ISCTE Business School
Instituto Universitário de Lisboa

RAISING YOUR ARMS TOWARDS BRANDING:
HOW NARTA FOUND ITS PLACE IN A MATURE MARKET

David José do Carmo Chalbert Cardeira Gonçalinho

Project submitted as partial requirement for the conferral of

Master in Management

Supervisor:

Prof. Mónica Ferreira, ISCTE Business School, Marketing, operations and general management department

October 2017

Acknowledgements

This marks a new step on my academic journey, a finish line after so many races. Since it is an in-Company project, made during my work as a Product Manager in L'Oréal, my first acknowledgement goes to my team in the Hygiene Category. A special acknowledgement to ISCTE Business School and L'Oréal for making a project, where the theory is combined with the daily challenges of a manager, possible that will sure make a significant difference in this field.

A thank you to Mariana Carriço that was there in every step of this process. To Margarida Condado, Consumer Product Division Marketing Director, and Inês Caldeira, CEO of L'Oréal Portugal, for believing in this project and allowing it to come to life. Finally, a very special thank you to my manager, Ana Heleno, for teaching me the true role of a Brand Manager and the help to carry out this great rebranding process. This will stay in our history!

Crossing the professional with the academic world, a very special thank you to Professor Mónica Ferreira, my master thesis advisor, for all the encouragement, help and advice throughout all this process. To Susana Marques who started this journey with me and helped me to never give up on this important mark.

A thank you to my very best friend Tomázia Galhardo for always pushing me to the finish line with loads of motivation. In addition, to Sara Rodrigues, Gabriela Mussi and Vanessa Marques for their friendship, that started in ISCTE and it will last throughout our lives. At last, a very special thank you to Vítor Duarte for everything, since without him this project would never come to life.

At last, to my family for all the amazing support throughout my life and the constant believe that together we can achieve everything. A thank you to my mother for the unconditional support, a thank you to grandmother for the powerful inspiration and also to you little brother for challenging to strive.

Thank you.

Abstract

The main purpose of this project is to understand how a brand can differentiate itself in a mature market, having as key drivers the Brand Experience and Brand Communication Management. In this case, these conceptual models will be applied to Garnier's deodorant brand – Narta. Narta is a ten years old brand in Portugal of deodorants, sold in the mass-market circuit and with a flat performance in the last years.

"What people really desire are not products but satisfying experiences" (Abbot, 1955). This quote highlights the increasing importance of experiencing a brand and how it can lead to a powerful and unique differentiation strategy. Regarding Brand Experience dimension, the constructs of parity and similarity will be analyzed and, in order to provide a strong differentiation, the Isomorphic Change Model will help us to guide the management of external and internal pressures that pushes into similarity and parity. At last, a brief look at the Herzberg's motivational theory will be performed in order to fully understand the positive impact of a brand differentiation in the consumers' satisfaction/dissatisfaction dichotomy.

Communicating such difference will make a brand valuable and considered when the purchase act occurs. Matching the importance of the consumer journey with an Integrated Marketing Communication plan, Narta will be able to communicate its new positioning and enhance its performance.

This study will not only take in consideration market insights from Nielsen but also shopper and consumer insights in both quantitative and qualitative ways from independent agencies. These studies will help to establish a proper conclusion about the brand's perception and the brand's competitiveness when comparing with other deodorants brands in Portugal.

Hence, this project aims to diagnose the reason beyond the flat performance of Narta and implement a new positioning, expressed with the proper Marketing Communication Plan.

Matching the theory with the reality of daily business will lead to a positive impact on Narta's performance in the deodorant market, helping the brand to reach its fair position in awareness and image fields while leveraging its sales in this competitive and mature but huge market.

Keywords – Branding, Brand Experience, Brand Awareness, Brand Communication

JEL Classification System:

M31 – Marketing

M37 - Advertising

Resumo

O principal objetivo deste projeto é perceber como uma marca se consegue diferenciar num mercado maduro, tendo como principais vetores a Gestão da Experiência e da Comunicação da Marca. Neste caso, iremos aplicar os modelos conceptuais serão aplicados à marca de desodorizantes Narta, de Garnier. Narta é uma marca presente há dez anos em Portugal no segmento de desodorizantes, comercializada no circuito dos Produtos de Grande Consumo, mas com uma performance estável nos últimos anos.

"*O que as pessoas realmente desejam não são produtos, mas experiências que as satisfaçam*" (Abbot, 1955). Esta citação sublinha a importância crescente da Experiência de Marca e como ela pode conduzir a uma estratégia de diferenciação. Considerando a Experiência de Marca, os conceitos de paridade e semelhança serão analisados e, de modo a tornar possível a diferenciação, o Modelo da Mudança Isomórfica irá permitir gerir as pressões internas e externas que conduzem à paridade e/ou à semelhança. Por último, realizaremos uma breve análise da teoria motivacional de Herzberg para perceber o impacto positivo da diferenciação da marca na dicotomia satisfação/dessatisfação dos consumidores.

Comunicar tal diferença irá tornar a marca mais valiosa e considerada aquando do ato de compra. Combinando a importância do caminho do consumidor em direção à compra com um Plano de Comunicação Integrado, Narta será então capaz de comunicar o seu novo posicionamento e, por consequente, melhorar a sua performance.

Este estudo terá em consideração não só dados de mercado providenciados pela Nielsen mas também dados de comprador e consumidor, quantitativos e qualitativos, providenciados por agências independentes. Estes estudos irão ajudar a inferir acerca da perceção e competitividade da marca, em comparação com as restantes marcas de desodorizantes em Portugal. Em jeito de conclusão, propomo-nos a diagnosticar as razões que estão por detrás da performance estável da marca Narta e implementar um novo posicionamento, comunicado com um plano de Comunicação Integrado próprio. Combinando a teoria com a realidade diária do negócio, o projeto irá criar um impacto positivo no desempenho de Narta permitindo que atinja a sua justa posição em termos de *awareness* e imagem e ao mesmo tempo incrementar as suas vendas neste competitivo, maduro, mas relevante mercado.

Palavras-Chave – Marcas, Experiência de Marca, *Awareness* de Marcas, Comunicação

JEL Classification System:

M31 – Marketing

M37 - Publicidade

1. Table of Contents

1.1. Figure Index

1.2. Table Index

2. Abbreviations and Glossary Index

Table 1 – Abbreviations and glossary index

Abbreviation	Meaning
ACD	Active Cosmetic Division
ARP	*Auto Regulamentação Publicitária*
BEI	Brand Equity Index
CDJ	Consumer Decision Journey
CPD	Consumer Products Division
H&B	Hygiene and Beauty
ICAP	*Instituto Civil da Autodisciplina da Comunicação Comercial*
IMC	Integrated Marketing Communication
KPI	Key-Performance Indicator
LL	L'Oréal Luxe
MS	Market Share
POS	Point-of-Sale
PPD	Professional Products Division
SOV	Share-of-Voice
T2B	Top-to-Bottom
TAA	Total Assisted Awareness
TBA	Total Brand Awareness
TOM	Top-Of-Mind
TSA	Total Spontaneous Awareness
WOM	Word-Of-Mouth

3. Executive Summary

The main purpose of this project is to understand how a brand can differentiate itself in a mature market, having as key drivers the Brand Experience and Brand Communication Management. In this case, these conceptual models will be applied to Garnier's deodorant brand – Narta. Narta is a ten years old brand in Portugal of deodorants, sold in the mass-market circuit and with a flat performance in the last years.
The deodorant market is a very important one in the Hygiene and Beauty (H&B) market in Portugal, especially when focusing the attention in the mass-market circuit where Narta acts. Deodorant is the number two market in terms of value, representing 13% of the total value of mass-market's H&B value. This importance is leveraged with shopper and consumer inputs. It is considered a "must have" category due to high shopper penetration, with 55% of penetration, ranked the third place (after oral care and hair care). In terms of consumer, Portugal is an "hygiene country" since these categories have the highest consumer penetration when compared with European data. Deodorants have in Portugal its biggest consumer penetration rate of 91%, stating the importance of the usage of this category.
With this, the deodorant category gains a critical importance in order to recruit new consumers and leverage L'Oréal's Market Share in the H&B market.
"What people really desire are not products but satisfying experiences" (Abbot, 1955). This quote highlights the increasing importance of experiencing a brand and how it can lead to a powerful and unique differentiation strategy. Regarding Brand Experience dimension, the constructs of parity and similarity will be analyzed and, in order to provide a strong differentiation, the Isomorphic Change Model will help us to guide the management of external and internal pressures that pushes into similarity and parity. At last, a brief look at the Herzberg's motivational theory will be performed in order to fully understand the positive impact of a brand differentiation in the consumers' satisfaction/dissatisfaction dichotomy.
Communicate that difference will make your brand valuable and considered when the purchase act occurs. Matching the importance of the consumer journey with an Integrated Marketing Communication plan, Narta will be able to communicate its new positioning and enhance its performance.
This study will not only take in consideration market insights from Nielsen but also shopper and consumer insights in both quantitative and qualitative ways from independent agencies. These studies will help to establish a proper conclusion about the brand's perception and the brand's competitiveness when comparing with other deodorants brands in Portugal.

From the market competitiveness' analysis, the project states that Narta has an overall good performance, having the competitiveness needed set in terms of ranges, benefits and price, as its competitors. This means that the basic features, the "must haves", are all set. Hence, something else is jeopardizing the brands' performance.

In terms of shopper, the project concludes that Narta has a younger shopper profile than its direct competitors and a considerable gap in the main KPIs when comparing with the three biggest brands in the deodorants market.

When analyzing the consumer, the lack of brand awareness is the first critical point to arise. The market position in terms of sales does not correspond to the ranking of brand awareness or even Brand Equity Index (BEI). This points out the urgent need to create a differentiated image and a more powerful emotional bond with the consumer. Leveraging the brand equity will help to have better consideration of the consumers' and therefore a higher competitive place in the market.

Hence, the project aims to diagnose the reason beyond the platooning performance of Narta and implement a new positioning, expressed with the proper Marketing Communication Plan.

Based on this study, a new Marketing-Mix approach is proposed for the brand with the ultimate goal of leveraging its performance and brand equity, demonstrating the powerful inputs that can arise when the theoretical framework matches the business' reality.

4. Contextualization

After enrolling in L'Oréal Portugal team several challenges arise. Once nominated Product Manager for the Hygiene brands of the Consumer Products Division (CPD), one of the main challenges was finding a way to induce a turnaround for Narta. This ten years old brand in Portugal and market leader in its country of origin – France – was not able to leverage its performance and gain a critical position in the female deodorants market. This study aims to proper identify the touch points to such turnaround and provide a practical solution for the brand in order to gain a proper relevance in the market.

L'Oréal is an international beauty leader founded in 1909 by Eugène Shueller, a chemist with a strong desire for entrepreneurship. It all begun with an armless hair dye sold to the Parisian hairdressers. Since then, innovation and research in the service of beauty and its consumers has been the DNA for the group. More than a pioneer in product conception, Eugène was also a talent in advertising. In 1931, the first building drape was born with the *O'cap* hair lotion and one year later, the first commercial jingle is born with a radio campaign for the same product. Internal innovation and acquisitions dictate the following years. In 1965, *Laboratoires Garnier* are acquired to increase the complementary of offer, namely in haircare, with a set of organic positioning brands. Later in 1980, L'Oréal acquires *LaSCAD*, a French cosmetic society created in 1948. One of *LaSCAD*'s main brands is Narta (created in 1958) and integrated in the CPD division.

Nowadays, L'Oréal is divided in four main divisions. **Consumer Products Division** (CPD) with L'Oréal Paris, Garnier, Maybeline New York and NYX brands, targeting the mass market as main distribution channel. **Active Cosmetic Division** (ACD) with Vichy, La Roche Posay and Roger&Geallet brands that find on pharmaceutics its major client. **L'Oréal Luxe** (LL), house of the luxury designed brands in perfumes, make-up and skin care such as Yves Saint Laurent, Giorgio Armani, Diesel, Khiel's and Lâncome. And at last, **Professional Products Division** (PPD), the mother-home of the group, selling to hairdressers worldwide with iconic brands such as L'Oréal Professionnel and Kerástase.

Since 2016, the cosmetic market is being able to grow, presenting a growth rate of +4% in 2016 according to L'Oréal's Financial Report (2016). However, Western Europe (where Portugal is) presents, a higher growth rate of +19.3%. When splitting by categories, it is possible to observe a skin care market at +36.3%, hair care at 22.9%, make-up at 18.2%, fragrances at 12% and, at last, hygiene market less accelerated at 10.5%. Worldwide, L'Oréal is the number one player with 28.02B$ followed by Unilever 20,47B$ and Procter&Gamble with 17.60B$ of sales.

CPD is the biggest worldwide division responsible for 48.1% of the group's sales, followed by LL (30.1%), PPD (13.6%) and ACD (7.5%).

Focusing on Garnier, this 1904 founded brand, is the second largest brand in the group, present in four categories and seven areas of expertise, offering innovative and affordable care solutions to every man and woman worldwide. Narta in Portugal is under the Garnier umbrella brand strategy but in its native market, France, is considered an independent brand with no association to Garnier.

Present in the Portuguese market since 1997, Narta has had an interesting role in the H&B market being one of the responsible for the increasing penetration of Garnier brand in the H&B market. However, since 2010 has not been able to gain enough market share to consolidate is position as a relevant brand in the female deodorant market.

This project will follow the history of Narta as well as a present diagnostic of the performance in order to create a new marketing and media mix.

Having in mind the studies of Peter & Olson (1996), creating awareness around a brand is a key fact to enhance customer experience. The absence of awareness will block the purchase and consideration of the customer, just because they simply do not know about the brand. Also, according to Aaker (1997), brand awareness, when influenced by ad recall, affects the purchase decision not only in matters of behavior but also in cognitive and affective aspects. These attitudes towards a brand will lead to purchase and as a consequence, a stronger market share. This highlights a major area to investigate while planning this diagnostic.

Being in the market for ten years, Narta has a flat **Market Share** (**MS**) (between 13% to 14% of the female deodorant market). Also, L'Oréal owns data stating a low awareness in the deodorant market. In an IPSOS study called U&A (2015), ranking total brand awareness in the female market, Narta ranks the 7th place, even behind Sanex and Vasenol that have considerable less market share. Shocking, half of the sample does not associate Narta to the deodorants category – the only one where it is present.

For this specific topic we will analyze the construct of Brand Experience, where the consumer and shopper finds the unique value proposition of the brand or if a situation of parity or similarity is faced with other brands. Furthermore, the Isomorphic Pressures Model of Rahman (2014) will help us to conceptualize where the main sources of similarity from Narta arise. At last, the concept of satisfaction will help us to understand if the gap between market share and awareness arises from the lack of performance (dissatisfaction situation) or from a lack of added-value to the consumer (absence of satisfaction situation).

Hence, the lack of awareness can arise from the lack of a unique value proposition but also from a bad competitive dynamic (in either promo, distribution, shopper profile or consumer profile). On the other hand, the deodorant market is the third H&B market in terms of media investment (OMD, 2016). In this case, the presence of the brand in the media ecosystem should be analyzed and it is a direct result of the brand management strategies.

According to the conceptual model of Brand Communication developed by Taichon & Quach (2016), brand awareness, brand personality and brand image are under direct influence of the brand manager and are a result of its advertising and sales promotion strategies.

Important here to analyze the awareness, personality and image of the brand since it has a direct impact on the customer expectation, satisfaction and decision journey,

In order to have a practical input for the management of the brand it is key to build an **Integrated Marketing Communication** (IMC) plan that tackles the consumer in its complex and non-linear path-to-purchase, having as the ultimate goal the increase of sales and as a consequence market share for Narta. In this topic, the model of Batra & Keller (2016) will appear as a background that aims to "increase the effectiveness and efficiency of the marketing communication programs".

Aiming to find the right brand equity to Narta we will construct a strong literature review on this topics and then elaborate a conceptual framework that can help to build a powerful brand in this mature market.

To conclude, having the diagnostic completed, the current project proposes some adjustments to the current marketing-mix in order to fully express the new brand approach. Product, Placement, Price and Promotion will need to consider the changes that arise from the match between the conceptual framework and the data analysis.

This match will induce a better competitive performance and to take Narta out of its flat performance, raising its arms towards a new branding strategy.

By doing so, Narta will be able to disrupt its market approach and gain its deserved place in the deodorants' mature market.

5. Literature Review

5.1. Brand Experience

More than half a century ago, it was already stated "*what people really desire are not products but satisfying experiences*" (Abbot, 1955). Nowadays, non-functional experiences are gaining more and more relevance when choosing a product/brand/service. In fact, consumers are more aware to the experiential benefit as opposed to functional differentiation (Ismail *et al.*, 2011). The focus on customer experience arises from these new interactions in the brands' multiple touchpoints and it induces more complex consumer journeys. The experiences are more social, deeply influenced by peers and other numerous factors that are over the limit of control of brands (Lemon & Verhoef, 2016).

This leads to an increasing importance of the areas of **Brand Experience**.

According to Brakus *et al.* (2009) **Brand Experience** is defined as "*subjective, internal consumer responses (sensations, feelings and cognitions) and behavioural responses evoked by branded-related stimuli that are part of a brand's identity, packaging, design, environments and communications*'".

Consumers have multiple touch points that match the importance of a complete, coherent and integrated Brand Experience. Brand Experience starts in the simple search of products/services extends to the consumption and shop of the product or the use of the service and goes further to the after-service elements (Brakus *et al.*, 2009).

According to Chattopadhyay & Laborie (2005) the experience of a brand has multiple touch-points such as sales force, media, sponsorships, word-of-mouth, digital media and reviews, point of sale and the product itself.

Brand experience is clearly a multidimensional model with different variations of experiences: sensorial, affective, cognitive, physical and social (Schmitt, 1999).

Brand experience must be analysed as a continuous scale both in a positive/negative dichotomy, called intensity, but also in valence meaning it can vary in both ephemeral/long lasting range (Zarantonello & Schmitt, 2010).

5.1.1. Brand Parity and Brand Similarity

According to Labrecque & Milne (2013) brand managers draw and implement strategies with the goal of achieving brand differentiation so that the brand can provide a unique experience to its customers. Despite this effort and the work of the different brand managers, **Brand Parity/Brand Similarity** exists in many categories of the different markets. The consequence is that customers will not be able to distinguish our brand among the different competitors and therefore expect similar brand experiences from all the competing brands.

The differentiation is a key achievement to be able to effectively compete in a market (Ehrenberg *et al.*, 1997), being in the words of Kottman (1997) "*the sine qua non of successful marketing*".

However, Brand Parity and Brand Similarity are not the same concepts.

Brand Parity refers to the overall perception of the consumers that the differences among the brands of a specific category are small (Iver & Muncy, 2005).

Brand Similarity relates to the evaluation of the relation between two brands' values either as similar or different causing the consumer to evaluate two brand as relatively similar or relatively dissimilar (Bijmolt *et al.*, 1998).

When both concepts arise together, in a specific segment among its different brands, consumers will perceive no difference/differentiation among the brands. The more mature a market is the more probable it is to fall in a situation of brand parity or brand similarity. With the passage of time, brands will copy the successful strategies of other companies in an innovation imitation process (Levitt, 1966).
In the deodorant market, these concepts gain an increasing relevance. It is not possible to reach disruptive innovations in product functionalities. Or at least, the presence of new ingredients and formulas will fit in the current customer needs, since 98% of them consider to be satisfied with the current deodorant (Source: IPSOS U&A, 2015). Every brand in the market has its own "Black and White" or "Invisible" ranges addressing the main need benefit of the consumer. This makes it harder for Narta to reach its differentiation.

Concluding, the forces towards brand parity and/or brand similarity are considered to be high in the deodorant market and for that matter, play a significant constraint when thinking about the next steps for Narta.

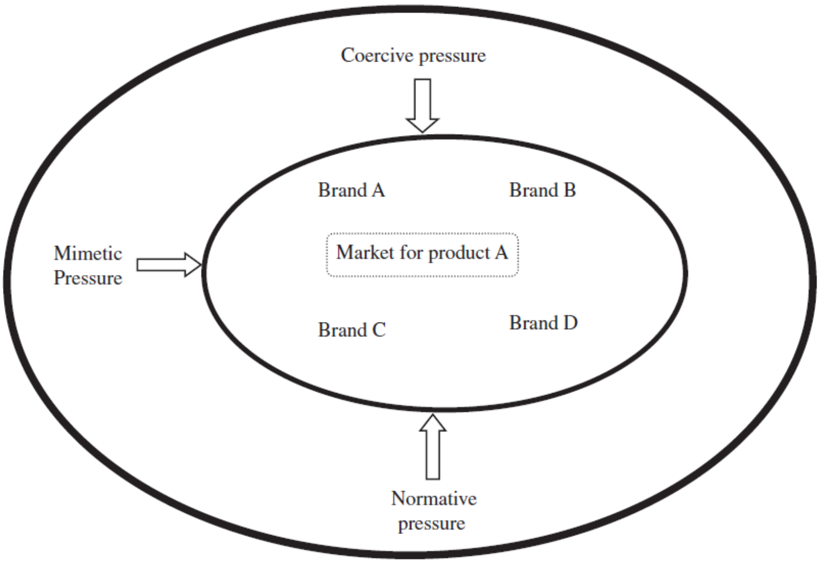
5.1.2. The Isomorphic Change Model

DiMaggio and Powell (1983) developed the model of **Isomorphic Change** based on the concept of institutional isomorphism that states that the efforts to deal in a rational way to the uncertainty and limits often lead to a homogeneity process.

Translating this process to the companies and brands' reality, the growth process will be followed by this homogeneity process. In the early life, the launch step, the innovation is key to make a statement to the market, even with similar offer (products or services) the approach will be tremendously different. As time goes by and the market starts to mature, the diversity will disappear and the isomorphism will settle, as companies fail to differentiate and start copying the successful strategies of the market/competition. This is the current status of the deodorant market – a mature market, with lack of functional differentiation among its brands.

Isomorphic Change can be separated in three different ways – **Figure 1**.

Figure 1 - The Isomorphic pressures that lead to brand parity/brand similarity



First, **Coercive Isomorphism** arises from the formal and informal pressures from other companies and even from cultural aspects and expectation from the society. As it can expected, this pressures are mainly external ones that come from the market itself, the competition, customers, suppliers and regulation. Even the packaging and labelling of a product consists in a coercive pressure (Heckman, 2005). For instance, starting in 2018, the use of "no parabens" expression on pack will be forbidden, inducing changes in all H&B players. In Portugal, all the communications are supervised by ARP – *Auto Regulamentação Publicitária* (former ICAP - *Instituto Civil da Autodisciplina da Comunicação Comercial*). The ARP is responsible for the self-regulation of the advertising market. Brands cannot argue the importance of this institute in providing true, honest and transparent communications to consumers, inducing credibility to the different markets and its brands. However, the compelling effect of having different brands' communication defined in a certain way can increase the difficulty of achieving brand differentiation. Other effect is the usual "expected to be" that arises from cultural expectation on a specific approach. An example, all the water labels are blue, as a symbol of trust and confidence (Singh, 2006). Specific to this project, all deodorant communications are focused on the functional benefit expressed in the application of the product in the armpits. The increase of competition (arising from this and other factors) leads naturally to a higher competitive intensity and naturally, to an overlapping process that induces brand similarity and/or brand parity.

Secondly, **Mimetic Isomorphism**, in the other hand, arises from the environmental uncertainty that is also of factor leading companies to copy the successful ones operating under the same competitive conditions. This often happens in times of disruptive innovation where a pioneer company launches the disruptive concept and the others might follow their actions.

Lastly, **Normative Isomorphism**, that comes from the professionalization of brand managers that define the conditions and methods of their work having as a base university and training institute's inputs that are similar among the class of professionals. According to DiMaggio & Powell (1983) different kind of employees might be different among their own inside the same company but similar to their pears among other organizations.

5.1.4. Herzberg and the Satisfaction Theory

Herzberg is one of the most important names in Psychology due to its work regarding motivation theories'. Father of the two-factor theory of job satisfaction, Herzberg is constantly quoted when regarding organizational topics on motivation. The theory is quite simple: satisfaction and dissatisfaction are not two extremes on the same scale but two different and independent scales that have different "pain points" – hygiene factors (reaching more or less dissatisfaction) and motivators (leveraging more or less satisfaction) (Herzberg *et al.*, 1959).

When facing a parity/similarity market, customers fail to distinguish among brands. This means that the consumption of the brand becomes a "hygiene factor" but not necessarily satisfied with a unique brand experience. If the experience fails to reach the expectation of the consumer, dissatisfaction happens leading to negative brand experience (Maidani, 1991).

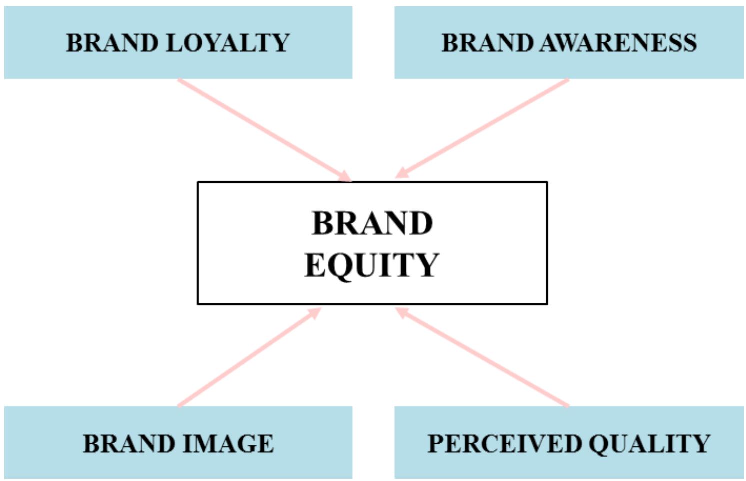
5.2. Brand Communication Management

5.2.1 Awareness, Personality and Image

Turbulent times and increased competitiveness induce an extra importance to customer loyalty and customer conquest. An important focus on brand management is to be able to retain customers even with major changes both in the environment and in the brand itself.

Aaker (1991) defines several dimensions of **Brand Equity** such as **Brand Loyalty**, **Brand Awareness**, **Brand Image** and **Perceived Brand Quality – Figure 2**. From the consumers' perspective, a higher **Brand Equity** creates positive reactions, evokes familiar but strong associations and builds trust and loyalty (Keller, 1993).

Figure 2 - Brand Equity construction.



Brand performance can improve with the loyal customer fuel. These ones can give higher profit from a higher re-purchasing probability, less price sensitiveness, more positive word-of-mouth and a lower switching probability (Reichheld & Sasser, 1990). Higher Brand Equity can act as trigger to positive brand associations and therefore make it easier for the consumers to evaluate and even buy the brand (Keller, 1993).

For the loyal and less-loyal, current or new consumers, brands are always striving for attention from their customers in detriment of other brands. The goal is not only to capture the consumer attention but also to make them choose our brand in future purchase situations (Grossmanova *et al.*, 2009).

When looking for the promotion-mix, **Marketing Communication** has a deeply important role.

Advertisement is one of the components and plays a special role on targeting the market. Belch & Belch (2004) defined advertisement as any paid form of communication about the brand, product or idea by an identified sponsor. The evolution of humankind induced different forms and means to brands to advertise effectively.

Marketing Communications can either be on traditional media – television, newspapers, radio, outdoor, sponsorship, public relations, packaging, point of sale -, or online media – website, blogs, social network, programmatic, display, e-word-of-mouth (Thaichon & Quach, 2013).

Brands can use advertisement in order to build Brand Image and Brand Personality while leveraging Brand Awareness due to higher brand exposure (Chen & Green, 2009). As stated by Grossmanova *et al.* (2009) the elements of marketing communication, namely advertisement, can have an important and direct impact on brand image, personality and awareness. Also, when having in mind the importance of brand awareness in this equation, marketing communication assume a lead role (Keller, 2009).

In the market we are analysing other marketing communication element arises and need to be restated.

Deodorants' market is a very promotional and price driven market (IPSOS, U&A, 2015). According to Buil *et al.* (2013), sales promotions can have a negative impact and jeopardize brand equity even when having a short-term positive effect on the consumers and on the brand performance itself.

This complex equation fits on the role of a brand manager in an effort to shape the brand communication strategy that is able to deliver messages that can generate brand awareness, personality and image leading to customer expectations when exposed to the brand and ultimately to loyalty and brand performance leverage (Rhee & Johnson, 2012).

Brand Awareness can assume the forms of promotion, price, distribution, product features, brand name or brand personality (Keller, 1993) and it is related to the knowledge from the consumers about the existence of the brand, recall and recognition towards the brand and its products (Huang & Sarigollu, 2012). It can be created by a repeated exposition to the brand and an increase association to its product category (Keller, 2009).

A brand with high awareness has a more positive image and leads to a customers' favourable reaction to its marketing actions (Keller, 1993).

Brand Personality is defined as the characterization of a brand with human characteristics and emotions such as modern, fun, innovative, outgoing, in order to display a brand (Aaker, 1997). This leads consumers to identify themselves, or not, with the brand and a possible wish to use the brand as an extension of their own (Rhee & Johnson, 2012).

Hence, brand personality can induce a positive outcome on the attitude and preferences of the consumers towards the brand helping the brand to differentiate itself from its competitors (Rhee & Johnson, 2012).

According to Aaker (1997), brand personality is created over time thanks to the communication mix and its different variables such as media, pack, price, logo, store location, store communication, word-of-mouth, digital signature and other touchpoints.

Brand Image is, according to Keller (1993), a set of associations in the consumers' minds about a brand and its products, being a sum of memories (functional, emotional, and others). It is not a property of the company but something that transcends it and finds it place on the consumers' mind and shapes their expectations. It can be created by the direct communication mix but also by the indirect contact of the consumers with the brand (Shank & Langmeyer, 1994).

Summing up, the consumers' expectations arise from their perceptions. These perceptions are, therefore, built with a direct or indirect contact to the brand's marketing communication mix that creates the brand image, brand personality and brand awareness.

The expectation of the consumers' is therefore built by assumptions about the product performance, the belief, or not, in a brand promise (quality, effectiveness, simplicity and so on), judgements arising from previous experiences and word-of-mouth (WOM) (either good or bad). WOM itself is also shaped by the perception that is built by the brand image, brand awareness and brand image in the consumers and their desire to share it with others. (Shank & Langmeyer, 1994).

According to the work of McDonald *et al.* (1994) consumer satisfaction is related to their expectation. Consumer Satisfaction is hence defined as a cognitive evaluation of a brand or product and its ability to match the expectations (Cronin *et al.*, 2000).

5.2.2 In-Store Branding: How to Drive Awareness?

Today's retail ecosystem is packed with complexity. A set of in-store stimuli that arises from the packs to the digital and engaging displays, new in-store advertisement and even screaming out loud promotional offers (Shukla & Banerjee, 2013). In **Figure 3** an example of the new possibilities in in-store branding maximization is shown.

Figure 3 - In-Store branding maximization examples.

Matching this complexity with an increasing number of consuming decisions that are made in-store induces the need to give a brief look to the brand presence in-store and how it can be maximized.

The proliferation of brands and products make it hard for the consumers to make purchase decisions based only on brand preferences, reducing the importance in some categories of the brand. However, the in-store promotions and expressions are inducing higher levels of consumers' attention and offering an extra, direct and important inducement (Ailawadi *et al.*, 2009).

According to Parker & Tavassoli (2000), the presence of elements that grab the attention of the consumer in-store (displays, offers, linear merchandising) can induce a positive affective appraisal among them and even influence the brand image perception and price consciousness.

As brands are gaining an increasing importance inside organizations, being seen as one of their most valuable assets (Aaker, 1991). For retailers as well, brands are also a key element of their assortment.

According to Ailawdi *et al.* (2009) brands provide several advantages to the retailers: they generate better margins, have a better promotional uplift, are more effective when analysing the drive-to-store performance and helps to attract and retain customers.

5.3. Integrated Marketing Communication

The new competitive outlook of the markets has a great impact on the consumers' path to purchase as it is acquiring a completely different conceptualization nowadays with different lengths, less hierarchical and also more complex decision processes (Court *et al.*, 2009).

The information is no longer absorbed in a passive way only in mass media, like television or press for later use. In contrast, consumers actively look for information when needed, either in search engines, social media, friends' profiles or blogs. In sequence, brands need to find new and more powerful means to move consumer quicker and more efficient along their decision funnel, their path-to-purchase (Batra & Keller, 2016).

Consequently, **Media Mix** acquires new and more decisive roles since the cross-effects and the interaction mixes among the media means is proved (Joo *et al.*, 2013). The good combination and integration of the different marketing communication tools is key to drive short-term sales and also long-lasting construction of brand experience (Osing *et al.*, 2011).

All touch points by which a brand targets and impacts consumers from the implicit means, like product features and design but also point-of-sale expression, to the explicit ones that arise from advertisement are part of the **Integrated Marketing Communications** (Batra & Keller, 2016).

A well-integrated marketing communication plan must have three main characteristics, according to the studies of Batra & Keller (2016):

(1) **Consistency**: reinforce of the message in different ways and means across the macro-plan in order to facilitate the absorption of the message while inducing action with a core-persuasive message;

(2) **Complementarity**: be able to reach the different information needs by completing the different media tools maximizing their advantages while reducing their weak points providing each communication option a different but complementary objective to leverage consumers' persuasion, build brand equity and drive to sale; and,

(3) **Cross-effects**: consider also a path-to-media where the correct over-time exposure to different communication options can enhance consumers' purchase intention.

Only when combining these three characteristics, a strong and impactful marketing communication plan is possible. The importance of these concepts is maximized when considering the growth of the advertisement possibilities and brand competitiveness in the H&B markets.

5.3.1. Integrated Marketing Communication (IMC): Capability & Performance

According to Peteraf & Barney (2003), there are two main areas regarding Marketing Capabilities. The first comprehends a set of capabilities associated with the **Marketing Mix** processes (product development, distribution channel management, among others). The second concerns the capabilities regarding the **Processes of Marketing Strategy Development and Execution**. This set is evaluated as valuable and nonsubstitutable so it might become a source of competitive advantage since it can lead to better performance when explored correctly by the organization and, moreover, it can become difficult to replicate by competitors.

IMC is itself a marketing capability since it combines tangible and non-tangible inputs and transforms them in outputs. Also, is related to the marketing placement mechanism that allows the optimization of communication leading to better effectiveness and several other benefits from the financial to brand performance (Luxton *et al.*, 2015). The practical effects arise in better performing campaigns.

In addition, considering that IMC influences the effectiveness of the brand's communication advertisement and therefore the brand equity related factors such as brand awareness, brand image and brand loyalty, it gains a special outlook in the subject of this project (Luxton *et al.*, 2015).

Again, it is possible to question whether a brand is truly an asset of the organization. The studies of Ambler *et al.*, 2002) state that **Brands** are able to offer value to the organization in terms of an increased perceived quality, credibility and trust, emotional attachment to the organization and also a greater motivation of the consumers to acquire and re-buy the organization's brands. In order to build this stronger brand it is need an ongoing effective marketing communication strategy that allows the market to see, hear and spread the brand, hence unlocking the brand development and creation of long-term value (Luxton *et al.*, 2015).

Matching the two last concepts, **IMC** presents several advantages when it is developed as a brand's capability.

It helps the organization to focus their resources, starting the brand construction journey from the consumer, rather than in prospects of whom and it brings to the marketing and communication elements a credible, persuasive and meaningful layer that can also be evaluated in terms of effectiveness and efficiency. Also, it encourages coordination in all the communication activities and, finally, helps to the effective use of resources (external) and capabilities (internal) to reach the best results (Ratnatunga & Ewing, 2009).

Putting into practice, **IMC** is the process through which a brand is able to apply its knowledge with the ultimate goal of combining and transforming tangible assets (outdoor and point of false, for instance) and intangible ones (like brand identity and slogans) into performance outcomes, either direct or indirect, such as **Brand Equity** and **Sales**. It does not need to be something placed in an outstanding way to be valuable. Performing at the acceptable level and providing unique brand advantages is the ultimate goal and reason of this valuable capability.

A note from the studies of Ratnatunga & Ewing (2005): the greater the match between the marketing communication assets, placing the tangible and intangible ones in synergy, and improving the "opportunity to see" of the consumers' will leverage the effectiveness of the advertisement strategy in the lights of an IMC plan. The power of the brand is, then, partially a function of the effectiveness of this communication strategy and the responsiveness of the target to it.

In order to provide the expected competitive advantage from IMC it needs to be **VRIN: Valuable, Rare, Inimitable and Nonsubstitutible** (Barney, 1991). **Valuable** due to the benefits it confers to the communication strategy (effectiveness and better targeting). It is **Rare** since it is embed in each company with different configurations having a potential to be unique. In contrast, it can be **imitated** but at a great cost due to diseconomies of duplication. In addition, it can be **substituted** with different marketing and communication orientations. However, it will negatively arm the brand's financial and effectiveness of communication, not leading to the creation of a strong equity.

Summarizing, IMC might not be a source of sustainable competitive advantage alone but can lead to several temporary advantages. An important outlook from the studies of Makadok (2001), claims that a capability, that is different from a physical resource, can increase their efficiency with regular use and deployment (instead of the resource's usual depreciation). Hence, brands that implement an **effective IMC capability** will leverage their growth becoming a moving threat to its competitors, a difficult target to reach and with that creating a more sustainable competitive advantage.

Summarizing, the study of Luxton *et al.* (2015) helped to understand the importance of this construct in the brand equity construction. First, the brand's IMC capability leverages brand performance by helping to create and implement more effective campaigns inducing a positive market performance and market share outcomes. Second, the implementation across time of IMC campaigns will create better and better outcomes to the brand's financial performance.

5.3.2. Integrated Marketing Communications: Effective Impact throughout the Consumer Decision Funnel

Taking in account the work of Court *et al.*, (2009), the **Consumer Decision Path** acquires, in opposite to the traditional linear one, a circular journey that begins with a preliminary brand consideration, the change of this consideration according to the information gathered and evaluated, brand selection (purchase moment), and next-step decision with the after-buy experience.

Before this entire journey, there are increasing complex, long and interactive processes maximized with the digital media-mix (search either organic or paid, price comparisons, website visit, display and social network ads) and also with the point-of-sale experience, all this before the moment of conversion to buy (Anderl *et al.*, 2014).

Even with this non-linear path mixing with cross-media impacts it is still possible to define some go-through steps that consumers go in order to engage with a brand.

Keller (2016) defined the **Potential Stages in a Consumer Decision Journey (CDJ)**:

(1) Feel a need or want in a category level;

(2) Knowledge about it – recall of the brands associated with the category need (enough brand awareness both in terms of recall and recognition);

(3) Considers it actively by evaluating a small subset of brand inside the category in both performance and trustworthiness' dimensions (examination of benefits and attributes);

(4) Information search, learning process and critical evaluation developing a preference (brand knowledge construction);

(5) Like, trust and confidence in the brand (strong, unique but also favourable associations of both functional and non-functional brand attributes);

(6) Will to pay (more) for the brand or product (increased perceived value based on the complete set of benefits including functional and emotional ones);

(7) Higher desire to act by choosing a soon trial moment with the where, when and how;

(8) Consumption moment;

(9) Positive evaluation (satisfaction);

(10) Loyalty and buying repetition;

(11) Engagement and interaction with the brand (participation in online and offline brad activities); and,

(12) Active advocacy of the brand (online with social media but also offline).

At any step, failure can occur with a rejection of the brand and a stop in the path (from the ignorance of the brand's existence to a bad experience with the brand).

In each step there are particular information processes in our consumers' mind and therefore more and less adequate media tools to induce the fulfillment of consumers' needs, helping them to proceed to the next step of the journey.

We can hence summarize some of the different tools and how they can help in the purchase-path.

First, regarding the **Traditional Media,** that still plays a critical role in the integrated marketing communication strategy. Is still a great tool for creating brand awareness, interest and consideration, it increases the consumer knowledge on the brand, product or features and plays a key role in persuasion when having a structured creative construct (Barroso and Llobet, 2012).

An interesting research by Gopinath *et al.* (2014) concluded that the message (emotional or functional but present in the copy or creative outline of the ad) is usually more important than the average number of repeated impacts on the same target highlighting the importance of the message rather than the "noise" it creates.

The mix of this means is crucial when considering the investment towards the brand's goal. For instance, mixing television and radio can leverage the brand's recall and improve the positive attitude of the consumers (Naik & Raman, 2003). Advertising and price promotions when placing together induce better sales' elasticity (Lemon & Nowlis, 2002).

Second, the more recent **Online Media Tools** present different windows of opportunity to create personalized messages and multi-mean impacts.

This type of media allows a more targeted placement of messages even in third party websites, the optimisation of the message with search-engine inputs and customize message to the audience considering their purchase journey (Batra & Keller, 2016).

Some examples: regarding search ads they are important to increase the click-through rate (CTR) in the brands' websites and also important to target consumers that, because are searching less popular terms and spending more energy in the search process, are closer to purchase (Berman & Katona, 2013). Display advertisement can also lead to positive KPIs to the brands' website in the several stages of the consumer purchase path but can have a low performance in re-marketing previously impacted consumers so the targeting strategy must privilege the non-visitors of the brand website (Hoban & Bucklin, 2015).

Even the brand website is a powerful marketing tool since it might be the landing page of the whole marketing campaign and, according to Hauser *et al.* (2009) it will have better KPIs if the website matches the consumers' cognitive style (if the consumer is more emotional that website should be constructed with this tone-of-voice and set with this characteristic on mind even when considering colours).

A brief note to the importance of having a subscribing field on the brands website in order to build a consumer database and be able to retarget them with personalized messages.

At last, the field of social media offers numerous possibilities when constructing a marketing campaign. Besides that, three key characteristics should be considered on firm-generated content – **valence, receptivity and customer susceptibility** – that can positive influence our consumer spend, cross-buy and profit (Kumar *et al.*, 2016).

This complexity of online media gives rise to the importance of the right mix and the right match between the different means and messages. The growing importance of social media should also not induce this mean as the only vector of advertisement since it still has some limitations.

It is not as effective as traditional media in recruitment of consumers or in increasing brand penetration, it has lower engagement rates in consumer goods' (in comparison with fashion, charity for instance), and, at last, there is a must smaller amount of consumers willing to engage with branded-content reducing the changes of creating a two-way communication between brands and consumers (Batra & Keller, 2016).

Hence, there are also positive synergies when mixing both offline and online media since they can interact and address different stages of the consumers' path to purchase. For instance, firm-generated content in social media can positively influence the attention towards the traditional television advertisement (Kumar *et al.*, 2016). Other example, emotional-oriented construction of advertisement can drive to electronic Word-of-mouth recommendations and therefore into sales.

In order to analyse the construction of media-mix across the consumer journey is important to differ the type of media into **Earned, Owned and Paid**.

Earned media is the future goal for companies since it consists on having free but reliable information arising from word-of-mouth or press coverage. **Owned media** in contrast arises from the brands' controlled media like their website, social media profile and mobile application. Last, the **Paid media** consists on the traditional and online media placement. (Batra & Keller, 2016).

It is key to consider the importance of motivation, ability and opportunity of the consumer to process any kind of communication.

This has a great impact on the outcome of the Media-Mix and also in the intensity and direction of the media processing (Batra & Ray, 1986). The absence of these three factors – motivation, ability and opportunity -, the process of the message by the consumers can be weakened or even not occurring.

Have in mind that both **motivation** and **ability to process information** are at the consumer level but the opportunity is a concrete output of the media-mix strategy (Batra & Keller, 2016).

According to the brands' objective, different means and mixes should be considered (consider the information presented in **Table 2**) (Batra & Keller, 2016):

Table 2 – Likely Communication outcomes from different communication options.

	Communication Options										
Communication Outcomes	TV	Promos	Events	PR	Social Media	Website	Search	Display	Mobile	Direct	Selling
Create awareness and salience	+++	++	++	++	+++	++	+++	+++	+++	++	+
Convey detailed information	+	+	+	+	++	+++	+	+	++	+++	+++
Create brand imagery and personality	+++	++	++	++	+++	++	+	+	++	+	+
Build trust	+	+	+	+++	+++	+	+	+	++	+	+++
Elicit emotions	+++	++	+++	+++	+++	++	+	+	++	+	+
Inspire action	+	+++	+	+	+	++	+++	++	+++	+++	+++
Instill loyalty	++	+	+	+	++	++	+	+	++	++	++
Connect people	+	+	++	+	+++	+++	+	+	+++	+	+

Notes: +++ = greatest influence; ++ = medium influence; + = least influence.

Each of the communication outcome, meaning the goal behind the marketing communication strategy, can have more or less influence, according to the media-mix choices, as we can verify in the table XX. The correct match of the communication options will help to maximize the brand's impact on the Consumers Decision Journey, increasing the consideration and, as a consequence, the market performance of the brand.

A brief explanation on the **communication outcomes** as brands' communication goals.

(1) **Create awareness and salience** – Goal to ensure a salient brand by placing it at the right time and in the right place.

(2) **Convey detailed information** – After creating the awareness base, the brand must convince its customers about the advantages of choosing its products. It is about persuading them about the brand performance. It's key to have a correct identification of the "proof points" either being product features or brand attributes.

(3) **Create imagery and personality** – Successful brand must have a balanced mix of tangible and intangible assets. The imagery should be created having in mind our target's usage of the brand (where, when, how). On the other hand, the personality must express the human characteristics that our consumers attribute to the brand and influence them to view themselves inside our brand forming a strong bond between them.

(4) **Build trust** – Credibility and trust are the elements that will allow the consumer to process the message after receiving it. The lack of these elements can lead to a simple brand delete from the consumers' mind.

(5) **Elicit emotions** – Has the goal to increase the perceived brand value thanks to the usage of emotional, social and symbolic benefits to the functional ones increasing the purchase motivation.

(6) **Inspire action** – After receiving, processing and accepting the brand information, the brand might be able to shape the brand preference but not yet the action to buy. Hence, the type of message should induce action to the customers that already have a favourable disposal of the brand.

(7) **Instil loyalty** – Key after the purchase moment in order to assess the satisfaction level, the fulfil of the previous expectations and desired experience. All this can be influenced by the brand's communication.

(8) **Connect people** – A positive experience can lead to repurchase and even loyalty. However, it might not lead to the dreamful world of advocacy. In this step, the goal is to engage and interact with the consumers in a symbolic and emotional matter creating the desired "love brand" idea.

These steps will assist the definition of a strong media-mix that helps the customer to drive alongside its consumer journey into buying a specific brand.

5.5. Communication Matching Model

Taking into account the importance of communication outcomes as well as their match with the consumer decision journey, the **Communication Matching Model** allows the match between each media option effects and the communication objectives of the brand (Batra & Keller, 2016).

Consider the following **Table 3** and **Table 4** that match the communication needs and objectives and also the communication option with the steps of consumer journey.

Table 3 – Communication Needs and Objectives at different stages of the CDJ.

Decision Journey Stage	Communication Needs and Objectives							
	Awareness	Information	Imagery	Trust	Emotion	Action	Loyalty	Connect
Needs	+++	+++	+	++	++	+	+	+
Is aware	+++	+++	+	+	+	+	+	+
Considers	+++	+++	+++	++	+	+	+	+
Learns	+++	+++	+++	+++	+	+	+	+
Likes	++	+++	+++	+++	+++	+	+	+
Will pay	++	+++	+++	+++	+++	+	+	+
Commits	++	+++	+++	+++	+++	+++	+	+
Consumes	+	++	+++	+++	++	+++	+	+
Is satisfied	+	++	+++	+++	++	++	+++	+
Is loyal	+	+	+	++	++	+++	+++	++
Engages	+	+	+	++	++	+++	+++	+++
Advocates	+	+	+	++	++	+++	+++	+++

Notes: +++ = greatest influence; ++ = medium influence; + = least influence.

Table 4 – Likely Communication Outcomes from Different Communication Options.

Research Propositions Concerning Likely Communication Outcomes from Different Communication Options

Communication Outcomes	Communication Options										
	TV	Promos	Events	PR	Social Media	Website	Search	Display	Mobile	Direct	Selling
Create awareness and salience	+++	++	++	++	+++	++	+++	+++	+++	++	+
Convey detailed information	+	+	+	+	++	+++	+	+	++	+++	+++
Create brand imagery and personality	+++	++	++	++	+++	++	+	+	++	+	+
Build trust	+	+	+	+++	+++	+	+	+	++	+	+++
Elicit emotions	+++	++	+++	+++	+++	++	+	+	++	+	+
Inspire action	+	+++	+	+	+	++	+++	++	+++	+++	+++
Instill loyalty	++	+	+	+	++	++	+	+	++	++	++
Connect people	+	+	++	+	+++	+++	+	+	+++	+	+

Notes: +++ = greatest influence; ++ = medium influence; + = least influence.

Considering now the different stages of **Consumer Journey** previously explained, it is key to have a brief overview of the match between the journey and the best suitable **Communication Option** for each step, having in mind the research of Batra & Keller (2016).

(1) **Feel a need or want in a category level** – In markets where there is a big and main player, the goal can be to recruit to the category and make it grow. In others, it can be to awake the need of the specific category in consumers' life. In both cases, targeted ads, paid search ads and third-party website display ads and promote the category awareness and the desire to find out which brands can best fulfil the now identified need.

(2) **Knowledge about it** – In this step the consumer has a high motivation and desire but lacks the cognitive ability since (s)he is not into deep search of the brands. Therefore, the brand manager goal is to induce a high visibility of the brand in organic and paid search, retargeting strategies and social network posts. Also, traditional advertisement plays an important role here by creating great awareness due to higher share of voice and even positive user-generated content.

(3 & 4) **Considers it actively & Information search** – Consumers are likely into deep search to find detail information so the brand website is key to match their information needs. Matching it with persuasive digital content in Youtube and disruptive television ads, word-of-mouth (online of offline) and ad placement in third-party websites can really leverage the brand's performance in these stages.

(5) **Like, trust and confidence in the brand** – The brand's claim is put to test since consumers are throughout time more suspicious about them and are willing to search to prove if true or not. For that, endorsements and testimonials can be the key to provide an overall trust and confidence about the brand and reducing the purchase anxiety.

(6) **Will to pay** – The main goal of the brand at this step is to state that the payed price is "fair", competitive, reasonable and even less than the real one that the brand is able to deliver. This can be done to emotional and social appeal integration by associating to the brand's message the desired feelings and values. For that, high-prestige events, celebrity presences and social network posts (for instance, Youtube videos and Facebook posts) can help the brand to stamp a fair price in the consumers' mind.

(7) **Higher desire to act** – The communication must clearly drive to action, knowing where the product is at with an acceptable price and confidence. Messages about the retail location or limited-time promotions through owned media (brand website, social networks profiles and brand's app) and even paid media (promoted posts for instance) are key to match the consumers' needs at this stage.

(8) **Consumption moment** – Being this the consumption moment the communication is led by the consumption place.

(9 & 10) **Positive evaluation & loyalty and buying repetition** – Only with high satisfaction this might occur. Always on communication, however, can convince the consumers about the good brand performance and the match with their reasonable expectations. Post-purchase email marketing, retargeting media ads and social media engaging posts can help to increase the positive sentiment and lead to an increase frequency and amount of consumption.

(11 & 12) **Engagement and interaction with the brand & active advocacy of the brand** – Brand must facilitate the recommendations either on social networks but also in the brand's website (review field for example). The opportunities for WOM will be taken if the consumers real evaluate the brand as a loved one. For that the communication should be implemented with deep meaning and with symbolism (target the consumers' life, values, identities and aspirations by using emotional, authentic and close to consumer messages).

Matching these paths is the true meaning of an **Integrated Marketing Communication Plan**, where the coordination and consistency of the means by which we inform, persuade and incentive consumers is key to leverage brand performance.

When building a briefing and the resulted marketing-plan, both brand and communication agency must analyse the consumer specificity for each market.

Having that in mind, the budget allocated to each phase is determined, in function of the needed push to help the customer going further on its journey while considering our brand.

At the same time, the different media options are matched with the budget and the steps, considering the Brand Equity (its image, awareness, loyalty and perceived quality). In this step, the Creative agency must join. These three parts must close together the strategy behind the campaign and its different stages, the creative material that needs to be developed, the correct target for each of the pieces (that can and must be different according to each message) and the timings of the process.

Only when acting together with this conceptualization in mind, the teams can build a powerful and effective Integrated Marketing Communication Plan.

6. Conceptual Framework

The main goal of this project is to fully diagnose the factors leading to a lack of performance of the female deodorant brand Narta. For that, we need to go some steps back in order to understand which factors can lead to this platooning performance. A note that even with this, Narta has a stable position in the market, so the offer and price seems to be adjusted (we will analyze this topic further). To complete our goal, we developed a conceptual framework with theoretical inputs and data analysis that, together, will help us to implement a new marketing-mix to the brand – **Figure 4**.

A hint arises from the IPSOS study about consumer called U&A (2015). Ranking total brand awareness in the female market, Narta ranks the 7th place even behind Sanex and Vasenol that have considerable less market share (less than half). Shocking, half of the sample does not associate Narta to the deodorants category – the only one where it is present.

This highlights two hypotheses that can arise together. One, Narta is not able to differentiate itself as a brand in its current marketing mix, assuming a parity or similarity proposition. This can be due to high isomorphic pressures but also from the misfit with the consumers' expectations. Second, knowing that Narta has a media investment consistent across years, a clear awareness problem is noticed that can be the reason for this lack of awareness from the consumer and no-association to the category and therefore the platooning situation. For that we must analyze the importance of the brand's integrated communication, evaluate if it is a source of a competitive advantage and if it fits the consumer journey, leading to purchase and consequently to market share.

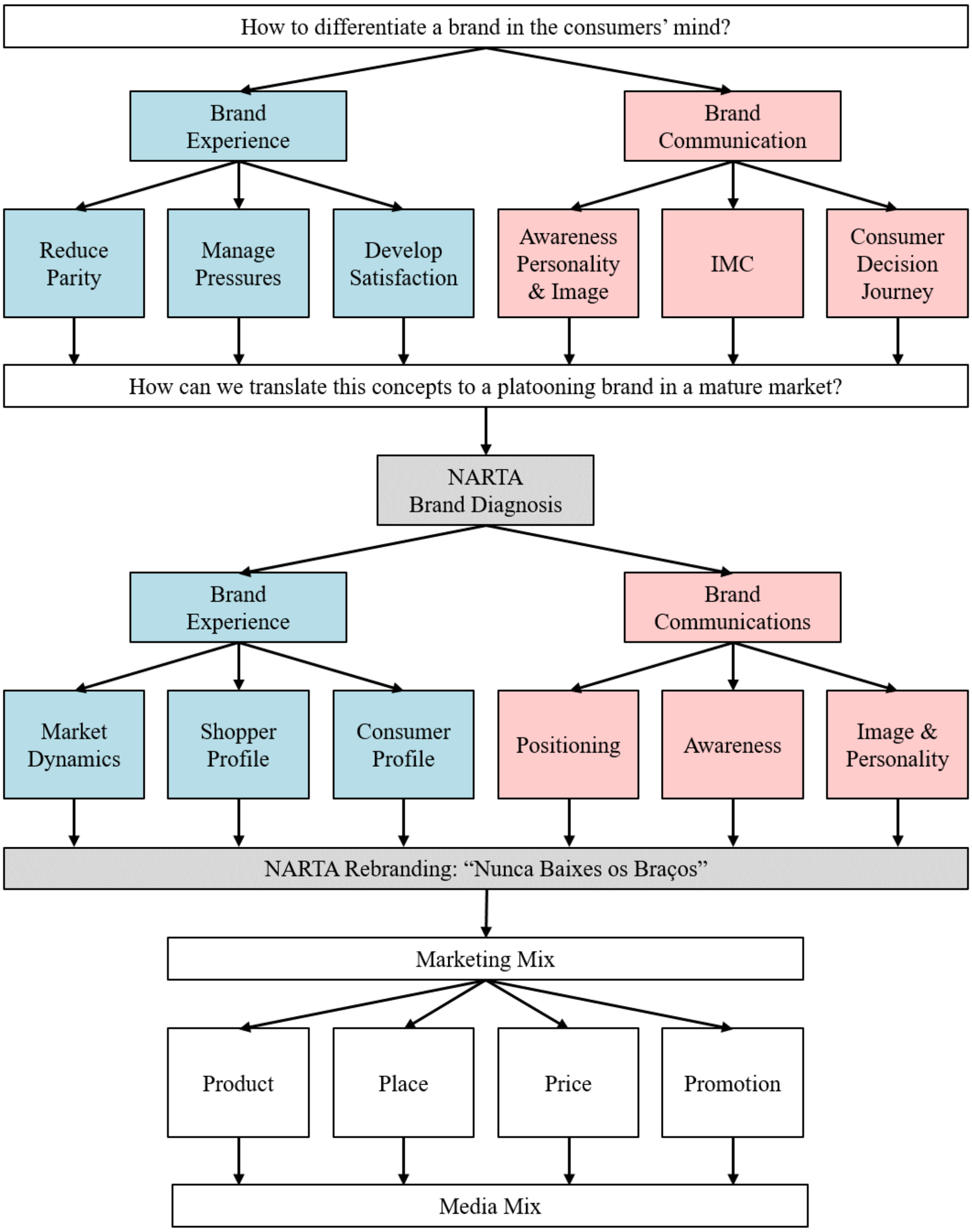
Hence, it is important to understand the role of brand experience and integrated marketing communication when diagnosing the Narta brand.

In a context of increasing emotional and experimental benefits opposed to functional ones (Zarantonello & Schmitt, 2010), brand experience is gaining more and more relevance in the competitive framework. Providing a unique brand experience to the consumers will help to achieve brand differentiation, reducing the parity and similarity effects that appear in many categories such as deodorants. With that, brand is able to effectively compete in the market and conquer its position (Kottman, 1997).

We need to understand the consumer path to purchase and access the current brand communication and its effects on the consumer. The success of the communication integration in the different stages, in the different media means is critical for the short-term sales' leverage but also to long-term brand construction (Osinga *et al.*, 2010).

After considering the evaluation of these two main constructs we will revisit Narta's Marketing Mix at the light of brand experience and IMC conclusions and focus a brief attention to the media mix in order to be able to express the changes in the Marketing-Mix.

Figure 4 – Conceptual Framework



7. Methodology

In my work as a Product Manager in L'Oréal, I have access to numerous sources of information that will help to conduct this investigation. Considering always the importance of the concepts explained before, we will match different sources of information in order to fully investigate the reasons behind the current performance of the brand.

To understand the mark dynamics from the category importance, to the key players competitive status in topics such as sales values and volume, distribution, promo pressure and split of formats we will use Nielsen data.

Nielsen is an independent company responsible for the market track in national Fast Moving Consumer Goods (FMCG) market delivering every four weeks a report with the same metrics to all the national players about their performance in the different segments and in the different markets.

In order to get a clear view about the shopper and its importance in the market and in the brands, we will access the **Kantar WorldPannel** reports. Kantar provides every three months data about the shopper performance per category indicating the penetration, the value and other important KPIs for the market, our brand and its competitors.

To fully reach every touch point of our framework other specific studies will be considered.

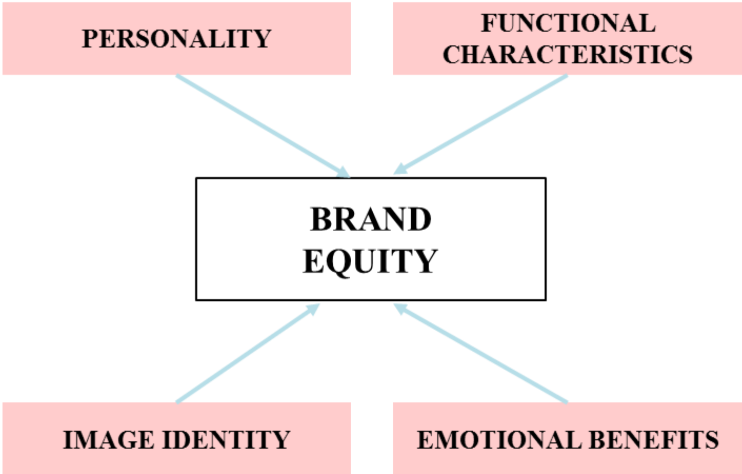
A qualitative study from **Amint** about Narta positioning will give us some hints about the consumers' view of the brand and its current perceived image among consumers. These studies were made using different focus groups:

(1) Qualitative Study of Garnier Narta perception (2012): 6 focus groups with women with an age gap of 20-45 years, B and C1 economical classes, responsible for the purchase/selection of their personal care brands, half are Narta users, half are not.

(2) Qualitative study – Positioning test for Narta (2013): 4 focus groups with women with an age gap of 20-45 years, B and C1 economical classes, responsible for the purchase/selection of their personal care brands, half are Narta users, half are not.

Evaluating the brand image is something that is currently done in L'Oréal by an independent agency called *IPSOS*. From them we have two important studies to be considered. One about the **Brand Equity Index** (BEI) that constructs the most important factors in each market and evaluates the brands in those factors. This is a global study with more than 600 women between 16 and 55 years old made in 2015. The aim of this study is to understand the hierarchy of the brand equity formation starting in awareness, then relevance, differentiation and emotional proximity, then value and last other relevant factors. IPSOS considers **Brand Equity** as "*the reflect of brand desirability, of consumer engagement toward the brand*". Knowing what drives brand equity, we are able to know what will drive success in the market with a strong brand desire in a 4 constructs framework (see **Figure 5**): personality, functional characteristics, image identity and emotional benefits.

Figure 5 - Brand Equity dimensions.



Also from **IPSOS**, a study called U&A – a 360-degree study about the deodorants category, examining the consumer, their habits, the brands and the differentiation factors that are gaining expression in the market. This is an ad-hoc qualitative research made in 2015 with 12 main sections: perspiration – expressions and concerns, attitudes towards perspiration, perspiration and hygiene, overall attitudes regarding deodorants, ingredients, habits of product usage, epilation, spots and traces, scented and non-scented deodorants, purchase criteria, satisfaction and drivers, and, perceptions about the brands. It considers both male and female consumers between 16 to 65 years old.

At last, some media inputs will arise from OMD (media agency) and will be at that time explained in the paper.

The synchronization of this different studies and inputs will provide a complete analysis of the Narta brand and the touch-points that, in the light of Brand Experience and Brand Communication frameworks, must be reworked.

8. Report & Data Analysis

8.1 Hygiene Market Outlook – brief history

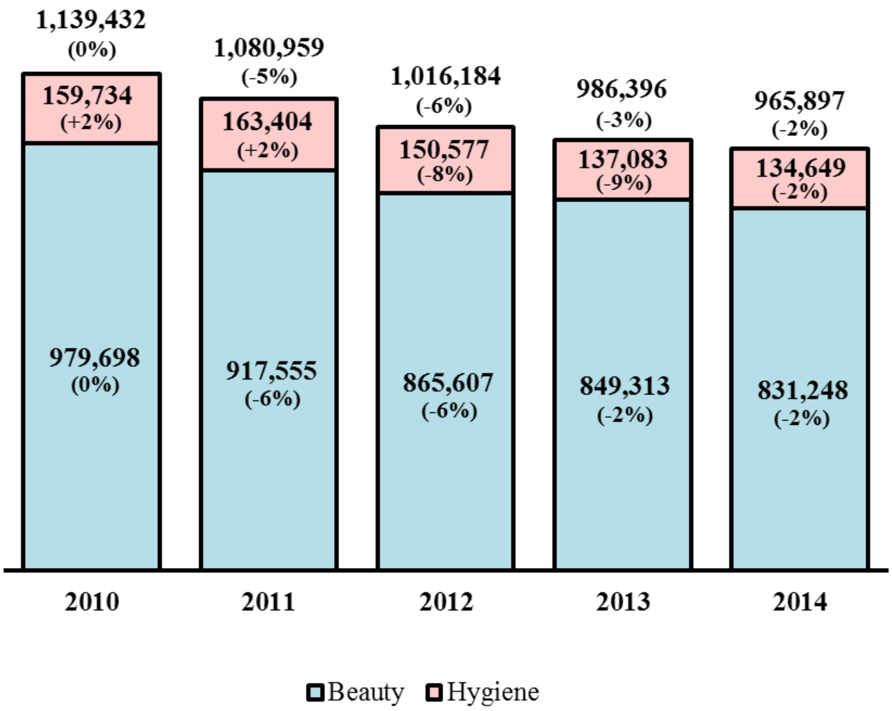
The H&B market are the target markets of L'Oréal and its four different division. As a total it is a market that worth's around 1,000M€, divided in **Beauty categories** (hair care, styling, coloration, face care, body care, sun care, make up and perfumes) and **Hygiene categories** (deodorants, shaving, after-shave, hand cleansing and shower gel).

In 2014, a global diagnose of the market was made matching the CPD market share in both segments and the correct strategy to tackle which of them (**Figure 6**).

Hence, in the **Beauty market**, with a total value of 831,248€, where CPD had 28% of share, the clear strategy was to protect our market share while increasing penetration.

In contrast, in the **Hygiene categories**, having 134,649€, with a low representation of CPD (only 5% of market share) the clear strategy was to expand the business in order to gain a relevant presence in this slice of the market.

Figure 6 - Beauty and Hygiene Sales value

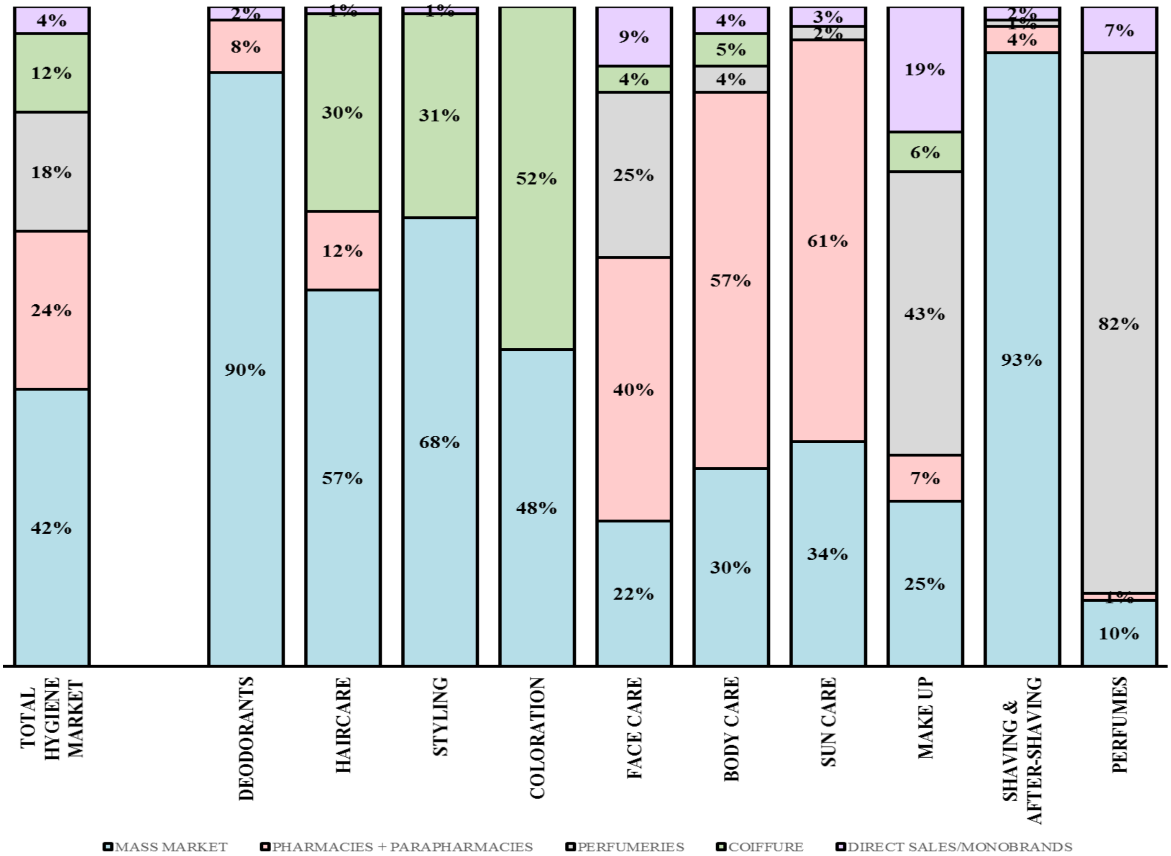


Source: Nielsen (Net values) considering mass market, pharma and parapharmacies, perfumeries, hairdressers and direct sales/monobrands.

Even with a decreasing performance of the hygiene value, something was clear. Hygiene value is over performing the beauty categories. Have in mind also that the beauty categories have an average price considerably higher than the hygiene ones.

If we split the categories by its presence across the different markets, deodorants arise as an even bigger opportunity to CPD. As present in the **Figure 7**, we conclude that 90% of the deodorant business is made in Mass-Market.

Figure 7 - Split of Categories per Distribution Channel.

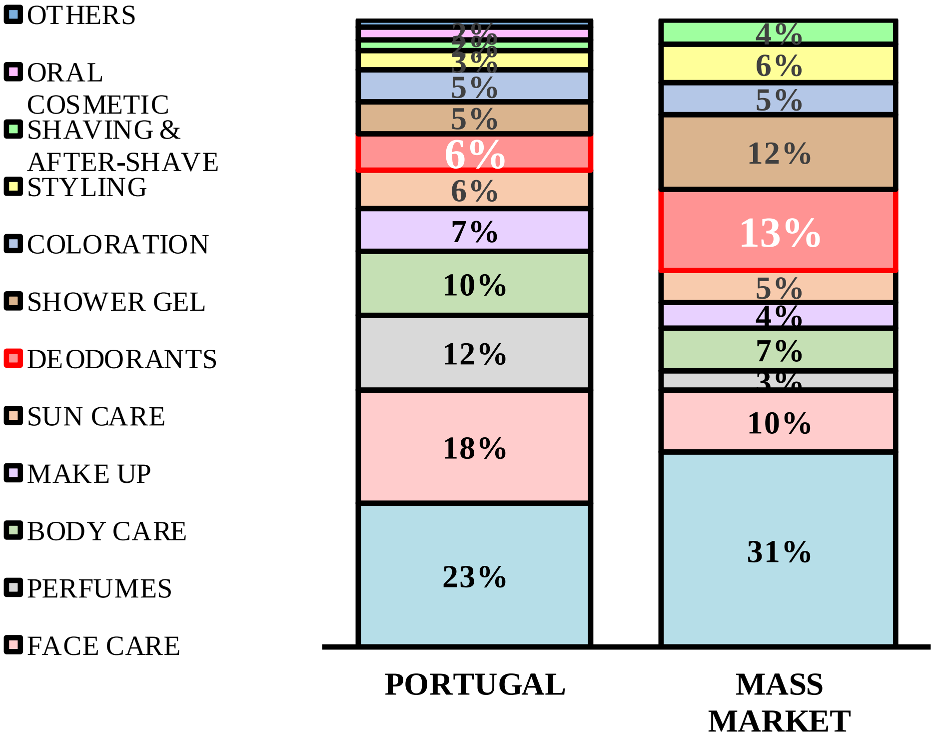


Source: Nielsen (Net values) considering mass market, pharma and parapharmacies, perfumeries, hairdressers and direct sales/monobrands

Putting this data in a ranking perspective in **Figure 8**, deodorant category is only the number seven in total H&B market representing 6% of the total value of the market.

However, looking only to the mass-market segmentation per categories, deodorants are the second biggest category, just after haircare, representing 13% of total value of the mass-market business in H&B.

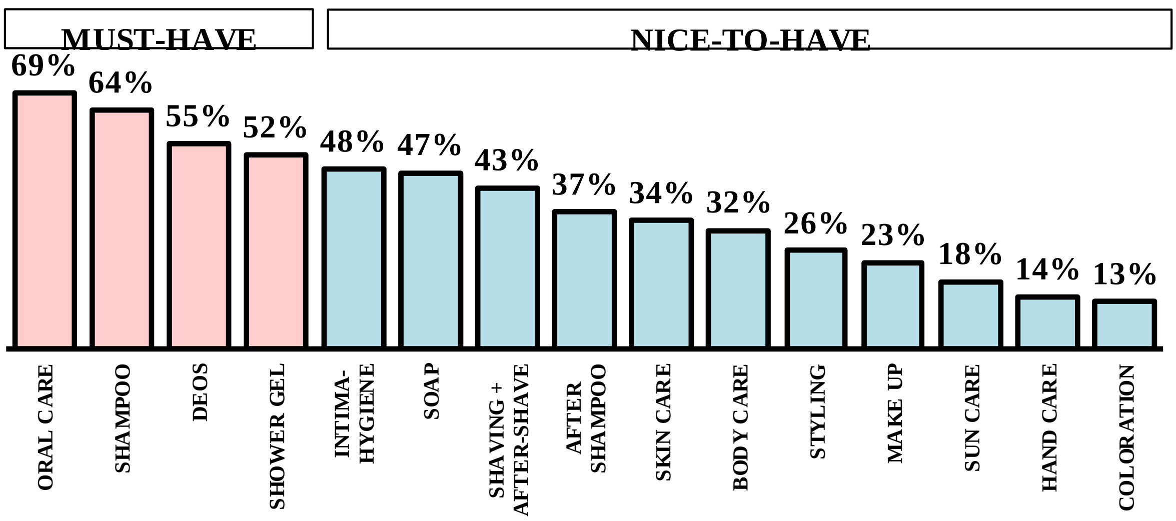
Figure 8 - Total H&B Market Split *versus* Mass Market Split per Categories.



Source: Nielsen (Net values) considering mass market, pharma and parapharmacies, perfumeries, hairdressers and direct sales/monobrands

Why then betting on a small slice of the total market? Not only because it is the second biggest segment in the market in value but also due to the Portuguese shopper characteristics. Portugal, in terms of shopper, is a hygiene country since three of the four “must have” categories in term of penetration are hygiene ones (please consider **Figure 9**).

Figure 9 – Categories’ Penetration (2014) in total universe.



SOURCE: Kantar WorldPannel, 7000 individuals, shopper panel.

Beyond the great shopper penetration in deodorants, the usage (in terms of consumers) follows the same trend – see **Table 5** – where Portugal ranks the highest in terms of Deodorants' Penetration.

Table 5 - Comparative of Penetration of H&B Categories in Europe.

	PORTUGAL	EUROPE TOP 5	FRANCE	GERMANY	UNITED KINGDOM	ITALY	SPAIN
DEODORANTS	**91%**	88%	85%	86%	93%	84%	91%
SHAMPOO	96%	91%	94%	93%	93%	86%	88%
COLORATION	54%	61%	54%	65%	63%	62%	63%
STYLING	31%	56%	43%	65%	61%	56%	56%
SKIN CARE	75%	82%	80%	85%	85%	80%	82%
BODY CARE	70%	79%	73%	80%	84%	74%	85%
SUN CARE	74%	72%	67%	66%	73%	74%	80%
MAKE UP	71%	84%	83%	77%	88%	87%	87%

Source: IPSOS Beauty Track 2012

The main highlight is that the **second biggest category** in terms of consumer penetration is deodorants with 91%, above the average of the top five biggest countries in Europe.

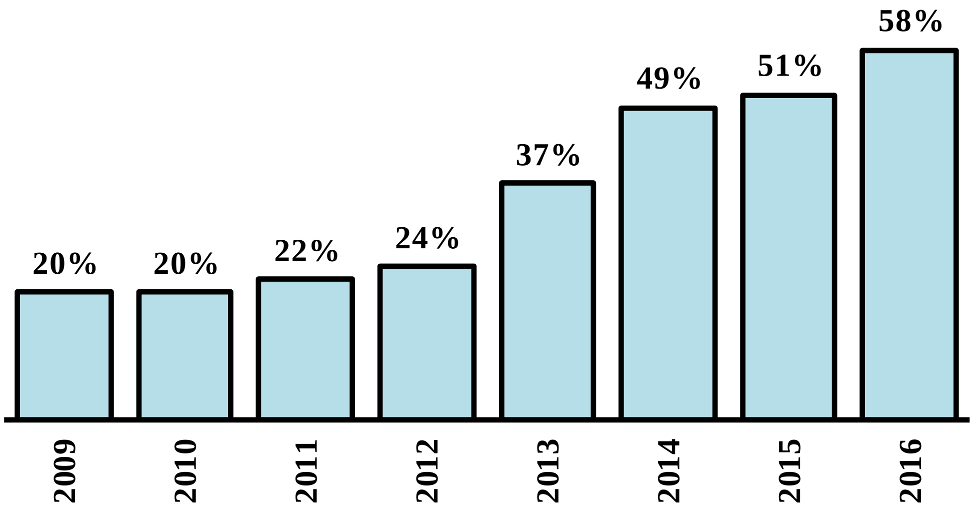
A brief note about what means to be a **shopper** and a **consumer**. In these studies a **shopper** is someone that bought at least one time the category/product/brand in the last 12 months. On the other hand, a **consumer** is someone that has used at least one time in the last 12 months the category/product/brand (it does not need to have bought it in order to use it).

Therefore betting on deodorants present a huge opportunity to recruit shoppers to the CPD and to have a Trojan horse to penetrate a new high volume market, increasing our competitiveness in the global H&B market. At the same time is a weapon to weaken our main competitor's business construction.

Deodorants represent 23% of Beiersdorf presence with the Nivea brand and 36% of Univeler's business with Dove, Rexona, Axe and Vasenol (Nielsen net prices, Mass Market, 2014).

However, this very dynamic and important category has a deep and unique characteristic. It is a promo driven one. In the table XX, regarding the **Promotional Pressure**, we can state that in five years the promo pressure increased to almost 50% of the sold units in this market. In 2016, the deodorant's market had a 58% of promotional pressure versus 52% of the average promotional level in H&B categories.

Figure 10 – Deodorants' Market Promo Evolution.



Source: Nielsen, Promo Volume, 2016

The immediate consequence is a decrease of the loyalty.

Only 34.6% of the value spent per year and per shopper in this category is in the same brand (for instance in Coloration is 49.7% and in body care is 40%). (Source: Kantar WorldPannel, 2014).

Regarding **Media Investment**, according to the Media Agency OMD (Media total investment report, 2014), the deodorant market is the 3rd in terms of absolute media investment in total beauty, following Haircare as #1 (39% of share of spending), Skincare as #2 (34% of share of spending), with a total share of spending of 12% and growing at a rate of +43%.

In summary, deodorant market is the second biggest market in mass and also a huge opportunity for CPD in the 2014 scenario where low penetration a low market share where the status. In addition, in terms of **shopper penetration** is the third category and regarding consumer penetration the second.

This determines a **huge opportunity** to be explored by CPD but also some difficulties: it is one of the highest promo markets inside the H&B market and has low loyalty from its shoppers. In order to understand a bit more about the consumer and shopper, we will briefly address each of them, characterizing them and highlighting the main touch-points for future approaches.

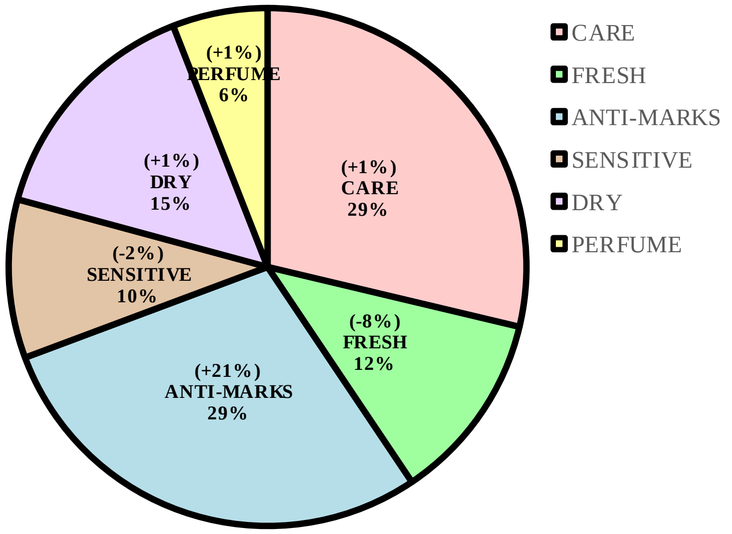
8.2. The Deodorant Market

As stated, the **deodorant category** has great importance in the mass market, being the second biggest category, weighting 13% of the whole value of the H&B categories in this market. The women segment is bigger than the male one, worthing 25.7M€ (Nielsen, Hipers+Supers, sales value, 2015), equivalent to 53% of the whole deodorant value and growing at a rate of +0.8%. Also, this is a market that presents some seasonality, increasing its value in the summer months.

In terms of **formats**, Roll on is the main format in the female market (59.9% but with a flat evolution), then Sprays representing 31.2% but growing at +12.6%, Creams with 5.6% of the market and decreasing at a rate of -10.5% and, finally, Sticks at +2.7% but only representing 3.2% of the market.

Regarding the **Split of The Market** considering the benefits – please see **Figure 11** – Market *Camberbets* (expression used when analysing the split of the market in terms of its formats or benefits), the biggest segments are Care and Anti-marks representing which 29% of the total female market. The biggest growing segment is anti-marks (+21%), which is corroborated with the qualitative insights about the importance of avoiding stains in the clothes.

Figure 11 - Market *Camberbets*.



Source: Nielsen, Hipers+Supers, sales value, 2015

In **Table 6**, we can find the market's top 10 products in value, where Narta is present with the number one and number three most sold products in this market.

Table 6 - Market Ranking.

Rank	Brand	Product	Format	Segment
1	**NARTA**	BIO-EFICÁCIA	ROLL-ON	CARE
2	**DOVE**	INVISIBLE	ROLL-ON	ANTI-MARKS
3	**NARTA**	INVISÍVEL	ROLL-ON	ANTI-MARKS
4	**NIVEA**	INVISIBLE BLACK & WHITE	ROLL-ON	ANTI-MARKS
5	**DOVE**	TALC SOFT	ROLL-ON	CARE
6	**REXONA**	TROPICAL	ROLL-ON	PERFUME
7	**DOVE**	INVISIBLE	SPRAY	ANTI-MARKS
8	**REXONA**	INVISIBLE BLACK + WHITE	SPRAY	ANTI-MARKS
9	**REXONA**	TROPICAL	SPRAY	PERFUME
10	**DOVE**	TALC SOFT	SPRAY	CARE

Source: Nielsen, Hipers+Supers, sales value, 2015

Considering the brands' weight in the market, please attend on the **Table 7** – Main brands market KPIs.

Table 7 - Main brands market KPIs.

	MARKET SHARE			% SOV (GRPsEQ)			% PROMO VOLUME		AVERAGE PRICE	
	2015	2016	Evol.	2015	2016	Evol	2015	2016	2015	2016
DEOS FEMME (000 €)	25,688	26,438	+2.9%	36,142	29,042	-20%	55.4	58.6	2.21	2.17
Roll On	61.7	59.9	-0.1%				57.8	60.1	2.03	2.02
Spray	28.6	31.2	+12.6%				53.9	60.3	2.30	2.21
Creme	6.5	5.6	-10.5%				34.8	22.7	3.93	4.20
Stick	3.2	3.2	+2.7%				32.3	34.7	4.17	3.96
NARTA	**13.8**	**13.7**	**+2.1%**	**11.2**	**21.7**	**+55%**	**62.1**	**67.8**	**2.32**	**2.21**
NIVEA	**23.1**	**23.4**	**+4.2%**	**41.8**	**48.6**	**-6%**	**57.0**	**63.1**	**2.42**	**2.29**
UNILEVER	**40.6**	**41.5**	**+5.2%**	**45.5**	**29.7**	**-48%**	**60.7**	**64.6**	**2.45**	**2.40**
DOVE	18.1	18.7	+6.3%	13.3	17.5	+6%	63.8	65.0	2.41	2.44
REXONA	14.1	14.9	+8.7%	32.2	12.2	-70%	56.0	66.7	2.52	2.37
VASENOL	8.3	7.9	-3.0%				61.3	60.0	2.41	2.38
SANEX	**7.4**	**7.5**	**+4.3%**				**71.1**	**70.7**	**2.04**	**2.03**
MDD	**6.9**	**6.2**	**-7.6%**				**31.4**	**24.7**	**1.02**	**1.03**

Source: Nielsen, Hipers+Supers, 2016

We can see that 71% of the market value is concentrated in four main brands – Nivea, Dove, Rexona and Narta. Among this four, Narta is the one with the highest promotional volume but it is not the growing faster.

The main brand is **Nivea** with 23.4% of market share growing at +4.2%, followed by **Dove** with 18.7% of Market Share (+6.3%) and **Rexona** (14.9% of Market Share at +8.7%).

Narta ends the year with 13.7% of Market Share but growing slower than the market at 2.1%, losing share when comparing with 2015. Even increasing in five points its promo pressure, Narta is not able to reach a positive performance in 2016.

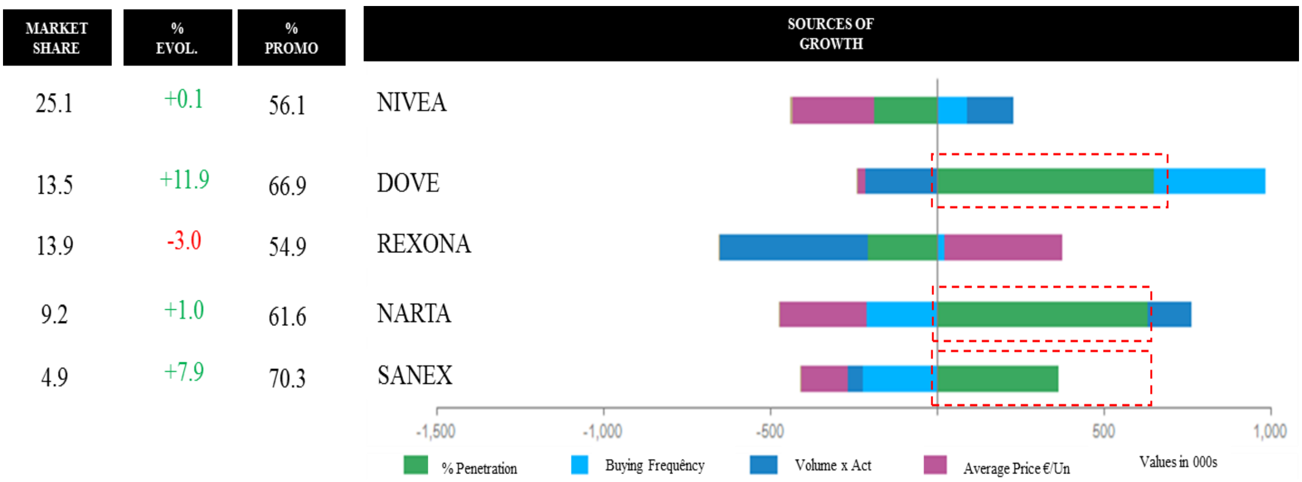
Vasenol is the fifth brand in the market with 7.9% of Market Share followed by **Sanex** with 7.5% of Market Share (both with almost half of Market share of Narta).

Private Label Brands do not have a particular significance in this market since they only represent 6.2% of market's value.

Regarding the **Share-of-Voice (SOV)**, Nivea holds almost 50% of the categories' TV investment, followed by Narta with 21.7% and then Dove (17.5%) and Rexona (12.2%). This increase in Narta's media investment (+55%) had not the expected leverage in terms of MS.

By cross-analyses of Nielsen and Kantar's data, we therefore conclude that penetration it is the main source of growth in the market – **Figure 12** – Sources of Growth.

Figure 12 - Sources of Growth.



SOURCE: Kantar WorldPannel KPIs for growth and Nielsen Total Deos Market value, 2015

We can conclude with this information that the main source of growth is an increase on the shopper penetration. The main growing brands have in this KPI the greatest positive gap when compared with the last year.

For a complete understating about the market dynamic, we will look inside the main brands and highlight their main performance drivers.

First, a brief look to the market's offer in terms of benefits in the **Table 8** – Brands' main ranges.

Table 8 - Brand's main ranges.

SEGMENT (VAL.)	FRESH 12%	DRY 14%	ANTI-MARKS 28%	CARE+SENSITIVE 40%	PERFUME 7%
NARTA 13.93%	BACTI-PURO, FRESQUISSIMO 0 MS	DRY SENSATION 0.31 MS	INVISÍVEL, PROTECTIONS, IMPECÁVEL 0 MS	BIO EFICÁCIA, TOQUE DE NÁCAR, TOQUE SEDA, PELE PERFEITA, PEDRA ALUME 0 MS	0 MS
NIVEA 23.59%	FRESH NATURALS 0 MS	DRY CONFORT, STRESS PROTECT 4.56 MS	INVISIBLE B&W (FRESH), PURE INVISIBLE 0 MS	DOUBLE EFFECT, PEARL, PROTECT CARE, PURE NATURAL, TALC SENSATION, SENSITIVE & PURE 0 MS	0 MS
REXONA 14.93%	SHOWER FRESH, NATURAL MINERAL (PURE/FRESH), ACTIVE SHIELD, SHOWER FRESH 0 MS	LINEN, DRY, BIORYTHIM, COTTON, STRESS CONTROL, MAX PROTECTION 4.46 MS	INVISIBLE B&W, CRYSTAL (AQUA, PURE) 0 MS	0 MS	TROPICAL 4.25 MS
DOVE 18.77%	GO FRESH (TOUCH ENERGIZANTE) 0 MS	SILK DRY 0.88 MS	INVISIBLE 0 MS	ORIGINAL, TALC SOFT, MAX PROT, COTTON SOFT, NATURAL TOUCH, PURE 0 MS	0 MS

Source: Nielsen, Hipers+Supers, 2016

The offer is consistent and cross-benefits from all the brands. Of course, each of them has their focus: Narta, Nivea and Dove focus on anti-marks and Care and Rexona on anti-marks and dry segment.

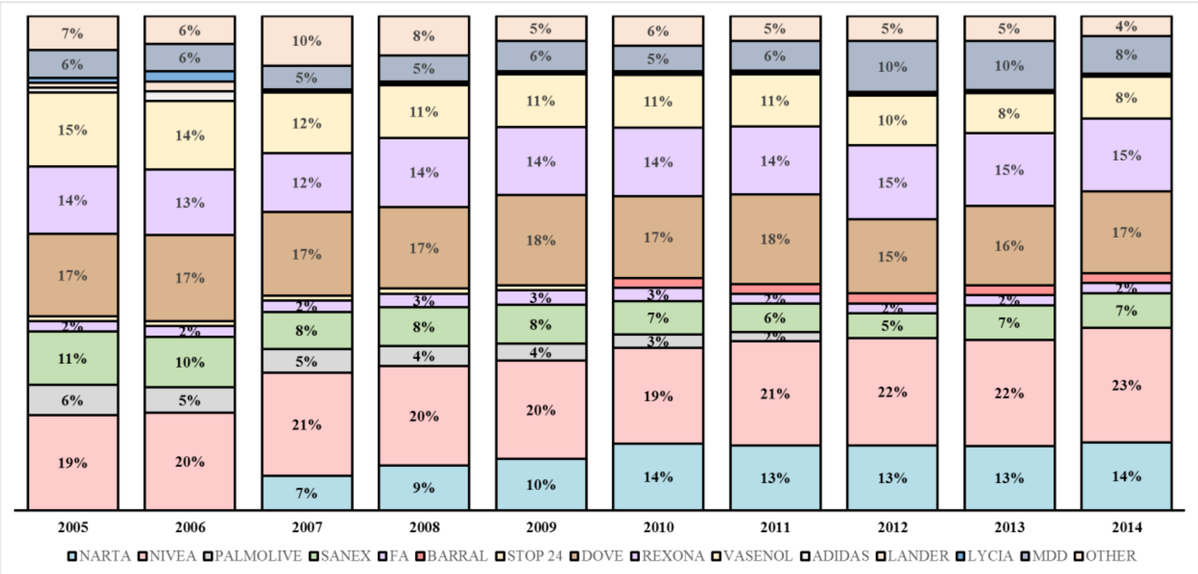
This leads to a **lack of product functionality differentiation** since, in every brand; you can find a complete offer for the benefit the consumer wants.

Second, a note also for the **price cascading**: the shelf price is usually aligned, 3.39€ for Roll On and 3.59€ for Sprays (this analysis was made considering the available ranges in the Continente Online website in October, 2017. (The price is set by retailers).

8.2.1. Brand Performance - Narta

Narta was launched in 2007 reaching a 6.9% of MS in its first year – **Figure 13**.

Figure 13 - Narta's Market Share Evolution.

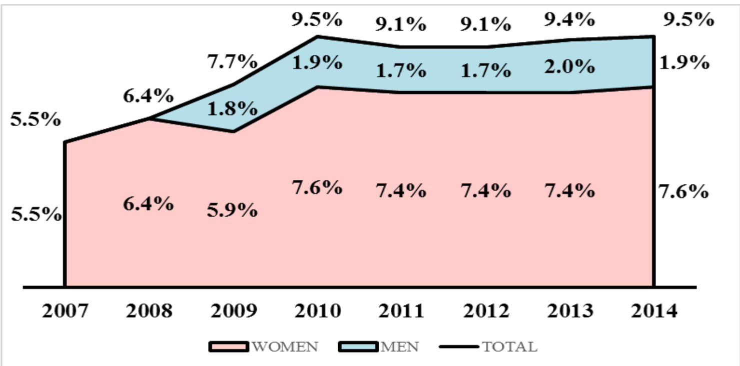


Source: Nielsen, Hipers+Supers, Value

After the strong first four years, the brand stagnated in the 13% of market share and, besides having small variations; it was not able to gain its competitive and relevant position in the female deodorants market.

A brief note about the male market. Narta launched its masculine range one year later, in 2008, helping to leverage a bit the relevance in the total deodorants market. However, the male segment was never a priority for the development of Narta and that is the reason why we are not focusing that segment in our analysis – **Figure 14** – Narta's Segment construction.

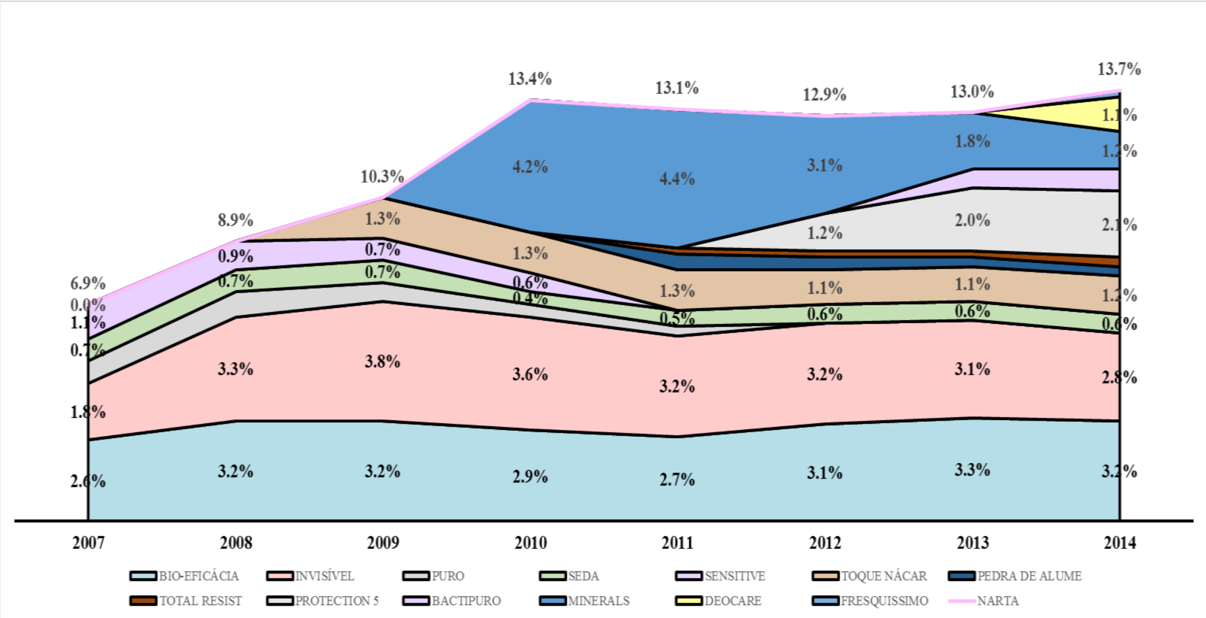
Figure 14 - Narta's segment construction.



Source: Nielsen, Hipers+Supers, Value, Total Deodorant Market, 2014

Even though it has had a few launches across the years, Narta is clearly a brand made of pillars – see **Figure 15**. Bio-eficácia and Invisível ranges, the first ones launched, are kept as main priorities across the years and Bio-eficácia Roll On is even the number one product of the female market in terms of sales value and Invisível third. In 2011, Protection 5 is launched and from that moment on became a priority for the brand and it is currently the number 3 franchise.

Figure 15 - Narta's brand construction.



Source: Nielsen, Hipers+Supers, value

In store, the low visibility and absence of differentiation of Narta is evident – **Figure 16**.

Figure 16 - Narta Point-of-Sale (POS) Expression.

8.2.2. Brand Performance – Main Competitors

First, the main player – **Nivea** that represents 23.4% of the female deodorant market. Nivea has 11 different ranges. Invisible Black and White it is the main range (considering the variations of Original, Fresh and, the 2017 launch, Active) with 7% of Market Share. Dry comfort and Pure & Natural are the following ranges with 2.7% of Market share each. In 2016, Nivea launched very successfully Protect & Care with the exact colour code of the blue box and a communication strategy about its heritage and it was able to conquer 2,7% of Market share in the first year. Other ranges: stress protect, talc sensation, sensitive & pure. Fresh & natural, pure invisible and pure & natural. Nivea has a very strong communication in-store, maximizing their blue signature – see **Figure 17**.

Figure 17 - Nivea's POS Expression.

The second market player **Dove** has reached 18.7% of Market Share in 2016, winning +0.6pp of Market Share. The three main ranges are Original with 5.1% of Market Share, followed by Invisible with 4.7% and Talco Soft with 4.2%. Dove strategy is all about maximizing pillars, with a shorter portfolio of 8 ranges (4 of them launched in 2017 – the Go-Fresh ranges), it has helped the brand to focus on the maximization of their main priorities. The Original range is deeply connected with their skin care and shower gel's equity and keeps the promise of having ¼ of hydrating cream. Dove plays a white spot in the POS transmitting purity and care, well connected with their hydration heritage – see **Figure 18**.

Figure 18 - Dove's POS Expression.

At last, **Rexona** is the third market player with 14.9% of Market Share. Has 9 ranges: cotton dry, biorhythm, stress control invisible aqua (2017 launch), invisible black + white, active shield, shower fresh, tropical and maximum protection. With a more fragmented outlook, Invisible it is the main range with 1.7% of Market share followed by Biorhythm with 1.4% Market share. In the POS, Rexona has a more discreet presence than the two main players, also using white as their preferred colour – see **Figure 19**.

Figure 19 - Rexona's POS Expression.

8.3. The deodorant shopper – a brief outlook

Comparing the main segments in the beauty market, we can rank them in terms of number of shoppers as in the **Table 9** – Main Categories' Shopper Key Performance Indicators (KPIs).

Table 9 - Main Categories' Shopper KPIs.

2016	TT BEAUTY	HAIRCARE	DEODORANTS	SKINCARE	STYLING	SUNCARE
% Penetration	83.2	66.0	56.1	51.6	23.9	19.0
Shoppers 000s	7,211	5,724	4,861	2,399	2,074	1,650
Buying Frequency	8.6	3.6	2.8	4.1	2.4	1.2
Average Spent in €	66.34	22.82	10.18	44.79	9.66	16.03
Average Purchase unis	12.7	5.4	3.9	3.6	2.7	1.5
Spent X Act €	7.75	6.38	3.62	10.98	4.09	13.47
Volume x Act unis	1.5	1.5	1.4	0.9	1.2	1.3
Average Price €/Unis	5.21	4.26	2.60	12.32	3.55	10.59

Source: Kantar WorldPannel, 2016

Deodorants in 2016 is the second in terms of absolute shoppers (not considering shower gel or oral care in our analysis for lack of data), following haircare in this metric. That means that per year there are 3,792,000 shoppers buying at least once a deodorant in the mass market, representing 56.1% of total mass-market shoppers.

Per year they buy in average 2.8 times a deodorant, spending 10.18€ for 3.9 units. As a consequence deodorants is a de-valorized category when comparing with our panel with an average price per unit of 2.60€, well below the market average of 5.21€.

As our focus with the analysis regards the female universe, our following analysis will focus only on the women segment. In the **Table 10** – Feminine Deodorant Shopper Profile we can verify the main Key Performance Indicators of this segment and the women shoppers.

Table 10 - Feminine Deodorant Shopper Profile.

		2015	2016
DEODORANTS	% Penetration	61.3	62.5
	Shoppers 000s	2,842	2,908
	Buying Frequency	3.0	2.9
	Average Spent in €	10.81	10.48
	Average Purchase unis	4.1	4.0
	Spent X Act €	3.62	3.62
	Volume x Act unis	1.4	1.4
	Average Price €/Unis	2.67	2.61
	% Loyalty Value	100.0	100.0

Source: Kantar WorldPannel, 2016

We can verify a **positive outlook** for the female market in penetration (it increased to 62.5% of the female shopper population), with more than 2.9 Million shoppers in beauty. However the increasing promo pressure also has a negative impact on the shopper KPIs – the average spent drops more than 30 cents and the average price drops to 2.61€ per unit.

The main brands are also following this trend as verified in the **Table 11.**

Table 11 - Main Female deodorant brands' KPIs.

2016	NIVEA	DOVE	REXONA	NARTA	VASENOL	SANEX
% Penetration	24.7	17.8	16.3	10.9	7.3	7.2
Shoppers 000s	1,149	829	758	507	341	336
Buying Frequency	1.8	1.4	1.5	1.4	1.3	1.4
Average Spent in €	6.09	4.91	5.34	4.39	4.16	4.52
Average Purchase unis	2.3	1.8	1.9	1.7	1.6	1.9
Spent X Act €	3.34	3.43	3.53	3.23	3.25	3.24
Volume x Act unis	1.2	1.3	1.3	1.2	1.3	1.4
Average Price €/Unis	2.68	2.68	2.76	2.60	2.59	2.38
% Value Loyalty	44.0	32.8	37.0	34.0	31.7	34.1

Source: Kantar WorldPannel, 2016

The biggest player is **Nivea** due to higher penetration rate and also the highest value loyalty, which means that their shoppers are the most loyal ones, having 44% of its annual spent exclusively to Nivea.

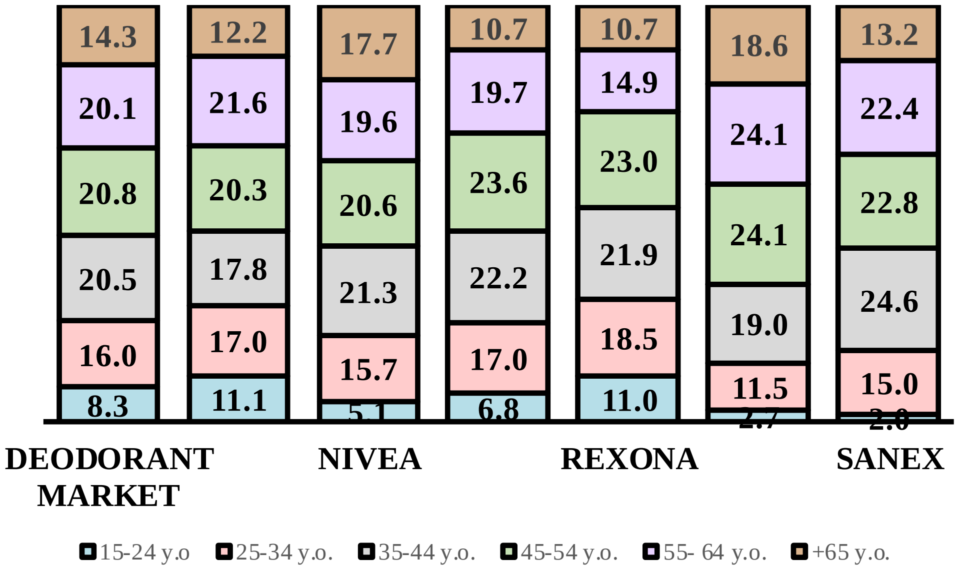
A note, **Dove**, as the second player, as an important role on the market valorization since it's spent per act is clearly above the market average and its main competitors.

Rexona appears as the third player with 16.3% of penetration in the feminine market and even a higher average spent than Dove.

In the 4th place, **Narta** presents a considerable gap in terms of shoppers to the next player (Rexona) and a lower loyalty rate. However, Narta's shoppers are more loyal than Dove's but that is not sufficient for the brand to increase its market penetration and gain a better competitive outlook.

In terms of age profile there are also some gaps that we should highlight for future marketing-mix considerations present in the **Figure 20** – Age Shopper Profiling.

Figure 20 - Age Shopper Profiling.



Source: Kantar WorldPannel, 2016

With the analysis of the **Figure 20**, we conclude that there are significant gaps when we age profile the brands. **Narta** appears as a younger brand with one third of its shoppers below 34 years old while Nivea only has 20%. Also, when comparing to **Rexona**, the target brand to surpass, Narta needs to recruit manly in the 35-44 years old shoppers, with the goal of having the fair share of the deodorant market. Finally, the players that have a lower relevance but are growing towards Narta position, Vasenol and Sanex, are clearly older shopper brands due to its presence in skin care and body care markets with a label of caring brands.

The **shopper profile** is a tool of extreme importance for a brand manager since it allows to understand the concrete effects of the marketing-mix that is being implemented in the market. It also helps to determine the correct target for brand communications' according to the main goal of that media mix. If the goal is to recruit, the brand must target a less-developed slice of its shoppers. If the goal is to leverage its performance, it might be better to target its biggest slice since are the ones that already buy the brand and are more likely to repurchase inducing higher media elasticities.

However is never easy to define a concrete positioning of the brand just looking to its shopper profile. Some **key elements** of this brands, namely in deodorants where 91% of the Portuguese population are users, can only be discovered with a consumer analysis. For that we will now enter into our consumers' mind and try to find if some relevant aspect arises from them.

8.4. The deodorant consumer - profiling

The following analysis is based on the data from the IPSOS U&A study that focus on deodorants consumers and their relationship with the category and the brands.

When **talking about sweat** 84% state that perspiration is healthy and is also a consequence of strong emotions and stress. However it is something that induces some discomfort (89% assume that feel uncomfortable when sweating).

The **main occasion for high perspiration** is when is hot (88%) and then during exercise (81%) but both with low levels of inconvenience 26% and 9% respectively). However, the highest level of inconvenience (72%) is related with stress perspiration that occurs in particular moments of life such as job interviews, romantic dates, during the job and so on. This highlights the need of feeling secure and clean especially in important daily situations.

The **main unpleasant consequences** of perspiration for women are bad odor and the stains that are left in the clothes (both with 74%) indicating that the visibility of the sweat is the main cause of discomfort with this natural body process.

The **consequences** have three main areas of negative impact: physical discomfort, dirtiness feeling but also a social discomfort. Female evidence even higher influence the consequences of this stress and are more affected by stress moments.

Deodorants are part of people daily life, quoting *"I can't see myself leaving home without putting a deodorant"*, referred by 75% of the respondents, highlighting the importance of the product in the daily routine of the women.

Therefore, **the consumers expect** effectiveness of the product (83%) but also care of the skin (85%). Regarding information about this category, digital media (60%) and television (56%) are the most referred for recalling of communication about deodorants. Also highlighted for 33% the need for brands to improve their website's in order to provide more information.

The factors about the entry to the category are also relevant: The average age for start to use deodorants is 17 years old but 16 on women.

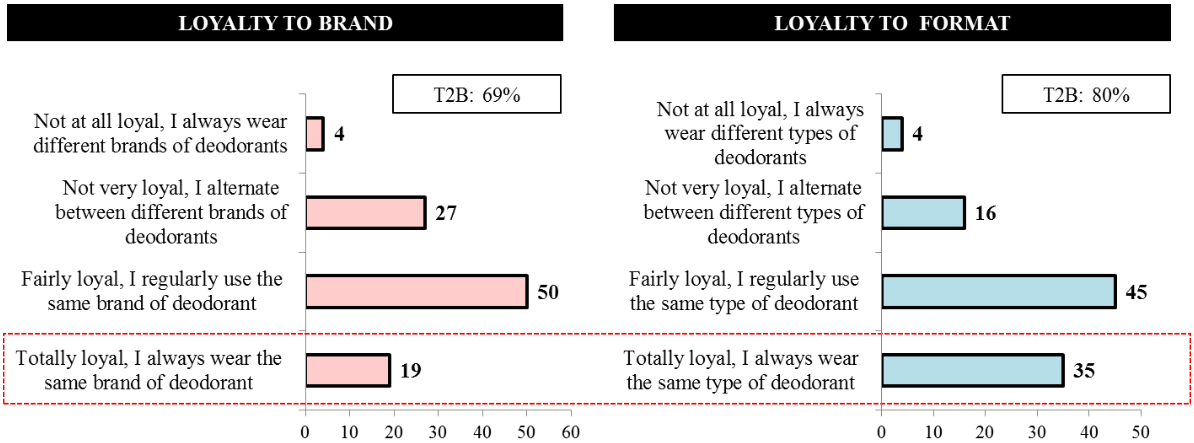
The **first deodorant used** is usually from a friend's/relative's (42%) which highlights the importance of the entry in the category. If the first used is from our brand the probability of gaining a consumer is higher even when not shopping.

One issue arises when considering the **current satisfaction** with the current deodorant. 94% of women are satisfied or very satisfied with their current deodorant, which makes it harder and costly to recruit. The main drivers are the light texture and all day efficacy. Product innovation appears as one of the weakest factors (49%).

When purchasing, women are more involved than men are since 95% choses and buys their deodorant versus 87% in men. The strongest factors when choosing a deodorant are: effectiveness (92%), price (86%) and the type of product (84%). The brand occupies a relatively low position of only 60% bring the factor number 13. Promotions are a big driver and usually induce the purchase of more units (64%).

Having in mind the **price** importance, we should question the loyalty of the consumers. In the **Figure 21** – Loyalty towards brand and towards format, we can state that the loyalty to the type of deodorant (spray or roll on) is quite higher than to brand, in line with the purchase criteria where type scored 84% and brand only 60%. The Top-to-Bottom (T2B) in brand loyalty is considerably lower than in the loyalty to format, strengthening our argument.

Figure 21 - Loyalty towards brand and towards format.



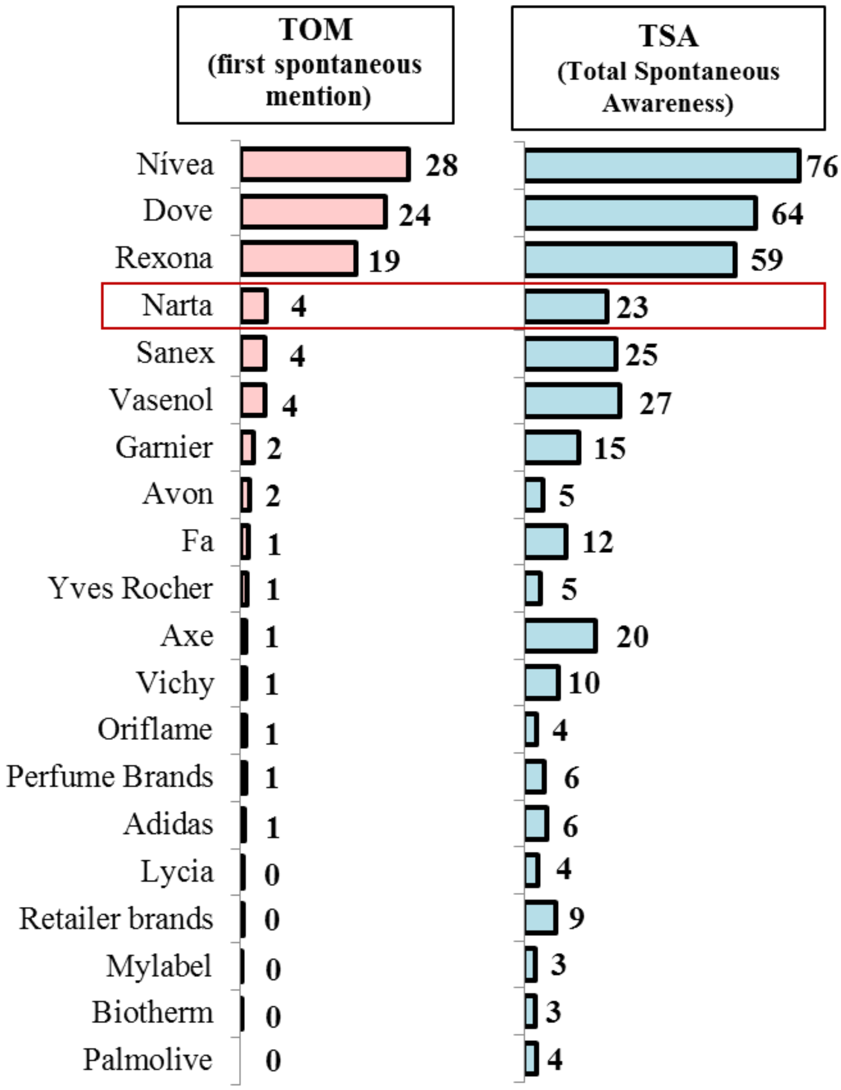
SOURCE: IPSOS U&A Deos, 2015.

Also, in the absence of the current product, 62% decides to buy the same type but from a different brand, enhancing the low brand loyalty in this market (versus 36% as a benchmark from the haircare market).

8.4.1. Brand Awareness analysis

Entering the brand analysis, significant outlooks can be taken in order to conceptualize our diagnosis. First, the evaluation of brand's awareness by two distinct metrics. **Top-of-Mind (TOM)** brands that consist in the very first brand that a consumer points as associated to the category. Second, **Total Spontaneous Awareness (TSA)** that arises from the brands that the consumer spontaneously refers as associated to the category. In the **Figure 22** - Deodorant Brand's TOM and Spontaneous Awareness we can verify the results of this test.

Figure 22 - Deodorant Brand's TOM and Spontaneous Awareness.

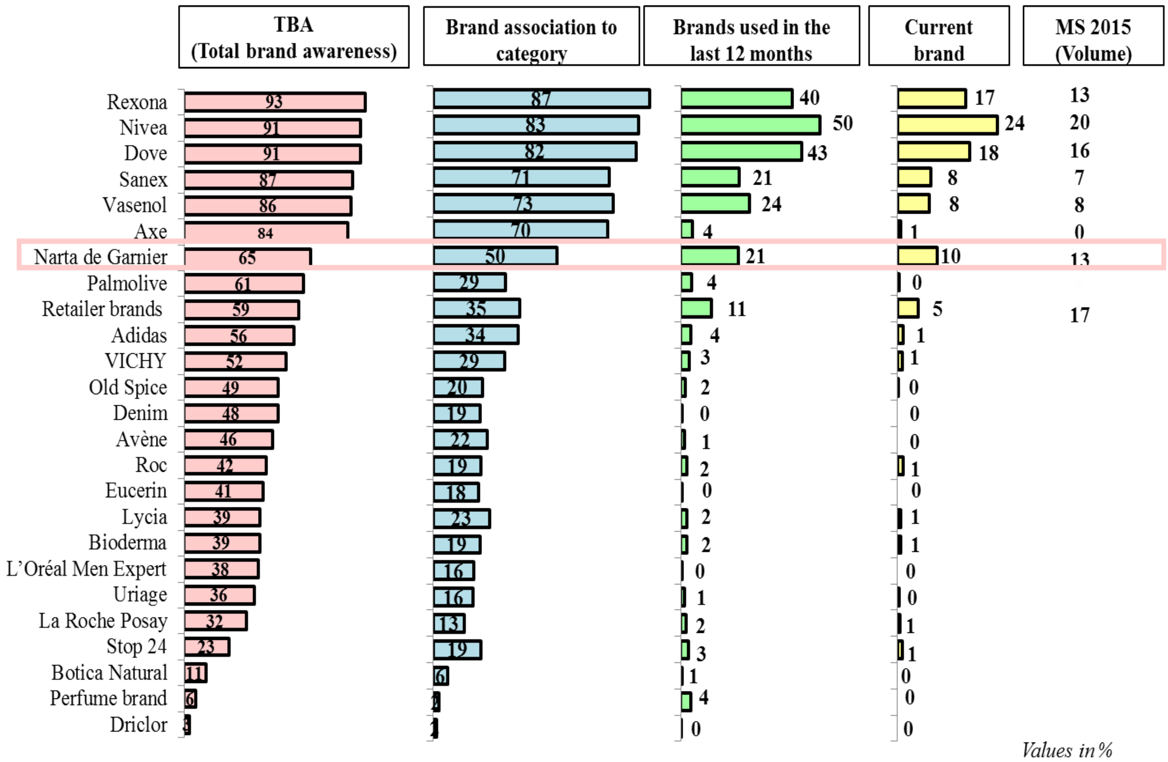


SOURCE: IPSOS U&A Deos, 2015.

The number one in both metrics is **Nivea** with 28 TOM results and 76 spontaneous mentions evidencing quite a strong brand awareness in this market. Following, **Dove** and **Rexona** keeping their position in terms of awareness and market share. Next, **Narta** has the same TOM mentions as Sanex and Vasenol but lower mentions in spontaneous awareness (23 versus 25 of Sanex and 27 of Vasenol). A clear negative result for Narta as it has a better market share than the Sanex and Vasenol. These two brands have a clear benefit for their multi-segment strategy, leveraging their awareness with investments in other categories such as shower gel and body care.

For further analysis, we sum the assisted awareness and get the **Total Brand Awareness (TBA)**. Notice that assisted awareness arise from the recognition from a list of brands the ones that the consumer knows. Considering the **Figure 23** – Relationship with the brands, we can therefore conclude a weak brand perception from female consumers about Narta in TBA.

Figure 23 - Relationship with the brands.



SOURCE: IPSOS U&A Deos, 2015.

Rexona is able to leverage its positioning thanks to the assisted awareness effect showing a strong recall of advertisement focusing on the category.

The previous highlighted pain-point for **Narta** gains a deeper dimension with this analysis, since Sanex and Vasenol surpass by more than 20 points the TBA of Narta.

Even with similar penetration (around 20%) and better position regarding the current brand (10%), Narta clearly demonstrates a lack of awareness even with twice the market share of the highlighted brands.

As important, only 50% of the respondents recognize Narta as a deodorant brand, critical when Narta only has in its national portfolio deodorant products.

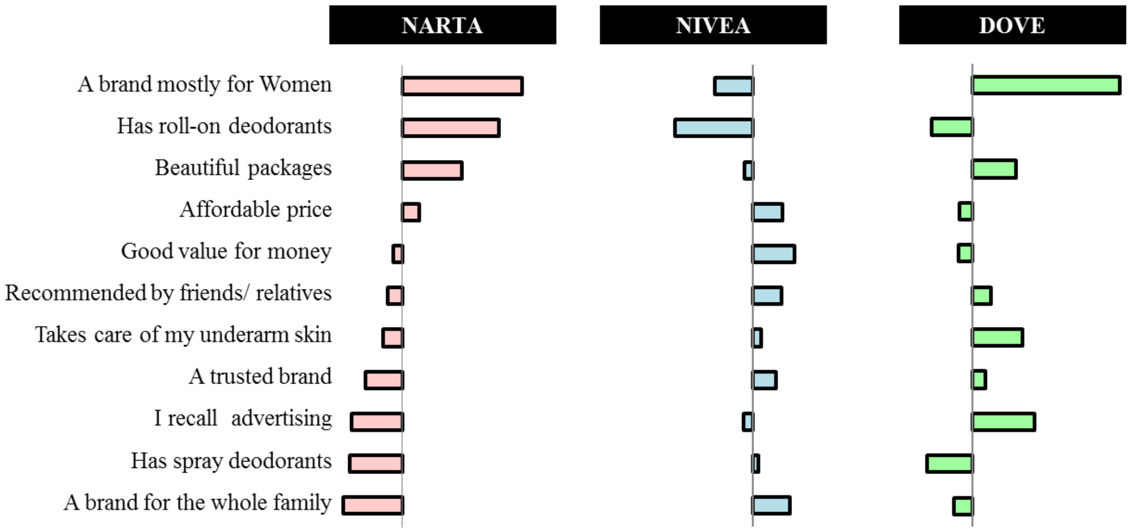
Hence, the results demonstrate a serious lack of awareness of the brand, disproportional from its market share. The consumers using Narta are not aware of the brand and do not recognize its brand equity it their purchasing journey.

8.4.2. Brand Image Analysis

The current U&A study also analysis the brand's image in both male and female segments. Focusing on the female, two types of analysis are made. The first respects the evaluation of which brand with factors related to the category (such as, trust, quality, and recall). The second coats the brand with human personality traces. As seen in the beginning of this project, this helps us to identifying the target's identification with the brand and create a persona that should be explored in an IMC.

Regarding the image of the brands related with category-related factors we can analyze the **Figure 24** – Brand's factors association, in order to get a complete picture of the context in a resumed way.

Figure 24 - Brand's factors association.



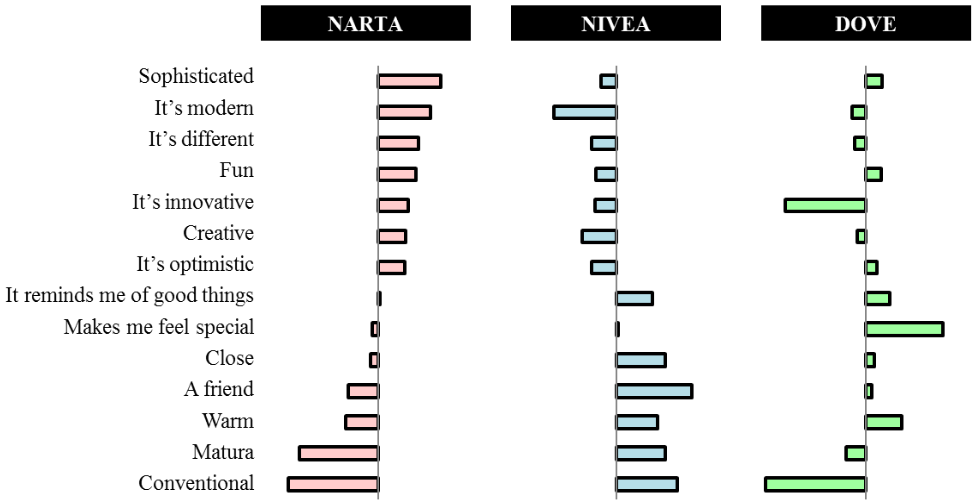
SOURCE: IPSOS U&A Deos, 2015.

Narta has a more feminine profile than Nivea but quite similar to Dove. Its differentiation arise from being associated with roll-on beautiful packages and an affordable price. However, in the key drivers for sale – recommendation, care (high relevant purchase factor), trust and recall -, Narta lacks of performance.

Translating Narta into **human characteristics** – **Figure 25** – Brand's Personification -, we can conclude that Narta is a sophisticated, modern, fun, feminine brand.

A very interesting fact arises from the following table. **Narta's personality** is the complete opposite of Nivea's, in a distinguish manner. If the personality of Narta is maximized, the brand is able to reduce the similarity conditions between itself and the market leader and might be able to reach a more important position in the consumers' mind. For that, the communication must acquire, implement and transmit these values in its conception. From the video shooting, to the tone of voice, from the colors to the expression, communicating Narta with these facts can be a key help to solve the brand's lack of awareness.

Figure 25 - Brand's Personification.



SOURCE: IPSOS U&A Deos, 2015.

A summary on the **Figure 26** highlights the main analyzed outputs for each brand.

Figure 26 - Brands' Image and Personality.

	NIVEA		Dove		GARNIER NARTA	
	IMAGE	PERSONALITY	IMAGE	PERSONALITY	IMAGE	PERSONALITY
+	For the family Good value for € Trusted brand	A friend Warm/close Mature	Mostly for women Takes care Recall advert.	Passionate Makes me feel special	For women Has roll on Beautiful pack.	Modern Innovative Fun
-	Not mostly for women No roll on	Not modern Not innovative Not fun	Not effective Not for the family	Not innovative Inactive	Not for the family **Not trusted** No sprays	Not a friend **Not close/warm** Not mature
	TRUSTED BRAND, THE BEST VALUE-FOR-MONEY AND SUITABLE FOR THE WHOLE FAMILY.		**FEMININE AND CLOSE BRAND, CARING, THAT TAKES CARE OF ME AND MAKES ME FEEL SPECIAL.**		**FEMININE, FUN, MODERN BRAND. THAT HAS GOOD LOOKING AND FUNCTIONAL ROLL ONS.**	

SOURCE: IPSOS U&A Deos, 2015.

8.5. Focus Group – Consumer Insights on the Category and its Brands

8.5.1. Category Insights

The focus group, besides evaluating the brand, gives qualitative and useful insights about the consumer's connection to the category.

Deodorants are referred as one of the most important categories in the personal care market, associated with relevant benefits not only in the individual sphere but also in the social context. Deodorants not only provide the control of perspiration and freshness but also confidence/safety, comfort and liberty.

Hence, the category has both rational and emotional benefits, even more relevant when considering that this is an essential category in the daily routine. The absence of use represents a very severe discomfort, a sense of lack of security, a fault to face the daily challenges.

Well beyond the functional benefits, the effectiveness of the deodorant gives security in the emotional area of the user since it avoids the bad odor and social constraint that arises from it, it contributes to a better self-esteem, promotes spontaneity and helps to manage daily stressful situations.

Regarding the offer, there is the perception of a vast and diversified offer either in terms of brands, references but also product characteristics' or benefits. The overall perceived quality is high, regardless the brand, giving an opinion of high effectiveness of the brands.

Some quotes that helps to understand better this conclusions. *"Deodorant is a routine, it is essential, like tooth-brushing, without it I do not feel dressed or even comfortable". "Using a deodorant is essential, it makes me feel secure with myself and also when interacting with others". "It gives me comfort, well-being, confidence, I even feel fresher".*

Analyzing the criteria for choosing a deodorant the order appears to be like: format, type of product (deodorant or anti-transpirant), Brand, Scent, Specific Benefits and Price:

(1) **Format** – It is the first criteria but not always a conscious one, usually made before the point-of-sale exposition. This decision is made with personal perception about the effectiveness of the product and the comfort of the application. It can be little influenced by external pressures. Women rather prefer roll on due to better convenience (localized application), higher hydration power (it does not dry the armpits that much), less aggressive to the skin and softer scents. Who prefers spray is due to its faster dry process

and less staining effect. The sticks and creams formats are seen as more hydrating bur also less hygienic, reason why they have that little penetration in the market.

(2) **Type of Product** – Some consumers associate the anti-transpirant feature with harmless to the health due to the presence of aluminum salts (which is not corroborated by scientific studies). Deodorants are perceived as more natural and less harming.

(3) **Brand** – Usually is half-decided before going to the shop. Choosing the brand in the POS it is only between a specific set of brands, and the consumer shifts between them. These brands inspire trust and effectiveness due to previous positive experiences. We notice also some effort to use different brands in order to avoid losing efficacy of the product. A note to the private label brands that even with a lower price range have a connotation of lack of performance.

(4) **Scent** – It has a great importance in the moment of the purchase and helps to compare the brands in question usually by opening the package and smelling it. The most common like is to soft scents that will not affect the perfume scent but still provides some scent to the skin or else it will be seen as not effective.

(5) **Specific Benefits** – For a group of consumers that look of additional benefits, beyond the perspiration control, this is quite relevant. The most common benefits are anti-stains, without alcohol and suitable for sensitive skin.

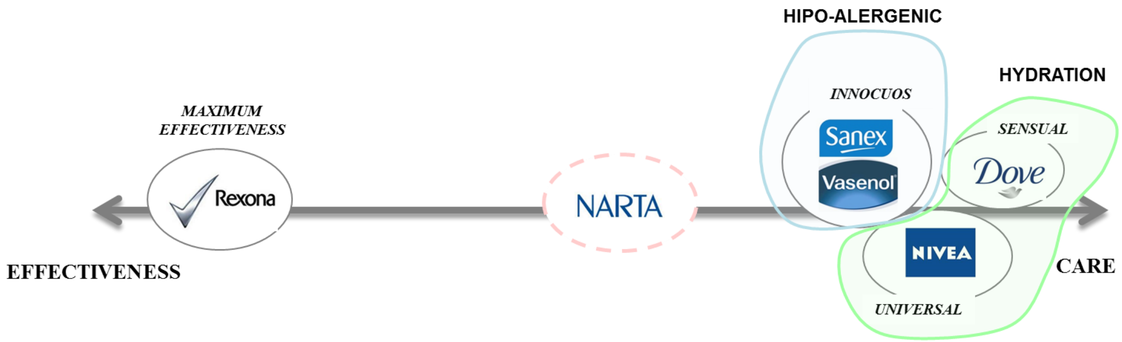
(6) **Price** – With little functional differentiation, small variations of price can lead to brand switching.

This journey will help us further on the construct the adapted IMC and brand's multi-touch points' exhibition in order to fit the consumers' decision criteria.

8.5.2. Image Evaluation

In order to fully compare the different brands the study proposed a market segmentation in 2 main criteria – **Figure 27** – Deodorant Market Segmentation-, efficacy and care as opposites. Each brand is hence classified in the axis according to the consumers' perception.

Figure 27 - Deodorant Market Segmentation.



Source: AMINTO Qualitative Test (2012)

For a better understanding of the outputs, I will briefly introduce the main conclusions about each brand in the female deodorant market.

First, **Rexona** is associated with several values all of theme regarding efficacy such as sport, strength, competition, energy, independence, dynamism, youth and innovation. It is immediately associated with efficacy due to its aggressive posture mainly expressed in the brand's communication, strongly connected with physical activity, competition and athletes.

The consumers identify Rexona as having a specialist profile: focused on the deodorant markets and with that having a better know how in this category and a high predisposition for innovation and product development (mainly due to its focused communication on the *motion sense* technology).

The slogan "*Nunca Falha*" (*never fails*) and the brand symbol causes great impact and communicate a strong and lasting efficacy – see **Figure 28**. If it were a woman, Rexona would be "*a gymnast, with strength, young, able to surprise, innovative and effective. An active, energetic women*".

Figure 28 - Rexona's deodorants.

Dove it is perceived as a caring brand, very connected with sensuality from values such as beauty, feminine, soft, hydration, sophistication, creamy, scent, caring, silk and premium. This association is often arising from the brand equity in the shower gel and body care categories.

The communication, focused on highlighting the presence of one quarter of hydrating cream, helps to enhance a perfect combination between efficacy and care. The scent, specific for this brad, is very sensorial and surrounding helped by the creamy texture perceived by its consumers.

The pack has a sober but sophisticated look, leveraging the values of sobriety, elegance, caring and hydration, exhaling many feminine symbols such as the dove and the drop of hydrating cream – see **Figure 29**.

The consumer feels a natural connection to the brand but the price appears as a blocker to the purchase. If it were a woman, Dove would be "*feminine, gracious, with two kids and a very busy family life, a bit older than Nivea, successful, around 30/40 years, calm and organized*".

Figure 29 - Dove's deodorants.

The market leader, **Nivea**, is characterized as an universal brand with values such as classic, balanced, diverse, simple, for all, timeless, trust and tradition. Nivea is a main reference in the deodorant market and in the caring aspects.

Portugal has a really strong connection with the blue box of Nivea and translates its assets to the other categories. The association is also maximized in the communication that highlights the benefits of caring and hydration of the brand's products – see **Figure 30**.

Considerer more universal than Dove to its more diverse portfolio, a broader consumer profile in terms of ages, life style and necessities and has a more balanced quality/price relations.

If it were a women, "*it could be any women, any age, it's a trustful person, a woman that can take care of herself*".

Figure 30 - Nivea's deodorants.

Analyzed together, **Sanex and Vasenol** have many similarities in their positioning. Both are considered innocuous and associated to hypoallergenic, comfort, skin's health, skin protection, deep hydration and unisex – see **Figure 31**. They are different thanks to its association to a more "pharmaceutical" universe. Also, they are embed with other categories perception and the focus on the skin's protection. The communication is focused on the healthy skin in a formal and sober way and even the product's name resemble the health promise of the brands. "*It is a classic person, a pharmaceutical woman, it does yoga, it does not use make-up, and it is a discreet woman"*.

Figure 31 - Sanex and Vasenol's deodorants.

After analyzing the competition we can state that each brand as its well defined space ant it is communicated in both packs and advertisement. This helps the consumer to identify each brand as having different personalities and characteristics.

Efficacy and Care seem to be opposites that help to define each brand key benefit. However, this is not completely true and the analysis of Narta's feedback shakes this conception of a well-divided market with no hybrid brands.

Narta, for the non-consumers, appears as an inexistent brand.

They do not recall any advertisement of the brand, associate with a feminine universe and even resemble with a private label brand.

The few non-consumers that know the brand evaluate it as having a lack of relevance in the market. The recall of the advertisement is also low among this target but the feminine association is kept. The colors, however, appear as a differentiation factor that justifies the feminine perception of the brand. In addition, a lack of presence in the point-of-sale, in terms of both presence in different retailers and shelf impact, is one of the reasons pointed for the unfamiliarity with the brand. The few that mentioned to have tried the brand pointed out a perception of lower price and a good and soft scent. These justify the absent of other purchases with the lack of differentiation factors – "*it is indifferent for me; it lacks a soul*".

In contrast, the users of **Narta** are able to point some of key elements that drove them to try and keep using this brand mainly the good relation price/quality.

Likewise they refer the efficacy, good performance, relevant benefits, soft scents and better functional aspects in the roll on format (ergonomic, lighter, easier to transport) as key purchase drivers – **Figure 32**. However the brand image appears to resemble only to this functional aspects and an image black space appears.

Narta is characterized with the absence of strong and differentiated values and little emotional involvement. Characterizing the brand as a woman it would be "*young, modern, happy, relaxed, fresh and light*".

Figure 32 – Narta's deodorants.

Concluding, Narta appears to have very little differentiating factors when compared to the others players. Even less performing brands such as Vasenol and Sanex have a clear DNA that is communicated across the different touchpoints. Narta, in contrast, it does not differentiate by the efficacy (even matching the expectations) or by the care (although it fits the desired effect). The absence of strong values, a strong signature and positioning induced a blurred brand image and a weak value proposition.

8.5.3. Communication Evaluation

Communication has a great impact on the brand equity as seen in the studies of Batra & Keller (2016).

Having that in mind is key to proper evaluate the recall of the advertisement as well as some qualitative inputs that can give some hints in this diagnosis.

Narta has a weak spontaneous advertisement recall with only a few mentions to the female protagonists of the advertisements – young, beautiful women.

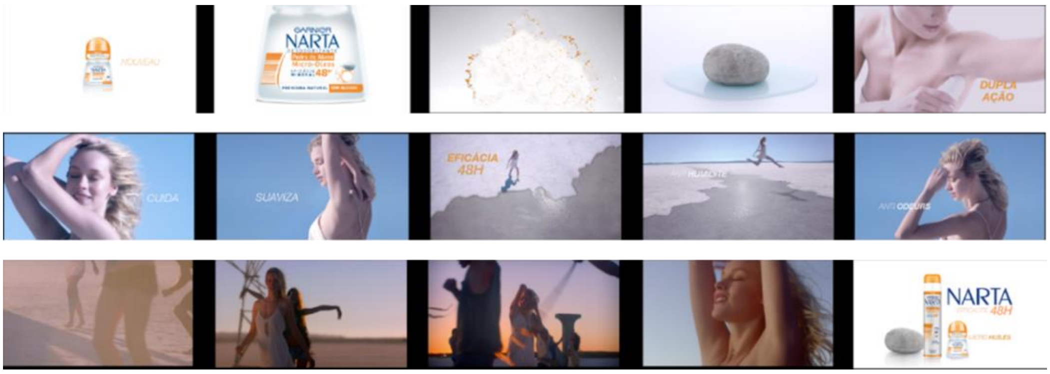
When viewed by our focus group, the ads have very little impact in comparison with the competitors' ones.

The recall is still weak and the opinions about the **television advertisement** are also negative. There is considered to be a weak appeal due to less dynamic shots, less interaction due to the absence of impactful and surrounding messages leveraged by the use of unknown expression as "*acuteine*", "*micronacares*" and "*cryo-menthol*", and an overall lack of objectivity of the main value proposition due to a diverse range of crowded information, too much descriptive.

The seized values are youth, fresh, well-being, soft that are far away from a desired impactful message. Quoting, "*Narta speaks a lot about different messages, we get lost. Dove has a clear and central message of hydration and so does Nivea. Narta talks about the ingredients, the many advantages, a lot, so it is not impactful, even looks longer*".

Also, the women characterized in the video are far away from the Portuguese life-style. They appear too much young and with a very distant life-style which hinders the identification with the advertisement. Quoting, "*she, the scenario, is way to calm, I don't resemble with that, and it is less dynamic, old*". In the **Figure 33** we can verify this inputs by comparing them with a Narta's 2015 television storyboard.

Figure 33 - Narta Pedra de Alume Television Storyboard.



When placed in comparison with Rexona and Dove's advertisements, the weakness of Narta are highlighted.

Rexona has a clear focus on efficacy, promising results in the most difficult situations, appealing to a modern lifestyle, to urban and demanding audience. It usually ends by sending a challenge and daring the consumer in an assertive way – it "never fails".

Dove in contrast focus on the hydration benefits with a powerful claim of ¼ of hydrating cream, appealing to softness, caring and beauty values. This enhances the power of their communication.

Summarizing, **Narta lacks a clear and strong message**, expressed in an assertive way, a call-for-action that resembles with its customers. More than a lot of messages and focusing on words that the audience does not know, Narta must find its assertive way to address its benefits while providing an emotional bond with the target audience.

Also, there are no **significant differences between the different brands' advertisement execution** as seen in **Figure 34**.

Figure 34 - Different brands' deodorant advertising.

8.5.4. Focus Group - Main Conclusions and Outputs

From this study the lack of performance from Narta arises from:

(1) **Weak notoriety** – Lack of awareness of the brand and low advertisement recall.

(2) **Lack of a differentiating promise and territory emotional relevant** – Consumers state an empty communication, with weak promises and no emotional bond, basing their purchase simply in a good relation of quality/price. However this relation is not enough to guarantee the performance of the brand, especially in a promotional driven market where the favorite brand are almost-always with a 50% discount offer.

(3) The only arising **value** from the brand is feminine which is not a differentiating or an added value in this category.

(4) The **language** of the brand is not clear inducing a lower perception of the brand's benefits and promises.

Despite that, we are able to point some strengths that should be maximized:

(1) **Scent** – A range of good and consensual scents, very appreciated and one of the main purchase drivers on this category.

(2) **Roll On** – The pack as good functional characteristics when compared with the competition.

(3) **Colors** – Having a color for each range helps the consumer to identify its product and greats a differentiating presence in the POS.

(4) **Competitive Price** – The good relation quality/price matches one of the main purchase drivers (price) and can break the trial barrier.

Having in mind these positive and negative outlooks there is the urgent need to find, explore and communicate in a differentiating territory.

8.6. Brand Equity Index

In this IPSOS analysis about Brand Equity Index (BEI) the main goal is to understand the strength of the Brand inside its market, considering the most relevant aspects for the consumers in that specific market. Brand Equity is defined as "*the strength of a brand in the mind of the consumer. The strength is function of all tangible and intangible properties associated with the brand which drive consumer choice over one brand over another*".

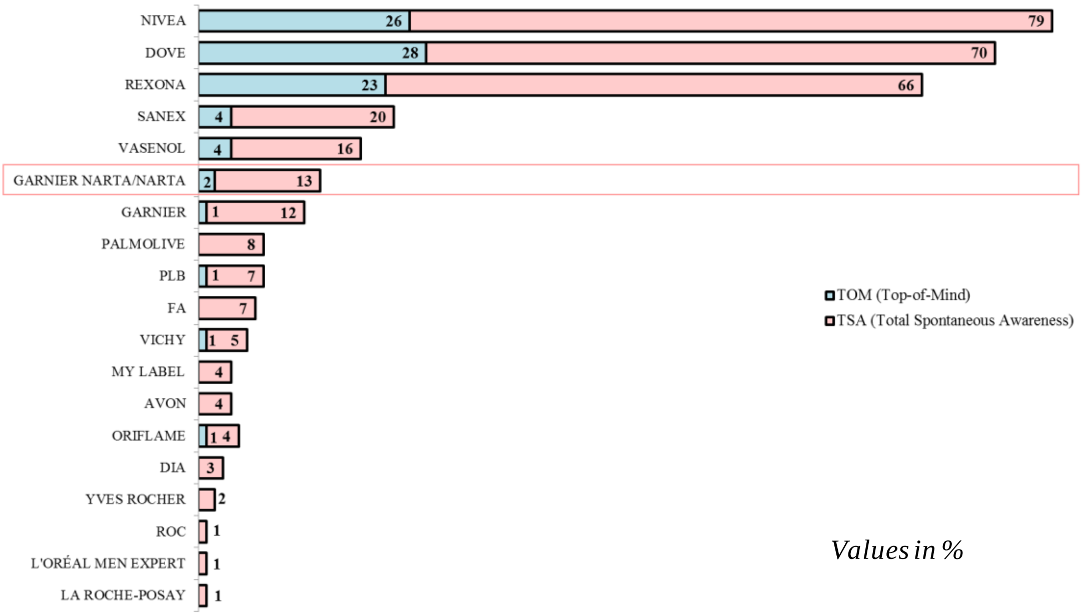
The first step is having brand awareness since it is a pre-requisite to start the relationship.

Next, brand equity in the constructs of relevance, differentiation and emotional proximity to create the relationship. Following, the value that is the direct translation of the relationship process.

Finally, other factors can affect the ultimate goal of purchase, engagement and loyalty such as the importance of the brand in the marker, market barriers (affordability, promotions, negative buzz, etc.) or external factors (distribution, availability, etc.).

First, to evaluate awareness, we study the TOM and TSA for the main deodorant brands, present in the **Figure 35**.

Figure 35 - TOM and TSA for deodorant brands.



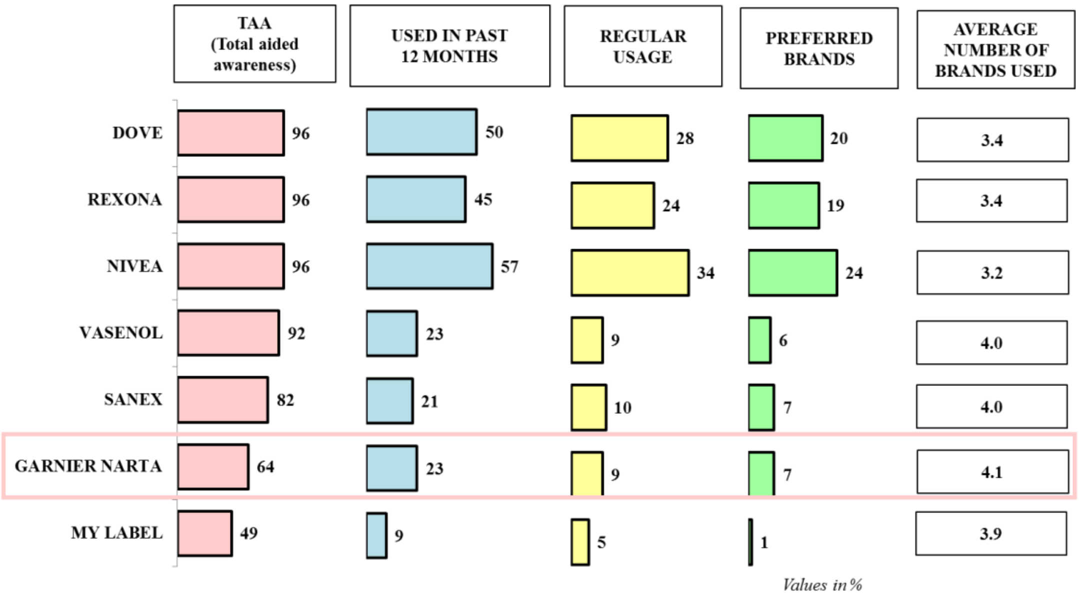
SOURCE: IPSOS, Brand Equity Index, 2014

As we can see the results are similar to the U&A conclusions. Narta has a low performance, with very little TOM and a weak TSA. Sanex and Vasenol once again surpass Narta in awareness.

To complete this analysis, we can construct a **Usage Disposition Funnel** – **Figure 36** -, which crosses **Total Aided Awareness (TAA)**, the usage in the last year, the regular use and the preferred brand.

Hence, we can understand the relationship between the brand's awareness and the usage metrics for the consumers.

Figure 36 - Usage Disposition Funnel.

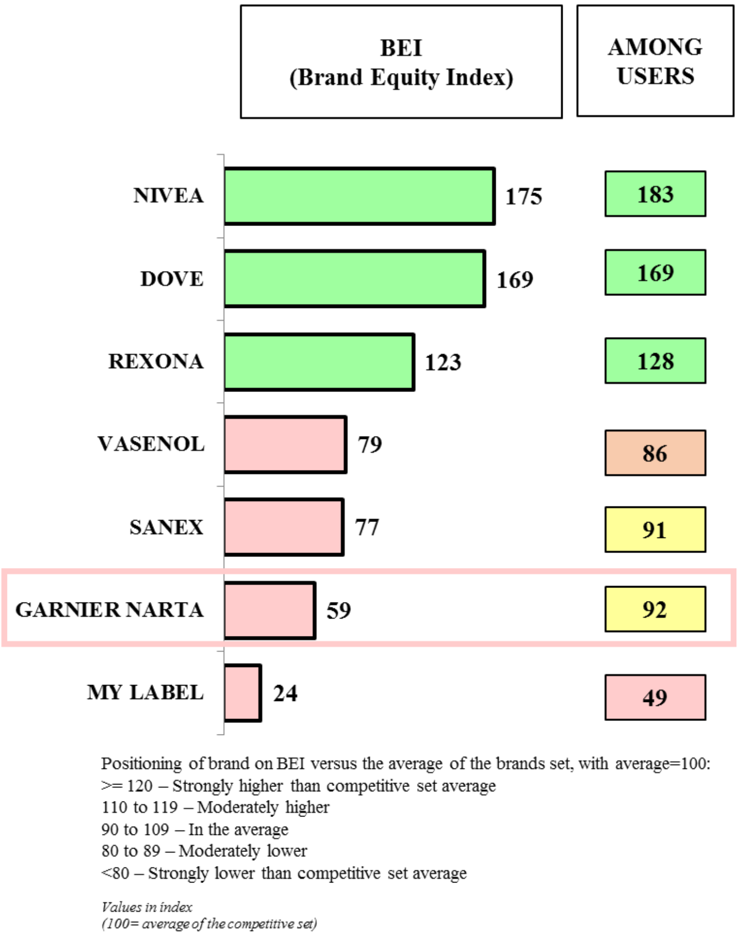


SOURCE: IPSOS, Brand Equity Index, 2014

Narta assumes once again a low position in TAA, below Vasenol and Sanex, with equal usage in the last year and a similar regular use. Also, in terms of preferred brand and regular the results between these brands are also matching. What does not match it's the considerable gap between brands in terms of net sales in the market. A last note to the average number of brands used, where Narta has the highest result indicating a lower loyalty from Narta's consumer since they use the highest number of brands when considering Narta in their basket.

In **Figure 37** – BEI overall result, we can understand the result of the BEI in the different deodorant brands.

Figure 37 - BEI overall result**.**

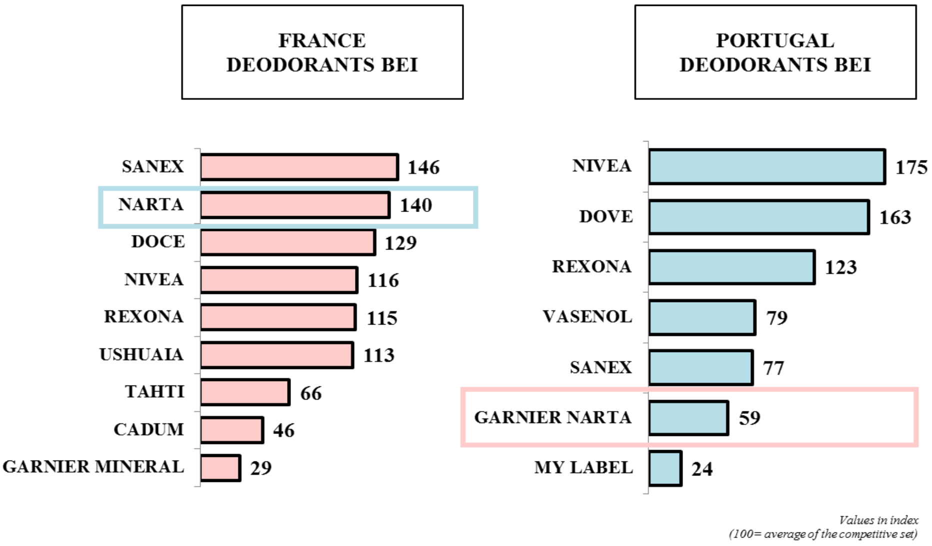


SOURCE: IPSOS, Brand Equity Index, 2014

The strongest brands are Nivea, Dove and Rexona, matching their sales ranking in the deodorant market. Followed by Vasenol and Sanex as in the brand awareness analysis. Narta has a strongly lower BEI than the competitive set, assuming the sixth position in this ranking, in contrast as the fourth position in the deodorant market in sales. A note that among users this BEI improves, indicating a good performance after you get to know the brand, enhancing the issue about the brand awareness and image.

A small note for the comparison of results with the French market present in the **Figure 38** – Portugal versus France deodorant's BEI.

Figure 38 - Portugal versus France deodorant's BEI.

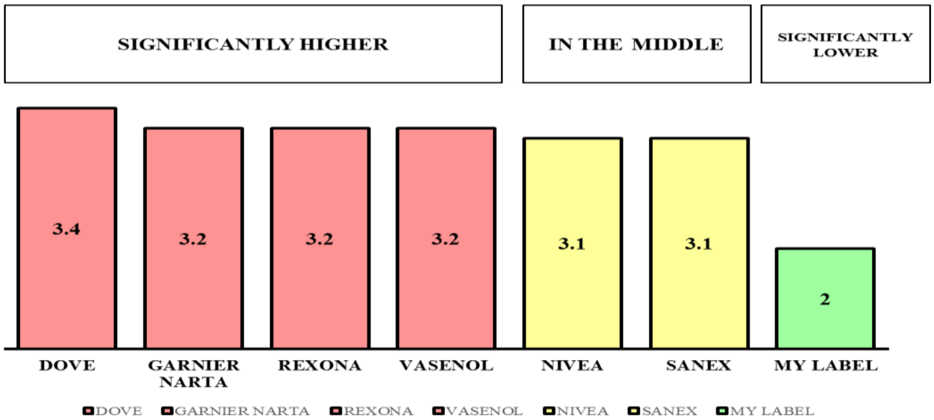


SOURCE: IPSOS, Brand Equity Index, 2014

In France, the BEI of Narta is really stronger, assuming the number two position in the ranking, following Sanex as the number one brand. However it still highlights some issue about the brand construction. Being the number one brand in the French deodorant's market for the last ten years, Narta is still not able to gain the lead role in terms of Brand Equity Index. This clearly points out a global need to rethink the brand in order to improve its image, awareness and emotional bond with the consumer.

Getting back to Portugal, we also asked about the price perception for each brand with the results of the **Figure 39** – Price perception.

Figure 39 - Price perception.



SOURCE: IPSOS, Brand Equity Index, 2014

Narta is perceived as having the second highest price in the Market, enlarging the competitiveness gap with their competitors, mainly with Nivea that points out as having the same price as the others.

The **BEI** is an evaluation of different constructs through a multi-item analysis for each one. Globally there are 20 constructs, grouped in 4 main categories, ordered by its importance for the deodorant market in the **Table 12** – Relative Importance of the BEI factors. This 4 categories – image identity, emotional benefits, functional characteristics and personality – are the main variables when analysing a brand's BEI.

Table 12 - Relative Importance of the BEI factors.

1	TRUST (19.9%)	**11**	FOR ALL AGES (3.1%)
2	SELF CONFIDENCE / PROXIMITY (14.9%)	**12**	INNOVATION (2.9%)
3	RESULTS/EFFICACY (10.9%)	**13**	PERSONALITY (2.8%)
4	ADAPTED / SIMPLICITY (6.4%)	**14**	ELEGANT / FEMININE (2.7%)
5	APPEAL / SENSORIALITY (5.1%)	**15**	MODERNITY (2.3%)
6	INGREDIENT / SAFETY (5.1%)	**16**	DYNAMISM (2.1%)
7	ASPIRATION (5%)	**17**	VALUE (1.8%)
8	BEAUTY MODEL (4.1%)	**18**	ADS (1.6%)
9	HONEST / FRIENDLY (3.8%)	**19**	ENGAGEMENT (1.3%)
10	PRESTIGE (3.2%)	**20**	HERITAGE / ROOTS (1%)

LEGEND:

IMAGE IDENTITY	FUNCTIONAL CHARACTERISTICS
EMOTIONAL BENEFITS	PERSONALITY

SOURCE: IPSOS, Brand Equity Index, 2014

The first 8 key drivers explain 66% of the global BEI, being trust, self/confidence and results/efficacy the top three factors, representing 45,7% of the BEI.

A summarized version can be analysed in the **Table 13** – Relative performance on BEI drivers, where the main drivers are considered in function of their relative importance on the deodorant market.

Table 13 - Relative performance on BEI drivers.

		BRAND ENGAGEMENT INDEX AMONG KNOWERS	NIVEA	DOVE	REXONA	VASENOL	SANEX	GARNIER NARTA	MY LABEL
			183	169	128	86	93	92	49
BEI DRIVERS	I	TRUST (19.9%)	43	28	-5	-9	-16	-28	-47
	E	SELF CONFIDENCE / PROXIMITY (14.9%)	40	20	6	-16	-14	-24	-45
	F	RESULTS/EFFICACY (10.9%)	33	17	15	-20	-13	-14	-48
	F	ADAPTED / SIMPLICITY (6.4%)	37	24	-1	-18	-21	-17	-26
	F	APPEAL / SENSORIALITY (5.1%)	34	26	8	-25	-27	0	-40
	F	INGREDIENT / SAFETY (5.1%)	37	33	-25	1	-4	-26	-47
	E	ASPIRATION (5%)	24	25	-1	-15	-20	-6	-24
	E	BEAUTY MODEL (4.1%)	36	34	-6	-22	-23	-10	-34
	P	HONEST / FRIENDLY (3.8%)	37	18	-21	-13	-3	-18	-15
	I	PRESTIGE (3.2%)	44	34	-4	-2	-21	-29	-68
	I	FOR ALL AGES (3.1%)	37	20	-18	-3	-8	-21	-30
	F	INNOVATION (2.9%)	20	27	-7	-3	-13	-10	-38
	P	PERSONALITY (2.8%)	6	10	39	-16	-21	-9	-30
	P	ELEGANT / FEMININE (2.7%)	25	41	-4	-25	-31	15	-41
	P	MODERNITY (2.3%)	9	14	20	-23	-26	22	-25
	I	DYNAMISM (2.1%)	13	19	13	-19	-24	11	-25
	F	VALUE (1.8%)	9	21	-4	-6	-4	-7	-25
	E	ADS (1.6%)	20	38	3	-19	-27	-2	-35
	I	ENGAGEMENT (1.3%)	16	23	-14	-5	0	-9	-26
	I	HERITAGE / ROOTS (1%)	87	9	-15	-4	-24	-37	-59

Values in index (0= average of the competitive set)

IMAGE IDENTITY
EMOTIONAL BENEFITS
FUNCTIONAL CHARACTERISTICS
PERSONALITY

Strongly higher than competitive set average (40 and more)
Moderately higher (20 to 39)
In the average (-9 to 19)
Moderately lower (-40 to -10)
Strognly lower than competitive ser average (less than -40)

SOURCE: IPSOS, Brand Equity Index, 2014

The **Table 13**, shows a miss performance of Narta in the top three factors. For this analysis, it were only considered the responses from the knowers of the brands. The only positive factor is modernity where Narta performed above the average.

The **BEI highlights the need to create a stronger emotional** relation with the consumers in order to improve trust and proximity and therefore increase BEI.

Additionally, the perception of efficacy should be improved as well, highlighting to good performance of the products in the diverse situations that consumer highlighted as the most critical ones (daily life moments such as, job interview, social encounters, stress, etc.).

Nivea has the best performance in both trust and proximity suggesting a powerful brand equity leverage by its multicategory presence and communication, transposing the good performance and heritage from the skin care category to the deodorant category.

Vasenol and Sanex had an overall better performance, but also negative in the three main factors.

Narta is even perceived has behaving better results than Sanex. However this two brands are not able to distinguish themselves with a positive outlook in any of the other factors.

It is also interesting to compare the **Narta's BEI in the two countries** – Portugal and France - , in order to verify if there is any different conclusion about the strengths/weaknesses of the brand in this two different market (**Table 14**).

Table 14 - Narta BEI performance in France versus Portugal.

BEI DRIVERS		*Values in index (0= average of the competitive set)*	NARTA FRANCE	NARTA PORTUGAL
	I	TRUST (19.9%)	-4	-28
	E	SELF CONFIDENCE / PROXIMITY (14.9%)	4	-24
	F	RESULTS/EFFICACY (10.9%)	19	-14
	F	ADAPTED / SIMPLICITY (6.4%)	-5	-17
	F	APPEAL / SENSORIALITY (5.1%)	-5	0
	F	INGREDIENT / SAFETY (5.1%)	-21	-26
	E	ASPIRATION (5%)	-9	-6
	E	BEAUTY MODEL (4.1%)	0	-10
	P	HONEST / FRIENDLY (3.8%)	-23	-18
	I	PRESTIGE (3.2%)	-2	-29
	I	FOR ALL AGES (3.1%)	-9	-21
	F	INNOVATION (2.9%)	-8	-10
	P	PERSONALITY (2.8%)	1	-9
	P	ELEGANT / FEMININE (2.7%)	34	15
	P	MODERNITY (2.3%)	18	22
	I	DYNAMISM (2.1%)	16	11
	F	VALUE (1.8%)	-10	-7
	E	ADS (1.6%)	9	-2
	I	ENGAGEMENT (1.3%)	-29	-9
	I	HERITAGE / ROOTS (1%)	-6	-37

IMAGE IDENTITY	Strongly higher than competitive set average (40 and more)
EMOTIONAL BENEFITS	Moderately higher (20 to 39)
FUNCTIONAL CHARACTERISTICS	In the average (-9 to 19)
PERSONALITY	Moderately lower (-40 to -10)
	Strognly lower than competitive ser average (less than -40)

SOURCE: IPSOS, Brand Equity Index, 2014

The differences are quite evident. In the French market Narta is perceives as having a positive proximity and efficacy and distinguishes itself by being element/feminine.

This is a direct effect from the communication construction that appeals to French lifestyle, elements and women portrait, increasing the consumers' identification with the overall brand's communication. In Portugal, the perception of modernity is higher and the remaining factors are in general lower than in France.

Taking in mind the **BEI** inputs we can build a SWOT analysis in order to prepare our strategic change in the brand – Figure XX – Narta's BEI & SWOT Analysis.

Figure 40 - Narta's BEI & SWOT Analysis.

STRENGHTS ***Garnier Narta (BEI:59)*** **▸ BEI among users strongly higher than average.**	**WEAKNESSES** **▸ Low spontaneous awareness (13%) compare to the 3 leaders of the deodorant market : Nivea 79%, Dove 70% and Rexona 66%.** **▸ 8th rank for aided awareness (64%). Among the 7 studied brands, only My Label has a worse aided awareness (49%). Very far behind the 3 leaders (96% for all of them).** **▸ A conversion and loyalty rates low and below the average.** **▸ A high price perception and a low BEI penalize the brand performance.** **▸ A low BEI strongly lower than average (59), even lower among 45-55 y.o. (35). Its BEI among knowers is only in the average.** **▸ Overall low position on all three BEI components.** **▸ Women who use Narta are those who use the largest numbers of brands : less loyal.** **▸ Big weakenesses on major image factors : TRUST – SELF-CONFIDENCE – RESULT/EFFICACY – ADAPTED/SIMPLICITY and on many others.**
OPPORTUNITIES **▸ Build BEI by reinforcing its three components.** **▸ Fortify its position on its strengths : MODERNITY – ELEGANCE – DYNAMISM and create its image around these dimensions : a "chic, elegant", "trendy" and "dynamic" brand.** **▸ Reassure on its many weaknesses particularly concerning top drivers.**	**THREATS** **▸ Beware of high price perception with a low BEI : a brand in difficulties on a market dominated by strong leaders.** **▸ High pressure of NIVEA and DOVE with strong awareness, strong brand engagement and solid position on many image factors. These both brands have no weakness. They are very strong particularly on top drivers. These brands control the deodorant market among every age groups and show the better conversion and loyalty rates.**

SOURCE: IPSOS, Brand Equity Index, 2014

The SWOT is a powerful tool in order to summarize the inputs of the BEI study. The goal is to be able to maximize the brand's strength while reducing the impact of its weaknesses. In this case there is an urgent need to leverage the brand's awareness, anchoring it in the three main BEI factors: trust, self-confidence and simplicity. This will help to improve Narta's Equity so it can be more competitive in the market.

At the same time, we must consider the opportunities and threats of the market while managing the new strategic guidance. In the opportunities, Narta has been pointed out as a modern, elegant, dynamic and female brand so this is an opportunity to address the market in this points as they have a high importance to our target. When it comes to Threats, Nivea and Dove have very solid positions in both awareness, engagement and image. The dominance of the market by this two major brands will definitely be a challenge that we have to address.

8.7. Diagnostic

Some of the key conclusion we have taken so far:

(1) Increasing **shopper penetration** is the main source of growth in this market.

(2) **Promotion** is one of the key drivers (3/4 of the consumers' consider promotion as an important attribute when choosing a deodorant)

(3) **Brand Awareness** has also a great impact in penetration. Narta has less awareness but twice the market share than Sanex and Vasenol. Also, 50% do not associate Narta to the deodorant category.

(4) Narta's **positioning** is in between the efficacy and care values, also expressed in the brand motto "Maximum efficacy, Narta's softness".

(5) It is also questionable the **positing** between efficacy/care since Nivea and Dove have good insights on their efficacy without harming their positioning.

(6) Narta is held back in the relevant **BEI** factors: trust, proximity and efficacy that explain 45% of total BEI.

(7) **Narta Personality** is characterizes as feminine, fun and modern differentiating itself from the direct competition. Also, the roll-on format is enhanced by its good functional aspects and colours.

Concluding there are **three main issue to tackle**: lack of notoriety/awareness, a gap towards the consumer regarding the image of quality/confidence/proximity and an absence of an interesting, relevant and differentiating positioned that can give arise to an emotional bond with the consumer.

To overcome those issues, Narta must rely on its current **strengths**. It has a distinctive shopper profile, it has a different Image on the mind of the consumers (it is feminine, fun, elegant and modern) and has a powerful colour code combined with good functional attributes of the roll-ons (that are the main format in the women's deodorant market).

The implementation must follow three critical factors: be memorable, impactful and innovative. Only then we will be able to have a great impact in the deodorant market.

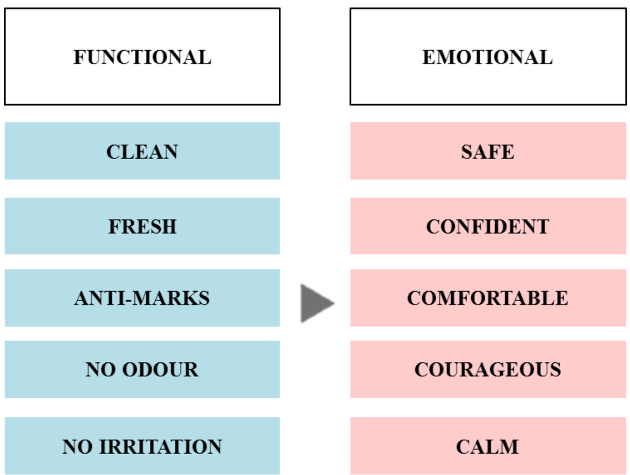
9. Forms of Implementation

Quoting Abbot (1955), "*what people really desire are not products but satisfying experiences*" and the lack of experiences provided and emotional connection to the consumer led Narta to the stagnation. After finishing the diagnosis and having in mind the important concepts of Brand Experience and Integrated Marketing Communication, a new marketing mix is proposed.

When looking again to the proposed positioning, we disagree on the differentiation factors of care and efficacy. However we believe that there is a deep connection on the functional characteristics of a deodorant and an emotional benefit for its user.

Therefore, in order to reduce the elements of brand parity and similarity, we propose for Narta a transposition from functional differentiation to emotional differentiation – see **Figure 41**.

Figure 41 - Functional versus Emotional differentiation.



Also, we need to minimize the isomorphic pressures in order to succeed according to DiMaggio and Powell (1983):

(1) **Coercive** – Arises from competition pressures but also from cultural aspects and expectation so we need to create a disruptive concept that can break through the "expect to be".

(2) **Mimetic** – The new mix should be something unique, which cannot be easily differentiated from other companies. A unique differentiation that can disrupt the market.

(3) **Normative** – It should not be something expected from the management team of a multinational company. A different adaptation of international vision will more probably lead to normative pressures and lack of uniqueness.

Following the Herzberg's inputs, this new marketing-mix should contribute to the both functional fulfillment (diminishing the dissatisfaction factor) but also leveraging emotional and additional desires in order to maximize the satisfaction. With this binary combination, our consumers will have greater motivation to buy Narta.

Having this is mind, a **new brand motto arises** – **Narta, *Nunca Baixes os Braços*** (*"Never let your arms down"*). This new signature is not meant to compete on the care/efficacy range but distinguish the brand in a second layer, beyond the care and effectiveness that are parity points. This moto combines both functional and emotional characteristics – you can raise your arms because you do not have stains or bad odor, but you do not let your arms down because, thanks to your Narta, you have the confidence, the power, the self-esteem to reach to any challenge – see in **Figure 42** the different visuals (before/after of the brand).

Figure 42 - Before/After Rebranding.

With this new Motto, the colors of the brand also change, maximizing one of the positive points of our study – the roll on colors. Now with a pink color (inspired on the Protection 5 cover), the brand is able to break the white wall and distinguish itself from PLBs. Also, each range it is maximized in media with its color but also with a positive attitude. Protection 5 is Confidence, Bio-Eficácia is Care, Fresquíssimo is Freedom, Impecável is Dare and Dry Sensation is Courage – see in **Figure 43** the different brand executions.

Figure 43 - Three Outdoor Execution Examples.

To provide a 360º complete experience of the rebranding a new marketing mix of the Brand was made.

First, regarding the **Product**, in order to express this new image, a complete pack renovation is being completed and will reach the markets very briefly. This will help to maximize the power of this new visual identity.

Second, when talking about **Price**, little can be done about with the new brand image. However, we were still able to improve the promotional leverage of the brand while helping to leverage its average price, with a new promotional typology. Previously, the promotional actions would be all to the complete brand. After, we selected the strongest brands and crossed them in promotional activities focused on the ranges. This leads to the increase of leaflet share due to a leverage of number of actions and also to a valorization of the brand as, even in during a promotional action, there is still non-promotional articles being sold.

Regarding **Placement**, this new brand image is also a new argument to towards our clients to gain more shelf space and more distribution of our products. This process in not immediate and demands many negotiations. Still, some distribution wins were conquer focusing in our main ranges and launches. To complete and having in mind the importance of POS execution, a complete new image was created, both in shelf but also in the secondary exhibition (displays for instance) – see in **Figure 44**.

Figure 44 - Narta's new POS expression.

At last, the **Promotion-Mix** was also completely renewed and an Integrated Marketing Communication Pan implemented. Having in mind the **Potential Stages in a Consumer Journey Decision** by Keller (2016) and the **Communication Matching Model** of Batra & Keller (2016), the implemented plan followed these two conceptual models in order to better leverage the Brand's Objectives. We hence expose the marketing plan for each of the steps previously described.

(1) **Feel a need or want in a category level** – Target digital advertisement and paid search in the main keywords of the category (deodorant, anti-transpirant, sweat), but also non-relatable ones (trust, arms, confidence). At the same time, display advertising in third-party websites related with the different target ranges – see an example in **Figure 45**.

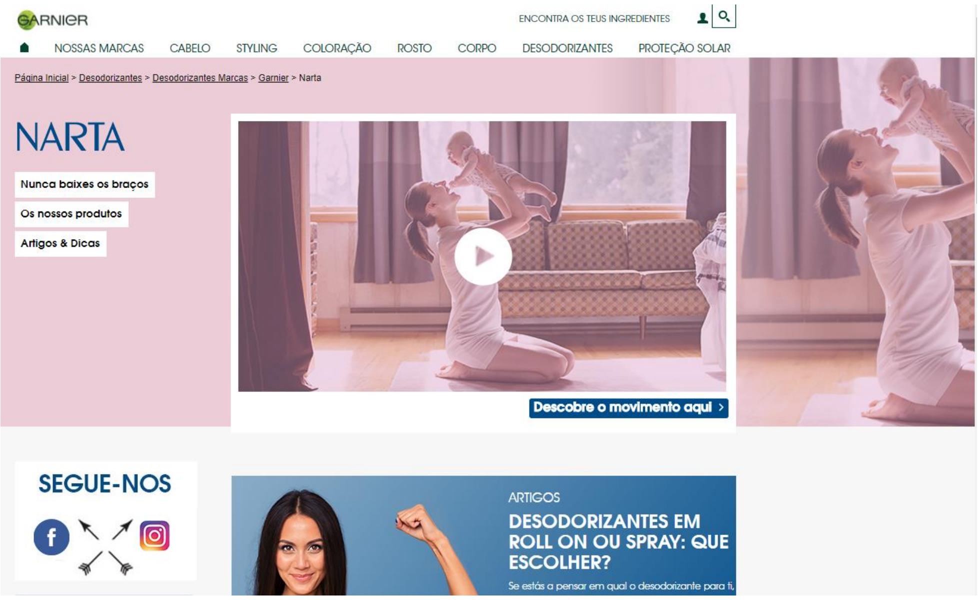
Figure 45 - Third-Party Display Advertisement.

(2) **Knowledge about it** – With the goal of generating high visibility, we kept the previous mix and complement it with an outdoor campaign in order to generate a higher awareness for the movement with static and digital *Mupis* across the country – example in **Figure 46**. Also, a new and local Television Ad was made and displayed cross-channels (10 second movie available in https://www.youtube.com/watch?v=RdnSsBxQHWk).

Figure 46 - Narta's Outdoor Campaign.

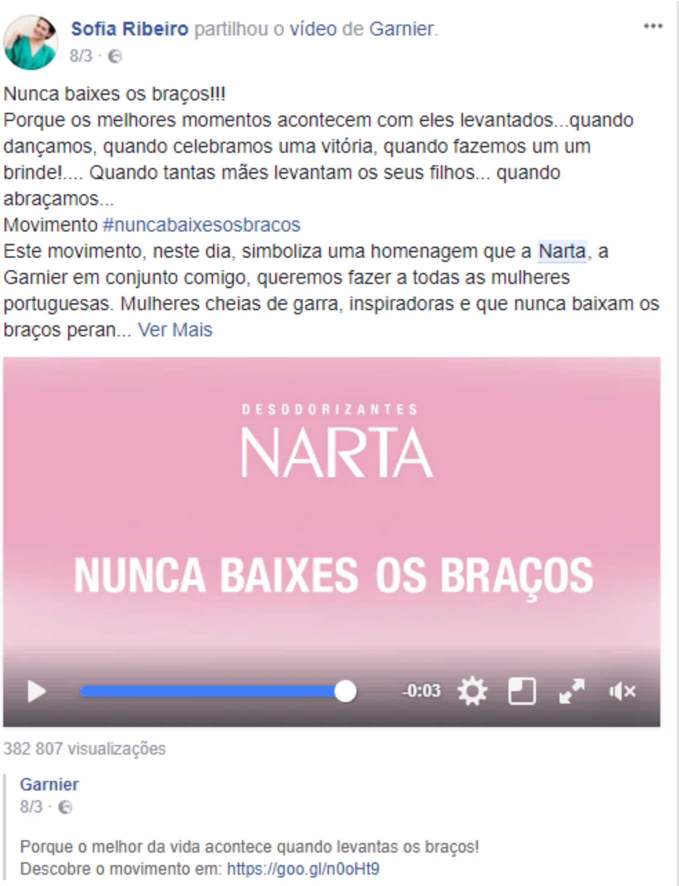
(3 & 4) **Considers it actively & Information search** – This is the step where consumers need the biggest amount of information. For that, we re-launched the website – see **Figure 47** - with a new look and feel, transmitting the brands' new values (nuncabaixesosbracos.pt or https://www.garnier.pt/desodorizantes/beleza/garnier/narta) and launched an influencer's campaign to generate social media buzz. To keep the buzz high, a manifesto video was launched to fully explain the new movement of Narta (Manifesto available in: https://www.youtube.com/watch?v=rFBI4z_2nxk&t=5s).

Figure 47 - Narta's new website.



(5) **Like, trust and confidence in the brand** – Having the need to push the trust around this movement we choose a local spokesperson to be the face of the Movement. Sofia Ribeiro became the brand's movement ambassador. Sofia choice was not only due to its high relevance in social media but also to her fighting story. She is truly a women that never lets her arms down. To maximize this association we launched the partnership in a radio presence in the International Women's Day (available in: http://radiocomercial.iol.pt/destaques/8467/radio-comercial-recebe-sofia-ribeiro-e-o-movimento-nunca-baixes-os-bracos) – 8th of March and also the official start of the movement *Nunca Baixes os Braços*. Sofia Ribeiro's own social networks our also leveraged with brand contents in order to fully express the partnership – see **Figure 48**.

Figure 48 - Sofia Ribeiro's Partnership announcement.



(6) **Will to pay** – In order to really leverage the emotional appeal we leveraged the association of Sofia Ribeiro in a Public Relations event across Lisbon – see **Figure 49**, in the main Portuguese magazines and also a Meet and Greet in our main Retailer. This will help to associate the brand with a fair-price by giving a deeper connection with the consumer.

Figure 49 - Narta's Public Relations Event.

(7) **Higher desire to act** – With the goal of promoting action and highlight the promotional moments, targeted promoted posts were launched with our retailers promotional campaigns. Not only we define the target as women from 18 to 45 but we also manage to launch a new *adset* with *geolocalization* targeting for the main shopping malls in Portugal – see an example in **Figure 50**.

Figure 50 - Promotional Online Advertising.

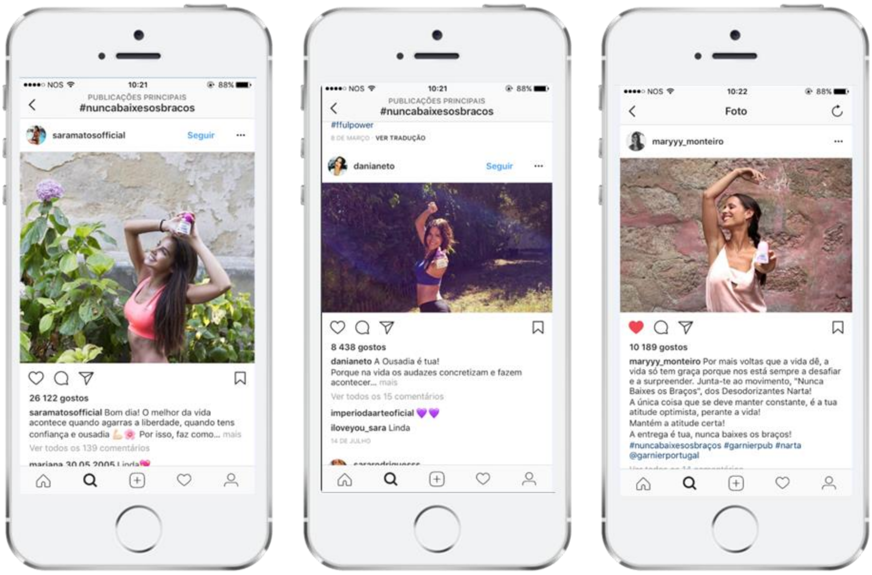
(8) **Consumption moment** – Being this the consumption moment the communication is led by the consumption place. For this we improved our POS image as seen before in the Placement-Mix.

(9 & 10) **Positive evaluation & loyalty and buying repetition** – To understand the experience with the brand a retargeting strategy was used in the second wave of the campaign in order to increase the engagement rate. In between, we reach every single users impacted with a personalized email in order to increase the positive sentiment about the brand by offering 10 Garnier Product Kits – see in **Figure 51**.

Figure 51 - Narta's Newsletter.

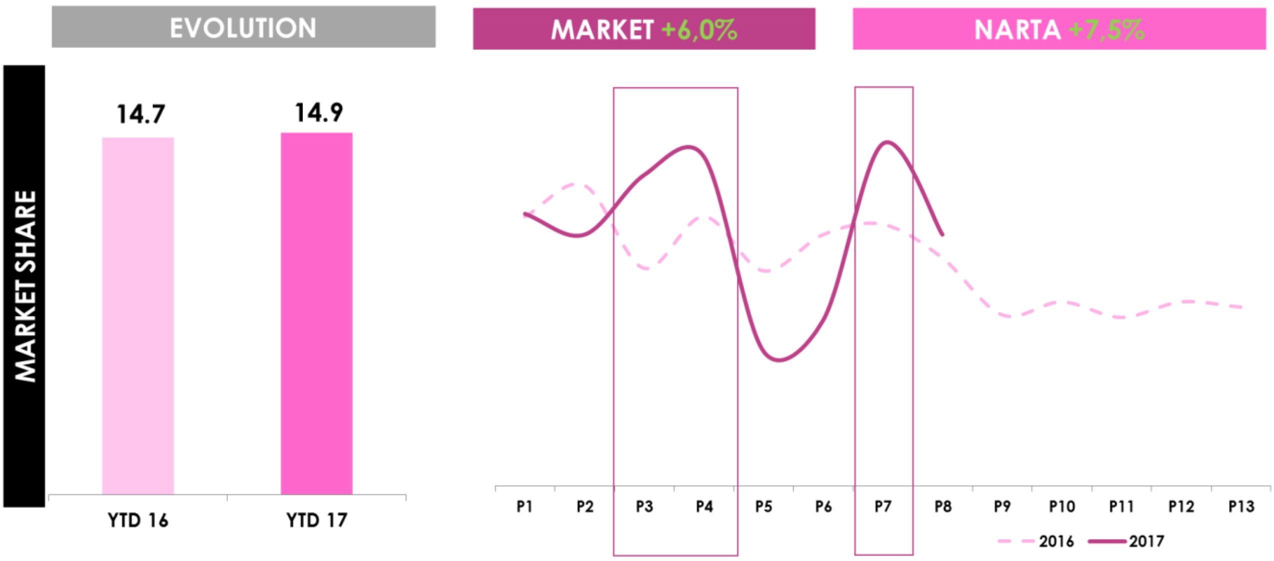
(11 & 12) **Engagement and interaction with the brand & active advocacy of the brand** – With the goal of increasing WOM for Narta, we did a second round of an e-WOM campaign with well-known Portuguese women in order to increase the advocacy desire and the brand awareness – see some examples in **Figure 52**.

Figure 52 - Influencers' posts for Narta Advocacy.



The implementation, having in mind the model had an excellent result providing Narta the best Market Share in its history (in 3rd Period – the launched of the campaign and again in 7th Period and 8th Period with the second wave) – see in **Figure 53**.

Figure 53 - Narta's Market Share Performance.



Source: Nielsen, Hipers+Supers, sales value, YTD P8, 2017

10. Conclusions

The aim of this project was to fully understand how a brand can differentiate itself in a mature market, driven by the concepts of Brand Experience and Brand Communication Management. This project was applied to a concrete business example of the deodorants' brand Narta from Garnier. This 10 years old brand in Portugal, currently market leader in France, has a under expected performance, with no visible growth in the last years. However, the conclusions from the market competitiveness draw that Narta has the required portfolio in order to have a good competitiveness, a price point aligned with the overall competitors and a promotional pressure higher than the average market. This would naturally lead to an interesting growth – which is not the case.

The deodorant market is a very important one in the Hygiene and Beauty (H&B) market in Portugal, especially when focusing our attention in the mass-market circuit where Narta acts. Deodorant is the number two market in terms of value, representing 13% of the total value of mass-market H&B value. This importance is leveraged with shopper and consumer inputs. It is considered a must have category due to a higher shopper penetration, with 55% of penetration, ranked the third category after oral care and hair care. In terms of consumer, Portugal is an Hygiene country since this categories have the highest consumer penetration when comparing with European data. Deodorants have in Portugal its biggest consumer penetration rate of 91% stating the importance of the usage of this category. With this, the deodorant category gains a critical importance in order to recruit new consumers and leverage the L'Oréal's Market Share in the H&B market.

In terms of Brand Experience Narta has several conditions leading to a situation of parity with no perceived unique value proposition towards the consumer. It is even compared with private label brands, stated to have a higher price point than its competitors giving no reason to buy it. The Isomorphic pressures are not being managed in the right way, inducing a low differentiation of the brand in the consumers' perspective.

In terms of shopper, we conclude that Narta has a younger shopper profile than its direct competitors and a considerable gap in the main KPIs when comparing with the three biggest brands in the deodorants market. When analyzing the consumer, the lack of brand awareness it the first critical point that arises. The market position in terms of sales does not correspond to the ranking of brand awareness and even brand equity index. This points out the urgent need to create a differentiated image and a more powerful emotional bond with the consumer.

Leveraging the brand equity will help to have better consideration of the consumers' and therefore a higher competitive place in the market.

Therefore the Brand Communication Management is also an urgent target for change in order to be able to maximize brand awareness and equity through a new emotional and relevant bond with the consumer/shopper.

Based on this study a new marketing-mix is proposed for the brand with the ultimate goal to leverage its performance and brand equity, demonstrating the powerful inputs that can arise when you match the theoretical framework with the business' reality.

A new brand is born with a new signature – *Nunca Baixes os Braços* (*Never let your arms down*) – inducing a new emotional differentiation that is also able to integrate the functional benefits of a deodorant. The new brand motto is accompanied by a new color code and a complete set of new communication materials.

In order to fully maximize this brand renovation it has to be expressed in the different marketing-mix variables. Therefore, Product, Price, Placement and Promotion had significant changes in order to reach the Isomorphic pressures and to attain the goal of brand differentiation in order to build increased brand equity.

The following Marketing campaign was also designed taking in account the Communication Matching Model in order to help the consumer to get through its path to purchase considering our brand as a potential buying one.

The results were very enthusiastic since this new equity allowed Narta to get its best Market Share in Portugal ever and gain a new competitive position in the market.

However the work is not completely done. The limitations of this paper must be also considered. There is no measure of the brand equity and awareness after the implementation of the new Brand Image. Also, the reduced time gap after the implementation does not allow having a complete positive conclusion about this new brand statement. Therefore, a close follow up of the brand's performance and consumer feedback must be done in the following months as also a renovation of the studies presented below in order to fully understand and measure the impact of the brand renewal in its several dimensions.

Concluding, we have a complete trust that this new image it is a disruptive statement in a market that has stopped in time, where communication differentiation was no longer there and where Narta is now, for sure, a completely new player with a unique value proposition. Narta will no longer let its arms down.

11. List of references

Aaker, D. 1991. ***Managing Brand Equity***. The Free Press: New York.
Aaker, J. 1997. Dimensions of brand personality. ***Journal of Marketing Research***, 34: 347-356.
Abbot, L. 1955. ***Quality and competition***. New York: Columbia University Press.
Ailawadi, K. L., Beauchamp, J. P., Donthu, N., Gauri, D. K., Shankar, V. 2009. Communication and promotion decisions in retailing: A review and directions for future research. ***Journal of Retailing***, 85(1): 42-55.
Anderl, E., Becker, I., Wangenheim, F., & Schumann, J. 2013. Putting attribution to work: A graph-based framework for attribution modeling in managerial practice. ***SSRN Electronic Journal***.
Barroso, A., & Llobet, G. 2012. Advertising and consumer awareness of new, differentiated products. ***Journal of Marketing Research***, 49: 773-92.
Batra, R., & Keller, K. 2016. Integrating marketing communications: New findings, new lessons, and new ideas. ***Journal of Marketing***, 80(6): 122-145.
Belch, G., & Belch, M. 2004. Parental and teenage child influences in family decision-making. ***Journal of Business Research***, 13(2): 163-176.
Berman, R., & Katona, Z. 2013. The role of search engine optimization in search marketing. ***Marketing Science***, 32(4): 644-651.
Bijmolt, T. H. A., Wedel, M., Pieters, R. G. M., & Desarbo, W. S. 1998. Judgments of brand similarity. ***International Journal of Research in Marketing***, 15: 249-268.
Brakus, J. J., Schmitt, B. H., & Zarantonello, L. 2009. Brand experience: What is it? How is it measured? Does it affect loyalty?. ***Journal of Marketing***, 73: 52-68.
Buil, I., Chernatony, L., & Martínez, E. 2013. Examining the role of advertising and sales promotions in brand equity creation. ***Journal of Business Research***, 66: 115-122.
Chattopadhyay, A., & Laborie, J. L. 2005. Managing brand experience: The market contact audit TM. ***Journal of Advertising Research***, 45: 9-16.
Chen, C., & Green, D. 2009. Marketing communications and branding: competitive hypermarket strategies. ***International Journal of Management and Marketing Research***, 2(1): 17-34.
Court, D., Elzinga, D., Mulder, S., & Vetvik, O. J. The consumer decision journey. http://www.mckinsey.com/businessfunctions/marketing-and-sales/our-insights/the-consumer-decisionjourney. Accessed on 20 October 2017.
Cronin, J., Brady, K., & Hult, M. 2000. Assessing the effects of quality, value, and customer satisfaction on consumer behavioral intentions in service environments. ***Journal of Retailing***, 76(2): 193-218.
DiMaggio, P. J., & Powell, W. W. 1983. The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. ***American Sociological Review***, 48: 147-160.
Ehrenberg, A., Barnard, N., & Scriven, J. 1997. Differentiation or salience. ***Journal of Advertising Research***, 37: 7-14.
Gopinath, S., Thomas, J. S., & Krishnamurthi, L. 2014. Investigating the relationship between the content of online word of mouth, advertising, and brand performance. ***Marketing Science***, 33(2): 241-58.
Grossmanova, M., Vojtkova, M., & Kita, P. 2009. Role of brand loyalty in purchase of sports shoes. ***Vezetestudomany***, 6: 60-67.
Hauser, J. R., Glen, L., Urban, G. L., & Braun, M. 2009. Website morphing. ***Marketing Science***, 28(2): 202-23.

Heckman, J. H. 2005. Food packaging regulation in the United States and the European Union. ***Regulatory Toxicology and Pharmacology***, 42: 96-122.
Herzberg, F., Mausner, B., & Synderman, B. B. 1959. ***The Motivation to Work***. New York: Wiley.
Hoban, P. R., & Bucklin, R. E. 2015. Effects of internet display advertising in the purchase funnel: Model-based insights from a randomized field experiment. ***Journal of Marketing Research***, 52: 375-393.
Huang, R., & Sarigöllü, E. 2012. How brand awareness relates to market outcome, brand equity, and the marketing mix. ***Journal of Business Research***, 65(1): 92-99.
Ismail, A. R., Melewar, T. C., Lim, L., & Woodside, A. 2011. Customer experiences with brands: Literature review and research directions. ***Marketing Review***, 11: 205- 225.
Iyer, R., & Muncy, J. A. 2005. The role of brand parity in developing loyal customers. ***Journal of Advertising Research***, 45: 222-228.
Joo, M., Wilbur, K. C., Cowgill, B., & Zhu, Y. 2013. Television advertising and online search. ***Management Science***, 60(1), 56-73.
Kottman, E. J. 1977. Promoting the parity product. ***Journal of Consumer Affairs***, 11: 145.
Kumar, A., Bezawada R., Rishika, R. J., & Kannan, P. K. 2016. From social to sale: The effects of firm-generated content in social media on customer behavior. ***Journal of Marketing***, 80: 7-25.
Labrecque, L., & Milne, G. 2013. To be or not to be different: Exploration of norms and benefits of color differentiation in the marketplace. ***Marketing Letters***, 24: 165-176.
Lemon, K., & Verhoef, P. 2016. Understanding customer experience throughout the customer journey". ***Journal of Marketing***, 80(6): 69-96.
Lemon, K. N., & Nowlis, S. M. 2002. Developing synergies between promotions and brands in different price – Quality tiers. ***Journal of Marketing Research***, 39: 171-185.
Levitt, T. 1966. Innovative imitation. ***Harvard Business Review***, 44: 63-70.
Luxton, S., Reid, M., & Mavondo, F. 2014. Integrated marketing communication capability and brand performance. ***Journal of Advertising***, 44(1): 37-46.
Maidani, E. A. 1991. Comparative study of Herzberg's two-factor theory of job satisfaction among public and private. ***Public Personnel Management***, 20: 441.
Naik, P. A., & Raman, K. 2003. Understanding the impact of synergy in multimedia communications. ***Journal of Marketing Research***, 40: 375-388.
Osinga, E. C., Leeflang, P. S. H., Srinivasan, S., & Wieringa, J. E. 2011. Why do firms invest in consumer advertising with limited sales response? A shareholder perspective. ***Journal of Marketing***, 75: 109-124.
Parker, P. M., Tavassoli, N. T. 2000. Homeostasis and consumer behavior across cultures. ***International Journal of Research in Marketing***, 17: 33-53.
Rahman, M. 2014. Differentiated brand experience in brand parity through branded branding strategy. ***Journal of Strategic Marketing***, 22(7): 603-615.
Reichheld, F., & Sasser, E. 1990. Zero defects: Quality comes to services. ***Harvard Business Review***, 68(5): 105-111.
Rhee, J., & Johnson, K. 2012. Investigating relationships between adolescents' liking for an apparel brand and brand self congruency. ***Young Consumers: Insight and Ideas for Responsible Marketers***, 13(1): 74-85.
Schmitt, B. H. 1999. ***Experimental Marketing***. New York: The Free Press.
Shukla, P., & Banerjee, M. 2013. The direct and interactive effects of store-level promotions on impulse purchase: Moderating impact of category familiarity and normative influences. ***Journal of Consumer Behaviour***.
Singh, S. 2006. Impact of color on marketing. ***Management Decision***, 44: 783-789.

Thaichon, P., & Quach, T. 2016. “ntegrated marketing communications and their effects on customer switching intention. ***Journal of Relationship Marketing***, 15(1-2), 1-16.
Thaichon, P., Lobo, A., & Mitsis, A. 2014. An empirical model of home internet services quality in Thailand. ***Asia Pacific Journal of Marketing and Logistics***, 26(2): 190-210.
Zarantonello, L., & Schmitt, B. H. 2010. Using the brand experience scale to profile consumers and predict consumer behavior. ***Journal of Brand Management***, 17: 532-540.