

Carman's

Real food made with real passion.

Carman's Refresh

Category
Food Producer

Client
Carman's Fine Foods

Design Consultancy
Elmwood

Date
June 2015



elmwood

Executive Summary

FOLLOWING A SUCCESSFUL REFRESH OF THE CORE MUESLI RANGE IN 2010, CARMAN'S HAS BEEN AUSTRALIA'S NUMBER ONE MUESLI BRAND, HOWEVER THEY HAVE RECENTLY FACED INCREASINGLY TOUGH MARKET CONDITIONS. THE PREMIUM PRICE PERCEPTION OF CONSUMERS COMBINED WITH LOW BARRIERS TO ENTRY FOR NEW PLAYERS AND INCREASED PRESENCE OF PRIVATE LABEL URGED THEM TO STRENGTHEN THEIR POSITION IN THEIR CATEGORY OR RISK FALLING TO THE BACK OF THE PACK.



2010



2014

21.2%

INCREASE
in BASELINE
UNIT SALES

NOTHING
TO HIDE
when it's
REAL
INSIDE



Project Overview

OUTLINE of BRIEF

As the Muesli market leader Carman's own the gourmet space, however low barriers to entry has meant a number of new players had entered the market.

With more competition from an increasing number of 'me-too' brands, it was no longer enough to simply stand for real, authentic food made with passion.

CARMAN'S PACKAGING RE-DESIGN NEEDED to:

- ✓ Strike the right balance between 'gourmet' and the perceived premium price, and reassure customers of value through appetite appeal and taste cues
- ✓ Possess an aesthetic that could be leveraged across all marketing touch points
- ✓ Deliver health benefits and better taste value by incorporating a 'natural and authentic' look
- ✓ Create a brand architecture for Carman's future growth plans beyond muesli boundaries

IN ORDER to MEET the FOLLOWING WIDER BUSINESS OBJECTIVES :

- ✓ Retain Carman's' market leadership position
- ✓ Grow Carman's' value share of breakfast products from 27.3% to over 30% in 2015

DESCRIPTION

Carman's operates in two key segments. One is the muesli category, of which the brand has five variants and is market leader. The other is the nutritious snacks category, of which it has 15 variants across muesli, nut and indulgent bars. Carman's products are sold in Australia through Coles, Woolworths and smaller retailers such as IGA and Thomas Dux. The company was founded by Carolyn Creswell in 1993 and remains proudly Australian made and owned.

CARMAN'S *is a*
LABOUR
OF LOVE SPANNING
TWO **DECADES**



2010



2014

PROJECT
OVERVIEW
CONTINUED...

OVERVIEW of MARKET

Muesli is a niche category with low overall growth. The market is relatively small when compared to the cereal category and has a lower frequency of purchase. While Australian-made is an important consideration of 86% of muesli buyers, overall awareness of the Carman's brand by the total of cereal buyers was at a low 50%.

Carman's major consumers are higher income earning women, aged 25 to 54 with an interest in health and quality food products. They enjoy the finer things in life and while aware of price, are happy to pay more for a more premium product. They value foresight, and plan ahead to keep a healthy lifestyle and diet that doesn't compromise on taste.

Due to the low barriers to enter the market, Carman's faced significant competition from a number of brands in the premium, natural category including Table of Plenty, Jordan's, Five:Am, Thank You and Lowan as well as powerhouse brands such as Kellogg's and Uncle Toby's. Along with this challenge, there has been upheaval in this sector due to a private label strategy review and consumers' perceived value of the price premium for the quality of our product.

Carman's brand positioning needed to stand out in a turbulent, crowded market and justify their position as market leaders.



COMPETITION PACKS

PROJECT LAUNCH DATE
OCTOBER 2014

SIZE of DESIGN
BUDGET and
PRODUCTION COSTS
£41,700

“FOR OVER 20 YEARS NOW, WE'VE BELIEVED
IN THE SAME SIMPLE PHILOSOPHY:
REAL FOOD MADE WITH REAL PASSION!
FOR US, IT MEANS...

FOOD SHOULD COME from the
KITCHEN, not the CHEMIST.

NUTS and SEEDS
ENRICH our WELLBEING.

WE'RE PROUD to be AUSTRALIAN
MADE and OWNED.

WE HOPE YOU ENJOY YOUR MUESLI
AS MUCH AS WE LOVE MAKING IT FOR YOU!”

CAROLYN CRESWELL
COMPANY FOUNDER
& CHIEF MUESLIOLOGIST

Outline of Design Solution



The challenge was to build consideration and trial both within the Muesli and Cereal category. Carman's key strength has always been in appealing packaging design - 57% of consumers have become aware of the brand through their packaging, in a complex market where heavy category users like variety and more than one brand in their repertoire. Therefore it was important to capitalise on this cut through.

TELLING *the* STORY

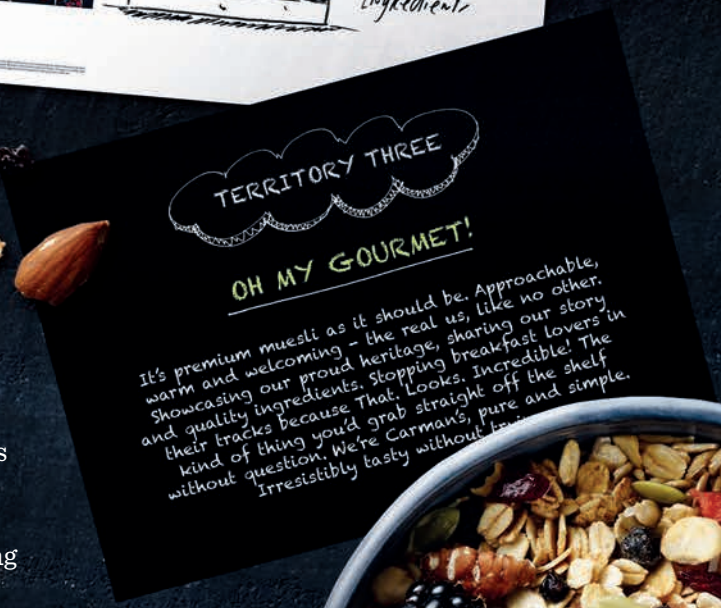
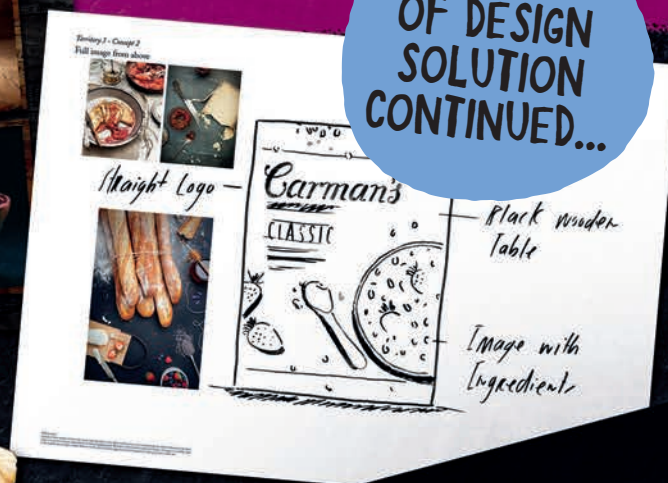
We wanted the story of the brand to continue to live through its packaging. We needed to evolve and strengthen the space that Carman's could own and allow entry into a larger context of cereals.

Our journey started with full category audits of markets in Australia, New Zealand, the U.S. and the U.K. looking at best practice and brand stand out at shelf, followed by two extensive client workshops. These learnings allowed us to develop multiple territories, which were then narrowed down to a series of industry leading scamped creative ideas for the clients' consideration.

#NO.1

in MUESLI

OUTLINE
OF DESIGN
SOLUTION
CONTINUED...



FROM the BLACK

Our lead territory, called 'From the Black' was chosen as the design strategy, which references the expansion of the iconic black background that existed on all of the Carman's packaging. We developed the design by moving away from a more conservative, cold, stark black background, towards a more approachable, rich foundation, using texture and depth, to perfectly show off the new product imagery.

FINDING the BALANCE

We needed to position Carman's as a gourmet brand using premium, natural ingredients without turning consumers off with the perceived price premium.

In order to reassure customers of value, we created appetite appeal and taste cues through boldly removing the industry-standard 'window', and instead focusing on sophisticated 'gourmet cookbook' style photography that created mouth-watering images.

To deliver the products' health benefits and better taste value, we styled the food simply with a casual scattering of ingredients which gave imagery an 'at home', authentic and relaxed feel, allowing the naturalness of the product to take centre stage.

Due to its roots in gourmet café themes and blog trends, which appeal to our female target audience, the design benefits go beyond the boundaries of muesli, giving it credibility in new product categories and marketing platforms.



OUTLINE
OF DESIGN
SOLUTION
CONTINUED...

INNOVATION *in the* DESIGN

The packs were designed with overhead imagery on the front wrapping around the side. This lead consumers to follow the brand story around the pack and also meant packs could be lined up side-to-front to form an image of one whole bowl and create a striking on shelf display.

Long paragraphs of copy on back of packs was condensed into a shorter, more casual style which injected a fun and approachable personality into the design.

The overall design lets Carman's brand story 'live' in an exciting and sophisticated way that can evolve with the brand while retaining the 'Real food made with real passion' ethos that was developed as part of the 2010 refresh that still resonates with the brand and consumers today.

REAL FOOD MADE *with*
REAL INGREDIENTS
that comes from the
KITCHEN
NOT THE CHEMIST!

“WE’VE BEEN DELIGHTED *to walk*
INTO STORES
and see the care that’s
BEEN TAKEN TO
DISPLAY THE BOXES
in the way that takes
ADVANTAGE
of the INNOVATIVE WRAP
AROUND DESIGN!”



Summary of Results

BRAND ARCHITECTURE FOR GROWTH BEYOND MUESLI

Key design elements developed for muesli products have formed the basis for the refresh across the rest of the portfolio and NPD products.

RETAIN MARKET LEADER POSITION

Consumers responded to the design elements that drew from gourmet café style and food blog trends. These additions resulted in a 21.2% increase in baseline unit sales over a period of 26 weeks between November 2014 and April 2015 (Aztec Temple). Carman's has successfully retained their number one spot in a progressively competitive environment.

ON TRACK TO GROW SHARE FROM 27.3% TO 30%

The result: a confident range of indulgent gourmet muesli boxes that flew off supermarket shelves at a 6% incline in the October 2014 quarter and at a 17% incline in the January 2015 quarter. With the help of TV ads and magazine campaigns broadcasting the new packaging, Carman's arrived well and truly at the top of their game. (Aztec Temple). Current share of breakfast at 26/04/15 has increased to 29.4%. Many of our loyal customers have reached out to applaud us on the new design making us confident in our ability to achieve 30% by the end of the year.

“THE UPDATE HAS BEEN EMBRACED *by many* of our LOYAL CUSTOMERS who have REACHED OUT TO APPLAUD *us on the* NEW DESIGN!”

OUR KEY OBJECTIVES *were TO:*

- ✓ Retain Carman's market leadership position
- ✓ Grow Carman's share of Muesli from 27.3% to over 30% by 2015
- ✓ Unify Carman's packaging with existing brand architecture

#1
MUESLI BRAND

98%

NUTS *and* SEEDS
ENRICH *our* WELLBEING.

Other Influencing Factors

The key design elements were leveraged across all marketing touch points, including TV commercials, in store activations, print material and digital and social strategy platforms, which were all centred around showcasing the new design.