



BY APPOINTMENT TO HER MAJESTY QUEEN ELIZABETH II  
TEA & COFFEE MERCHANTS R. TWINING AND COMPANY LIMITED, LONDON

# TWININGS

Helping Twinings infuse the category  
with a *Sensational* new taste

**Category**

4.2: Packaging – Branded Drink

**Client Company**

Twinings

**Design Consultancy**

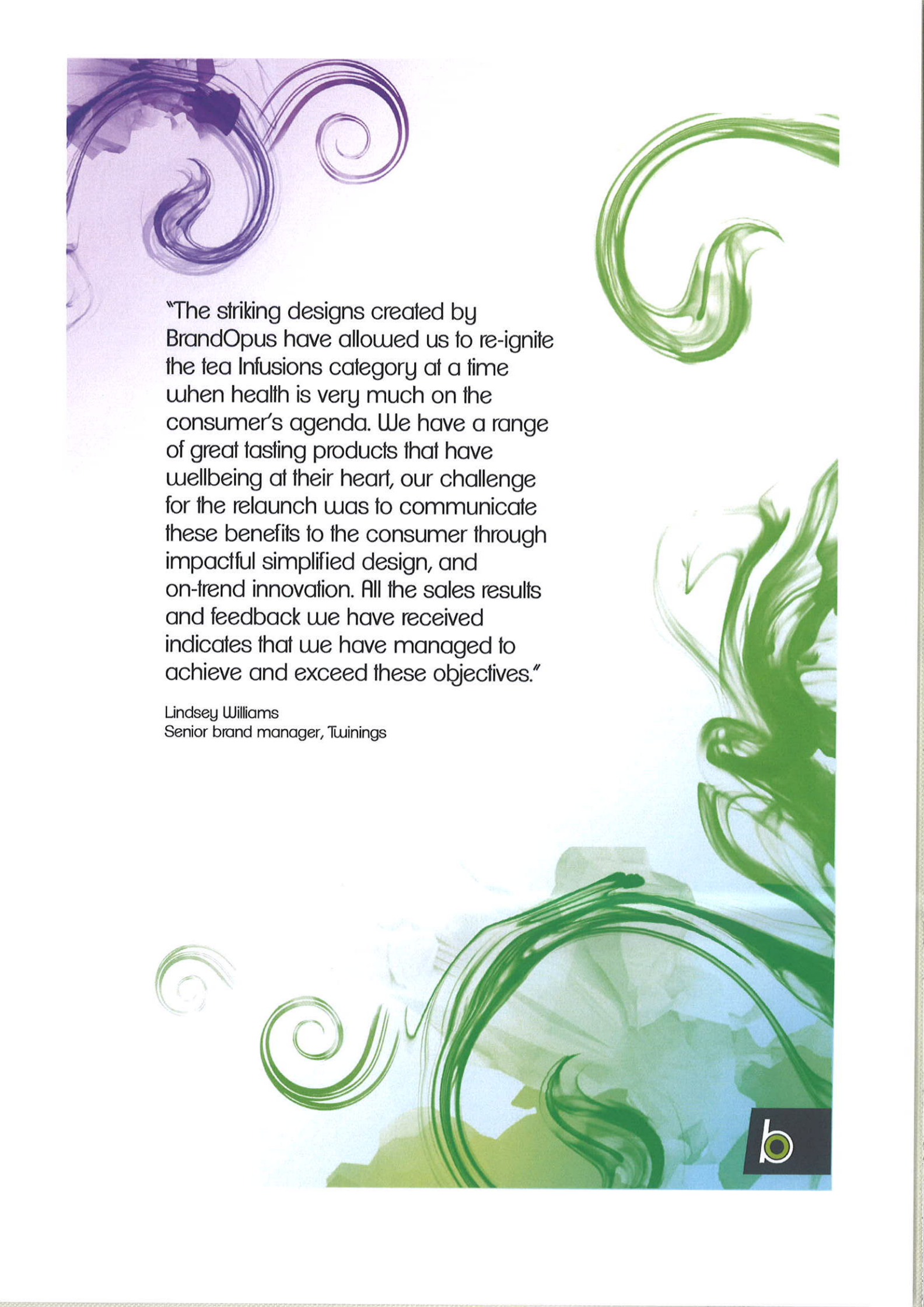
BrandOpus

**Date**

June 2013







"The striking designs created by BrandOpus have allowed us to re-ignite the tea Infusions category at a time when health is very much on the consumer's agenda. We have a range of great tasting products that have wellbeing at their heart, our challenge for the relaunch was to communicate these benefits to the consumer through impactful simplified design, and on-trend innovation. All the sales results and feedback we have received indicates that we have managed to achieve and exceed these objectives."

Lindsey Williams  
Senior brand manager, Twinings





## Executive Summary

Twinings had a wide portfolio of great tasting Infusion blends with wellbeing at their heart, but the range was large, confusing and felt to recede on shelf. It was identified that design could help to clarify the different ranges and encourage purchase. BrandOpus were tasked with the challenge of restructuring the Infusion portfolio, and communicating the benefits of each range to the consumer through impactful simplified design.

BrandOpus worked closely with Twinings to transform the fragmented Infusions portfolio with a simple strategy that is easy to navigate on shelf and striking designs that draw the consumer in. The relaunch has allowed Twinings to re-ignite interest in infusion blends and drive overall category growth, at a time when health is very much on the consumer's agenda.

### Blending a success story

The range has seen a **22% increase in value sales** and tellingly both **Value and Volume sales growth** at the same time, indicating that the concept and design has allowed the brand to achieve a premium perception without alienating the consumer with an inaccessible price point.



**Value  
& Volume  
growth**

**22%**

increase in value sales





## Executive Summary Cont.

### Sensational sip

Fruit and Herbal Infusions NPD has generated **£747,900 value sales** in only 22 weeks since launch. This is an entirely new income stream generated, and not sales poached from the rest of the Infusions portfolio. The NPD within the range is delivering incredibly strong sales, reaching **£1.4m retail sales value** and **exceeding annual forecasts within 8 months**.

Sensations delivered

# £1.4 million

retail sales value

# £747,900

value sales from NPD alone

Sensations sales have exceeded annual forecasts within

# 8 months

### Infusing the category with flavour

Category penetration has **grown by 2 ppts to 22.9% MAT** following the Infusions redesign. This equivalent to **528,000 new households** buying into Infusions. Twinings has generated **60% of category growth** in the last year, transforming the fortunes of a **previously declining category**.

# 528,000

new households buying into Infusions

# 60%

of category growth accountable to Twinings

Penetration now at

# 22.9%





# Project Overview

## Description

The Twinings Infusions portfolio is broad. It needs to appeal to and serve many different types of consumers. However, over time, this large range of over 40 products had become overwhelming: the use of colour and naming at a sub-range level was confusing the consumer, and there was a clear need to create visual differences at range level.



## Project Overview Cont.

### Outline of Project Brief

In order to maintain and grow their leadership of the Infusion category, Twinings identified the following goals for the Infusions relaunch:

- To increase frequency of purchase to make Infusions a 'must drink' everyday for health-conscious women.
- To attract new consumers and grow the category.
- To take back leadership of the fixture, get noticed and simplify navigation to aid purchase.
- To define the Herbal and Fruit ranges and create a more premium experience.
- Streamline the portfolio by scrapping 10 blends.
- To create excitement through innovative new flavours.

It was identified that design could help Twinings to achieve these goals therefore they tasked long term design partner BrandOpus to simplify and redefine the Infusions portfolio to ease navigation, whilst creating a distinctive and unique look and feel.

### Specifically the brief was to:

- To explore how to visually segment the Infusions portfolio to reduce complexity.
- To consider the relationship between the different propositions within the range and their relationship in the context of the wider portfolio.
- Create a more premium experience through the design.
- Generate excitement around a selection of innovative new blends to be introduced to the range at the time of relaunch.





## Project Overview Cont.

### Overview of Market

The fast-growing fruit and herbal tea category was worth £44m at the time of the brief, with a value growth rate of -5%.<sup>1</sup> Twinings was the lead player in the Infusions category with 63% value share, followed by own label 15%, Pukka 8%, Lipton 5% and Clipper 3%. But the market had seen very little innovation or excitement in recent years, and as a consequence category penetration was flat.

With consumers ever price-conscious, understandably private label also posed a significant threat, Waitrose, Sainsbury and Tesco had all recently relaunched their Infusion ranges with new packaging and a more premium proposition.

There were shared concerns for all players within the Infusions category, including: generating innovation to steal back market share from competitors; generating consumer reappraisal of Infusions; and drawing in new consumers from other categories.

In addition, usage and attitude segmentation clearly indicated that Infusion blends meet quite different needs and often appeal to very different groups of consumers, and all competitors were concerned with addressing this through design and packaging.

### Project Launch Date

November 2012

### Size of Design Budget

£172,393





## Project Overview Cont.

### Outline of Design Solution

BrandOpus recognised the need to simplify and unify the portfolio, and yet still create visual differences at range level. The agency introduced a clean, white background across all four sub-ranges within the Infusions portfolio. Each blend also features swirling imagery to reflect the moment that the tea infuses into hot water.

**"Fruit Infusions are all about taste"**



But aside from these common features, the blend's character and benefit becomes the defining attribute in the design, creating three naturally differentiated ranges.

Fruit Infusions now feature a confident, colourful and juicy presentation that combines bold typography, real imagery and illustrative touches to depict the fruity flavour hit you can expect from each sip.





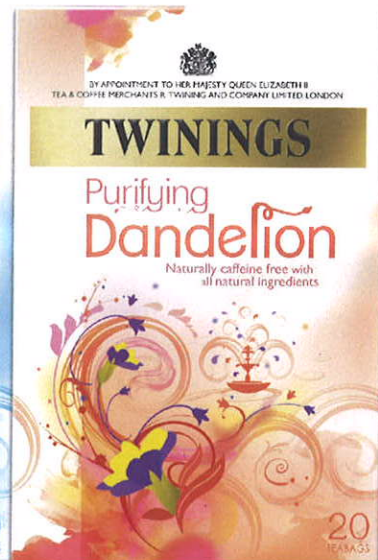
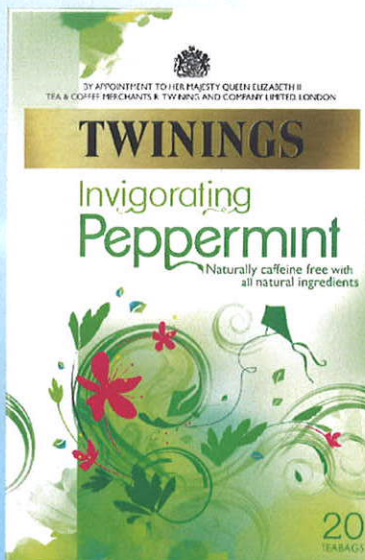
## Project Overview Cont.

### Outline of Design Solution cont.

Herbal Infusions use illustrative elements and accents of colour to signify the unique health benefit of each flavourful blend. Despite the many different personalities and flavours in the range, crucially the design has been engineered to tessellate when merchandised at the fixture, bringing creativity to the portfolio.

The new design aims to take the consumer to a fantasy world, in which they feel the benefit of the blend.

**"Herbal Infusions are all about benefit"**





## Project Overview Cont.

### Outline of Design Solution cont.

As part of the refresh Twinings launched a taste Sensation range, based on consumers favourite blends with an extra intensity and featuring interesting ingredients.

Each variant has been developed by expert master-blenders to ensure that the depth of flavour matches the aromatic scent; combating the misconception that infused teas do not deliver on taste. BrandOpus communicated the distinctiveness of this special range through the pack designs, which feature an intricate quilling technique reflecting both the infusion process and sensational tasting notes of the teas.

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Across the entire portfolio colour schemes compliment, allowing the consumer to easily identify a favourite ingredient irrespective of which sub-range each blend belongs to. All packs in the portfolio also feature block colouring on the side of pack, so that the blends are just as recognisable on the shelf at the supermarket as in the tea cupboard at home.

**\*The taste Sensation range is all about sensational flavour**

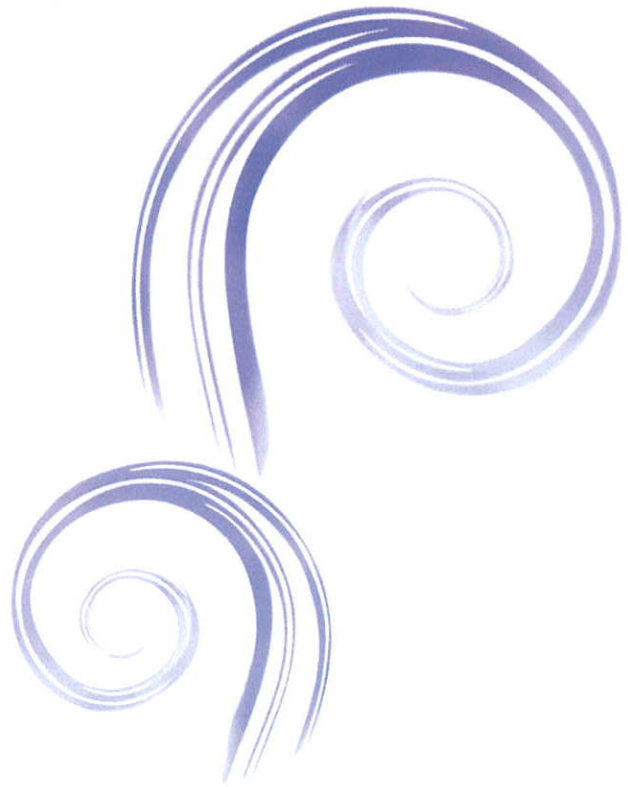




## Results

### Increase in sales

- Twinings Infusions' value sales have **grown by 22%** in 12 week sales data.<sup>2</sup>
- Impressively, the Twinings Infusion range is in **both Value and Volume sales growth** at the same time, indicating the concept and design has allowed the brand to achieve a premium perception without alienating the consumer with an inaccessible price point.
- Twinings Infusions has **grown by 14.1% MAT** in volume sales<sup>3</sup>
- The redesign allowed Twinings to launch NPD within the Infusions portfolio **without risk of cannibalising other blends.**
- NPD within the Infusions range is delivering strong sales – it has **delivered £1.4m net sales value** to the business after only 8 periods into the year. As a benchmark, the forecast for NPD sales across the full year (13 periods) was £1.5m!<sup>5</sup>
- Two of the NPD blends: Liquorice and Ginger are now **3rd & 4th best sellers** in the whole Twinings Infusions portfolio proving that design, innovation and expertise in blending is essential to the brand's success in the overall tea category.
- Double Mint taste Sensation, with its intricate quilling design, has grown from non-existence to an average **rate of sale of 1439 units per week** within 5 months, in Waitrose stores alone.
- That is the equivalent of 32,665 boxes sold within 22 weeks, or **653,300 cups** of relaxing Double Mint taste Sensation blend enjoyed by Waitrose consumers in only 5 months.





## Results cont.

### Changes in consumer attitudes & behaviour

And the story doesn't end at the supermarket checkout; The intricate designs featured in the Infusions range have really **inspired customers to integrate with Twinings' Facebook page**, posting their own images and happy comments about the range.



From...

'aloof', 'fusty', 'posh',  
'worthy' feel of  
packs...'conference teas'.



To...



"Current packaging says tea with slight hint of flavour.  
**With new ones I think more of the flavour...**'it all looks more **contemporary and wholesome** with the white than one solid colour."

"These look like they will **taste as good as they smell**"



"It's more interesting...you can look at [current] nettle and peppermint but it wouldn't show me how it's cleansing me. The new one, it's showing you, **giving you an impression**"





## Results cont.

### Increase in penetration

- Category **penetration has grown by 2 ppts to 22.9% MAT<sup>6</sup>** following the Infusions redesign.
- This equivalent to **528,000 new households** buying into Infusions following the redesign, indicative of a huge consumer reappraisal and invigoration of what was a declining category.

### Growing the category

- The Infusions redesign has not only transformed Twinings fortunes within the category, but has **created a step change in the category itself.**
- What was a declining category has grown by £7m in the last year. Twinings has **generated 60% of this growth**, with a total contribution of £4.2m.

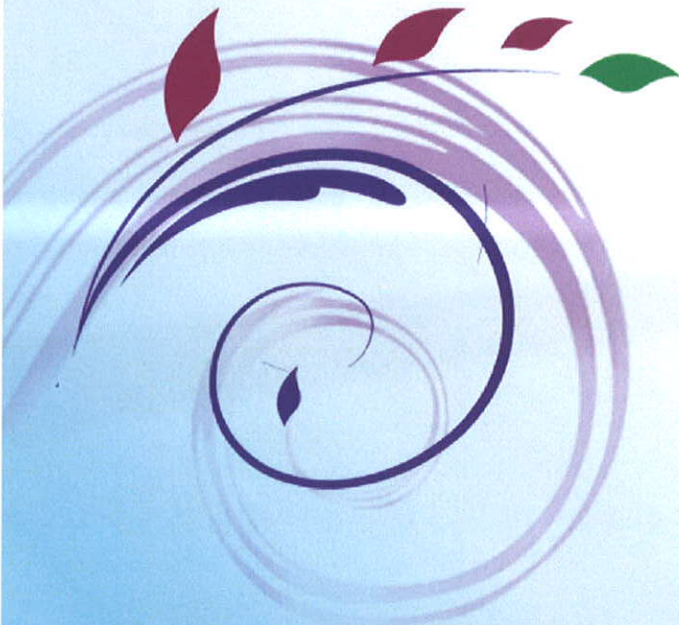
### Increases in Market Distribution

- The redesign has allowed Twinings to achieve significant new business wins with the Infusions range. **Distribution points for Infusions have increased by 17%** in the last fiscal year, reaching 92,246 with only 2/3 of the fiscal year lapsed.

- NPD has achieved **23,399 distribution points** of this total.
- The redesign has allowed Twinings to introduce some of the variants into other markets – around 10 Infusions core products are currently **on sale in New Zealand, with more news to follow!**

### Design enabling a new premium price range

- The concept and **design allowed Twinings to introduce a new premium range** of taste Sensation blends, with a higher RRP of £2.29 versus the core range at £1.29.
- This **constitutes a 56% increase in price point<sup>7</sup>** due to concept and design, as well as blend and format.



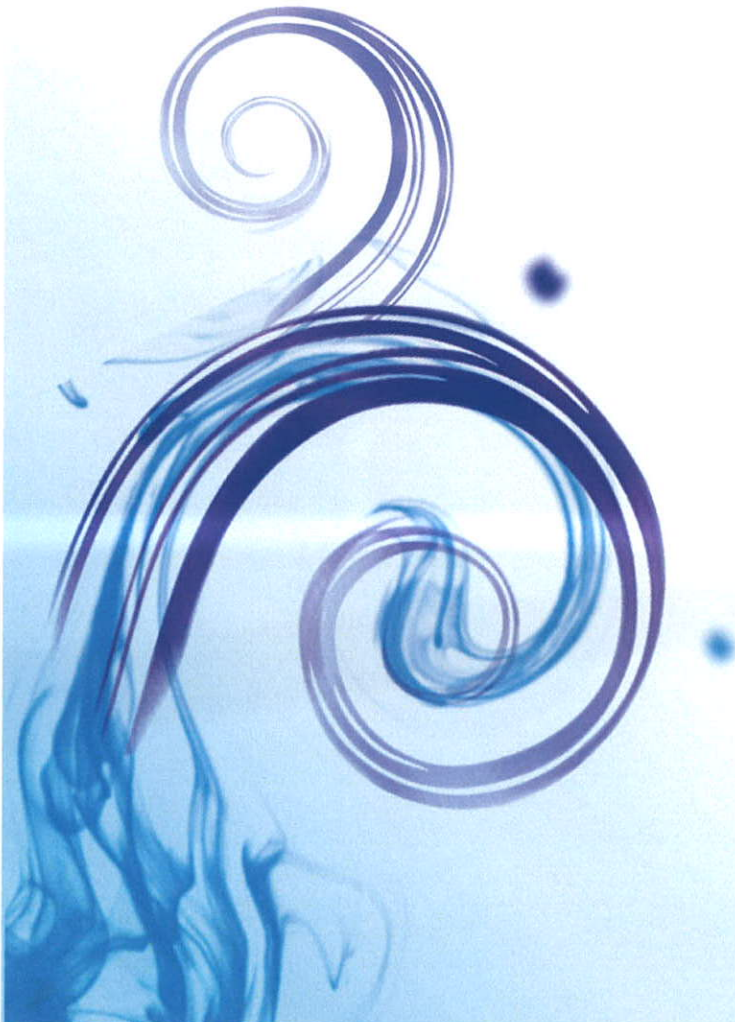


## Research resources

01. Nielsen week 52 ending 11.05.12
02. Nielsen Scantrack w/e 16.03.2013
03. Nielsen Scantrack w/e 16.03.2013
04. Kantar Worldpanel w/e 13.05.2013
05. Twinings NSV (net sales values) between fiscal years 11/12 and 12/13
06. Kantar Worldpanel w/e 13.05.2013
07. Neilson Data 12 week ending 06.04.13

## Other influencing factors

Twinings conducted some price promotion during the period following the relaunch, but in line with the majority of other brands in the market and the previous year.





# Declaration

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