

NON CONFIDENTIAL ENTRY: FOR PUBLICATION

DBA DESIGN EFFECTIVENESS AWARDS 2022

Cinnamon Toast Crunch™

SUBMISSION TITLE:
CINNAMON TOAST CRUNCH: CREATING A
NEW 'CINNAVERSE' TO TAKE A BIGGER BITE
OUT OF BREAKFAST

CLIENT COMPANY:
GENERAL MILLS

SUBMISSION DATE:
NOVEMBER 2021

Pearlfisher.



EXECUTIVE SUMMARY

HOW DO YOU TAKE A BIGGER BITE OUT OF A BREAKFAST STAPLE?

This was our challenge for General Mills in the US as we undertook establishing a bold, dynamic and multi-dimensional new creative platform and brand world for its icon of the breakfast aisles: Cinnamon Toast Crunch.

In order to deliver on our shared goal of closing the gap between consumers, the brand and culture, Cinnamon Toast Crunch required a big purpose, personality and platform and the creation of a full world of assets to re-establish the brand's relevance and standout; taking it to a whole new level, differentiating it from the competition and setting the look for all brand activation.

Loved by kids and adults alike, but with a primary market of children, we tapped into the fun-loving emotion of the brand; and by amplifying in-real-life (IRL) and multi-sensory experiences, we elevated Cinnamon Toast Crunch to become a Tween's cereal dream. Ultimately, creating a new social currency for the brand and an expansive creative platform to open a new and future world of epic, multi-sensory eating and engagement experiences through an exciting new **'CINNAVERSE'**.

Launching into an increasingly competitive, but declining, market – and then facing the impact of a global pandemic just 9 months later – presented a challenging climate for the new design. But, in just one year, Cinnamon Toast Crunch was once again not just reigning supreme against the competition but helping grow the market.

JUST SOME OF THE BRAND'S IMPRESSIVE RESULTS INCLUDE:
DRIVING CATEGORY GROWTH TO REPRESENT A STAGGERING

12% OF THE READY-TO-EAT CEREAL MARKET GROWTH IN F20

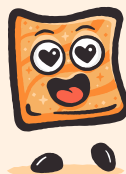
(JUNE 2019-JUNE 2020)



REDACTED
CONFIDENTIAL DATA



OVERTAKING KEY KIDS'
CEREAL COMPETITOR FOR TWO
CONSECUTIVE YEARS



THE FASTEST GROWING
KIDS' CEREAL IN 2020



CONTINUING TO GROW
SHARE YEAR ON YEAR,
POST-LOCKDOWN



OUTPACING MARKET GROWTH
TO ACHIEVE THE BRAND'S

LARGEST MARKET SHARE
SINCE 2015



RETURN ON DESIGN
INVESTMENT ACHIEVED IN
LESS THAN ONE MONTH



BACKGROUND

Known and loved for more than 35 years for its unique and epic combination of cinnamon and sugar, Cinnamon Toast Crunch is synonymous with offering a crazy, taste-filled breakfast and is a staple of US homes across each and every state.

General Mills was looking to fend off competition and reassert leadership in the category by taking this iconic super-brand – and the world of cereal – beyond the breakfast aisle and to a whole new level of eating and engagement experience.

TARGET AUDIENCE

The brand wanted to attract and interact with the discerning and highly influential Tween consumer while also re-engaging with the fun, 'pillow-fort' parents who have nostalgia for the brand and lapsed adult fans.

We immersed ourselves in the distinct subculture and unique mindset of the 10-12 year old Tween: craving the uninhibited playfulness of being a kid while looking to experience more of the world as they become a teen, desiring IRL (in real life) multi-sensory experiences but increasingly spending time detached in a digital world; which can have negative effects on their social development and wellbeing.

We focused on this challenge head-on, to give Tweens the opportunity to be creative and imaginative with the brand and its new world – by using the assets to express themselves – because Cinnamon Toast Crunch believes that the world is a more interesting and fun place when everyone brings their own individuality to the party.

OUTLINE OF PROJECT BRIEF

General Mills was looking to re-establish its iconic cereal category leadership status and share in this influential market while also opening up a new idea around future cereal innovation and engagement; both within the category and as a wider lifestyle-led brand.

The challenge was to elevate the brand communication and extend the iconic world of Cinnamon Toast Crunch to infuse all Cinnamon Toast Crunch brand touchpoints and activities – both IRL and digitally – with multi-sensory moments.

Ultimately, to create a new creative platform that could universally extend the brand's reach across audiences and brand partners (retailers, media, agencies, brand license users, internal) by designing an iconic, interactive, emotive and interpretive Cinnamon Toast Crunch brand world that would seamlessly become part of consumers' own worlds and lifestyles.



OBJECTIVES

With no change to this unique and much-loved product, the new design needed to be the key differentiator to take the Cinnamon Toast Crunch brand to a whole new level in an increasingly competitive category dominated by heavyweight cereal giants and lifestyle-led innovators. To be successful, our new brand world would:

- Create a dynamic and meaningful consumer-facing creative platform to improve brand salience and connectivity of brand communication to achieve the Cinnamon Toast Crunch purpose: REDACTED CONFIDENTIAL DATA
- Increase quantity case growth – REDACTED CONFIDENTIAL DATA
- Reinstate market leadership against the leading kids' cereal competitor
- Add incremental value – to help future product innovation and the development of new lines and brand partnerships to drive increased brand awareness
- Communicate the unique taste – as own-label and branded competitors introduce cinnamon flavors to their portfolio, Cinnamon Toast Crunch needed to take ownership of the unique taste combination of cinnamon, sugar, Cinna-dust and Cinna-milk
- Reignite the brand holistically for all key audiences and ages – including specific target sectors such as Tweens

MARKET OVERVIEW

In June 2019, when the redesign was due to launch, the US cereal category was in decline (-0.6% in 2019, following a 1.4% drop in 2018) (Source: Nielsen).

An overview of the ready-to-eat kids' cereal market showed Cinnamon Toast Crunch's key competitor leading the market with sales of \$424.85 (million US dollars), with Cinnamon Toast Crunch in 2nd at \$400.95. (Source: Statista.com)

Not only was the key competitor nudging ahead of Cinnamon Toast Crunch, but this was a market showing increased penetration of flavor-first competition – particularly with new flavor varieties in classic cereals – set against a growing trend for more child-friendly innovations. Added to this, just 9 months after launch, the market would feel the global impact of COVID-19.

Given the diverse dynamics and challenges of the category, a lot was expected of the new creative platform and brand world as the sole vehicles to support the brand's objectives.

Fast forward to Autumn 2021 and breakfast cereal has become a huge growth market globally; expected to grow annually by 0.48% (CAGR 2021-2026), with most revenue generated in the United States (\$21,476m predicted in 2021) (Source: Statista.com). Undoubtedly, some of this growth is down to the global pandemic keeping people at home and giving them more opportunities to eat cereal. However Cinnamon Toast Crunch's performance post redesign has played a significant role in driving growth beyond the market rate and taking share from key competitors.

KEY FACTS

Project launch date: June 2019

Design fees: REDACTED CONFIDENTIAL DATA

DESIGN SOLUTION

THE DESIGN SOLUTION TRULY COMES FROM UNDERSTANDING THE **TWEEN CONSUMER**, HAVING IMMERSED OURSELVES IN THEIR WORLDS THROUGH FOCUS GROUPS AND RESEARCH INTO THEIR **PASSIONS** ACROSS TV, FILM, SOCIAL CONTENT AND CULTURAL EXPERIENCES. BY EMBRACING THEIR **MORE-IS-MORE** WORLDS, EXPERIENCES AND EMOTIONS, WE DRAW THEM INTO THE CINNAMON TOAST CRUNCH '**CINNAVERSE**' - A WORLD OF **EXTRAMOREORDINARY** EXPERIENCES THAT ENCOURAGE THEM TO EMBRACE EXACTLY WHO THEY ARE AND UNLEASH THE FEELING OF 'BEING OUR **WEIRD, WONDERFUL, AWESOME SELVES**'.

At the heart of the new design is countless interactive and multi-sensory new '**CINNAMOJIS**'; hand-illustrated characters reminiscent of a contemporary Tween cartoon world. The Cinnamoji's have no names or genders and simply convey emotions, mood or personality through a set of facial expressions, uniquely conveyed through different lively sets of eyes and mouths including an often stuck-out tongue. The Cinnamoji's open up a whole new world of interaction, whether static – for example on the back of the cereal boxes – or animated. Our creation of GIFs enables Tweens to simply and creatively use this fun and exuberant toolkit to bring to life their own personalities, express their emotions or respond to situations in real time by sharing the faces – whether helping them to socialise and tackle loneliness (particularly important during lockdown) or to communicate about the stresses they encounter on a daily basis.

The multi-sensory experiences of the '**CINNAVERSE**' are vividly brought to life through a set of key brand colors, including cinnamon-like hues, and a whole host of new spontaneous, mixing, swirling and ever-changing patterns designed to reflect the multi-faceted personalities of the Tweens.

Two new and bespoke font faces are unique to the Cinnamon Toast Crunch brand. The first – a fully

formed alphabet, with both English and Spanish symbols, representing the cinnamon cereal shape allows for new custom words to be created. The second – a milk text illustration resembling the liquid-like cinnamon speckles left in the bowl – brings to life the totally delicious '**CINNAMILK**' that is an important part of any fans' eating experience and is a new way to communicate and elevate the unique and inimitable taste sensation offered by Cinnamon Taste Crunch.

The universal visual design system is complemented by our new tone of voice and bite-sized, snackable messaging – created in both Spanish and English, the same as the new Alphabet – to broaden the multi-cultural reach of the brand and its communications.

Each element of the Cinnamon Toast Crunch rebrand is fluid and agile, combining to immerse the senses in ever-changing moments, making way for endless possibilities with new sights, sounds, smells and taste sensations across all touchpoints – whether it be on packaging, social, website, print, digital media or through IRL experiences.

Cinnamon Toast Crunch fans – young, old, current or lapsed – should now hear the crunch, feel the swirl, and want to cannonball into the multi-sensory world of the new '**CINNAVERSE**'.





RESULTS

The new-look brand world for Cinnamon Toast Crunch launched into a competitive and innovative market place but one in overall decline, and further impacted by the pandemic. In a tough and ever-changing economic and market climate, and just one year post-redesign, Cinnamon Toast Crunch was driving category growth, beating off competition and opening up a new world of multi-sensory experiences for its fans.

IMPRESSIVE CORE BASE EOC GROWTH OF 9.2% POST-REDESIGN

Cinnamon Toast Crunch showed impressive growth of REDACTED CONFIDENTIAL DATA in the year post-redesign – an increase of 9.2% vs 2019.

DRIVING CATEGORY GROWTH TO REPRESENT A STAGGERING 12% OF RTE CEREAL GROWTH

The category went from being in decline – 0.9% dollar volume (2018-2019) – to +5.7% dollar volume (2019-2020) post re-design with Cinnamon Toast Crunch representing 12% of the ready-to-eat cereal growth in Fiscal20 (June 2019-June 2020).

BECOMING THE FASTEST-GROWING KIDS' CEREAL

A phenomenal acceleration in sales saw Cinnamon Toast Crunch become the fastest-growing kids' cereal brand in 2020, selling REDACTED CONFIDENTIAL DATA vs 2019.

OUTPACING MARKET GROWTH TO ACHIEVE THE BRAND'S LARGEST MARKET SHARE SINCE 2015

Cinnamon Toast Crunch's growth following the launch of the new design saw them achieve market share of 4.7% in 2020 (+0.21pp vs 2019) – the brand's largest share since in six years.

OVERTAKING AND OUTPERFORMING THE KEY KIDS' CEREAL COMPETITOR IN BOTH 2020 AND 2021

Whilst Cinnamon Toast Crunch saw this growth of 0.21pp in F20 (vs F19), the key competitor only gained +0.7pp. And in 2021, this competitor lost massive share at -0.44pp, compared to Cinnamon Toast Crunch's impressive +0.32pp.

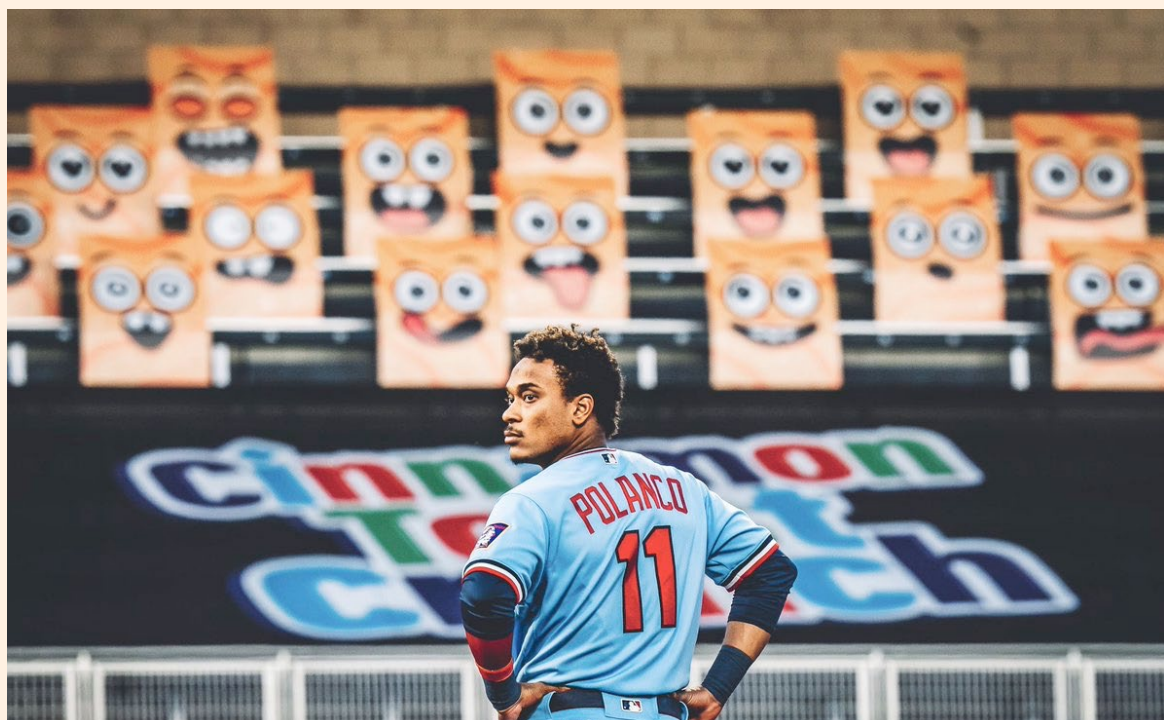
CONTINUING TO GROW MARKET SHARE INTO 2021 POST-LOCKDOWN

Despite the world coming out of lockdown, kids returning to school, and the continued uncertainty of the economic climate, Cinnamon Toast Crunch has shown continued and consistent growth in dollar share into 2021 – with a leap from +0.10pp in May to +0.28pp in July.

LEADING ALL MULTI-DIMENSIONAL AND CREATIVE CAMPAIGN ACTIVATION

The new creative platform and brand world has allowed Cinnamon Toast Crunch to infiltrate the world with Cinnamojis and has formed the basis of all campaign activity for advertising, marketing and sales promotion. The TV ad campaign - 'Unlock the Cinnaverse' - introduced the world to the new Cinnamojis and the Cinnamon Toast Crunch experience. The Cinnamoji's appeared as cut-outs during the Mexico national football Team's #MexTour at the Los Angeles Memorial Coliseum and as seat covers in the Miami Marlins and Minnesota stands to keep the fan experience alive and fill up empty seats during lockdown. The Cinnamoji's have also appeared as memes on social media and a whole Insta campaign featured just the new patterns (now an indelible aspect and visual asset of the brand).





INSPIRATIONAL NEW INNOVATION PIPELINES, BRAND PARTNERSHIPS AND LICENSING

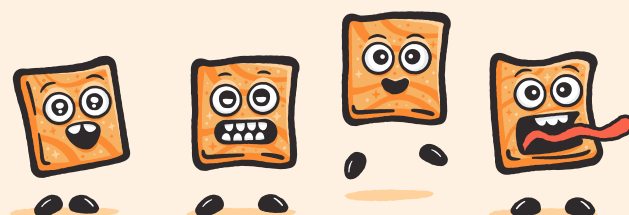
One of the brand's objectives was about driving awareness through new partnerships and the new creative platform has been fundamental in gaining the interest of external parties in terms of product innovations, collaborations and new licensee agreements. Adding a new cool-factor to the Cinnamon Toast Crunch brand, Sportswear brand Champion is now 'serving a taste you can see' with a branded range of t-shirts and hoodies featuring the Cinnamojis. Meanwhile, Nestlé and General Mills have collaborated on a new Cinnamon Toast Crunch Liquid Coffee Creamer to offer 'a yummy cinnamon swirl right in your coffee'.

PHENOMENAL ROI ON DESIGN INVESTMENT

It took just one month to recoup the REDACTED CONFIDENTIAL DATA design investment based on revenue generated.

DESIGN AS A KEY PLATFORM FOR FUTURE INNOVATION AND PLANS

REDACTED CONFIDENTIAL DATA



OTHER INFLUENCING FACTORS

WAS IT CHANGING CONSUMER HABITS DUE TO COVID-19?

One could argue that with more people stuck at home during the pandemic, buying cereal, coupled with a higher level of social media engagement and the opportunity for new snacking occasions in the house, could have contributed to driving higher growth and uptake across the category. However, the results clearly illustrate that Cinnamon Toast Crunch's performance can't only be down to the pandemic because:

1. Cinnamon Toast Crunch's growth was significantly higher than market growth
2. Cinnamon Toast Crunch was driving the category growth
3. The main kids' cereal competitor lost market share
4. Growth continued even when children started returning to school, adults started returning to work and the world began coming out of lockdown in 2021

WAS IT OTHER MARKETING ACTIVITY?

All other marketing activity – from sponsorship and events to social media challenges – has all been led by the new brand world and cinnamojis. But this was the very reason for the creation of a new and multi-dimensional brand platform, rather than just one design touchpoint, that could come to life in an evolving myriad of ways and encourage fans to get creative and use Cinnamon Toast Crunch to create their own content. It's a brand for Gen Z, designed to meet and engage with them on their terms and the channels they live their lives by.

WAS IT SALES PROMOTIONS?

With a world in and out of lockdown, usual sales promotion activity was subject to change. Some short-term campaigns – such as the give-away of a million free boxes to thank fans for making Cinnamon Toast Crunch one of America's favorite cereals – capitalized on engaging audiences via all mediums in recognition

of the fact that many were now prioritizing digital engagement. However, this only ran from 2nd September 2020 to 30th September 2020. Moreover, sales promotion activity was activated using the strength of the new design and its direct correlation in driving brand sales and success.

WAS IT INCREASED MARKETING SPEND?

Marketing spend did increase between 2019 and 2020 but this is in line with the brand's expected annual increment. This suggests that the strength of the new design and parallel campaign activation of the creative platform and brand world is playing a significant role in driving sales and uptake. In fact, the Cinnamoji's, in particular, have demonstrated a significant increase in user generated content; creating free, evolving and self-fulfilling promotion of the brand across channels.

WAS IT SEASONALITY?

Although there is no rigid seasonality in this category, ready-to-eat cereals are generally governed and split into hot and cold categories. Sales increases remained consistent through the winter months when consumers tend to reach for hot options, illustrates that seasonal trends can't be responsible for the brand's success.

DATA SOURCES

- General Mills internal data: 2019-2021
- Nielsen Scan. Total US xAOC; \$ Share of RTE Cereal; Fiscal Year 19 (52 weeks ending 6/1/19) vs. Fiscal Year 20 (52 weeks ending 5/30/20).
- Nielsen Scan. Total US xAOC; \$ Volume; Calendar 2019 vs. Calendar 2020.
- Statista.com