

Walkers

A testimony to the power of local advertising.

INTRODUCTION

This case study documents the introduction of Walkers crisps into the Irish market in March of this year. It demonstrates how the brand confronted the market leader and within 12 weeks of launch, established a 13% market share.

It did this despite a commitment to premium positioning and distribution levels that were rising through the launch phase but were then in the region of 60%. In fact, the rate at which Walkers has been adopted in the Republic is unparalleled in any other market including Scotland and Northern Ireland, where Walkers would have enjoyed higher pre launch brand awareness.

Quantitative research evidence from UMS and AC Nielsen is put forward to illustrate the major contribution a single TV commercial made to the successful launch of Walkers in Ireland.

MARKETING BACKGROUND

Walkers approached Irish International in October 1999. Their ambition was to launch Walkers in the first quarter of 2000 and achieve a 10% share of the Irish crisps market by the end of that year.

This ambition seemed readily attainable. Ireland has the third highest per capita snack consumption in Europe, a relatively young population with 5% more people under the age of 15 than the UK, and one of the best performing economies in the world. These were ideal launch conditions for Walkers as a premium quality crisp brand. In addition to this, Walkers already had some positive brand equity in Ireland thanks to

cumulative advertising overspill from its popular UK campaign featuring Gary Lineker.

Gaining a 10% market share meant enticing a significant number of habitual crisp buyers away from Tayto, which had a 60-65% volume share and the kind of loyal following most brand owners can only dream of. It is common knowledge, for instance, that Irish people living abroad often ask visiting relatives to bring some Tayto supplies with them. Walkers, by contrast, could be seen as an unnecessary addition to an increasingly crowded retail sector and an expensive one at that. It would be priced at 30p versus the market norm of 22p set by Tayto.

MARKETING STRATEGY

Walkers put a number of strategic marketing options on the table but were happy to rely on the agency's local communications expertise. The initial plan was to adapt existing UK advertising footage to create an Irish launch TV ad to do the branding job. Provision had also been made for some kind of local advertising campaign to support an on-pack 'Books for Schools' promotion and/or to dramatise the results of a national taste challenge that returned an 80% preference for Walkers over Tayto.

After much consultation between agency and client, the collective view was that there was a compelling case to be made for developing a new TV commercial specifically for the Irish market, even though it would make a big dent in the allocated budget. The rationale was clear. In order to create the right kind of impact, Walkers needed to grab the attention of those



Client:
Walkers

Agency:
Irish International

Team:
Barry Dooley
Rachel Haslan
Nick Kelly
Bill Hillingsworth
Peter McPartlin



already familiar with the Gary Lineker campaign. Moreover, as a well-known overseas brand it also needed to signal its long-term commitment to Ireland. These two tasks would be almost impossible to achieve using existing UK advertising footage.

We agreed that investing some money behind the 'Books for Schools' promotion which would appear on all launch packaging of Walkers in Ireland, was necessary and worthwhile. Both client and agency were clear however that no promotion, however strong, should dominate the launch of a premium brand such as Walkers in a new market. We therefore chose to adapt the UK 'Books for Schools' advertising footage and support the promotion in a lower-key way using PR activity.

We also decided against using the nationally representative results that so clearly endorsed Walkers superior quality and taste versus Tayto as our advertising platform. To do so would have meant tackling the brand leader head on. It was not in our interest to engage in open confrontation with such a national institution. In any case we suspected that taste superiority would be better implied rather than asserted in advertising.

In summary, the launch marketing strategy for Walkers was to invest the majority of the available budget in creating and airing a new advertisement for the Irish market. It was a 'high risk' strategy. The Walkers brand would sink or swim in Ireland on the basis of public reaction to it. As it transpired, it was a risk worth taking.

ADVERTISING OBJECTIVES

The role of the advertising was to announce the arrival of Walkers but the objective was clearly to prompt trial of the brand by young Irish male 'snackers' and their Mums. At the end of the day, the Irish launch would succeed or fail on the basis of how many housewives were willing to pay a

premium for Walkers in supermarkets and how many of their children were prepared to spend pocket money on Walkers in impulse outlets. As such, the advertising clearly had to dramatise the irresistibility of Walkers crisps.

However, we felt that this rational appeal would not be enough to win over the hearts of the Irish people who really mattered. To do this we needed to reach out to them emotionally. We reasoned that the Irish launch execution needed to borrow just enough from the UK campaign style to make it a bona fide 'Walkers' commercial, while at the same time injecting enough novelty and 'one-upmanship' to position Walkers as something that had been genuinely appropriated by Irish people.

TV EXECUTION

The litmus test for our TV solution was whether we believed it could justifiably run in both the UK and Ireland. It needed to be at least as good as any of the UK executions in terms of bringing the 'irresistibility' of Walkers crisps to life, using Gary Lineker to humorous effect, and creating a piece of film with suitably high production values. We knew we were onto something when Walkers gave us an immediate green light upon their first reading of the TV script.

The creative idea was to stage a one-to-one confrontation between Gary Lineker and Roy Keane where the Irish soccer hero triumphs over his English counterpart in a typically 'Irish' context.

The advertising execution shows Gary Lineker arriving in Dublin airport with a secret stash of Walkers crisps on Saint Patrick's Day. We then follow him through the streets of Dublin where he is depicted vehemently protecting his crisps from the enthusiastic clutches of a variety of Irish people ranging from an old female street hawker to a

young mischievous boy. Finally as Gary makes his way down a quiet street away from the bedlam of the St. Patrick's Day parade, he comes face to face with a giant leprechaun who deftly steals his entire supply of Walkers. Only then do we learn that the leprechaun is actually Roy Keane.

The end line reiterates the product message: *'Walkers crisps are now available in Ireland. We think you'll be as Keane on them as Gary is.'*

MEDIA EXECUTION - STRATEGY

Television almost pre-selected itself as the lead medium for the Irish launch, not only because the Walkers brand and its "celebrity endorsement" strategy had been successfully established through the medium in the UK, but also because of the dual targeting involved. Young males (boys) would be the primary consumers but the volume purchasers would be their mothers.

The agency was also cognisant that Tayto, as market leader, had also upweighted its advertising spend considerably in anticipation of Walkers entry. TV was a core part of its media mix but by spreading its larger overall spend more widely across other media (see media spending table below) it had allowed Walkers the opportunity to "punch above its weight" on television.

A mix of both RTE and TV3 was felt

to be most and a programme hit-list was created that would successfully address both audiences.

While the campaign proper was not scheduled to commence until March 30th in order to coincide with trade distribution, two programming opportunities presented themselves in March which were felt to be too good to miss - RTE's TV coverage of the St. Patrick's Day Parade and Roy Keane's special guest appearance on The Late Late Show.

RESULTS

There was a base level of awareness for Walkers UK advertising heritage in Ireland prior to the brand's launch in Ireland. What the Irish commercial did was to achieve an immediate and dramatic rise in advertising cut-through. It increased spontaneous awareness of Walkers advertising from 40% in October of 1999 to 58% in July of this year.

One could even venture to say that Walkers raised the benchmark of snacks advertising in Ireland. The Irish commercial returned even higher positive attribute ratings than usual and over the same time-period Tayto's advertising appears to have fallen in Irish people's estimation.

Of course such advertising awareness and endorsement is of little consequence unless it translates into brand awareness. In October 1999 Walkers brand awareness was at 10%. That figure had increased to 45% in July.

Walkers Irish commercial also made a marked contribution to how the brand is now regarded across a number of relevant industry variables like quality, freshness, flavours and taste. The increase in the 'popular nowadays' rating in particular from 5% to 40%, is testament to the ability of good advertising to make a new brand appear bigger than its actual market share would indicate.

Walkers' high brand awareness and



MEDIA SPENDING LEVELS: TAYTO VS. WALKERS JAN-JUN 2000

	Tayto £,000's	Walkers £,000's
RTE/TV3	116	310
Radio	80	46
Cinema	54	-
Outdoor	203	-
Press	2	-
Total	455	356

Source: IAPI Ad-Spend

attribute scores are matched by an equally impressive sales performance. The target set by Walkers was to achieve a 10% market share by the end of the year. Yet, within 12 weeks of launch Walkers achieved a 13% share of the total crisp market in Ireland.

It is interesting for comparative purposes to note that when Walkers launched in Northern Ireland in January 1997, its share of the crisp market was only 3% three months after launch. By comparison in the Republic it was 13% after three months.

CONCLUSIONS

One could argue that the current socio-economic climate and a certain level of exposure to UK advertising combined to create the ideal launch conditions for Walkers in Ireland. A young, affluent nation of snackers was bound to take a disproportionate interest in a new premium crisp brand and some of them were already positively pre-disposed towards Walkers as a result of having seen and liked the Gary Lineker campaign.

However, against this must be placed the dominance of Tayto as a market leader which had already been taking active steps to strengthen its position when Walkers was launched. Like many other FMCG goods, crisps are a hard habit to break and brand loyalty is seldom abandoned overnight. Add to this a slower distribution build than had been hoped for and the fact that Walkers was selling at a 36% price premium over Tayto, and it is clear that Walkers success owes much to its Irish launch commercial, especially when compared to other regional launches.

Walkers were introduced into the Republic using the same product, pricing, packaging and distribution strategies as had been used in other markets. Nor was Ireland afforded any preferential treatment when it came to customising a communications programme. A series of local TV commercials had been commissioned

for the launch of Walkers in Scotland and an extensive outdoor campaign had been run to support the launch of Walkers in Northern Ireland. The launch of Walkers in the Republic stood out from its other 'regional' launches in two respects.

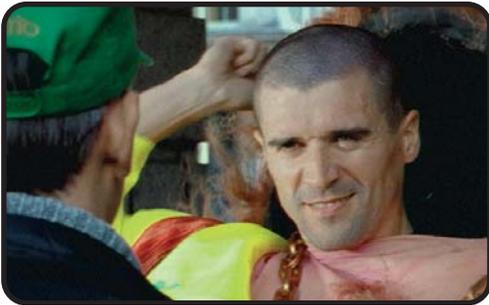
- 1. The rate of brand acceptance and market share growth**
- 2. The extent to which this success was clearly and definitively linked to the performance of a single Irish launch commercial.**

SUMMARY

This paper documents the successful introduction of Walkers crisps into the Republic in March of this year. The client's ambition was to achieve a 10% share by the end of 2000. However, despite favourable socio-economic factors and a base level of familiarity with the Gary Lineker UK advertising campaign, realising this ambition was not going to be easy.

Tayto, an Irish household name with a 60-65% market share, had an extremely loyal franchise and had already taken steps to safeguard its position. It rolled out a new TV campaign and chose to more than double its media spend (from £226,700 in the first half of 1999 to £454,800 in the first half of 2000). Walkers launched at a 36% price premium and with levels of distribution that were nowhere near those enjoyed by Tayto as the market leader.

Yet within 12 weeks, Walkers established a 13% share of the Irish crisps market – a performance due in no small part to the single Irish launch commercial created on its behalf. To illustrate this link, quantitative research evidence is put forward to show how increased advertising awareness and positive brand perception contributed to Walkers rapid share acquisition.



Television