

## THE SCENT OF SUCCESS

SUBMISSION TITLE  
Bolsius Aromatic

CATEGORY  
4 Packaging

SUB-CATEGORY  
4.3 Branded – other

CLIENT COMPANY  
Bolsius

DESIGN CONSULTANCY  
Design Bridge

CURRENT DATE  
June 2014

**DesignBridge**





This is the story of a 140-year-old Dutch family-owned company with an ambition to grow not just their own business, but the entire category.

Their success and commercial results demonstrate that great design, combined with a strong product story and a powerful consumer insight, can indeed trump glossy ad campaigns and global trade relationships.



## STEPPING INTO THE LIGHT

Bolsius, a candle company since inception, traditionally funnelled all their money into product development, leaving design and marketing as an afterthought managed internally. As global giants like P&G and SC Johnson moved into the mass-market home fragrance sector, Bolsius saw their market share plateau in a notoriously slow growth category. In response, they made a bold decision to reposition their 140-year-old-brand for the future, partnering with an agency to manage their design and marketing for the first time ever. The first step included a repositioning and complete redesign of their 'Aromatics' range, the cornerstone of their portfolio, and a halo for their value offers.



## SCENT OF SUCCESS

This successful re-brand spurred the company to market leadership in their sector (doubling their share in the Netherlands food retail market in three years). On the way they enlarged the entire scope of the category and have grown faster than their competitors - traditional small candle manufacturers as well as large multinational companies. Driven by design, largely through packaging and POS material, the growth has supported global expansion, sparking the company to upgrade their manufacturing footprint to keep up with demand.

x 2

DOUBLING THEIR  
SHARE OF THE  
NETHERLANDS FOOD  
RETAIL MARKET  
(over the 3 years since launch)







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“We’ve outgrown any significant branded competitor in the scented candle market. The new mouth-watering pack design really boosts the pick-me-up factor in-store, and showcases the true scents that we needed to capture in order to truly lift our consumers’ moods.”  
– Carlo de Nijs, Marketing Manager, Bolsius

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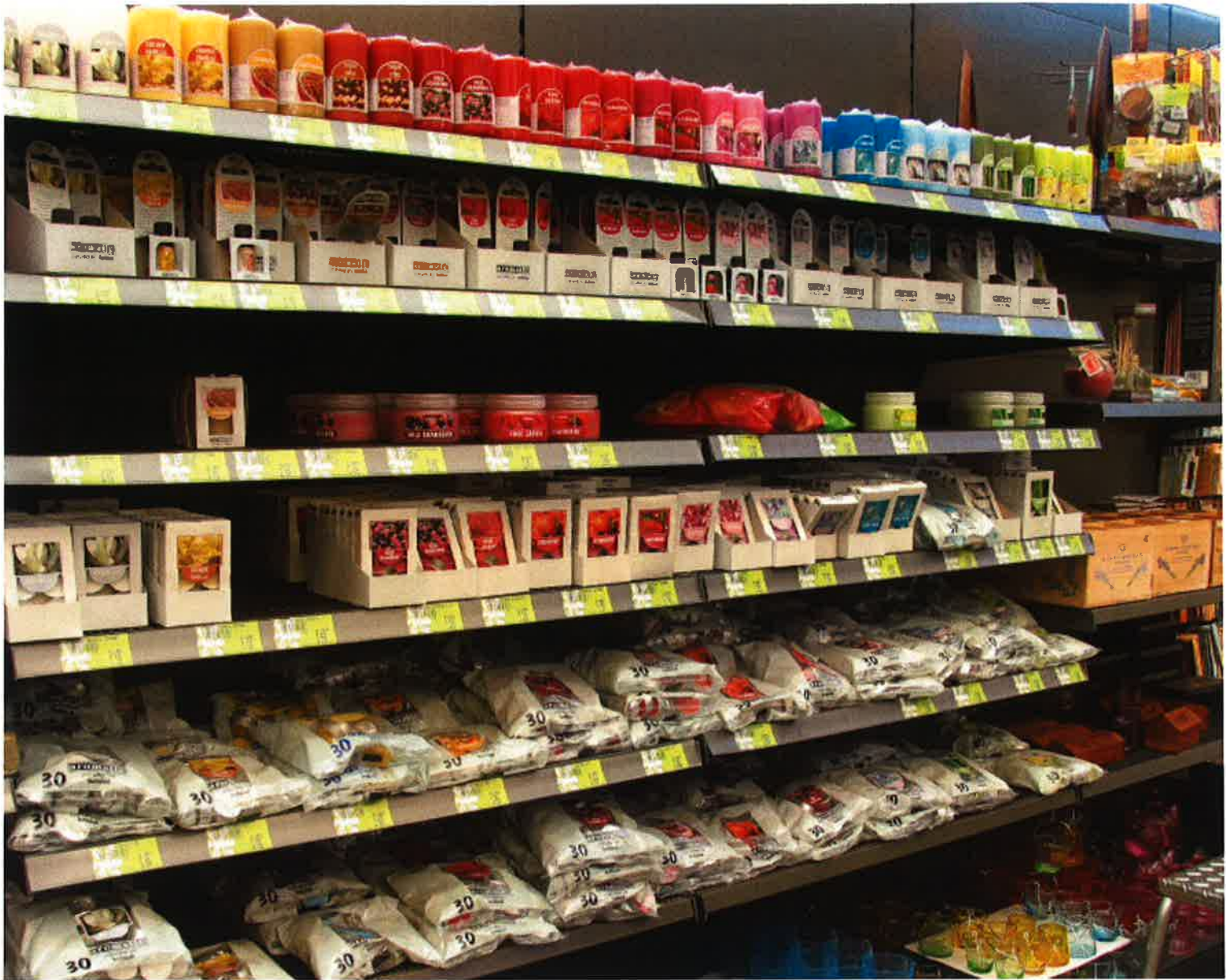
## DESIGNED TO WIN

Finally, it cemented new relationships with trade, initiated several own label conversations, and even shifted the mentality of their company from a product-focused business to one that marries superior quality with amazing design; in their words ‘Design to Win’.

OVER THE THREE  
YEARS FOLLOWING  
THE RE-LAUNCH  
TOTAL SALES

NEARLY  
TREBLED





To overhaul the Bolsius portfolio, starting with the top-selling Aromatic candle range, and reposition the brand to connect with consumers while bringing better design to the masses.



The competition in the industry



## OUTLINE OF THE PROJECT BRIEF

### Shake up the category and sow the seeds for future growth

- **Create growth in the category** by driving reappraisal of scented candles across consumers segments
- **Grow market share** in Netherlands in a highly competitive, low-engagement segment of the mass-market home fragrances category in the market
- **Create a platform for international expansion** and the credibility to stretch beyond traditional distribution channels
- Establish the role of design as a **key marketing pillar**, driving internal change for growth by shifting focus within the business from product to brand

### Stand for something truly unique and ownable

- Identify and bring to life a **new competitive positioning** for the range, leveraging the company's '**no compromise on quality**' mentality, and continued commitment and leadership in natural wax and fragrances, building on the consistent performance of the colourful and popular Colour your Home range
- Create an identity and design framework that had **appeal across Europe**, and could flex to suit different formats, household needs and uses – taking into account the many varied uses of scents and candle formats across Europe



Working to perfect true and natural fragrances for the range of Aromatic candles



A Bolsius favourite – The 'Colour your Home' range has a spectacular spectrum of colour to suit and strong presence on shelf that is easy to spot

The previous Aromatic range design reflected functional aroma and was difficult to navigate on a cluttered shelf



### Stand out where it counts

- Bring a **high design aesthetic** to mass-market home goods whilst staying true to the mid-range price point (not value; not premium)
- Develop **consistency** across the many fragrances in the range, whilst considering how it could adapt to suit a diverse selection of formats within each scent

## DESCRIPTION

A family-owned business with 1400 employees, looking to reposition their 140-year-old-brand for the future amidst increasing expansion of multi-national companies into mass-market home fragrances.

A specialist in candles since its inception, the company has remained true to this expertise and used innovation and quality to grow from its humble beginnings in the Netherlands to over 30 countries in Europe and across the world.

This project marked a significant milestone for the company, as it was the first time they had opened their doors and worked with an external agency on their design and marketing, sparking a shift from their traditional 'product first' mentality to one that places equal importance on design and brand.

## OVERVIEW OF THE MARKET

With distribution of mass-market home fragrances concentrated in food retail, players in this market are consistently battling for presence in large trade environments, where home fragrance is likely to be low on the shopping list.

The growing success of multi-nationals with wide product portfolios and strong relationships in the food trade has made it increasingly difficult for smaller, specialist businesses to compete at initial sell-in and point of purchase. Gaining new distribution contracts and market share is now an even bigger challenge than before.

Beyond food retail, the sector stretches across a highly varied mixture of trade partners, including DIY shops, drug stores, garden centres, cash and carry, department stores, furniture stores and hypermarkets. The identity must be compelling enough to stand out in each of these contexts, internationally - and the proposition must resonate with the many varied cultural profiles across Europe.

## PROJECT LAUNCH DATE

**2011** SECOND HALF OF 2011, STARTING IN THE NETHERLANDS BEFORE ROLLING OUT ACROSS EUROPE

## SIZE OF DESIGN BUDGET

**£250k**  
TOTAL BUDGET



DEVELOPMENT OF THE IDENTITY (INCLUDING PHOTOGRAPHY)    ARTWORK & ROLLOUT ACROSS THE PRODUCT PORTFOLIO





# TRUE SCENTS, TRUE MOODS

The shift in position and big brand idea helped to take the Bolsius Aromatics range from functional aroma to an emotive 'mood' positioning.

### Lighting emotions

With Glade, Air Wick and Ambi Pur focusing on smell and masking or eliminating household odours, we identified the opportunity to shift the Bolsius Aromatics range from functional aroma to a more emotive 'mood' positioning – taking the many different cultural uses of scent and format out of the equation.



### Creating warmth and connection

This fundamental shift allowed the brand to tap into more contemporary lifestyle cues, answering a key challenge in the brief. The resulting positioning 'True scents, true moods' resonated strongly with the 30 – 55 year old female target looking for simple, natural solutions that would add warmth and a relaxed ambiance to their home. And what's more, it transcended cultural boundaries.

25 FRAGRANCES  
× 18 FORMATS  
450 SKUS



### Lifting spirits

The resulting design solution blended distinct lifestyle photography suited to any home interiors magazine, with a simple pack hierarchy capable of flexing across 25 fragrances and 18 different formats - an incredible 450 SKUs. Daytime lighting and a clean, simple home context helped to drive the desired feelings of purity and relaxation, whilst also creating quality cues that clearly differentiated the Bolsius portfolio from more mass-market brands on offer.

### Illuminating the way

In spite of the shift from aroma to mood, the new identity would still need to help consumers clearly navigate the range of natural scents on offer in the portfolio. Using the new style of photography to hero the natural source of the scent (lavender, blueberries, etc.) in a tranquil home setting tackled this challenge head on.

### Elevating design in the mass-market

At the same time, it drew upon cues from more premium brands in the home fragrance and homeopathic cosmetics sectors, driving superior quality cues and improved value for money. In the context of the retail environment, the values of the consumer, and the strength of competition, this gave the family brand a strong competitive edge against the giants of the category.



Bolsius has the fastest growing market share across Europe versus all competition, and expects this to continue year on year.



x 2

DOUBLING THEIR SHARE OF THE NETHERLANDS FOOD RETAIL MARKET (over the 3 years since launch)



30 / 14

OVER 30 MARKETS IN EUROPE - 14 OF WHICH HAVE OPENED UP SINCE THE LAUNCH OF THE NEW DESIGN IN 2011



### INCREASE IN SALES

The new identity was a storming success, with turnover in Europe achieving **double-digit growth** each year for the three years since launch. This growth was driven by an unprecedented **>50% increase in the first year** of the re-launch.

## NEARLY TREBLING SALES BY 2013

With such strong growth, the company **upgraded their factory** to keep up with the demand, extending it and adding new production lines.

### INCREASE IN MARKET SHARE

In its home market (Netherlands—one of the first and toughest battle grounds), the brand carved out a massive share increase over the three years following launch, **nearly doubling market share** in food retail. Given the challenges of the trading environment and the strength of global home fragrance giants, this signalled a strong emotional win for the newly energised brand.

Across Europe, the company has the **fastest growing market share** versus all competition, and expects this to continue year on year.





### INCREASED DISTRIBUTION

The company now boasts a global footprint, with 30 markets in Europe. **14 new markets** have opened up since the launch of the new design in 2011: Germany, Denmark, Sweden, Finland, Poland, Russia, Italy, Switzerland, Ireland, Spain, Czech Republic, Canada, Austria and the UK.

In Germany, Russia, Finland, and Denmark **many market leading retailers** will carry the Bolsius range, and the new, more emotive, positioning has given Bolsius to a range of **new distribution channels** beyond the traditional food and drugs, including homewares and decoration (among other).

The re-launch has also sparked a number of **own-label opportunities**, with Dutch retailer Ahold switching their entire private label range to Bolsius Aromatic this year.

### IMPROVEMENTS IN STAFF MORALE

From the success of this rebrand, the business now champions a '**Design to Win**' mentality, recognising the power of creativity, and its ability to connect with consumers through packaging.

The whole company has been galvanised and inspired by the single, clear vision. Reflecting the **business-wide shift** from a product focus to a brand focus, senior management, marketing, and sales have all since been trained on the importance of design, and the role it should play in conversations with the trade.

With 30 markets in Europe 14 new markets have opened up since the launch of the new design in 2011:

- Austria
- Canada
- Czech Republic
- Denmark
- Finland
- Germany
- Ireland
- Italy
- Poland
- Russia
- Spain
- Sweden
- Switzerland
- UK





### Minimal above-the-line support

The only market where the company has above the line support is the Netherlands; a small campaign (less than €1m) was launched in 2011 to mark the re-launch of this brand. As demonstrated, the success reaches far beyond the Netherlands, with packaging playing the lead role in the marketing mix and engagement with the trade.



### Limited impact of above-the-line in the category

It's a category that traditionally enjoys limited emotional engagement. Shortly following the launch of the Aromatics range, a leading competitor ran a £10million advertising campaign in the UK, which only returned 6.9% growth in sales, yielding £7.27m in increased revenue – a net loss of £2.73m. (Source: The Grocer, 2nd August 2012).

Compared with Bolsius' 161% sales growth over three years, it demonstrates the critical role that design plays in the category, driving Europe-wide growth for both the brand and for the category in a way that the traditional might of ATL advertising would never have been able to achieve.



In a category that has traditionally overlooked emotional engagement, we've changed the game, building on our strengths to bring true scents, true moods and great design to the masses.

## RESEARCH SOURCES

Client Sales Data – factory Bolsius  
Market share data Nielsen NL,  
Fragranced Candles MAT'09–MAT '13  
The Grocer, 2nd August 2012

