



Category

Packaging: Branded Food & Drinks

Client

Wellness Foods

Design Consultancy

BrandOpus



brandopus

“ The redesign was integral in building consumer recognition of the Rowse brand. It has allowed the brand to successfully extend into new products and created a strong design structure for NPD. Loved by consumers and staff alike, the new design has successfully become an extension of the passion we feel for honey and embodies the principles of the Rowse company today.”

Kirstie Jamieson, Marketing Manager, Rowse



Executive Summary

Rowse was in a sticky situation. Although it was a £37m brand, and had a massive presence on the fixture, at brand level it had little saliency with very few customers even recognising that they were buying Rowse honey.

Rowse turned to BrandOpus to reconcile this contradiction, with a brief to redesign the identity and packaging to link the consumer's love of honey with the Rowse brand. By giving the brand a role and consumers a reason to buy into Rowse, BrandOpus allowed an increased price point of 17%², whilst retaining customers.

£1.7m

additional retail sales from NPD launches that the new design allowed²

11%

increase in distribution in major accounts²

6.4

seconds quicker for consumers to find Rowse on shelf versus old design³

28%

increase in consumer awareness of the Rowse brand²

Buzzing brand

Following the redesign, the brand now communicates a more positive message to consumers as producers of high quality natural honeys, with 46%¹ of consumers now recognising and recalling the Rowse brand.

Bizzy bees

On shelf, Rowse is now significantly easier to find and navigate, encouraging consumers to try the specialist honeys, which has led to a phenomenal £2.5m² increase in Manuka value sales.

Extending the hive

Additionally, the new brand architecture allowed Rowse to launch NPD adding £1.7m² additional retail sales to the brand, whilst major multiples have responded to consumer demand for Rowse resulting in 11%² increase in distribution.

£2.5m

increase in Manuka value sales²



Project Overview

Outline of Project

The brief was to:

- To create an iconic identity for Rowse that would allow it to behave an act like a brand leader, driving consumer awareness and saliency of the brand.
- To create a clear brand architecture to enable shoppers to navigate the range.
- To open up the world of honey by inspiring consumers to re-appraise their views and consumption of honey.

Description

The story of the nation's favourite honey brand started in 1938 when Tony Rowse turned his shed in Ewelme, Oxfordshire into an apiary. He loved it so much, he decided to turn his hobby into a business, forming the Rowse Honey Company in 1954.

Rowse travel the world to source their range of forty-five delicious honeys. From everyday to limited edition variants, Taste Adventures, Beekeeper's Select and Manuka, plus a new range, Supahoney, and a new product, Light & Mild, were also due to be launched further extending the Rowse offer. No other honey brand offers as much choice, however consumers found this complex portfolio difficult to navigate.

Overview of Market

The world of honey has changed immensely since Tony started beekeeping in 1938. The honey fixture is not populated with brands, due to the fact that honey is a natural, commoditised product. Other than Rowse and its main branded competitor, Gale's, private label dominated the market with a 48%² market share.

Although the honey market is worth £102m with 4.7%² year on year growth, it was facing a series of commercial pressures. A 10% rise in raw honey prices had hit the market, caused by bad harvests and a declining bee population⁴. Furthermore, the price of imported honey (which accounts for 90% of the market) was destabilised by currency fluctuations⁴. Not only this, but packaging overheads were also affected by the rising cost of glass⁴.

The result was a lot of pressure on branded honey. With no reason to choose Rowse over lower cost alternatives, consumers were turning to competitors to quench their honey thirst, demonstrated by the 12%⁵ rise in sales enjoyed by private label.

Project Launch Date

June 2010



Project Overview Cont.

Outline of Design Solution

When approaching the brief to redesign Rowse, BrandOpus recognised that it was important to stay within the visual realms of honey. Moving too far away from the recognised norms could risk alienating and confusing consumers.

In order to do this, BrandOpus picked up on the generic elements distinctive to honey and developed them to become ownable to Rowse. The hexagonal shape of both the structure and the label was adapted by softening the angles, allowing it to become Rowse's own take on the honeycomb. This also created integration between the label shape and the jar structure.

BrandOpus also personalised another generic honey device, the bee. When you look closely, the letters 'TR' become visible in the wings - another nod to the founder, Tony Rowse's love of beekeeping, and the brand's continued passion for honey.

The handscripted typography and dotted lines on the label elude to the origins of the Rowse company, harking back to Tony Rowse and his handwritten labels of yesteryear.



Project Overview Cont.

Beyond Rowse's core honey, it was vital that the design would work across several different ranges. In Speciality, BrandOpus introduced an illustration onto the front label, evoking the provenance of the honey, whilst on the back label there are tasting notes, demonstrating the diversity of the flavours available in the range. This challenged the consumer's narrow perception of honey, by opening up a world of Rowse to discover and explore.

For Manuka, the identity was adapted to reflect its premium price point by introducing a smaller label and a black background, whilst the activity rating accentuated in silver highlights its medicinal benefits.

As part of the redesign a new range was launched- a blend of pure honey and Manuka. This range was named Supahoney to reflect the beneficial health properties of the Manuka content. The use of the double hexagon device reflects the nature of the blend whilst providing a visual device for communicating the flavour variants.

The Beekeepers Select range is locally sourced from select honey farms in England and Scotland, with each beekeeper known personally to Rowse. The design features the established hexagonal front label, which was created with a rustic brown paper effect, reflective of a personal, artisanal touch and illustrates Rowse's support of British apiaries.

Following the redesign, the clear brand architecture across the wider portfolio allows ease of navigation. Uniting each range with consistently used devices, whilst allowing differentiation to illustrate the differences in each product offer, the new design encourages to the consumer to discover the world of Rowse honey.



Summary Of Results

17%

increased price point that the redesign allowed²

Relistings

in Waitrose and Morrisons following the redesign

x4

Rowse Manuka growing 4x faster than Manuka segment²

57%

of consumers prefer the new packaging¹

Increases in Sales

- New products Supahoney and Light & Mild which launched at redesign added £1.7m² sales to the Rowse brand
- Rowse Manuka enjoyed an increase of £2.5m (35%²) in value sales following redesign

Increases in Price Point

- The redesign allowed Rowse to increase its price point by 17%², in a period where decreases in competitor pricing were witnessed

Increases in Market Distribution

- The redesign has partially enabled Rowse to enjoy 11% increased listings across major multiples²
- Since the redesign Rowse have won back listings in Morrisons and Waitrose

Range development

- The brand architecture redesign allowed Rowse to launch 3 new SKUs across the Light & Mild and Supahoney ranges
- Rowse embraced the new design, and BrandOpus were subsequently tasked to apply the identity to branded touchpoints including company signage, stationary and lorries

Increases in Market Share

- Rowse is driving the manuka market, by growing 4 times² faster than the category following the redesign
- Rowse Manuka value and volume market share have both increased to 70%²

Increases in Brand Saliency

- The new design is significantly easier to find on shelf, with consumers able to locate their favourite honey 6.4 seconds faster³
- Brand recognition increased significantly, with 46%³ of consumers recalling Rowse, a 28%³ improvement on the previous design

Changes in Customer Perception

- Consumers love the new design, with data showing a consistent preference for the new packaging¹
- "I particularly liked the jar design - I intend to keep and reuse it for something else!"⁵
- "Attractive jar and looked appealing"⁵
- "Really pretty jar"⁵
- "The glass jar was very pretty with the little bees... I will reuse it"⁵
- "If you had visitors for the weekend this is the honey you would get out"³



Sources & Other Influencing Factors

Sources

- ¹ Millward Brown, consumer design preference tracking report, June 2011.
- ² Nielsen, 52 week Scan Track to 11.06.11
- ³ BrainJuicer research data, January 2010
- ⁴ SymphonyIRI Group data, first published in The Grocer 08.01.11
- ⁵ Mumsnet sticky thread, active 28.02.11 to 06.03.11
- ⁶ Lets Talk Fresh, October 2009

Other Influencing Factors

- A 7 week TV & digital campaign ran from February 2011, but this was 8 months after the redesign.
- Price promotions ran from 09.02.11 to 29.03.11, also 8 months after the new design hit the shelves.

