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Scotch Whisky in Thailand.

Strategic implications of international
alliances and product adaptation.
A secondary data research case study.

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ABSTRACT

According to an article in 2008 issue of The Globe titled “*Newly Introduced Alcohol Marketing Strategies: Thai Experience*” provided by the Global Alcohol Policy Alliance, Thailand is classified as an "emerging market" in regards to the growth and development of the alcohol industry. The industry growth and expansion is caused by the international entrepreneurs that have invaded and populated the Thai scene. International labels are now becoming more widespread; however, the domestic producers and operators are still powerful in the industry with the low price point being a contributor to its domestic labels steady market and industry success. The appeal of international labels and brands is mostly due to the "created image of life success and friendship" (*Newly Introduced Alcohol Marketing Strategies: Thai Experience*). Consumers of international labels are fascinated by the elegance of associating with such products. It seems as if only the well-off and well-rounded of business people consume international alcoholic beverages. This differentiation is important to consider especially when delivering the product to a new market. Unique promotions and marketing strategies must be considered as the international brands move into these foreign markets. Possible alternatives for international alliances are explored as well in this paper.

KEYWORDS:

International Business, Strategic Analysis, Thai Beverage Market, Marketing, Mergers and Acquisitions.

INTRODUCTION AND SITUATIONAL ANALYSIS

History

Johnnie Walker is originated in Kilmarnock, Ayrshire, Scotland. It is the most widely distributed brand of blended Scotch whisky in the world. It is sold in almost every country with sales of over 130 million bottles annually. It was originally known as Walker's Kilmarnock Whisky, and the name Johnnie Walker took over after the legacy left by John 'Johnnie' Walker when he started selling whisky in his grocer's shop in Ayrshire. After his death in 1857, his son Alexander Walker and grandson Alexander Walker II were mainly responsible for establishing the Scotch as a popular brand.

Diageo PLC

Diageo manages 17 of the world's top 100 premium spirits brands. Recently it has dropped non-alcohol products, selling Pillsbury, a large US firm producing baked foods and snacks, to General Mills in 2001, and selling Burger King, the fast food giant, in 2002, which has allowed the company to escape the current outcry against fast food. Diageo has bought much of the spirits division of Seagram, previously a major spirits company, and other alcohol brands, entrenching its position as a leader in spirits. This reflects a shift to consolidation evident in the spirits sector in general. (*Corporate Watch UK, 2005*).

Diageo's key brands include:

Whisky: Bell's (UK market leader), Johnnie Walker (global market leader in Scotch whiskey), Johnnie Walker Pure Malt, J&B (European market leader in Scotch whiskey), J&B Rare Black and White, Haig, Spey Royal, White Horse, VAT 69, Buchanan's, Dimple, Old Parr, Windsor

Premier, Seagram's 7 Crown, Seagram's VO, Crown Royal Canadian Whiskey.

Single Malt Scotch Whiskys: Cragganmore, Glenkinchie, Oban, Distillery Malts, Hidden Malts, Cardhu

Vodka: Smirnoff (40% of global market share), Ciroc, Tanqueray Sterling Vodka.

Gin: Gordon's (around 50% of UK market share), Tanqueray (US market leader in imported gin), Gilbey's Gin.

Rum: Captain Morgan (UK market leader in dark rum), Cacique, Brandenburg, Pampero, Myer's Rum.

Brandy: Bertrams VO Brandy.

Liquers: Bailey's (UK market leader in liqueur), Romana Sambuca, Safari.

Schnapps: Archers, Rumpel Minze, Goldschlager, Black Haus.

Tequila: Jose Cuervo (global market leader in Tequila), Don Julio.

Pimms

Ready-to-Drinks (alcopops): Smirnoff Ice (UK alcopop market leader, sharing 50% of market together with Bacardi Breezer), Smirnoff Black Ice, Archer's Aqua, Bailey's Glide, Ruski, UDL

Beer: Guinness (global stout market leader), Harp, Kilkenny, Tusker, Smithwicks, Red Stripe

Wine: Sterling Vineyards, Piat d'Or, Periquita Wines, Justerini & Brooks Wines, Casillero Wines, Blossom Hill Wines, José de Sousa Wines, Baron Philippe Wines, Barton & Guestier Wines, Beaulieu vineyards

Champagne: Dom Perignon

Aperitif: Picon

These 5 different blends and their main patterns are as follows:

- Red Label: Full of character
- Black Label: Hidden depths.
- Green Label: A blended malt.
- Gold Label: Pure indulgence (more expensive)
- Blue Label: Rare and exclusive (most expensive)

Existence and Impact

Johnnie Walker is the number 1 spirits brand according to *Corporate Watch UK (2005)*. The brand has been recognized as a global brand and continues to build brand equity globally, and recently in Thailand. The Gold Reserve and Blue Label have been popular among all markets. As income levels continue to rise, many new target market groups are beginning to merge together, looking

for more attractive whiskey brands and labels. The middle class has had an increasing desire for spirits and premium alcohol brands, and especially with women because of their greater financial and social independence. Asian women are increasingly enjoying social atmospheres with alcohol involved, making them another rising target market. Johnnie Walker specifically has a wide range of established premium brands that the company offers to provide new experiences and value to their consumers.

Johnnie Walker Marketing and Advertising in Thailand

The Advertising Strategy

Johnnie Walker's advertising strategy is completely revolutionary in the scotch drinking industry. While scotch beverage traditional campaigns rely heavily on tartan, hunting, and old Scotland motifs, Johnnie Walker has created an advertising campaign "*Keep Walking*" that is forward thinking and innovative rather than backward looking on history and prestige. The Johnnie Walker "Keep Walking" slogan, in conjunction with the walking man silhouette, and imaginative commercials has positioned Johnnie Walker in the consumer's mind as a drink for the brave, persistent, innovative people of the world. Original commercials run on western advertising outlets feature famous men telling the story of overcoming adversity to achieve success while current commercial show extraordinary individuals struggling and choosing to persevere. Nigel Bogle, CEO of the agency who created the campaign states, "The 'Keep Walking' campaign will not only portray progress but inspires." This message especially resonates with consumers because "Keep Walking' is very personal - it's about achievement, not conspicuous success." The message signals that any consumer of Johnnie Walker can triumph in the face of adversity in their individual lives.

Thailand Specific Advertising Strategy

In Thailand, the "Keep Walking" campaign has been tailored to suit target demographic and cultural values of the Thai market. The Thai commercials include much more of a narrative than campaigns in other countries. One particularly successful and award winning commercial spot focuses on achieving the impossible. The commercial shows the capital city of Bangkok, which is located in a hot tropical environment, covered in a layer of fresh snow. Throughout the commercial, viewers discover the hero of the ad is a special effects designer. In the commercial spot, no visual image or comment of Johnnie Walker scotch is ever mentioned. Instead the commercial ends with the tagline "Keep Walking."

To connect with the traditional Thai cultural values of group over individual progress, other Johnnie Walker spots show the story of "male progress "complemented by work showing progress at a deeper level, with men being shown developing spiritually by giving something back to the community". This serves the dual purpose of positioning Johnnie Walker as a drink for high achieving for brave individuals who simultaneously further the progress of the individual's community.

Older Demographic

Johnnie Walker has a hundred year history in the South East Asian. As such, the company has a strong foot in the older scotch drinking market in Thailand. In fact, Johnnie Walker Black Label is such a status symbol that it is customary for Thai business men to place a bottle on the table during important business dinners. Because of the brand's high profile with successful Thai business men, aspiring young professionals prefer to drink and giveaway Johnnie Walker as gifts rather than any other drink, especially light spirits, such as gin, vodka, and tequila.

Additionally Johnnie Walker sponsors the very important Johnnie Walker Classic, which is a

European golf tour played in the Asian Pacific. The ability to afford golf is a major sign of wealth and success for Asian businessmen. This strategic alliance with a European golf tournament reinforces with the older demographic the prestige associated with drinking Johnnie Walker scotch.

Newer Demographic

Though Johnnie Walker has the older Thai scotch consumer demographic on lockdown, the company is taking deliberate measures to capture the younger and non-scotch drinking demographic. In addition to sponsoring the Johnnie Walker classic golf tournament, the company has also begun to sponsor many music events that appeal to the younger consumer. The company also sponsors parties at the hottest and most hip clubs in the country. At these events young Thai women talk to the club-goers about the drink and give away whiskey with a variety of popular mixers as well as give samples of the scotch in non-traditional forms, such as ice-cream.

Johnnie Walker has also captured the youth segment by offering a range of premium scotches at various price points. By offering a scotch at a price affordable to younger drinkers, but still producing scotch at a much higher price under the same brand name, Johnnie Walker has created an environment where the consumers can aspire to trade up to the higher quality scotch. Young scotch consumers can be assured the less expensive scotch they are drinking is of a good quality while at the same time aspire to trade up in the brand as they become more successful in work and increase their buying power. Johnnie Walker scotch represents itself to the Thai market as a drink for brave and innovative individuals who through personal success and achievement simultaneously better their community. The innovative forward looking campaigns along with its popularity with prosperous individuals has allowed the company to retain the older Thai demographic and continue to grow and capture the young Thai alcohol consuming market.

ENVIRONMENTAL ISSUES, UNDERLYING LAWS, REGULATIONS AND OTHER INFLUENCES ON ALCOHOL CONSUMPTION.

While the beer, wine and spirits industry has witnessed great growth in Thailand, there are legislative bounds that control the production, marketing, and sale of alcohol. This means of control, concentrated at the retail level, is meant to support the health of local communities where heavy individual alcohol consumption is most devastating.

Control through legislation can be facilitated through a variety of means that have different strengths and underlying parameters. The means of control include "total control of production and/or sales (state monopoly), partial control (licensing system) or absolutely no control (total liberalization)." The state monopoly system has total virtual control over the operations of private outlets by limiting the number of hours of sale, in Thailand selling periods are from 11am to 2 pm and between 5pm and 12pm, as well capping the number of outlets. The retail of alcohol can also be limited through the state monopoly in actual "physical availability" while decreasing the opportunity and otherwise drive of private outlets to gain profits. Also, the monopoly ensures high retail prices within outlets thus eliminating the opportunity to use promotional discount pricing to pull consumers into the store.

Marketing, Advertising and Promotion of Alcohol

Society becomes highly influenced to consume alcohol when public advertising exposes and reveals its appeal and acceptability. However, the values associated with alcohol-consumption are socially and culturally confounded and in turn influence the success of these advertisements no matter how visually or emotionally attractive the marketing is.

In Thailand, alcohol advertising is permitted, but health warnings and other precautions are legally required on advertisements. This practice was implemented to effectively control alcohol consumption and protect the public from alcohol-related harm. In Thailand, there are many media outlets that the public is exposed to and thus has more influence on alcohol-consumption reaching a greater market of consumers. Furthermore, the aggressive nature of alcohol-related advertising, whether it be on television, in publications or at sponsored events, can be socially detrimental and thus should be controlled. Full enforcement of restrictions, which are partially enforced for advertising but not for sponsorship in Thailand, is the key for successful implementation.

Aggressive marketing strategies including direct advertising and utilizing a variety of outlets has intensified the alcohol industry. From 1989 to 2003, the advertising budget on average has risen 7.41 times indicating that the industry has become more competitive. The mechanisms in which marketing managers have employed have witnessed a progressive change since the traditional ways of using merely brand and producer images. Now, marketing efforts have become more centralized around ideas of "quality" and "prestige". The reasons underlying the change include changes in demographics and lifestyle with more people becoming interested in luxury products that represent wealth and power.

While an advertising ban in 2003 was supposed to protect the public from the harms of aggressive marketing, which otherwise increases alcohol consumption, industry leaders have discovered different channels and mechanisms to expose the market to the products. Impressively, budgets for mobile advertising increased by 583% in 2003 and 148% in 2004. Logos were everywhere and were saturating every outlet possible including website promotions and on-vehicle advertisements. Clearly, there are many holes in the policies of the ban that marketing professionals are able to exploit, leading to the aggressive marketing of alcoholic beverages.

MARKET OUTLOOK

According to the *World Health Organization Global Alcohol Database (2005)*, there has been a dramatic increase in adult per capita consumption in Thailand from 1961 to 2001. In 1961, adult per capita consumption was 0.26 liters while in 2001 it increased to 8.47 liters of pure alcohol. Amazingly, the unrecorded level of alcohol consumption in 2003 was approximated to be 2 liters per capita. Beer consumption in Thailand witnessed an eightfold growth increase from 1982 to 2001. With that said, Thailand had the "world's highest income elasticity of beer demand" from 1996 to 2001. While beer and alcohol have been consumed heavily in the country, wine consumption is rather low in comparison. *World Health Organization Global Alcohol Database (2005)*,

The increase in consumption over the years is due to changes in several environmental factors as well as country status. For example, an economic upsurge, a weak control system, a more modernized way of life, and an increase in aggressive marketing have all contributed to the increase in consumption. Not surprisingly, as people became more profitable, there was an increase in per

capita consumption and more indulgent behavior.

The market was not heavily saturated some time ago as only a few companies dominated in sales and revenue. According to *Thamarangski (2008)* “the business of a single company accounted for more than 90% of the domestic spirits market in 1999 and 64% of the beer market in 2000.” Between the years 1998 and 2000, imported alcohol accounted for merely 3.9% of all spirits and less than a tenth of the beer market. In 2004, rice or molasses locally-produced spirits had a powerful three-quarters of the entire distilled beverage production. The industry and market has been revolutionized, and this is how the international labels and brands have gained profit shares. (*Thamarangski 2008*)

The industry has been modernized, the market has become more sensitive and exposed to international competition. Since the enactment of the ASEAN Free Trade Agreement (AFTA) in 2003, the trade system has become updated and more flexible. The competitive capacity of importers has increased due to AFTA. The agreement has decreased the price of imported alcohol including economy and premium grades giving buyers the opportunity to enjoy foreign luxury brands. This allows foreign entrepreneurs the ability to invest in other markets, and this is exactly what has occurred in Thailand. An opportunity was seen, investors quickly reacted, which bolstered the Thai economy, but the increase in the presence of alcohol has become a public health issue. Alcohol policies in Thailand have worked to control and to prevent alcohol-related issues and these efforts continue today.

SOME KEY ELEMENTS OF MARKETING MIX

Price

The relative price for spirits in Thailand has been around 22.21 USD a bottle, making it 10.8% and 43.3% lower than the regional and global average prices. The low price of alcoholic drinks in Thailand has led to an increase in affordability for Thai consumers, and reflects the limitation of alcohol taxation measures to control consumption. Thai drinkers enjoy cheaper imported alcohol and also locally produced branded beverages, and as AFTA reduced the retail price of imported beverages, many of these branded drinks are preferred by young consumers. There is also a “Tied Selling” strategy within the alcohol market in Thailand. This is the practice in which alcohol producers and distributors force the retail sellers to buy other merchandise beside the popular products.

Place

Alcohol is very easy to get a hold of in Thailand. There has been a recent increase of the number of alcohol stores, especially during the economic progress period. In 2004, there was an average of one alcohol stores for every 110 people and it was recorded that the average Thai drinker took only 7.5 minutes to purchase alcohol, making the alcohol purchasing quite accessible and efficient. In recent years, street alcohol vendors and areas around universities have increased and these drinking areas have become popular among Thai youth. These new outlets make it more difficult to regulate the laws of time, place and age of alcohol purchases.

COMMENTS FROM A GROUP OF BUSINESS ANALYSTS

Taking into consideration the former information given, an independent group of international consultants is asked by JW to recommend strategies for growth in Thailand. This is the proposal of this group.

From: International Consultants

To: General Management JW Thailand.

Proposal: Strateg Alliance (Johnnie Walker and Thai Beverage)

Thai Beverage PLC is the largest alcoholic beverage company in Thailand, and one of the strongest in all of South East Asia, earning capital in excess of \$4 Billion USD. They have distilleries in Thailand, Scotland, Poland, Ireland, China, and France.

Currently they produce the most popular beer brand in Thailand, “Chang”, as well as two prominent Thai-Style liquors: “Mehkong and SangSom”. Sang Som is Thailand’s most popular liquor; until 2006 it had owned 50% of the brown liquor market for roughly 3 decades.

As Mehkong and Sang Som fall under the rum category, Thai Beverage’s control over the whiskey market is much less dominant with their brands Crown 99, Blend 285, and Drummer. While Thai taste has been traditionally fond of its malt, cane and molasses blends (generally putting it in the rum category), many imported Scotch Whiskey brands are exceptionally prominent in the luxury segment. Thai Beverage could aid Johnnie Walker in creating a Thai-style alcoholic drink.

In the past Thai Beverage Plc utilized the beer company, Carlsberg, to aid them in developing their Chang Brand. While their joint venture ultimately needed to be dissolved, Chang beer became the most popular beer in Thailand and is vastly gaining global recognition. This is due largely in part to Carlsberg’s branding tips. While the joint venture failed with Carlsberg backing out of the deal (and subsequently being ordered to pay Thai Beverage Plc 250 million dollars) there are number of reasons why it would be in Johnnie Walker’s best interest to pursue a joint venture.

It is recommended by this team that Johnnie Walker should enter into an strategic alliance with Thai Beverage to create an environment where both companies could input their respective competencies and have the potential for symbiotic success. As Thai Beverage could aid in the vision and strategy of a Scotch Whiskey (not in the Ultra Premium Category), and execute a distinct and differentiated product that could cultivate a niche in the Thai Liquor Market. Thai Bev would be the key component in terms of handling the cultural differences, and navigating a new/rebranded product into Thailand’s market.

Since Thai Beverage Plc already has distilleries in Thailand, Johnnie Walker could explore contracting the facilities to produce a domestic brown spirit with the cache associated with imported liquor. While Johnnie Walker does not wish to change or compromise their own scotch formula for Thai taste, Thai Bev could tinker with spices and flavors to get a good balance between the foreign Scotch taste, as well as the traditional Thai preferences.

Being a local conglomerate, Thai Beverages Plc is proficient at interpreting cultural practices and tastes, as well as efficiently going through bureaucratic red tape. With their already established sourcing and supplier network, they would handle the distribution and local marketing of a product much more efficiently than an outsider. Thus giving Thai Beverages Plc a distinct competitive advantage compared to foreign companies looking to repeat any success previously acquired in their host nation. In addition, Johnnie Walker gives to the Thai Beverages Plc products a level of sophistication and uniqueness that is not common in the present Thai Liquor market. As a result, the joint venture could create a “Blue Ocean” for their unique line/brand of brown liquor in the Thai Market.

Following are present factors in choosing a dark liquor in Thailand:

1. Type,
2. Price
3. Marketing
4. Terminology
5. Sophistication
6. Packaging
7. Range of products
8. Adherence to Thai traditional taste.

Price: The liquor should be somewhere in the middle of the market. Higher than typical Thai Liquor for stronger brand image and differentiation; while also not priced as high as imports, so as not to compete directly with Scottish brands, as well as attract a wider range of consumer.

Marketing: One marketing strategy should be to promote the drink at high traffic events or parties at bars in order to capture the market of trendy young drinkers, especially those who cannot afford Johnnie Walker scotch yet. Another marketing strategy is to feature the drink mixing well with other beverages. One possible idea is to sponsor a contest to create a new drink recipe. It is also imperative to think of its shelf presence in relation both to other brands/products. It should be sold next to traditional Thai Liquors so as not to compete directly with import names, ideally in a space near the end so it doesn't have brands on both sides, confusing its brand image. Prime shelf space should be a primary concern.

Terminology: The terminology should not be intimidating or a point of serious consideration. It should emphasize that the product has the complexity of imported alcoholic beverages but not go into too much detail that would serve as a distraction and detract from the vision/mission of the beverage. Too much detail of foreign techniques and tastes will also confuse the drinker, and make him/her associate the liquor with import brands. The focus should be on the drinkability and singularity, not the specifics.

Sophistication: It would be impossible to achieve the same level of European sophistication as the imports, but a certain level is needed to justify the price. The goal should be to shoot for a mid-level sophistication, higher than traditional rums, but not as luxurious as the high cost imports. In addition, it should be drinkable by the majority of the market, so it's not wise to polarize them by marketing the product out of their buying range.

Packaging: The packaging is integral to the success of this product. The bottle should not be another clone of the traditional Thai brown liquors. This branding effort could utilize a more rigid cylindrical look, a retro decanter-style bottle would also be eye catching and different. The label should be as iconic and differentiating as possible; using a small label would be efficient because not much information on distilling, ingredients, and terminology will be applied, in addition it will also draw more attention to the distinct bottling.

Range of Products: As a newcomer in the Liquor market, there should initially be a diverse range of products. At the launch there should be one bottle of whiskey sold in two different sizes. Adding more choices will simply add more questions in the consumers mind. Introducing one new choice, as opposed to a selection, should better encourage experimentation and increase ease of referrals.

Adherence to Traditional Thai Tastes: The adherence to taste should be both a point of separation, and focus for the whiskey brand. Since the primary goal is to attract Thai drinkers, albeit looking for less ordinary flavors, the composition should not be so drastically different as to completely diverge from popular tastes. The drink should be as drinkable as possible for the

Thai market, so it is definitely vital to keep elements of traditional Thai flavor in the drink, while still employing a Scotch flavor to attract exploratory customers.

Ultimately the strategic alliance could produce a completely new product unlike the other offerings the Thai brown liquor market currently has to offer. Unlike traditional Thai Spirits this has a distinct Scotch flavor, which ups the cache and level of prestige of traditional Thai liquor. Unlike premium imports like Johnnie Walker however, the new flavor is not as complex and foreign to the Thai drinker, it is also available for a price they can afford and experiment with. Lastly, not only is the taste something new and accessible, the image is completely unlike the traditional offerings and gives the drinker the cache of imported liquors, with a more familiar taste. As previously mentioned the Thai Beverages Plc company does have a few whiskeys on the market, however they compete directly with traditional Thai liquors. This new product would be a distinctly different offering, not only in taste, but in image as well.

QUESTIONS FOR DEBATE

- What do you think about the alliance proposed by the group of international consultants? (justify your answer)
- Do you forecast any potential conflicts of interest in this strategic alliance?
- What are the most important elements to research before taking the decision? In case that you propose new research, what methods and data collection techniques would you be using?
- Propose other alternatives for growth in the Thai market.
- Do you agree or disagree to what has been done in the marketing field by JW in Thailand?
- Up to what extent this alliance can put in danger the performance of other products of the company?
- Up to what extent the creation of a new adapted product to the Thai tastes can damage the brand image of JW?

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