

The effect of Covid-19 on the Scotch whisky industry
and how Johnnie Walker deployed their marketing
strategy to 'bounce back'

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Introduction

Back in December 2019 a new virus known as the coronavirus (Covid-19) had arisen and quickly spread worldwide by early 2020s. The impact of Covid-19 on the world was devastating and had drastic effects for businesses and industries everywhere, particularly for the Scotch whisky industry whose route to markets involved on-trade and off-trade sales. This crisis presented numerous strategic marketing issues for businesses during this time with many of them taking huge losses, the specific issue that is to be explored is that as lockdown restrictions were slowly being lifted and the world gradually started moving again, companies within the Scotch whisky industry was set with the task to deploy innovative marketing strategies to bounce back from the catastrophic impact the pandemic had on their market. This case study will be investigating the impact it had on the Scotch whisky industry, how it affected the renowned brand of Johnnie Walker and their strategic approach in recovering from pandemic.

Impact of COVID-19 on the supply chain in Scotch whisky industry

The rise of Covid-19 presented multiple challenges for the Scotch whisky industry, particularly for the supply chain within that industry. The demand for whisky products falls heavily into the on-trade side of sales through their route to markets (RTM) in bars and pub services, plus in the off-trade RTM through selling within retail environments. These operations were forced to close due to the restrictions imposed during the pandemic, causing distilleries to halt production as there was no demand in the on-trade or off-trade because of the lockdown restrictions. As well as the poise of production for on-trade and off-trade, whisky distilleries were responsible for a large amount of exports pre-pandemic. 'Scotch Whisky exports grew by 4.4% to more than £4.9bn in 2019, with 1.3bn bottles exported to 180 markets.' (Scotch Whisky Association, 2020) However, due to the pandemic, 'in 2020, Scotch whisky exports fell 23% by value to £3.8bn.' (BBC News, 2021) seeing global exports of Scotch whisky slumped to their lowest level in a decade as exports fell by value of £1.1bn in 2020 in comparison to 2019. 'Global travel retail, i.e., airports' is one of four main routes to market for Scotch whisky to reach its global consumer base and the closure of airports will have a significant effect on 'export value and volume.' (Parliament, 2020) 'The closure of hospitality and travel restrictions hit airport retail globally, with export values falling in 70% of Scotch whisky's global markets, compared with 2019.' (BBC News, 2021)

Whisky brands that were affected due to the pandemic

There were many whisky companies that didn't perform well due to the pandemic, some of these companies are competitors to Johnnie Walker. William Grant, whose portfolio includes Glenfiddich, The Balvenie and the blended whisky Grant's made 'pre-tax profits of £375.26 in 2019' and the firm said, 'its latest results reflected a "significant reduction" from the previous year as a result of the covid-19 pandemic "causing major disruption to the business, the spirits industry and society as a whole." according to Findlay (2021). Glenturret was also negatively impacted due to the pandemic, according to Lalique Group's annual report, 'The Glenturret

segment recorded a 30% reduction in sales to EUR 1.3 million and an EBIT of EUR -2.5 million (previous year: EUR -1.8 million due to the corona pandemic.’ (Lalique Group, 2021)

How Johnnie Walker was affected during COVID-19 pandemic

Johnnie Walker’s parent company Diageo said the ‘2020 fiscal was one of “two halves” as Covid-19 presented “significant challenges”, with North America being the only region to report a growth in organic sales.’ (French, 2020) It was reported by the world’s largest spirit maker that there was a ‘8.7% reduction in net sales, which was totaled £11.8 billion, in the year ending June 2020. Operating profits likewise fell by 47.1% to £2.1 billion.’ (French, 2020) The region of North America which represents ‘39% of Diageo’s net sales,’ was the only major region in which the company operates to report ‘organic sales growth. However, Diageo said this growth was “more than offset” by declines in all other areas.’ (French, 2020) Diageo’s stated their 2020 fiscal was one of “two halves” this is because the first half of the year they maintained a consistent performance throughout, however this wasn’t the case for the second half contributing to the impact on their full year performance. ‘Johnnie Walker is the lifeblood of Diageo. From Red to Black to Blue Label and beyond, the brand accounts for 55% of the firm’s Scotch business.’ ‘Johnnie Walker was impacted in the first half of F20 with ‘sales down 3.8%’ (Bruce-Gardyne, 2020) by the end of June that had turned into ‘22% fall for the full year which helped Diageo’s net sales of Scotch whisky to shrink by 17%.’ (Bruce-Gardyne, 2020)

Johnnie Walkers comeback from COVID

After the challenges Johnnie Walker faced during the pandemic and the devastating impact it had for the performance of Diageo for that year of 2020, Diageo are set with the task to rethink their marketing strategies for Johnnie Walker as the world gradually reopens after a difficult 18 months. Johnnie Walker saw this time as an opportunity to launch its ‘Keep Walking’ campaign as a remedy to get the world moving again. ‘Johnnie Walker, the world’s number one Scotch Whisky wants to inspire people to Keep Walking towards a positive future with the latest chapter in its iconic global campaign.’ (Diageo, 2021) Julie Bramham, Johnnie Walker’s Global Brand Director said “Johnnie Walker has always been defiantly optimistic and a beacon of progress – that’s what Keep Walking is all about. Keep Walking is two little words that say so much about positivity, possibility, and resilience. After everything we’ve all been through in the past years, we can’t imagine a time in recent history when those sentiments could be more relevant.” (Diageo, 2021) The launch of the campaign comes weeks after Johnnie Walker opened the doors to its new landmark visitor attractions, ‘giving people a unique and immersive way to experience whisky and socialise together again in the brand’s homeland.’ (Moreton, 2021) The ‘Keep Walking’ campaign ‘follows \$100m of investment over the past 18 months from parent company Diageo to help the post-pandemic recovery of pubs and bars by supporting jobs and communities around the world through their ‘raise the bar’ program.’ (Bapna, 2022) In hope to get the on-trade route to market (RTM) back on track as the on-trade represented ‘26.3%’ of spirit sales for 2022. (Statista, 2022)

The Keep Walking campaign, success or fail?

From the launch of “Keep Walking”, Johnnie Walkers sales quickly returned to strong growth and today that rise continues unabated. ‘As the only brand to feature across all three categories within the top 10 campaigns ranked over the last year, Johnnie Walker found that its “anthem” resonated with audiences using global and local activity that aimed to support the hospitality sector around the world as Covid-19 lockdown restrictions began to ease.’ (Lepitak, 2022) The Keep Walking campaign caused Johnnie Walkers global sales to rise by ‘over a third and for the first time ever it surpassed 21 million cases globally’ as well as this the campaign is ‘multi-award winning – including three Kantar Creative Effectiveness awards this year, one in each category (digital, static and TV) – across countries, cultures and stages of market development.’ (Kantar, 2022) Which was judged against 13,000 other advertisements. ‘Johnnie Walker organic net sales grew 34%’ in the first year of the release of Keep Walking campaign. The ‘Keep Walking’ campaign’s success speaks for itself and has successfully communicated with their audience’s post-pandemic bringing joy and inspiration into their audiences’ lives.

Diageo Recovery

The owners of Johnnie Walker Diageo mentioned that ‘we benefited from the on-trade recovery, continued premiumization trends, with our super-premium plus brands up 31%, and from our price increases across our regions.’ (Sharesmagazine, 2022) Johnnie Walker falls into the super-premium plus category in Diageo’s product portfolio therefore, contributing to Diageo’s recovery. ‘There was a 27% jump in whisky sales, including a 31 per cent rise for premium brand Johnnie Walker.’ (Reid, 2022) Diageo’s CEO added: ‘I am particularly proud of the performance of Johnnie Walker, which delivered double-digit growth across all regions to surpass 21 million cases globally.’ (Sharesmagazine, 2022) Richard Flood, investment manager at Brewin Dolphin said “Diageo has produced a great set of results with a strong increase in sales, margin and profits over the past six months.” and added “Diageo has been able to successfully navigate the challenges of Covid with its strong presence in both the off-trade, as well as the pubs sector – or on-trade – which is expected to recover further as Covid fades, leaving Diageo well positioned for the future.” (Reid, 2022)

Conclusions

The whisky industry was significantly affected by the Covid-19 pandemic, particularly in the supply chain as lockdown restrictions were imposed, demand for products were at an all-time low causing distilleries to halt production of products. This didn’t just impact Johnnie Walker whose parent company Diageo reported a ‘8.7% reduction in net sales but many whisky brands were hit hard during this time. For example, William Grant saw a “significant reduction” from the previous year because of Covid. As lockdown restrictions began to ease and the world gradually started moving again, Johnnie Walker released their ‘Keep Walking’ campaign as a way bounce back from the pandemic and get their sales and growth back on track, the success of the campaign speaks for itself.

Case Questions

- 1) How was the Scotch whisky industry affected and what impact did that have for Johnnie Walker?
- 2) What was Johnnie Walkers strategic comeback from Covid-19 and was it effective?

Model Answers

- 1) How was the Scotch whisky industry affected and what impact did that have for Johnnie Walker?

The rise of Covid-19 presented multiple challenges for businesses globally which can be supported by Engidaw (2022) who states, 'coronavirus crisis caused destruction for many businesses in the globe.' Including the Scotch whisky industry and had devastating impacts across numerous Scotch whisky brands. The supply chain within this industry was hit particularly hard, 'the current pandemic has not only impacted the health and quality of life of people but has also disrupted the global economy, supply chains, and countries all over the world.' (Memon et al., 2021) due to the lockdown restrictions being imposed by the government. As demand for whisky products fall heavily on their route to markets (RTM) which include the on-trade RTM through supplying bars and pub services who sell their products and off-trade RTM which sell whisky products through retail environments. Due to off-trade and on-trade sales channels being shut down because of the pandemic, whisky distilleries were forced to halt production of their products as the demand for said products were at an all-time low for these RTMs, this would have a significantly negative impact for the whisky distilleries. 'Those drinking above guideline levels are estimated to account for 68% of total alcohol sales revenue in 2013/2014' 'If all consumers reduced their drinking to within guideline levels, alcohol sales revenue could decline by 38%.' (Bhattacharya et al., 2018) This can be generalised to how the on-trade was affected by Covid-19 pandemic because if no one is drinking due to lockdown restrictions then the total sales revenue for Scotch whisky will decline.

Whisky distilleries were also responsible for a large amount of exports pre-pandemic and is another RTM for this industry, according to the Scotch Whisky Association (2020) in 2019, Scotch whisky had '1.3bn bottles exported to 180 markets' which is a huge number of exports and account for a high amount of revenue flow as 'Scotch whisky exports grew by 4.4% to more than £4.9bn in 2019.' The pandemic had a negative impact on this channel of distribution as 'in 2020, Scotch whisky exports fell 23% by value to £3.8bn' as stated by BBC News (2021) causing the biggest decline in a decade, as in comparison to 2019 their export value fell by £1.1bn.

Airport retail travel is one of the main RTMs for the Scotch whisky sector and according to Colak et al (2022) the 'demand for air travel fell globally by around 90% in the period immediately following the introduction of lockdown restrictions which induced significant revenue loss for the industry.' the less demand for air travel will have a significant impact on 'exports value and volume' (Parliament, 2020) This is evident as BBC news (2021) stated that 'The closure of hospitality and travel restrictions hit airport retail globally, with export values falling in 70% of Scotch whisky's global markets, compared with 2019.' To sum up these drastic effects from the rise of the coronavirus this impact hit the industry hard putting many whisky distilleries in peril and essentially putting them into survival mode in the hope that they can bounce back as covid-19 starts to ease. 'Respondents confirmed that Covid-19 has disrupted the spirits market and that significant changes in individual consumption patterns have occurred.' (Fehlen & Lafaye, 2022) meaning that normal distribution of spirit products like Scotch whisky has been affected and the consumption patterns of these products by consumers have changed resulting in whisky brands having to rethink their strategies.

These problems occurring within the Scotch whisky industry meant that many whisky brands were affected as a result. For example, Glenturret was hit hard, Laliq Group who purchased a '50% stake in Glenturret distillery for £15.5m' (Mercer, 2019) reported in their annual report, 'The Glenturret segment recorded a 30% reduction in sales to EUR 1.3 million and an EBIT of EUR -2.5 million (previous year: EUR -1.8 million due to the corona pandemic.' (Laliq Group, 2021) As a result of covid many distilleries were producing hand sanitizers in support of health care through Covid, for example 'Diageo created 8 million hand sanitizer bottles.' (Prakash et al, 2020)

This brings us to how Johnnie Walker was impacted resulting from the effects of the pandemic. Johnnie Walker is owned by its parent company Diageo, who reported there was a '8.7% reduction in net sales' and 'operating profits likewise fell by 47.1% to £2.1 billion.' (French, 2020) Johnnie Walker is Diageo's leading brand for their Scotch sales, accounting for '55% of the firm's Scotch business.' In the first half of F20 sales were down '3.8%' and by the end of the full year at the end of June this turned into a '22% fall for the full year which helped Diageo's net sales of Scotch whisky to shrink by 17%' (Bruce-Gardyne, 2020) which caused a significant impact for Diageo as mentioned prior. Diageo stated that their 2020 fiscal was one of two halves, this is because the first half of 2020 they managed to maintain a consistent performance with sales being down only '3.8%' which cannot be said for the second half of F20 as it turned into a '22% fall' by the end of the full year.

2) What was Johnnie Walkers strategic comeback from Covid-19 and was it effective?

The Covid-19 pandemic caused issues that no one was ready for, forcing whisky companies to rethink their marketing strategies as an approach to recover from the time of uncertainty, 'these shifts in consumer behavior have changed the marketing environment,

forcing companies to change their marketing strategies' (Nguyen et al., 2021) as lockdown restrictions began to ease 'Johnnie Walker, one of Diageo's largest brands, is the world's number one Scotch whisky brand' (Hoogers et al., 2023) saw this as an opportunity to deploy their 'Keep Walking' campaign which was their strategic come back from Covid-19, it was released as a remedy to 'get the world moving again.' The idea around this campaign was to 'inspire people to 'Keep Walking' towards a positive future' (Diageo, 2021) after the difficult time people had during the pandemic. Julie Bramham, Johnnie Walkers Global Brand Director said 'Keep Walking is two little words that say so much about positivity, possibility, and resilience. After everything we've been through in the past years, we can't imagine a time in recent history when those sentiments could be more relevant.' (Diageo, 2021) So, Johnnie Walker couldn't of chose a much better time to release their new Keep Walking campaign as it's highly relevant to the time, as the world is gradually starting to move again, "Keep Walking' provides people with the message to carry on and forget about the terrible time they would've experienced throughout Covid.

The campaign also comes weeks after Johnnie Walker opened its doors for its new visitor attraction in Edinburgh which was another strategic come back conducted by Johnnie Walker, proving a pleasant and immersive experience where people can 'socialise together again in the brand's homeland.' (Moreton, 2021) Which is an excellent way for Johnnie Walker to boost sales and revenue to come back from the negative effects they had to face during the pandemic. As a result of Sahin et al's (2011) study they found that 'brand experience affects satisfaction, trust and loyalty.' So, by Johnnie Walker opening their new distillery attraction the brand experience can have a positive effect on brand loyalty which in turn increases customer retention allowing for brand growth which is exactly what they need coming out of the pandemic. The Keep Walking campaign follows the investments made by Diageo over the past 18 months for their 'raise the bar' program to 'help the post-pandemic recovery of pubs and bars by supporting jobs and communities around the world.' (Bapna, 2022) The purpose of this program for Johnnie Walker can be to get the on-trade RTM back on track as the on-trade represented '26.3%' of spirits sales for 2022 (Statista, 2022) so it would be ideal for them to get this channel up and running again as it represents many sales.

The campaign was a complete success for Johnnie Walkers recovery from Covid as sales quickly returned to strong growth and continues to rise to this day. This campaign was also distributed through social media channels and Ren et al (2016) stated in his study that 'social media marketing strategies have positive impacts on the long-term financial performance of firms.' So, due to the success of this campaign across social media platforms Johnnie Walker should experience long-term financial gains. As well as being promoted through social media The 'Keep Walking campaign appeared on billboards around the world, 'Billboard advertising has an effect on brand awareness.' (Wasserbauer, 2023) and according to (Martono & Prameswari, 2022) 'The results of the study indicate that the brand awareness variable (X) has a significant effect on increasing sales (Y)' This means that through the billboard advertising of the 'Keep Walking' campaign, brand awareness can be increased which in turn will increase sales for Johnnie Walker. The success of this campaign

speaks for itself as Johnnie Walkers global sales rose 'over a third and for the first time ever it surpassed 21 million cases globally' the campaign is also 'multi-award winning – including three Kantar Creative Effectiveness awards.' (Kantar, 2022) 'Johnnie Walker organic net sales grew 34% this year.' (Diageo, 2022) So, as this campaign proved to be highly successful, we can state that Johnnie Walkers strategic come back from Covid-19 was extremely effective.

To back up the success of Johnnie Walkers come back, looking into the recovery of Johnnie walkers parent company Diageo, their CEO mentioned that 'I am particularly proud of the performance of Johnnie Walker, which delivered double-digit growth across all regions to surpass 21 million cases globally.' (Sharesmagazine, 2022) There was also a '27% jump in whisky sales, including a 31 per cent rise for premium brand Johnnie Walker.' (Reid, 2022) Diageo also said they 'benefited from the on-trade recovery, continued premiumization trends, with our super-premium plus brands up 31%.' (Sharesmagazine, 2022) Johnnie walker does indeed fall into Diageo's super-premium plus category, therefore contributing towards Diageo's recovery, meaning their comeback was particularly effective.

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