

TWININGS

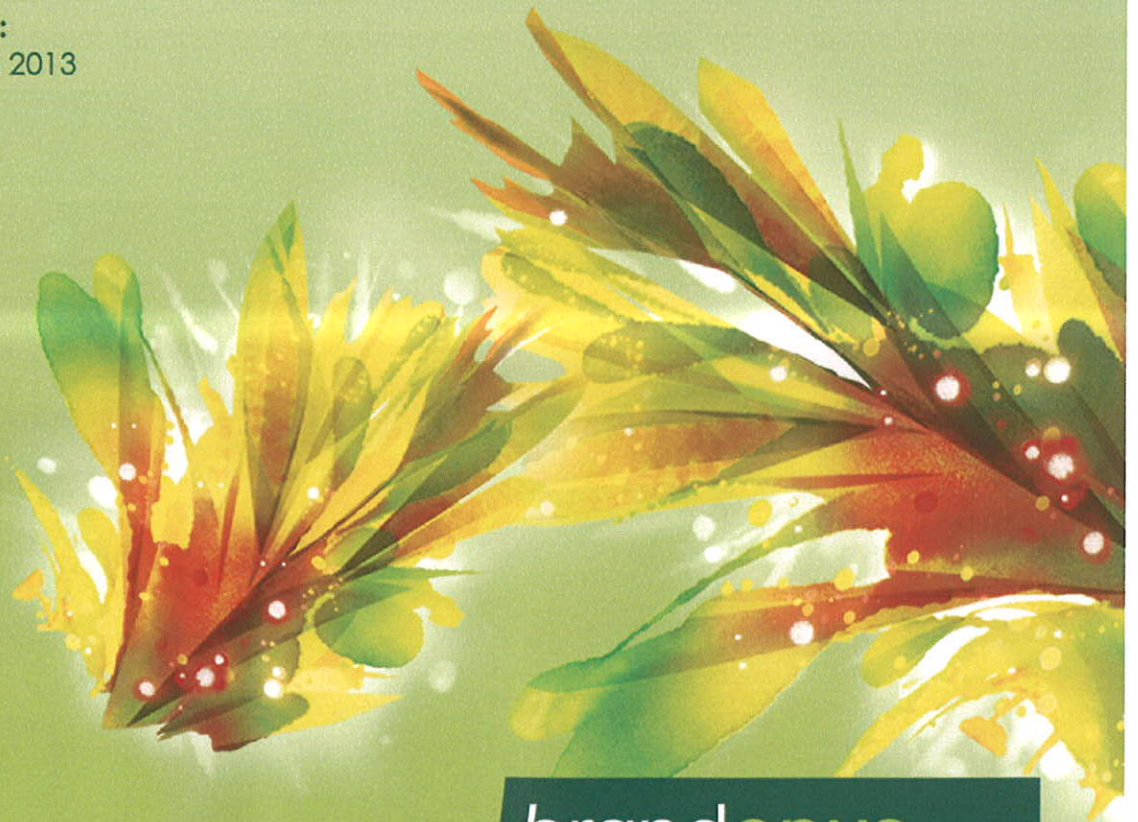
GREEN TEA

Category:
4.2 Packaging: Branded Drink

Client:
Twinings

Design Consultancy:
BrandOpus

Date:
June 2013



brandopus

“This range of striking new designs by BrandOpus brings a much needed fresh and bold new look to the entire Green Tea category. Incorporating illustrations by Tobie Giddio, each design is an individual ink drawing that expresses the unique expertise and delightful flavours that have gone into each blend. We are thrilled with the impact at fixture.”

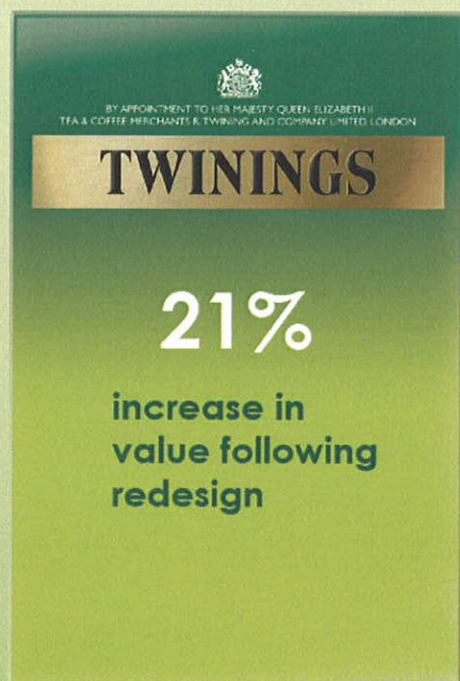
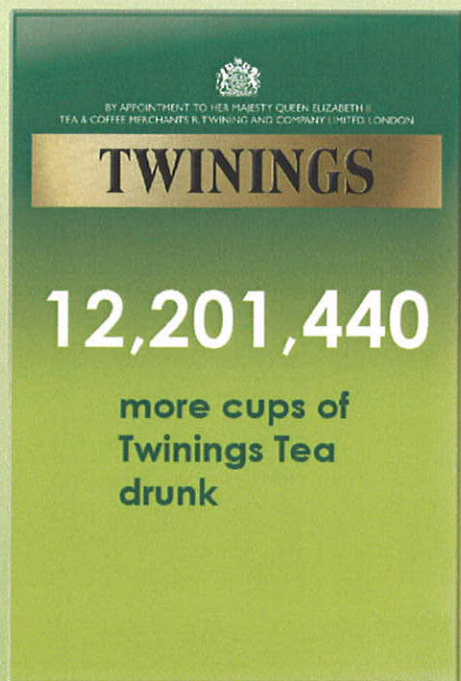
Heather Hartridge, Marketing Director, Twinings



executive summary

In the UK and internationally, Twinings is synonymous with tea, and the highest quality, great tasting blends. Better known for bringing popular favourites such as English Breakfast and Earl Grey tea to fame, Twinings is also building a reputation for innovative flavours.

Keen to encourage a whole new generation of consumers to enjoy a range of unique blends, Twinings briefed long-term design partner BrandOpus to enhance the brand's leadership position in the Green Tea category through a range of seventeen modern and more confident designs.



The BrandOpus redesign of Twinings Green Tea saw value sales rise by a phenomenal **21%** following the relaunch. Increases in sales are equivalent to **12,201,440 more cups** of Twinings Green Tea drunk following the redesign versus sales during the same period the previous year.



until return on
design investment
was achieved
based on new
product alone



overachievement
on original
forecasts



executive summary cont.

New blends causing a stir

Based on the increased sales alone, the BrandOpus design of the 7 new Twinings Green Tea variants **achieved return on investment in only 7 months** following launch. What's more, the success of the redesigned range is tracking **50% above ambitious targets** Twinings set prior to launch.

Everyone's cup of tea

Since the redesign, Twinings' average spend per trip has grown twice as fast as the rest of the category. Market penetration increases amount to **206,187 more households** buying into Twinings Green Tea.

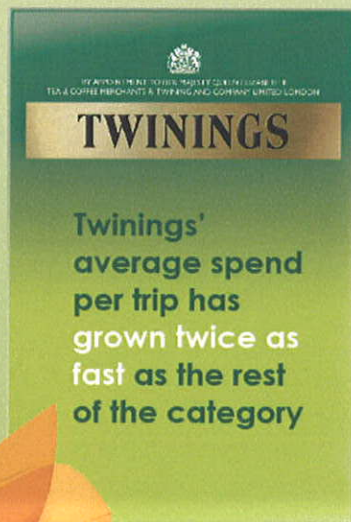
More than a storm in a tea-cup

Since relaunch, Twinings Green Tea has accounted for **39% of shopper growth** in the green tea category. Whilst market share has increased by **5.8% in the past year** since the redesign fully hit the shelves.

Word count: 269



retail sales value
generated
in new product sales



outline of project brief

Although Twinings were historically the market leader within green tea, the category was seen as an area of great opportunity for growth within the brand portfolio. However, Twinings had nothing to differentiate them from other brands offering green tea, with the previous packaging incorporating generic design features such as tea-leaf photography on pack; a device used as a standard across the entire green tea category.



previous Twinings Green tea design

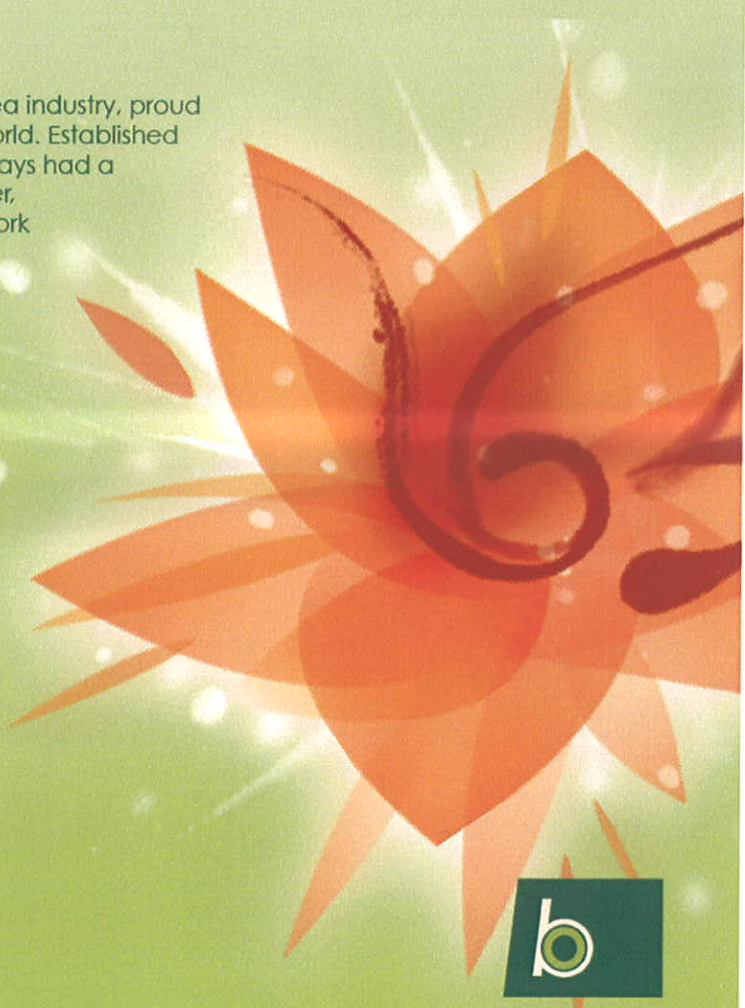
In order to entice a new demographic of consumers into the world of Green Tea, Twinings extended their range devising seven tempting new flavoured blends. Twinings then turned to long-term design partner BrandOpus to enhance the brand's leadership position in the Green Tea category, with a brief to:

- **Create a range of more confident and modern designs**
- **Open up the world of green teas to make it easier for non-drinkers to sample**
- **Encourage the loyal fan to explore the wider range**
- **Create a ranging strategy growing collection**

Description

Twinings is a figurehead of the international tea industry, proud to blend teas that are enjoyed all over the world. Established in 1706 by Thomas Twining, the brand has always had a passion for blending. More than 300 years later, Twinings still sell tea from Thomas's shop, still work hard to bring new blends to tea lovers, and are quickly growing a reputation for innovative flavours.

Green teas enjoy a dedicated consumer following who believe that there are positive health benefits associated with consumption. Teas in the Twinings Green Tea range come only from the highest quality leaves. The brand has developed delicious tasting green teas with fruit, herbs and floral notes for the consumer to enjoy on any occasion.



overview of market

At the time of brief the green tea category was worth £22.4m. Green tea has become increasingly popular over recent years as consumers have become more aware of the health benefits associated with the variant, such as protection against cell deterioration.

However, despite strong growth in value and volume terms, at +5.6% and +10.6% respectively, category penetration had remained flat at 13% with very few new buyers entering the category, owing in part to lot of duplication and all brands delivering the same offering of blends, executed in a similar, generic way. This was underlined by competitor activity in 2010, which marked the start of a game of volume share-steal across the category, rather than brands innovating to entice new consumers in. With competitors stealing share from each other, the category's long-term prospects for incremental growth were at risk.

Twinnings led the category with £8.7m sales (38.7% value share), but despite predictions of long-term growth, in the short-term Twinnings Green Tea's 8.7% volume sales growth was behind category growth at 14.8%. With a goal to stave off the competition and remain the category leader, Twinnings needed to drive growth in both the long and short-term by creating a new vision for the category, which is at risk of being 'dumbed down' and commoditized by competitors.

Full project launch date

March 2012

Size of design budget

£140,000



outline of design solution

In keeping with the rationale that BrandOpus had previously created for the range of Twinings Speciality teas, the agency stripped back the unnecessary detail to create strong, single-minded designs that feature a clear and single-minded approach to colour to establish and differentiate the range clearly in the fixture. To achieve this, the agency enlisted the help of fashion illustrator Tobie Giddio to bring her trademark distinctive ink illustrations and expertise from projects with Alexander McQueen, Tiffany & Co. and Vogue to help bring the Green Tea designs to life, and to enheighten premium cues and allow Twinings to market the range at a higher price point.

The core green teas have a clean look and feel with the typeface lending a dash of the Far East, and reflecting the origins of the tea. BrandOpus built on the core range design for the flavour blend teas, exploring ways of bringing in refreshment through a range of colours and evocative imagery to create an abstract expression of the taste and experience of the tea blends. The Twinings Green Tea designs now challenge the category trend of showing photography of the ingredients, resulting in a more evocative and artistic look and feel that is unique and stands out from the crowd.



The relaunch saw the introduction of two new green teas, crafted to be marketed at a more premium level: Pure Yunnan Province Green Tea and Pure Anhui Province Green Tea. These designs were inspired by the provenance of these special, handpicked, single origin flush teas. The mountainous Chinese regions of Anhui and Yunnan are depicted on the front of pack, whilst the background maintains the design features of the core range, making the world of green teas easier for the consumer to explore.

In light of the seven new variants joining the Twinings Green Tea range bringing the total number to an expansive 17 blends, BrandOpus created a ranging strategy to enable a clear distinction between core, flavour and specialty blends, allowing consumers to easily navigate the collection and find their chosen blend on shelf.

Word count: 342



summary of results

Increase in sales

The key objective for the redesign was to increase sales, which was achieved and surpassed with ease following the redesign.

- Value sales grew by **21%** following the redesign.
- **Volume sales grew by 3.6%** following the redesign
- Twinings' average spend per trip has grown **twice as fast** as the rest of the category since the redesign.¹
- In a category where frequency of purchase is decreasing, Twinings Green Tea is in growth.²
- Increases in sales are equivalent to **12,201,440 more cups of Twinings tea drunk** following the redesign.

NPD success

One of the objectives of the redesign was to create a ranging strategy that allowed the Green tea portfolio to grow.

- Prior to launch, Twinings set ambitious KPI's for the success of the new variants, but despite this, the range has **overachieved forecasts by 50%**.

Change in consumer behavior and perceptions

A core objective of the original brief was to open up the world of green teas to make it easier for non-drinkers to sample, and to encourage the loyal fan to explore the wider range.

- **Penetration increased by 0.7%** following the redesign.³
- It doesn't sound like a lot but is equivalent to **206,187 more households** buying into Twinings Green Tea.⁴
- Given that Twinings has driven the category growth since the redesign rather than poach consumers from other brands, this is testament that the redesign has made it easier for non-drinkers to enter the category and choose Twinings.



summary of results cont.

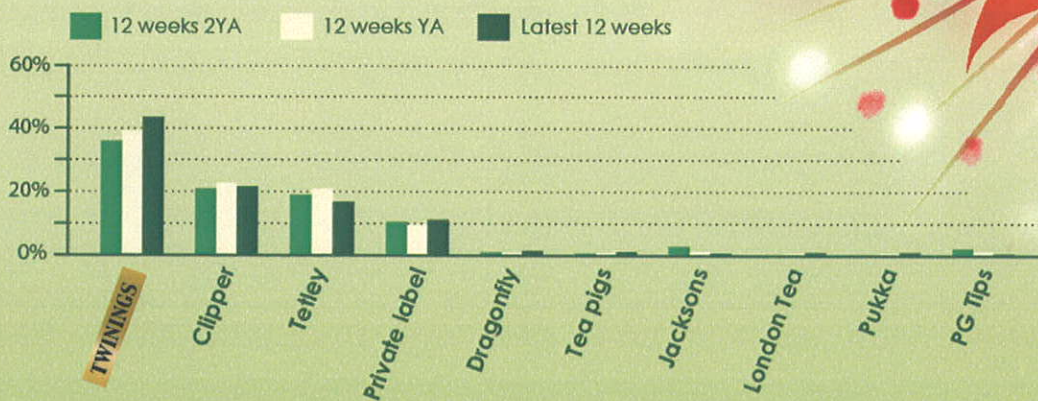
Driving category growth

- Twinings Green Tea accounted for **39% of shopper growth** in the green tea category.⁵
- The most recent data indicates that Twinings Green Tea value sales are **growing almost twice as fast** as the category.⁶

Increased market share

- Twinings Green Tea market share has **increased by 5.8%** in the past year since the redesign fully hit the shelves.⁷
- Since the redesign Twinings role as the green tea category leader is sealed, with a **43.5% value share**.⁸
- That's **over twice as much** as the nearest competitor, Clipper Tea with 21.7% share.⁹
- Twinings is the only brand in the category in **consistent growth** in 4, 12 and 52 week data, attributed to the success of the design and concept.

Twinings value share of Green Tea



Increased distribution

Following the redesign Twinings Green Tea **distribution has increased by 1%** from 70.8% to 71.8%.¹⁰

Increased listings

Twinings presence at the green tea fixture hit at an all time high immediately following the redesign, with listings increasing as retailers snap up the new design. Twinings Green Tea **facings increased** from 7 to 13 in Asda, and 10 to 14 in both Tesco and Waitrose.

Higher price point

The new ranging strategy, and the creation of a brand hierarchy has allowed tiering within the Twinings Green Tea range, including the **introduction of two new premium blends**: Yunnan and Anhui province.



Return on Investment

The project saw a huge increase in sales of Twinings Green Teas. Based on the new variant sales alone, the BrandOpus redesign of the Twinings Green Tea range achieved **return on investment in only 7 months** following launch.

With a distinctive design that sets it apart from the wider Green Tea range, both Yunnan and Anhui are retailed at £2.09, a **40 pence increase** on the Pure Green Tea blend.

Other influencing factors

Like the majority of other brands in the green tea market, Twinings did conduct some price promotion during the period following the relaunch, but not to a greater extent than prior to the redesign.

Research resources

1. 52 week data to w/e 12.05.13
2. 52 week data to w/e 12.05.13
3. 52 week data to w/e 12.05.13
4. 52 week data to w/e 12.05.13
5. 52 week data to w/e 12.05.13
6. Twinings 27 MAT % change YA,
versus category 15.2 MAT % change
YA, date to 11.05.13
7. 52 week data to w/e 12.05.13
8. Nielsen 52 week to w/e 11.05.13
9. Nielsen 52 week to w/e 11.05.13
10. Nielsen Scantrack data to 52w/e
02.03.2013



declaration

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