

SINCE 1857  
JOHN WEST

# CANNING THE COMPETITION: HOW JOHN WEST REASSERTED ITS LEADERSHIP

Project Title: John West Re-brand  
Category: Packaging  
Sub Category: Branded - Food  
Client Company: John West (MW Brands)  
Design Consultancy: Coley Porter Bell  
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# EXECUTIVE SUMMARY

John West is a well-loved brand, with people having great affection for it! Yet in 2010-11 it was steadily declining in a commoditised category. Consumers had become accustomed to buying on price.

This meant that this established brand was contending with some serious issues that had resulted in it falling off its prized top spot, losing share to its main rival, Princes, as well as supermarket own-label.

Leap forward to 2012 and John West has regained its desired number one position as the leading canned fish brand in the UK achieving record growth both in value (21.8%) and volume (19.1%) and far exceeding category growth of 7.9%. (In fact, without John West the category would have only grown by 2.3%.)\*

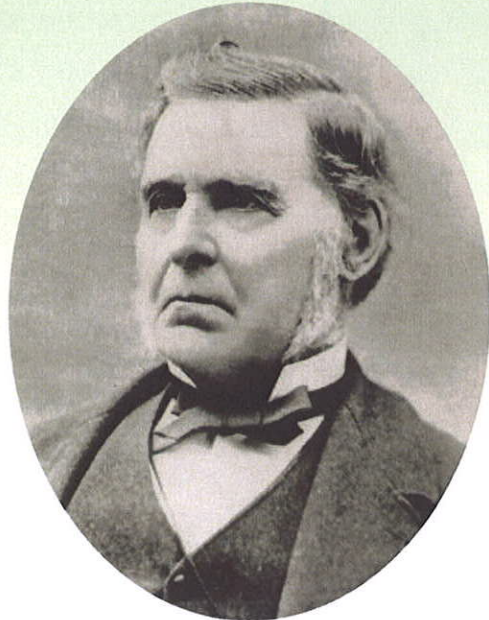
It now represents 32.5% value share of the market and has notched up an impressive increase in revenues of £28.7m year-on-year since the brand was re-launched. This makes John West the leading canned fish brand both in terms of value and volume meeting its key business objectives.

So, what made such a difference? Well by simply focusing on what people loved about John West. Its heritage, its expertise, and its knowledge of the sea. It is these factors that helped to reaffirm the impression that John West still offers the best quality tasting fish.

Captured in the idea 'Leading the way since 1857', the re-design has contributed to consumers perceiving the brand as being more pioneering, innovative, and exciting, as well as a sustainable champion.

It has made people reappraise the brand and given them a compelling reason to purchase beyond just price alone. Given this is canned fish, a low involvement, low emotive category, unlike confectionery or soft drinks for instances, this is a massive achievement in itself.

John West would be proud.



*Captain John West, Founder.  
(1809 - 1888)*



(294 words)



# PROJECT OVERVIEW

## Project Brief

John West has the highest brand awareness in its category with significant preference over its main rival, Princes. In research, people were very easily able to articulate what made John West special – its heritage. However this preference wasn't translating into purchase at shelf nor was it reflected in their market share position.

The issues the brand faced were compounded by the majority of market volumes being sold on promotion, which further encouraged the commoditisation of the category and devaluing of the brand.

Upon review, the brand lacked any real emotional engagement and did not offer people a strong rational reason to justify a price premium versus supermarket own-label.



Old Tuna Packaging

## Business Objective

- To reposition John West brand in the UK to clearly differentiate and leverage it above the competition, primarily Princes
- To become the number one canned fish brand in the UK in terms of value and volume
- To improve the average price in the market thereby increasing profitability over the next three years

## Design Objectives

- To develop packaging that reflects the newly defined positioning of 'Leading the way since 1857'
- To simplify the shopper experience by reducing visual clutter and presenting a clearer range hierarchy
- To achieve standout on shelf and demand reappraisal from consumers
- To modernise the brand to make it feel more dynamic and progressive

## Overview Market

- The canned fish market in the UK is currently valued at £493.8m
- It is growing at 7.9% year-on-year, having peaked at 8.2% in June 2012
- Supermarket own-label represents the largest slice of the market with a 37.6% share<sup>1</sup>
- Of the 27 fish species present in canned fish, John West offers the widest range with 23 different varieties
- John West and Princes are the biggest branded offers, with tuna representing the largest proportion of volume with 64%



# PROJECT OVERVIEW

## Description

In 1857 John West's goal was to bring back the very best fish for the world to enjoy. Today, cans of John West are found in kitchen cupboards up and down the land.

Synonymous with high quality and great taste, John West catches a variety of fishes, from Alaskan red salmon to tuna from the Indian Ocean before canning them to provide a convenient, accessible and succulent treat.

John West remains today as dedicated to bringing people uncompromising quality as its pioneering founder was in 1857.

## Project Scope

The scope of the project included strategic planning, creative ideation, concept development and design refinement, as well as developing artwork for over 100 SKUs.

## Project Launch Date

August 2011





# PROJECT OVERVIEW

## Design Solution

We knew the brand had high awareness and people's perceptions were more than favourable.

They saw the brand as one that offered good quality, tasty fish! The problem was this just wasn't enough to encourage them to pay more for John West at shelf.

So we started by looking back. In fact, we went right back to the start. The year 1857 to be exact when John West, the founder, started it all.

We delved into the man and learnt that he was an entrepreneurial pioneer. Well, you'd have to be to sell canned Alaskan salmon back to the Scottish.

Then charting the brand through the years, we also discovered that it had continued in this pioneering spirit, as is recently demonstrated with its 'No Drain' innovation.

We captured this heritage of striving to be the best and not wanting to compromise on quality in the positioning idea 'Leading the way since 1857'.

The next challenge was to translate this into a creative idea that would not only allow us to successfully express the brand's character and convey its unique story, but also communicate the species of fish, the type of cut, the carrier, as well as the price point. And all on a very small label that had to have two shelf faces.





Tier 1



Standard

Tier 2



Standard Plus

Tier 3



Premium

Firstly, we developed the new brand identity that employs a collection of beautifully crafted illustrations of all the different fish species John West provides, along with other fishing related icons, like boats and anchors. The purpose was to showcase the brand's expertise and expansive knowledge of fish and fishing.

These were then captured in a dynamic, flowing wave to convey a sense of energy and purpose. To consumers this appears to be "bursting with life" and shows that John West cares about the fish and the seas because it has "heart".

The wave surrounds the refined brand marquee, which was given more stature and authority. 'Since 1857' became an integral part of the identity, leveraging the brand's remarkable heritage, whilst offering reassurance. Finally a seagull in flight was placed above it, which to consumers signified "hope", "uplift" and "freshness".

Another aspect of the redesign was considering the range architecture to aid people's navigation at shelf and denote different price points. The range was rationalised from over 150 SKUs down to around 90 SKUs and then organised into three distinctive tiers: essentially good, better and best.

We achieved this differentiation mainly through the use of colour and, where possible, structure. Pack icons were also developed as call-outs to communicate added value propositions, such as 'No Drain' and 'Steamed' or 'Smoked', and provide reasons for paying a premium for these products.

In research the design solution was well received. Respondents saw it as being distinctive, engaging, modern, and coherent as a range, fitting with their perceptions of the brand and the idea of 'Leading the way since 1857'. They also cited that it was more likely to encourage brand commitment and engender stronger loyalty. All in all, a fantastic response for canned fish.'

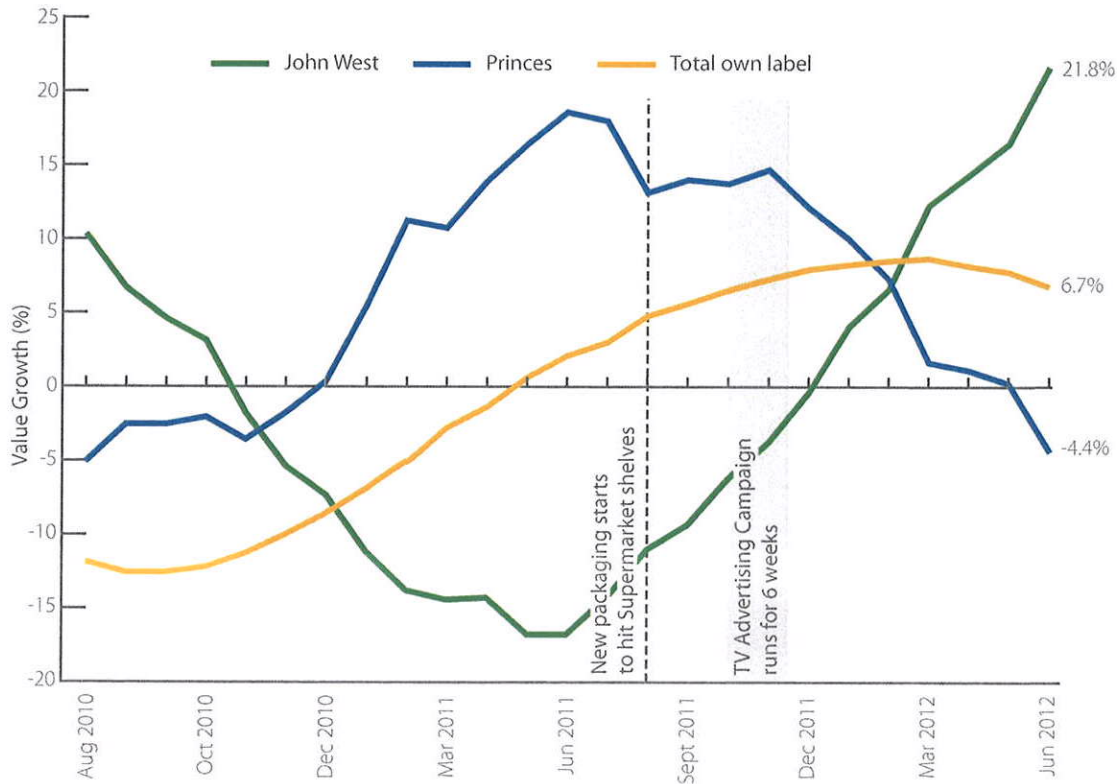


(505 words)

# SUMMARY OF RESULTS

- John West is now worth £160.5m in the UK, selling over 23,500 tonnes of canned fish<sup>1</sup>
- This equates to a staggering £28.7m increase in value year-on-year (or £16.9m if discounted for market growth of 7.9%)<sup>1</sup>
- It is now the largest canned fish brand in the UK with 32.5% value share and a 27.9% volume share
- Having been in gradual decline for over a year, losing up to 16% growth just before re-launch, John West has now achieved 21.8% value growth following the brand re-design, far outperforming Princes (-4.4%) and own-label (6.7%)
- For the first time in over a year, the brand is now in volume growth achieving an 19.1% increase, in stark contrast to both Princes (-19.5%) and own-label (-4.8%) which are both in decline<sup>1</sup>
- As a consequence of the redesign, the brand was relisted in Sainsbury's and Asda, increasing its distribution by 8.3% year-on-year in Grocery<sup>1</sup>
- In the first 4 weeks of launch, for every £1 invested in the redesign, the return on investment based on revenue was £2.93

## John West has achieved record growth, outperforming the competition



52 weekly rolling value growth by brand

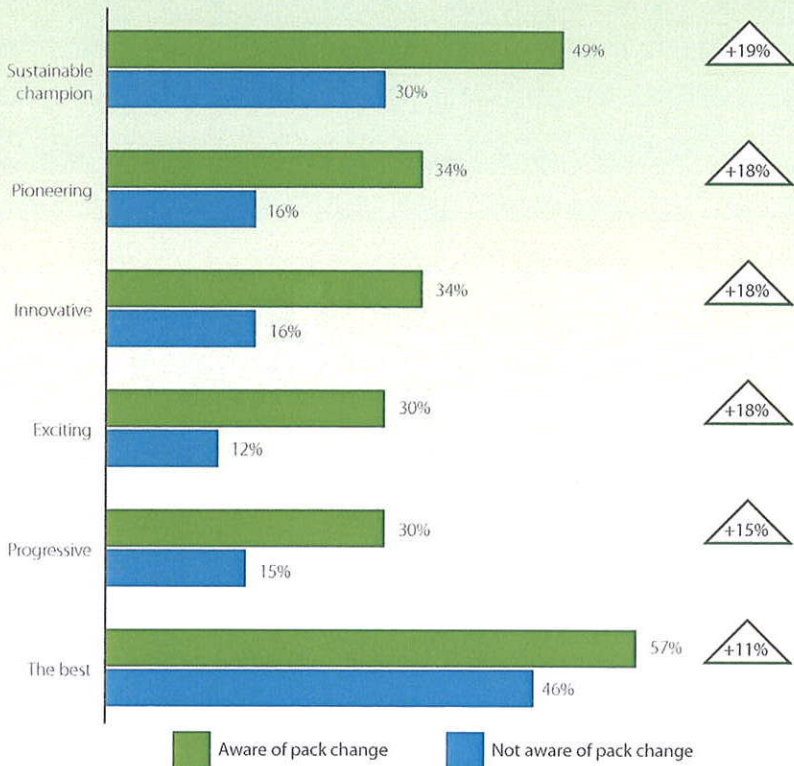


source: Symphony IRI - 9th June 2012



# SUMMARY OF RESULTS

## Impact on brand perceptions following new packaging



- John West is now the number one canned fish brand achieving a primary business objective set as part of the project<sup>1</sup>
- It was also the only major fish brand growing penetration in the 52 weeks from 46% to 48%<sup>1</sup>
- Plus of people aware of the new packaging they were more likely to perceive the brand as being a sustainable champion, pioneering, innovative, exciting, progressive and, reassuringly, the best<sup>2</sup>

source: Hall & Partners Brand Tracking Study 10th Nov 2011

## The new pack communicates desirable brand messages

What does the new packaging say to you about John West?





# OTHER INFLUENCING FACTORS

Now, we'd love to say that this resounding success was purely down to our design, but we have to admit that there have been some other factors that would have no doubt helped.

## 'The Story behind the Can' Campaign

John West ran a national ATL advertising campaign for 6-weeks from 10th October 2011 with a media spend in the region of £6m.

The campaign centred on the 'Story behind every can', where people were invited to trace the origins of their tuna using a code that was printed on the can. Because of this, the new packaging featured prominently in the campaign along with the newly created brand identity.

Also, we are delighted to note that brand growth started before the launch of advertising and are immensely proud of the continued growth achieved to date.

## Price Promotions

Another factor one should consider is price promotions and offers. However, the level of activity since launch can be considered as similar to the previous year and so can reasonably be discounted as a major influencing factor.



No Drain Range



## Distribution

As noted in the summary of results, distribution did increase in Grocery by 8.3% due to John West being relisted with two major retailers. However, the brand redesign and range rationalisation was a major factor in achieving that result.

## Research Resources

1. Hall & Partners Packaging Design Research Debrief  
21st December 2010
2. Hall & Partners Brand Tracking Study  
16th November 2011
3. Symphony IRI  
9th June 2012
4. Kantar Worldpanel  
10th June 2012

