

Shan Foods: One Biryani, One Family

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Source: The WARC Prize for Asian Strategy, Entrant, 2019

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Food mixes brand Shan Foods ran a TV-led campaign promoting progressive values to appeal to young Punjabi women in Pakistan.

- Shan lacked presence in the country's most conservative region, Punjab, where its main competitor reigned, so it aimed to increase sales, value share and penetration by improving perceptions of its brand.
- Despite gender stereotypes shoehorning them into domestic roles and making them primary decision makers responsible for purchases, many young Punjabi women want to join the workforce, so the brand knew that aligning itself with progressive values would make it more appealing to them.
- A video that flipped the familiar arranged-marriage situation on its head – featuring a man winning over his prospective in-laws through culinary prowess – was spread through TV, social media and OOH, and celebrities were partnered using musical.ly.
- The video received more than 25 million views, sales grew by 26%, market share increased 2.7%, and brand perceptions improved across all metrics, culminating in Shan attaining market leadership.

Campaign details

Brand: Shan Foods

Brand owner: Shan Foods

Lead agency: Ogilvy Pakistan

Country: Pakistan

Industries: Convenience, readymade

Media channels: Outdoor, out-of-home, Social media, Television, Word of mouth, influencers

Budget: 1 - 3 million

Executive summary

Shan Foods, a food mixes brand that tops the list in Pakistan's progressive South, managed to take over the reluctant and tradition-proud Punjabis by challenging the patriarchal splits in the region through its communication – in the process accomplishing an astounding 26% sales growth and a 2.7% increase in its national market share that successfully turned it into a national leader in the category.

For a country that is one of the most ethnically diverse in the world, it's no surprise that food tastes are quite varied across different regions.

Such was the problem for Shan Foods, a household name in Pakistan's progressive South but suffered a negative bias in the tradition-proud province of Punjab where Punjabis believed Shan's products to be too distinct from their preferred taste palettes, instead favouring the competition.

Punjab being the largest province in Pakistan, this negative bias prevented Shan from becoming a national leader in the category for recipe mixes.

Despite that, Shan was able to break this negative perception, win over the hearts of Punjab, beat the competition and seize the throne of market leader.

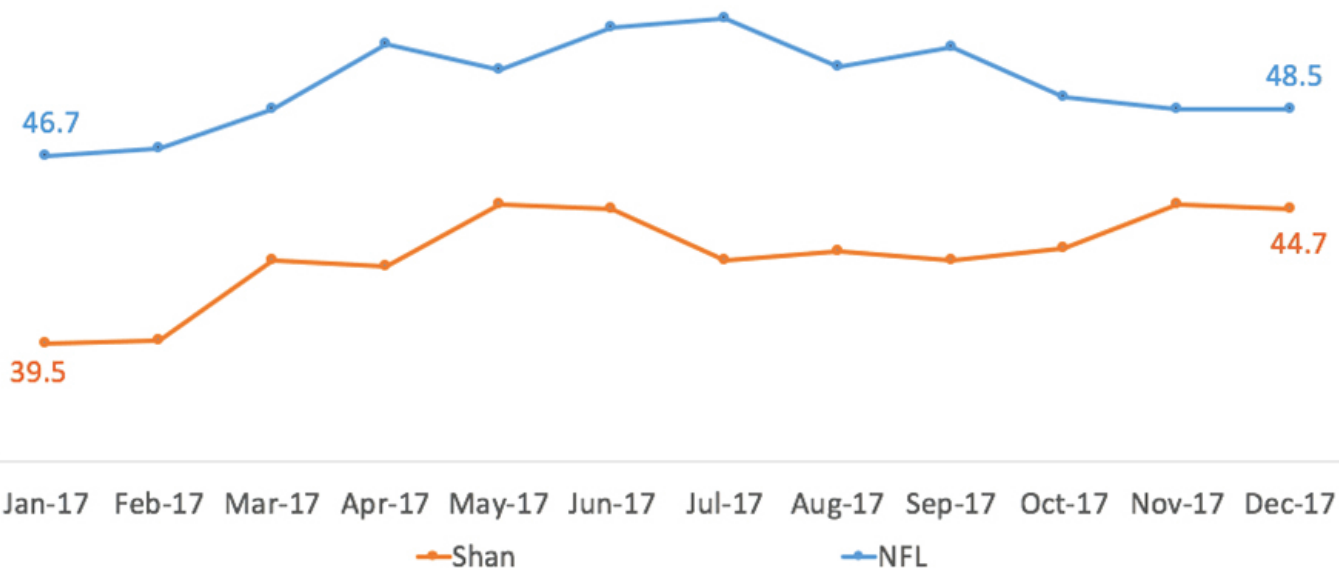
Market background and cultural context

King of the castle but not king of the country

Shan Foods is one of the leading culinary brands in Pakistan but unfortunately its presence in the category was dependent on one region only, the South. Nationally, it fell behind its biggest and closest competitor, National Foods Limited (NFL), whose nationwide leadership was a result of its dominance over the country's largest province in terms of size and population: Punjab, which contributed 42% of overall category sales and housed over 56% of Pakistanis. In Punjab, NFL held 69% share and Shan held only 21.8%, a number which continued to drop as NFL's kept getting stronger in the Punjab region. Shan could never become a 'national' brand if it didn't manage to capture Punjab.¹

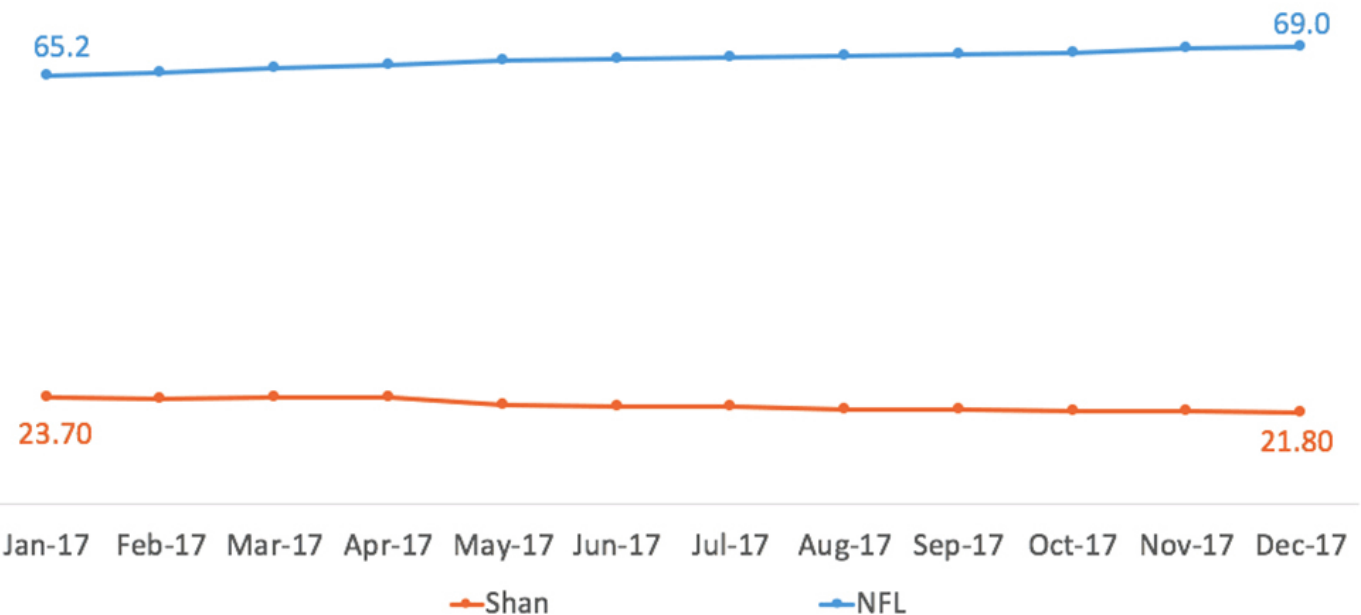
Value Share - Pakistan

Source: Shan Retail Audit Data



Value Share - Punjab

Source: Shan Retail Audit Data



Shan: an outsider to Punjabis

While Shan had continually been making efforts over the years to break NFL's hold of Punjab, its efforts had remained stubbornly ineffective. Research suggested that Punjabis had strong loyalty towards National Foods' products that was driven by an irrational bias against Shan. Users quoted many reasons – Shan products being 'too strong & spicy' being the most common one – however, blind taste tests proved these notions to be untrue. The reality was revealed that Punjabis saw Shan as an 'outsider' in their homes, and their preference for National Foods' product was due to their familiarity with the brand (a first mover in the category) and its taste. This 'outsider' perception was preventing Shan from becoming a national leader and Shan had to change this

mindset if it had any chance of taking on National Foods in its own territory.^{2,3}

Objectives

Business objective

In December 2017, category growth was 15% in Punjab and 9% in Pakistan. In order to increase share and achieve dominance, Shan had to exceed category growth:

1. Achieve sales growth of 15% in Punjab and 20% in Pakistan.
By Q4 2017, value share in Punjab fell by 1.9% and national market share grew only by 1.2%, setting them at 45.4% and 21.8% respectively. In order to stunt the decline, targets were set to:
2. Increase value share by 1.5% in Punjab and gain category leadership at a national level.

Brand objective

Shan's trial metrics were stuck at 73% in Punjab while NFL held 93%. In order to penetrate Punjab, Shan had to increase trial amongst Punjabis thus reducing the gap between Shan and NFL:

3. Increase brand penetration in Punjab by increasing trial to 85%.

Perceptual/behaviour change objective

4. Change the negative 'outsider' perception in Punjab by Q4 2018, garnering positive perceptions by improving the power score metrics of 'meaningful', which stood at 78, and 'difference', which stood at 90.

Insight and strategic thinking

Punjab, the largest province in Pakistan, is also the most conservative one. While other regions have seen steps taken towards modernisation, Punjab has held strongly to its traditions, many of which were patriarchal in nature. Gender roles seem to be clearly defined in households, with most women adopting the traditional housewife role as they are judged harshly on their cooking skills with little to no appreciation of other skills they might have, thus encouraging the attitude that 'the kitchen is a woman's bastion'.

Since the problems stemmed from Punjab, we targeted young Punjabi homemakers between the ages of 18-35 who were, in most households, the primary decision makers (most, if not all, kitchen decisions were theirs), which makes them the most important target in this category.

But as we researched and spoke to young Punjabi women, we noticed a very progressive mindset amongst them. They expressed strong desires to join the workforce and even contribute to household expenses. Much of this changing mindset can be attributed to progressive influencers in the media that promote gender equality. But the tradition-bound Punjabi belief system restricted them from evolving their role beyond that of a homemaker. This left these young women conflicted and frustrated, believing that they will forever be bound to

the kitchen.⁴

Within this conflict, we were able to identify an opportunity that would enable us to win over our Punjabi audience on an emotional level by becoming an agent of change against regressive divides. As a challenger brand, we found our opportunity to challenge this negative stereotype in a way that could change people's perceptions, for the better.

Creative and/or channel execution

Activating our philosophy

With our campaign, we wanted to challenge a culturally ingrained stereotype and drive progressive mind-sets. In order to do so, we had to do something out of the ordinary to get noticed in a way that garnered the support of young housewives.

We used an emotional storytelling method to execute our campaign with a long format TV commercial with the tagline 'Khushiyan Chakh Lo', which translates to 'Taste Happiness'.

Bringing an 'outsider' into our kitchens

In Pakistan, we have a very strong culture of arranged marriages, the most high-stakes situation for any Pakistani woman is meeting her prospective in-laws, where she will be sized up and judged based on everything, especially her cooking.

Our plan was to leave Punjabi audiences speechless, to get them out of their comfort zone by showing them a protagonist they had never expected to see at the centre of any food commercial, let alone, as a protagonist in the kitchen. Instead of using a typical housewife, we showed someone who is normally considered an 'outsider' in the kitchen, and we showed him as highly skilled in the art of cooking and winning hearts through it – something only a woman was seen as or expected to be.

Using a conventional situation to drive home an unconventional point

We flipped the familiar arranged marriage situation on its head by showing a man arriving at his prospective in-laws' house, being humorously judged by every male member of the family and eventually getting dismissed (after a series of tests) just because he is not one of them – an 'outsider' and not 'man enough' by their criteria. Luckily for him, they get in a situation where he gets the chance to display his culinary prowess by cooking – the best Biryani they had ever tasted in their life – and save the day! This act melts away the irrational, negative bias they had formed of him and instantly gains the approval and acceptance of his overly-masculine future brothers in-laws. The creative intent was to make Shan stand for positive change that breaks patriarchal gender divides – all through the power of its authentic taste.

Along with TV (still the primary medium to reach out to audiences in Pakistan), there were accompanying OOH adverts too. But since our main focus was on young progressive women, it was crucial to have an extensive digital plan for the campaign as well, which was activated through the most popular social media platforms (YouTube, Facebook, Instagram) while using the hashtag #OneBiryaniOneFamily to execute online engagement

activities.

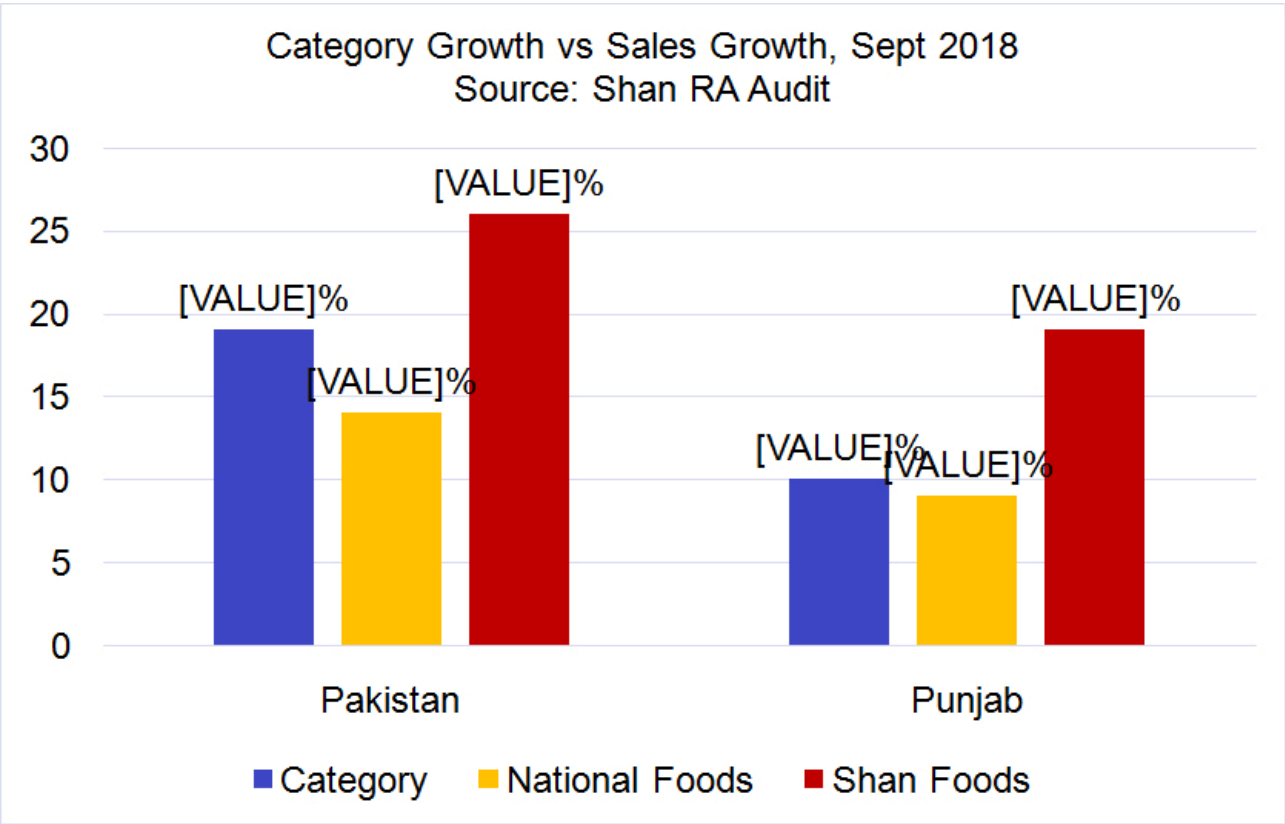
Online advocacy

In Pakistan, celebrities are the most effective influencers and their use can have far-reaching impacts. While Shan has never used celebrities in its TVCs, they were used to advocate the campaign through an online engagement activity using musical.ly.

Performance against objectives

1. Shan sales grew faster than the rate of category growth in both Pakistan and Punjab.

From 2017 – 2018, Shan's countrywide sales grew by 26% (category growth was 19%) while National Food's grew by 14%. Similarly, in Punjab, Shan's sales grew 19% (category growth was 10%) while National Foods grew by 9%.



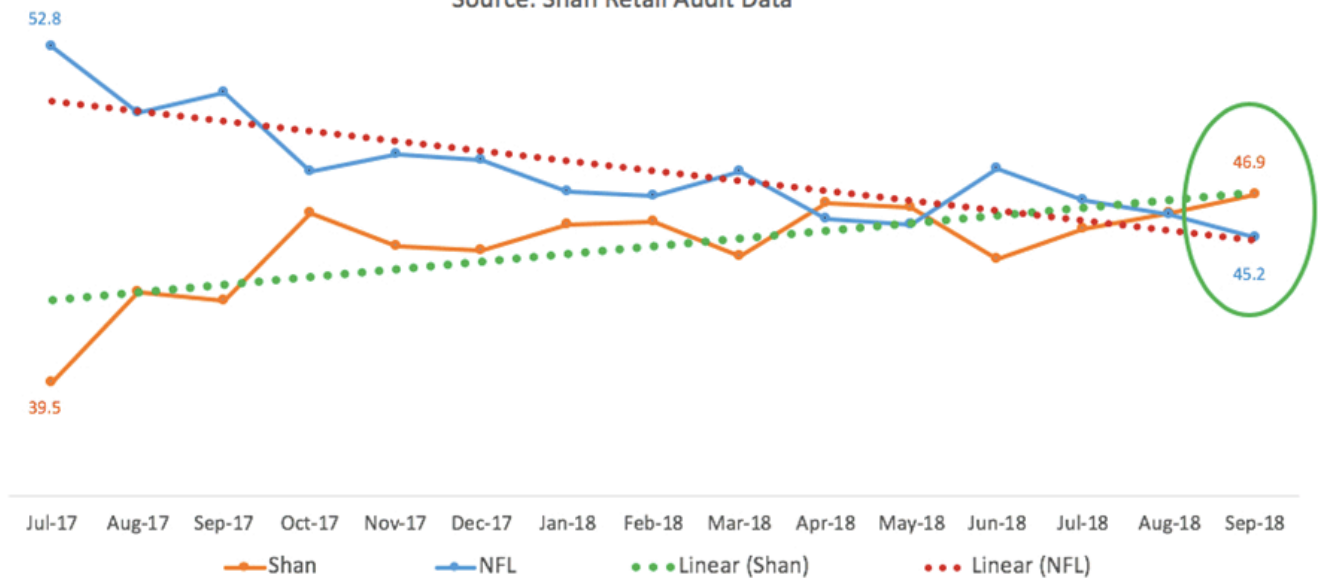
2. Shan's overall market share increased while NFL's market share fell enough for Shan to exceed NFL, making Shan the category leader in Pakistan.

By September 2018, Shan's value share grew 1.3% nationally, making it the category leader at 46.7% overall market share. Parallel to that, NFL's value share fell 1.5% on a national level, putting it at 45.6% overall market share.

While it is too soon for Shan Foods to be able to become the dominant players in Punjab, this effort arrested the falling share in Punjab and in turn made it grow by 2.3%, taking it from 21.8% to 24.1%. For the first time in years, NFL's share in Punjab declined, falling by 2.4% and taking it from 69% (in the previous year) to 66.6% in September 2018.

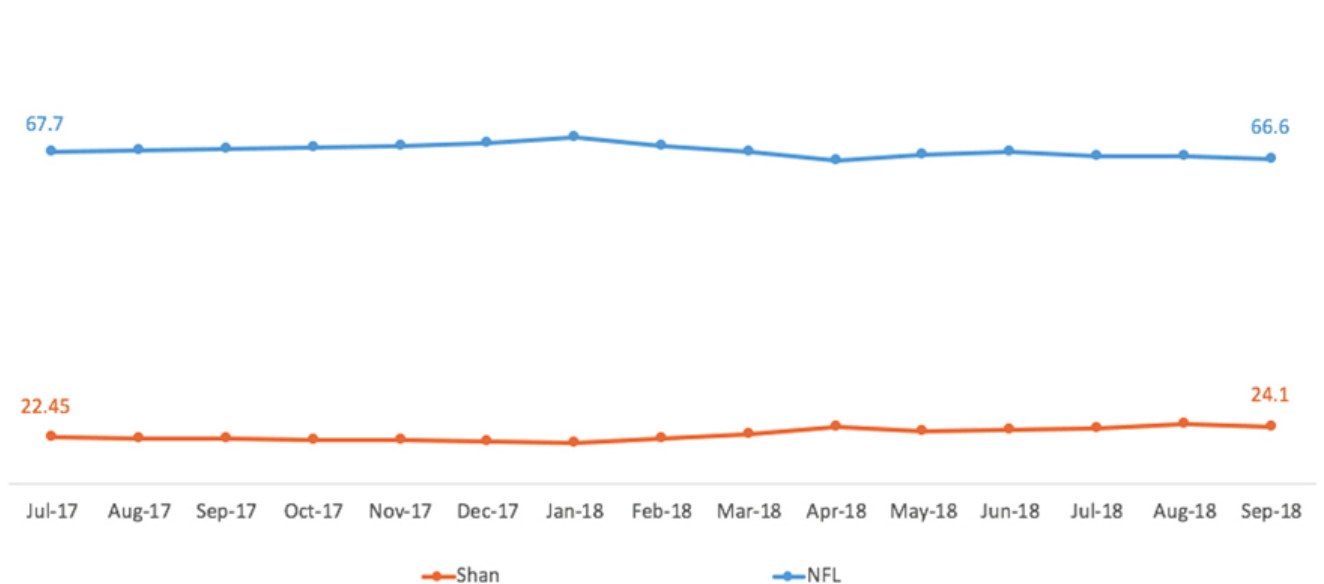
Value Share - Pakistan

Source: Shan Retail Audit Data



Value Share - Punjab



Source: Shan Retail Audit Data



3. Brand penetration in Punjab increased significantly.

Shan's trial metrics in Punjab increased 8% in a single quarter, the biggest increase it had seen in years.

Purchase Funnel - Punjab

	<u>Q2 2018</u>		<u>Q3 2018</u>	
Awareness	100		99	
Ever Tried	79	79%	87 	88%
Current Usage	38	48%	43	49%
Loyalty	21	55%	27 	63%

Source: Shan Brand Health Tracker August 2018

4. **Shan successfully built positive perceptions of its brand and products.**

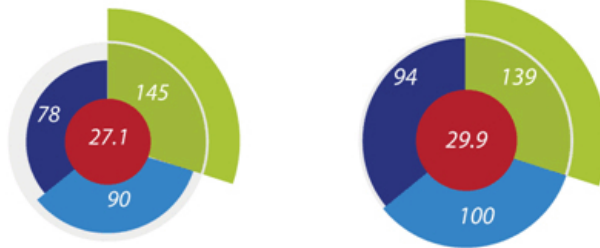
Shan became a loved brand for Punjabis and removed negative perceptions surrounding its products, which is evident through a 16 points increase in 'meaningful' score (now at 94) and a 10 point increase in 'difference' score (now at 100). At the same time, NFL's 'meaningful' score fell 13 points and 'difference' score remained stagnant.



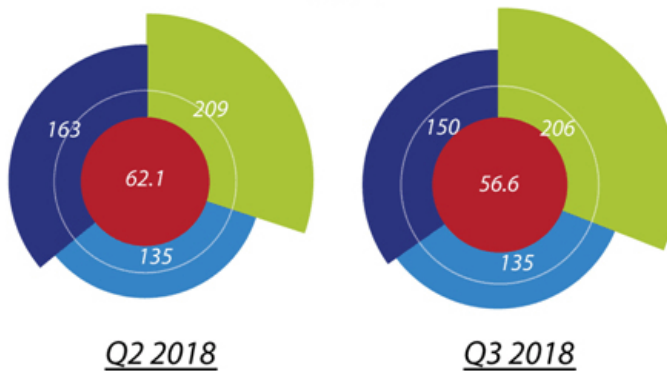
Brand Power Scores

Source: Shan Brand Health Tracker August 2018

Shan



NFL



■ Meaningful ■ Difference ■ Salience ■ Power ■ Index

5. The campaign became the talk of the town on social, as intended.

The TVC instantly went viral, garnering over 25 million views on Facebook and 4.2 million views on YouTube. It sparked many conversations on social media where women loved Shan portraying a man in the kitchen. The story was also lauded by several news publications for its bold move in challenging gender stereotypes.

"It (Shan's TVC) gives a positive message that guys can cook and that too with passion. We need this sort of exposure in our society. There is a wonderful message in this ad." – Mahwish Khalil (Source: Facebook)

Lessons learned

While most of the developed world is moving towards big data and analytics to drive insights on consumers, the most unique insights are still gained from more traditional methods of research.

For years Shan had been struggling to figure out why its sales were suffering against competition in Punjab and continually made efforts to gain market share with only minor results. But after conducting focus groups and speaking to women directly, Shan realized that the problem lay in the taste, which did not fit the Punjabi taste palette. But standard taste trials proved this to be wrong where most tasters could not differentiate the taste of Shan against the competition. That is where our general understanding of our consumers developed and led us to believe that an unjust stereotype existed against the Shan brand. A bias that came from a group that had

been suffering unjust stereotypes against them as well. That is where our strategic thinking and creative problem-solving ability came to the rescue and we decided to use an analogy that broke our biased mind-sets, of who's role it is to be in the kitchen and which brand is better than the other.

As a challenger brand, you can't survive if you don't take a bold, disruptive yet relevant stance. We rode against the rules of Pakistani advertising – where women are always shown 'happily' conducting household chores – by making an ad for a food brand... with not a woman in sight. It is also important for any brand looking to win over the hearts of their consumers, to have a purpose. A purpose that embodies their struggles and at times takes charge of changing the world around them for the better.

Client's view

"Having gained ascendancy through a series of bold, clutter-breaking and norm-challenging campaigns, it was important to leverage this success to drive business and communication objectives home. The One Biryani One Family campaign was a strategy masterclass, empowering us to break stereotypical boundaries and risk polarising our audience by addressing them in the most direct way possible. All this yielded great results in delivering on equity and market share results for us in the Punjab region."

Sources

1. Shan retail audit data.
2. Agency primary qualitative research (country-wide focus group discussions with women).
3. Shan central location testing (held in Punjab).
4. Agency primary research.

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