3
Agree	34.0	50.4
Neither Agree Nor Disagree	43.5	33.8
Disagree	20.4	10.5
Strongly Disagree	Nil	Nil
Association of Innovation Brand Value with IOCL		
Strongly Agree	2.0	5.3
Agree	21.8	17.5
Neither Agree Nor Disagree	36.1	61.4
Disagree	31.3	15.8
Strongly Disagree	8.8	0
Association of Passion Brand Value with IOCL		
Strongly Agree	2.0	5.3
Agree	21.8	17.1
Neither Agree Nor Disagree	39.5	46.1
Disagree	16.3	25.4
Strongly Disagree	20.4	6.1
Association of Trust Brand Value with IOCL		
Strongly Agree	3.4	8.8
Agree	46.9	47.8
Neither Agree Nor Disagree	27.9	29.4
Disagree	10.9	14.0
Strongly Disagree	10.9	0

The housewives agreed more with associating the brand value of high quality with HPCL as can be seen in table 7.67. They also exhibited a higher level of agreement with associating the brand value of personalised vehicle care with HPCL. The respondents belonging to the service class however exhibited a

higher level of agreement for associating the brand value of personalised customer care with HPCL.

Table 7.67: Occupation-wise Brand Association with HPCL

Occupation wise Brand association with HPCL				
Agreement Level with Brand Values	Service (%)	Business (%)	Housewives (%)	Student (%)
Association of High Quality Brand Value with HPCL				
Strongly Agree	8.5	1.1	14.0	0
Agree	40.8	50.0	66.7	0
Neither Agree Nor Disagree	50.7	48.9	19.4	75
Disagree	0	0	0	25
Strongly Disagree	Nil	Nil	Nil	Nil
Association of Personalised Vehicle Care Brand Value with HPCL				
Strongly Agree	7.0	0	0	0
Agree	24.6	18.2	55.9	30.8
Neither Agree Nor Disagree	35.2	62.5	44.1	19.2
Disagree	33.1	19.3	0	50.0
Strongly Disagree	Nil	Nil	Nil	Nil
Association of Personalised Customer Care Brand Value with HPCL				
Strongly Agree	0	1.1	0	0
Agree	44.4	1.1	24.7	0
Neither Agree Nor Disagree	35.2	73.9	75.3	50.0
Disagree	20.4	23.9	0	50.0
Strongly Disagree	Nil	Nil	Nil	Nil

In case of BPCL, the respondents belonging to business class showed a higher level of agreement for associating the brand value of Innovation with IOCL. The housewives and the students exhibited a similar level of agreement for associating the care brand value with BPCL. In case of the reliable brand value, 58.0% of the respondents belonging to the business class agreed with the association of this brand value with BPCL. 44.1% of the housewives exhibited their agreement with associating the brand value of Care with BPCL and 30.1% of them agreed with associating the brand value of reliable with BPCL. 52.8% of the respondents belonging to the service class, 28.4% of the

respondents belonging to the business class, 63.4% of the housewives and 80.8% of the students neither agreed nor disagreed with associating the brand value of Innovation with BPCL (refer to table 7.68).

Table 7.68: Occupation-wise Brand Association with BPCL

Occupation wise Brand association with BPCL				
Agreement Level with Brand Values	Service (%)	Business (%)	Housewives (%)	Student (%)
Association of Innovation Brand Value with BPCL				
Strongly Agree	7.0	0	0	0
Agree	9.2	46.6	19.4	19.2
Neither Agree Nor Disagree	52.8	28.4	63.4	80.8
Disagree	31.0	25.0	17.2	0
Strongly Disagree	Nil	Nil	Nil	Nil
Association of Care Brand Value with BPCL				
Strongly Agree	7.0	18.2	0	0
Agree	15.5	14.8	44.1	44.2
Neither Agree Nor Disagree	43.0	45.5	38.7	25.0
Disagree	34.5	21.6	17.2	30.8
Strongly Disagree	Nil	Nil	Nil	Nil
Association of Reliable Brand Value with BPCL				
Strongly Agree	14.1	5.7	0	0
Agree	23.2	58.0	30.1	44.2
Neither Agree Nor Disagree	45.8	29.5	52.7	55.8
Disagree	16.9	6.8	17.2	0
Strongly Disagree	Nil	Nil	Nil	Nil

As seen from table 7.69 the respondents belonging to the business class exhibited the highest level of agreement with the association of brand value of Care with IOCL. The housewives exhibited higher agreement with associating Innovation brand value with IOCL, whereas the respondents belonging to the business class showed highest agreement for associating passion with IOCL. A

similar agreement level was obtained from the students and businessmen for their level of agreement with the association of brand value of trust with IOCL.

Table 7.69: Occupation-wise Brand Association with IOCL

Occupation wise Brand association with IOCL				
Agreement Level with Brand Values	Service (%)	Business (%)	Housewives (%)	Student (%)
Association of Care Brand Value with IOCL				
Strongly Agree	9.2	2.3	0	0
Agree	33.8	65.9	38.7	44.2
Neither Agree Nor Disagree	33.8	26.1	44.1	55.8
Disagree	23.2	5.7	17.2	0
Strongly Disagree	Nil	Nil	Nil	Nil
Association of Innovation Brand Value with IOCL				
Strongly Agree	9.2	2.3	0	0
Agree	7.7	26.1	40.9	0
Neither Agree Nor Disagree	43.0	61.4	41.9	75.0
Disagree	31.0	10.2	17.2	25.0
Strongly Disagree	9.2	0	0	0
Association of Passion Brand Value with IOCL				
Strongly Agree	9.2	2.3	0	0
Agree	7.7	36.4	30.1	0
Neither Agree Nor Disagree	43.0	48.9	38.7	44.2
Disagree	21.8	10.2	14.0	55.8
Strongly Disagree	18.3	2.3	17.2	0
Association of Trust Brand Value with IOCL				
Strongly Agree	9.2	13.6	0	0
Agree	29.6	75.0	33.3	75
Neither Agree Nor Disagree	40.8	4.5	35.5	25
Disagree	20.4	6.8	14.0	0
Strongly Disagree	Nil	Nil	17.2	0

The respondents in the age group of 59-68 years exhibited a higher agreement level (80% of respondents agreed) of associating the brand value of High Quality with HPCL. The respondents in the age group of 39-48 years showed a higher agreement with associating the brand value of Personalised vehicle care with HPCL. The respondents in the age group of 59-68 years also exhibited a higher agreement (66.7% of respondents agreed) for associating the brand value of Personalised customer care with HPCL (refer to table 7.70)

Table 7.70: Age-wise Brand Association with HPCL

Age wise Brand association with HPCL					
Agreement Level with Brand Values	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Association of High Quality Brand Value with HPCL					
Strongly Agree	1.0	7.0	0	15	6.7
Agree	15.2	59.7	51.2	15	80.0
Neither Agree Nor Disagree	71.4	33.3	48.8	10	13.3
Disagree	12.4	0	0	0	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil
Association of Personalised Vehicle Care Brand Value with HPCL					
Strongly Agree	0	0	1.2	0	60
Agree	19.0	41.1	44.2	15	13.3
Neither Agree Nor Disagree	46.7	37.2	30.2	72.5	26.7
Disagree	34.3	21.7	24.4	12.5	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil
Association of Personalised Customer Care Brand Value with HPCL					
Strongly Agree	0	0	0	2.5	0
Agree	6.7	22.5	45.3	5.0	66.7
Neither Agree Nor Disagree	61.9	58.1	43.0	72.5	33.3
Disagree	31.4	19.4	11.6	20.0	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil

As can be seen in table 7.71, a higher percentage of respondents in the age group of 18-28 years expressed their agreement for associating the brand values of innovation and care with BPCL. The respondents in the age group of

59-68 years expressed their agreement for associating the brand value of Reliable with BPCL.

Table 7.71: Age-wise Brand Association with BPCL

Age wise Brand association with BPCL					
Agreement Level with Brand Values	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Association of Innovation Brand Value with BPCL					
Strongly Agree	0	7.8	5.8	2.5	66.7
Agree	41.9	20.2	22.1	20.0	13.3
Neither Agree Nor Disagree	39.0	37.2	43.0	52.5	20.0
Disagree	19.0	34.9	29.1	25.0	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil
Association of Care Brand Value with BPCL					
Strongly Agree	0	7.8	5.8	2.5	66.7
Agree	41.9	20.2	22.1	20.0	13.3
Neither Agree Nor Disagree	39.0	37.2	43.0	52.5	20.0
Disagree	19.0	34.9	29.1	25.0	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil
Association of Reliable Brand Value with BPCL					
Strongly Agree	14.3	0	8.1	7.5	0
Agree	43.8	20.9	46.5	25.0	80.0
Neither Agree Nor Disagree	39.0	53.5	39.5	55.0	20.0
Disagree	2.9	25.6	5.8	12.5	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil

In case of IOCL the respondents in the age group of 39-48 years expressed their highest agreement (61.6% of the respondents agreed) for associating the brand value of Care with IOCL. This age group also exhibited a higher agreement for associating the brand value of Innovation (25.6% of the respondents), Passion (33.7% of the respondents) and Trust (62.8% of the respondents) with IOCL. 7.8% of the respondents in the age group of 29 to 38

years strongly agreed with associating the brand values of Care, Innovation, Passion and Trust with IOCL (refer to table 7.72).

Table 7.72: Age-wise Brand Association with IOCL

Age wise Brand association with IOCL					
Agreement Level with Brand Values	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Association of Care Brand Value with IOCL					
Strongly Agree	1.9	7.8	1.2	5.0	0
Agree	42.9	37.2	61.6	37.5	26.7
Neither Agree Nor Disagree	44.8	30.2	29.1	47.5	73.3
Disagree	10.5	24.8	8.1	10.0	0
Strongly Disagree	Nil	Nil	Nil	Nil	Nil
Association of Innovation Brand Value with IOCL					
Strongly Agree	1.9	7.8	1.2	5.0	0
Agree	23.8	10.9	25.6	20.0	20.0
Neither Agree Nor Disagree	47.6	43.4	60.5	57.5	80.0
Disagree	23.8	30.2	12.8	17.5	0
Strongly Disagree	2.9	7.8	Nil	Nil	Nil
Association of Passion Brand Value with IOCL					
Strongly Agree	1.9	7.8	1.2	5.0	0
Agree	17.1	11.6	33.7	20.0	6.7
Neither Agree Nor Disagree	34.3	48.8	48.8	20.0	93.3
Disagree	42.9	5.4	12.8	47.5	0
Strongly Disagree	3.8	26.4	3.5	7.5	0
Association of Trust Brand Value with IOCL					
Strongly Agree	5.7	7.8	7.0	7.5	0
Agree	61.9	34.1	62.8	32.5	13.3
Neither Agree Nor Disagree	17.1	39.5	20.9	20.0	86.7
Disagree	15.2	6.2	9.3	40.0	0
Strongly Disagree	Nil	12.4	Nil	Nil	0

In order to achieve a score for comparing the level of agreement for associating certain brand values with the OMCs a weightage of 2 was given to Strong agreement of the customer for associating the brand value with the OMC and a weightage of 1 was given to Agreement with these brand values.

The responses where the respondents neither agreed nor disagreed with associating the brand value with the company were given a weightage of 0 and a weightage of -1 was given to the responses where the respondent expressed his disagreement for associating a particular brand value with the company. Table 7.73, 7.74 and 7.75 give the weighted average score of the respondents for their agreement in associating certain brand values with HPCL, BPCL and IOCL respectively.

Table 7.73: Weighted Average Score for Association of Brand Values with HPCL

Agreement with Brand Values	High Quality (HPCL)	Personalised vehicle care (HPCL)	Personalised customer care (HPCL)
Strongly Agree	6.90%	2.70%	0.30%
Weightage	2	2	2
Score	0.138	0.054	0.006
Agree	43.70%	31.70%	23.20%
Weightage	1	1	1
Score	0.437	0.317	0.232
Neither Agree Nor Disagree	45.90%	41.60%	56.30%
Weightage	0	0	0
Score	0	0	0
Disagree	3.50%	24%	20.30%
Weightage	-1	-1	-1
Score	-0.035	-0.24	-0.203
Total Score	0.54	0.131	0.035
Total Weighted Average Score		0.235	

The weighted average score for association with the brand values is 0.235 for HPCL (refer to table 7.73), 0.187 for BPCL (refer to table 7.74) and 0.191 for IOCL (refer to table 7.75).

Table 7.74: Weighted Average Score for Association of Brand Values with BPCL

Agreement with Brand Values	Innovation (BPCL)	Care (BPCL)	Reliable (BPCL)
Strongly Agree	2.70%	6.90%	6.70%
Weightage	2	2	2
Score	0.054	0.138	0.134
Agree	21.90%	26.40%	36.00%
Weightage	1	1	1
Score	0.219	0.264	0.36
Neither Agree Nor Disagree	53.60%	40.00%	45.10%
Weightage	0	0	0
Score	0	0	0
Disagree	21.90%	27%	12.30%
Weightage	-1	-1	-1
Score	-0.219	-0.267	-0.123
Total Score	0.054	0.135	0.371
Total Wt. Average Score	0.187		

Table 7.75: Weighted Average Score for Association of Brand Values with IOCL

Agreement with Brand Values	Care (IOCL)	Innovation (IOCL)	Passion (IOCL)	Trust (IOCL)
Strongly Agree	4.00%	4.00%	4.00%	6.70%
Weightage	2	2	2	2
Score	0.08	0.08	0.08	0.134
Agree	44.00%	19.20%	18.90%	47.50%
Weightage	1	1	1	1
Score	0.44	0.192	0.189	0.475
Neither Agree Nor Disagree	37.60%	51.50%	43.50%	28.80%
Weightage	0	0	0	0
Score	0	0	0	0
Disagree	14.40%	25%	33.60%	17.10%
Weightage	-1	-1	-1	-1
Score	-0.144	-0.254	-0.336	-0.171
Total Score	0.376	0.018	-0.067	0.438
Total Wt. Average Score	0.191			

Thus from the brand association scores it is inferred that HPCL enjoyed a higher agreement level of the respondents for associating the brand values of high quality personalised vehicle and customer care with the company. IOCL occupied a second position in the brand association scores followed by HPCL.

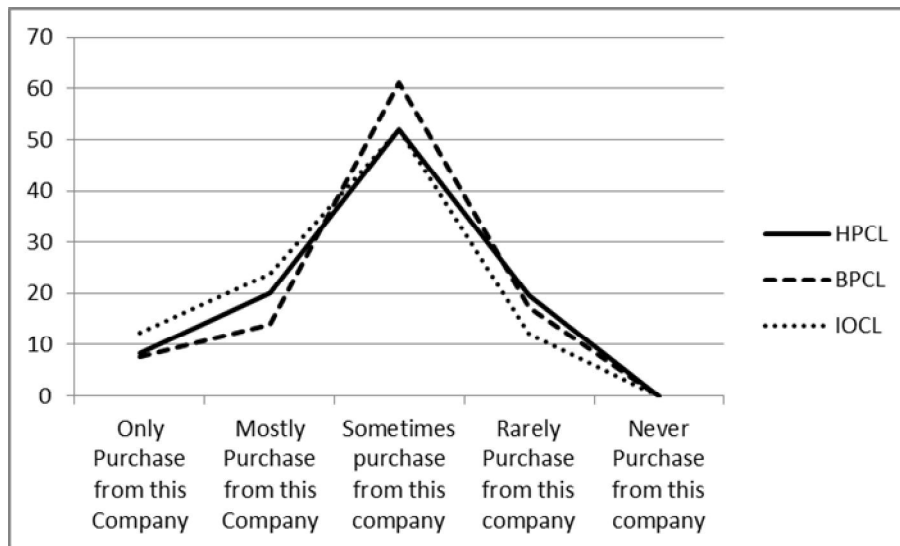
7.5 Brand Loyalty Exhibited for the Public Sector Oil Marketing Companies

In order to study the brand loyalty exhibited by the customers, the respondents were required to respond about their purchase behaviour of auto fuel. The 5 point Likert scale was constructed to collect responses about the frequency of purchase of auto fuel from a particular oil marketing company. The scale ranged from “Only purchase from this company” to “never purchase from this company”.

From table 7.76 and the exhibit 7.2 it can be clearly seen that the consumers of the oil marketing companies exhibit a higher loyalty for IOCL as compared to other two public sector oil marketing companies. The peak of the graph in the centre corresponding to the customer response of visiting all the petrol station sometimes has a clear indication of the indifferent purchase behaviour of the customers and one can say that there is no significant difference in the level of customer brand loyalty for the oil marketing companies. However the purchase behaviour exhibited in table 7.76 shows that IOCL is leading in the brand loyalty scores exhibited by the customers. Hence the null hypothesis of hypothesis 4 which states that there is no significant difference in the level of customer brand loyalty for the public sector oil marketing companies gets rejected.

Table 7.76: Loyalty Exhibited Towards OMCs

Company Name	Only Purchase from this Company (%)	Mostly Purchase from this Company (%)	Sometimes purchase from this company (%)	Rarely Purchase from this company (%)	Never Purchase from this company (%)
HPCL	8.3%	20.0%	52.0%	19.7%	0%
BPCL	7.7%	13.9%	61.1%	17.3%	0%
IOCL	12.3%	23.7%	52.0%	12.0%	0%

**Exhibit 7.2: Loyalty Exhibited Towards OMCs**

(where X-axis represents the purchase behaviour and Y-axis represents the percentage of responses received for the oil marketing companies)

ANOVA test was further conducted to study if purchase of the fuel from the retail outlet of a particular oil marketing company varied significantly amongst customers belonging to different income groups.

Table 7.77 shows a significance level of ANOVA test of 0.037 for HPCL, 0.031 for BPCL and 0.009 for IOCL and all these significance values are less than 0.05. Hence the null hypothesis of hypothesis 4 gets rejected and it can be

concluded that there is significant difference in the level of customer brand loyalty for the oil marketing companies across different income levels.

Table 7.77: Analysis of Variance for Brand Loyalty Exhibited for OMCs

ANOVA						
		Sum of Squares	df	Mean Square	F	Sig.
Purchase from HPCL	Between Groups	4.609	2	2.304	3.325	.037
	Within Groups	257.807	372	.693		
	Total	262.416	374			
Purchase from BPCL	Between Groups	4.214	2	2.107	3.509	.031
	Within Groups	223.386	372	.600		
	Total	227.600	374			
Purchase from IOCL	Between Groups	6.669	2	3.335	4.734	.009
	Within Groups	262.008	372	.704		
	Total	268.677	374			

In order to identify where this difference lies, Post_Hoc test is carried out. For the analysis through SPSS the various income levels were coded as “1”- Income above Rs. 1,00,000/-pm ; “2” – Income between 50,000/-pm to 1,00,000/- pm and “3” -Income below 50,000/- pm . The purchase pattern on 5 point Likert scale was coded as “1”- Only purchase from this company; “2”- Mostly purchase from this company, “3”- Sometimes purchase from this company; “4”- Rarely Purchase from this company and “5” –Never purchase from this company.

From the three tables (table 7.78, 7.79 and 7.80) obtained after conducting the Post-Hoc test to identify the difference in the loyalty expressed by the customers for the oil marketing companies it is observed that though two

subsets have been formed exhibiting difference in the purchase behaviour by customers belonging to different income groups but this difference is not very large.

Table 7.78: Income-wise Difference in Loyalty for HPCL

Purchase from HPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Less than 50 000 pm	138	2.73	
Between 50 000-100 000 pm	150	2.81	2.81
Above 100 000 pm	87		3.02
Sig.		.733	.130

Table 7.79: Income-wise Difference in Loyalty for BPCL

Purchase from BPCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Above 100 000 pm	87	2.74	
Between 50 000-100 000 pm	150	2.85	2.85
Less than 50 000 pm	138		3.01
Sig.		.514	.250

Table 7.80: Income-wise Difference in Loyalty for IOCL

Purchase from IOCL			
Tukey Homogeneous Subsets Displayed			
Income Interval	N	Subset for alpha = 0.05	
		1	2
Less than 50 000 pm	138	2.46	
Above 100 000 pm	87	2.71	2.71
Between 50 000-100 000 pm	150		2.75
Sig.		.060	.926

Almost all the scores can be rounded off to 3 showing that the customers sometimes visit the petrol station of one oil marketing company and sometimes that of the other company. Also since there is not differential pricing strategy followed by any of the PSU oil marketing company so the consumers also cannot be categorised as Pseudo loyals who switch their brand loyalty under the influence of price cuts or discounts.

Hence although the post hoc test results do not show very large difference in the scores of the subsets formed but they definitely point towards the fact that there is a significant difference in the level of brand loyalty exhibited by customers of different income levels. As seen in table 7.81, almost a similar percentage of respondents in the income brackets of less than Rs. 50,000/- pm and between Rs.50,000/- to Rs. 1,00,000/- pm mostly purchase petrol from HPCL.

Table 7.81: Income wise Brand Loyalty Exhibited for OMCs

Income wise Percentage of Responses			
Purchase Behaviour	Above 1,00,000/- pm (%)	Between 50,000- 1,00,000/- pm (%)	Less than 50,000/- pm (%)
Loyalty exhibited for HPCL			
Only purchase	2.3	9.3	10.9
Mostly purchase	14.9	22.0	21.0
Sometimes purchase	60.9	46.7	52.2
Rarely Purchase	21.8	22.0	15.9
Never Purchase	Nil	Nil	Nil
Loyalty exhibited for BPCL			
Only purchase	9.2	8.7	5.8
Mostly purchase	23.0	12.0	10.1
Sometimes purchase	52.9	65.3	61.6
Rarely Purchase	14.9	14.0	22.5
Never Purchase	Nil	Nil	Nil
Loyalty exhibited for IOCL			
Only purchase	5.7	10.7	18.1
Mostly purchase	27.6	18.7	26.8
Sometimes purchase	56.3	55.3	45.7
Rarely Purchase	10.3	15.3	9.4
Never Purchase	Nil	Nil	Nil

A higher percentage of respondents having income above Rs.1,00,000/- pm exhibit loyalty for BPCL by purchasing petrol mostly from this company. The respondents having income above Rs. 1,00,000/-pm and less than Rs. 50,000/-pm exhibited a similar agreement level for purchasing mostly from IOCL. Similar tables have been made to depict the loyalty expressed by the respondents based on their demographic variables towards these oil marketing companies.

As seen from table 7.82, the female respondents exhibited a stronger loyalty for the oil companies as compared to the male respondents.

Table 7.82: Gender-wise Brand Loyalty Exhibited for OMCs

Purchase Behaviour	Male Response (%)	Female Response (%)
Loyalty Exhibited for HPCL		
Only purchase	6.3	10.7
Mostly purchase	17.4	23.2
Sometimes purchase	53.1	50.6
Rarely Purchase	23.2	15.5
Never Purchase	Nil	Nil
Loyalty Exhibited for BPCL		
Only purchase	8.2	7.1
Mostly purchase	12.1	16.1
Sometimes purchase	60.4	61.9
Rarely Purchase	19.3	14.9
Never Purchase	Nil	Nil
Loyalty Exhibited for IOCL		
Only purchase	11.1	13.7
Mostly purchase	27.5	19.0
Sometimes purchase	53.1	50.6
Rarely Purchase	8.2	16.7
Never Purchase	Nil	Nil

The respondents having 2 wheelers exhibited a higher loyalty for HPCL as compared to the respondents having 4 wheelers who exhibited a higher loyalty for BPCL. IOCL enjoyed equal level of loyalty from both the categories of

respondents which is expressed by their purchase from this company (refer to table 7.83).

Table 7.83: Brand Loyalty Exhibited Based on Type of Vehicle Used

Purchase Behaviour	2 wheeler owner Response (%)	4 wheeler owner Response (%)
Loyalty Exhibited for HPCL		
Only purchase	9.5	7.5
Mostly purchase	26.5	15.8
Sometimes purchase	48.3	54.4
Rarely Purchase	15.6	22.4
Never Purchase	Nil	Nil
Loyalty Exhibited for BPCL		
Only purchase	8.8	7.0
Mostly purchase	12.2	14.9
Sometimes purchase	61.2	61.0
Rarely Purchase	17.7	17.1
Never Purchase	Nil	Nil
Loyalty Exhibited for IOCL		
Only purchase	15.0	10.5
Mostly purchase	23.1	24.1
Sometimes purchase	52.4	51.8
Rarely Purchase	9.5	13.6
Never Purchase	Nil	Nil

In case of loyalty exhibited based on the occupation of the respondents, it is clear from table 7.84 that the respondents belonging to service class and business class respondents expressed similar level of purchase behaviour for BPCL. The housewives expressed higher loyalty for HPCL with 30.1% of the housewives claiming that they mostly purchased petrol from HPCL outlets. 36.4% of the respondents belonging to business class expressed a higher loyalty for IOCL as they claimed to mostly purchase petrol for their vehicles from IOCL retail outlets. The respondents belonging to the service class also exhibited higher loyalty towards IOCL outlets as 21.1% of the respondents claimed to mostly purchase petrol from IOCL outlets. Students also exhibited

a higher loyalty for IOCL petrol pumps as 28.8% of the students claimed that they mostly purchased petrol from IOCL outlets (refer to table 7.84).

Table 7.84: Occupation-wise Brand Loyalty Exhibited for OMCs

Occupation wise Percentage of Responses for Loyalty Exhibited by Respondents				
Purchase Behaviour	Service (%)	Business (%)	Housewives (%)	Student (%)
Loyalty exhibited for HPCL				
Only purchase	9.2	0	16.1	5.8
Mostly purchase	17.6	12.5	30.1	21.2
Sometimes purchase	51.4	65.9	43.0	46.2
Rarely Purchase	21.8	21.6	10.8	26.9
Never Purchase	Nil	Nil	Nil	Nil
Loyalty exhibited for BPCL				
Only purchase	4.2	12.5	7.5	9.6
Mostly purchase	15.5	15.9	9.7	13.5
Sometimes purchase	65.5	50.0	64.5	61.5
Rarely Purchase	14.8	21.6	18.3	15.4
Never Purchase	Nil	Nil	Nil	Nil
Loyalty exhibited for IOCL				
Only purchase	12.7	10.2	14.0	11.5
Mostly purchase	21.1	36.4	12.9	28.8
Sometimes purchase	54.9	44.3	58.1	46.2
Rarely Purchase	11.3	9.1	15.1	13.5
Never Purchase	Nil	Nil	Nil	Nil

Table 7.85 points out that the respondents in the age group of 39-48 years were more loyal towards HPCL whereas the respondents in the age group of 18-28 years expressed higher loyalty towards BPCL and IOCL through their purchase behaviour.

Table 7.85: Age-wise Brand Loyalty Exhibited for OMCs

Age wise Percentage of Responses for Loyalty Exhibited by Respondents					
Purchase Behaviour	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Loyalty Exhibited for HPCL					
Only purchase	5.7	8.5	10.5	10.0	6.7
Mostly purchase	21.9	17.8	22.1	20.0	13.3
Sometimes purchase	43.8	61.2	54.7	55.0	6.7
Rarely Purchase	28.6	12.4	12.8	15.0	73.3
Never Purchase	Nil	Nil	Nil	Nil	Nil
Loyalty Exhibited for BPCL					
Only purchase	13.3	4.7	8.1	5.0	0
Mostly purchase	20.0	10.1	12.8	17.5	0
Sometimes purchase	50.5	66.7	61.6	57.5	93.3
Rarely Purchase	16.2	18.6	17.4	20.0	6.7
Never Purchase	Nil	Nil	Nil	Nil	Nil
Loyalty Exhibited for IOCL					
Only purchase	10.5	17.1	10.5	2.5	20.0
Mostly purchase	29.5	22.5	19.8	25.0	13.3
Sometimes purchase	48.6	51.2	53.5	57.5	60.0
Rarely Purchase	11.4	9.3	16.3	15.0	6.7
Never Purchase	Nil	Nil	Nil	Nil	Nil

In order to achieve a score for comparing the loyalty exhibited by the respondents towards the OMCs through their purchase behaviour a weightage of 4 was given to responses for “Only purchase from this Company”; a weightage of 3 was given to responses for “Mostly Purchase from this Company”; weightage of 2 was given to responses for “Sometimes purchase from this company” and finally a weightage of 1 was given to responses for “Rarely Purchase from this company”. The weighted loyalty scores of 2.169 for HPCL, 2.121 for BPCL and 2.372 for IOCL as calculated in Table 7.86 clearly indicate that IOCL enjoys a higher loyalty of the respondents as compared to the other two companies.

Table 7.86: Weighted Loyalty Scores for the OMCs

Purchase Behaviour	HPCL	BPCL	IOCL
Only Purchase	8.30%	7.70%	12.30%
Weightage	4	4	4
Score	0.332	0.308	0.492
Mostly Purchase	20%	14%	24%
Weightage	3	3	3
Score	0.6	0.42	0.72
Sometimes purchase	52%	61%	52%
Weightage	2	2	2
Score	1.04	1.22	1.04
Rarely purchase	19.70%	17.30%	12%
Weightage	1	1	1
Score	0.197	0.173	0.12
Total Score	2.169	2.121	2.372

Though there is a very small difference in the weighted loyalty scores for the OMCs which is supported by the purchase behaviour observed of the customer who normally visits a petrol pump enroute to his home or work place, still from the responses gathered from the research it is concluded that IOCL enjoys a higher brand loyalty of the respondents followed by BPCL and lastly HPCL.

SUMMARY

It can be concluded from data analysis that there exists a significant difference in the level of brand awareness, perceived brand quality, brand association and brand loyalty expressed by the customers for the public sector oil marketing companies. HPCL enjoyed the highest awareness of its tag lines and promotional campaigns but received the least awareness for its branded petrol and convenience stores. IOCL had the highest awareness for its loyalty cards but least awareness for its tag lines. BPCL had the highest awareness for its branded petrol and convenience stores but low awareness for its loyalty cards

and promotional campaigns. The customers perceive the quality of petrol marketed by HPCL to be of better quality than that marketed by BPCL and IOCL. HPCL enjoyed the highest agreement level of the customers for associating the brand values of high quality personalised vehicle care and personalised customer care with the company. IOCL enjoyed the second position in the brand association scores where customers associated the brand values of Care and Trust with the company as compared to the brand value of Innovation and Passion. Last in the list was BPCL where the customers agreed associating the brand values of Care and Reliable with the company and could not associate the brand value of Innovation with the company to the same extent. The weighted loyalty scores indicate that IOCL enjoys a higher loyalty of the respondents as compared to the other two companies. The overall scores of customer based brand equity has HPCL ranked higher in brand awareness, brand quality and brand association while IOCL is ranked number one in brand loyalty. This high ranking of HPCL on brand awareness, brand association and perceived brand quality is despite the fact that there are higher number of IOCL retail outlets in the city as compared to both HPCL and BPCL retail outlets put together. The following chapter is the concluding part of the thesis where the researcher has recommended some measures which the oil marketing companies can deploy to improve their customer based brand equity.

CHAPTER-8

CONCLUSION & RECOMMENDATIONS

Contents	Page No.
8.1 Conclusion	197
8.2 Recommendation	216
8.3 Limitation of the Research	226
8.4 Scope for Future Research	226

CHAPTER 8

CONCLUSION AND RECOMMENDATIONS

After undergoing an immense and in-depth study of the literature and conducting the research work to study customer based brand equity for the public sector oil marketing companies, the researcher has drawn the conclusions highlighted in this chapter. The researcher hopes that the recommendations made on the basis of the findings of the research work could be implemented by the oil marketing companies for their benefit.

8.1 CONCLUSION

This thesis has been focused on understanding the customer based brand equity for the public sector oil marketing companies. For studying the same the researcher studied the brand awareness, brand association, perceived quality and loyalty expressed by the consumers for these companies. There is a lot of work done by each public sector oil marketing company in India with the objective of creating brand differentiation in the minds of the consumer. For brand differentiation the Indian OMCs adopted the concept of forecourt retailing, started promoting premium fuel with additives under different brand names and employed brand ambassadors for communicating the brand propositions (Attri, Pahwa & Urkude 2011a). BPCL and HPCL also started sponsoring car racing events while BPCL and IOCL used internet as a medium to run contests and advertise about their high end fuels. The brand building activities are however no match to those of the international oil marketing companies who manage multiple brands of high end fuel, elaborate forecourt retailing and have had a very customer focused approach to building loyalty

for their brands. Their above the line marketing communication activities are very customer centric and their advertisements communicate about how the customer will benefit from it (Attri & Pahwa, 2012). A research conducted by Marketing and Development Research Associates (MDRA) in 2003, to study the consumer preference and perception of branded fuels reported that a little over 43 per cent of those polled use branded fuel; just 14 per cent did not know about branded fuel. Significantly, 26 per cent of vehicle owners knew about branded fuel but had not tried it. BPCL's Speed, at 67% of the users, was the winner by a long margin. Indian Oil Corporation's Premium found fewer takers (39%), in spite of a larger network and more retail outlets in Delhi and Mumbai. The user figures for Power (HPCL) and Josh (IBP) were also similar: 31% and 25%, respectively. Over 16% of the vehicle owners polled had tried the new, improved petrol, but later stopped. The most frequently cited reason for reverting to regular petrol was the price: close to 32% felt branded fuels were too expensive; not perceiving any difference between branded and regular petrol (15%); lack of availability (15%); and poor fuel average (19%); were among the other reasons for discontinuing branded petrol. Mileage was the key trigger for all users of branded petrol. 96% of the interviewees looked forward to greater mileage from branded petrol, followed by 80% who expected enhanced engine performance, and hence smoother ride. A research paper by P. Kumar and A. Sahay titled "Retailing At Petrol Pumps : From Commodity Dispensing to Customer Service" published in Journal of service research in 2004 concluded based on the research conducted in Delhi, that service concept at petrol stations was practically absent.

The results of the primary research point towards the following:

- 8.1.1 Each of the public sector oil marketing company received an equal recall percentage by the respondents in the unaided brand recall of the company which markets petrol. In the unaided brand recall of a company selling petrol/diesel 34.7% of the respondents answered HPCL, 31.2% of the respondents recalled BPCL and the same percentage was there for IOCL. This weak positioning in the minds of

the consumers has resulted in Brand Dilution where the customers respond by saying that **“All the Companies are just the same”**. However when analysis of variance test was conducted to identify where the difference existed in brand awareness for the oil marketing companies by the customers, it was observed that BPCL enjoyed a higher position in the minds of the customers of middle and higher income group whereas IOCL enjoyed a higher position amongst the customers belonging to lower income group.

- 8.1.2 The tag line of “Club HP” received the highest correct responses of 58.7% followed by 18.9% correct responses for “Speed” petrol with the tag line of “High Performance Petrol”. For the rest of the tag lines the awareness exhibited by the respondents was very low.
- 8.1.3 40.3% of the respondents could correctly associate the branded petrol – Speed from BPCL followed by 34.1% correct responses for Xtrapremium from IOCL and 25.1% correct responses for Power from HPCL.
- 8.1.4 The awareness level of the customers was very low for the convenience stores of the oil marketing companies. The highest recall was of the In & Out convenience store of BPCL with 35.2% correct responses. The other two convenience stores of HPCL and IOCL received a low awareness amongst the customers. The convenience store “Care” from IOCL received just 10.1% correct responses and “Speedmart” from HPCL had the lowest awareness of 6.9% correct responses from the customers.
- 8.1.5 The aided recall of the promotional campaigns run by these companies was also very low with less than 20% of the customers giving correct responses. Amongst the aided recall of promotional campaigns for which awareness level of the respondents was studied, the “Bhar Bhar Ke Jeeto” campaign of HPCL was recalled the most and it received 17.1% correct responses. More than 62% of the customers had never heard of these promotional campaigns (Attri, Pahwa, Urkude, 2011b).

- 8.1.6 Each of the Public Sector Oil Marketing Company has been promoting their loyalty cards to the customers to encourage repeat purchase of fuel from the company outlet and thereby increase their loyalty. The aided brand recall of the parent company based on the name of the loyalty card also depicted a poor brand awareness of these cards by the respondents. The highest recall was of “Xtrarewards” loyalty card from IOCL. More than 69% of the customers exhibited a very weak brand recall of the loyalty cards offered by these companies. About 26.7% of the respondents believed that “Petrocard” was issued by IOCL instead of BPCL. Such weak brand awareness of the line and brand extensions of the oil marketing by the respondents points towards the fact that these companies need to find out more ways to increase their brand awareness.
- 8.1.7 An overview of Income wise highest awareness level amongst the respondents as depicted in table 8.1 points towards the highest awareness by the respondents earning between Rs. 50,000/- pm to Rs. 1,00,000/- pm amongst all the income groups for the tag lines, loyalty cards, promotional campaigns and the line and brand extensions of oil marketing companies. None of the respondents were aware of the tag line “Go Out and Play” of IOCL and “Achcha Lagta Hai” of HPCL. Moreover it was surprising that most of the respondents associated “achcha Lagta Hai” tag line of HPCL with the blood donation tag line “Kar Ke Dekhiye- Achcha Lagta Hai” which were being aired in the television. Of the three oil marketing companies IOCL enjoyed higher awareness level amongst the respondents belonging to the income bracket of Rs. 50,000/- to Rs. 1,00,000/- pm. The respondents earning less than Rs. 50,000/- pm followed the above income level in their awareness level.

Table 8.1: Income-wise Highest Awareness Level of Respondents

Highest Awareness based on Income of Respondents				
Awareness Dimensions	Company	Income above Rs. 1,00,000/- pm	Income between Rs. 50,000/- to Rs. 1,00,000/- pm	Income less than Rs. 50,000/- pm
Bringing Energy to Life	IOCL		√	
Club HP	HPCL		√	
Pure For Sure	BPCL		√	
Achcha Lagta Hai	HPCL	Nil	Nil	Nil
Go Out & Play	IOCL	Nil	Nil	Nil
Pure Bhi Poora Bhi	IOCL		√	
High Performance Petrol	BPCL			√
Speed	BPCL		√	
Power	HPCL		√	√
Xtrapremium	IOCL		√	
In & Out	BPCL		√	
Care	IOCL			√
Speedmart	HPCL			√
Bhar Bhar Ke Jeeto	HPCL			√
Bharo Petrol Chalo London	BPCL	√		
Saal Bhar Free Fuel	IOCL			√
Petrocard	BPCL			√
i-mint card	HPCL		√	
Xtrarewards	IOCL		√	

8.1.8 There was an overall higher percentage of correct responses given by the respondents having a four wheeler for all the tag lines in the questionnaire except for the “High Performance” tag line of BPCL which received higher percentage of correct responses from those owning a two wheeler. The respondents owning 4 wheeler exhibited a higher awareness level of the marketing communications, promotional campaigns, loyalty cards etc. as compared to those having two wheelers as can be seen from table 8.2. The awareness of Xtrapremium brand of petrol from IOCL was higher amongst the two wheeler owners. There was almost an equal awareness of “Speed” petrol brand from BPCL amongst both the categories of respondents. The

respondents having 2 wheelers were more aware of the brand name of promotional campaigns as well as the convenience stores of IOCL. On the other hand the convenience stores and promotional campaigns of BPCL and HPCL had a high awareness amongst the respondents having a 4 wheeler. The “Xtrarewards” loyalty cards issued by IOCL were recalled more by the 4 wheeler owners than by the 2 wheeler owners.

Table 8.2: Highest Awareness Based on Vehicle Used by Respondents

Highest Awareness Based on Vehicle Owned by Respondents			
Awareness Dimensions	Company	Respondents Having 2 Wheeler	Respondents Having 4 wheeler
Bringing Energy to Life	IOCL		√
Club-----	HPCL		√
Pure For Sure	BPCL		√
Achcha Lagta Hai	HPCL	Nil	Nil
Go Out & Play	IOCL	Nil	Nil
Pure Bhi Poora Bhi	IOCL		√
High Performance Petrol	BPCL	√	
Speed	BPCL	√	√
Power	HPCL		√
Xtrapremium	IOCL	√	
In & Out	BPCL		√
Care	IOCL	√	
Speedmart	HPCL		√
Bhar Bhar Ke Jeeto	HPCL	√	
Bharo Petrol Chal London	BPCL		√
Saal Bhar Free Fuel	IOCL	√	
Petrocard	BPCL		√
i-mint card	HPCL	√	
Xtrarewards	IOCL		√

8.1.9 The student community exhibited the highest awareness (44.2% correct responses) for “Pure for Sure” tag line of BPCL and “Pure Bhi

Poora Bhi” tag line of BPCL (80.8% correct responses), while the housewives remembered “Club HP” tag line exhibiting 100% recall for this tag line. The student respondents exhibited an overall higher awareness for the loyalty cards, tag lines, promotional campaign etc. as can be seen from table 8.3. The respondents belonging to the service class did not exhibit high awareness. The housewives exhibited higher awareness for branded fuel from IOCL. The business class was more aware of the branded fuel as well as the promotional campaign of “Bharo Petrol Chalo London” of BPCL.

Table 8.3: Occupation-wise Highest Awareness Level of Respondents

Highest Awareness Based on Occupation of Respondents					
Awareness Dimensions	Company	Service	Business	Housewife	Student
Bringing Energy to Life	IOCL		√		
Club-----	HPCL		√		
Pure For Sure	BPCL				√
Achcha Lagta Hai	HPCL	Nil	Nil	Nil	Nil
Go Out & Play	IOCL	Nil	Nil	Nil	Nil
Pure Bhi Poora Bhi	IOCL				√
High Performance Petrol	BPCL				√
Speed	BPCL		√		
Power	HPCL				√
Xtrapremium	IOCL			√	
In & Out	BPCL			√	
Care	IOCL				√
Speedmart	HPCL				√
Bhar Bhar Ke Jeeto	HPCL			√	
Bharo Petrol Chalo London	BPCL		√		
Saal Bhar Free Fuel	IOCL				√
Petrocard	BPCL				√
i-mint card	HPCL			√	
Xtrarewards	IOCL				√

8.1.10 Overall the female respondents had a higher awareness of the premium fuels as well as the tag lines of the companies as compared to the male

respondents. The female respondents also exhibited higher awareness of the loyalty cards from HPCL and IOCL whereas the male respondents gave higher percentage of correct responses for the loyalty cards offered by BPCL. The male respondents however were more aware of the convenience stores of IOCL and HPCL. The male respondents also exhibited a higher awareness level for the promotional campaigns of BPCL and IOCL (refer to table 8.4). In all other awareness dimensions of the oil marketing companies the females outscored the male respondents (Attri, Pahwa & Urkude, 2011c).

Table 8.4: Gender- wise Highest Awareness Level of Respondents

Highest Awareness Based on Gender of Respondents			
Awareness Dimensions	Company	Male Respondents	Female Respondents
Bringing Energy to Life	IOCL		√
Club HP	HPCL		√
Pure For Sure	BPCL		√
Achcha Lagta Hai	HPCL	Nil	Nil
Go Out & Play	IOCL	Nil	Nil
Pure Bhi Poora Bhi	IOCL		√
High Performance Petrol	BPCL		√
Speed	BPCL		√
Power	HPCL		√
Xtrapremium	IOCL		√
In & Out	BPCL		√
Care	IOCL	√	
Speedmart	HPCL	√	
Bhar Bhar Ke Jeeto	HPCL		√
Bharo Petrol Chalo London	BPCL	√	
Saal Bhar Free Fuel	IOCL	√	
Petrocard	BPCL	√	
i-mint card	HPCL		√
Xtrarewards	IOCL		√

8.1.11 The respondents belonging to the age group of 18-28 years exhibited higher awareness for the tag lines of the oil marketing companies as compared to other age groups. The respondents in the age group of 29-38 years showed higher awareness for the branded fuel of BPCL and IOCL than HPCL (refer table 8.5). The respondents in the age group of 18-28 years showed higher awareness for the convenience stores of IOCL and HPCL whereas the respondents in the age group of 49-58 years exhibited higher awareness for the convenience store of BPCL.

Table 8.5: Age-wise Highest Awareness Level of Respondents

Highest Awareness Based on Age of Respondents					
Awareness Dimensions	18-28 (%)	29-38 (%)	39-48 (%)	49-58 (%)	59-68 (%)
Bringing Energy to Life (IOCL)				√	
Club----- (HPCL)			√		
Pure for Sure (BPCL)	√				
Achcha Lagta Hai (HPCL)	Nil	Nil	Nil	Nil	Nil
Go Out and Play (IOCL)	Nil	Nil	Nil	Nil	Nil
Pure Bhi Poora Bhi (IOCL)	√				
High Performance Petrol (BPCL)	√				
Speed (BPCL)		√			
Power (HPCL)	√				
Xtrapremium (IOCL)		√			
In & Out Store (BPCL)				√	
Care (IOCL)	√				
Speedmart (HPCL)	√				
Bhar Bhar Ke Jeeto (HPCL)				√	
Bharo Petrol Chalo London (BPCL)			√		
Saal Bhar Free Fuel (IOCL)	√				
Petrocard (BPCL)	√				
i-mint card (HPCL)					√
Xtrarewards card (IOCL)	√				

8.1.12 The respondents did not exhibit any significant difference in their perceived quality for the oil marketing companies. According to the qualitative responses each company markets almost the same quality fuel and a differentiation in quality of fuel offered by these companies is not present amongst the consumers. As can be seen from table 8.6, BPCL and IOCL petrol was perceived to be of good quality by the respondents in the income group of Rs. 50,000/--Rs. 1,00,000/- as compared to HPCL which had a better quality perception for its petrol among the respondents of income group above Rs. 1,00,000/-pm and also a similar response was obtained by the respondents having income less than Rs. 50,000/- pm.

Table 8.6: Income-wise Good Quality Perception for Petrol marketed by OMCs

Good Quality Perception for Petrol marketed by OMCs based on Income Groups			
Company	Above Rs1,00,000/- pm	Between 50,000/- to Rs. 1,00,000/- pm	< Rs. 50,000/- pm
HPCL	√		√
BPCL		√	
IOCL		√	

8.1.13 The 2 wheeler respondents exhibited a higher perception of good quality of Petrol being marketed by HPCL and IOCL. BPCL on the other hand enjoyed an equal acceptance of good quality from both the categories of respondents as can be seen in table 8.7.

Table 8.7: Good Quality Perception for Petrol marketed by OMCs based on Type of Vehicle Used

Good Quality Perception for Petrol marketed by OMCs based on Type of Vehicle Used		
Company	2 wheeler respondents	4 wheeler respondents
HPCL	√	
BPCL	√	√
IOCL	√	

8.1.14 The female respondents had a higher perception of good quality of petrol being marketed by BPCL and IOCL whereas the male respondents agreed more with the good quality of fuel from HPCL (refer to table 8.8).

Table 8.8: Gender-wise Good Quality Perception for Petrol marketed by OMCs

Good Quality Perception for Petrol marketed by OMCs based on Gender of Respondents		
Company	Male respondents	Female respondents
HPCL	√	
BPCL		√
IOCL		√

8.1.15 The students had a higher quality perception for petrol from HPCL whereas the housewives perceived the fuel from BPCL to be of good quality. In case of IOCL the responses obtained were very similar for the business category and the housewives who equally perceived the quality of petrol from IOCL to be good (refer to table 8.9).

Table 8.9: Occupation-wise Good Quality Perception for Petrol marketed by OMCs

Good Quality Perception for Petrol marketed by OMCs based on Occupation of Respondents				
Company	Service	Business	Housewives	Student
HPCL				√
BPCL			√	
IOCL		√	√	

8.1.16 Finally as seen in table 8.10, the respondents in the age group of 18-28 years had a perception of good quality of petrol marketed by all the oil marketing companies.

Table 8.10: Age-wise Good Quality Perception for Petrol marketed by OMCs

Good Quality Perception of Petrol marketed by OMCs based on Age of Respondents					
Company	18-28	29-38	39-48	49-58	59-68
HPCL	√				
BPCL	√				
IOCL	√	√			

8.1.17 Income wise difference in the level of agreement with the brand values is noticed in the study. The consumers having their income above Rs. 1,00,000/- pm agreed with the brand value of high quality for HPCL. The respondents having income between Rs. 50,000/- to Rs. 1,00,000/- pm agreed more with associating the brand value of Innovation and Reliable with BPCL as compared to the other two brand value of Care for which the respondents in the income group below Rs.50,000/- pm expressed higher level of agreement. The respondents having income above Rs. 1,00,000/- pm agreed that they could associate the brand value of Care, Innovation and Passion with IOCL. The respondents having income less than Rs. 50,000/-pm could positively associate the brand value of Trust with IOCL. Tables 8.11, depicts income wise agreement with the brand values of oil marketing companies. Where there is association of brand value of high quality with HPCL by the respondents of high income group, the personalised vehicle care and customer care brand values are associated by the respondents of middle income group with the company.

Table 8.11: Highest Agreement with the Brand Values of OMCs based on Income groups

Agreement with the Brand Values of OMCs based on Income groups			
Brand Values	Above Rs.1,00,000/- pm (%)	Between Rs. 50,000/- to Rs. 1,00,000/- pm (%)	< Rs. 50,000/- pm (%)
High Quality (HPCL)	√		
Personalised Vehicle Care (HPCL)		√	
Personalised Customer Care (HPCL)		√	
Innovation (BPCL)		√	
Care (BPCL)			√
Reliable (BPCL)		√	
Care (IOCL)	√		
Innovation (IOCL)	√	√	
Passion (IOCL)	√		
Trust (IOCL)			√

8.1.18 The female respondents exhibited a higher agreement for associating the brand values of Care and Reliable with BPCL. The male respondents exhibited a higher agreement for associating the brand value of High Quality with HPCL. The association of brand values of Care and Trust were agreed more by the male respondents as compared to the female respondents (refer to table 8.12). Of the three brand values of HPCL, the male respondents exhibited a higher level of agreement with high quality and personalised customer care while the females exhibited a higher level of agreement with personalised vehicle care brand value of HPCL. Of the three brand values of BPCL, the female respondents exhibited a higher level of agreement with reliable and care brand values while the male respondents agreed more with the innovation brand value of BPCL. The male respondents agreed more with Care and trust brand values from amongst the four brand values of IOCL (refer to table 8.12).

Table 8.12: Highest Agreement with the Brand Values of OMCs based on Gender of Respondents

Agreement with the Brand Values of OMCs based on Gender of Respondents		
Brand Values	Male Respondents	Female Respondents
High Quality (HPCL)	√	
Personalised Vehicle Care (HPCL)		√
Personalised Customer Care (HPCL)	√	
Innovation (BPCL)	√	
Care (BPCL)		√
Reliable (BPCL)		√
Care (IOCL)	√	
Innovation (IOCL)		√
Passion (IOCL)		√
Trust (IOCL)	√	

8.1.19 The respondents having 4 wheelers exhibited a higher level of agreement with associating the brand values of high quality, personalised vehicle care and personalised customer care with HPCL as compared to the respondents having 2 wheelers who exhibited a higher agreement with associating brand values of Innovation, Care and Reliable with BPCL. The respondents having 4 wheelers also expressed high agreement with associating the brand values of Care and Trust with IOCL while the respondents having a two wheeler associated more with the brand values of Passion and Innovation of IOCL (refer to table 8.13).

Table 8.13: Highest Agreement with the Brand Values of OMCs based on Type of Vehicle Used

Agreement with the Brand Values of OMCs based on Type of Vehicle used by Respondents		
Brand Values	2 wheeler respondents	4 wheeler respondents
High Quality (HPCL)		√
Personalised Vehicle Care (HPCL)		√
Personalised Customer Care (HPCL)		√
Innovation (BPCL)	√	
Care (BPCL)	√	
Reliable (BPCL)	√	√
Care (IOCL)		√
Innovation (IOCL)	√	
Passion (IOCL)	√	
Trust (IOCL)		√

8.1.20 As seen in table 8.14 the respondents belonging to the business class exhibited higher level of agreement with associating the brand values of Innovation and Reliable with BPCL, Care, Passion and Trust with IOCL. The housewives exhibited a higher agreement with associating the brand values of high quality and personalised vehicle care with HPCL. They also exhibited a higher level of agreement with the care brand value of BPCL and Innovation brand value of IOCL. The respondents belonging to the service class expressed high agreement with the association of brand value of Personalised customer care with HPCL while the students agreed the most for associating the brand value of Care with BPCL (refer to table 8.14).

Table 8.14: Highest Agreement with the Brand Values of OMCs based on Occupation of Respondents

Agreement with the Brand Values of OMCs based on Occupation of Respondents				
Brand Values	Service (%)	Business (%)	Housewives (%)	Student (%)
High Quality (HPCL)			√	
Personalised Vehicle Care (HPCL)			√	
Personalised Customer Care (HPCL)	√			
Innovation (BPCL)		√		
Care (BPCL)			√	√
Reliable (BPCL)		√		
Care (IOCL)		√		
Innovation (IOCL)			√	
Passion (IOCL)		√		
Trust (IOCL)		√		

8.1.21 The respondents in the age group of 39-48 years agreed the most for associating the brand values of Care, Innovation, Passion and Trust with IOCL. The respondents in the age group of 18-28 years exhibited a higher agreement for associating the brand value of Innovation and Care with BPCL (refer to table 8.15).

Table 8.15: Highest Agreement with the Brand Values of OMCs based on Age of Respondents

Agreement with the Brand Values of OMCs based on age of Respondents					
Brand Values	18-28	29-38	39-48	49-58	59-68
High Quality (HPCL)					√
Personalised Vehicle Care (HPCL)				√	
Personalised Customer Care (HPCL)					√
Innovation (BPCL)	√				
Care (BPCL)	√				
Reliable (BPCL)					√
Care (IOCL)			√		
Innovation (IOCL)			√		
Passion (IOCL)			√		
Trust (IOCL)			√		

8.1.22 The respondents though exhibited a big difference in their loyalty for the three public sector oil marketing companies, but none of the respondent categories – be it gender based classification, income based classification or the type of vehicle owned based classification exhibited committed loyalty towards any of the oil marketing company (Attri, Pahwa, Urkude, 2011). However based on income classification the respondents IOCL enjoyed higher loyalty from the respondents having the income above Rs. 1,00,000/- pm and also from those having income less than Rs. 50,000/- pm. BPCL enjoyed higher loyalty from the respondents having income more than Rs. 1,00,000/- pm while HPCL had higher loyalty exhibited by those in the income group of less than Rs. 50,000/- pm as well as those between Rs. 50,000/- to Rs. 1,00,000/- income bracket (refer to table 8.16).

Table 8.16: Highest Loyalty exhibited for OMCs based on Income Groups

Loyalty Exhibited for OMCs based on Income Groups			
Company	Above Rs1,00,000/- pm	Between 50,000/- to Rs. 1,00,000/- pm	< Rs. 50,000/- pm
HPCL		√	√
BPCL	√		
IOCL	√		√

8.1.23 With regards to the type of vehicle owned by the respondents, the loyalty towards IOCL was expressed by both the respondent groups. The respondents having 2 wheelers expressed higher loyalty towards HPCL through their purchase behaviour whereas the respondents having a four wheeler were more loyal towards BPCL (refer to table 8.17).

Table 8.17: Highest Loyalty Exhibited for OMCs based on Type of Vehicle Used

Loyalty Exhibited for OMCs based on Type of Vehicle Used		
Company	2 wheeler respondents	4 wheeler respondents
HPCL	√	
BPCL		√
IOCL	√	√

8.1.24 As seen from table 8.18, the female respondents were more loyal towards HPCL and BPCL while the male respondents were more loyal towards IOCL

Table 8.18: Highest Loyalty Exhibited for OMCs based on Gender

Loyalty Exhibited for OMCs based on Gender of Respondents		
Company	Male respondents	Female respondents
HPCL		√
BPCL		√
IOCL	√	

8.1.25 The respondents belonging to the service class and the business class exhibited higher loyalty towards BPCL and IOCL while the housewives exhibited higher loyalty towards HPCL (refer to table 8.19).

Table 8.19: Highest Loyalty Exhibited for OMCs based on Occupation

Loyalty Exhibited for OMCs based on Occupation of Respondents				
Company	Service	Business	Housewives	Student
HPCL			√	
BPCL	√	√		
IOCL	√	√		

8.1.26 The respondents in the age bracket of 18-38 years exhibited equal level of loyalty towards all the oil marketing companies whereas the respondents in the income group of 39-48 years were more loyal towards HPCL (refer to table 8.20).

Table 8.20: Highest Loyalty Exhibited for OMCs based on Age of Respondents

Loyalty Exhibited for OMCs based on Age of Respondents					
Company	18-28	29-38	39-48	49-58	59-68
HPCL	√		√		
BPCL	√				
IOCL	√				

8.1.27 Thus the research on the constructs for studying customer based brand equity revealed that HPCL had the highest awareness for tag lines, IOCL had the highest awareness of its loyalty cards, BPCL had the highest awareness for its convenience stores and branded petrol and finally HPCL had the highest awareness for its promotional campaigns. HPCL had the highest perceived quality for the petrol marketed. The association of the respondents with the brand values of HPCL was highest while IOCL enjoyed the highest loyalty of the respondents as can be seen in table 8.21.

Table 8.21: Customer Based Brand Equity of OMCs

Customer Based Brand Equity Constructs	HPCL	BPCL	IOCL
BRAND AWARENESS			
Tag Lines (%)	58.7%	24.3%	18.9%
Rank	1	2	3
Loyalty Card (%)	16.5%	10.9%	30.7%
Rank	2	3	1
Convenience Store (%)	6.9%	35.2%	10.1%
Rank	3	1	2
Branded Petrol (%)	25.1%	40.3%	34.1%
Rank	3	1	2
Promotional Campaigns (%)	17.1%	5.9%	12%
Rank	1	3	2
PERCEIVED BRAND QUALITY (Weighted Score)	.571	.481	.49
Rank	1	3	2
BRAND ASSOCIATION (Average Weighted Score)	.235	.187	.191
Rank	1	3	2
BRAND LOYALTY (Weighted Score)	2.169	2.121	2.372
Rank	2	3	1

- 8.1.28 There was negligible recognition of the advertisements and OOH (Out of Home) creatives of the OMCs by the customer. There were negligible correct responses when the respondents were shown the creatives of the advertisements of OMCs and were asked to name the OMC which they thought the advertisement indicates towards. This indicates that the hoardings that are currently positioned only at the retail outlets have failed to register in the minds of the consumer and are drawing minimal consumer attention.
- 8.1.29 The e-initiatives of having contests, advertising through banners or sponsoring carried out BPCL and IOCL in 2003, 2004 did not keep the same momentum and these companies registered negligible presence in the popular internet sites post 2004. The websites of the oil marketing companies are impressive and have detailed information about the company but all the marketing communications available on these websites does not reach the end consumer as he /she is having no reason to visit the company websites. This situation is unlike other high involvement consumer goods where the consumer makes an effort to compare the products of various companies by visiting their official websites and then undertaking a comparative analysis of items belonging to the same product class.
- 8.1.30 Erratic service levels are observed at the different retail outlets of the same OMC. The campaigns of **“Pure for Sure- BPCL”**, **“Club HP Achcha Lagta Hai- HPCL”**, and **“Ek dum Tez Service Ke Liye Hum Tayaar Hain- IOCL”** after exhibiting for some time, the promises made during the launch, have failed to continue with the same spirit of service.

8.2 RECOMMENDATIONS

If a brand is to survive in today's competitive times, it has to fight for its share of the consumer's mind and heart and eventually for market share. It must be strong and fit and use its abilities as weapons. Every day and in every way,

marketers try every move they know- covert and overt – to boost sales and increase the equity of their brand. The objective is to increase the perceived value of the brand in the minds and hearts of consumers. Brand ability is a weapon, an expertise, a power, a strategy and a skill which would help the brand grow consistently in positive awareness, trials and repeats.

In the present market conditions there is a dual challenge before the oil companies:

- (a) One to create a perception of the best oil company dealing in fuels and
- (b) Second to carry out a proper product positioning of their high end fuels.

Following are suggestions/recommendations based on the research carried out

- **Increase the Awareness Level of the customers**
- **Work towards Building a superior quality perception**
- **Work towards rational and emotional brand values**
- **Deploy CRM activities for enhanced brand loyalty**

8.2.1 IMPROVE THE BRAND AWARENESS LEVEL

It is an established fact that if a brand continuously enjoys high brand awareness then the consequence would be that it would ultimately drive its competitors who are positioned lower in brand awareness to obscurity. Becoming a best-remembered brand is an inconsequential achievement.

To purchase most products and services require more than simple brand awareness. Brand awareness is important for low-involvement purchases, because consumers will often decide from a list of recalled brands brought directly from memory. It is no surprise, therefore, that when brands are measured by awareness most of the top ten brands are in low-involvement categories, such as breakfast cereal and detergent. Brands in these categories are purchased and used frequently.

Learning from how British Petroleum succeeded in enhancing the brand awareness amongst their customers through their punch line of Beyond Petroleum and their continuous improvement in their services, the Indian OMCs can also design one punch line which can be easily remembered and continue using the same in all their marketing communications.

Following action plan can be deployed by oil marketing companies towards increasing their brand awareness:

- **Top Of Mind Awareness (TOMA) through Marketing Communications**

The female respondents exhibited a higher level of brand awareness for the punch lines of oil marketing companies and their sub brands as compared to the male respondents. This finding can be used to target female customers with various value propositions with which they can identify.

All the oil marketing companies claim to be known for certain brand values which as of now are not strongly positioned in the customer's mind. Thus by establishing TOMA (Top Of Mind Association) through continuous reminders in the form of above the line marketing communications using television as media, the company would be able to position distinct brand values amongst its customer segment.

The Preliminary research findings indicate that 69.23% of the respondents strongly agree to the statement that marketing communication activities helped in building brand recognition. Another 53.85% respondents strongly agree that such marketing communication activities result in the perception of a quality product.

In the wake of these revelations it would be appropriate to suggest interval schedule for integrated marketing communications. The companies should run their television ads whenever some promotional schemes are to be announced so that the customer segment from whom a particular action is expected is able to respond.

- **Effective use of OOH (Out of Home Media)**

The preliminary research conducted to understand the consumer awareness level of the out of home marketing communications involved showing the print outs of the hoardings displayed at the retail outlets of these companies. The brand name was covered and the respondents were asked to state the name of the oil marketing company. The majority of the respondents were unable to recall the company name upon seeing the print out of the hoarding.

The reason stated by the respondents for such a poor recall was that these hoarding are put up at the retail outlet and the customer does not have an inclination to comprehend what is being stated through these hoardings.

The OMCs should consider the placement of the hoardings at prominent places where the visibility is maximum. Hoardings can also be identified at a distance of 500 metres before the approach to the petroleum retail outlet.

- **E-Branding**

Companies today have taken up e-Branding to unleash potential of social networks.

For example the first place serious buyers go when shopping for a new car is internet which is easily accessible today from home, office, cyber cafes and mobile phones. Study carried out by J D Power and Associates reveals that 85% of the serious buyers visit the manufacturer's website before going to the dealer for a test drive.

The company websites is not visited by the customer as purchase of fuel for vehicle is a routine activity and thus falls in the category of low involvement product.

Oil marketing companies should have their presence through innovative games, contests etc. in the most visited websites and social networking sites where the customer would be prompted to click and learn more about the product or the contest. The OMCs can also have scrolls on the website

displaying pollution levels of various cities and hence emphasise on the use of cleaner fuel with additives. The same can also be done through banners and pop ups on popular websites.

8.2.2 REINFORCE SUPERIOR BRAND QUALITY IMAGE

- **Market Segmentation**

Since it has come out very clearly from the research that the perception of the brand values is different for different income groups, gender, age groups, occupation and the types of vehicles used it is important for the OMCs to have a clear distinction of their target market based on the consumer behaviour and their consumption patterns of different income groups. Thus the task that needs to be accomplished is to carry out a demographic segmentation based on income and probe deeper into the unstated desires as regards to the fuel purchase by different segments of the society.

- **Establish Segment-wise Brand Positioning**

Each of the oil marketing company has some unique brand values (as exhibited in their official literature), for which they want to be known in the marketplace. These brand values are as follows:

- a) HPCL Brand Values- High Quality, Personalised Vehicle and Customer Care
- b) BPCL Brand Values- Innovation, Care and Reliability
- c) IOCL Brand Values- Care, Innovation, Passion and Trust.

The first task for the companies to be accomplished is to work towards identifying key attributes to be communicated so that they can start clearly differentiating themselves on the selected value/s. Only when the company clearly differentiates on the values offered, can it “engineer” the brand strategies into the marketing mix.

For example a particular brand value (say passion) may be well received and remembered by a particular target audience but another group of target market may find difficulty in relating with that value. If the company is able to make the consumer associate with reputation value along with the utilities of these fuels then it would automatically fall into the consideration set of such customer who would claim using expensive fuel with pride.

A word of caution here is that the companies should respect the fact that branding is broadly based on the concept of singularity. Hence OMCs need to identify and draw out plans to emphasis only on the key brand values to be communicated and positioned in the minds of the target customer. The brand values conveyed through marketing communication activities would become the discussion point and travel with a positive word of mouth as there would either be symbolism of status or utility associated with its use.

Thus the old retail truism of having the right product at the right place at the right time should now be positioned “for the right customer”.

- **Capability building of Sales Personnel**

During detailed discussions, the retailers revealed that the less preference for the branded fuel was that majority of customer saw no difference between the branded and unbranded fuel. Also the salespeople who dispense fuel do not hard sell the branded fuel as it may be perceived adversely by the customer. Hence there is no distinct image in the mind of the customer for a branded fuel. Moreover besides the lack of knowledge about the beneficial properties of using high octane fuel with additives, there is no parallel motivation for the customer to consider the premium product. If the people deployed down the value chain are adequately trained they will resonate the brand value. Salespeople are considered as channels rather than creators of brand value. They convince clients and prospects of the value proposition with effective salesmanship. The marketing companies should design regular training/capability building programmes to make the Point of Sale (POS) personnel of retail outlets adept in their selling skills. It has been voiced out by the retailers that at present there is lack of such regular trainings and these personnel do a

much mechanised job of dispensing fuel and billing the customer. With proper training they can smartly answer the queries of the customer related to branded fuel and build a unique identity of the product.

8.2.3 ESTABLISH CUSTOMER CONNECT WITH KEY BRAND VALUES

- **Brand Activation**

Brands connect with customers on an emotional level. Advertising has always been seen as main weapon to build brands by the brand managers. Excessive reliance on this form of communication has resulted in “over communication”. Marketers are therefore exploring new ways of supporting their brand. One such method is called Brand Activation which comes under the category of Below the Line activities.

Brand activation can be defined as marketing process of bringing a brand to life through creating brand experience. Generally, the core features or brand values of a brand are used for activation. That’s what every brand manager strives to achieve i.e. communicating their brand values to their target customers.

Although the benefits of Above the Line (ATL) marketing communication activities cannot be undermined but to begin with, the oil marketing companies need to interact with the customers to identify their stated and unstated desires. This objective can be achieved through successful brand activation.

It is therefore very important for OMCs to have repeated frequent interactions with the customers through innovative means where the customer is able to foresee the advantages of premium fuel or patronising one OMC over other and thus overall have connect with the oil marketing company. Presently all OMCs are doing this brand activation at a very low key i.e. one- two activation in a financial year, whereas such brand activations are done on a weekly to

fortnightly basis by international oil companies outside India. Such frequent interaction of international oil marketing companies with the customers has resulted in increased customer loyalty. Thus the OMCs should consider adopting a similar approach.

8.2.4 BUILD LOYALTY THROUGH CUSTOMER RELATIONSHIP MANAGEMENT

- **Innovative Loyalty card schemes**

The present boom in the organised retail in India and transition from mom and pop stores to supermarkets has attracted the Indian consumer where customer loyalty cards are issued free of cost just at the fill up of form at retail chains of Apparel, FMCG etc. The companies can learn from this and likewise at the filling up of form issue loyalty cards instantly. Also the requisite of preloading the card needs to be scrapped as the customers find it more of a hassle. The added benefits of using the loyalty cards for example discounts on purchase from certain retail outlets, eating joints and movie tickets needs to be communicated continuously through print media so that the customer is very clear of the benefits of having the card and their usage is maximised . The higher the number of people having the loyalty cards the better and more effective would be the customer relationship management by oil marketing companies since now the company can send personalised e-mails and SMS to their database of consumers. Customer Relationship Management can be used effectively as a communication platform with the consumers and keep them interested in the company through announcements of various schemes and sales promotions designed.

- **Instant reward schemes**

Some scheme of instant rewards (not in the form of points but assured gifts) should be devised and implement on a monthly basis to attract the customer. For instance upon refuelling to full tank capacity some reward can be announced which would create a buzz amongst the customers . Introduce giveaways in the form of key rings, car perfumes, small gifts to consumers for

patronising the company. The giveaways should have the promotional branding for increasing brand awareness and recall.

- **Personalised Consumer Purchase Experience**

As no business today is devoid of a service element, Oil Marketing companies can hugely benefit by improving and continuously tracking their service standards. Inconsistent service levels at different retail outlets of the same OMC has resulted in poor brand image. The OMCs need to make service the key differentiator & follow a consistent professional approach to deliver uniformity in service. This would help them reassess their brand building activities as far as service components are concerned and a corrective action can be initiated. Though convenience store is a successful model in the west, it has been seen that many convenience stores in India have been forced to shut down because of low footfalls of customers to purchase non fuel products like cold drinks, cookies, chips etc. When the retail outlet owners who have shut down their convenience stores in the last two years were asked for the reason for the same through in depth interviews they attributed this to the lack of parking space for the vehicles which deters the customers to venture out in the convenience stores.

In the wake of this scenario, the marketing companies need to rethink their non-fuel retailing strategy. The advent of free home delivery of groceries, FMCG products and food items has a background of strong need of these retail outlets to become the most preferred choice of the customers. To achieve this, these retailers increased the convenience level offered to the customer and helped accomplishing customer relationship management. Thus their lookout was “If the customer is unwilling to venture out for purchases we will reach out to the customer”.

Thus if oil marketing companies want to increase their profit margins they need to overhaul their convenience stores and think of innovative ways of reaching out to the customers and enhance the customer purchase experience. One option is to create shelf space in the canopies of the retail outlets. There is always time available with the customer while he is waiting in queue to re-fuel

his vehicle. If he can purchase the non-fuel products from the comfort of not leaving his vehicle, it will increase consumer purchase experience.

- **Deployment of PDCA Cycle to monitor brand building initiatives**

Insights from discussions with company officials revealed that on-going customer research is not conducted by oil marketing companies and the work of these officials revolve around identifying new locations for setting up of petrol stations, doing the viability test and accomplishing various compliance related tasks to commission these petrol stations. Besides this, they are also quite busy with the day to day sales tracking, doing supply chain management to ensure smooth and hassle free availability of the product and attending to any grievances of the channel partners. Identifying the prevailing brand perceptions through analysis of VOC (Voice of Customer) and providing inputs to the marketing team so that effective brand building measures could be deployed is not an area where they focus their attention. It is very important for companies to have a good understanding of the prevailing brand culture. The PDCA cycle (Plan Do Check and Act) needs to be effectively deployed and rigorously monitored as part of the daily management process. This would give an insight into the prevailing perceptions in the form of brand culture (brand stories, images, associations etc.) in the customer's mind and also help in identifying redundant and ineffective activities which need to be modified in the wake of the changing environmental factors and the evolving customer base.

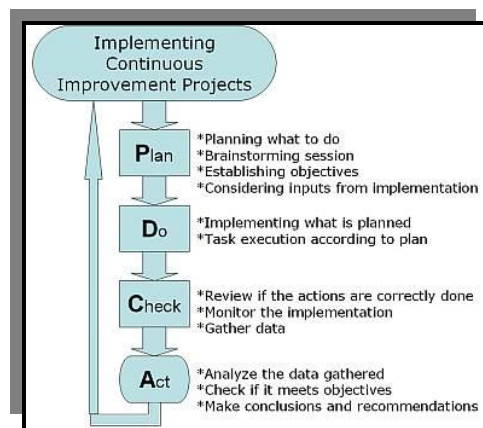


Exhibit 8.1: PDCA Cycle

8.3 LIMITATIONS OF THE RESEARCH

Due to human and financial constraints the scope of the research has been limited to studying customer based brand equity for petrol marketed by public sector oil marketing companies in Indore. There is very limited literature available on brand management of oil marketing companies. The company websites and newspaper articles were the only source for gathering data on brand building activities of the oil marketing companies both in the Indian as well as international context.

8.4 SCOPE FOR FUTURE RESEARCH

There is a lot of scope to carry out research in the area of brand management of oil marketing companies. Following are some prospective areas of research in this context:

- A comparative analysis of brand building activities of the public sector oil marketing companies with the private oil marketing companies can be carried out to study the difference in the brand building approaches followed.
- Customer Based Brand Equity of the public sector oil marketing companies taking diesel as the product under study can be carried out.
- A comparative study of the customer based brand equity of public sector oil marketing companies operating in a metro city with that of a tier II city can be undertaken to understand the difference if any that exists in the brand equity enjoyed by these companies in these two areas of operation.
- Each of the public sector oil marketing companies appoints several creative agencies for a period of three year to carry out the corporate branding tasks. After this time period fresh quotations are invited from the creative agencies. The companies divide the creative mandate geographically and these agencies are given particular sectors/ zones for carrying out their marketing communication activities. A comparative study of above the line and below the line marketing communication activities can be carried out in different zones to understand the pattern of integrated marketing communications.

CHAPTER-9

SUMMARY

*A Study of Customer Based Brand Equity for Public Sector Oil Marketing Companies
with Special Reference to the City of Indore*

CHAPTER 9

SUMMARY

This thesis “A Study of Customer Based Brand Equity for Public Sector Oil Marketing Companies with Special Reference to the City of Indore”, attempts to understand the brand equity of public sector oil marketing companies in the minds of the customers.

The oil industry influences almost all aspects of business, economics and geopolitics throughout the world. India's oil market is the world's seventh-largest and has so far been dominated by state firms such as the IOCL, BPCL and HPCL, especially in the marketing of petroleum products. These represent pretty strong brands amongst themselves, but one particular customer behavior that has intrigued the marketers and researchers for long has been the indifference exhibited by fuel consumers while making choice amongst these three brands to refuel their vehicles.

In the oil marketing business, product differentiation is very hard to sustain. Despite the fact that companies have introduced different octane fuels and additives have been added to fuel, the apparent lack of switching costs creates a challenge for marketers as consumer has no reason to stay with one particular brand. The real efforts towards brand building by Oil Marketing Companies started in the year 2002 when the marketing of auto-fuel products was deregulated. In anticipation of deregulation, the first action taken by the oil marketing companies was to improve the appearance of their outlets. The objective was to create outlets that are not just attractive but also serve as

branding tools for the company. Advertising campaigns and brand promotions enhanced by brand ambassadors were utilized by Oil Marketing Companies to create differentiation and hence enhance visibility. Introduction of convenience stores, food outlets etc. at the retail outlets was an attempt to provide non fuel revenue stream for retail outlets while providing a value added service to the customer.

Although the Public Sector Unit Oil Marketing Companies have been constantly focusing on building their brand identity through modernization of the retail outlets, introduction of high octane fuels with additives, convenience stores, loyalty cards, marketing communications, sponsorships, brand promise campaigns etc., there is still an element of indifference which is visible in the consumer behaviour while deciding on purchase of auto-fuel.

Since almost a decade has passed when the oil marketing companies started their brand building initiatives and not much research has been done to study the customer based brand equity for Public Sector Oil Marketing Companies hence a need was felt to carry out research in this direction and this motivated the researcher to study the customer based brand equity for the public sector oil marketing companies.

This research has been designed to get a deeper understanding of the brand awareness, customer loyalty, perceived brand quality and customer association with the brand values of these companies. This would lead to an understanding of brand equity concept in relation to Oil Marketing Companies and would have implications for practitioners working in this industry.

In highly competitive markets, the brand equity is very necessary. Brand equity can help establish consumer satisfaction, repurchasing intent and increases degree of loyalty. Because the aim of brand equity is to maintain or increase the level of competitive advantage of the firm, this study would help the company officials of the public sector oil marketing companies understand the performance of their brands with relation to their competition and provide them with the insights of areas they need to work upon to increase the

customer based brand equity of their organizations. Brands need to be periodically measured in terms of the impact generated on consumers, stimulating market demand and exploring opportunities for proliferation. The study would help the Oil Marketing Companies (OMCs) to understand their brand awareness, perceived quality, brand association and brand loyalty exhibited by the customers.

This study would also help the Oil Marketing Companies to develop consumer insight for their company and have a comparative analysis of their customer based brand equity parameters with those of the competitors.

In order to study Customer Based Brand Equity one needs to study brand awareness and loyalty expressed by the customers, their association with the brand values and their perception of brand quality. Lot of marketing efforts has been put forth by each oil marketing company to increase the level of brand loyalty and awareness amongst the customers. The oil marketing companies introduced branded auto-fuel, convenience stores and loyalty cards etc. to differentiate themselves in the market place. Each of the oil marketing company also claim to be known for certain values amongst the customers, for example HPCL claims to be known for High Quality, Personalised Vehicle Care and Customer Care; BPCL claims to be known for Innovation, Care and Reliable (abbreviated as InCaRe in company literature) and finally IOCL claims to be known for Care, Innovation, Passion and Trust (abbreviated as CIPT in company literature).

A study to assess the level of customer awareness and agreement with each of these brand values of the oil marketing company would help understand the customer association levels with these companies. In order to understand the customer based brand equity of the oil marketing companies, an understanding of perceived quality of fuel and their brand loyalty for these companies also needs to be studied. The objectives thus framed for this research are as follows:

- To study the brand awareness levels of the customers for the public sector oil marketing companies.
- To study the perception of quality by the customers for petrol marketed by the public sector oil marketing companies.
- To study the level of association of the customers with the brand values of each of the public sector oil marketing company.
- To study the level of customer loyalty for each of the public sector oil marketing company.

Although the need is to study the brand building activities of all the Oil Marketing Companies in India across all states but due to constraints on time, financial and physical resources, the researcher has scaled down the scope of research in terms of (a) geographical spread and (b) products marketed by the Oil Marketing Companies. As far as geographical spread is concerned the city of Indore in Madhya Pradesh has been selected. In product category the focus has been kept on marketing of Petrol.

Following methodology was followed to quantitatively measure the components of customer brand knowledge:

- The researcher has studied the top of the mind awareness by asking the respondent to name the company that sells petrol (Question 8 in questionnaire, Appendix 1). The first name that is taken by the respondent is the measure of the brand position in his/her mind. Although the respondent may be aware of many other companies which sell petrol, but the fact that he/she responds with a particular brand name as a response to the query put forth by the researcher would reflect that the brand mentioned enjoys a higher position in the mind of the respondent as compared to other brands.
- Brand Awareness is further measured through customer recognition of the marketing communication messages/ punch lines (question 16 in questionnaire, Appendix 1) and also linking up the sub brands (like branded petrol, convenience store, loyalty cards etc.) with the Oil

Marketing Companies (question 18 in questionnaire, Appendix 1). Brand recall reflects the ability of consumers to retrieve the brand from memory when given the product category and this reflects the ability of consumers to confirm prior exposure to the brand. Hence the method of aided brand recall is employed for measuring the brand awareness.

- The researcher has studied the perceived quality of the products of the Public Sector Oil Marketing Companies by constructing a five point likert scale ranging from superior quality to worst quality and the respondent is asked to state their feeling about the quality of petrol and non-fuel services offered by these companies (question 9, 10, 11 & 12 in questionnaire, Appendix 1).
- Each of the Public Sector Unit Oil Marketing Company claims in their literature that all their activities are focused towards exhibiting certain brand values for which they are known or aspire to be known in the market place. For example HPCL claims to be known for High Quality, Personalised Vehicle care and Personalised Customer care; BPCL for Innovation, Care and Reliability (abbreviated in company literature as InCaRe); and IOCL for Care, Innovation, Passion and Trust (abbreviated in company literature as CIPT). The researcher has studied Brand Association by using Scaling technique as it is much more objective and reliable than Projective techniques employed for the same. The level of customer association with the brand values of the Public Sector Unit Oil Marketing Companies as communicated in their literature is assessed using a five point Likert scale where the customer response ranges from strongly agreeing with the brand value to strongly disagreeing with the same (Question 17 in questionnaire, Appendix 1).
- The researcher has studied Brand Loyalty through a five point likert scale ranging from “only purchase from this company” on one end and “never purchase from this company” on the other end of the scale (Question 13 in questionnaire, Appendix 1). The consistent repeat purchase is one kind of ‘Loyalty-Prone’ behaviour which forms the

base for brand loyalty. The strength of behavioural brand loyalty is therefore directly a function of the repetitive occurrence of purchase or consumption behaviour. The qualitative response of the respondent towards the reasons for visiting a particular petrol pump (Question 14 & 15 in questionnaire, Appendix 1) would help in analysing the level of loyalty expressed by the customers i.e. whether they are pseudo-loyals or committed loyals.

The study was sequential in nature which involved conducting a preliminary survey to broadly understand the consumer behavior. For this purpose 74 customers, 47 dealers (Appendix 2) and 6 company officials (Appendix 3) were surveyed to collect quantitative as well as qualitative data. The insights gained from this preliminary survey helped in framing the final questionnaire for the research to be conducted. Also from this preliminary survey on consumers, the standard deviation figures for the sample were arrived at, which were used in calculating the sample size to be finally studied.

Secondary data from the published sources on the international oil companies and those operating in India was collected to understand the brand building activities followed till date. Various journals on brand management, consumer behavior, services marketing and oil and gas were referred to for literature review. The resources of e-libray like Proquest, Harvard Business Review and Ebsco were used to gain insight into the research papers published on the fuel branding in particular and branding in general. Data was also collected from CMIE (Centre for Monitoring Indian Economy) to gain insight into the oil companies operating in India.

Research was conducted using quantitative techniques. The customer target population has been defined as the people who drive cars or motorcycles/scooters on the roads of Indore. Care was taken not to approach the respondents at the retail outlets of the petroleum companies so that the responses are unbiased. Stratified probability sampling method was used for customer selection. The demographic variables were taken into account for better representation of sample. In view of the exploratory nature of the study

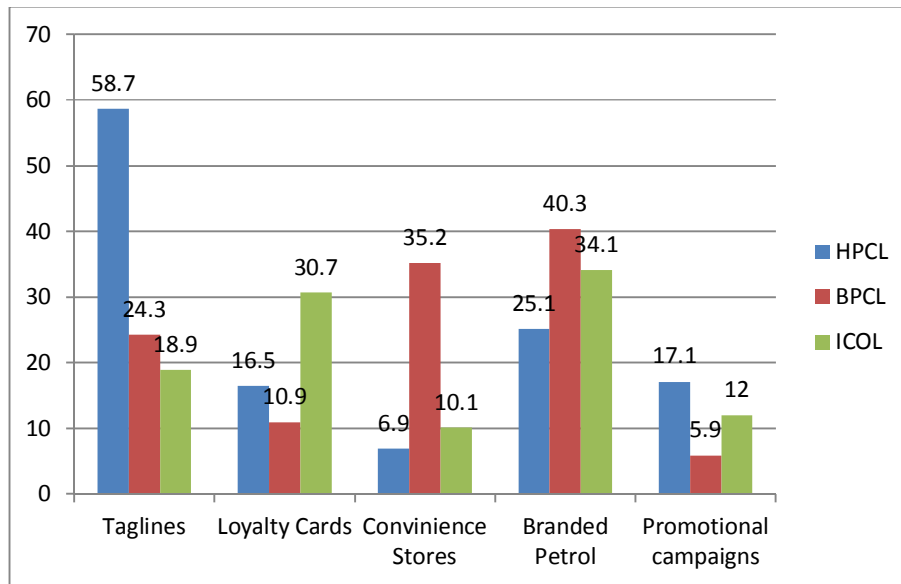
and to enhance the data collection, prior to conducting the pilot studies, the initial questionnaire received extensive reviews and suggestions from four senior academicians with expertise on the subject matter. To ensure "respondent-friendly" structured questionnaire, it was pilot tested with 10 academicians and 20 customers before commencing the actual study. The sample size of about 400 customers was targeted for the survey. About 25 responses were discarded due to incomplete filling of questionnaire and the analysis was done on the remaining 375 responses. The primary data collected is analyzed using the following statistical tools using SPSS 17.0 (Statistical Package for Social Sciences).

Table 9.1 and exhibit 9.1 give an overall picture of the awareness level exhibited by the respondents for the three oil marketing companies under study. HPCL leads in the awareness of the taglines of this company by the customers. The respondents still remembered the "Club HP- Achcha Lagta Hai" brand campaigns of HPCL. The highest level of awareness for the loyalty cards was for IOCL Xtrarewards cards. In terms of awareness of the convenience stores, BPCL was the leader with the highest percentage of respondents being able to correctly recall the In & Out convenience stores of BPCL. The company also enjoyed the highest awareness of the respondents for its branded petrol "Speed". The promotional campaign of HPCL received the highest awareness level (see table 9.1).

Thus where on one hand HPCL enjoyed the highest awareness of its tag line and promotional campaign, it received the least awareness for its branded petrol and convenience stores. Similarly IOCL had highest awareness for its loyalty card but had the least awareness for its tag line amongst the three companies. BPCL had the highest awareness for its branded petrol but the least awareness for its loyalty cards and promotional campaigns.

Table 9.1: Company-wise Brand Awareness Exhibited by Respondents

Brand Awareness Parameters	Correct Response	Correct Response	Correct response
	HPCL (%)	BPCL (%)	ICOL (%)
Taglines	58.7	24.3	18.9
Loyalty Cards	16.5	10.9	30.7
Convenience Stores	6.9	35.2	10.1
Branded Petrol	25.1	40.3	34.1
Promotional campaigns	17.1	5.9	12

**Exhibit 9.1: Company-wise Brand Awareness Exhibited by Customers**

(X-axis represents awareness dimensions and Y-axis represents the percentage of correct response)

The overall response for perceived quality for the petrol marketed by the public sector oil marketing companies indicates that a higher percentage of respondents perceived the quality of petrol marketed by HPCL to be of superior quality. The respondents could not comment much on the non-fuel facilities offered by the oil marketing companies. In order to achieve a score for comparing the perceived quality of the OMCs a weightage of 2 was given to Superior quality and a weightage of 1 was given to Good quality. The responses where the respondents could not comment anything about the quality of the petrol marketed by these companies were given a weightage of 0 and a weightage of -1 was given to the bad quality responses. Upon

calculation it is observed in table 9.2 that the perceived quality of petrol of HPCL was higher than that of other two companies. This was followed by higher perceived quality for IOCL and lastly that of BPCL.

Table 9.2: Weighted Perceived Quality Scores of OMCs

Quality Parameters	HPCL	BPCL	IOCL
Superior Quality	8.30%	5.10%	3.20%
Weightage	2	2	2
Score	0.166	0.102	0.064
Good Quality	43.70%	40%	44.50%
Weightage	1	1	1
Score	0.437	0.4	0.445
Can't Say	44.80%	52.80%	50.40%
Weightage	0	0	0
Score	0	0	0
Bad quality	3.20%	2.10%	1.90%
Weightage	-1	-1	-1
Score	-0.032	-0.021	-0.019
Total Score	0.571	0.481	0.49

Thus based on the customer perception the perceived quality of petrol of HPCL is of a better quality than those marketed by IOCL and BPCL.

In order to achieve a score for comparing the level of agreement for associating certain brand values with the OMCs a weightage of 2 was given to Strong agreement of the customer for associating the brand value with the OMC and a weightage of 1 was given to Agreement with these brand values. The responses where the respondents neither agreed nor disagreed with associating the brand value with the company were given a weightage of 0 and a weightage of -1 was given to the responses where the respondent expressed his disagreement for associating a particular brand value with the company. Table 9.3, 9.4 and 9.5 give the weighted average score of the respondents for their agreement in associating certain brand values with HPCL, BPCL and IOCL respectively.

Table 9.3: Wt. Average Score for Association of Brand Values with HPCL

Agreement with Brand Values	High Quality (HPCL)	Personalised vehicle care (HPCL)	Personalised customer care (HPCL)
Strongly Agree	6.90%	2.70%	0.30%
Weightage	2	2	2
Score	0.138	0.054	0.006
Agree	43.70%	31.70%	23.20%
Weightage	1	1	1
Score	0.437	0.317	0.232
Neither Agree Nor Disagree	45.90%	41.60%	56.30%
Weightage	0	0	0
Score	0	0	0
Disagree	3.50%	24%	20.30%
Weightage	-1	-1	-1
Score	-0.035	-0.24	-0.203
Total Score	0.54	0.131	0.035
Total Weighted Average Score		0.235	

Table 9.4: Wt. Average Score for Association of Brand Values with BPCL

Agreement with Brand Values	Innovation (BPCL)	Care (BPCL)	Reliable (BPCL)
Strongly Agree	2.70%	6.90%	6.70%
Weightage	2	2	2
Score	0.054	0.138	0.134
Agree	21.90%	26.40%	36.00%
Weightage	1	1	1
Score	0.219	0.264	0.36
Neither Agree Nor Disagree	53.60%	40.00%	45.10%
Weightage	0	0	0
Score	0	0	0
Disagree	21.90%	27%	12.30%
Weightage	-1	-1	-1
Score	-0.219	-0.267	-0.123
Total Score	0.054	0.135	0.371
Total Wt. Average Score		0.187	

Table 9.5: Wt. Average Score for Association of Brand Values with IOCL

Agreement with Brand Values	Care (IOCL)	Innovation (IOCL)	Passion (IOCL)	Trust (IOCL)
Strongly Agree	4.00%	4.00%	4.00%	6.70%
Weightage	2	2	2	2
Score	0.08	0.08	0.08	0.134
Agree	44.00%	19.20%	18.90%	47.50%
Weightage	1	1	1	1
Score	0.44	0.192	0.189	0.475
Neither Agree Nor Disagree	37.60%	51.50%	43.50%	28.80%
Weightage	0	0	0	0
Score	0	0	0	0
Disagree	14.40%	25%	33.60%	17.10%
Weightage	-1	-1	-1	-1
Score	-0.144	-0.254	-0.336	-0.171
Total Score	0.376	0.018	-0.067	0.438
Total Wt. Average Score	0.191			

The weighted average score for association with the brand values is 0.235 for HPCL (refer to table 9.3), 0.187 for BPCL (refer to table 9.4) and 0.191 for IOCL (refer to table 9.5). Thus from the brand association scores it is inferred that HPCL enjoyed a higher agreement level of the respondents for associating the brand values of high quality personalised vehicle and customer care with the company. IOCL occupied a second position in the brand association scores followed by HPCL.

In order to achieve a score for comparing the loyalty exhibited by the respondents towards the OMCs through their purchase behaviour a weightage of 4 was given to responses for “Only purchase from this Company”; a weightage of 3 was given to responses for “Mostly Purchase from this Company”; weightage of 2 was given to responses for “Sometimes purchase from this company” and finally a weightage of 1 was given to responses for “Rarely Purchase from this company”. The weighted loyalty scores of 2.169 for HPCL, 2.121 for BPCL and 2.372 for IOCL as calculated in Table 9.6

clearly indicate that IOCL enjoys a higher loyalty of the respondents as compared to the other two companies.

Table 9.6: Weighted Loyalty Scores for the OMCs

Purchase Behaviour	HPCL	BPCL	IOCL
Only Purchase	8.30%	7.70%	12.30%
Weightage	4	4	4
Score	0.332	0.308	0.492
Mostly Purchase	20%	14%	24%
Weightage	3	3	3
Score	0.6	0.42	0.72
Sometimes purchase	52%	61%	52%
Weightage	2	2	2
Score	1.04	1.22	1.04
Rarely purchase	19.70%	17.30%	12%
Weightage	1	1	1
Score	0.197	0.173	0.12
Total Score	2.169	2.121	2.372

Though there is a very small difference in the weighted loyalty scores for the OMCs which is supported by the purchase behaviour observed of the customer who normally visits a petrol pump enroute to his home or work place, still from the responses gathered from the research it is concluded that IOCL enjoys a higher brand loyalty of the respondents followed by BPCL and lastly HPCL. Following are suggestions/recommendations based on the research:

- **Increase the Awareness Level of the customers**
- **Work towards Building a superior quality perception**
- **Work towards rational and emotional brand values**
- **Deploy CRM activities for enhanced brand loyalty**

IMPROVE THE BRAND AWARENESS LEVEL

It is an established fact that if a brand continuously enjoys high brand awareness then the consequence would be that it would ultimately drive its competitors who are positioned lower in brand awareness to obscurity. Becoming a best-remembered brand is an inconsequential achievement.

To purchase most products and services require more than simple brand awareness. Brand awareness is important for low-involvement purchases, because consumers will often decide from a list of recalled brands brought directly from memory. It is no surprise, therefore, that when brands are measured by awareness most of the top ten brands are in low-involvement categories, such as breakfast cereal and detergent. Brands in these categories are purchased and used frequently.

Learning from how British Petroleum succeeded in enhancing the brand awareness amongst their customers through their punch line of Beyond Petroleum and their continuous improvement in their services, the Indian OMCs can also design one punch line which can be easily remembered and continue using the same in all their marketing communications.

Following action plan can be deployed by oil marketing companies towards increasing their brand awareness:

- **Top Of Mind Awareness (TOMA) through Marketing Communications**

The female respondents exhibited a higher level of brand awareness for the punch lines of oil marketing companies and their sub brands as compared to the male respondents. This finding can be used to target female customers with various value propositions with which they can identify.

All the oil marketing companies claim to be known for certain brand values which as of now are not strongly positioned in the customer's mind. Thus by establishing TOMA (Top Of Mind Association) through continuous reminders in the form of above the line marketing communications using

television as media, the company would be able to position distinct brand values amongst its customer segment.

The Preliminary research findings indicate that 69.23% of the respondents strongly agree to the statement that marketing communication activities helped in building brand recognition. Another 53.85% respondents strongly agree that such marketing communication activities result in the perception of a quality product.

In the wake of these revelations it would be appropriate to suggest interval schedule for integrated marketing communications. The companies should run their television ads whenever some promotional schemes are to be announced so that the customer segment from whom a particular action is expected is able to respond.

- **Effective use of OOH (Out of Home Media)**

The preliminary research conducted to understand the consumer awareness level of the out of home marketing communications involved showing the print outs of the hoardings displayed at the retail outlets of these companies. The brand name was covered and the respondents were asked to state the name of the oil marketing company. The majority of the respondents were unable to recall the company name upon seeing the print out of the hoarding.

The reason stated by the respondents for such a poor recall was that these hoarding are put up at the retail outlet and the customer does not have an inclination to comprehend what is being stated through these hoardings.

The OMCs should consider the placement of the hoardings at prominent places where the visibility is maximum. Hoardings can also be identified at a distance of 500 metres before the approach to the petroleum retail outlet.

- **E-Branding**

Companies today have taken up e-Branding to unleash potential of social networks.

For example the first place serious buyers go when shopping for a new car is internet which is easily accessible today from home, office, cyber cafes and mobile phones. Study carried out by J D Power and Associates reveals that 85% of the serious buyers visit the manufacturer's website before going to the dealer for a test drive.

The company websites is not visited by the customer as purchase of fuel for vehicle is a routine activity and thus falls in the category of low involvement product.

Oil marketing companies should have their presence through innovative games, contests etc. in the most visited websites and social networking sites where the customer would be prompted to click and learn more about the product or the contest. The OMCs can also have scrolls on the website displaying pollution levels of various cities and hence emphasise on the use of cleaner fuel with additives. The same can also be done through banners and pop ups on popular websites.

REINFORCE SUPERIOR BRAND QUALITY IMAGE

- **Market Segmentation**

Since it has come out very clearly from the research that the perception of the brand values is different for different income groups, gender, age groups, occupation and the types of vehicles used it is important for the OMCs to have a clear distinction of their target market based on the consumer behaviour and their consumption patterns of different income groups. Thus the task that needs to be accomplished is to carry out a demographic segmentation based on income and probe deeper into the unstated desires as regards to the fuel purchase by different segments of the society.

- **Establish Segment-wise Brand Positioning**

Each of the oil marketing company has some unique brand values (as exhibited in their official literature), for which they want to be known in the marketplace. These brand values are as follows:

- a) HPCL Brand Values- High Quality, Personalised Vehicle and Customer Care
- b) BPCL Brand Values- Innovation, Care and Reliability
- c) IOCL Brand Values- Care, Innovation, Passion and Trust.

The first task for the companies to be accomplished is to work towards identifying key attributes to be communicated so that they can start clearly differentiating themselves on the selected value/s. Only when the company clearly differentiates on the values offered, can it “engineer” the brand strategies into the marketing mix.

For example a particular brand value (say passion) may be well received and remembered by a particular target audience but another group of target market may find difficulty in relating with that value. If the company is able to make the consumer associate with reputation value along with the utilities of these fuels then it would automatically fall into the consideration set of such customer who would claim using expensive fuel with pride.

A word of caution here is that the companies should respect the fact that branding is broadly based on the concept of singularity. Hence OMCs need to identify and draw out plans to emphasis only on the key brand values to be communicated and positioned in the minds of the target customer. The brand values conveyed through marketing communication activities would become the discussion point and travel with a positive word of mouth as there would either be symbolism of status or utility associated with its use.

Thus the old retail truism of having the right product at the right place at the right time should now be positioned “for the right customer”.

- **Capability building of Sales Personnel**

During detailed discussions, the retailers revealed that the less preference for the branded fuel was that majority of customer saw no difference between the branded and unbranded fuel. Also the salespeople who dispense fuel do not hard sell the branded fuel as it may be perceived adversely by the customer.

Hence there is no distinct image in the mind of the customer for a branded fuel. Moreover besides the lack of knowledge about the beneficial properties of using high octane fuel with additives, there is no parallel motivation for the customer to consider the premium product. If the people deployed down the value chain are adequately trained they will resonate the brand value. Salespeople are considered as channels rather than creators of brand value. They convince clients and prospects of the value proposition with effective salesmanship. The marketing companies should design regular training/capability building programmes to make the Point of Sale (POS) personnel of retail outlets adept in their selling skills. It has been voiced out by the retailers that at present there is lack of such regular trainings and these personnel do a much mechanised job of dispensing fuel and billing the customer. With proper training they can smartly answer the queries of the customer related to branded fuel and build a unique identity of the product.

ESTABLISH CUSTOMER CONNECT WITH KEY BRAND VALUES

- **Brand Activation**

Brands connect with customers on an emotional level. Advertising has always been seen as main weapon to build brands by the brand managers. Excessive reliance on this form of communication has resulted in “over communication”. Marketers are therefore exploring new ways of supporting their brand. One such method is called Brand Activation which comes under the category of Below the Line activities.

Brand activation can be defined as marketing process of bringing a brand to life through creating brand experience. Generally, the core features or brand values of a brand are used for activation. That’s what every brand manager strives to achieve i.e. communicating their brand values to their target customers.

Although the benefits of Above the Line (ATL) marketing communication activities cannot be undermined but to begin with, the oil marketing companies need to interact with the customers to identify their stated and

unstated desires. This objective can be achieved through successful brand activation.

It is therefore very important for OMCs to have repeated frequent interactions with the customers through innovative means where the customer is able to foresee the advantages of premium fuel or patronising one OMC over other and thus overall have connect with the oil marketing company. Presently all OMCs are doing this brand activation at a very low key i.e. one- two activation in a financial year, whereas such brand activations are done on a weekly to fortnightly basis by international oil companies outside India. Such frequent interaction of international oil marketing companies with the customers has resulted in increased customer loyalty. Thus the OMCs should consider adopting a similar approach.

BUILD LOYALTY THROUGH CUSTOMER RELATIONSHIP MANAGEMENT

- **Innovative Loyalty card schemes**

The present boom in the organised retail in India and transition from mom and pop stores to supermarkets has attracted the Indian consumer where customer loyalty cards are issued free of cost just at the fill up of form at retail chains of Apparel, FMCG etc. The companies can learn from this and likewise at the filling up of form issue loyalty cards instantly. Also the requisite of preloading the card needs to be scrapped as the customers find it more of a hassle. The added benefits of using the loyalty cards for example discounts on purchase from certain retail outlets, eating joints and movie tickets needs to be communicated continuously through print media so that the customer is very clear of the benefits of having the card and their usage is maximised . The higher the number of people having the loyalty cards the better and more effective would be the customer relationship management by oil marketing companies since now the company can send personalised e-mails and SMS to their database of consumers. Customer Relationship Management can be used effectively as a communication platform with the consumers and keep them interested in the company through announcements of various schemes and

sales promotions designed.

- **Instant reward schemes**

Some scheme of instant rewards (not in the form of points but assured gifts) should be devised and implement on a monthly basis to attract the customer. For instance upon refuelling to full tank capacity some reward can be announced which would create a buzz amongst the customers . Introduce giveaways in the form of key rings, car perfumes, small gifts to consumers for patronising the company. The giveaways should have the promotional branding for increasing brand awareness and recall.

- **Personalised Consumer Purchase Experience**

As no business today is devoid of a service element, Oil Marketing companies can hugely benefit by improving and continuously tracking their service standards. Inconsistent service levels at different retail outlets of the same OMC has resulted in poor brand image. The OMCs need to make service the key differentiator & follow a consistent professional approach to deliver uniformity in service. This would help them reassess their brand building activities as far as service components are concerned and a corrective action can be initiated. Though convenience store is a successful model in the west, it has been seen that many convenience stores in India have been forced to shut down because of low footfalls of customers to purchase non fuel products like cold drinks, cookies, chips etc. When the retail outlet owners who have shut down their convenience stores in the last two years were asked for the reason for the same through in depth interviews they attributed this to the lack of parking space for the vehicles which deters the customers to venture out in the convenience stores.

In the wake of this scenario, the marketing companies need to rethink their non-fuel retailing strategy. The advent of free home delivery of groceries, FMCG products and food items has a background of strong need of these retail outlets to become the most preferred choice of the customers. To achieve this, these retailers increased the convenience level offered to the customer and

helped accomplishing customer relationship management. Thus their lookout was “If the customer is unwilling to venture out for purchases we will reach out to the customer”.

Thus if oil marketing companies want to increase their profit margins they need to overhaul their convenience stores and think of innovative ways of reaching out to the customers and enhance the customer purchase experience. One option is to create shelf space in the canopies of the retail outlets. There is always time available with the customer while he is waiting in queue to re-fuel his vehicle. If he can purchase the non-fuel products from the comfort of not leaving his vehicle, it will increase consumer purchase experience.

- **Deployment of PDCA Cycle to monitor brand building initiatives**

Insights from discussions with company officials revealed that on-going customer research is not conducted by oil marketing companies and the work of these officials revolve around identifying new locations for setting up of petrol stations, doing the viability test and accomplishing various compliance related tasks to commission these petrol stations. Besides this, they are also quite busy with the day to day sales tracking, doing supply chain management to ensure smooth and hassle free availability of the product and attending to any grievances of the channel partners. Identifying the prevailing brand perceptions through analysis of VOC (Voice of Customer) and providing inputs to the marketing team so that effective brand building measures could be deployed is not an area where they focus their attention. It is very important for companies to have a good understanding of the prevailing brand culture. The PDCA cycle (Plan Do Check and Act) needs to be effectively deployed and rigorously monitored as part of the daily management process. This would give an insight into the prevailing perceptions in the form of brand culture (brand stories, images, associations etc.) in the customer’s mind and also help in identifying redundant and ineffective activities.

LIST OF ABBREVIATIONS

Abbreviation	Expanded Form
HPCL	: Hindustan Petroleum Corporation Limited
BPCL	: Bharat Petroleum Corporation Limited
IOCL	: Indian Oil Corporation Limited
PSU	: Public Sector Units
OMCs	: Oil Marketing Companies
SIAM	: Society of Indian Automobile Manufacturers
MDRA	: Marketing and Development Research Associates
MIT	: Michigan Institute of Technology
BBDO	: Batten, Barton, Durstine & Osborn (Ad. Agency)
PCDL model of	: Positioning, Communicating, Delivering and
Brand equity	Leveraging Brand Equity
POP	: Points of Parity
POD	: Points of Difference
n.d.	: Not Dated
B2B	: Business to Business
CBBE	: Customer Based Brand Equity
FMCG	: Fast Moving Consumer Goods
BCM	: Brand Concept Map
BRM	: Brand Relationship Management
IBP	: Indo Burmah Petrol
CMIE	: Centre For Monitoring Indian Economy

Abbreviation	Expanded Form
GDP	: Gross Domestic Product
MoPNG	: Ministry of Petroleum and Natural Gas
CNG	: Compressed Natural Gas
USP	: Unique Selling Proposition
LIG	: Low Income Group
SPSS	: Statistical Package for Social Sciences
KSK	: Kisan Seva Kendras
SKO	: Superior Kerosene Oil
LDO	: Light Diesel Oil
C-Stores	: Convenience stores
TFL	: Tata Finance Limited
MIS	: Marketing Information System
BTL	: Below The Line
BP	: British Petroleum
NPN	: National Petroleum News
NOP	: National Opinion Poll
TOMA	: Top of Mind Awareness
OOH	: Out of Home
E-Branding	: Electronic Branding using Internet
POS	: Point of Sale
ATL	: Above the Line
PDCA Cycle	: Plan, Do, Check, Act
VOC	: Voice of Customer

LIST OF EXHIBITS

Exhibit No.	Content	Page No.
Exhibit 1.1	Customer Based Brand Equity Framework	8
Exhibit 2.1	Customer Based Brand Equity Pyramid	35
Exhibit 2.2	Sub Dimensions of Brand Building Blocks	44
Exhibit 2.3	Tata Tiscon	62
Exhibit 3.1	The Awareness Continuum & Brand Equity	76
Exhibit 4.1(a)	Urban Retail Outlets of IOCL	84
Exhibit 4.1(b)	Rural Retail Outlets of IOCL	85
Exhibit 4.2	Loyalty Cards of IOCL	86
Exhibit 4.3	Indian Oil on Indiatimes.com	87
Exhibit 4.4	Winners of “Car in a Tank” Offer	88
Exhibit 4.5	Loyalty Cards of BPCL	89
Exhibit 4.6	Bharat Petroleum on Indiatimes.com	91
Exhibit 4.7	Pure for Sure Campaign of BPCL	91
Exhibit 4.8	Bharo Petrol Chalo London	92
Exhibit 4.9	Loyalty Cards of HPCL	94
Exhibit 4.10	HP Happy Wheels Offer	97
Exhibit 5.1	Increase in Brand Equity of British Petroleum	109
Exhibit 6.1	Marketing Communications of International OMCs	131
Exhibit 7.1	Company wise Brand awareness of Customers	151
Exhibit 7.2	Loyalty Exhibited Towards OMCs	187
Exhibit 8.1	PDCA Cycle	225

LIST OF TABLES

Table No.	Content	Page No.
Table 1.1	Market Share of Oil Marketing Companies	10
Table 1.2	Automobile Domestic Sales Trends	11
Table 1.3	Consumption of Petroleum in India	11
Table 1.4	Forecast of Fuel Consumption in India	12
Table 2.1	Empirical Studies on the Effects of advertising Creativity in Persuasion Context	53
Table 3.1	Consumption of Petrol and Diesel in Madhya Pradesh	71
Table 3.2	Average monthly Expenditure on Petrol per Household	71
Table 3.3	State wise Percentage Contribution to Country's GDP	72
Table 3.4	State wise and Company wise Retail Outlets	73
Table 3.5	Vehicle Population: Madhya Pradesh	73
Table 4.1	Loyalty Cards of PSU Oil Marketing Companies	98
Table 4.2	Brand Building Initiatives of PSU Oil Marketing Companies	98
Table 4.3	Branded Petrol, Diesel & Lubricants of OMCs	98
Table 4.4	Promotional campaigns of Oil Marketing Companies	99
Table 6.1	Petrol & Diesel brands of Public Sector Oil Marketing Companies in India	122

Table No.	Content	Page No.
Table 6.2	Petrol Brands of International Oil Marketing Companies	123
Table 6.3	Diesel Brands of International Oil Marketing Companies	124
Table 6.4	Loyalty cards of PSU OMCs in India	125
Table 6.5	Loyalty Cards Issued by Shell	126
Table 6.6	Loyalty Cards Issued by British Petroleum	127
Table 6.7	Loyalty Cards Issued by Esso	128
Table 6.8	Brand Promise Campaigns by PSU OMCs	129
Table 6.9	Promotional Campaigns by PSU OMCs	130
Table 7.1	Correlation Between the Constructs of Research	136
Table 7.2	Top of the Mind Brand Awareness for PSU OMCs	137
Table 7.3	Variance for Income-wise Brand Awareness of OMCs	138
Table 7.4	Difference in Income-wise Brand Awareness of OMCs	139
Table 7.5	Awareness of the Tag Lines of OMCs	139
Table 7.6	Company-wise Linkage of Tag Lines	140
Table 7.7	Awareness of Petrol Brands of OMCs	141
Table 7.8	Company-wise Linkage of Petrol Brands	141
Table 7.9	Awareness of Convenience Stores of OMCs	141
Table 7.10	Company-wise Linkage of Convenience Stores	142
Table 7.11	Awareness of Promotional Campaigns of OMCs	142
Table 7.12	Company-wise Linkage of Promotional Campaigns	142

Table No.	Content	Page No.
Table 7.13	Awareness of Loyalty Cards of OMCs	143
Table 7.14	Company-wise Linkage of Loyalty Cards	143
Table 7.15	Awareness of OMCs based on Income of Respondents	144
Table 7.16	Awareness of Tag Lines Based on Type of Vehicle Used by Respondents	145
Table 7.17	Awareness of Petrol Brands Based on Type of Vehicle Used by Respondents	146
Table 7.18	Awareness of Convenience Stores Based on Type of Vehicle Used by Respondents	146
Table 7.19	Awareness of Promotion Campaigns Based on Type of Vehicle Used by Respondents	147
Table 7.20	Awareness of Loyalty Cards Based on Type of Vehicle Used by Respondents	147
Table 7.21	Awareness Level of Respondents Based on their Occupation	148
Table 7.22	Awareness Level of Respondents Based on their Gender	149
Table 7.23	Awareness Level of Respondents Based on their Age Groups	150
Table 7.24	Company-wise Brand Awareness Exhibited by Respondents	151
Table 7.25	Analysis of Variance for Perceived Quality of Fuel	152
Table 7.26	Perceived Quality of HPCL Fuels by Different Income Groups	153

Table No.	Content	Page No.
Table 7.27	Perceived Quality of BPCL Fuels by Different Income Groups	153
Table 7.28	Perceived Quality of Petrol from IOCL by Different Income Groups	153
Table 7.29	Perceived Quality of Petrol from HPCL Based on the Type of Vehicle Used	154
Table 7.30	Perceived Quality of Petrol from BPCL Based on the Type of Vehicle Used	154
Table 7.31	Perceived Quality of Petrol from IOCL Based on the Type of Vehicle Used	155
Table 7.32	Gender-wise Perceived Quality of Petrol from HPCL	155
Table 7.33	Gender-wise Perceived Quality of Petrol from BPCL	155
Table 7.34	Gender-wise Perceived Quality of Petrol from IOCL	155
Table 7.35	Occupation-wise Perceived Quality of petrol from HPCL	156
Table 7.36	Occupation-wise Perceived Quality of Petrol from BPCL	156
Table 7.37	Occupation-wise Perceived Quality of Petrol from IOCL	157
Table 7.38	Age-wise Perceived Quality of Petrol from HPCL	157
Table 7.39	Age-wise Perceived Quality of Petrol from BPCL	157
Table 7.40	Age-wise Perceived Quality of Petrol from IOCL	158

Table No.	Content	Page No.
Table 7.41	Perceived Quality of Non-Fuel Facilities at HPCL Outlets	158
Table 7.42	Perceived Quality of Non-Fuel Facilities at BPCL Outlets	159
Table 7.43	Perceived Quality of Non-fuel Facilities at IOCL Outlets	159
Table 7.44	Perceived Quality of Petrol from OMCs by the Respondents	160
Table 7.45	Weighted Perceived Quality Scores of OMCs	160
Table 7.46	Analysis of Variance for Association with Brand Values	162
Table 7.47	Income-wise Difference in Association of “High Quality” Brand Value with HPCL	163
Table 7.48	Income-wise Difference in Association of “Vehicle Care” brand Value with HPCL	163
Table 7.49	Income-wise Difference in Association of “Customer Care” Brand Value with HPCL	164
Table 7.50	Income-wise Difference in Association of “Innovation” Brand Value with BPCL	164
Table 7.51	Income-wise Difference in Association of “Care” Brand Value with BPCL	165
Table 7.52	Income-wise Difference in Association of “Reliable” Brand Value with BPCL	165
Table 7.53	Income-wise Difference in Association of “Care” Brand Value with IOCL	166

Table No.	Content	Page No.
Table 7.54	Income-wise Difference in Association of “Innovation” Brand Value with IOCL	166
Table 7.55	Income-wise Difference in Association of “Passion” Brand Value with IOCL	167
Table 7.56	Income-wise Difference in Association of “Trust Brand Value with IOCL	167
Table 7.57	Agreement of Respondents with Brand Values of OMCs	168
Table 7.58	Income-wise Brand Association with HPCL	169
Table 7.59	Income-wise Brand Association with BPCL	170
Table 7.60	Income-wise Brand Association with IOCL	171
Table 7.61	Gender-wise Association of Brand Values with HPCL	172
Table 7.62	Gender-wise Association of Brand Values with BPCL	173
Table 7.63	Gender-wise Association of Brand Values with IOCL	174
Table 7.64	Association of Brand Values with HPCL Based on Type of Vehicle Used	175
Table 7.65	Association of Brand Values with BPCL Based on Type of Vehicle Used	176
Table 7.66	Association of Brand Values with IOCL Based on Type of Vehicle Used	177
Table 7.67	Occupation-wise Brand Association with HPCL	178
Table 7.68	Occupation-wise Brand Association with BPCL	179
Table 7.69	Occupation-wise Brand Association with IOCL	180

Table No.	Content	Page No.
Table 7.70	Age-wise Brand Association with HPCL	181
Table 7.71	Age-wise Brand Association with BPCL	182
Table 7.72	Age-wise Brand Association with IOCL	183
Table 7.73	Weighted Average Score for Association of Brand Values with HPCL	184
Table 7.74	Weighted Average Score for Association of Brand Values with BPCL	185
Table 7.75	Weighted Average Score for Association of Brand Values with IOCL	185
Table 7.76	Loyalty Exhibited Towards OMCs	187
Table 7.77	Analysis of Variance for Brand Loyalty Exhibited for OMCs	188
Table 7.78	Income-wise Difference in Loyalty for HPCL	189
Table 7.79	Income-wise Difference in Loyalty for BPCL	189
Table 7.80	Income-wise Difference in Loyalty for IOCL	189
Table 7.81	Income-wise Brand Loyalty Exhibited for OMCs	190
Table 7.82	Gender-wise Brand Loyalty Exhibited for OMCs	191
Table 7.83	Brand Loyalty Exhibited Based on Type of Vehicle Used	192
Table 7.84	Occupation-wise Brand Loyalty Exhibited for OMCs	193
Table 7.85	Age-wise Brand Loyalty Exhibited for OMCs	194
Table 7.86	Weighted Loyalty Scores for the OMCs	195
Table 8.1	Income-wise Highest Awareness Level of Respondents	201

Table No.	Content	Page No.
Table 8.2	Highest Awareness Based on Vehicle used by Respondents	202
Table 8.3	Occupation-wise Highest Awareness Level of Respondents	203
Table 8.4	Gender-wise Highest Awareness Level of Respondents	204
Table 8.5	Age-wise Highest Awareness Level of Respondents	205
Table 8.6	Income-wise Good Quality Perception for Petrol Marketed by OMCs	206
Table 8.7	Good Quality Perception for Petrol Marketed by OMCs Based on Type if Vehicle Used	206
Table 8.8	Gender-wise Good Quality Perception for Petrol Marketed by OMCs	207
Table 8.9	Occupation-wise Good Quality Perception for Petrol Marketed by OMCs	207
Table 8.10	Age-wise Good Quality Perception for Petrol Marketed by OMCs	208
Table 8.11	Highest Agreement with the Brand Values of OMCs Based on Income Groups	209
Table 8.12	Highest Agreement with the Brand Values of OMCs Based on Gender of Respondents	210
Table 8.13	Highest Agreement with the Brand Values of OMCs Based on Type of Vehicle Used	211
Table 8.14	Highest Agreement with the Brand Values of OMCs Based on Occupation of Respondents	212

Table No.	Content	Page No.
Table 8.15	Highest Agreement with the Brand Values of OMCs Based on Age of Respondents	212
Table 8.16	Highest Loyalty Exhibited for OMCs Based on Income Groups	213
Table 8.17	Highest Loyalty Exhibited for OMCs Based on Type of Vehicle Used	214
Table 8.18	Highest Loyalty Exhibited for OMCs Based on Gender	214
Table 8.19	Highest Loyalty Exhibited for OMCs Based on Occupation	214
Table 8.20	Highest Loyalty Exhibited for OMCs Based on Age of Respondents	215
Table 8.21	Customer Based Brand Equity of OMCs	215
Table 9.1	Company-wise Brand Awareness Exhibited by Respondents	234
Table 9.2	Weighted Perceived Quality Scores of OMCs	235
Table 9.3	Weighted Average Score for Association of Brand Values with HPCL	236
Table 9.4	Weighted Average Score for Association of Brand Values with BPCL	236
Table 9.5	Weighted Average Score for Association of Brand Values with IOCL	237
Table 9.6	Weighted Loyalty Scores for the OMCs	238

APPENDIX 1

A Study of Customer Based Brand Equity for Public Sector OMCs with Special Reference to the City of Indore

Kindly furnish the following information about yourself:

Q1) Name----- 2) Age-----

Q3) Gender (Kindly tick)

- i. Male ii Female

Q4) Location of residence (Kindly tick)

- i. In/Around Palasia iii. In/Around Vijaynagar
ii. In/Around Geeta Bhavan iv. In/Around LIG Colony

Q5) Occupation: (Kindly Tick)

- i. Service ii Business iii Housewife iv
Student

Q6) Family's monthly income

- i. Less than 50,000 pm. ii. Between 50,000 to 1,00,000 pm
iii. More than 1,00,000 pm

Q7) Kindly tick mark against the type of vehicle owned and name the vehicle:

S.No	Type of Vehicle	Name of Vehicle Brand	No. of vehicles owned	Fuel used (Please tick)
1	2 wheeler			Petrol/Diesel
2	4 wheeler			Petrol/ Diesel

Q8): Petrol is sold by which company-----

Q9) What do you feel about the quality of petrol of these companies

S.No	Company	Superior	Good	Can't Say	Bad	Worst
1	HPCL					
2	BPCL					
3	IOCL					

Q10) What is your experience about the quality of the non-fuel facilities offered at HPCL petrol pumps.

S.No	Non-Fuel Facility	Superior	Good	Can't Say	Bad	Worst
1	Air Filling					
2	Drinking Water					
3	Wash Room					
4	Tyre Change					
5	Convenience Store					
6	Oil Change					
7	Service of sales personnel					
8	Others (Like ATM, florist, eating joint etc.)					

Q11) What is your experience about the quality of the non-fuel facilities offered at BPCL petrol pumps.

S.No	Non-Fuel Facility	Superior	Good	Can'tSay	Bad	Worst
1	Air Filling					
2	Drinking Water					
3	Wash Room					
4	Tyre Change					
5	Convenience Store					
6	Oil Change					
7	Service of sales personnel					
8	Others (Like ATM, florist, eating joint etc.)					

Q12) What is your experience about the quality of the non-fuel facilities offered at IOCL petrol pumps.

S.No	Non-Fuel Facility	Superior	Good	Can't Say	Bad	Worst
1	Air Filling					
2	Drinking Water					
3	Wash Room					
4	Tyre Change					
5	Convenience Store					
6	Oil Change					
7	Service of sales personnel					
8	Others (Like ATM, florist, eating joint etc.)					

Q13) What is your purchase pattern for petrol from these companies.

S.No.	Company	Only Purchase from this Company	Mostly Purchase from this Company	Can't Say	Rarely purchase from this Company	Never purchase from this Company
1	HPCL					
2	BPCL					
3	IOCL					

Q14) I visit this petrol station because:

a)-----

b)-----

Q15) If in a particular location there are multiple petrol stations I will go to:
(Kindly tick mark one)

HPCL/BPCL/IOCL

Q16) Identify the company with the following tag line

S.No	Tag Line	Company Name	S.No	Tag Line	Company Name
1	Bringing energy to life		5	Pure Bhi Poora Bhi	
2	Club HP		6	High Performance Petrol	
3	Pure for Sure		7	Achcha Lagta Hai	
4	Go out and Play				

Q17) Kindly tick against the appropriate column to show your level of agreement with the brand values of the companies.

S.No.	Brand Value (Company name)	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1	High Quality (HPCL)					
2	Personalised Vehicle care (HPCL)					
3	Personalised Customer care (HPCL)					
4	Innovation (BPCL)					
5	Care (BPCL)					
6	Reliability (BPCL)					
7	Care (IOCL)					
8	Innovation (IOCL)					
9	Passion (IOCL)					
10	Trust (IOCL)					

Q18) Kindly put a tick mark to identify the oil company for the product or initiative mentioned

S.No	PRODUCT/INITIATIVE	NAME OF THE COMPANY (Kidly tick the answer from the options)
1	Petrocard	HPCL/BPCL/IOCL/No idea
2	Speed	HPCL/BPCL/IOCL/No idea
3	XtraPremium	HPCL/BPCL/IOCL/No idea
4	Power	HPCL/BPCL/IOCL/No idea
5	Xtracare	HPCL/BPCL/IOCL/No idea
6	i-mint card	HPCL/BPCL/IOCL/No idea
7	Xtrarewards card	HPCL/BPCL/IOCL/No idea
8	In &Out	HPCL/BPCL/IOCL/No idea
9	Care	HPCL/BPCL/IOCL/No idea
10	Speedmart	HPCL/BPCL/IOCL/No idea
11	Bhar Bhar Ke Jeeto	HPCL/BPCL/IOCL/No idea
12	Bharo Petrol Chalo London	HPCL/BPCL/IOCL/No idea
13	Saal Bhar Free Fuel	HPCL/BPCL/IOCL/No idea

APPENDIX 2: PRELIMINARY STUDY

A Study of Brand Building Activities Followed By Fuel Marketing Companies
(Questionnaire for Dealers)

Q1: Please tick mark against the company whose dealership you have

- a) HPCL b) BPCL c) IOCL d) Other (Please specify)-----

Q2: Kindly indicate (tick mark) the location of your retail outlet

- a) Within the City b) On the Highway

Q3: Which type of fuel do the consumers use the most? (Please tick)

- a) Branded
b) Unbranded (Normal)

Q4: How many people (out of 100) go for branded fuel? (please tick)

- a) 10-30 c) 61-90
b) 31-60 d) Above 90

Q5: Which category of users use branded fuel more

- a) 2-wheeler owners b) 4 wheeler owners
c) Can't say

Q6: Kindly rate the media used by your company most often for advertisement/ promotional activities?(**Rate 1 for most preferred and 8 for least preferred**)

- | | |
|---|--|
| a) Newspapers <input type="checkbox"/> | e) TV <input type="checkbox"/> |
| b) Radio <input type="checkbox"/> | f) Magazines <input type="checkbox"/> |
| c) Hoardings (in the city) <input type="checkbox"/> | g) Wall Paintings <input type="checkbox"/> |
| d) Hoardings (at retail outlets) <input type="checkbox"/> | h) Internet <input type="checkbox"/> |

Q7: What type of activities other than advertisements through various media does your company do for brand building? (**You can tick more than one**)

- a) Coupons c) Loyalty Cards
b) Discount offer d) Promotional Schemes

Q8: Kindly rate the type of payment mode used by customers? **(rate 1 for most preferred & 4 for least preferred)**

- a) Cheque c) Credit Card
 b) Cash d) Debit Card

Q9: Kindly tick against the appropriate column to show your level of agreement with the brand values of the companies.

S.No.	Brand Value (Company name)	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1	High Quality (HPCL)					
2	Personalised Vehicle care (HPCL)					
3	Personalised Customer care (HPCL)					
4	Innovation (BPCL)					
5	Care (BPCL)					
6	Reliability (BPCL)					
7	Care (IOCL)					
8	Innovation (IOCL)					
9	Passion (IOCL)					
10	Trust (IOCL)					

Q10: Identify the company with the following tag line

S.No	Tag Line	Company Name	S.No	Tag Line	Company Name
1	Bringing energy to life		5	Pure Bhi Poora Bhi	
2	Club -----		6	High Performance Petrol	
3	Pure for Sure		7	Achcha Lagta Hai	
4	Go out and Play				

Q11: Kindly rate the non-fuel facilities according to the usage rate by the customers? (Rate 1 for most used and 7 for least used)

- | | | | |
|----------------------|--------------------------|----------------|--------------------------|
| a) ATM | <input type="checkbox"/> | e) Wash room | <input type="checkbox"/> |
| b) Air filling | <input type="checkbox"/> | f) Florist | <input type="checkbox"/> |
| c) Drinking water | <input type="checkbox"/> | g) Tyre Change | <input type="checkbox"/> |
| d) Convenience store | <input type="checkbox"/> | h) Oil Change | <input type="checkbox"/> |

Q12: Kindly put a tick mark to identify the oil company for the product or initiative mentioned

S.No	PRODUCT/INITIATIVE	NAME OF THE COMPANY (Kidly tick the answer from the options)
1	Petrocard	HPCL/BPCL/IOCL/No idea
2	Speed	HPCL/BPCL/IOCL/No idea
3	XtraPremium	HPCL/BPCL/IOCL/No idea
4	Power	HPCL/BPCL/IOCL/No idea
5	Xtracare	HPCL/BPCL/IOCL/No idea
6	i-mint card	HPCL/BPCL/IOCL/No idea
7	Xtrarewards card	HPCL/BPCL/IOCL/No idea
8	In &Out	HPCL/BPCL/IOCL/No idea
9	Care	HPCL/BPCL/IOCL/No idea
10	Speedmart	HPCL/BPCL/IOCL/No idea
11	Bhar Bhar Ke Jeeto	HPCL/BPCL/IOCL/No idea
12	Bharo Petrol Chalo London	HPCL/BPCL/IOCL/No idea
13	Saal Bhar Free Fuel	HPCL/BPCL/IOCL/No idea

Q13: Who according to you will have more impact through advertisements on customers to purchase costly premium products?

- a) Film Stars d) Children
 b) Cricketers / Sportsperson e) Any other (Please specify).....
 c) A normal family

Q14: Rate the following advantages of using branded fuel on a scale of 1 to 6

(Rate 1 for most advantageous & 6 for least advantageous)

FACTORS	RANK
Mileage	
Reduction of emission levels	
Easy starting	
Low maintenance cost	
Power	
Acceleration/Speed	

Q15: How many individuals out of 100 have you issued Loyalty cards (kindly tick)

- a) 0-20 b) 21-40 c) 41-60 d) 61-80
 e) 81-100

Q16: How many fleet owners out of 50 have you issued Loyalty cards (kindly tick)

- a) 0-10 b) 11-20 c) 21-30 d) 31-40
 e) 41-50

Q17: Kindly tick the category of users who use the loyalty cards most

- a) Individual Users b) Transporters/ fleet owners

Q18: Kindly state the reason for your above answer

Q19: What happen to the sales of fuel when company runs some offers/promotional activities?

- a) Sale increases sharply
- b) Sale remains same
- c) Sale increase marginally

Q20: How frequently are promotional activities run by your company?

- a) Every month
- b) Once in a quarter
- c) Half yearly
- d) Once a year

Q21: Kindly put a tick mark against the promotional activities done at your retail outlet :

- a) “Bhar Bhar Ke Jeeto”
- b) “Mak Scratch Dhamaka”
- c) “Saal Bhar Free Fuel”
- d) “Bharo Petrol Chaloo London”
- e) “Servo 4T car in a Can”
- f) Any other (Please specify)

APPENDIX 3: PRELIMINARY STUDY

A Study of Customer Based Brand Equity for Public Sector OMCs
(Questionnaire for Customers)

Q1: Which type of fuel do you use the most? (Please tick)

- a) Branded (like Speed , Power, Xtrapremium etc.)
- b) Unbranded (Normal)

Q2: Kindly tick mark against the media where you see the advertisement/
promotional announcements of oil companies?(You can tick more than one
option)

- a) Newspapers e) TV
- b) Radio f) Magazines
- c) Hoardings (in the city) g) Wall Paintings
- d) Hoardings (at retail outlets) h) Internet

Q3: What type of activities by petroleum companies other than
advertisements have you experienced?

- a) Coupons c) Loyalty Cards
- b) Discount offer d) None

Q4: Identify the company with the following tag line

S.No	Tag Line	Company Name	S.No	Tag Line	Company Name
1	Bringing energy to life		5	Pure Bhi Poora Bhi	
2	Club -----		6	High Performance Petrol	
3	Pure for Sure		7	Achcha Lagta Hai	
4	Go out and Play				

Q5: Promotional activity reflects the following image of branded fuel: (Kindly tick in the appropriate column)

S.No	Image Perception	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree
1	Costly Product					
2	Company tries to push sales					
3	Association with a quality Product					
4	Product offers value for money					
5	Promotional activities are waste of Money					
6	Reflects and reinforces the brand promise					
7	Builds brand recognition					
8	Helps improve sales					

Q6: Kindly rate the non-fuel facilities used by you at a petrol station? (Rate 1 for most used and 7 for least used)

- | | | | |
|----------------------|--------------------------|----------------|--------------------------|
| a) ATM | <input type="checkbox"/> | e) Wash room | <input type="checkbox"/> |
| b) Air filling | <input type="checkbox"/> | f) Florist | <input type="checkbox"/> |
| c) Drinking water | <input type="checkbox"/> | g) Tyre Change | <input type="checkbox"/> |
| d) Convenience store | <input type="checkbox"/> | | |

Q7: Who according to you will have more impact through advertisements to purchase oil products?

- | | | | |
|------------------------------|--------------------------|------------------------------------|--------------------------|
| a) Film Stars | <input type="checkbox"/> | d) Children | <input type="checkbox"/> |
| b) Cricketers / Sportsperson | <input type="checkbox"/> | e) Any other (Please specify)..... | |
| c) A normal family | <input type="checkbox"/> | | |

Q8: Rate the following advantages of using branded fuel on a scale of 1 to 6 (1 for most advantageous & 6 for least advantageous)

FACTORS	RANK
Mileage	
Reduction of emission levels	
Easy starting	
Low maintenance cost	
Power	
Acceleration/Speed	

Q9: Kindly put a tick mark to identify the oil company for the product or initiative mentioned

S.No	PRODUCT/INITIATIVE	NAME OF THE COMPANY (Kidly tick the answer from the options)
1	Petrocard	HPCL/BPCL/IOCL/No idea
2	Speed	HPCL/BPCL/IOCL/No idea
3	XtraPremium	HPCL/BPCL/IOCL/No idea
4	Power	HPCL/BPCL/IOCL/No idea
5	Xtracare	HPCL/BPCL/IOCL/No idea
6	i-mint card	HPCL/BPCL/IOCL/No idea
7	Xtrarewards card	HPCL/BPCL/IOCL/No idea
8	In &Out	HPCL/BPCL/IOCL/No idea
9	Care	HPCL/BPCL/IOCL/No idea
10	Speedmart	HPCL/BPCL/IOCL/No idea
11	Bhar Bhar Ke Jeeto	HPCL/BPCL/IOCL/No idea
12	Bharo Petrol Chalo London	HPCL/BPCL/IOCL/No idea
13	Saal Bhar Free Fuel	HPCL/BPCL/IOCL/No idea

Q10: Do you own the Loyalty cards of a petrol company (kindly tick)

- a) Yes b) No

Q11: If Yes kindly mention the name of the card-----

Q12: If No kindly tick against the most appropriate reason

- a) Unaware of such cards
b) Never felt the need
c) Do not see any benefit of having such cards

Q13: Kindly put a tick mark against the promotional activities which you have heard of :

- | | |
|---|---|
| a) Bhar Bhar Ke Jeeto <input type="checkbox"/> | d) Bharo Petrol Chalo London <input type="checkbox"/> |
| b) Mak Scratch Dhamaka <input type="checkbox"/> | e) Servo 4T car in a Can <input type="checkbox"/> |
| c) Saal Bhar Free Fuel <input type="checkbox"/> | f) Any other (Please specify)----- |

**LIST OF PETROLEUM RETAIL OUTLETS SURVEYED
DURING PRELIMINARY STUDY**

S.No.	Outlet/Owner's Name	Company	Address	Contact
1	Arjun Baroda	BPCL	NH-3, Arjunbaroda village, Indore	0731- 2805060
2	Farhan Khan	BPCL	Ujjain Indore Bypass Road	9827201883
3	Bharat Petroleum	BPCL	Nanakheda Petrol Pump	Not available
4	Narayan Das Shyamsunder	BPCL	Palasia, Indore	Not available
5	Taj Service Station	BPCL	Sultania Road, Bhopal	0755- 2540488
6	Ibrahim Ali- Imdad Ali	BPCL	Sultania Road, Bhopal	9827054019
7	Highway Service	BPCL	Mhow Neemuch Road	Not Available
8	G.Das & Brothers	BPCL	Near Railway Station	Not available
9	Filmore Service Station	BPCL	Link Road-1, Near New Market	0755- 551893
10	Quantum Urja Pvt.Ltd.	BPCL	401, Sapphire House, Sapna Sangeeta Road, Indore	0731- 2366586
11	Bharat Petroleum Corporation Limited	BPCL	112/1, Hukmarkhedi, A.B Road,Indore	0731- 4092555

S.No.	Outlet/Owner's Name	Company	Address	Contact
12	Auto Spirit	BPCL	7, Manormaganj , Indore, M.P.	0731- 5064072
13	B.M. Modi & Sons	BPCL	6, RNT Marg Indore, M.P.	0731- 2525101
14	G. B. Sales Corporation	BPCL	14, Jawahar Marg, Indore, M.P.	0731- 2466681
15	Khalsa Auto Service	BPCL	A B Road, Opposite Emerald Heights School, Rau, Indore	0731- 5083067
16	Gati Corporation Limited	BPCL	A B Road, Dewas Naka, Indore	0731- 5021171
17	J. J. Sharma & Company	BPCL	16/6, Choti Gwaltoli, Indore	0731- 2706286
18	Vivek Agencies	BPCL	16/104, Bansi Trade Centre,Indore	0731- 2531707
19	Raghunath Prasad & Co.	BPCL	Opposite Orbit Mall, Scheme54, Indore	Not available
20	A.C. Agarwal &Co.	HPCL	AB Road, Indore	Not available
21	Aamir Auto Service	HPCL	Kibe Compound, Indore	0731- 465312
22	All India Trading Company	HPCL	Aerodrum Road, Indore	0731- 411684
23	Ashok Petrol Pump	HPCL	41, Tukoganj , Indore	0731- 541757
24	Auto Guide Service Station	HPCL	A B Road, Mahow,Indore	0731- 8376205

S.No.	Outlet/Owner's Name	Company	Address	Contact
25	Central India Motors	HPCL	19/1, A B Road, Indore	0731-490447
26	Laxmi Service Station	HPCL	Opposite GPO, Indore	0731-462886
27	Commercial Automobiles	HPCL	NH-7 Bypass	0761-518857
28	C.P. Shah	HPCL	Ujjain-Indore Road	0734-520051
29	Bari Auto Supply Company	HPCL	Mumbai- Agra Road	07532-24465
30	Dulichand Kamalkumar	HPCL	Indore-Bhopal Road	07582-35513
31	Malaviya Fuel Station	IOCL	15-C, Scheme 94, Ring Road, Indore	0731-2552222
32	Usharaj Fuels	IOCL	10-B, Scheme no. 31, Loha Mandi, Near Navlakha Complex, Indore	0731-2364364
33	Indian Oil Corporation Limited	IOCL	Police Lines, RAPTC, Airport Road	0731-2419131
34	Auto Spirit	IOCL	Manormaganj, A B Road, Indore	Not available
35	Bhawna Service Station	IOCL	Mhow City, AB Road, Indore	Not available
36	Fair Deal Marwar Garages	IOCL	Geeta Bhavan Circle, AB Road , Indore	0731-5077277
37	Daimond Garage	IOCL	Dewas Naka, Niranjapur, Indore	0731-5033224

S.No.	Outlet/Owner's Name	Company	Address	Contact
38	Kanhaiyalal & company	IOCL	Sanwer Road, Gram Bhonrasala, Indore	0731- 2422977
39	Mahesh Auto Sales and Service	IOCL	RNT Marg, Opposite University, Indore	0731- 2524037
40	Multhan Refill Junction	IOCL	Opposite Burwani Plaza, Old Palasia , Indore	0731- 2494138
41	Chamundamata Square Pump	IOCL	Vijaynagar, scheme54	Not available
42	Major Nankey & Company	IOCL	New Market	0755- 2550016
43	Baldwa Petrol Pump	IOCL	MYH Hospital road, Indore	Not available
44	K.S. Petroleum	IOCL	Sanver Road, Indore	0731- 4275765
45	Durga Petrol Pump	IOCL	Malviya Nagar	9826638875
46	Arera Petrol Pump	IOCL	Bittan Market, Bhopal	Not available
47	Prabha Service Centre	IOCL	PNT Square, Indore	0755- 4221671

LIST OF COMPANY OFFICIALS CONTACTED

S.No.	Company Officials contacted	Company
1	Mr. Puranjay Jadeja, Territory Manager Retail, Indore	BPCL
2	Mr. D.C. Patra, General Manager, Mumbai	BPCL
3	S.S. Patil, Senior Regional Manager, Govindpura, Gautam Nagar, Bhopal	HPCL
4	Mr. R.K Barik, Marketing Manager, Govindpura, Gautam Nagar, Bhopal	HPCL
5	Mr. Sailesh Samanth, General Manager, Madhya Pradesh State Office and State Level Coordinator, Bhopal	IOCL
6	Mr. Manoj Gawande, Systems Manager, Indore	IOCL

BIBLIOGRAPHY

- Acton, Maurice, (2007). “Fuel for Thought”, *Brand Strategy*, No. 211, pp. 54-55. *Business Source Premier*, EBSCO host (accessed August 11, 2010)
- Acton, Maurice, (2007). “Oil in the Middle East”, *Brand Strategy*, pp. 54-55.
- Anand, Punam, and Brian Sternthal (1990), “Ease of Message Processing as a Moderator of Repetition Effects in Advertising,” *Journal of Marketing Research*, Vol. 27, August Issue, pp.345–353.
- Angel, Abcede, (1995). “Can Majors Declare Success with Co-Branded Cards?”, *National Petroleum News*, Vol. 87, No.10, pp. 51, ABI/INFORM Global.
- Anonymous, (1993). “Shell’s Mastercard Deal Fuels Co-Branded Credit Frenzy”, *National Petroleum News*, Vol. 85, No. 12, pp. 44, ABI/INFORM Global.
- Anonymous, (2000). “History of Standard Oil Company and its Successors”, available at www.us-highways.com/sohist.htm
- Anonymous, (2001). “BP Opens First United States BP Connect Site”, *National Petroleum News*, Vol. 93, No. 3, pp. 8, ABI/INFORM Global.
- Anonymous, (2004). “BP Choses Sapient to Develop Global Internet Platform Solution to Enhance BP’s Brand Online and Result in Significant Cost Savings”, *Business Wire*, 6th December, 2004.
- Anonymous, (2007). “BP Takes Global Branding Role away from Marketing”, *Marketing Week*, pp. 3.
- Anonymous, (2008). “DFW American Marketing Association; Utilizing Experiential Marketing to Promote Your Brand”, *Business and Finance Week*, October 25th, pp. 112.

- Anonymous, (2008). “Finance and Economics: Crude Threat”, *The Economist*, Vol. 387, No. 8580, pp. 92.
- Appel, Valentine, and Milton L. Blum (1961). “Ad Recognition and Respondent Set,” *Journal of Advertising Research*, Vol. 1, June Issue, pp. 13–21.
- Arnold, Catherine, (2003). “Seek some Feedback before Rebranding”, *Marketing News*, Vol. 37, No. 23, pp. 5-6, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Arnold, Dan, (2010). “The Road to the Future”, *Retail Merchandiser*, pp. 80-81.
- Arthur, Cheng-Hsui, Chen, (2001). “Using Free Association to Examine the Relationship between the Characteristics of Brand Associations and Brand Equity”, *Journal of Product and Brand Management*, Vol. 10, No. 7, pp. 439-451.
- Batra, Rajeev, and Michael, Ray, (1986). “Situational Effects of Advertising Repetition: The Moderating Influence of Motivation, Ability, and Opportunity to Respond,” *Journal of Consumer Research*, Vol. 12, March Issue, pp. 432–445.
- Belch, George E., (1982). “The Effects of Television Commercial Repetition on Cognitive Response and Message Acceptance,” *Journal of Consumer Research*, Vol. 9, June Issue, pp. 56–65.
- Bendapudi, Neeli and Bendapudi, Venkat, (2005). “Creating the Living Brand”, *Harvard Business Review*, pp. 1-8, available at hbsp.harvard.edu/, accessed on March 3, 2009.
- Bennett, D., Ehrenberg A., & Goodhardt G., (2000). “Two Purchase Analysis of Brand Loyalty among Petrol Buyers”, ANZMAC 2000, Visionary Marketing for the 21st Century: Facing the Challenge.
- Bennett, Stephen, (2002). “Brand Update: Now that BP, Shell and Valero have Made their Moves, NPN Checked in to See How the Conversion Plans are Progressing”, *National Petroleum News*, pp.46-53.

- Berry L. Leonard et. al., 2006, “Creating New Markets Through Service Innovation”, *MIT Sloan Management Review*, Vol. 47, Issue 2, pp. 56-63.
- Berthon, Pierre, Hulbert, M. James, and Pitt, F. Leyland, (1999). “Brand Management Prognostications”, *Sloan Management Review*, Vol. 40, No. 2, pp. 53, ABI/INFORM Global.
- Bold, Ben, (2004). “BP to Leverage Nectar Data with LIDA Activity”, *Marketing*, 5th February, pp. 10.
- Briggs, Rex, and Nigel Hollis (1997). “Advertising on the Web: Is There Response Before Click-Through?” *Journal of Advertising Research*, Vol. 37, No. 2, pp. 33–45.
- Burke, Raymond R., and Thomas, K. Srull, (1988). “Competitive Interference and Consumer Memory for Advertising,” *Journal of Consumer Research*, Vol. 15, June Issue, pp. 55–66.
- Cahill J. Dennis, (1993). “Journal of Product and Brand Management: Meaning, Measure and Morality of Materialism”, *Marketing Intelligence and Planning*, Vol. 11, No. 6, pp. 20, ABI/INFORM Global.
- Christodoulides, G., & de Chernatony, L. (2010). “Consumer-Based Brand Equity Conceptualisation and Measurement”, *International Journal of Market Research*, Vol. 52, No.1, pp. 43-66.
- Citigroup/BP: Simplicity is Secret of Fuel Card Success, (2006). *Market Watch: Energy*, Vol.5, No. 10, pp. 17, Business Source Premier, EBSCOhost, accessed on 27 January 2011
- Datamonitor, (2007). “Shell’s unmanned Denmark Strategy Makes Sense”, *Market Watch, Energy*, pp. 17-18.
- Datamonitor, (2008). “Indian Oil Corporation Limited”, *Market Watch*, pp. 4-10.
- Datamonitor, November 2005, “Co-Branded Oil Credit Cards Reduce Card Promiscuity”, *Marketwatch, Global Roundup*, pp. 108-109.
- Datamonitor, November 2005, “Shell Credit Cards Crowned King of the Road”, *Market Watch: Financial Services*, pp.5-6.

- Datamonitor, October 2006, "Citigroup/BP: Simplicity is Secret of Fuel Card Success", *Market Watch, Energy*, pp. 17.
- David, Ralls, (2008). "10 Strategies to Build Market Share", *Lodging Hospitality*, Vol.64, No. 13, pp. 28-29. Retrieved January 23, 2009, from ABI/INFORM Global database.
- Dawar, Niraj, (2004). "What are Brands Good For?", *MIT Sloan Management Review*, Vol. 46, No. 1, pp. 31-37.
- Dawes, John, (2009). *International Journal of Market Research*, Vol. 51, No. 4, pp. 449-463.
- Eddy, Kester, (2000). "Fuelling New Demand", *Financial Times*, December 28, pp. 6.
- Eisingerich, B. Andreas, Rubera, Gaia, and Seifert, Matthias, (2009). "Managing Service Innovation and Interorganizational Relationships for Firm Performance: To Commit or Diversify?", *Journal of Service Research*, Vol. 11, No. 4, Sage Publications.
- Fevons, Colin, (2005). "Names, Brands, Branding: Beyond the Signs, Symbols, Products and Services", *Journal of Product and Brand Management*, Vol. 14, No. 2, pp. 117-118.
- Fitzgerald, Shelle, (2002). "Battling the Big Box Round 1", *Canadian Grocer*, Toronto, Vol. 116, No. 2, pp. G14.
- Fletcher, Sam, (2008). "Westwood: Big Oil needs new Business Model", *Oil and Gas Journal*, Vol. 106, No. 3, pp. 39, ABI/INFORM Global.
- Francella, and Barbara, Grondin, (2007). "The Big Oil Alternative", *Convenience Store News*, Vol.43, Issue 13, pp. 47-52. *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Gillmor Steve, (2001). "Standards Oil." *InfoWorld*, Vol.23, No. 44, pp. 78. *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Halliday, Jean, 1997, "Shell Oil to Spend \$30 mil on New Branding Effort", *Advertising Age*, Vol.68, No. 26, pp. 4, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.

- Hamblen, Matt, (2000). "Shell Protects Brand via Net", *Computerworld*, Vol.34, No. 2, pp. 39, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Heslin Kevin, (2007). "King Oil Lives", *Energy and Power Management*, Vol. 32, No. 5, pp. 4, ABI/INFORM Trade and Industry.
- Higgins, and Kevin, T., (2002) "Quick-Change Branding Strategy." *Marketing Management*, Vol. 11, No. 3, pp. 12-15. *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Hooley, G., & Greenley, G. (2005). "The Resource Underpinnings of Competitive Positions", *Journal of Strategic Marketing*, Vol. 13, No. 2, pp. 93-116.
- Hovanesian, Der Mara, (2008). "Good-Bye, Cheap Oil, So Long, Suburbia", *Business Week*, No. 4082, pp. 56.
- ICMR-Indian Council for Market Research, (2008). "Indian Petrol Industry-Towards Branded Fuel", available at icmrindia.org/casestudies
- Inkpen, Andrew, (2008). "The Oil and Gas Industry", *Harvard Business Review*, pp.1-22, available at hbsp.harvard.edu/, accessed on 5th February, 2011.
- Jackson, Mahr, (2006). "BP Energetic", *Brand Channel*, 3rd July, available at brandchannel.com
- Jalili, and Michael H., (2007). "Citi to Issue Shell Cobranded Product." *American Banker*, Vol. 172, No. 190, pp. 9, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Jewell, Mark, (2007). "Winning Strategies Need Winning Mechanisms", *Energy and Power Management*, Vol. 32, No. 4, pp. 8, ABI/INFORM Trade and Industry.
- Kapferer, J.N., (2004). "Brand New World, Brand Equity", *The Economic Times*, Mumbai, June 30.
- Kaplan, S. Robert, (1998). "Mobil USM&R: Gasoline Marketing", *Harvard Business Review*, April 30, available at hbsp.harvard.edu/, accessed on 5th February, 2011.

- Kimpakorn, Narumon, Tocquer, Gerard, (2010). *Journal of Services Marketing*, Vol. 24, No. 5, pp. 378-388.
- Knox, Simon, (2004). “Positioning and Branding Your Organisation”, *The Journal of Product and Brand Management*, Vol. 13, No. 23, pp. 105, ABI/INFORM Global.
- Kotwala, Manish, (n.d.). “Petroleum Retailing- The Future is Now”, *Cedar Consulting*, available at www.cedar-consulting.com, accessed on 21st March, 2009.
- Krajewski, Steve, (1998). “Ogilvy & Mather creates more `answers' in \$50 mil. Image Campaign for Shell Oil”, *Adweek Southeast Edition*, Vol. 19, No. 6, pp. 5. *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Krishna, Deepa, (2008). “Crude Oil Prices Flare Up”, *Economic Times*, June 29th, pp. 7.
- Kumar Manish, (2002). “Indian Oil Corporation Limited: Project Manthan”, *Harvard Business Review*, pp. 1-19, available at hbsp.harvard.edu/, accessed on 19th December 2008.
- Laser, R., (2007). “BP takes Global Branding Role Away from Marketing”, *Marketing Week*, Vol.30, No. 5, pp. 3, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Lefton, Terry, (1993). “MasterCard, Shell play cards”, *Brandweek*, Vol. 34, No. 42, pp. 3, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- MacArthur K., (2003). “BP Rolls out \$20M Branding Effort”, *Advertising Age*, Vol.74, No. 20, pp. 8, *Business Source Premier*, EBSCOhost, accessed on 27 January 2011.
- Macrae, C. and Uncles, M.D., (1997). “Rethinking Brand Management: The Role of ‘Brand Chartering’”, *Journal of Product & Brand Management*, Vol. 6, No. 1, pp. 64-77.
- Market Assessment, (2000). “Forecourt Retailing 2000”, *Market Assessment Strategic Market Report*, pp. 1-89.

- McEwan Ron, 2001, “Position and Status of Retailing ‘Brand’ within the Industry”, *National Petroleum News*, Industry Voices, August 2001.
- Mitchell, A. (2003). “Rethink Brand Experience”, *Brand Strategy*, August Issue, pp. 4.
- Mohoni, Deepak, (2008). “Crude Behaviour”, *Economic Times*, June 30th, pp. 30.
- Morale, P., (2009). “Fuel Company Recreates Itself with Branding, New Name”, *Rutland Business Journal*, Vol.26, No. 12, pp. 13, *Regional Business News*, EBSCOhost, accessed on 27 January 2011.
- Moschis, G. P. Moore, Roy L., Stanley, Thomas J., (1984). *Advances in Consumer Research*, Vol. 11, No. 1, pp. 412-417.
- Motor Oil, (2000). “Branding Plays a Big Part in Consumer’s Choice of Motor Oil”, *Aftermarket Business*, July Issue, pp.31-32.
- Murphy, Claire, and Beyaztas, Binnur, (1998). “Anything to Petrol But Price”, *Marketing*, London, December Issue, pp. 19.
- Naughton, James, (2001). “Stand by your Brand”, *National Petroleum News*, Vol. 93, No. 9, pp. 20-26, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- NMA, (2004). “BP Takes on Sapient to Build Global Web Platform”, *New Media Age*, December Issue, pp.4.
- Oliver, R. L., (1993). *Journal of Consumer Research*, Vol.20, No.3, pp. 418-430.
- Palley, Thomas, (2008). “Beating The Oil Barons”, *Economic Times*, June 20th, pp.14.
- Panczyk, D. Tania, (2001). “Ogilvy Campaign backs BP’s Interactive Stations”, *Adweek*, Vol. 42, No. 6, pp. 4, ABI/INFORM Global.
- Parvar-Jahan, R. Mohammad, and Mohammadi, Hassan, (2009). “Oil Prices and Competitiveness: Time Series Evidence from Six Oil Producing Countries”, *Journal of Economic Studies*, Vol. 36, No. 1, pp. 98-118, available at emeraldinsight.com/0144-3585.htm accessed on 24th March, 2009.

- Patra, D.C., (2007). “Oil Sector Reforms in India: Evolution, Issues and a Possible Roadmap for Optimizing Growth”, Ph.D. Thesis.
- Pierre, Berthon, James, M Hulbert, and Leyland F Pitt, (1999). “Brand Management Prognostications”, *Sloan Management Review*, Vol.40, No. 2, pp. 53-65.
- Pieters, Rik, Edward, Rosbergen, and Michel, Wedel, (2002). “Breaking Through the Cluster: Benefits of Advertisement Originality and Familiarity for Brand Attention and Memory,” *Management Science*, Vol. 48, No. 6, pp. 765–781.
- Podolny, Joel, and Roberts, John, (1998). “The Global Oil Industry”, *Harvard Business Review*, pp. 1-10, available at hbsp.harvard.edu/ accessed on 30th June, 2008.
- Podolny, Joel, and Roberts, John, (1999). “British Petroleum: Organizing for Performance at BPX”, Graduate School of Business, Stanford University, July 1999, pp. 1-17.
- Priestland, Andreas, and Hanig, Robert, (2005). “Developing First Level Leaders”, *Harvard Business Review*, June Issue, pp. 1-10, available at hbsp.harvard.edu/, accessed on 30th June 2008.
- Pysarchik, Thorndike, Dawn et. al., (2007). “Cultural Influences on New Product Adoption of Affluent Consumers in India”, *The International Review of Retail, Distribution and Consumer Research*, Vol. 18, No. 2, pp. 203-220.
- Quilter, James, (2006). “BP Signs up Advertisers for Debut of In-Store TV”, *Marketing*, December Issue, pp. 3.
- Radler Marilyn, (2008), “Oil Market Heading for Surprises in’08”, *Oil and Gas Journal*, Vol. 106, No. 1, pp. 20, ABI/INFORM Global.
- Rao, A. R, Ruekert, and Robert, W., (1994). “Brand Alliances as Signals of Product Quality”, *Sloan Management Review*, Vol. 36, No. 1, pp. 87.
- Reinhardt, Forest, Masanell, Casadesus, Ramon, and Hanson J. David, (2006). “BP and the Consolidation of the Oil Industry, 1998-2002”, *Harvard Business Review*, available at hbsp.harvard.edu/, accessed on 9th March 2009, pp. 1-27.

- Ruback, S. Richard, (2004). “Pioneer Petroleum”, *Harvard Business Review*, available at hbsp.harvard.edu/, accessed on 30th June, 2008.
- Salimando, Joe, (2007). “Living in Interesting Times”, *Energy and Power Management*, Vol. 32, No. 5, pp. 8, ABI/INFORM Trade and Industry.
- Selame, Elinor, (1993). “Commentary: Unlocking the brand asset vault”, *The Journal of Product and Brand Management*, Vol. 2, No. 1, pp. 20.
- Shankar, S., et. al., (2008). “How to Win in Emerging Markets”, *MIT Sloan Management Review*, Vol. 49, No. 3, pp. 19-23.
- Sharp, Jo Ellen Meyers, (1997). Editor & Publisher, Vol.130, No.29, pp. 28.
- Shell's unmanned Denmark strategy makes sense, 2007, *MarketWatch: Energy*, Vol.6, No. 4, pp.17-18, Business Source Premier, EBSCOhost, accessed on 27 January 2011.
- Silverstein, Barry, (n.d.). “Pumping Energy Into Gasoline Branding”, available at brandchannel.com, accessed on 26th May 2008.
- Simon Knox, (2004). “Positioning and Branding your Organisation”, *The Journal of Product and Brand Management*, Vol. 13, No. 2, pp.105-115.
- Smith, Robert E., and William, R. Swinyard, (1982). “Information Response Models: An Integrated Approach”, *Journal of Marketing*, Vol. 46, No. 1, pp. 81–93.
- Snow, Nick, (2008). “API: Rising Oil Prices, Falling Stocks Constrain Demand”, *Oil and Gas Journal*, Vol. 106, No. 4, pp. 26, ABI/INFORM Global.
- Snow, Nick, (2008). “US Study Commission Calls for more Alternate Fuel R&D”, *Oil and Gas Journal*, Vol. 106, No. 3, pp. 47, ABI/INFORM Global
- Sultan, Fareena, and Rohm, Andrew, (2005). “The Coming Era of Brand in the Hand Marketing”, *MIT Sloan Management Review*, Vol. 47, No. 1, pp. 83-89

- Swaminathan, V., Stille K.M. and Ahluwalia R. (2009), “When Brand Personality Matters: The moderating Role of Attachment Styles.” *Journal of Consumer Research*, Vol. 35, No.6, 985-1002.
- Tambee, Rozmeen, (2002). “The Gas Industry: Market Report 2002”, *Key Note*, pp.1-100.
- Tarnovskaya, Veronika, Elg, Ulf, and Burt, Steve, (2008). “The Role of Corporate Branding in a Market Driving Strategy”, *International Journal of Retail and Distribution Management*, Vol. 36, No. 11, pp. 941-965.
- Ulwick, W. Anthony, and Bettencourt, A. Lance, (2008). “Giving Customers a Fair Hearing”, *MIT Sloan Management Review*, Vol. 49, No. 3, pp. 61-68.
- Urban, L. Glen, (2004). “The Emerging Era of Customer Advocacy”, *MIT Sloan Management Review*, Vol. 45, No. 2, pp. 77-82.
- Valentine, Matthew, (2008). “Brand Experience: Experience Necessary”, *In-Store*, 10th October, pp. 25.
- Watkins Eric, (2008). “Beyond Petroleum”, *Oil and Gas Journal*, Vol. 106, No. 11, pp. 35, ABI/INFORM Global.
- Weilbacher, W.M., (1995). *Brand Marketing*, NTC Business Books, Chicago, pp.4.
- Wilcox, Michael, (1997). “Indian Refiner/ Marketers must Adapt to Changes within Deregulation”, *Oil and Gas Journal*, October 20, Vol. 95, No. 42, pp. 31, ABI/INFORM Global.
- Williams, Jay, (2004). "Branding Your Business", *Dealernews*, Vol. 40, No. 7, pp. 20, *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Woodruff, R.B., (1997). Customer value: The next source of competitive advantage. *Journal of the Academy of Marketing Science*, Vol. 25, No.2, pp. 139–153.

REFERENCES

- Aaker, D. A., (1991). “Managing Brand Equity: Capitalizing on the Value of a Brand Name”, *The Free Press*, pp. 7, 39, 61, 110.
- Aaker, D.A., (1996). “Building Strong Brands”, The Free Press, New York, NY, pp. 35, 71.
- Aaker, D.A., and Joachimsthaler, E., (2000). “Brand Leadership”, *The Free Press*, New York, pp. 13, 27, 40, 48.
- Aaker, David A., (2003). “The Power of the Branded Differentiator”, *MIT Sloan Management Review*, Vol. 45, No.1, pp. 83-87.
- Aaker, J., (1997). “Dimensions of brand personality”, *Journal of Marketing Research*, Vol. 34, No. 8, pp. 347–356.
- Abela, Andrew, (2002). “Additive versus Inclusive Approaches to Measuring Brand Equity: Practical and Ethical Implications”, *Journal of Brand Management*, Vol. 10, No. 4-5, pp.342-352.
- Ailawadi, K.L., Lehmann, D.R., and Neslin, S.A., (2002). “A Product –Market- Based Measure of Brand Equity”, *Working Paper No. 02-102*, Marketing science Institute, Cambridge, MA, USA.
- Albaum, Gerald, Best Roger, and Hawkins Del, (1977). "The Measurement Properties of Semantic Scale Data", *Journal of the Market Research Society*, Vol.19 (January), pp. 21-26.
- Alden, D. L., Steenkamp, J.B.E.M., & Batra, R., (1999). “Brand Positioning through Advertising in Asia, North America, and Europe: The Role of Global Consumer Culture”, *Journal of Marketing*, Vol.63, No. 1, pp.75-87.
- Ambler, T. and Barwise, P., (1998). “The Trouble with Brand Valuation”, *Journal of Brand Management*,” Vol. 5, No. 5, pp. 367-377.

- Anderson, J.R., (1983). “A Spreading Activation Theory of Memory”, *Journal of Verbal Learning and Verbal Behaviour*, Vol. 22, pp. 261–295.
- Ang, B.W., & Tan, K.C., (1990). “Forecasting of Diesel and Petrol Sales: An Evaluation of Various Marketing Strategies”, *Energy Policy*, Vol.18, No. 3, pp. 246-254.
- Ang, Swee Hoon, and Low, S. Y. M., (2000). “Exploring the Dimension of Ad Creativity,” *Journal of Psychology and Marketing*, Vol. 17, No.10, pp. 835–854.
- Arnott, Sarah, (2008). “BP Aims to Win More Than Plaudits From Pounds 50m Olympic”, *Independent, The London*, 4th July.
- Asian Development Bank Report, 2008, (Online) Available at <http://www.adb.org/Documents/Reports/Energy-Efficiency-Transport/chap02.pdf> accessed on June21, 2010.
- Assael, H., (2001). “Consumer Behaviour and Marketing Action”, *Thomson Learning*, 6th ed. Boston, MA.
- Attri R., Pahwa, M.S., Urkude M. Ashish, (2011a). “India’s Petroleum Market: Journey from a Commodity to a brand”, *Prabandhan & Taqniki, Management Research Journal*, Vol. 5, August 2011, pp. 78-82.
- Attri R., & Pahwa M.S. (2012). “A Comparative Study of Brand Building Activities of Oil Marketing Companies in India with their Western Counterparts” Conference Proceedings of the 15th International Conference held at NIRMA University in January 2012 at Ahmedabad, pp. 45-54.
- Attri R., Pahwa, M.S., Urkude M. Ashish, (2011b). “Study of Brand Position & Customer Loyalty for Public Sector Oil marketing Companies”, *International Journal of Management Prudence*, Vol. 2, No.2, pp. 25-35.

- Attri R., Pahwa, M.S., Urkude M. Ashish, (2011c). “Measuring Public Sector Oil Marketing Companies’ Brand Awareness”, *IUP Journal of Brand Management*, Vol. 8, No.4, pp. 7-24.
- Atilgan, Ada, Aksoy, Safak, Akinci, Serkan and Kaynak, Erdener, (2009). “Customer Based Brand Equity for Global Brands: A Multinational Approach”, *Journal of Euromarketing*, Vol. 18, pp.115-132.
- Auty, Susan, and Elliot, Richard, (2001). “Being Like or Being Liked: Identity vs Approval in a Social Context”, *Advances in Consumer Research*, Vol. 28, No.1, pp.235-240.
- Balakrishnan, R., Mahanta, V., (2004). “Brick in the Call Brand Equity”, *The Economic Times*, Mumbai, August 18 issue.
- Barwise, P., (1993). “Brand Equity, Snark or Boojum?” *International Journal of Research in Marketing*, Vol. 10, March Issue, pp. 93-104.
- Belk, Russell, W., (1988). “Possessions and the Extended Self”, *Journal of Consumer Research*, Vol. 15, No. 2, pp. 139-168.
- Bellizzi, J. A., Krueckeberg, H. F., Hamilton, J. R., & Martin, W.S., (1981). “Consumer Perceptions of National, Private, and Generic Brands”, *Journal of Retailing*, Vol. 57, No.4, pp.56–70.
- Bhardwaj, Vertica, Kumar, Archana, Youn-Kyung Kim, (2010). “Brand Analyses of U.S. Global and Local Brands in India: The case of Levi’s”, *Journal of Global Marketing*, Vol. 23, No.1, pp. 80-94.
- Bhat, S., and Reddy, S., (1998). "Symbolic and Functional Positioning of Brands", *Journal of Consumer Marketing*, Vol.15, No. 1, pp. 32-43.
- Blankson, Charles, Kalafatis, S. P., Cheng, Julian Ming-Sung & Hadjicharalambous, C., (2008). “Impact of Positioning Strategies on Corporate Performance”, *Journal of Advertising Research*, Vol. 48, No. 1, pp. 106-122.
- Bogoslaw, David, (2002). “BP’s New Gas Stations to Drive Effort to Go Beyond Petroleum”, *Wall Street Journal*, 24th July, pp. B.3.H.

- Boulding, William, Kalra, Ajay, and Staelin, Richard, (1993). “The Quality Double Whammy”, *Marketing Science*, Vol. 18, No. 4, pp.463-484.
- Bowen, John T., and Shoemaker Stowe, (1998). “Loyalty: A Strategic Commitment”, *Cornell Hotel and Restaurant Administration Quarterly*, Vol. 44, No. 5/6, pp. 31-46.
- Boylan, Brian, (2000). “BP’s Logo Change Acknowledges the Critical Role Branding Plays in Corporate Progress”, *Financial Times*, 10th August, pp.11.
- Brad, Van Auken, (n.d.), “The Blake Project: Evaluate your Brand” available at www.TheBlakeProject.com accessed on 15th June, 2009.
- Branding Strategy Insider, 2010, “10 Branding and Marketing Trends for 2010” available at <http://www.brandingstrategyinsider.com/2009/10/10-branding-and-marketing-trends-for-2010.html>
- Broadbent, Simon, Colman, Stephen, (1986).“Advertising Effectiveness Across Brands”, *Journal of the Market Research Society*, Vol. 28, No. 1, pp. 15-24.
- Brown, S. Kozinets, R.V., Sherry J.F. Jr., (2003). “Teaching Old Brands New Tricks: Retro Branding and the Revival of Brand Meaning”, *Journal of Marketing*, Vol. 67, July Issue, pp. 19-33.
- Buckinx, Wouter, Van den Poel, Dirk, (2005). “Customer Base Analysis: Partial Defection of Behaviourally Loyal Clients in a Non-contractual FMCG Retail Setting”, *European Journal of Operational Research*, Vol. 164, No. 1, pp. 252-268.
- Burton, J., & Easingwood, C., (2006). “A Positioning Typology of Consumers' Perceptions of the Benefits Offered by Successful Service Brands”, *Journal of Retailing and Consumer Services*, Vol. 13, No. 5 pp. 301-316.
- Bushman, B.J., (1993). “What’s in a Name? The moderating Role of Public Self-Consciousness on the Relation between Brand Label and

- Brand Preference”, *Journal of Applied Psychology*, Vol. 78, No.5, pp. 857–861.
- Chaudhuri, A. & Holbrook, M. B., (2001). “The Chain of Effects from Brand Trust and Brand Affect to Brand Performance: The Role of Brand Loyalty”, *Journal of Marketing*, Vol. 65, No. 2, pp.81–93.
 - Chazen, J. A., (1996). “Notes from the Apparel Industry: Two Decades at Liz Claiborne”, *Columbia Journal of World Business*, Vol. 31, No. 2, pp. 40-43.
 - Chen, Ching-Fu, Tseng, Wen-Shiang, (2010). “Exploring Customer Based Airline Brand Equity: Evidence from Tiwan”, *Transportation Journal*, Vol. 49, No. 1, pp.24-34.
 - Chen, J., and Yang, X., Smith, R.E., (2008). “The Impact of Advertising Creativity on the Hierarchy of Effects”, *Journal of Advertising*, Vol. 37, No. 4, pp. 47-61.
 - Chernatony, L., and McDonald, M., (1998). “Creating Powerful Brands”, 2nd ed., Butterworth Heinemann, Oxford.
 - Choudhury, S. Roy, (2011). “Changing Distribution System”, *The Hindu Survey of Indian Industry*, pp. 147-151.
 - CMIE-Centre for Monitoring Indian Economy, 2010, available at www.cmie.com
 - Cobb-Walgren, C. J., Ruble, C. A., & Donthu, N. (1995). “Brand Equity, Brand Preference, and Purchase Intention”, *Journal of Advertising*, Vol. 24, No.3, pp. 25-40.
 - Collins, A.M., & Loftus, E.F., (1975). “A Spreading-Activation Theory of Semantic Processing”, *Psychological Review*, Vol. 82, No. 6, pp. 407–428.
 - Collins, A.M., & Quillian, M.R., (1969). “Retrieval Time from Semantic Memory”, *Journal of Verbal Learning and Verbal Behaviour*, Vol. 8, No.1, pp. 240–248.
 - Consumer Pyramids, CMIE, 2010, available at www.consumer-pyramids.com.

- Crimmins, C. James, (2000). “Better Measurement and Management of Brand Value”, *Journal of Advertising Research*, Vol. 40, No. 6, pp. 136-144.
- Crosby, P.B., (1979). “Quality is Free: The Art of Making Quality Certain”, New York: New American Library, pp.147.
- Dag, Bennett, Ehrenberg, Andrew, & Goodhardt, Gerald, (2000). “Two Purchase Analysis of Brand Loyalty among Petrol Buyers”, ANZMAC 2000, *Visionary Marketing for the 21st Century: Facing the Challenge*.
- David, A. Shore, (2005). “Branding: Differentiation that Customers Value”, Harvard Business Press, available at http://cb.hbsp.harvard.edu/cb/web/search_results.seam?Ntt=branding&conversationId=315732 , accessed on 14th July, 2009.
- Derrick Daye, (2008). “Branding Strategy Insider”, available at <http://www.brandingstrategyinsider.com/brad-vanauken.html> accessed on 20th March, 2010.
- Desai, Deven, and Waller, Spencer, (2010). “Brands, Competition and the Law”, *Brigham Young University Law Review*, Vol. 2010, Issue 5, pp. 1425-149.
- Desai, Kalpesh, Kaushik, and Kevin, L. Keller, (2002). “The Effects of Ingredient Branding Strategies on Host Brand Extendibility” *Journal of Marketing*, Vol. 66, January Issue, pp.73-93.
- Dhar, K. Sanjay, and Hoch, J. Stephen, (1997). “Why Store Brand Penetration Varies by Retailers”, *Marketing Science*, Vol. 16, No. 3, pp. 208-227.
- Dick, A. S., & Basu, K., (1994). “Customer Loyalty: Toward an Integrated Conceptual Framework”, *Journal of Academy of Marketing Science*, Vol.22, No. 2, pp. 99–113.
- Dugar, A., (2007), “Marketing of Petrol in India -- Transformation of an Undifferentiated Low Involvement Commodity into High Involvement Brands”, *Innovative Marketing*, Vol.3, No.4, pp.51-58. Retrieved March 16, from Business Source Complete database.

- Embrey, Alison, (2004). "Battle of the Brands" *Convenience Store News*, Vol.40, No. 8, pp. 20-26. *Business Source Premier*, EBSCO host, accessed on August 11, 2010.
- Erdem, Tulin, Michael, P. Keane, and Baohung, Sun, (2008). "A Dynamic Model of Brand Choice when Price and Advertising Signal Product Quality", *Marketing Science*, Vol. 27, No. 6, pp.111-125.
- Farquhar, Peter H., (1989). "Managing Brand Equity", *Marketing Research*, Vol.1, No.3, pp. 24-33.
- Feigenbaum, A.V., (1951). "Quality Control: Principles, Practice, and Administration", New York: McGraw-Hill, pp.302-313.
- Fournier, Susan, (1998). "Consumer and Their Brands: Developing Theory in Consumer Research", *Journal of Consumer Research*, Vol. 24, No. 4, pp. 343-373.
- Ghodeswar, M. Bhimrao, (2008). "Building Brand Identity in Competitive Markets: A Conceptual Model", *Journal of Product and Brand Management*, Vol. 17, No.1, pp. 4-12.
- Goldenberg, Jacob, Mazursky, David, and Solomon, Sorin, (1999). "The Fundamental Templates of Quality Ads", *Marketing Science*, Vol.18, No. 3, pp. 333–351.
- Gorst, J., Kanji, G., & Wallace, W., (1998). "Providing Customer Satisfaction", *Total Quality Management*, Vol. 9, No.4&5, pp.100–103.
- Gounaris, Spiros and Stathakopoulos, Vlasis, (2004). "Antecedents and Consequences of Brand Loyalty: An Emperical Study", *Journal of Brand Management*, Vol. 11, No. 4, pp. 283-306.
- Green, P.E., & Srinivasan, V., (1990). "Conjoint Analysis in Marketing: New Developments with Implications for Research and Practice", *Journal of Marketing*, Vol. 54, No.4, pp. 3–19.
- Greenberg, Karl, (2002). "Shell's New Game", *Brandweek*, Vol. 43, No. 18, pp. 5, ABI/INFORM Global.

- Guo, Liang, and Ying, Zhao, (2009). "Voluntary Quality Disclosure and Market Interaction", *Marketing Science*, Vol. 28, No. 3, pp.488-501.
- Haley, Russel, I., and Peter, B. Case, (1979). "Testing Thirteen Attitude Scales for Agreement and Brand Discrimination", *Journal of Marketing*, Vol. 43, No.3, pp. 20-32.
- Haley, Russell I., (1985). "Developing Effective Communications Strategy". New York: Wiley/Ronald Press, pp. 207.
- Hamdi, Raini, (2003). "Battle of Brands", Reality Advertising.
- Hawkins, Del., Albaum, Gerald, and Roger, Best, (1974). "Stapel Scale or Semantic Differential in Marketing Research?" *Journal of Marketing Research*, Vol.11, No.8, pp. 318-322.
- Hirschman, E., and Holbrook, M., (1982). "Hedonic Consumption: Emerging Concepts, Methods and Propositions", *Journal of Marketing*, Vol. 46, pp. 92-101.
- Holden, Stephen J.S., and Richard, J. Lutz, (1992). "Ask Not What the Brand Can Evoke; Ask What Can Evoke the Brand", *Advances in Consumer Research*, Vol.19, pp. 101-107.
- Holmes, Cliff, (1974). "A Statistical Evaluation of Rating Scales", *Journal of the Market Research Society*, Vol.16, No. 4, pp.87-107.
- Holt, B. Douglas, (n.d.). "Brands and Branding", Cultural Strategy Group, pp. 1-11.
- Hooley, G., Greenley, G., Fahy, J., & Cadogan, J., (2001). "Market-Focused Resources, Competitive Positioning and Firm Performance", *Journal of Marketing Management*, Vol. 17, No. 5-6, pp. 503-20.
- Howard, John A., and Jagdish, N. Sheth, (1969). "The Theory of Buyer Behaviour", New York, NY: John Wiley and Sons.
- Hughes, G. David, (1969). "Some Confounding Effects of Forced Choice Scales", *Journal of Marketing Research*, Vol.6, No. 5, pp. 223-226.

- Jagdeep, Kapoor, (2003). “18 Brand Astras-Using Brand Abilities as Weapons for CRISP Brand Building”, Sage Publications Pvt. Ltd.
- Joachimsthaler, Erich, and Aaker, A. David, (1999). “ Building Brands Without Mass Media”, *Harvard Business Review*, pp. 1-10
- Joiner, C., (1998). “Concept Mapping in Marketing: A Research Tool for Uncovering Consumers’ Knowledge Structure Associations”, *Advances in Consumer Research*, Vol. 25, No. 1, pp. 311–317.
- Jones, A. Michael, Mothersbaugh, L. David, and Beatty, E. Sharon, (2000). “Switching Barriers and Repurchase Intentions in Services”, *Journal of Retailing*, Vol. 76, No.2, pp. 259-274.
- Jones, J. P., (2000). “Behind Powerful Brands”, Tata McGraw Hill, Noida, pp.286.
- Joyce, Timothy, (1963). "Techniques of Brand Image Measurement", *New Developments in Research*. London: Market Research Society, pp. 45-63.
- Juran, J.M., Gryna, F. Jr.,& Bingham, R. S., (1974). “Quality Control Handbook”, New York: McGraw-Hill, pp. 64.
- Kalwani, Manohar U., and Alvin, J. Silk, (1982). "On the Reliability and Predictive Validity of Purchase Intention Measures”, *Marketing Science*, Vol. 1, No.1, pp. 243-286.
- Kapoor, Srikant, (2009). “Advertising Revisited- The Good, Bad and Ugly”, Faculty Column, Institute of Management Education, available at <http://www.indianmba.com/Faculty-Column/FC27/fc27.html>.
- Kassarian, Harold, H. and Ma Sao, Nakanishi, (1967). “A Study of Selected Opinion Measurement Techniques”, *Journal of Marketing Research*, Vol. 4, No.5, pp. 148-153.
- Kayaman, R., & Arasli, H., (2007). “Customer Based Brand Equity: Evidence from the Hotel Industry”, *Managing Service Quality*, Vol. 17, No. 1, pp. 92-109.
- Keller K.L., (2003a), “Brand Synthesis: The Multidimensionality of Brand Knowledge”, *Journal of Consumer Research*, Vol. 29, Issue 4.

- Keller, K. (1993), “Conceptualising, Measuring, and Managing Customer-Based Brand Equity”, *Journal of Marketing*, Vol. 57, No.1, pp. 1-22.
- Keller, K. L., (2000). “The Brand Report Card”, *Harvard Business Review*; Vol.78, No. 1, pp. 147-157.
- Keller, K., (1998). “Strategic Brand Management: Building, Measuring, and Managing Equity”, Prentice-Hall.
- Keller, K.L., (2001). Editorial: Brand Research Imperatives, *Journal of Brand Management*, Vol. 9, No. 1, pp. 4-6.
- Keller, K.L., (2002). “Strategic Brand Management: Building, Measuring, and Management Brand Equity”, Pearson Education, 2nd edition, Upper Saddle River, NJ, pp.245.
- Keller, K.L., (2003b). “Strategic Brand Management: Building, Measuring and Managing Brand Equity”, International Edition. New Jersey: Prentice Hall Publication, pp.324.
- Kim, W. G., and Kim, H., (2004). “Measuring Customer Based Restaurant Brand Equity: Investigating the Relationship between Brand Equity and Firm’s Performance”, *Cornell Hotel and Restaurant Administration Quarterly*, Vol. 45, No. 2, pp. 115-131.
- Klaus, S., Ludlow, C., (2002). “Inclusive Branding”, Palgrave Macmillan, Basingstoke, pp.235.
- Knapp, D.E., (2000). “The Brand Mindset”, McGraw-Hill, New York, pp. 33, 36, 103.
- Knox, Simon, Walker, David, (2001). “ Creativity in Marketing Management- A Unified Approach”, *Journal of Strategic Marketing*, Vol. 9, No. 2, pp. 111-128.
- Kopalle, Praveen, K., and Lehmann, R. Donald, (2006). “Setting Quality Expectations when Entering a Market: What Should the Promise Be?” *Marketing Science*, Vol.25, No.1, pp. 8-24.
- Kotler, P., & Keller, K. L., (2006). *Marketing Management*, 12th ed., Upper Saddle River, NJ: Prentice Hall Publication, pp.745.

- Kotler, P., (2000). *Marketing Management: Analysis, Planning, Implementation, and Control*”, Upper Saddle River, NJ: Prentice-Hall.
- Kotler, P., (2009). “Brand New Direction: Viewpoint Brian Boylan: BP’s Logo Change Acknowledges the Critical Role Branding Plays in Corporate Progress”, *Financial Times*, London (UK), August 9, 2009.
- Kotler, P., and Keller, K.L., (2009). *Marketing Management*, 13th ed., Upper Saddle River, NJ: Prentice Hall.
- Kover, Arthur J., Goldenberg, Stephen, M., and James, William, L. (1995). “Creativity Vs. Effectiveness? An Integrative Classification for Advertising,” *Journal of Advertising Research*, Vol. 35 November/December Issue, pp. 29–38.
- Kristensen, K. K., Kanji, G. K., & Dahlgaard, J. J., (1992). “On Measurement of Customer Satisfaction”, *Total Quality Management*, Vol. 3, No. 2, pp. 123–128.
- Kumar, P., & Sahay, A., (2004). “Retailing at Petrol Pumps: From Commodity Dispensing to Customer Service”, *Journal of Services Research*, Vol. 3, No. 2, pp. 29-52.
- Lavidge, Robert J., and Gary, A. Steiner, (1961). “A Model for Predictive Measurements of Advertising Effectiveness”, *Journal of Marketing*, Vol. 25, No.10, pp.59–62.
- Light, Larry, & Kiddon, Joan, (2010). “Six Rules for Brand Revitalization”, *Wharton School Publishing*, pp.154.
- Marketing and Development Research Associates (MDRA), (2003). *Oil and Gas Industry Research*, available at <http://www.mdraonline.com/Industry> , and <http://www.bharatpetroleum.com/genera/gen-currupdate.asp> accessed on 18th July 2008.
- Mazursky, David, La Barbera, Pricilla, and Aiello Al, (1987). “When Consumers Switch Brands”, *Journal of Psychology and Marketing*, Vol 4, No. 1, pp. 17-30.

- Mc Alister, L., Srinivasan, R., & Kim, M.C., (2007). Advertising Research and Development, and Systematic Risk of the Firm. *Journal of Marketing*, Vol. 71, No.1, pp. 35-48.
- McDonald, C., (1992). “How Advertising Works - a Review of Current Thinking”, NTC Publications, in association with the Advertising Association, Henley-on-Thames.
- McGuire, William J., (1968). “Personality and Attitude Change”, in *Psychological Foundations of Attitudes*, Timothy C. Brock, Thomas M. Ostrom, and Anthony G. Greenwald, eds., San Diego: Academic Press.
- McQuarrie, Edward F., and David G. Mick (1992). “On Resonance: A Critical Pluralistic Inquiry into Advertising Rhetoric”, *Journal of Consumer Research*, Vol.19, No. 2, pp.180–197.
- MDRA-Marketing and Development Research Associates, (2003). Consumer Survey, available at MDRA online.com
- Meenaghan, T., (1995). “The Role of Advertising in Brand Image Development”, *Journal of Product and Brand Management*, Vol.4, No.4.
- Menezes, Dennis, and Elbert, Norbert F, (1979). “Alternative Semantic Scaling Formats for Measuring Store Image: An Evaluation”, *Journal of Marketing Research*, Vol.16, No. 2, pp. 80-87.
- Mitra, Debanjan, and Peter, N. Golder, (2006). “How does Objective Quality Affect Perceived Quality? Short Term Effects, Long Term Effects and Asymmetries”, *Marketing Science*, Vol. 25, No. 3, pp.230-247.
- MoPNG- Ministry of Petroleum and Natural gas, 2010, available at <http://petroleum.nic.in/> .
- Morrison, Donald G., (1979). “Purchase Intentions and Purchase Behaviour”, *Journal of Marketing*, Vol. 43, No. 4, pp. 65-74.

- Murphy, J., (1998). “What is Branding?” in Hart S., Murphy J. (eds), *Brand: The New Wealth Creators*, Macmillan Business, Basingstoke, pp. 2.
- Nebel, Jean-Francois, Blattberg, Robert, C. (n.d.). “Brand Relationship Management- A New Approach for the Third Millennium”, White Paper, available at <http://nebel.CRMproject.com> accessed on 8th March, 2008.
- Nedungadi, Prakash, and J., Wesley, Hutchinson, (1985). “The Prototypicality of Brands: Relationships with Brand Awareness, Preference and Usage”, *Advances in Consumer Research*, Vol. 12, pp.498-503
- Oil Quote, (2010). “What are the Largest Oil Companies on the Planet?” available at <http://www.quoteoil.com/oil-companies.html> .
- Oliver, R.L., (1997). “Satisfaction: A Behavioural Perspective on the Consumer”, McGraw Hill, New York, NY.
- Parameswaran, M.G., (2001). “Brand Building & Advertising: Concepts and Cases”, Tata McGraw Hill, Noida, pp. 2-3.
- Parasuraman, A., Zeithaml, V.A., & Berry, L.L., (1988). “SERVQUAL: A Multiple-Item Scale for Measuring Consumer Perceptions of Service Quality”, *Journal of Retailing*, Vol. 64, pp. 12–40.
- Park, C., Whan, Jun, Sung, Youl, and Shocker, Allan, D., (1996). “Composite Branding Alliances: An Investigation of Extension and Feedback Effect”, *Journal of Marketing Research*, Vol.33, No.4, pp. 453-467.
- Peracchio, Laura A., and Joan, Meyers-Levy, (1994). “How Ambiguous Cropped Objects in Ad Photos Can Affect Product Evaluations”, *Journal of Consumer Research*, Vol. 21, No.1, pp.190–204.
- Petroleum Planning and Analysis Cell, (2010). available at petroleum.nic.in/petstat.pdf

- Pick, David F., John Sweeney, and Jennifer, A. Clay, (1991). “Creative Advertising and the Von Restorff Effect”, *Psychological Reports*, Vol. 69, No. 3, pp. 923–926.
- Pieters, Rik, Warlop, Edward, Rosbergen, and Wedel Michel, (2002) “Breaking Through the Cluster: Benefits of Advertisement Originality and Familiarity for Brand Attention and Memory”, *Management Science*, Vol. 48, No. 6, pp.765–781.
- Porter, M. E., (1996). “What is Strategy?” *Harvard Business Review* Vol. 74, No. 6, pp. 61-78.
- Porter, S. Stephen, and Claycomb, Cindy, 2000, “The Influence of brand Recognition on Retail Store Image”, *Journal of Product and Brand Management*, Vol. 6, No. 6, pp. 373.
- Prince, M., (1990). “How Consistent is the Information in Positioning Studies?” *Journal of Advertising Research*, Vol. 30, No. 3-4, pp.25-30.
- Punniyamoorthy, M., & Prasanna, Mohan Raj M., (2007). “An Empirical Model for Brand Loyalty Measurement”, *Journal of Targeting, Measurement and Analysis for Marketing*, Vol.15, pp. 222-233.
- Ramage, Norma, (2005). “Go East, Young Airline”, *Marketing Magazine*, Vol. 110, No. 41, pp. 38.
- Randall, Taylor, Ulrich, Karl, and Reibstein, David, (1998). “Brand Equity and Vertical Product Line Extent”, *Marketing Science*, Vol. 17, No.4, pp. 356-379.
- Richardson, P.S., Dick, A.S., & Jain, A.K., (1994). “Extrinsic and Intrinsic Cue Effects on Perceptions of Store Brand Quality”, *Journal of Marketing*, Vol. 58, No.4, pp. 28–36.
- Ries, A., & J. Trout, (1986). “Positioning: The Battle for Your Mind”, Maidenhead, U.K.: McGraw-Hill.
- Roedder, John, D., Loken, B., Kyeong-Heui, K. & Alokparna Basu, M. (2006). “Brand Concept Maps: a Methodology for Identifying Brand

- Association Networks”, *Journal of Marketing Research*, Vol.43, No.11, pp. 549–563.
- Roll, Martin, (2009). “Managing Brand Equity through Metrics”, Customer Management IQ, available at <http://www.customermanagementiq.com/strategy/articles/managing-brand-equity-through-metrics/> accessed on 6th December 2010.
 - Rosen, D.L., (1984). “Consumer Perceptions of Quality for Generic Grocery Products: A Comparison across Categories”, *Journal of Retailing*, Vol. 60, No. 4, pp. 64–80.
 - Rosser, Michael, (2002). “Excel Airways Embarks on Drive to Build Awareness”, *Precision Marketing*, Vol. 15, No. 5, pp. 3.
 - Rossiter, John, R., and Larry, Percy, (1987). “Advertising and Promotion Management”, New York, NY: McGraw Hill.
 - Ruimin, Zhang, (2006). “Building Global Asian Brands”, *Far Eastern Economic Review*, Vol. 169, No. 9, pp. 61-62.
 - Rust, Roland, T., Anthony, J., Zahorik, and Timothy, L., Keiningham, (1995). “Return on Quality (ROQ): Making Service Quality Financially Accountable”, *Journal of Marketing*, Vol. 59, January Issue, pp.58-70.
 - Ryan, Thomas J., (2005). “Labels Grow up”, *Apparel Magazine*, Vol. 46, No. 6, pp. 26-29.
 - Schmittlein, David, C., (1984). “Assessing Validity and Test-Retest Reliability for "Pick K of N" Data”, *Marketing Science*, Vol. 3, No.2, pp. 23-40.
 - Schoell, W.F., & Gultinan, J.P., (1990). “Marketing Contemporary Concepts and Practices”, Allyn and Bacon, Boston, MA.
 - Scott, M. Davis, (2002). “Brand Asset Management: Driving Profitable Growth through your Brands”, *Jossey-Bass Business & Management Publication*, 2nd edition, pp.10-12.

- Sengupta, Subroto, (2005). “Brand Positioning: Strategies for Competitive Advantage”, *Tata McGraw –Hill Publication*, 2nd edition, pp. 34-45.
- Sherrington, Mark, (2003). “Brand Health Check”, *Brand Strategy*, No. 173, pp. 30.
- SIAM-Society of Indian Automobile Manufacturers, (2010). “Industry Statistics”, available at www.siamindia.com.
- Smith, R. E., Chen, J., & Yang, X. (2007). “The Impact of Advertising Creativity on the Hierarchy of Effects”, *Journal of Advertising*, Vol. 37, No.4, pp.47-61.
- Solomon, M., (2006). “Consumer Behaviour: Buying, Having, and Being”, Paris: Prentice Hall Publication, 8th ed., pp. 145-149.
- Steenkamp, Jan-Benedict E.M., Batra, Rajeev, and Alden, Dana, (2003). “How Perceived Brand Globalness Creates brand Value”, *Journal of International Business Studies*, Vol. 34, No. 1, pp.53-65.
- Stewart, David, W., and Furse, David, H., (1984). “Analysis of the Impact of Executional Factors on Advertising Performance”, *Journal of Advertising Research*, Vol. 24, No. 6, pp. 23–26.
- Subramanian B., Ghose S., (2003). “Reciprocal Spillover Effects: A Strategic Benefit of Brand Extensions”, *Journal of Marketing*, Vol. 67, pp. 4-13.
- Sudman, Seymour, and Bradburn, Norman, M. (1982). “Asking Questions”, San Francisco: Jossey-Bass Inc., Publishers.
- Superbrands India Pvt. Ltd. (2003). available at : www.superbrandsindia.com/superbrands2003/
- Swait, J., Erdem, T., Louviere, J. & Dubelar, C., (1993). “The Equalization Price: A Measure of Consumer-Perceived Brand Equity”, *International Journal of Research in Marketing*, Vol. 10, No.1, pp. 23–45.
- Temporal P., (2000). “Branding In Asia”, *John Wiley & Sons*, Singapore, pp. 11, 25-26, 33.

- Thomaselli, Rich, (2005). "Cruising on High Brand Awareness: Executives Turn Attention to Expansion", *Advertising Age*, Vol. 76, No. 26, pp. 48.
- Thomdick Edward L., (1920). "A Consistent Error in Psychological Ratings," *Journal of Applied Psychology*, Vol.4, No. 25, pp.9.
- Till, Brian D., and Baack, Daniel W., (2005). "Recall and Persuasion: Does Creativity Matter?" *Journal of Advertising*, Vol. 34, No. 3, pp. 47-57.
- Tong, Xiao Hawley, Jana, M., (2009). "Measuring Customer Based Brand Equity: Emperical Evidence from Sportswear Market in China", *Journal of Product & Brand Management*, Vol.18, No. 4, pp.262-271.
- Towriss, John, (1984). "A New Approach to the Use of Expectancy Value Models", *Journal of the Market Research Society*, Vol.26, January Issue, pp. 63-75.
- Trout, J., (1996). "The New Positioning: The Latest on the World's #1 Business Strategy", New York: McGraw- Hill.
- Tversky, A., (1977). "Features of Similarity", *Psychological Review*, Vol.84, No.4, pp. 327-352.
- Underwood, Elaine, (1997). "New Flight Plans", *Brandweek*, Vol. 38, No. 10, pp.32
- Ukpebor, Priscillia, and Ipogah, Bibiana, (2008). "A Study to Indicate the Importance of Consumer-Based Brand Equity on Consumer Perception of Brand: A Case of Fast Food Restaurants", Master Thesis in Business Administration, pp.17.
- Upshaw, L.B., (1995). "Building Brand Identity", *John Wiley & Sons*, New York, NY, 13th edition, pp.134-139.
- VMW Analytic Services, 2010, available at <http://unidow.com/india%20home%20eng/vmw%20analytic%20services.html>
- Verma, Harsh V., (2010). "Branding Demystified: Why Brands?", *Response Publishing*, pp. 11.

- Voss, Glenn B., Godfrey, Andrea, Seiders, Kathleen, (2010). “ How Complementarity and Substitution Alter the Customer Satisfaction-Repurchase Link”, *Journal of Marketing*, Vol. 74, No.6, pp.111-127.
- Vriens, M. & Frazier, C. (2003). “The Hard Impact of the Soft Touch: How to Use Brand Positioning Attributes in Conjoint”, *Marketing Research*, Vol.15, No. 2, pp. 23–27.
- Ward S., Larry L., Goldstine J., (1999). “What High-Tech Managers Need to Know About Brands”, *Harvard Business Review*, Issue July-August, pp. 85-95.
- Washburn, J.H., and Plank, R.E., (2002). “Measuring Brand Equity: An Evaluation of a Consumer Based Brand Equity Scale”, *Journal of Marketing Theory and Practice*, Vol. 10, No. 1, pp. 46-62.
- Wheatley, J.J., Walton, R.G., & Chiu, J.S.Y., (1977). “The Influence of Prior Product Experience, Price and Brand on Quality Perception”, *Advances in Consumer Research*, Vol.4, No.1, pp.72–77.
- Wikstrom, Solveig, (1996). “Value Creation by Company-Consumer Interaction”, *Journal of Marketing Management*, Vol. 12, No. 5, pp. 359-374.
- Woodruff, B. Robert, (1997). “Customer Value: The Next Source for Competitive Advantage”, *Academy of Marketing Science Journal*, Vol. 25, No. 2, pp. 139.
- www.bpcl.com
- www.hpcl.com
- www.iocl.com
- Yang, Xiaojing, and Smith, Robert E., (2009). “Beyond Attention Effects of Advertising Creativity”, *Marketing Science*, Vol. 28, No.5, pp. 935-948.
- Yoo B., Dhonthu N., (2001). “Developing and Validating a Multinational Consumer Based Brand Equity Scale”, *Journal of Buisness Research*, Vol. 52, No. 1, pp. 1-19.

- Yoo, B., Dhontu N., and Lee, S. (2000), “An Examination of Selected Marketing Mix elements and Brand equity”, *Journal of the Academy of Marketing Sciences*, Vol. 28, No. 2, pp. 195-211.
- Zaltman, G., (1997). “Rethinking Market Research: Putting People Back” *Journal of Marketing Research*, Vol. 34, No.4, pp. 424–437.
- Zeithaml, V.A., (1988). “Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence”, *Journal of Marketing*, Vol. 52, No.3, pp.2–22.