



BY APPOINTMENT TO HER MAJESTY QUEEN ELIZABETH II
TEA & COFFEE MERCHANTS R. TWINING AND COMPANY LIMITED. LONDON.

TWININGS

sweet greens

Industry sector

Consumer Goods/Food & Beverage/
Beverage/Soft Drinks

Client Company

Twining's UK

Design Consultancy

BrandOpus

Submission Date

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For Publication

"The exclusive and innovative blends we'd created for our new Sweet Greens range needed to be brought to life in a such a way as to grab the consumer's attention and challenge their perceptions of what a green tea could be. The designs BrandOpus delivered have excited and inspired a whole new audience for Twinings green teas and helped us achieve remarkable results following the launch."

Stacey Humphrey

Marketing Assistant, R. Twinings & Company Ltd.





Executive Summary

Green tea consumption had been on the rise in the UK for the past decade, however the **increase in incremental sales was still slow**, with green tea's bitter taste acting as a barrier for many would-be drinkers.

Twinnings had previously achieved success with **introducing new ranges to inspire and excite** the existing green tea drinker. These included incorporating flavours such as jasmine, apple or mint to make green tea better suited for all times of day and occasions.

However, the market still lacked an enticing entry-level flavour range to attract the reluctant non-green tea drinking public.

Twinnings made a move to **disrupt the entire category** by introducing a breakthrough new range of sweet green flavour variants designed to appeal to an audience that had previously shunned green tea. This was the more palatable green tea we'd all been waiting for.



sales
value of
£100k in
12 weeks





Executive Summary (cont.)

Twinnings Sweet Greens was born, a range combining the high antioxidant and metabolism-boosting qualities of green tea with the **sweetness and excitement of a selection of popular desserts**. The range targets those who 'dabble' in health, but are put off by the traditional 'bitterness' of green tea. BrandOpus worked with Twinnings to develop designs for the range that helped to **create distinction from the existing greens ranges**, bring uniqueness to the individual flavours and appeal to a new audience with different tastes.

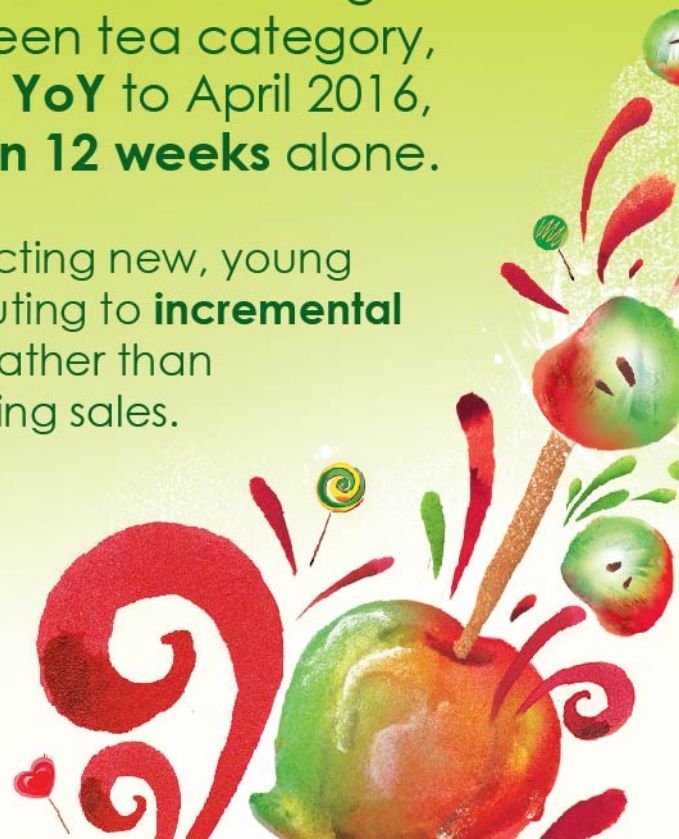


sales
volumes
up **22.4%**
YoY

The natural flavours – including Gingerbread and Salted Caramel – make it easier for newcomers to try green tea whilst giving existing drinkers more variety.

Sweet Greens is driving growth in the green tea category, with **sales volumes up 22.4% YoY** to April 2016, and **sales value of £100,497 in 12 weeks** alone.

The range is successfully attracting new, young female drinkers that are contributing to **incremental sales to the category**, rather than cannibalising on existing sales.



Project Overview: Description

Twinings has built on 300 years of history and blending expertise to include exciting new product innovation and variants. As part of this, Sweet Greens was introduced to appeal to those who want to try green tea but are worried about the bitter taste.

The majority of consumers who buy into green tea do it for the health benefits, however taste is a huge barrier to purchase with new consumers.

The new range is like dessert in a cup – originally Gingerbread, Salted Caramel and Caramelised Apple Green Tea, with the range expanded by a further two flavours in 2015. The brief was to design the range of more premium taste profiles building upon the core range of greens, conveying both the amazing flavours and how they relate to the context of the wider green tea portfolio.



Outline of Project Brief

The brief to BrandOpus was to translate the indulgent taste profiles amongst the new range, whilst ensuring that it remained clear to consumers that it was within the green tea portfolio:

Project goals

1. Introduce incremental sales to Twinings
2. Ensure that the new range works strategically alongside the existing green tea range
3. Attract a new, younger audience to green tea
4. Communicate a more premium expression of green tea, suitable for health 'dabblers'

Design brief

- Explore imagery that combines a dessert feel with witty quirks
- Communicate a green tea that is sweeter and not bitter, that deliver an amazing taste hit
- Balance colours between greens for green tea and shades that represented the SKUs
- Explore new treatment of vibrant illustrations that communicate the range, whilst still feeling elegantly Twinings
- Explore naming of the blends and the range to help convey the dessert flavours





Overview of Market

Overall the volume of tea sold in the UK has been declining for years, with **volumes down by 22%**, from 97m kg to 76m kg from 2010 to 2015, according to Mintel.

Despite this slump in tea overall, green tea bags are on the increase, rising by 50% over the same time period, with fruit and herbal alternatives also growing by 31%. This switch from ordinary tea to fruit or herbal alternatives 'may be partially explained by growing health awareness amongst the public', according to retail analysts, with other suggested factors including the rise of 'foodie culture' **inspiring consumers to look for blends considered more exciting** than regular black teas.

Mintel analysts have also suggested that the 'fairly mundane' image of tea was a main challenge to the tea market, with the suggestion that the introduction of 'extreme flavours' would help attract and appeal to younger consumers, who may be more naturally drawn to the coffee market.


Twining's Sweet Green Tea range was named in the Mintel report as reacting favourably to the changing market, by introducing ranges to appeal to 'audiences with more adventurous tastes or court[ing] customers in search of a guilt-free treat'.

However, **tea remains a staple drink** for much of the British population, with 54% having at least one cup of regular tea per day. Drinking times also remain consistent, with $\frac{3}{4}$ drinking it in the morning.

The biggest consumers of regular black tea are men aged 16-44. Twining's Sweet Green Teas target young women, with a range of flavours to appeal to a variety of palettes.

Twining's Sweet Greens **remains one of the most premium** in both tea quality and price point. Clipper's Pure Green average cost of 3.5p per cup, whereas Twining's Sweet Greens is 13.45p per cup. It is also more premium than much of Twining's existing range, with Twining's Lemon & Ginger costing 4.9p, and its speciality Twining's English Breakfast costing 4.4p (both far dearer than PG tips at 1.9p in Tesco's in 2015).

At a high price point for the UK market, and introducing a new product to the market, Twining's Sweet Greens **needed to be designed with a clear premium proposition**. The exciting flavours needed to be conveyed in a way that was natural, rather than implying artificial flavours or added sugar, which could have the potential to scare the same health aware consumers that the brand was attempting to attract.



Project launch date

The original three flavours – Gingerbread, Caramelised Apple and Salted Caramel launched into Waitrose in February 2014, with other retailers following.

The range extension – Fudge Melts and Cherry Bakewell were introduced in February 2015.

Size of design budget and production costs

£60,000 for strategy and design, illustration and production.

Outline of Design Solution

BrandOpus approached the brief strategically, with the development session confirming that the range should be **rooted in Green Tea**, and be an alternative to the core range.

The differentiating offering of the blends was that they were **sweet, indulgent, dessert-like flavours**, which was to be delivered through the design. Rather than focus on the literal ingredients within the tea, BrandOpus strived to move design on to focus on a dessert-led proposition.

The design solution for Sweet Greens takes its lead from the core Greens range with the green colourway as the base on pack. However, where Sweets Greens create differentiation from the core range, and the category overall, is with the sense of **playfulness of the design**. Appealing to an entry-level audience, the designs have taken cues from the popular dessert infusions and have a more foodie appeal as a result.



Outline of Design Solution

The master blenders are renowned for adding their own unique touches to the blends, and this has been reflected through the **signature and crafted style of the illustrations**. Designed to elicit the notion of a Michelin star chef's distinctive 'swoosh' on a dessert plate, the illustrations also help to convey **the whole taste experience** as opposed to just the ingredients used within the infusion.

The Twinings' unique 'sensorial energy' device is applied within the solution, effectively binding the portfolio for consistency. The device successfully allows Twinings to bring real uniqueness to the identities across their ranges, whilst communicating to the consumer that they are all **part of the same, credible family**.

As Sweet Greens are playful in their design, yet still premium in terms of the bespoke nature of the blend, the teabags are presented within individual envelopes inside the box. This follows suit with the main approach taken across Twinings premium ranges.

The **tailor made typeface** used for the titles of the blends; Gingerbread, Cherry Bakewell, Salted Caramel, Fudge Melts and Caramelised Apple has been designed to further reflect the foodie influence. The swirls on the letters denote the sugar work and icing skills applied by top chefs when creating **signature desserts** within their restaurants.

The **sweet and foodie cues** have all been highlighted in design terms to move the new range as far away from the bitterness commonly associated with green tea as possible, attracting a new audience who have previously been turned off green because it's not accessible enough in terms of flavour appeal.

Summary of Results

In line with the project goals outlined in the brief, Twinings' Sweet Greens has resulted in an increase in sales and market value, increase in market distribution, increase in levels of engagement to a new audience and successfully communicated a more premium green tea, as detailed below:

1. Introduce incremental sales to Twinings

Twinings' Sweet Greens continues to add value to the green tea portfolio. Sweet Greens were up 21.3% YoY in sales value 12-week data in w/e 31.04.16. This compares to the core Twinings' Green tea range which is up 2.9% YoY, demonstrating that the Sweet Greens range is growing at a phenomenal rate.

For the same period **sales volume were up 22.4% YoY.**

This translates to added **sales value of £100,497 in 12 weeks** on Sweet Greens alone.

Salted Caramel SKU up YoY to July 2015

Salted Caramel Green Tea is Twinings' fastest-growing SKU, which launched back in 2014, up YoY to July 2015.

927% increase in sales via Facebook and Twitter

Twinings has seen a large increase in sales through its online stores since the introduction of Sweet Greens, with **500 orders placed in its first sales weekend.** Sales via Facebook and Twitter have also seen a **927% increase in sales** driven by Sweet Greens and there has been a **553% increase in mobile transactions**, in part driven by a younger demographic buying Sweet Greens vs. the core Greens range.

Most importantly, as was in line with the Twinings goals, the Sweet Greens range **growth has been incremental to the category.** This has ensured that the Twinings green tea portfolio range overall continues to grow without cannibalisation of sales.

This table shows 52 week penetration data for 2014/2015 and 2015/2016. Sweet Greens fall within Tier 2, therefore show that since launch new customers have been brought to Green Tea vs. the rest of the market.

	01/05/14 - 01/03/15	01/04/15 - 01/02/16
Twinings Green	7.43	8.03
Twinings Tier 1	7.06	6.76
Twinings Tier 2	0.49	1.52
Twinings Tier 3	0.09	0.25
Clipper Tier 1	3.51	3.76
PG Tips Tier 1	2.00	2.24
Pukka Tier 2	0.41	0.53
Taylors Tier 1	0.00	0.42
Teapigs Tier 3	0.14	0.19

Sweet Greens (Included in Twinings Tier 2) tripled in size during this period.

Summary of Results (cont.)

Sweet Greens has also led a much **stronger conversion rate** than seen in other ranges, along with **strong repeat rates**. The best selling SKU in Sweet Greens has **45% repeat rate of purchase**. This is far higher than the core greens range; the highest there has a repeat rate of purchase of 31%.

45%
repeat rate
of purchase

2. Ensure that the new range works strategically alongside the existing green tea range

The popularity of the Twinings Sweet tea has **allowed for range extension**, with two new SKU's introduced in February 2015 to cope with the popularity of the new range.

Mainstream teas are rapidly losing space in store to premium tea offerings, which Twinings has been able to capitalise on for its Sweet Greens range.

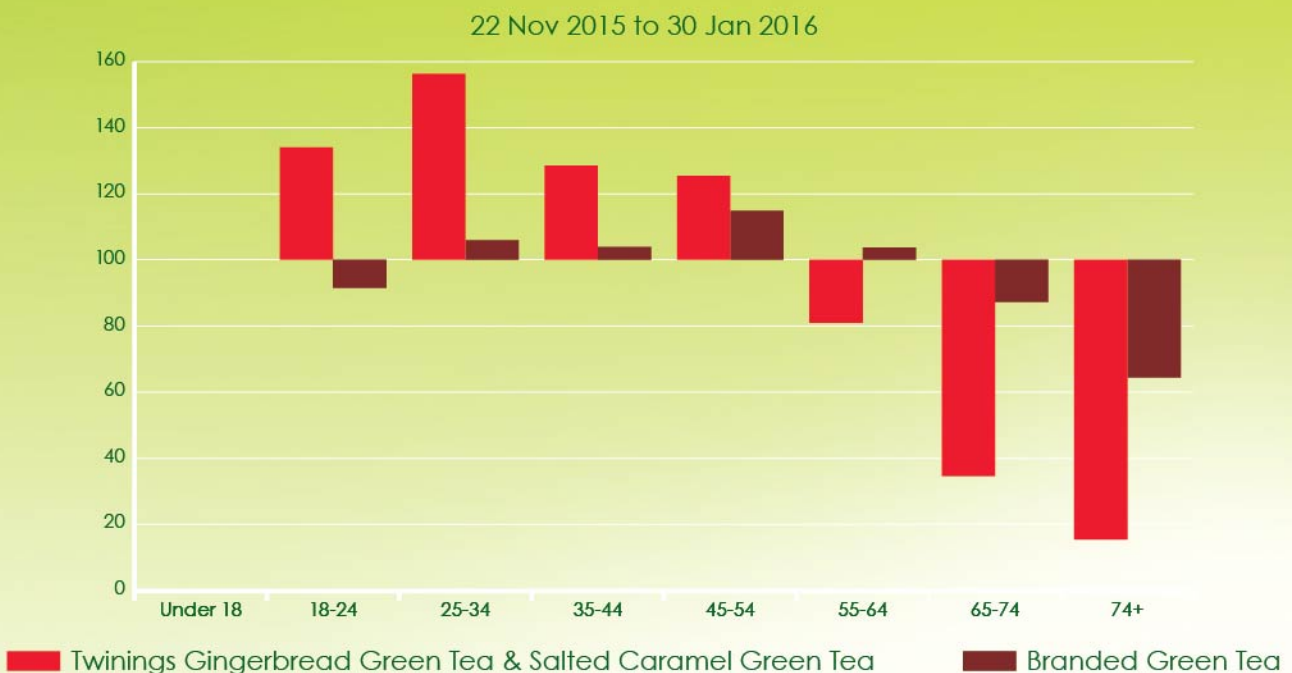
"Due to the scalable size of the brand and its strength in breadth, we are able to lead in these [premium tea] areas". **Twinings spokesperson**

Sweet Greens is also rapidly increasing in distribution, with **total coverage at 12.1% of the Twinings UK market** in April 2016, high for a new product to the UK market, especially considering its premium nature.

3. Attract a new, younger audience to green tea

Sweet Greens is attracting a younger profile consumer vs. core Green Tea, introducing a new consumer to the Twinings brand.

Sweet Green shoppers are younger than Twinings green shoppers.



Summary of Results (cont.)

This has younger demographic has assisted in increasing Twinings' social engagement overall. There had been 17k engagements on Facebook, with a 2.7 million reach, and a **6.4 million reach on Twitter**.

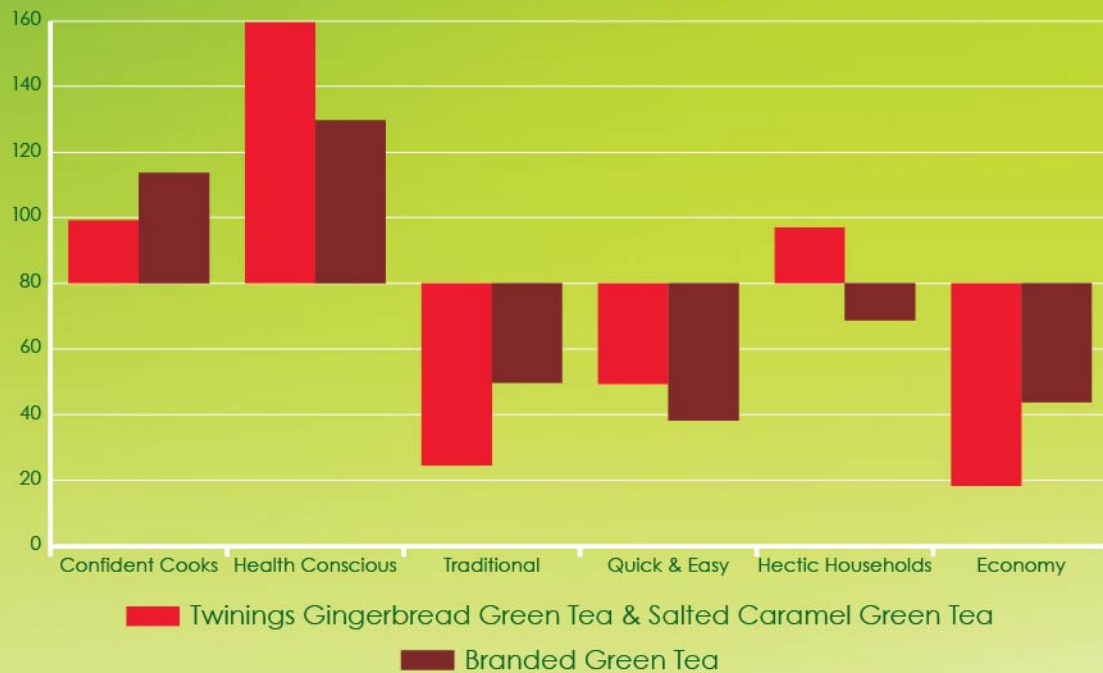
Sweet Greens has also successfully increased the spending patterns of its target market, with **much stronger loyalty** (>60% vs Infusions tier 2 range 27%) compared to total category (based on measuring the % of spend that a shopper spends on a particular range vs. category).

4. Communicate a more premium expression of green tea, suitable for health 'dabblers'

Sweet Greens is driving penetration in the green tea category and with a younger, more health conscious consumer. Sweet Green shoppers are health conscious so drinking sweet green for the benefit as well as taste.

6.4
million reach
on Twitter

22 Nov 2015 to 30 Jan 2016



Other Influencing Factors

There was limited additional marketing support for the launch of Twinings Sweet Greens, which indicates the range is **selling off the shelf based on design alone**. There was a small amount of social media and sampling support, but no promotional support or advertising campaigns took place.

Sampling resulted in over 50 mentions in blogs and articles, but no paid product placement.

The office-based sampling targeted 550k women, with each receiving 3 samples each, and a 50p discount coupon for their first purchase.

Twinings has also benefitted from a growing trend towards healthy eating, which has also seen people willing to spend more on health food and drink. The Nielsen's 2015 Global Health & Wellness Survey shows that 88% of those polled are willing to spend more on healthy food and drink.

Research Resources

- Mintel Research Agency data, quoted in 'Tea sales in decline as Britons desert black tea for more exotic brews', Greek Saffron, August 2015
- 'Hot beverage category report 2015', The Grocer, September 2015.
- Prices according to Brand Value Tesco 4 week data, w/c 20 August 2015
- ScanTrack Data, 12 week to week ending 30/04/16
- Nielson Sales Data, obtained through Twinings
- Nielsen's 2015 Global Health & Wellness Survey, as quoted in Forbes 'Consumers Want Healthy Foods—And Will Pay More For Them', February 2015

