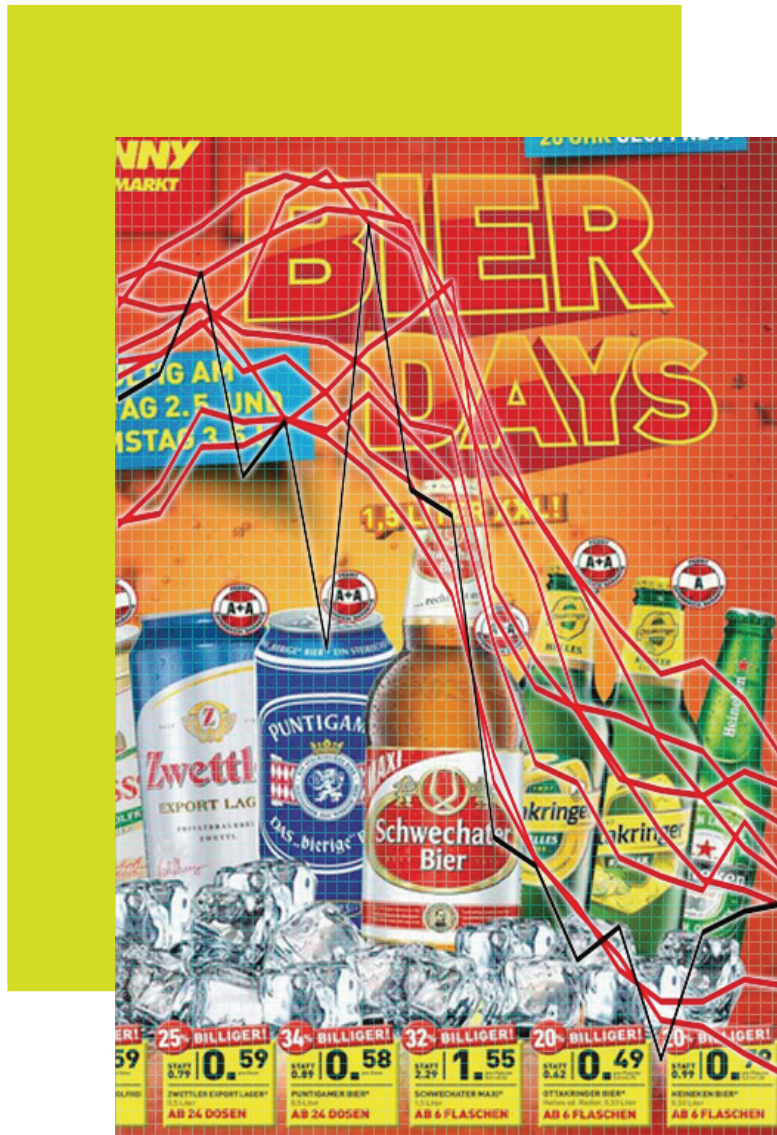


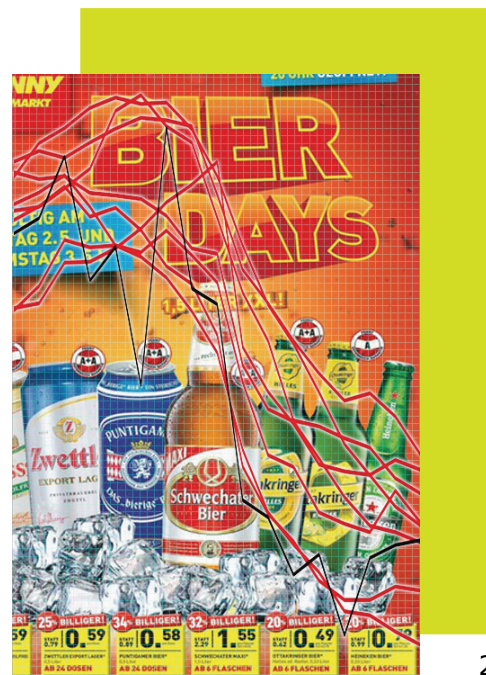
Marketing Tactics During the Economic Recession

Trends in Alcohol Marketing



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Introduction

The global economic recession occurred in the late 2000s. The recession was triggered by a housing crisis in the United States in 2007 and the coinciding loss of value in investments. The recession spread globally in roughly mid-2008 and it caused reductions in gross domestic product (GDP) which led to a rise in the unemployment rate in most economies.

As a result of the economic climate, consumers had less purchasing power and became more spend-conscious. Rising unemployment and changes in income led consumers to make changes in their lifestyle, both positive and negative.

The economic recession has been found to affect alcohol drinking patterns in various ways. Although the economic downturn adversely affected alcohol sales in developed markets such as the US and Western Europe, the recession also created a concern for alcohol-related problems. Evidence from the United States (US), United Kingdom (UK) and European Union (EU) demonstrate patterns in alcohol purchases and consumption (Bor et al., 2013, Harhay et al., 2013). A study from the US shows that during the Great Recession of 2008-2009, the total alcohol consumed increased due to a reduction in the number of light drinkers, and an increase in the number of moderate and heavy drinkers. Meanwhile, the rates of abstinence from alcohol increased among US adults. This demonstrates that even though many adults stopped drinking, there were many other adults that increased the volume of their drinking (Bor et al., 2013). A study of the impact of the economic recession on alcohol in England found significant reductions in frequency of drinking but not in alcohol consumption among the general population. However, there was a significantly greater risk of binge drinking among a high-risk group of unemployed drinkers (Harhay et al., 2013). Both examples demonstrate changes in alcohol consumption due to an economic recession.

The alcohol industry has reacted on the economic downturn by taking various actions. The current EUCAM trend report aims to provide insight in the marketing tactics of the alcohol industry in this period. Moreover, it describes patterns in alcohol consumption during the recession period.

In this report it becomes apparent that not only have the alcohol producers reacted to the recession, consumers have done so as well. For instance, consumers are less likely to go out (Shelf Life, 2012) and are less focused on purchasing brands. Instead, consumers are seeking deals and values. They are turning toward pre-drinking, and these changes in drinking patterns have in turn altered the alcohol industry's marketing tactics through product development and value dealings.

Consumer Trend: Pre-drinking

The price gap between the off-trade and on-trade has encouraged a move toward pre-drinking (Behaviour and Attitudes, 2010). Pre-drinking began as a trend but has now become a common practice among adults before they visit a pub in many EU countries.

The suggested reason is the large disparity between the cost of alcohol in urban pubs and the off-trade that is influencing consumers to pre-drink (Behaviour and Attitudes, 2010).

We even see this trend in countries with a flourishing pub culture like Ireland. In 2002, the boom days, two to three Irish adults went to the pub to drink alcohol once a month or more often (Behaviour and Attitudes, 2010) and the majority of drinking occasions (64%) used to occur in licensed premises. However, during the recession in 2010 almost half of the population rarely visited the local pub on a monthly basis (Behaviour and Attitudes, 2010). In 2010, drinking occasions that occur in licensed premises have been reduced to 46% while 54% of drinking occasions are now held at home (Behaviour and Attitudes, 2010).



As a consequence, brands like Chambord, a liqueur that is primarily an on-premise marketed brand, have been hit the hardest as more people stay at home (Ponti, 2011).

Image 1: Chambord

Marketing Tactics Used By Supermarkets

Supermarkets are a major player in the off-trade market. With the move toward the off-trade, supermarkets have started to capitalize on this growing trend through promotions, non-branded wine and lower prices.

Non-branded wines are sold as a cheaper alternative to premium brands. Supermarkets are able to offer non-branded wine at low prices, an incentive for consumers as they have become more penny conscious. Supermarkets also offer their own brand, typically cheaper than brand names. For example, Dutch supermarket chain Albert Heijn offers a large assortment of new wines and discount prices.

Supermarkets such as Aldi offer beers such as Schultenbrau premium pilsner for very low prices (6 cans of 0.33 L at €1.89) (Aldi Markt n.d., p. 12).



We hebben ons assortiment AH wijnen vernieuwd.

En alles ingedeeld op smaak.

U kocht	Probeer dan nu	Probeer ook eens	U kocht	Probeer dan nu	Probeer ook eens
 AH huiswijn wit lichtzoet	 AH lichtzoete Franse huiswijn	 AH Moscato South Africa 2013	 AH Semillon Chardonnay	 AH volle Australische huiswijn	 AH Chardonnay Argentina 2013
 AH huiswijn wit droog	 AH frisfruitige Franse huiswijn	 AH frisfruitige Chileense huiswijn	 AH Italia Garganega	 AH frisfruitige Franse huiswijn	 AH Pinot Grigio Italia 2013

Image 2: Screenshot of the online Albert Heijn Wine Assortment (Translation: "We have renewed our assortment. And ordered everything according to flavour." Right of the vertical lines it says: "You bought", left it says "Now try" and "Also try".) Note that all of the bottles are of Albert Heijn's own AH brand.

Alle zomerbieren



Image 3: Albert Heijn Discounts (Translation: All summer beers –or Summer Hits- discounted 40%.)

Discounts at supermarkets

In 2012, 'beer wars' in the Netherlands were highlighted in an online newspaper (Van der Laan, 2012). Supermarkets lowered the price of beer to entice customers to purchase beer from that particular store. The Dutch health service GGD reacted in favour of banning alcohol from supermarkets, increasing the minimum age of buying alcohol to 18, and introducing a national minimum price for beer (Telegraaf, 2012). The supermarkets association denies a relationship between alcohol price and alcohol abuse, and legal drinking age and alcohol abuse. This way of thinking leads to examples of discounts such as Dutch supermarket chain C1000 offering three crates of beer for the price of two (C1000, 2013) and demonstrates a vested interest from the supermarkets association especially in +times of economic recession.

Discounts and value deals are not limited +to supermarkets in the Netherlands only. Examples from German supermarkets also promote deals. The first ad to the right compares deals on energy drinks, water, soda and alcoholic beverages. The unit price of a beer on sale is lower than the unit price of a can of soda on sale.

Ob als Durstlöcher, Erfrischer, Vitaminspender, oder für den puren

MERKUR Es ist verdammt hart, der Beste zu sein.

Images 4 & 5: Discounts from a leaflet by German supermarket Merkur



Image 6: Markturu Discounts

Supermarkets also use product placement within the supermarket floor space to encourage sales of alcohol. For example, a recent study in the UK shows that end of aisle displays significantly increased sales of featured (and typically cheaper) products (Telegraaf, 2014). Sales of beer increased 23%, sales of wine increased 34% and sales of spirits increased 46% with the use of end of aisle displays (Alcohol Policy UK, 2014).



Alle alfa, dommelsch, jupiler, hertog-jan, palm en warsteiner bier - Jupiler

Selling Below Cost

Another apparent trend across Europe is that of alcohol sold below cost (sold at prices of less than costs of manufacture for the producer or purchase for the retailer) (Selling below cost, 2002). Alcoholic products in Ireland for example are being sold for cheaper than the price of staple products such as water (Checkout, 2010d). This means that retailers are compensating for selling alcohol below cost by increasing the price of staple products. In the Netherlands, beer drinkers recently got a bargain since crates of Heineken, Grolsch and Amstel were offered as deals in supermarkets. On average, discounts at supermarkets ranged from 28% to 40% (Telegraaf, 2014).

Image 7: Beer in Supermarkets

These patterns are not limited to beer only. Research from Nielsen shows that 33% of spirits sold in the off-trade in 2009 were on deal, a 12% increase from 2008 (Checkout, 2010e).

Marketing Tactics Used By Alcohol Producers

During the recession, sales of super-premium products fell and thus, the amount of new product development for super-premium products has also fallen over the last two years (Euromonitor International, 2009a). Evidence from the US demonstrates that American consumers were switching to cheaper forms of alcohol and value brands during the recession. Similarly, in Eastern Europe in 2008 the consumption of spirits fell as people turned toward cheaper alcohol.

Economical Sizes

A growing trend in product development is the move away from the well-known pack sizes toward more economical sizes. Generally we can see that the smaller and therefore cheaper packages have become more popular. For example, the availability of 500 ml sized packs of drinks is declining while the 330 ml sized bottles are growing in popularity (Euromonitor International, 2009b). At the same time, larger volumes of alcohol are advertised by offering value deals. For example, Karpacki, offered a value deal of a four pack can of the premium Polish lager and in 2010 it was the fastest growing can lager on the market (Checkout, 2010a). The premium Czech lager, Prazky is also sold in packages of four or six as a value (Checkout, 2010b).

Multi-Buys and Other Promotions

Although innovation is still important in the beer market, price is the dominating factor. Multi-buys and promotions are now so common practice within the beers and cider market that these purchase options are now expected. Approximately 29% of all beer sales through off-trade channels were purchased as a deal, which is 11 points higher than the previous year (Checkout, 2010c).

Evidence from Ireland supports the notion of price as a dominating factor. In 2005, 5% of Irish consumers responded that they would change stores because of a better promotion, but by 2009, 19% of Irish consumers said the same, demonstrating the sensitivity to price during the economic downturn (Checkout, 2011). This has also led discounters to offer lower prices and increase their share in the beer and cider market (Checkout, 2011).

Off-Trade Products

Companies have tried to develop products for the off-trade. Southern Comfort, a well-known brand of whisky launched a line of ready-to-serve cocktails in 2011 as a purchasing option for the off-license alcohol consumers (Ponti, 2011). Smirnoff has also introduced new flavours, pre-mixed cans, and ready to serve cocktails. Jagermeister launched a new 20cl bottle in Ireland specifically for the off-trade, as an equivalent competitor to the 70cl bottle for the on-trade to meet the growing trend of drinking in off-trade locations (Checkout, 2010e).

Online Advertising

The virtual environment also offers alcohol producers a new method to market their products. Products can be offered and displayed at once online. Headings for discounts and offers can entice consumers, especially when they are looking to save money. Examples from Sweden demonstrate these patterns:



Image 8: Jagermeister




<p>Recension: ★★★★★</p> <p>Absolut Gräpevine</p> <p>Absolut Gräpevine</p> <p>1 I Lager 196:-</p> <p>1 liter Köp ></p>	<p>Recension: ★★★★★</p> <p>Absolut Apeach</p> <p>Absolut Vodka Apeach har en stark men samtidigt fräsch peach smak</p> <p>1 I Lager 168:-</p> <p>1 liter Köp ></p>	<p>Recension: ★★★★★</p> <p>Absolut Citron</p> <p>Absolut variant på smaksatt vodka med fräsch citronsmak</p> <p>1 I Lager 168:-</p> <p>700 ml Köp ></p>	<p>Recension: ★★★★★</p> <p>Absolut Peppar</p> <p>Den första smaksatta vodkan, Absolut Peppar med inslag av jalapeno.</p> <p>1 I Lager 168:-</p> <p>1 liter Köp ></p>
<p>REDSATT PRIS</p>  <p>Recension: ★★★★★</p> <p>Absolut Vanilj</p> <p>Den distinkta och rena smaken av Absolut vodka, med en naturlig vaniljsmak.</p> <p>1 I Lager 165:-</p> <p>1 liter Köp ></p>	 <p>Recension: ★★★★★</p> <p>Absolut Vodka</p> <p>Absolut vodka är en av de bästa och renaste premium vodkaerna i världen.</p> <p>1 I Lager 168:-</p> <p>1 liter Köp ></p>	 <p>Recension: ★★★★★</p> <p>2-Pack Absolut Vodka</p> <p>2-Pack Absolut vodka är nu på erbjudande</p> <p>1 I Lager 328:-</p> <p>2 liter Köp ></p>	<p>1500 produkt</p> <p>3. Alla priser moms och skatt</p> <p>4. Boka leverans dina varor här på 3-6 arbetsdagar</p> <p>5. På Drinko enkelt att ha med de största och erbjudande kundservice öppet köp. Kundservice</p>

Image 9: Swedish Online Discounts

Wine clubs are another method to promote products, create predictability in sales and create a loyal group of consumers. Wine clubs are using the internet to target their audience and are able to offer discounts as an incentive. In Sweden, there are several wine clubs.

The screenshot shows the website for 'THE WINE COMPANY' with the tagline 'THE EASY WAY TO WINE'. The navigation bar includes 'Logga in > Mitt Konto > Företag > Din Rätt >'. A contact number 'Svenska vinkonsulter 0049 4122 50 44 66' is displayed. A shopping cart icon shows '0 Artiklar' and a 'Gå till kassan' button. A search bar contains 'sökbegrepp / artikelnummer' and a 'Sök' button. The main menu lists 'SORTIMENT', 'RÖTT VIN', 'VITT VIN', 'ROSÉVIN', 'MOUSSERANDE', 'ERBJUDANDEN', 'VINO SELECT', 'FÖRDELAR', and 'VINBLOGG'. A sidebar on the left has a menu with options: 'VINO SELECT HEM >', 'VÄLKOMSTPAKET >', 'SÅ ENKELT ÄR DET >', 'EFTERBESTÄLLA VINER >', and 'DITT NÄSTA PAKET >'. The main content area features a 'VINO SELECT' promotion: 'VINO SELECT – det enklaste sättet att lära känna goda viner! Du får regelbundet noggrant utvalda viner till ett fast prova-på-pris – och kan på så sätt enkelt öka dina vinkunskaper.' Below this is an image of a wine box and several bottles. A red banner says '12 viner till specialpris', 'Fri frakt', and 'Sommerlikerkniv gratis'. A red circle indicates 'per paket endast 1390 kr'. A 'KÖP >' button is visible. At the bottom, there are three numbered steps: 1. 'Enkelt och bekvämt - du får regelbundet dina viner direkt hem till dig', 2. 'Nyheter från kända vinodlare', and 3. 'Detaljerad information om vinerna'.

Image 10: Wine Company

Contests

In Poland, incentives such as “buy beer, and win money” (3Bee, 2009) encourage people to consume alcohol, or at least purchase alcohol, for their chance to win money. This is an innovative marketing scheme from 2009 that plays on people’s economic vulnerability during the recession.

The advertisement is for a beer contest in Poland. It features a large bottle of 'JAKO' beer in the foreground. Text in Polish reads: '1/2 LITRA PIWA ZAWIERA 25 GRAMÓW CZYSTEGO ALKOHOLU ETYLOWEGO', 'SPRZEDAŻ ALKOHOLU OSOBOM DO LAT 18 JEST PRZESTĘPSTWEM', 'GORĄCE NAGRODY NA CHŁODNE DNI', 'Wyrwij kasę oraz zestawy piwa na cały rok!', 'NAGRODY LOSUJEMY CO 3 DNI!', 'ZASADY PROMOCJI', 'KĄDY KOLEJNY SMS ZWIĘKSZA SZANSĘ NA WYGRANĄ!', and 'www.jako.com.pl'. There are images of other beer bottles like 'HOPS' and 'LIZAK'.

Image 11: Contest in Poland

In Iceland, since the recession there has been increased alcohol marketing on the internet, especially through Facebook. An example of a Facebook advertising campaign is given below. The image is accompanied with the message “It’s so nice to have fun!” The image is advertising a chance to win a box of Pilsner Urquell by clicking “like”, leaving a comment and sharing links to 2fyfir1.is or happyhour.is through Facebook.

Petta er kassinn sem þú gætir unnið!



Image 12: Online Advertising in Iceland

Lobbying Against Regulation

Taxation, minimum pricing, and raising the minimum age of drinking are just a few tactics that governments can use to regulate alcohol. In return, the alcohol industry uses lobbying to oppose regulation.

Minimum pricing is a method proposed by governments and public health industry in response to high levels of alcohol consumption and alcohol related harm. However, examples from the United Kingdom demonstrate how this is often met with resistance from others such as the alcohol industry and those who cite infringement on free trade. In the UK, those opposing minimum pricing instead often encourage increases in taxation rather than minimum pricing. However, it is not a guarantee that the alcohol industry in the UK will not lower prices in response to increased taxation. In Sweden, for example, when the government raised the taxes on alcohol, the industry responded by lowering the prices, which in essence was an attempt to maintain their profits despite the new taxes. Additionally during the recession, the Dutch government wanted to increase taxation on alcohol but was met by a strong lobby from the industry, and ultimately changed their plans.

But the lobby isn't exclusively aimed at reaching specific policy goals. Another way that the industry is using their lobby is to legitimate their position in European society. In December 2013, the Brewers of Europe, Regioplan Policy Research and EY published a report called "The contribution made by beer to the European economy". This report described the contribution of the brewery sector in stimulating job growth. The report highlighted their contribution positively, which is expected from a report produced by the industry (Brewers of Europe, 2013). By exemplifying benefits like job growth during the recession the brewers are putting a positive spotlight on their industry, in an effort to keep further legislative regulation at bay. The same was done recently by spiritsEUROPE, the European organization representing the spirits sector, when they released a 'trade brochure', called "Spirits: A European Power House for Trade (spiritsEUROPE, 2014)." Aimed at European trade politicians, the brochure describes how the spirits industry "drives sales, jobs and growth," yet only warns for a negative health impact when discussing illegally produced alcohol.

Similarly, Panimolitto: The Federation of the Brewing and Soft Drinks Industry in Finland launched a campaign to highlight the Finnish beer industry and its role as an employer (Panimolitto, 2012), a tactic by the industry to defend their "rights" by showing their contributions only in a positive light. This campaign, much like the report by Brewers of Europe, argues that trends during the recession (regulation, pre-drinking, drinking at home, etc.) are adversely impacting jobs and employment. A comparable message was communicated by the Bluewhite footprint campaign (Sinivalkoinen jalanjälki) a joint effort by the Association for Finnish Work and various commercial entities, amongst which the Hartwall brewery, whose magazine advertisement for Lapin Kultra beer says: "Ten euros a month used for Finnish products will create 10.000 new jobs in a year."



Image 13: Magazine advertisement for Lapin Kultra beer from Finland, stating: "Kymppi kuussa lisää suomalaisiin tuotteisiin luo vuodessa 10 000 uutta työpaikkaa." (Translation: "Ten euros a month used for Finnish products will create 10.000 new jobs in a year.")

Conclusion

The economic recession led to more spend-conscious consumers. Increasingly, consumers were staying home and drinking at home rather than visiting the local pub or bar. This moved the market for alcohol from on-trade locations to off-trade locations. Alcohol marketers shifted their tactics to match these changes. Tactics included supermarkets promoting discounts, value deals, as well as their own brands of wine which were sold considerably cheaper than premium brands. Producers promoted economical sizes, multi-buys and even created products such as pre-mixed cocktails especially for the off-trade market. The variety of marketing tactics used, demonstrates the adaptability of alcohol marketers to changes in the economy. Marketers will attempt to influence vulnerable consumers in times of financial constraint through incentives to save money. Moreover, any attempts to reduce binge drinking through minimum pricing or taxation have been blocked by the industry directly or through publication of reports that promote the industry positively, as an economic driver. Alcohol marketers are resilient, and do not let consumers' economic problems interfere with the industry's growth and profits.

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Trends in Alcohol Marketing

Marketing Tactics During the Economic Recession

The recent economic recession moved the market for alcohol from on-trade locations (e.g. bars) to off-trade locations (e.g. home), especially with more people pre-drinking. Alcohol marketers offered value deals, discounts, and multi-buys to compliment these changes. Marketers also created new products such as pre-mixed cocktails especially for the off-trade market. The industry also rallied against proposed regulations for minimum pricing or taxation, either directly through lobbying or indirectly through corporate social responsibility methods. This EUCAM trend report describes the marketing tactics the industry used during the economic recession. It shows that alcohol marketers are resilient and adaptable and choose to aggressively market products for profit rather than protect population health.

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