Comfort Intense Fabric Conditioners

Industry sector:
Household Goods

Design consultancy:
PB Creative

Client company:
Unilever

Submission Date:
1 July 2016

"Bubbly, modern, explosive, it rocks, happy, new, techno"

(TNS Qualitative Research January 2014)

For Publication

2. Executive Summary (294 word count)

Comfort Intense was launched in the UK, FR, NL and Ireland in April 2015 as a new format in the fabric conditioner market. It's an ultra-concentrated fabric conditioner which offers improved performance (a more intense and longer-lasting freshness), using less than half the dose of existing fabric conditioners. Its success has been immediate and sustained over a one year period.

Designing the packaging for a concentrated product in a smaller pack and positioned at a premium price is a huge challenge. We believe one of the main reasons for Comfort Intense's success is that the holistic structural and graphic design of the pack communicates the ultra-concentrated concept and its benefits effectively to consumers in a way that their key main competitor failed to do with its Super Concentrate relaunch (a similar proposition in terms of concentration).

Although there was advertising support, Comfort Intense was successful before this support kicked in, and we have tracked TV advertising against sales to show that it had minimal influence. Our conclusion is therefore that the pack has been the key factor in Comfort Intense's success, and this is evidenced by several pieces of consumer research.

There are 6 measures we have used as evidence for the success of the pack design:

1. Comfort Intense is positioned at a premium price, with a pack that's less than half the size
2. It has gained significant market share from the start, with strong shelf stand-out
3. It has succeeded in trading up existing Comfort users, whilst also switching users from competitor brands
4. It has grown the overall fabric conditioner category
5. It has successfully influenced a change in consumer behaviour through the pack design and smaller cap
6. The smaller pack creates significant environmental savings

3. Project Overview (519 word count)

3.1 Overview of market

Across Europe the concentrate segment of the fabric conditioner category has been increasing steadily, with a 70% share by the end of 2015. Unilever is driving this conversion from dilutes to concentrates with 75% of its sales now in this segment.

The market is extremely price sensitive and heavily discounted more than 65% of the time (Nielsen, MAT Apr'16). It is one of the most complex aisles in store, with a multitude of brands and variants on shelf, making shelf stand-out key.

3.2 Outline of project brief

The Comfort Intense range was intended to challenge category norms and 'shake up' the fabric conditioner market. Long term aims were to use Intense to replace concentrates over the next 5 years. Conceptually, the theme of 'concentration' isn't something which resonates with consumers, so the product proposition focused on 'intensity' in order to connect with consumers in a way that would be relevant.

The key objectives of the packaging design brief were to:

- Use a 'disruptive' pack design to trigger a change in consumer dosing habits (from Comfort's standard concentrate 35ml dose to a 15ml ultra-concentrated dose)
- Communicate 'incredibly intense freshness' in just one drop

- Justify a premium over the standard Comfort concentrate (and more premium than Sensorials) to become Comfort's most premium product
- Drive trade-up from standard Comfort concentrate and competitive products
- Create high stand-out on shelf for a pack which is smaller and more expensive
- Help deliver gross margin improvement
- Utilise existing production lines
- Create environmental savings through a reduction in pack weight, water & GHG, waste, and shipping

"The packaging will play a key role in communicating the benefits of our ultra-concentration formulation"

Hugh Rieley, Technical Project Leader (at time of project)

"It is the responsibility of the packaging to drive consumer acceptance and belief in an 'intensely' concentrated dosage size"

Bert Nijhuis, Unilever Laundry CTI Director (at time of project)

"We have a new and unique product. Our packaging must be a reflection of this step change for fabric conditioners"

Hajar Alafifi, Brand Director Fabric Conditioners Europe (at time of project)

3.3 Description

The product uses a much smaller dose per wash than existing concentrates (15ml versus main competitor at 25ml and standard Comfort concentrate at 35ml) and has an intense, longer lasting freshness thanks to its new fragrance technology. The smaller dose means the pack size can be more than 50% smaller/lighter for the equivalent number of washes. However, with a premium price for a smaller pack, shelf impact is key.

There are two pack sizes (570ml and 960ml) and four fragrance variants: Fresh Sky, Fuchsia Passion, Sunburst and Ocean Pearl.

Comfort Intense was launched in 4 markets: UK, Ireland, France, Netherlands under local brand names: Comfort (UK & Ireland), Robijn (Netherlands), Cajoline (France).

3.4 Project launch date

1 April 2015 - Netherlands
15 April 2015 – UK, Ireland, France

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4. Outline of design solution (393 word count)

PB Creative was initially commissioned in May 2011 to design the structural packaging for Comfort Intense, a new product in the Comfort range. The 3D design work consistently researched well and in 2013 PB Creative was asked to submit 2D concepts for research alongside the incumbent agency's 2D concepts. The top two winning concepts were those submitted by PB Creative and the agency was then briefed to continue with the development of both graphics and structure.

A key principle of PB Creative's design was to lock together 'Comfort Intense' and create a strong, exciting 'explosive' graphic to represent the intensity of the ultra-concentrate product inside. Given the reduced size of the pack, it was clear that its form and graphics would have to work much harder to create strong shelf stand-out. The end result is a bold and confident pack that jumps out on-shelf.

Each variant colour starts at the base with 'Comfort' blue and then graduates into the variant colour, whilst the 'Ultra Concentrate' band reinforces the 'reason to believe' and brand credibility whilst detracting from the top edge of the shrink sleeve. Icons are used to inject more personality into the product, and bubbles up the side of the pack and conversational copy replace the standard strip to indicate how much product remains.

The 'droplet' shaped structure epitomises the concept of intense freshness in every drop and stands out from the largely rectangular forms of competitor brands. The flared surfaces on both front and rear add rigidity at the top of the pack and make it easier to hold and pour, as does the precise and integral pouring spout. The cap is deliberately neat and compact, utilising a frosted translucent material for improved visibility to encourage correct dosing. A key objective was to promote a change in consumer behaviour and 'reassure' consumers that Comfort Intense offers better performance in a much smaller 15ml dose. Learnings from their key main competitors super concentrate showed that a larger cap and disbelief in the concentrated proposition make it much easier for consumers to overdose.

The new pack had to run down the existing production line, using all existing equipment whilst maintaining the same footprint as the existing Comfort packs, yet be revolutionary in its appeal. Research throughout the project and its subsequent success in the 13 months since launch demonstrates the effectiveness of the final design.

5. Summary of results

5.1 Comfort Intense is positioned at a premium price, with a pack that's less than half the size

In the UK, Comfort Intense (570ml bottle, 38 washes) market data shows that it is sold by retailers at a 32% price premium over standard concentrated Comfort (1.5 litre bottle, 42 washes), yet it manages to do this in a pack that's less than half the size. This is only possible if the concept of an ultra-concentrated product with improved performance is being communicated clearly to consumers on shelf via the pack.

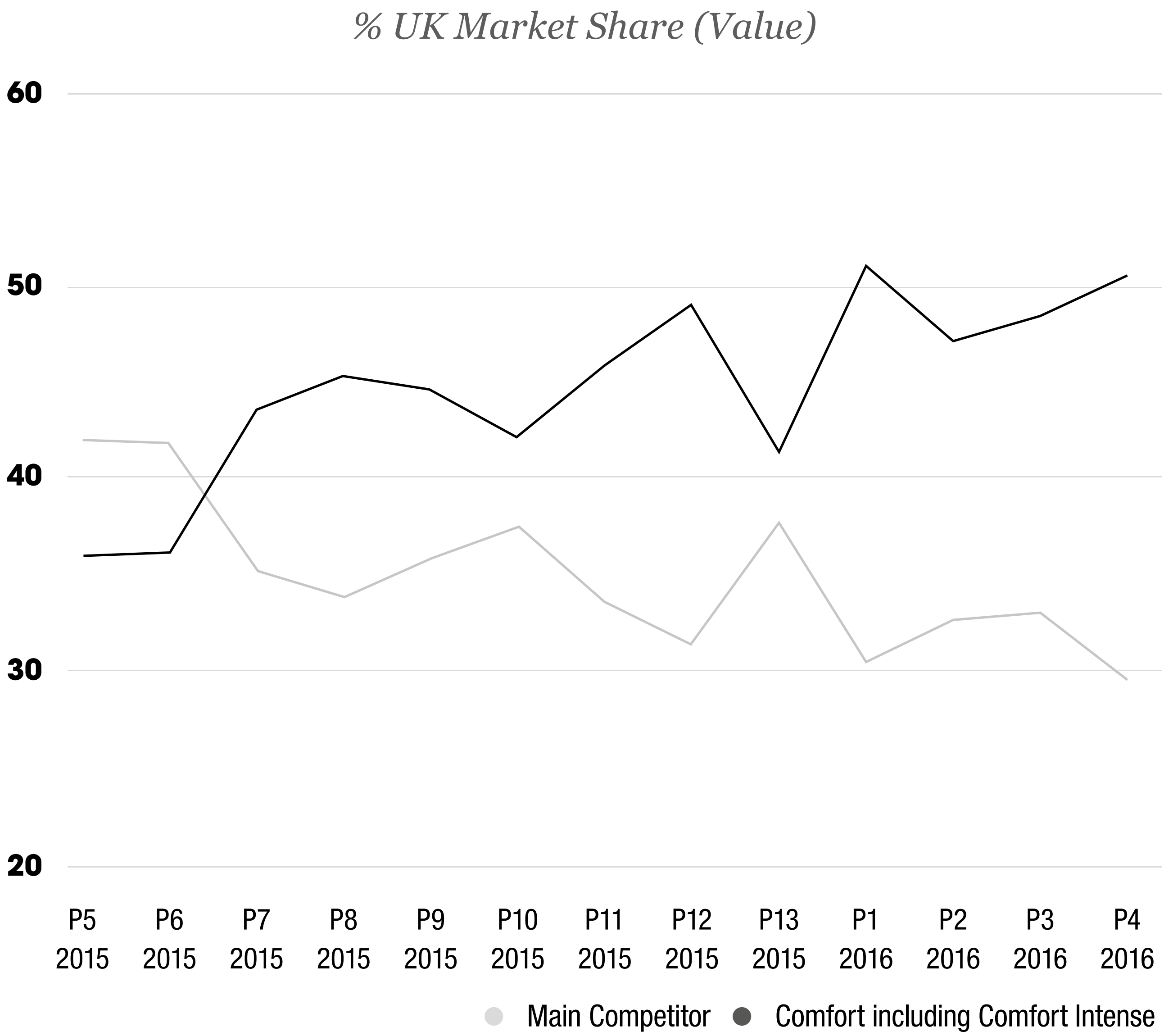
0.094 £ per wash **0.071 £ per wash** **0.076 £ per wash** **0.059 £ per wash**

32% price premium at RRP **29% price premium at RRP**

*NB. * pricing is at the sole discretion of the retailer. When referring to RRP (Retailer Resale Price), this is based on market data collected from prices set up by retailers on their own initiative.*

5.2 It has gained significant market share from the start, with strong shelf stand-out

Comfort Intense gained significant market share from the moment it was launched and has resulted in Comfort overtaking their key main competitor in UK market share. We believe this is a result of the pack design, both compared to competitor brands but also compared to standard concentrated Comfort. For a focus on the first few month's sales, prior to TV support, please see section 6.1.



UK consumer testing provides further evidence of Comfort Intense's success versus their key main competitor and attributes this to the pack design. When consumers were asked to rate both Comfort Intense and the key main competitor pack designs on the basis of 'attractive appearance,' Comfort Intense scored significantly higher (4.22 vs 4.04). (IPSOS Consumer Market Insights, 20 January 2014, featuring 200 testers)

The pack design also performed well in on-shelf evaluations of 200 category users. 49% of fabric conditioner users and 56% of current Comfort users scored Comfort Intense as having "more attractive packaging than other brands." The pack was also 'found' on shelf quickly, with more consumers re-examining the pack. PRS concluded that Comfort Intense had "created disruption through the vibrancy of the pack". (IPSOS Consumer Market Insights, 20 January 2014). Throughout the design project various research exercises have evidenced positive comments about both graphics and pack structure.

	% who noted in 4 seconds	% who re-examined the pack
Comfort Intense	60	41
Standard Concentrated Comfort	36	28

(IPSOS Consumer Market Insights, 20 January 2014)

"I like the design of the bottle and packaging"

"The smaller bottle is better for environment and fits nicely in my cupboard.... The packaging is pretty too when it is out on the side on laundry days."

"The packaging was eye catching and something I would pick in a supermarket... I was very impressed when I opened the parcel."

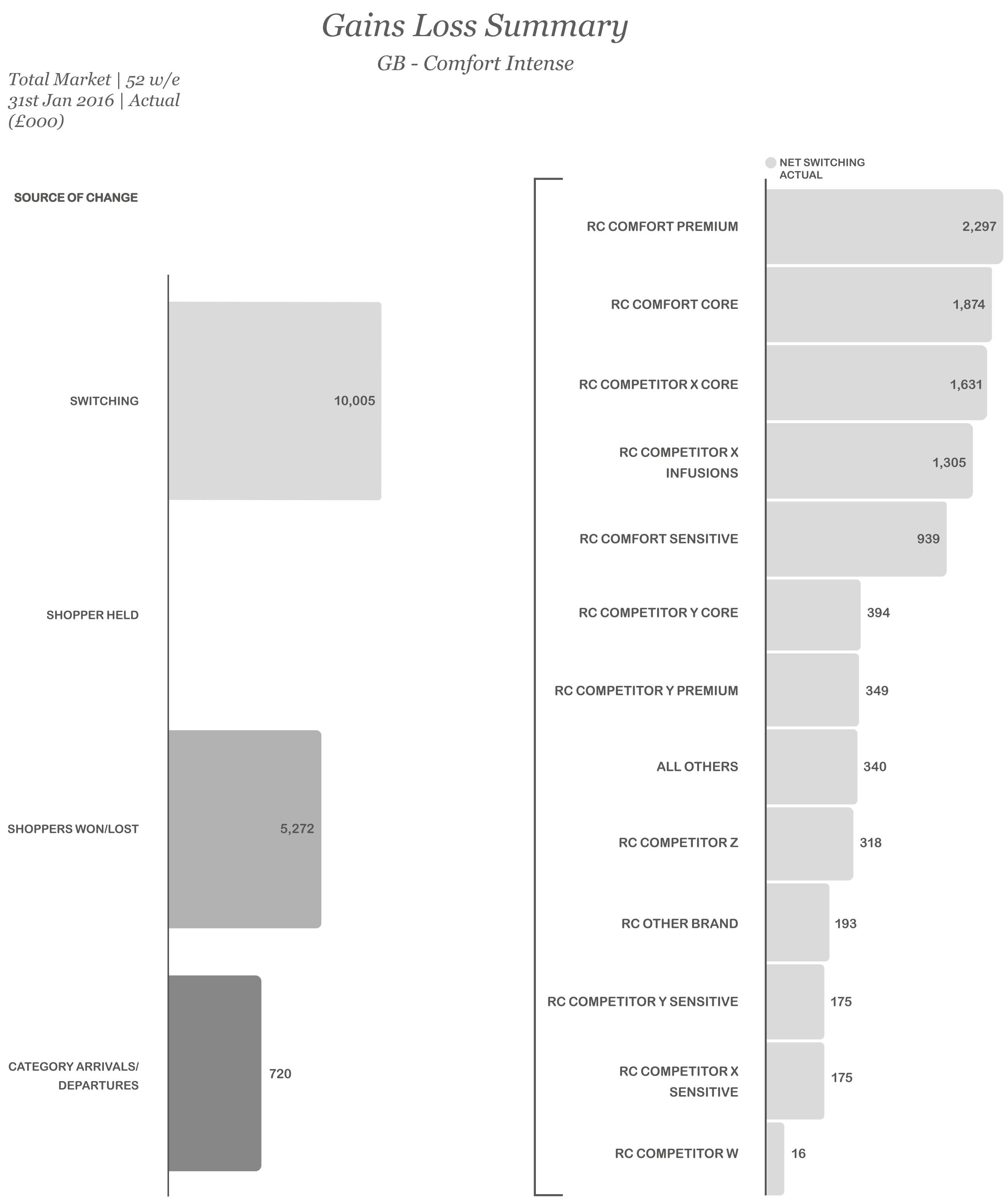
Comments from Comfort Intense consumer reviews May 2015

Comfort Intense also won TNS Product of the Year 2016, with a score of 81% for "appeal" against the category average of 50%.

5.3 It has succeeded in trading up existing Comfort users, whilst also switching users from competitor brands

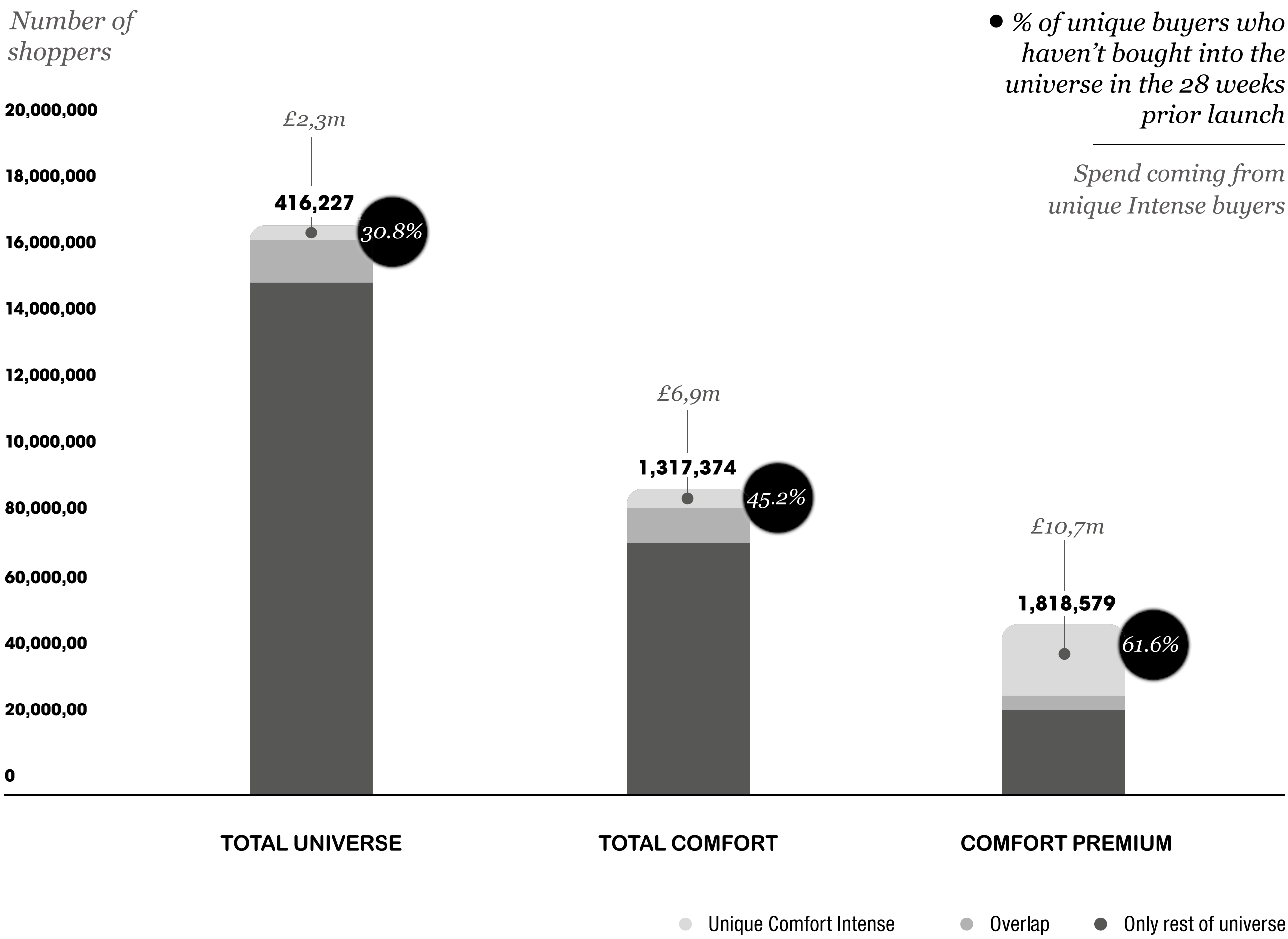
Comfort Intense is positioned as a superior range that will replace the standard concentrated Comfort product going forwards, so cannibalisation was expected. This makes sense from a consumer perspective, as Comfort Intense is an ultra-concentrate in a new pack, with better product performance, so there are good reasons for consumers to switch to the new product.

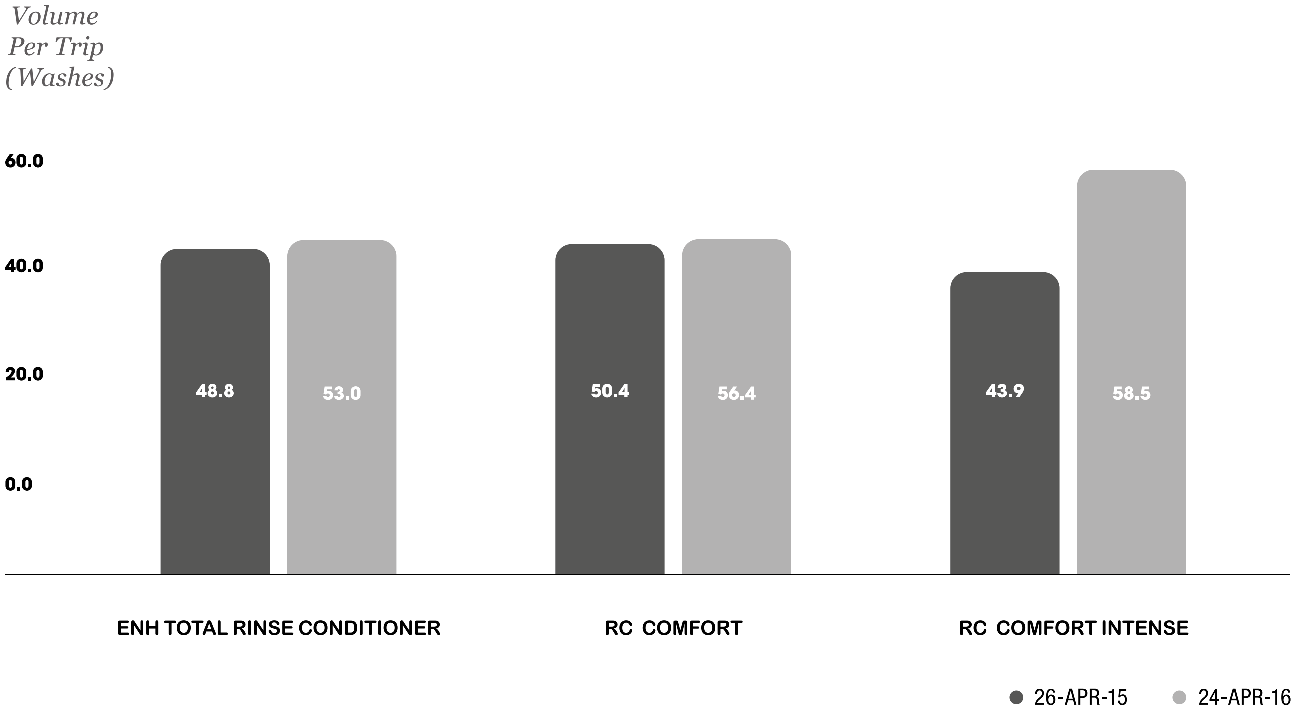
In pre-launch testing with Nielsen Bases II, cannibalization was estimated at 65%. Actual cannibalization of Comfort was only 51%, with 49% of growth coming from competitors, including 31% from their key main competitor (Neilsen statistics).



5.4 It has grown the overall fabric conditioner category

Comfort Intense has helped grow the market by persuading consumers to buy more washes per shopping trip with a higher price per wash. There were also newcomers to the category in the first 24 weeks thanks to Comfort Intense.





5.5 It has successfully influenced a change in consumer behaviour through the pack design and smaller cap

In product tests of 200 users conducted between 14 November 2014 & 19 December 2014 (IPSOS Consumer Market Insight research January 2015), Comfort Intense was compared to the key main competitor (Super Concentrate).

This showed that **46%** of Comfort Intense testers used less product than they would normally use whilst only **34%** of the main competitor testers used less. More testers also found it to be just the right amount, and 'enough' product.

This is down to the design of the pack and the smaller cap, semi-transparent material and pouring spout which promote greater accuracy and prevent users overdosing (unless they choose to use more than one capful). In contrast, the larger competitor cap makes overdosing easier.

	Comfort Intense	Main Competitor
Used Less Product Than Normal	46%	34%
Just The Right Amount	83%	77%
Not Enough Product	12%	18%

Main Competitor Comfort Intense

5.6 The smaller pack creates significant environment savings

Despite the concentrated product, the pack design could have been overly large in order to increase shelf impact. Because the design has successfully communicated the ultra-concentrate concept so effectively in such a small pack, it has achieved a 57% reduction in water, a 43% reduction in waste, and a 27% reduction in GHG (Unilever data).

Just taking the 570ml (38 washes) bottle, and based on the number of units already sold (just under 6 million), this is a 214 tonne saving in packaging waste. That's the equivalent of a large blue whale or 8 xDC-9 aircrafts.

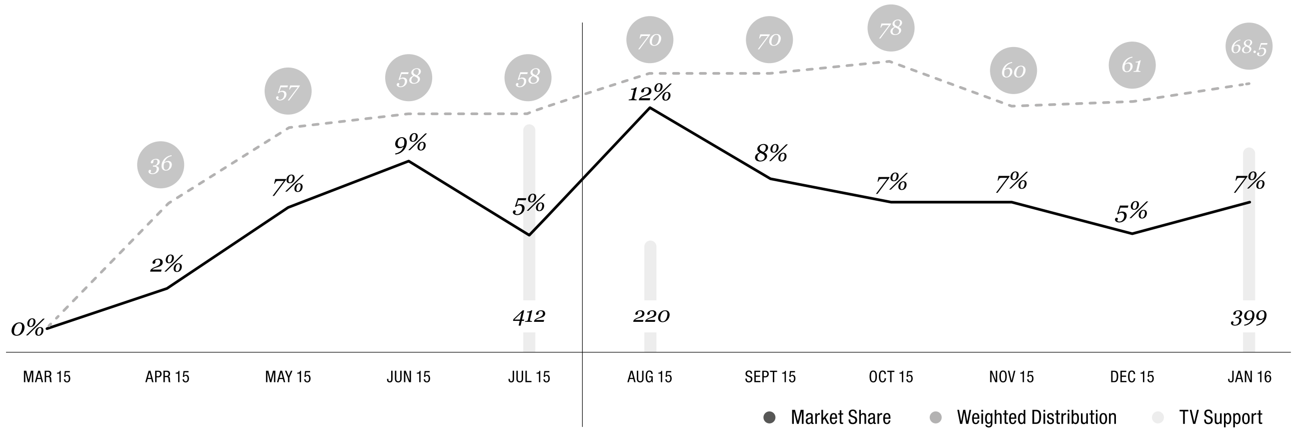
						Economies	
	Per wash	Comfort	- Comfort intense	=	x 38 washes	x 5,999,000 units sold
-57% ▸	Less Water	35ml	15ml	20ml	760ml	4.559.240L
-43% ▸	Less Waste	2.20g	1.26g	0.94g	35.72g	214T
-27% ▸	Less GHG	30g	22g	8g	304g	18,240T

6. Other Influencing Factors

6.1 TV Support

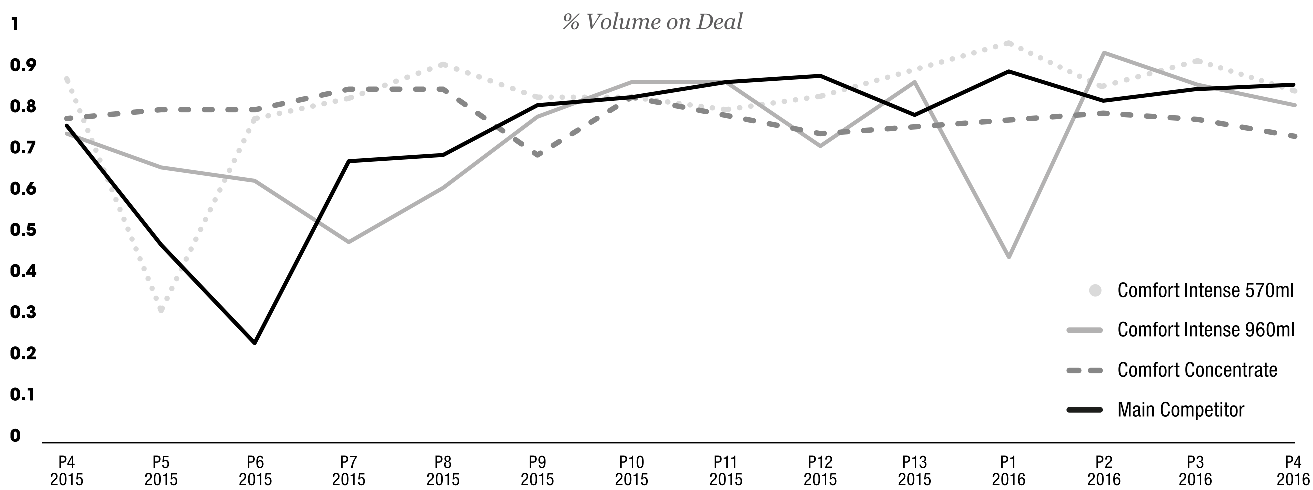
Comfort Intense was launched on 15 April in the UK, with no TV support until July 2015 (TV support figures from Mindshare). The only way that market share could have been gained in this period is for shoppers to understand the concept on-shelf and buy the product.

Comfort Intense had gained 9% (AC Nielsen) market share in the UK within 8 weeks, with weighted distribution of 58% before TV support kicked in.



6.2 Price Discounting

The fabric conditioner category in Europe is permanently heavily price discounted, for all brands. This creates a level playing field and can therefore be excluded as a factor in Comfort Intense's success.



6.3 Website

There is a Comfort Intense website, but it is not seen as one of the primary marketing tools.
"The primary role for the website is to build a relationship with consumers and recruit for our testing panels. It was not seen as a key driver for sales which we knew would come predominantly from the brand's presence in-store." Yasemin Kural, Senior Brand Manager Fabric Conditioners Europe.

6.4 PR

Unilever will always support new products with PR (as does P&G with its competitor brand), but this will not translate into sales unless consumers are reassured by the pack on-shelf.

7. Research Resources

Data has come mainly from Neilsen figures.
TV support data is from Mindshare.
Environmental savings data is from Unilever
Research sources comprise:

- IPSOS Consumer Market Insights, 20 January 2014
- TNS Qualitative Research January 2014
- Comments from Comfort Intense consumer reviews May 2015
- Perception Research Services On-Shelf Evaluation January 2014