

Agency: Bozell Worldwide, Canada Inc.

Author: Michael O'Reilly

Budweiser

EXECUTIVE SUMMARY

It was mid 1994, and Budweiser was a big, healthy brand in Western Canada, but it was struggling in Ontario, with borderline critical mass, and no momentum. This could not continue.

There would be no help from the market. National and Ontario volume was flat. And the 1993 'ice wars' between Labatt and Molson had made Ontario an intensely competitive and cluttered marketplace.

It was essential for Bud to attract new users, without alienating current users. Analysis identified three barriers to overcome:

- Bud's masculinity image: the rough, tough, macho cowboy – doing so well in Western Canada – was not working in Ontario.
- Bud's product image: it was seen as weak, watery American beer, imported from the US (even though it had been brewed in Canada since 1980).
- Bud's media: it was not breaking through the summer clutter.

In July 1994, we launched a multimedia campaign that broke these barriers down. First, it established 'Ontario' masculine values. Second, it delivered a compelling product story. Third, it broke with traditional media strategy – putting the bulk of Bud's television outside the main summer months.

Response was immediate and sustained. Versus the base year, Bud's Year I share increased 0.7 points – a lifeline to a brand at borderline critical mass. Year II was 1.2 points ahead of base year, and the momentum continued in Year III, with July-December 96 share 1.8 points ahead of base. This was a remarkable turnaround – particularly in such a competitive market, with each share point worth about \$20 million at retail.

SITUATION ANALYSIS

Ontario is Canada's most important beer region, with just under 40% of total beer volume. It is highly competitive, with the most beer brands of any province, and frequent new product launches. In Western Canada, Bud was a strong, healthy, growing brand. In Ontario, Bud had plateaued at less than one third the Western share – averaging -0.2 points vya for the 18 months through June 94. It was essential to turn this around, and get Bud to a share that would sustain critical mass.¹ A new campaign was needed for July 1994. The media environment was intensely cluttered. In a market spending around \$25 million a year in measured media, Bud had to cope with the 'ice wars' of 1993, plus major brands and various specialty entries. See Table 1 and [Figure 1](#).

TABLE 1: MAIN SPENDERS AND SHARES OF VOICE (SUMMER 1993)

| | | | | | | | | |
|---------------|---------------|-----|-------------------|----------------|--------------|---------------|-------|---------------|
| Molson Cdn | Labatt Ice | Bud | Labatt Gen Dry | Labatt Blue | Molson Ex | Molson Dry | Coors | Blue Light |
| 13% | 11% | 10% | 7% | 6% | 6% | 6% | 6% | 3% |

The market was flat, so growth would have to come from building share. Analysis identified three main barriers:

1. Bud's 'Cowboy' image

Users and non-users knew that Bud stood for rugged masculinity. But they had different ideas about the cowboy as a brand icon. It was a strength in the West, but it was not aspirational to Ontario non-users. According to proprietary research, they believed that Budweiser was for an older, blue collar drinker; a bit of a loner, non-active, and a little out of touch.

They also felt that a cowboy was a poser – irrelevant and superficial. Clearly, we had to find the right masculinity for Ontario non-users, and still appeal to the current franchise.²

2. The 'American Beer' issue

Current users did not credit the US with good beer credentials (though they liked aspects of American culture such as freedom, confidence, pride, and adventure.) Non-users saw American beer as weak and watery, and this cast a negative image over Bud. Furthermore, more than half of beer drinkers (53%) believed Bud was imported from the US, even though it had been brewed in Canada since launch in 1980. Only 65% knew that Bud was a regular beer with standard 5% alcohol. These misconceptions had to be fixed.

3. The 'Summer Clutter'

Bud had a competitive budget but it was not enough not break through in the peak summer season with head-to-head spending. We had to break through by ingenuity, not brute force.

STRATEGY AND EXECUTION

1. The Budweiser image

Our target was 19-24 year old male drinkers. We knew what did not appeal. We had to find what did. Research uncovered the 'Ontario' insight:

'There's a voice inside every man that inspires him to greatness on his own terms.'³

This masculinity revolves around striving; going through hell and high water to reach a goal. A real man (in Ontario) does things for his own satisfaction; unconcerned about praise from others. This was very different from Western Canadian masculinity – an outward projection of a rough and tough image – which explained why the Cowboy had worked well there, but not in Ontario.

Non-users found two additional attributes – aspirational confidence and winning. Although 'American', they saw them as part of what Bud could stand for. This led to the strategic focus:

'Inherently masculine situations, showing striving to achieve a difficult personal goal, with an attitude of confidence and winning (but no cowboys).'

This strategy also met the requirement not to alienate current users. They liked Bud's (cowboy) masculinity, but found it somewhat uni-dimensional. The new focus updated Bud's image for them in an aspirational way.

The image campaign was carried by 30 TV. Two spots: 'Boxer' and 'Mountain Biker' hit the air in July 1994. They had a gritty reality, and carried the storyline with a terse string of statistics in voice-over and supers.

'Boxer' shows a boxer doing multiple sit-ups. The voice-over and supers outline his struggle to get '1 Title Shot'. We feel his strength of character; his ability to overcome the odds. But his drive is not about the cheers of the crowd. It's the voice inside, inspiring him to greatness on his own terms.

'Mountain Biker' features three hard-riding weekend warriors overcoming the biggest obstacle in mountain biking: a 300 foot cliff. This injects Bud's image with vitality and energy (recall the 'loner, non-active' findings in research.) One of the riders is a woman. This reflects the attitudes of young men in Ontario, who see women

as equals and part of the gang. (In contrast to Western beer drinkers, who still see women to some extent as sex objects.) The campaign continued through 1995 and 1996 with 'Cliff Jumpers', 'Comeback' and 'Enforcer', all with the same attitude, and the 'statistics' storyline.⁴

2. Beer itself

The barrier to trial was not the product itself, but the perception. We had to reassure consumers that Bud was brewed in Canada with 5% alcohol. Research gave us the key. The motivating claim was the straightforward fact: 'Brewed in Canada'. This would put Bud on a level playing field with other mainstream Canadian beers in Ontario. Then, the image could be layered on top, to create a viable, growing brand.⁵

Product ads began in July 1994, via outdoor, radio and television. Outdoor and radio focused on 'Brewed in Canada', featuring 5% alcohol. Television was more holistic. It added heritage and unparalleled brewing tradition. The TV execution also preserved campaign continuity via the 'statistics' format.

3. Media

The media strategy can be visualized as a bridge. The 'shoulders' in the Spring and Fall are the main medium: television. The span across the Summer is outdoor, interior transit, and radio.⁶

Because of traditional beer spending patterns, we knew this strategy would increase Bud's share of voice in the shoulder seasons. But did it make sense for the brand? The decision was validated because Bud's target (users and non-users) are heavy drinkers. They drink almost as much through the winter months as they do through the summer, averaging 13 plus beers a week. Outdoor, Transit, and Radio carried the 'Brewed in Canada' message in the Summer, to maintain presence. We would find later (see Results) that this strategy worked superbly.

RESULTS

Share response was immediate, steady and sustained. We prefer not to show absolute shares, but the increments show an unmistakable pattern. Against the 12 months of July 93 to June 94 as base year, share increments were continuously ahead of base for two and a half years, with the following cumulative result. See [Figure 1](#) and Table 1.

TABLE 1: BUDWEISER INCREMENTAL SHARE VERSUS 93/94 BASE (ONTARIO)

| 1994/95 | 1995/96 | 1996/97* |
|----------|----------|----------|
| +0.7 pts | +1.2 pts | +1.8 pts |

* July – December 96

Claimed regular usage followed the same pattern. And among the key 19-24 male target, share jumped even more sharply, reaching double and triple the usage in the selected base period. See [Figure 2](#) and [Figure 3](#).

Against the three barriers, we were clearly successful:

1. The Budweiser image

Creative revitalized the image in Ontario. It made masculinity relevant. It injected vitality, and shrugged off staidness. The message of the campaign, Man as Unsung Hero, reaffirmed the essence of Budweiser. (Source: proprietary Labbatt research.)

2. The beer itself

Over the advertised period, awareness of 'Brewed in Canada' increased significantly during

advertised periods. See [Figure 4](#). Awareness of 5% alcohol and Bud's broader beer credentials also grew strongly.

3. Media and the summer clutter

By loading up the 'shoulder' seasons, we achieved our SOV pattern. See [Figure 5](#). More concretely, this delivered results. Total unaided brand awareness held up across the Summer months. See [Figure 6](#). This was despite the lower share of voice between the shoulders. And, as already indicated, usage responded dramatically.⁷

CONCLUSION

This is a vivid example of a sustained turnaround from threshold critical mass, driven by advertising.

It's also a fairly rare (apart from Quebec) example of a brand running distinctly different campaigns by area in Canada. Budgets are an obvious factor, but this case shows that it can be right to tailor campaigns to a given area. The case can also be added to the debate about the 'transportability' of campaigns⁸ . . . within Canada, and across borders.

ENDNOTES

1. Counterpunching. Building up from borderline critical mass.
2. Attracting new users, without alienating current users. See also Dove and Philly , for other examples of how 'halo-ing' works in advertising.
3. Digging for Insight.
4. Evolving a long-running campaign. Bud's image executions are reasonably similar in format. Compare ' I AM' executions, which tend to be different.
5. Emotional + Rational. Should emotional and rational appeals be blended, or kept separate? Bud delivers Emotional (image) and Rational (product) mainly by separate executions. So does Walt Disney World with ' All the Same Inside' and ' Passport at Par' . Alternatively, Chrysler and Philly, among others, blend the appeals.
6. Noteworthy media. It's rare, not to say gutsy, to advertise away from the peak season in your main medium, especially when your brand is struggling to establish critical mass!
7. Breaking conventions. In addition to the media thinking, see the comment under Conclusions about changing campaigns within English Canada.
8. Transportability of campaigns. Some international campaigns do well here; but some fail. (And some Canadian campaigns 'export' well to the US and internationally.) It would be useful, not to say controversial, to publish a list of successes and failures.

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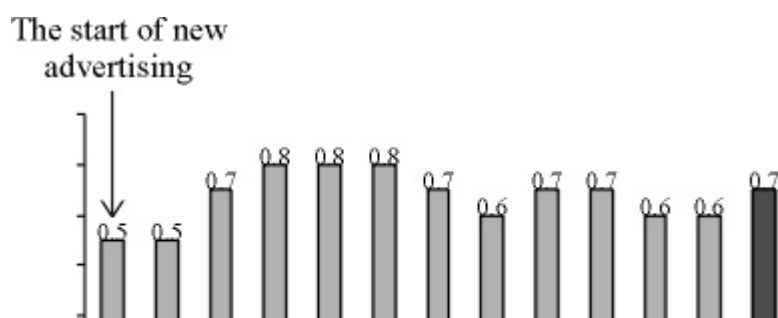
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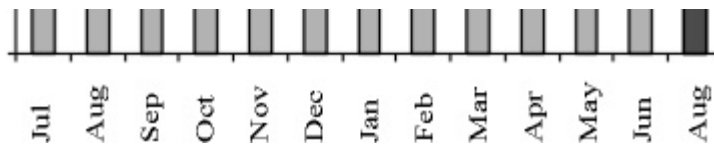
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NOTES & EXHIBITS

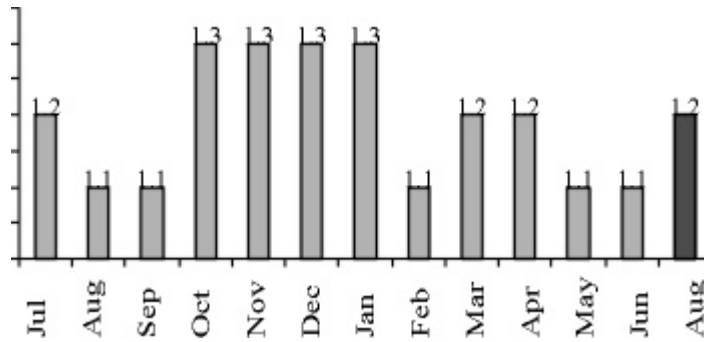
FIGURE 1

94/95: Budweiser Ontario share change (vs base year 93/94)





**95/96: Budweiser Ontario share change
(vs base year 93/94)**



**96/97: Budweiser Ontario share change
(vs base year 93/94)**

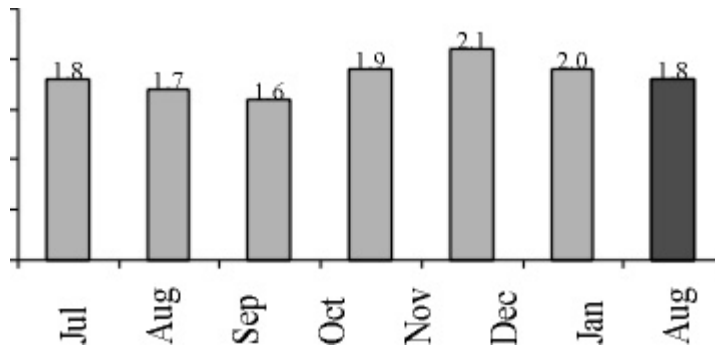
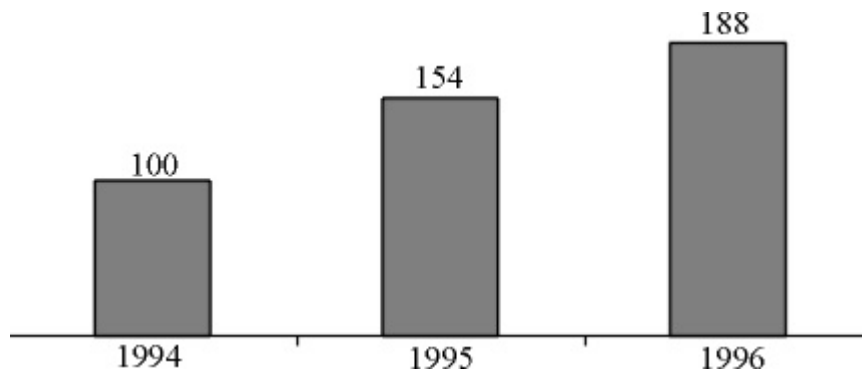


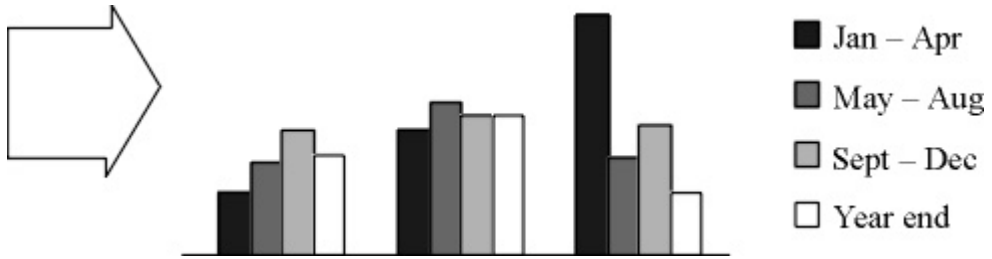
FIGURE 2: BUDWEISER CLAIMED REGULAR USAGE IN ONTARIO



Index versus 1994

Source: Labatt Breweries of Canada

FIGURE 3: BUDWEISER CLAIMED REGULAR USAGE (19-24) IN ONTARIO



Index versus the base period (January to April 1994)

Source: Labatt Breweries of Canada
