

VODAFONE

INDIA

Marketing & Brand Guide

Market Trends · Brand Identity · Competitive Landscape

Fiscal Year 2024–25

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Prepared by: Strategy & Brand Marketing Division
Vodafone Idea Limited | Mumbai, India

1. Executive Summary

Vodafone India, operating under the brand Vi (Vodafone Idea Limited), is one of India's three major telecommunications operators. This Marketing & Brand Guide outlines the strategic direction, market positioning, and brand governance framework for FY 2024–25. The document is intended for internal teams involved in marketing, communications, product development, and commercial strategy.

Vi operates in one of the world's largest and fastest-growing telecom markets, with over 1.4 billion people and rapid digital adoption across urban and semi-urban geographies. The brand's mission is to connect India, empower communities, and drive the digital economy through accessible, reliable, and innovative communication services.

Vi's Vision: Connecting Every Indian to a Better Tomorrow

2. Market Trends & Analysis

2.1 Indian Telecom Market Overview

India's telecommunications sector is the second-largest in the world by number of subscribers, with approximately 1.17 billion wireless subscribers as of mid-2024. The market is dominated by three private operators — Reliance Jio, Airtel, and Vi — alongside BSNL, the state-owned operator. The industry has witnessed massive consolidation over the past decade, reducing the number of players from over a dozen to just four.

Metric	Value (2024)
Total Wireless Subscribers	~1.17 Billion
Internet Subscribers	~900 Million
4G Subscribers	~700 Million
5G Subscribers (emerging)	~80 Million+
Tele-density	~84%
Monthly Data Usage per User	~20 GB
Average Revenue Per User (ARPU)	INR 140–200

2.2 Key Market Trends

2.2.1 5G Rollout & Network Evolution

India officially launched 5G services in October 2022, with rapid spectrum deployment across Tier-1 and Tier-2 cities. The 5G subscriber base has grown significantly, with Jio and Airtel leading standalone and non-standalone 5G network builds. Vi is expected to commence 5G rollout following its ongoing fundraising and network modernization efforts. 5G is anticipated to unlock enterprise use cases including smart manufacturing, connected healthcare, and smart city applications.

- 5G coverage expected to reach 50+ cities by end of FY25 for major operators
- Spectrum bands in use: Sub-GHz (700 MHz), mid-band (3.5 GHz), mmWave (26 GHz)
- Enterprise 5G services — network slicing, private 5G — emerging as high-value segments

2.2.2 Rising Data Consumption

India's mobile data consumption continues to surge, driven by affordable data tariffs, widespread smartphone penetration, and a young, digitally active population. Short-form video (Reels, YouTube Shorts), OTT streaming (JioCinema, Hotstar, Netflix), and online gaming are primary demand drivers. Per-user monthly data consumption has risen from under 5 GB in 2019 to over 20 GB in 2024.

- OTT video accounts for 60%+ of total mobile data traffic in India
- Online gaming subscribers growing at 25% CAGR
- Vernacular content fueling digital adoption in Tier-2 and Tier-3 cities

2.2.3 Premiumization & ARPU Improvement

After years of aggressive price wars sparked by Jio's 2016 entry, the industry is entering a premiumization phase. Multiple tariff hikes across all operators in 2023–24 have lifted ARPUs. This trend is positive for Vi as it aims to improve revenue and achieve EBITDA profitability. Higher-value postpaid plans, family bundles, and enterprise offerings are being prioritized.

Operator	Approx. ARPU (INR)	YoY Change
Reliance Jio	182	+12%
Airtel	208	+15%
Vi (Vodafone Idea)	145	+10%
BSNL	90	+5%

2.2.4 Convergence of Telecom & Digital Services

Telecom operators are increasingly becoming digital service providers. Beyond connectivity, players are investing in fintech (payments, microloans), cloud services, IoT platforms, and content bundles. Vi's partnerships with OTT platforms (Netflix, Amazon Prime, SonyLIV) are central to its value proposition, transforming SIM cards into digital lifestyle subscriptions.

2.2.5 Rural & Semi-Urban Expansion

With urban markets saturating, Tier-2 and Tier-3 cities and rural India represent the next growth frontier. Government initiatives like BharatNet and PM-WANI are enabling broadband infrastructure expansion. Vi's network presence in deep-rural geographies, built through its Vodafone and Idea legacy networks, gives it a differentiated footprint in states like Uttar Pradesh, Madhya Pradesh, Rajasthan, and Maharashtra.

- Rural tele-density still below 60% — significant headroom for subscriber addition
- Feature phone-to-smartphone upgrade cycle continues in rural India
- Prepaid dominates rural mix; opportunity to upsell higher-value data packs

2.2.6 Regulatory Environment

India's Department of Telecommunications (DoT) and TRAI (Telecom Regulatory Authority of India) continue to shape competitive dynamics. Key regulatory developments include: spectrum auction outcomes, the new Telecom Act 2023 (replacing the 138-year-old Telegraph Act), interconnection regulations, and data localization requirements. Favorable policy — including the government's equity stake in Vi and AGR relief measures — has been critical to Vi's financial restructuring.

3. Brand Guidelines & Identity

3.1 Brand Architecture

Vodafone Idea Limited trades commercially as 'Vi' — a unified brand launched in September 2020, merging the legacy Vodafone India and Idea Cellular identities. The Vi brand represents togetherness, optimism, and digital empowerment. It retains equity from both parent brands while projecting a fresh, youthful, and inclusive identity.

Brand Element	Detail
Full Legal Name	Vodafone Idea Limited
Commercial Brand Name	Vi
Brand Launch	September 7, 2020
Brand Tagline	Together We Can Do Big Things
Brand Personality	Bold, Optimistic, Human, Connected
Primary Target Audience	Millennials, Gen-Z, Digital-first consumers, SMEs
Brand Promise	Simple, Reliable, Personal — Digital Services for All Indians

3.2 Visual Identity System

3.2.1 Logo & Symbol

The Vi logo is a wordmark combining a crimson-red 'V' and a bright yellow-orange 'i' — symbolizing Vodafone's signature red and Idea's legacy orange. The two letters together form a speech bubble shape, representing conversation, community, and connectivity. The logo must always appear on a white or light background unless the full inverted version is used on a dark/red background.

- Minimum logo size: 25mm width in print; 80px in digital
- Clear space around logo: equal to the height of the 'i' dot on all sides
- Never stretch, rotate, recolor, or add effects to the logo
- Approved color versions: Full color (on white), White (on red/dark), Monochrome

3.2.2 Color Palette

Vodafone Vi uses a carefully defined color system that ensures brand consistency across all touchpoints — digital, print, out-of-home, and retail.

Color Name	Role	HEX Code	RGB
Vi Red	Primary — CTA, Headlines, Logo V	#E60000	230, 0, 0

Color Name	Role	HEX Code	RGB
Vi Yellow-Orange	Primary — Logo i, Accents	#F28C00	242, 140, 0
Midnight Black	Body Text, Dark Backgrounds	#1A1A1A	26, 26, 26
Pure White	Backgrounds, Reversed Text	#FFFFFF	255, 255, 255
Light Grey	Dividers, Subtle Backgrounds	#F5F5F5	245, 245, 245
Mid Grey	Supporting Body, Captions	#888888	136, 136, 136

3.2.3 Typography

Vi's typographic system is built on clarity, readability, and a modern feel that aligns with its digital-first brand persona.

Usage	Typeface	Weight	Application
Primary Headlines	Vi Headline (Custom)	Bold / Black	Campaign heroes, OOH
Sub-headings	Inter / Gill Sans MT	Semi-Bold	Section titles, cards
Body Copy	Inter / Arial	Regular	Digital UI, documents
CTA Buttons	Inter	Bold	Apps, website
Legal / Disclaimer	Arial Narrow	Regular	Fine print, T&Cs
Vernacular	Noto Sans (Devnagari / regional)	Regular	Indic language content

3.2.4 Imagery & Photography Guidelines

All visual assets must reflect the diversity, energy, and optimism of India. Photography should feature real, relatable people — not aspirational stereotypes. Images should convey togetherness, digital empowerment, and everyday moments of connection.

- Subjects should represent India's demographic diversity — age, region, ethnicity
- Avoid staged, stock-photo aesthetics; prefer candid, lifestyle imagery
- Lighting: Warm, natural tones; avoid cold, clinical lighting
- Backgrounds: Clean but contextual — urban streets, homes, workplaces, farms
- Digital/UI contexts: Devices should feature Vi app or services where visible

3.3 Brand Voice & Tone

Vi speaks to customers as a confident, friendly, and empowering partner — never corporate, never arrogant. The brand voice adapts to context while maintaining consistency in personality.

Context	Tone	Example
Advertising / Campaign	Bold, exciting, celebratory	"Big plans? Vi's got bigger data!"
Customer Support	Warm, helpful, empathetic	"We're here. Let's fix it together."
Product Communication	Clear, direct, benefit-led	"Unlimited 5G. Zero throttling."
Social Media	Conversational, witty, human	"Cricket + Vi 5G = Zero buffering bliss"
Corporate / B2B	Professional, credible, visionary	"Powering India's digital enterprises"
Crisis / PR	Transparent, responsible, calm	"We acknowledge the issue. Here's what we're doing."

3.4 Brand Touchpoints

3.4.1 Digital Channels

- Vi App — primary self-care, recharge, and content discovery platform
- Website (myvi.in) — plan comparisons, enterprise solutions, investor relations
- Social Media — Instagram, Twitter/X, Facebook, YouTube, LinkedIn
- Performance Marketing — Google, Meta, programmatic display
- SMS / Push Notifications — retention and recharge communications

3.4.2 Physical Channels

- Vi Stores — company-owned retail experience centers (~450+ locations)
- Franchise Stores and Multi-brand outlets (~1.5 Lakh+ touchpoints)
- Outdoor / OOH — billboards, bus shelters, transit media
- In-store Point of Sale (POS) materials — consistent brand execution guidelines apply

4. Market Offerings

4.1 Consumer Segment

Vi's consumer portfolio is structured across prepaid, postpaid, and broadband categories, designed to serve the full spectrum of Indian consumers — from rural feature phone users to urban power users.

4.1.1 Prepaid Plans

Plan Category	Price Range (INR)	Validity	Key Benefits
Basic Voice + SMS	19 – 99	1–28 days	Local/STD calls, SMS
Data Add-on Packs	29 – 299	7–28 days	1 GB – 50 GB data
All-in-One Plans	239 – 719	28–84 days	Unlimited calls + 1.5–2 GB/day + OTT
Long Validity Plans	1499 – 2999	365 days	Annual + data + OTT bundles
International Roaming	575 – 3999	1–28 days	Data + calling in 100+ countries

4.1.2 Postpaid Plans

Vi's postpaid portfolio, branded Vi Hero Unlimited and Vi MAX, targets premium urban users and families. Plans include unlimited calling, high-speed data, OTT subscriptions, international roaming, and device protection benefits.

4.1.3 Vi GIGAnet Fixed Wireless Access (FWA)

Vi GIGAnet provides home broadband through 4G/5G FWA technology, targeting households without fiber access. Plans start from INR 599/month with data from 100 GB to unlimited.

4.2 Enterprise Segment

Vi Business serves SMEs, large enterprises, and government institutions with a range of B2B solutions including IoT, cloud telephony, managed SD-WAN, and private 5G network solutions.

- Vi Business IoT — connected devices, fleet management, smart metering
- Vi Cloud — hosted communications, UCaaS, CPaaS APIs
- Vi Secure — enterprise cybersecurity and managed security services
- Vi Network Services — MPLS, SD-WAN, last-mile connectivity for enterprises

5. Competitive Landscape

5.1 Market Share Analysis

The Indian telecom market is effectively a three-player private market, with Jio holding the dominant position, Airtel as the premium challenger, and Vi occupying third place. BSNL, the public sector operator, serves primarily rural and government segments.

Operator	Subscriber Share	Revenue Market Share	Positioning
Reliance Jio	~39%	~40%	Mass-market leader, digital ecosystem
Bharti Airtel	~32%	~37%	Premium, enterprise-first challenger
Vodafone Idea (Vi)	~20%	~17%	Value, loyalty, rural depth
BSNL	~9%	~6%	Public sector, rural & government

5.2 Competitor Profiles

5.2.1 Reliance Jio

Reliance Jio, owned by Reliance Industries, entered the market in September 2016 and disrupted the entire industry with free voice and ultra-cheap data. Today it is India's largest telecom operator with approximately 460 million subscribers. Jio's competitive advantage lies in its end-to-end digital ecosystem — JioPhone, JioCinema, JioFinance, JioMart, JioBrain (AI) — and its in-house network infrastructure (fiber + spectrum assets). Jio is aggressively rolling out 5G on its standalone architecture, targeting universal 5G coverage.

Dimension	Jio Assessment
Strengths	Largest subscriber base, deep rural penetration, vertically integrated ecosystem, 5G standalone leader
Weaknesses	Lower ARPU vs. Airtel, brand perceived as 'budget', enterprise play still maturing
Strategy	Ecosystem lock-in via JioTV, JioFiber, JioAirFiber; AI-driven network; affordable 5G phones
Threat Level to Vi	HIGH — competes directly on price, data bundles, and rural coverage

5.2.2 Bharti Airtel

Airtel is Vi's most formidable competitor in the premium and enterprise segments. With approximately 390 million subscribers and a strong postpaid base, Airtel has successfully positioned itself as India's most preferred premium telecom brand. Its Airtel Black convergence platform — combining mobile, broadband, DTH, and OTT — is a key differentiator. Airtel has deep enterprise relationships through Airtel Business and is scaling its data center and cloud business.

Dimension	Airtel Assessment
Strengths	Premium brand perception, highest ARPU (~INR 208), Airtel Black convergence, strong enterprise vertical
Weaknesses	Slower 5G rollout speed vs. Jio, higher price points may limit mass market reach
Strategy	Premiumization, enterprise digital services, Africa ARPU growth, data center expansion
Threat Level to Vi	HIGH — directly competes for Vi's premium postpaid and urban subscriber base

5.2.3 BSNL

BSNL, the government-owned operator, has undergone a significant revival following a major INR 1.64 lakh crore revival package announced by the government in 2022. BSNL is deploying indigenous 4G technology (developed by C-DOT and TCS) across rural India. While not a direct premium competitor to Vi, BSNL's rural network expansion and potential 5G rollout pose a long-term competitive risk in Vi's rural strongholds.

5.3 Competitive Positioning — Vi vs. Competition

Dimension	Vi	Jio	Airtel
Price	Competitive / Value	Lowest	Premium
Network Quality	Improving (4G)	Strong (4G + 5G SA)	Best-in-class (4G + 5G)
5G Status	Planned (fundraise-dependent)	Nationwide SA 5G	Scaling NSA/SA 5G
OTT Bundles	Strong (Netflix, Amazon, Sony)	JioCinema focused	Airtel Xstream
Enterprise	Mid-tier	Growing	Market leader
Rural Reach	Strong (legacy Idea network)	Very strong	Moderate
ARPU	INR 145	INR 182	INR 208
Brand Equity	Moderate — rebuilding as Vi	High (mass)	High (premium)

5.4 Vi's Competitive Strategy

Given Vi's third-place market position and ongoing financial restructuring, the competitive strategy for FY 2024–25 prioritizes network investment, subscriber retention, ARPU uplift, and enterprise segment growth — rather than aggressive subscriber acquisition that would strain margins.

Key Strategic Pillars

- Network First: Complete 4G network modernization across 16 priority circles; prepare for 5G launch
- Value Stickiness: Deploy superior OTT bundle propositions to retain mid-market prepaid customers
- ARPU Expansion: Migrate 2G subscribers to 4G; push prepaid-to-postpaid upgrades in top cities
- Enterprise Growth: Deepen Vi Business penetration in SME corridor with IoT and cloud telephony
- Brand Rebuild: Consistent, emotion-led 'Vi' brand campaigns to restore consumer confidence
- Rural Defense: Protect Tier-2/3 strongholds; prevent churn to Jio through targeted retention offers

6. Marketing Strategy FY 2024–25

6.1 Campaign Themes

Quarter	Campaign Theme	Focus Segment	Key Message
Q1 (Apr–Jun)	"Vi Powers Your World"	Urban Prepaid / Youth	Speed + OTT for the digital generation
Q2 (Jul–Sep)	"Together We Score Big"	Cricket + Mass Market	Vi 5G ready + cricket-linked offers
Q3 (Oct–Dec)	"Festive Connections"	All Segments	Festive plan launches + gifting prepaid
Q4 (Jan–Mar)	"New Year, Bigger Plans"	Postpaid + Enterprise	Plan upgrades + Vi Business push

6.2 Media Investment Mix

Vi's marketing investment follows a digital-first approach while maintaining presence in high-impact traditional channels for mass reach and brand building.

Channel	Budget Allocation	Primary Objective
Digital (Search, Social, Display)	40%	Performance, lead gen, app downloads
TV (GEC, News, Sports)	25%	Mass brand awareness
Out-of-Home (OOH)	15%	Retail proximity, network claims
IPL / Sports Sponsorship	10%	Brand salience, youth connect
Influencer & Content Marketing	5%	Organic reach, Gen-Z engagement
Print & Radio	5%	Regional markets, tier-2/3 cities

6.3 Key Performance Indicators (KPIs)

- Subscriber Net Adds: Target net positive adds in Q3 and Q4
- ARPU Growth: +10–12% YoY across prepaid and postpaid segments
- Vi App MAU (Monthly Active Users): Grow to 120 million+ by March 2025
- Brand Health Score (NPS): Improve NPS from 32 to 40+ by year end
- Postpaid Subscriber Base: Add 1.5 million net postpaid subscribers
- Enterprise Revenue: Achieve INR 3,000 Cr+ in Vi Business annual revenue

7. Document Governance & Disclaimer

This document has been prepared for internal strategic and planning purposes by the Strategy & Brand Marketing Division of Vodafone Idea Limited. All data, projections, competitive intelligence, and financial figures referenced herein are based on publicly available industry sources, internal estimates, and analyst reports as of Q2 FY 2024–25.

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For queries, contact: brandmarketing@vodafoneidea.com