

International Marketing Strategy of Wm Morrison Supermarkets PLC

International marketing

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1. Introduction

Wm Morrison Supermarkets PLC plans to enter a retailer market segment in Indonesia. This portfolio will prepare the marketing department to devise a marketing strategy based on customer cross-cultural analysis and Indonesian market assessment.

Morrison is the 4th largest food wholesaler based in the UK. Morrison has brands such as The Best, Little Kitchen, Free from, Taste, Savers, Nutmeg, Safeway, Veggie, and Wonky. Morrison has 497 stores spread around the UK, Netherlands, Isle of Man, Hong Kong, Jersey, Guernsey and Gibraltar. The Morrison stores are served by 8 regional distribution centres and 1 national distribution centre (Annual Report – Morrisons, 2022).

Indonesia is one of the fastest emerging economies in Asia. It has a total population size of 273,523,621 in 2020, current total GDP of \$1.06, a GDP per capita of \$3869.6, and a slightly high unemployment rate of 4.4 % (World Bank Indonesia Data, 2022). The country has substantially improved its business environment and according to data published by the Ministry of Development of Indonesia, its Ease of Doing Business rank is 73rd out of 190 economies (Ease of Doing Business Indonesia, 2022).

2. International Market Analysis

(i) International market assessment

(a)

PESTEL

Analysis



Fig 1: PESTLE Analysis

(Source: PESTEL Analysis, 2022)

Indicators	Description
Political	<ol style="list-style-type: none"> 1. Indonesia score 59 out of 100 in terms of political and civil rights, which is better than its neighbouring countries (Indonesia: Freedom in the World, 2022). 2. It has a presidential form of government with the president presiding over both state and government (Politics in Indonesia: Resilient elections, defective democracy, 2022). 4. Rise of identity politics stokes segregation among citizens. 5. No significant progress on much-needed economic, legal, and political reforms
Economical	<ol style="list-style-type: none"> 1. Economy is expected to grow by 5.0% in 2022 and 5.2% in 2023 as domestic demand continues to recover. 2. Consumer spending and manufacturing rising due to a boost in incomes, jobs, and confidence. 3. Inflation averaged 1.6% in 2021 and will rise to 3.6% in 2022, due to a rise in commodity prices and fast economic growth (Indonesia's Economic Growth – ADB, 2022).
Social	<ol style="list-style-type: none"> 1. Women's rights and gender equality improved after the transition to a democratic form of election. 2. Civil society groups flourishing through Civil Society Organisation (CSO) and NGOs. 3. Improved laws enable and instigate the participation of civil society groups (Social, economic and political context in Indonesia, 2022). 4. Rise in religious intolerance gives way to civil unrest (Five Urgent Issues for Indonesia's President to Address, 2020).

Environmental	<p>1. Environment problems such as deforestation, water pollution, industrial waste and sewage leakage, air pollution in urbanized areas, smoke hazards and forest fire hazes are rampant.</p> <p>2. Environmental Laws are present but do not suggest any technique or ways parties responsible for environmental damage can be held liable to repair the damage.</p> <p>3. Individuals can face imprisonment for intentional or negligent actions causing environmental pollution to exceed the maximum limit (Major projects: environmental risks in Indonesia: overview, 2018).</p>
Legal	<p>1. Domestic laws and regulations provide a proper and healthy environment for Indonesians.</p> <p>2. Several international conventions and agreements such as UN Convention, Vienna convention, Basal Convention, and Stockholm Convention have legal bindings between Indonesia and major international bodies (Major projects: environmental risks in Indonesia: overview, 2018).</p> <p>3. Violations of human rights exist such as arbitrary arrest by police, restrictions on free expression, the press, and the internet (Country Reports on Human Rights Practices: Indonesia, 2020).</p>
Technological	<p>1. Information and communications technology sector will lead economic growth in Indonesia in 2022 (Rahman, 2021).</p> <p>2. The key segments that can drive the Industrial Revolution 4.0 in Indonesia are food and beverage, automotive, textile and clothing, electronics and footwear (Innovate Indonesia, 2020).</p>

Overall impact assessment

Indicators	Impact	Overall
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	High/Medium/Low	Impact
Political	High as a presidential form of government instils sweeping powers in all matters on state and nation, causes high handedness of ruling political parties.	Medium
Economical	Low as Indonesia is one of the fastest emerging economies with strong macro-economic indicators, no sign of sovereign debt or bail out crisis	
Social	The low transition to democracy brought fresh changes that leads to holistic social improvement.	
Environmental	Low as environmental laws are present but some loopholes make accountability and liability difficult to place on offenders.	
Legal	High as there are new draconian laws that impinge on human rights and liberties.	
Technological	Low as the nation is prepped to leverage the Industrial Revolution 4.0	

(ii) Different market entry strategies

There are various international market entry strategies such as licensing, direct exporting, franchising, partnering, joint ventures, and greenfield investment. These 2 types of strategy are discussed such as direct exporting and joint ventures (Market Entry Strategies, 2022).

(a) Direct Export

Morrison can take the help of local distributing agents to enter the nooks and corners of the Indonesia retail segment. Morrison has very limited knowledge of the market dynamics of South East Asian economies as it has a presence in only one region i.e., Hong Kong. Local distributing agents have the required market knowledge to push Morrison's product on small, medium and big retailer shelves in Indonesia. Direct exporting is less capital intensive as there are no requirements for fresh infrastructure development in Indonesia. This strategy provides

Morrison with an excellent way to try and test the market, observe the reaction of the consumer such as their product preference and approach in a planned way. Exporting has problems such as total dependency on distributing agents and less control on the ways products are distributed for better customer acquisition, sometimes there can be a conflict of interest with other retailer products in distribution (Yacob et al., 2020).

(b) Joint Ventures

Morrison can form partnerships with local domestic players through which a third independently managed company can be established. Joint ventures provide synergies that cannot be achieved easily on basis of individual effort for any company. Local domestic players already have a stable customer base and are well acquainted with the market dynamics. This can provide Morrison with the much-needed guidance in the initial stages of market exploration and entry. The benefits are not just limited to Morrison only. Domestic players looking for faster business expansion in Indonesia can build upon the FDI inflow that Morrison can bring from investors based in other countries (Suseno et al., 2021). The recent revision of laws related to foreign ownership limitations has replaced the previous cap of 67% on ownership limitation through FDI to 100% now. Morrison can increase its stake in the newly established company as it develops a strong foothold in the Indonesian market for a final buyout later (Indonesia's New Investment List Increases FDI, 2021).

(iii) Impact on market entry strategy

(a) Export Strategy

The politics of Indonesia is driven by identity-based adherence to ideologies. This creates tension among rival parties which can disturb the normal business environment including small medium-class distributing agents. Although this is no significant economic impact on export strategy, Indonesia's dependence on FDI to fuel its economic growth can be a cause of concern. Developed economies can decrease FDI to divert its fund for war preparations. Low FDI will lead to low economic output and this causes GDP contraction and a rise in inflation. This can hurt buyers' disposable income and they can discard foreign products and switch to very low-cost domestic substitutes (Yacob et al., 2020). In a social context rising religious intolerance among hardliners is bad for any business including agents and distributors. On the technological front, there are no significant impacts that can hurt export. On the

environmental aspect, the onus to adhere to environmental laws is passed to local distributing agents, shielding Morrison from any environmental misconduct.

(b) Joint Venture

On the legal aspect, Indonesia does not have any law that specifically recognizes joint ventures as a separate legal concept. Joint ventures in Indonesia are recognized as Incorporated Joint Ventures which is regarded as an Indonesian legal company. An Incorporated Joint venture like this can do business only upon approval of its incorporation by the Minister of Law and Human Rights. Under the present laws of human rights, the president director of such a joint venture can wield unobstructed rights in all matters. Thus friction points can arise due to conflicts of interest between the president director and board members (Bunjamin, 2022). Another common problem that can arise is a governance issue that can result in a deadlock between Morrison and the local domestic company. Such governance issue occurs due to board composition, reserved matters, or higher quorum and requirements of voting under Indonesian law. Disregarding laws related to environmental safeguards can result in penalties, fines and imprisonment arrest as Indonesia has a low tolerance for matters related to environmental degradation.

(iv) Most suitable method

Joint Venture

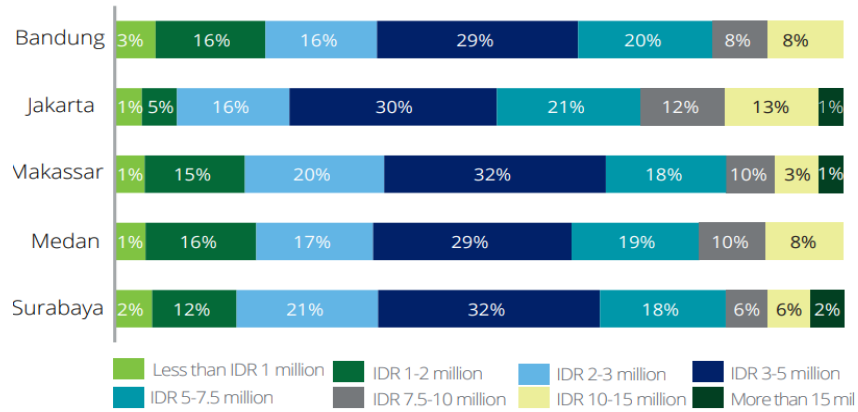
The joint venture is the most cost-effective strategy for Morrison to enter Indonesia. This strategy will help Morrison gain from the expertise and guidance provided by local retail partners. Although Morrison has to bear certain capital investment costs, it can build from its experience gained by operating in Hong Kong which is culturally dissimilar to the UK but with few similarities with Indonesia. If direct export was chosen as a strategy then the distribution is not under Morrison's control. The export strategy involves significant transport costs due to the rising price of fuel and the exchange rate fluctuations can also hamper its profitability. Through the joint venture, Morrison can source directly from Indonesia's home market which

is significantly less costly than exporting overseas. In case the home market supply chain falters, Morrison can temporarily switch its sourcing base to the UK to keep production running. Besides these reasons, another important reason is Morrison's exposure to culturally different markets such as Hong Kong. It is located in East Asia but it has few cultural similarities with Indonesia. For both Hong Kong and Indonesia, culture and business environment are intertwined with each other in such a way that understanding one part is impossible without understanding the other. Thus joint venture is a more holistic strategy for Morrison, to understand, how cultural differences affect consumption habits and utilize the knowledge gained, to cater for the target customers effectively. Dutch grocery store spar is a good example to showcase how Joint ventures can be a successful market entry strategy. Spar Indonesia is a joint venture between Amsterdam based Spar International and local retailer Ramayana Lestari Sentosa, which became active in 2014 and continued successfully till 2018 (History of SPAR International, 2022).

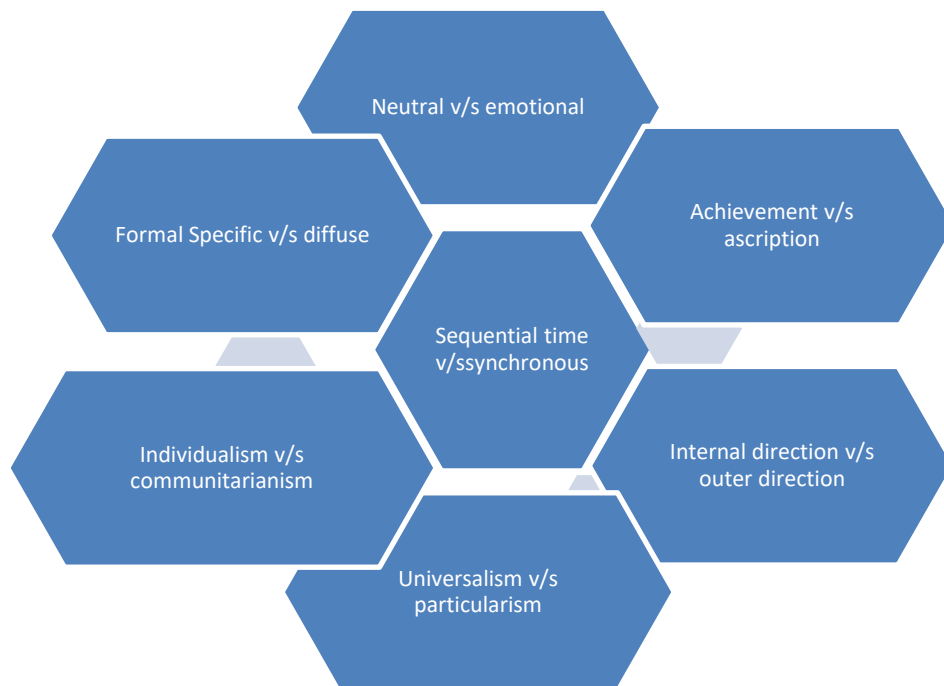
3. Cross-cultural research and analysis

Trompenaars' 7 Cultural Dimensions is used for cross-cultural evaluation between UK and Indonesia and the ways it affects target customers in the foreign market. The marketing team can understand how the cultural differences can become both a challenge and an opportunity to position the brands sold under Morrison in Indonesia's retail market segment.

The main brands that be launched are The Best, Little Kitchen, Free from, Taste, Savers, Nutmeg, Safeway, Veggie, and Wonky. The target customers are those citizens whose monthly household income is between IDR 3 to IDR 5 million and those whose income is between IDR2 – and IDR 3 million. These two customer segments are part middle income and upper-middle-income distribution and together these two form almost 45% to 50% of all the populations in major cities such as Bandung, Jakarta, Vlakassar, Medan, Surabaya (Deloitte Consumer Insights, 2021).

Monthly household income distribution**Fig 2: Monthly Household Income Distribution**

(Source: Deloitte Consumer Insights, 2021)

7 Cultural Dimensions of Trompenaars**Fig 3: Trompenaars' 7 Cultural Dimension**

(Source: Carolina, 2019)

Achievement v/s ascription:

Preference for titles has relevance in the social customs of Indonesia where there is a clear distinction in the way elders are called. In the UK, the customary relevance for use of titles in social exchange is less. The use of normal titles such as “Sir”, “Mr”, “Miss” and other is prevalent all across Europe including the UK. But it does not have a high social relevance as sometimes young and old are called by first names on several occasions. In Indonesia, the use of titles conveys respect and attaches a social status to the person addressed. Keeping this distinction in mind, the product promotion strategies of Morrison toward its target customers should not be divisively targeted which creates an arbitrary customer perception of “product for the rich” vs “product for the poor”. At the same time, the product positioning cannot undermine the social strata based on titles and power (Yunus, et al., 2019).

Neutral v/s emotional:

Indonesians are generally emotional people, as shown in the studies. While the UK has a more restrained way of expressing emotions, which sometimes can be called a neutral expression. This different cultural trait is both a challenge as well as an opportunity for Morrison (INDONESIA, 2018). Indonesia is an emerging economy where the target customer segments based on monthly income as discussed before representing a good percentage of the population but more importantly they form the core driving engine of the economy. Thus the product promotional advertisements Of Morrison should create a perception among the target customer about the importance of their contribution to national development. This will make the target customers align their preference toward a product or brand that can relate with the middle-class sentimentality. This emotional quotient raised among the customers will slowly increase the product switching from competitor brands that do not catch the middle-class sentimentality to the brands promoted by Morrison.

Internal direction v/s outer direction:

The cultural values of the UK have taught us to create an amicable situation for ourselves by controlling the external environment while far east cultural value, including Indonesia, emphasizes aligning one internal environment with the external environment. For Morrison, the products should not try to glorify and uphold virtues that instigate a sense of fight for

survival against the external environment. Instead, the product promotions should convey a sense or feeling where man and the environment do not have to win over each other but live harmoniously.

Sequential time versus synchronous time:

The UK and advanced western economies adhere to a sequential form of time where each event has a certain starting and ending point. In the case of Indonesia, the perception of time is synchronous with no definite starting or ending point assigned to an action or event. For this reason, Indonesians can start multiple tasks parallel and go to and forth in between tasks as and when required (Yunus, et al., 2019). Asynchronous time creates a different problem for Morrison. In the UK, Morrison announces seasonal offerings and promotions that have specific time limits for consumers to respond. In the case of Indonesia defining a specific time limit or period for any promotional offers may not elicit any extra attention from target customers. This creates a problem as not defining a specific time limit can almost create situations where seasonal offers overlap or clash with each other. For Indonesians, this can be normal and can go unnoticed. For Morrison, this is an issue, as it cannot discern the exact reason for a boost or fall in seasonal sales, due to overlap of promotional messages.

Universalism versus particularism:

The UK and advanced economies follow universalism where rules and obligations have more importance and rules dictate the way people deal with each other. In the case of particularism, the rules and obligations are not static but dependent upon the circumstances and relationships at that point in time. As relationships are not dictated by rules in particularism, it takes time to build a relationship based on intrinsic human values. For this reason, Morrison's product or brand or company positioning in customers' perception should not be based on the external value proposition of rebates, discounts, cashback, gifts, coupon points, and free tryouts. The brand or joint venture company has to transform itself from merely a non-living legal entity to a living entity that empathizes with the target customers (Toyama & Yamazaki, 2018).

Individualism versus communitarianism:

The sense of unity and belonging stems from the strong community-based lifestyle among Indonesians. In the UK the sense of belonging for a citizen can emanate from being part of his or her motherland without the referral of any particular community. For Indonesians, the sense of belonging first emanates from being part of a specific community and then being part of the larger geography, of Indonesia. This distinct feature between the UK and Indonesia needs to be addressed differently while product positioning. Morrison thus has to devise a strategy to target both customer segments, tailored to the specific needs and wants of the regional community.

Specific Versus diffuse relationship:

A specific relationship involves communicating directly without clear descriptive words, that are easy to interpret. A diffuse relationship uses an indirect communication method to convey the intention of the message. In Eastern originated cultures a direct message can be regarded as offensive and odd while it is more common and expected in western cultures. For Morrison, this creates an opportunity to convey aspects of social issues through its advertisements in a very non-direct and subtle way, which does not create awkwardness while watching with members of different age groups, different community, as well as different religions and yet convey a very powerful message, which resonates with the emotion of the viewer.

4. Impact of cross-cultural issues on international marketing -mix strategy

In this section, the strategies of the marketing mix adopted by the joint venture company between Morrison and the local retail partner are discussed. More importantly, the discussion also includes the implications of cultural differences on such marketing mix strategies.

(i) Promotion strategy

Morrison's brand position strategy in the UK is evident from the brand message it carries in its promotions, which is "Our Brand. Lower Prices" (Dishman, 2019). This is also evident from the seven priorities set by Morrison as its business goals, out of which 5 are business operational focussed and only 1 each is customer-focused and community-focused (Annual Report – Morrisons, 2022). The product promotion strategy should not be focused on monetary value creation but intrinsic value creation for Indonesians. There are more

competitively priced products and cheaper substitutes that are readily available for the target customers, who are mainly middle to upper-middle income groups. Thus the promotional strategy should create a perception among the target customers that shifts the way customers viewed their role in society. For example, the contribution of the middle class to community development and nation-building can be portrayed through advertisements. The motto for the promotional strategy is to create a humane relationship with target customers. Once the initial steps of relationship building are successfully carried out, Morrison can speed up its brand awareness campaign through the usual medium of TV and radio. Community-based events should be used for silent brand promotion at regional levels. The inter-community relationship depends on trust and bonds. The focus is to increase the trust factor with the few communities at the beginning. As the relationship strengthens, inter-community communication does the rest through word of mouth, to spread brand awareness. Morrison is partnering with a local domestic retailer, it can also use the personal selling channel of the domestic partner (Niazi et al., 2021). Indonesia was slow to adopt the modern way of shopping in place of traditional shopping mainly because it adhered to community-based activities. For this reason, the internet and e-Commerce platform is the usual preference for lifestyle products, but basic necessities are accessed through offline mode, which is also the case with the target customers. Thus offline promotional activity is the focus.

(ii) Product strategy

Indonesians are highly family and community-oriented. Community plays a vital role starting from a child's birth to its finality. This close inseparable bond between family and community should be the prime focus of how products are portrayed (Indonesia: Exploring Indonesian Culture, 2022). The focus should be to build upon the emotional quotient of the target customers to create a unique product experience. As pointed out in the cross-cultural evaluation that Indonesians tend to be emotional and when it comes to food, the emotional gradient increases as food is an intrinsic part of life. Almost 66% of the Indonesian population belongs to the age group of 20 - 64 years (Statista Age Structure Indonesia, 2022). While the target customer segments constitute close to 45% to 50% of the population. This indicates that a portion of the target customers also belongs to the age group of 20 to 64 years. The focus on the initial phase of market entry is offering an assortment of precooked traditional dishes. The hope is pinned on the target customers who are young and in the middle-income

group, do not have time to cook or do not want to cook and yet want to reminisce the taste of home-cooked traditional dishes. Although Morrison can introduce normal packaged raw or processed food products, there are already similar products offered by competitors. Morrison's packaged and processed food products will only be seen as just another company offering the same materials in a different package, thus eliciting no curiosity to try a new product. This is why the initial product offering is meant to elicit excitement and curiosity and at the same time meet the customer's needs, wants and demands.

(iii) Place strategy

A survey carried out by Deloitte indicated that 70% of the respondents from all the cities have not used social media platforms for purchases. The survey also showed that 63% to 80% of the target customer groups who belong to the middle income and upper-middle-income group within the age bracket of 25 years to 64 years have either never used the social media platforms or have used them less frequently for payments and transaction (Deloitte Consumer Insights, 2021). Respondents are more comfortable using cash and are concerned with issues such as security, scams, privacy issues, and unstable internet connection (Deloitte Consumer Insights, 2021). For Morrison, this means that there is a less likely chance for a successful conversion from a potential customer to an actual customer using online promotion strategies. Morrison can use the online platforms for paid or free promotions for general promotional purposes but the target customers may not be reached if the online mode is used. Indonesia's reliance on the traditional shopping model is part and parcel of cultural practice, where customers usually buy from the known grocery vendor or food vendor day in and day out through an interactive social exchange and sensory perception. The move from a traditional model to a modern convenience store type shopping and even more modern such as internet-based AR (Augmented reality) and VR (Virtual reality) is less attractive as target customers feel the autonomy of decision in such interactions is diminished. This can be partly attributed to the particularism and communitarianism mode of culture in Indonesia where people feel they have autonomy in their decisions and the system also allows for all participants to be involved in the decision-making process. Here the system is a dynamic market place and the people involved in the decision-making process are suppliers, sellers and buyers.

(iv) Price strategy

A significant portion of Indonesians relies on traditional grocery and retailer shops, where haggling and negotiations finalize a deal. This is a bit different than what is usually observed in advanced economies like the UK, where street-side grocery shops are quite fewer. Indonesia's age-old practice of haggling is part of its cultural heritage which follows particularism. Thus instead of following predefined rules such as paying the fixed and set prices, there is always a tendency to respond differently in a different situation. Thus rules are secondary to situations, as situations change, rules change (Thabit & Raewf, 2018). This gives autonomy to people to form their own decisions. Thus Morrison should factor in the price sensitivity of the consumers. If the product is priced very cheaply then it may not find many takers in Convenience and Supermarket stores as target customers can deem it as a substandard product. Keeping a premium price will drive away target customers towards substitute or competitor brands. The initial products offered to elicit customer curiosity are simple packaged precooked traditional dishes. The price of such pre-cooked packaged traditional dishes will also elicit a different reaction from the same income group such as middle income. If the price of the product exceeds the total cost of assorted raw materials if bought separately from the market by the consumer, then the people who know how to cook and also have time to cook will reject the product. This seriously diminishes the target customer segment and makes the success of the product dependent on people with no knowledge of and time for cooking.

5. Conclusion

The market evaluation of Indonesia indicates a semi-stable political scenario and strong economic forecasts. The democratic form of election exists but democratic practice by the presidential government is in question. Indonesia is witnessing a major social, and technological transformation. Improved social conditions and technological infrastructure development attract FDI. On the other hand reports of human rights, violations and social unrest by civilians demanding better governance and accountability from the government can dampen the positive business outlook it created and this can hurt FDI inflow, slowing down the economic progress and Industrial Revolution 4.0 in Indonesia. Legal and environmental hurdles exist such as draconian laws and weak environmental protection plans. Considering these situations a joint venture between Morrison and a well-known domestic retailer is

suggested. The customer level cross-cultural difference evaluation between the UK and Indonesia revealed certain traits that are specific to each type of culture and the ways those traits can affect the product positioning of Morrison for the target customers in Indonesia. Foreign retailers from UK and USA have made a successful market entry in Indonesia before such as Carrefour and Spar International. Although most of them eventually merged with other players later or sold their businesses. Thus Morrison should tread carefully while expanding in Indonesia, piggybacking on a local domestic retailer through a joint venture company.

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