



elmwood

# Andrex Washlets

*Cleaning up with a bum product*

Category  
4 Packaging

Sub Category  
4.3 Branded – other

Client  
Kimberly-Clark

Design Consultancy  
Elmwood

Date  
June 2012



## 2. Executive summary

*Andrex Washlets*



*After: Andrex Washlets*

# 20 years

on shelf and the product had failed to make a significant impression on the UK market

### **20 years on shelf, with little appeal to consumers**

For generations, people have been using toilet roll. It's perhaps the most fundamental of all daily routines, so why change?

Kimberly-Clark launched *Andrex Fresh* moist toilet tissue in 1992. Despite 20 years on the shelves, the product had failed to make a significant impression on the UK market. Penetration was low – at around 14% in the UK – and the product itself was a big taboo for consumers.

In fact, without a meaningful consumer proposition, nobody thought that *Andrex Fresh* was the right product for them. 'Fresh' was a dated name, with negative associations of air fresheners and cleaning products. It wasn't an aspirational state, and neither was moistness – but clean was.



*Before: Andrex Fresh*

## 2. Executive summary continued

Andrex Washlets

# 97%

of consumers agree using  
*Andrex Washlets* regularly  
will help you feel cleaner

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increase in UK sales  
(volume) in Q1 2012

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### So how do you persuade people there can be a new standard in clean?

By changing their mindset that dry toilet roll is sufficient, taking the moist category from 'problem solving' to everyday. **97%** of consumers now agree that using *Andrex Washlets* regularly will help you feel cleaner with a **+33%** increase in repeat purchases.

And creating a pack design that consumers will be proud to display in their bathrooms. 95% of Facebook respondents said *Andrex Washlets* took pride of place in their bathroom.

This in turn has resulted in a **+51%** increase in UK volume sales in Q1 2012 and **+27%** sales increase across Europe, against a target of 12%. *Andrex* gained 712,000 new customers in the first 10 weeks of the year (against a target for the whole of 2012 of 750,000 customers), and has achieved an all-time high revenue in 2011, as well as retaining **No.1** non-food brand status, according to The Grocer.

'After 20 years we have transformed our moist business... it's already generating financial returns beyond expectation.'

Jon White,  
Marketing Director  
*Kimberly-Clark*

## 3. Project overview

Andrex Washlets

# 20 years

on shelf and the product had failed to make a significant impression on the UK market



Before: Hakle packaging in Germany



After: Hakle packaging in Germany

### Outline of brief

To update and reposition *Andrex Fresh* moist toilet tissue wipes packaging and visual identity across eight countries, starting with the UK. Our objectives:

1. Build on the successful redesign of *Andrex* mainline dry toilet tissue.
2. Double the size of the European moist business within five years.
3. Change consumers' mindset that dry toilet roll is sufficient.
4. Redefine and reposition the product, taking the category from 'problem solving' and 'not for me' to normal, everyday.
5. Modernise the brand and make it relevant and appealing to new consumers, so people are proud to display it in their bathrooms.
6. Ensure ease of navigation.

### Description

*Kimberly-Clark* launched *Andrex Fresh* moist toilet tissue in 1992. Despite 20 years on the shelves, the product had failed to make a significant impression on the UK market. Penetration was low and it had failed to change consumer toileting behaviour – despite several design iterations. 20 years later and *Kimberly-Clark* have re-presented and repositioned moist toilet tissue in both tub and refill pack formats, available in all major supermarkets.

### Overview of market

#### Awakening an unresponsive market

*Andrex* faced some challenging toilet taboos. Since its launch in 1992, *Andrex Fresh* moist toilet tissue had been on the shelves for over 20 years, with sales at a consistently low level. The UK moist toilet tissue category was worth £23.8m (MAT) and *Andrex's* market share was 52.7%. Penetration in the UK was low – at around 14% – with *Andrex* accounting for half this figure. Penetration in more mature European markets was higher (41% in Switzerland and 30% in Germany, for example (MAT 2012 data to end March 2012 Nielsen), however there was still plenty of room for improvement.

To give these figures more context, over the same period, dry toilet tissue's penetration reached 96% – a huge disparity, implying that while dry toilet tissue was seen as a necessity, moist toilet tissue wasn't seen as relevant to the vast majority of consumers. *Andrex's* main competitors in the UK are own brand, plus some smaller brands like *Tempo* and *Velvet*, and *Edet* in Europe – leaving the market open for a quality, branded alternative.

## 3. Project overview continued

*Andrex Washlets*

### **Changing consumer mindsets**

Extensive focus group research showed that most people are happy using dry toilet roll. It's an accepted, fundamental routine that leaves people feeling suitably clean – so why would they need a different product, unless they had some kind of problem? The overriding consumer attitude towards moist toilet tissue in the UK was “it's not for me”. There were also other associations to contend with, such as baby wipes, bathroom cleaning and clogged plumbing, as most wipes can't be flushed.

### **Achieving shelf stand-out**

In addition to consumers' doubts about the product itself, *Andrex's* existing Fresh packaging wasn't standing out on the shelves. Consumers weren't noticing the product in-store, yet it over-indexed online by 400% (dunnhumby 2010) – suggesting that the primary pack and shelf ready packaging were key to achieving stand-out, in particular at point of sale.

## Project launch date

July 2011 (UK)

August/September 2011 (Europe)

## Size of design budget

£73.5k for lead German and UK skus, providing a framework for European roll-out

## Outline of design solution

*Andrex Fresh* had already undergone an unsuccessful redesign in 2010. At this point, the famous puppy was removed from the pack and big splashes of wet imagery were added – more indicative of a bathroom cleaning product than personal care.

Our challenge was to redesign freshness in a subtle way, yet engage with consumers within the brief four-second timeframe in which they make their bathroom product decisions. With this in mind, we employed simple visual triggers to create quick emotional connections.

### 3. Project overview continued

*Andrex Washlets*



*Andrex Washlets card sleeve*

#### **From baby bottoms to beauty**

Building on the success of our *Andrex* dry toilet tissue redesign, we added gentle moisture cues around the logo to frame the brand mark and grab consumers' attention. These cues immediately suggest 'moist' rather than 'drenched' – reassuring customers who are nervous about the product being too wet.

The old tubs were shrink-wrapped like baby wipes, so we used a card sleeve to move the packaging away from the world of baby bottoms and place it back into personal care. As the pack would be visible, we created a design that would fit aesthetically into the modern bathroom, with smoother-feeling high-lustre inks emphasising softness and quality, and helping to justify that the product was worth paying more for.



*Andrex Flushable icon*

#### **Puppies and plumbing**

To reassure consumers that the products wouldn't clog the plumbing, we included subtle ripples in the background colour to suggest easy flushing – and supported this more overtly on pack by creating a flushable icon with a subtle spiral device.

We also chose not to include the famous puppy on the pack – firstly because it's a symbol of the dry product and secondly for psychological reasons – we didn't want consumers to think of 'smelly wet dogs' and reject the pack at an instinctive level. (However the puppy remained on the outers of multipacks for shopper navigation in certain markets such as Spain where it was established).



*Bold new name*

#### **New name, new proposition**

We also needed to transition the product from the family market to adult personal care. One of the brief's key challenges was to encourage consumers to re-appraise the moist proposition, and thus we had to break the negative 'wet wipes' barrier and create a more positive, receptive mindset.

Consequently, to help with this mental reframing, we renamed the product '*Washlets*' – a friendly yet descriptive, ownable name with positive washing connotations that suggests both a cleaner result and an entirely new product that's worthy of reappraisal. Research takeout of the new name was 'a little wash', and that *Washlets* are the next best thing to 'having a wash' (State of Play project debrief – March 2011).

### 3. Project overview continued

*Andrex Washlets*

#### **Redefining clean**

One of our main aims was to challenge the perception that dry toilet roll is sufficient, without implying that people aren't clean enough – a delicate balance. For this reason, we included the line 'Change what you mean by clean' and placed it above the brand. This boldly presents the new proposition, while gently challenging people to think about their routine and try something new.



*Washlets refill pack*

## 4. Summary of results

Andrex Washlets



German Washlets packaging



# 173%

increase in Washlets profits  
year-on-year



UK non-food brand  
(The Grocer)

## Results

The Washlets redesign delivered great results for Andrex. Taking each objective in turn:

### 1. Build on the success of the Andrex mainline dry toilet tissue redesign

Following the soft launch in store (in both the UK and Europe) with no marketing support, sales in the UK from July 2011 to December 2011 (the first three to six months of launch) were immediately up by **17%**.

In addition, Andrex had a three year high of net sales value which was **+8.4%** vs previous year and an increase of **+7%** vs previous year in gross margin, plus a three year high in operating profit. Andrex's 2011 revenue also reached an all-time record, with Washlets contributing significantly to this figure.

In the UK, Andrex Washlets' profit is up **173%** year-on-year. (Q1 2012 versus Q1 2011).

On a corporate level, the success of Andrex in a difficult category has helped to make Kimberly-Clark a more interesting and desirable proposition for investors. Kimberly-Clark's share price had been static for the past decade prior to the relaunches. Post relaunch, the business has seen a **34%** share price increase, at a time when stock market values have tumbled – demonstrating how both the toilet tissue and Washlets relaunches have been a huge success for the company.

In addition, Andrex was ranked 21st in the Consumer Superbrands Official Top 500 list – up from No.33 in 2011 – and remains the UK's **No.1** non-food brand (The Grocer).



## 4. Summary of results continued

Andrex Washlets



packs sold in Q1 2012 after launch – an all time record

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# +27%

volume against a target of 12% across the whole of Europe

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# 97%

of consumers\* agree using *Andrex Washlets* regularly will help you feel cleaner

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### 2. Double the size of the European 'moist' business within five years

The new packaging achieved impressive results throughout Europe, without the support of a huge above-the-line marketing campaign. In fact, in the UK there was only a short burst of television idents, running on only one channel for only four weeks. The results were as follows:

- In the first quarter of 2012, UK (ex-factory sales) were up **51%** and repeat purchase rate remains high.
- In 2012, the UK enjoyed strong growth, with **+24%** volume and **+21%** value for the first quarter (Nielsen). To give an indication of size, the category was worth **£11m** between January and July 2011 and *Andrex* represented **52%** of this total value.
- *Andrex* aims to end 2012 with **+20%** volume vs forecast. Q1's launch saw *Andrex* achieve an all time record of **4 million** packs sold. That's an increase of **51%** over the same period in 2011.

Perhaps most crucially, in the more mature European markets where there had been no distribution gains and no advertising support, Q1 2012 showed **+27%** volume against a target of **12%** across the whole of Europe. Specifically, Spain showed a **+28%** growth and sales volume in Germany increased by **17%**. Furthermore, in *Andrex's* biggest European market – Germany – all variants gained in penetration since the relaunch. (Cotton Fresh **+25%**, Pure Sensitive **+27%** and Skin Kind **+17%**) (Source: AC Nielsen – penetration end Q1 2012 vs Q3 2011.)

### 3. Change the mindset that dry toilet roll is sufficient

One of the main objectives for this campaign was to encourage consumers to change their behaviour – leading them to view *Washlets* as a normal part of their daily routine, instead of a product reserved for people who had 'a problem'. Research conducted following the rebrand shows consumers attitudes have changed dramatically towards *Washlets*. In fact, they now view them as a very normal and habitual part of their day: **89%** of consumers\* agree *Andrex Washlets* is a product for me, **97%** of consumers\* agree using *Andrex Washlets* regularly will help you feel cleaner and **97%** of consumers\* agree using *Andrex Washlets* will make you feel fresher. (Source Millward Brown, April 2012)

## 4. Summary of results continued

*Andrex Washlets*

Consumers  
of *Andrex  
Washlets* who  
have used  
the product  
have raised  
their personal  
hygiene bar.

### **Taking the *Washlets* journey...**

*Andrex* developed an online community of 33,000 Facebook fans to engage with a daily question about their own *Washlets* journey. The fans were split into two groups – the first group consisting of those who had received a pack of *Washlets* and were going on the journey, and the second of those who were yet to start the trial. Both groups agreed that wet cleans better than dry, but this view was shared more heavily by the trialists. (Facebook insights, WCRS, April 2012).

Consumer insight also showed that, if trialled for 14 days, consumers who had used the product raised their personal hygiene bar at the end of the trial period (State of Play Moist Toilet Tissue project debrief, March 2011). These results demonstrate a clear change in the mindset of consumers – from considering dry toilet tissue to be sufficient, to agreeing that *Washlets* are a desirable product and leave you feeling much cleaner and fresher.

### **4. Redefine and reposition the product and transition the category from 'problem solving'/'not for me' to normalisation.**

When we started this project, the majority of consumers felt that moist toilet tissue was an unnecessary product – not relevant to them, and designed for people who had 'a problem'. Following our rebrand, repeat purchasers have increased by **33%** over the last 12-week period, vs the same period in 2011 (Nielsen Homescan, data up to 28th April 2012).

These repeat purchasers demonstrate that *Washlets* have become a 'normal' product for consumers to buy and use on a daily basis. They're no longer viewed as a source of embarrassment or a product for people with 'toilet problems', but instead an everyday product that they're happy to have on display.

\* previously aware of *Moist* product

## 4. Summary of results continued

*Andrex Washlets*



# 80%

of respondents preferred the new pack design when compared to the previous 'Fresh' packaging

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# 95%

of respondents said that *Andrex Washlets* took pride of place in their bathroom

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### 5. Modernise the brand, make it relevant and appealing to attract new customers, so people are proud to display it in the bathroom.

The previous *Andrex Fresh* packaging was dated, difficult to navigate and reminded consumers of cleaning products. Our redesign involved adding gentle moisture cusps around the logo to grab consumers' attention, using a card sleeve to push the packaging away from the world of baby bottoms, and using smoother-feeling high-lustre inks to emphasise softness and quality – helping to justify that the product was worth paying more for.

As a result, the new pack design was preferred by **80%** of respondents when compared to the previous 'Fresh' packaging. (Project Bullseye debrief, Project Perceptions, May 2011). In addition, respondents also remarked on the less cluttered design (Brainjuicer *Andrex Fresh* Pack Relaunch UK, Pack Optimiser, April 2011).

Perhaps most impressively, **95%** of respondents said that *Andrex Washlets* took pride of place in their bathroom (Facebook poll, WCRS) – demonstrating clearly that our packaging is relevant to consumers, and they're proud to have it on display.

The design work has clearly appealed to consumers. *Andrex's* annual target for 2012 is to attract 750,000 new customers – we achieved 712,000 new customers in the first 10 weeks of the year!

### 6. Ensure ease of navigation

Our easily navigable packaging has made a huge difference to *Andrex*. Brainjuicer research showed that the new *Washlets* pack could be found much more quickly than both previous and other alternative designs (Brainjuicer, *Andrex Fresh* Pack Relaunch UK, Pack Optimiser, April 2011).

## 4. Summary of results continued

*Andrex Washlets*

# 60%

of YTD category (dry and moist) value growth is attributable to *Washlets*

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‘After 20 years we have transformed our moist business... it’s already generating financial returns beyond expectation.’

Jon White,  
Marketing Director  
*Kimberly-Clark*

### Exceeding expectations

And if all this wasn't enough, having met our original objectives we've gone beyond the original brief:

#### **We have grown the category**

Toilet Tissue Wipes is the key driver of category value growth (including Dry & Moist toilet tissue) in 2012 to date. **60%** of YTD category value growth is attributable to *Washlets Toilet Tissue Wipes* (Source: Nielsen up to 3rd March 2012).

#### **And the client is loving it!**

‘After 20 years we have transformed our moist business – driving significant category growth as we engage with new consumers in a relevant and compelling manner. This will form the blueprint for our global growth plans, and is already generating financial returns beyond expectation.’

Jon White – Marketing Director, *Kimberly-Clark*

## 5. Other influencing factors

Andrex Washlets

### Other influencing factors

Andrex only commissioned a short burst of marketing support – with television advertising beginning in the UK on 17th January 2012 and running on one channel (Channel 4) for four weeks only.

#### Was it the advertising campaign that drove sales up?

No. Following the redesigns, UK sales rose by **51%** volume (ex-factory sales). Sales across Europe where there has been no above-the-line support have also increased by **+27%** volume. Individual countries have also seen exceptional increases – growth in Germany was **+17%**, Spain was **+28%**, Poland was **+139%** and Holland **+60%** (ex-factory Volume Growth (KC internal BW report) – signposting a huge improvement in the European 'moist' business within the first quarter alone. Countries like Germany will, however, be adopting the similar 'communications burst' model in June 2012 to further build on this already great success.

#### Was it on price promotions?

In the UK, a range of tailored in-store launch plans were implemented with the various retailers to support the customer journey from sofa to store. This consisted of bursts of activity around launch, but repeat sales levels have continued to remain high and the brand continues to grow. Nielsen evaluation shows that repeat purchase rate is up **+33%** (Q1 2012 vs Q1 2011).

#### Was Andrex's success due to any other activity?

In 2011 *Andrex* also rebranded and relaunched its dry toilet tissue range. This was hugely successful and added approx £29m to *Andrex's* revenue in 2011. However, the *Washlets* proposition was distinctly different and added sales to the brand, but **Nielsen recognise that *Washlets* was responsible for driving category growth.**



## 5. Other influencing factors continued

Andrex Washlets

### Research resources

**Brainjuicer**, Andrex Fresh Pack Relaunch UK, Pack Optimiser, April 2011

**Facebook poll**, WCRS, Washlets Evaluation 2012; sample size 109 people

**MAT 2012**, data to end March 2012 Nielsen

**Millward Brown**, Washlets Evaluation, 2012

**Nielsen Homescan**, data up to 28th April 2012

**Nielsen**, data to 28th April 2012

**Nielsen**, data to end March 2012

**Nielsen**, up to 3rd March 2012

**Project Bullseye Debrief**, Product Perceptions, May 2011

**State of Play project debrief** – March 2011

**State of Play Moist Toilet Tissue project debrief** – March 2011

