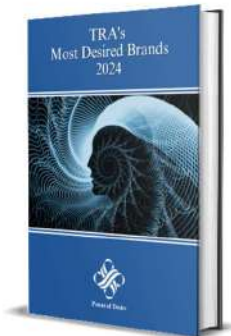


UNDERSTANDING TRA'S BRAND DESIRE REPORT 2025 METHODOLOGY

The brands in Most Desired Brands 2025 were chosen for their ability to captivate consumers' penchants, creating a magnetic allure. Desire naturally precedes buying and signals a consumer mind fertile and ready for purchase. Since desire is difficult to quantify, sales often become the success indicator. From 2007 to 2010, TRA engaged nearly 300 psychologists, sociologists, and communication experts to decode Brand Desire and has since measured it through a proprietary Brand Desire Matrix, refining this metric over the past 10 years.



For over 13 years, TRA has conducted syndicated research with consumer influencers, the top 10% of the population who typically sway the remaining 90%, to gauge their brand-related Desire. Beyond measuring conscious desire, the Brand Desire Matrix also captures the subconscious desire consumers hold toward a brand. TRA's studies take consumers' perceptions through the ultimate test of brand rating on the sensitive barometer of Brand Desire.

Now in its 10th edition, TRA's Most Desired Brands 2025 report is based on 12 brand behaviors of Brand Desire, conducted among 2,521 consumer influencers across 16 major Indian cities. TRA pioneered the study and measurement of Brand Desire, a powerful force that creates a magnetic, irresistible allure. Brands that foster true Desirability attract loyal customers and transform consumers into ambassadors. Desire and magnetism stem from a brand's inner radiance across its multi-dimensional facets. In today's competitive landscape, these listed brands have succeeded in enchanting consumers by sparking desire in their minds.

DATA COLLECTION

Over 300 fieldwork personnel gathered data through face-to-face interviews across 16 cities, with an average interview time of about 30 minutes. Three and a half lakh data points were collected, revealing over 4,000 unique brands from the study. TRA's survey utilizes a purpose-built app, which not only captures brand data more accurately than Paper-and-Pen Interviews (PAPI) but also records multiple aspects of the interview to facilitate:

- Respondent authentication
- Voice Recognition
- Geo-Location
- Timestamping
- Home-door pictures/visiting cards

TRA insists on data accuracy with multiple levels of scrutiny. The interviewer testing, process quality, 100% back-checks, stringent quotas, and data inspection at all phases, ensure extreme scrutiny.

ABOUT THE QUESTIONNAIRE

A well-designed questionnaire is crucial to any quality syndicated research, especially when capturing consumer perceptions on something as subtle as Brand Desire. The Brand Desire questionnaire has three parts:

- a) First, respondents name 15 brands that come to mind across local, national, and multinational brands. This encourages them to retrieve various brands into active memory along with their interconnections, reducing selective recall.
- b) The second part centers on brands and the 12 Brand Behaviors of Brand Desire. This differs from prior years, where 36 attributes were measured, adjusting to Covid-related time constraints. For each behavior, respondents name three brands best representing each Brand Behavior, showcasing subconscious desire.
- c) The third part focuses on brand recall, prompting respondents to share brands they desire, capturing 'Conscious Desire.' Additionally, respondents provide the category for each brand and a suitability score on a 5-point scale, generating a numeric Desire score. TRA's Brand Desire Matrix, a widely respected brand model, reorients strategy into a fully consumer-centric approach. While most metrics cover market share, brand value, and growth, the vital yet intangible elements of Brand Desire often go unmeasured. Over the years, TRA's Brand Desired Report data has given leading Indian and global organizations invaluable insights, helping them stay competitive and relevant in these dynamic times.

FINDING THE RIGHT RESPONDENTS

The respondents of this study are consumer influencers—10% of consumers who impact the brand decisions of the remaining 90%. To ensure the questions captured insights from these influencers, several distinguished standards were applied. Additionally, three distinct respondent groups influencing brands were chosen for the study.

The three major respondent groups included Salaried Males, Salaried Females, and House Influencers.

The other criteria for selecting respondents were as follows:

GENERAL CRITERIA

1. Age criteria – 21 to 50 years
2. SEC criteria – A / B only
3. House influencer criteria
 - ❖ English & one local/ regional language proficiency with above 3 out of 5 scores based on speak, read & write
 - ❖ House influencer influence score to be 4 out of 5 in each of the below criteria
 - ❖ Purchasing electronic item/s at their House Recommendation on branded products purchase done by their friends
 - ❖ Selection of the next education institution for her child/ward
 - ❖ Residing in a society with 100 or more flats

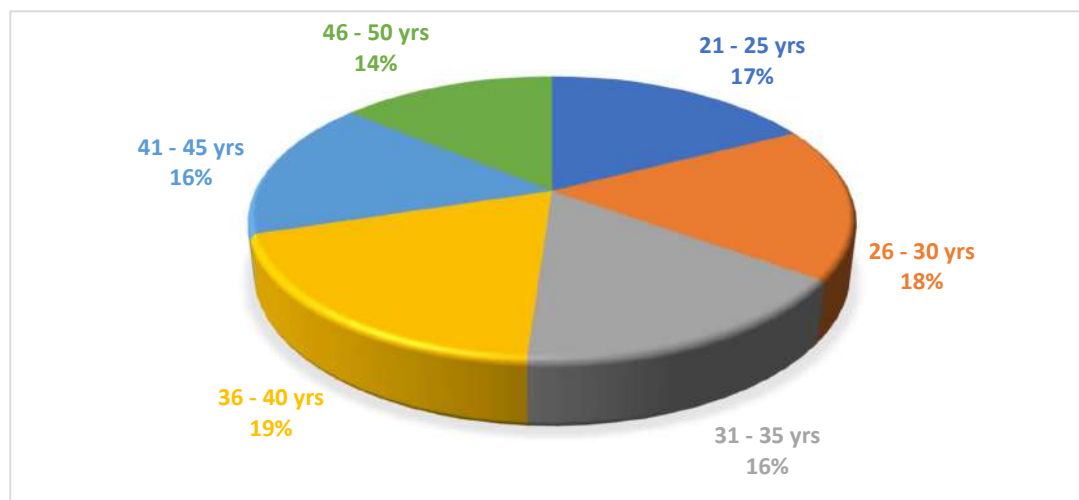
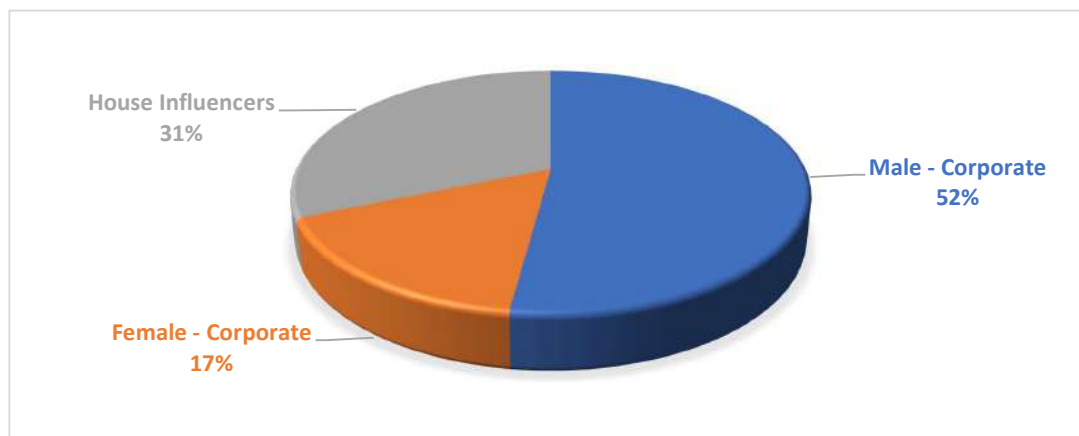
4. Salaried respondents' criteria

- ❖ Monthly salary income of more than INR 20,000/-
- ❖ Must be employed in an organization having: more than 200 employees across branches (pan India) OR must be in an organization having more than INR 50 Crores turnover
- ❖ Must not be employed with a courier company, Public Relations, Market Research, Advertising, BPO, or KPO
- ❖ Not more than 15 interviews to be conducted in any one organization across its offices in India

SAMPLING CRITERIA

Gender and age-based criteria

The gender and age sampling were done based on the census division among the 16 cities. Among the women, the House influencers and salaried women were in the ratio of 30.7% & 16.2%.



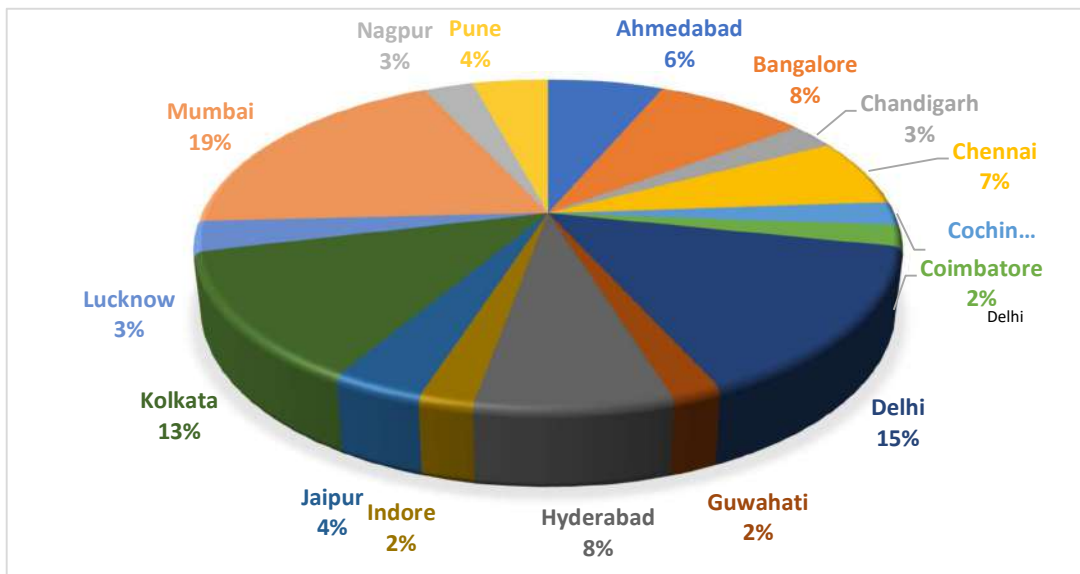
METHODOLOGY

INDIA'S MOST DESIRED BRANDS 2025

City Based Criteria

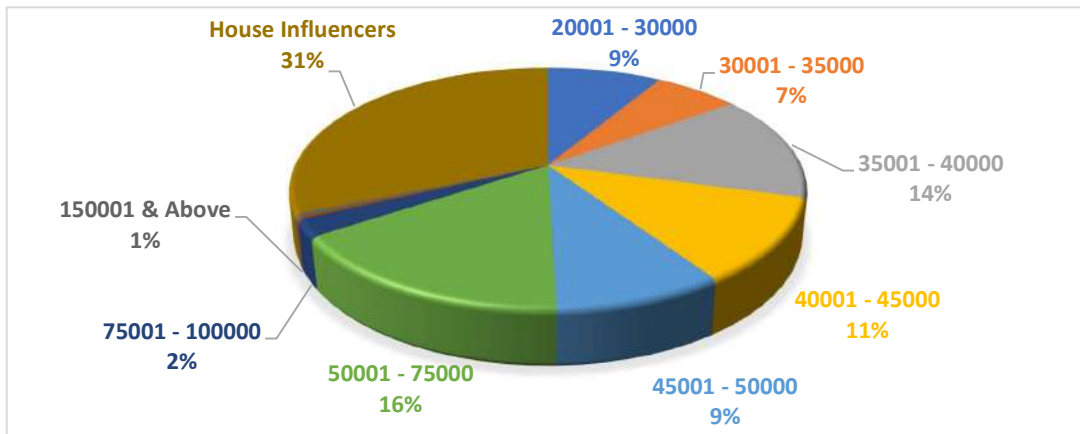
Sixteen cities were selected for the survey, representative of urban India. The number of respondents sampled in each city is proportional to its GDP, as it was most representative of transactions in the city.

North	East	West	South
Delhi	Kolkata	Mumbai	Chennai
Lucknow	Guwahati	Pune	Hyderabad
Chandigarh		Ahmedabad	Bengaluru
Jaipur		Nagpur	Coimbatore
		Indore	Kochi



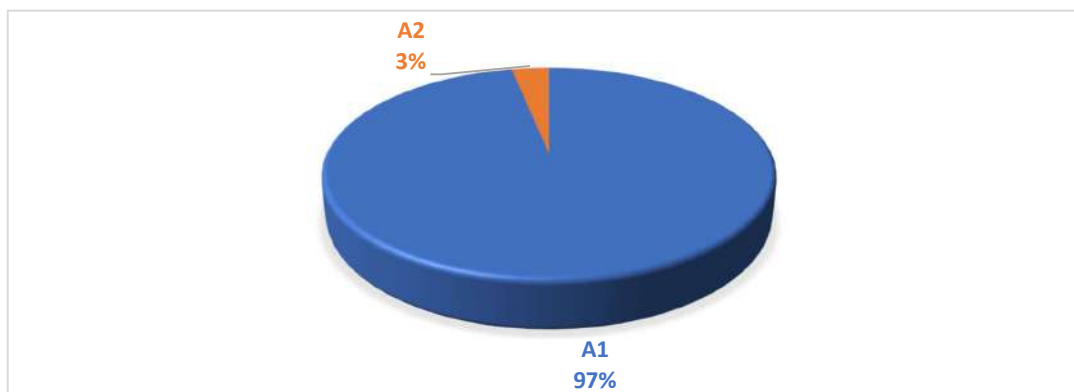
INCOME BASED CRITERIA

The respondents had a monthly income exceeding INR 20,000 as shown by the graph of income distribution given below



SEC-BASED CRITERIA

1547 (60.8%) respondents were from SEC A1, 34.8% were SEC A2, 3% respondents were from SEC A3 and 1.41% were from SEC B1& B2



UNDERSTANDING THE BRAND DESIRE MODEL

TRA set out to develop a method for quantifying Brand Desire by first identifying its core attributes. Over three years, we consulted hundreds of psychologists, sociologists, anthropologists, and communication experts to understand desire. Following empirical and pilot testing, TRA created the Brand Desire Matrix, encompassing 36 intangible Attributes. These were grouped into 12 Behaviors, ultimately converging into 4 Foundations of Desire.

<u>Communication Desire</u> Brands create Communication Desire solely by implementing what we-see, hear, and know through the impact of communication.	1. Charisma 2. Trust 3. Oration
<u>Rational Desire</u> In order to demonstrate Rational Desire, Brands must demonstrate logically deduced conclusions. Communicating rationally appeals to the cognitive intellect of the audience, demonstrating infallibly, the reason for belief.	1. Relevant Utility 2. Conscious Effort 3. Creativity
<u>Aspirational Desire</u> It is through the pursuit of nobler goals that the Brands develop Aspirational Desire, which transfers the feeling of aspiration to others.	1. Winner's Attributes 2. Social Maturity 3. Self-Control
<u>Emotional Desire</u> Emotions create feelings - deep-seated physiological and psychological sensations that assist us in relating to a situation, adapting to it, or coping with it.	1. Positivity 2. Emotional Maturity 3. Hope

Calculation of Desire Index:

The statistics of measuring Brand Desire is quantified at three levels. The levels are Attributes, Brand Behaviors, and overall Brand Desire.

The statistical analysis of the big dataset has been no small task. To understand how the statistical analysis was done, deconstructing the Brand Desire Index is the first step. By collating the data and then using the Brand Desire Index, we are able to gain a point-of-vision for the rest of the data.

Over the years, the index calculation has been continuously fine-tuned to have greater sensitivity and relevance. TRA's Indices are a subtle measurement and take into account the visible and invisible Brand Desire influences. Our research necessitated a detailed primary research among consumer-influencers to understand their brand associations with the Brand Desire attributes. This had two parts - the first was created using the four most necessary variables arising from the 36 primary components of Brand Desire. The four parameters were – standard deviation of suitability, position average (whether it was mentioned as the first, second, or third choice for the specific primary component), the suitability average score of the brand, and number of occurrences.

This part of the Brand Desire Index® can be represented as:

$$\frac{SD_o}{SD_i} \times p_{5i} \times o_{5i} \times \bar{X}_{5i}$$

The other direct and visible influence on Brand Desire was the brand's frequency (how many times a brand name occurred), position (whether it was stated first, second or third among the three brands mentioned) and weighted suitability (how relevant the brand was to the attribute on a scale of the first influence on Buying Propensity. The second part of the influence is represented as:

$$p_{7i} \times o_{7i} \times \bar{X}_{5i} \times 0.67$$

The addition of these gave us the Brand Desire Index, represented by the following formula:

$$\frac{SD_o}{SD_i} \times p_{5i} \times o_{5i} \times \bar{X}_{5i} + p_{7i} \times o_{7i} \times \bar{X}_{5i} \times 0.67$$

Where:

SD_o represents overall brand suitability score standard deviation

SD_i represents all ith brand suitability standard deviation

O_{5i} represents ith brand occurrence frequency of the Brand Attractiveness questions

P_{5i} represents ith brand average positions of Brand Attractiveness questions

X_{5i} represents the ith brand average suitability

O₇ represents the brand frequency of occurrence of the Recall question

P_{7i} represents all ith brand average positions of the Recall question.

SOME IMPORTANT APPLICATIONS

1. Power of Desire symbol – Over 200 brands license the 'Power of Desire' symbol as an official rating and incorporate it into their marketing communications.



2. Buying Propensity Report – Many brands commission TRA for consumer buying analysis to inform more data-based decisions in marketing and communication. Some brands leverage the Buying Propensity Report for strategy discussions in board meetings, while investment bankers and PE funds use this data to guide investment choices in other brands.

3. Introspective intervention – A key use of TRA's Brand Desire methodology has been in bespoke studies commissioned by brands, involving stakeholders and using The Brand Desire Matrix to align internal actions with stakeholder Desire.

4. Brand De-risking consulting – A primary risk for brands is the erosion (or lack of growth) in Brand Desire, with larger brands especially vulnerable. India's leading brands address this concern through TRA's Brand De-risking studies, strategies, and approaches.