

Cassies 2005 Cases

Brand: Twix

Winner: Off To A Good Start—Certificate of Excellence

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Crossover Notes: All winning cases contain lessons that cross over from one case to another. The notes for this case are as follows, and are attached. The full set can be downloaded from the Case Library section at www.cassies.ca

- Crossover Note 2. Brand Truths.
- Crossover Note 6. Should the product be improved?
- Crossover Note 7. Fighting for the Same High Ground.
- Crossover Note 9. Turnarounds.
- Crossover Note 19. Great minds think alike.

To see creative, go to the Case Library Index and click on the additional links beside the case.

EXECUTIVE SUMMARY

Business Results Period (Consecutive Months): October 2004 – May 2005.

Start of Advertising/Communication Effort: September 20, 2004.

Base Period for Comparison: Calendar 2003.

Twix had not been advertised for 25 years, but had a small but loyal following. With the help of a humorous TV ad designed to resonate among young adults, Twix achieved significant growth while the category as a whole declined. **Crossover Note 9.**

SITUATION ANALYSIS

a) Overall Assessment

The chocolate bar category is incredibly competitive, with more than fifty players duking it out for hard-won percentages of market share. Achieving significant growth is difficult to say the least. Even more difficult is to win a place in the top ten ranking. In 2003, only two Effem brands, Mars and Snickers, were there (6th and 8th respectively).

Chocolate Bar Rankings (Value Share)

	2003
Kit Kat	1
Aero	2
Coffee Crisp	3
Caramilk	4
Reese	5
Mars	6
Oh Henry	7
Snickers	8
Smarties	9
Mr. Big	10
Crispy Crunch	11
Kit Kat Chunky	12
Crunchie	13
Wunderbar	14
Twix	15

Source: ACNielsen – Impulse Channel

Effem, however, had aggressive goals: to have four chocolate brands in the Top 10 by 2007. It chose to champion Twix first, for three reasons:

- Tracking study data indicated Twix had strong potential
- Twix could fill a portfolio gap
- Twix offered the chance of true competitive differentiation

Tracking Study Data

A November 2003 Effem study showed that Twix had strength. Among the 12-24 group, its top of mind brand recall was only 2%. However, the past 7-day purchase score was 9% (equal to the #7 ranked bar, Oh Henry) and the bought most often score was 3%. Those who knew Twix liked it a lot.

Given that chocolate bars are all about impulse, this was a huge opportunity. If we could increase Twix's awareness, we could encourage trial. And if we encouraged trial, we believed people would like Twix enough to keep buying it.

Ability to fill a portfolio gap

Twix showed the greatest promise with "transitional teens," with a bulls-eye age of 20. This was older than the base for Mars and Snickers, giving Effem a way to reach a broader audience. Additionally, Twix had significantly higher usage with females 12-24, giving Effem a way to expand its Mars and Snickers male-dominated base. Finally, we hypothesized that Twix could compete with the two "break" bars: #1 ranked Kit Kat, and #3 ranked Coffee Crisp.

True Competitive Differentiation

Not only did Twix have unique ingredients, cookie, caramel and chocolate, it also came in a two bar format. **Crossover Note 6.**

b) Resulting Objectives

Use Twix to widen Effem's consumer base, and to help achieve the goal of four top ten brands by 2007.

INSIGHT AND STRATEGY

Twix's positioning was for all intents and purposes undefined, in that it had not been advertised for over 25 years. It had garnered display on the backs of other brands, and had grown slowly over time, based only on that. This meant that Twix's positioning was ours to create. We set out to find what would make Twix relevant to "transitional teens."

Target Insight: In focus groups our target revealed that they are caught between teenhood and young adulthood. They are working part or full time and are getting their first real taste of responsibility and the independence that it brings. But when they take a break from the new seriousness of their lives, they want to enjoy it to the fullest, and to extend it as long as possible. **Crossover Note 19.**

Product Insight: When we asked users why and how they ate Twix, they said it was a fun treat. The chocolate, caramel and biscuit encouraged them to eat it in playful ways. They also said they would eat it as an alternative to Kit Kat and Coffee Crisp (confirming our hypothesis that it should be positioned as a "break" bar against these two competitors). **Crossover Note 7.** But, Twix's most appealing characteristic was the fact that it had two bars. This made people feel that it lasted longer, and prolonged the pleasure of eating it.

Strategy: This comes from the intersection of consumer and product. Our target wants to enjoy their break to the fullest, and as long as possible. Twix offers a delicious mix of ingredients (enjoyment) and a two bar format (an experience that can be prolonged).

Proposition

Twix's 2 bars of soft caramel and cookie crunch are so good you can make your break last even longer. **Crossover Note 2.**

EXECUTION

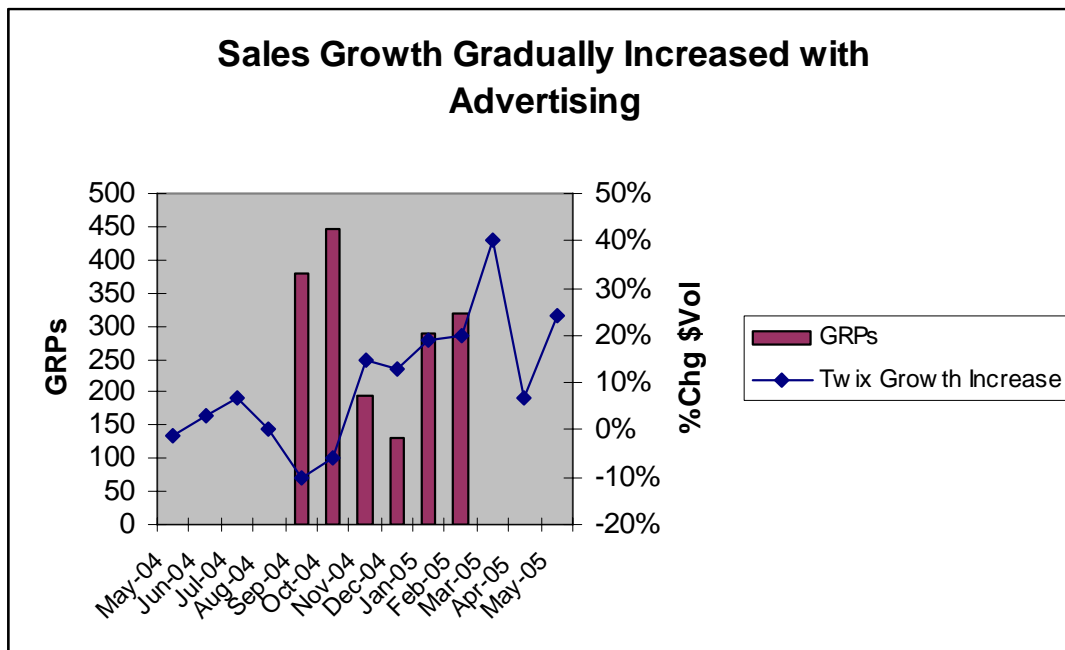
The creative brought the strategy alive through a paradox. When something is really good, you *try* to save part of it for later. But can't, because it is irresistible.

“Co-Worker,” shows a young office worker asking a colleague to hold on to the other half of her Twix bar so she can enjoy it later. Seconds later, she is overcome with desire for the bar and, hilariously, tries to retrieve it from her friend who is stalwart in his mission to guard it.

The campaign launched in September 2004 and ran without interruption until February 2005. Given the importance of awareness, we chose TV as our only medium.

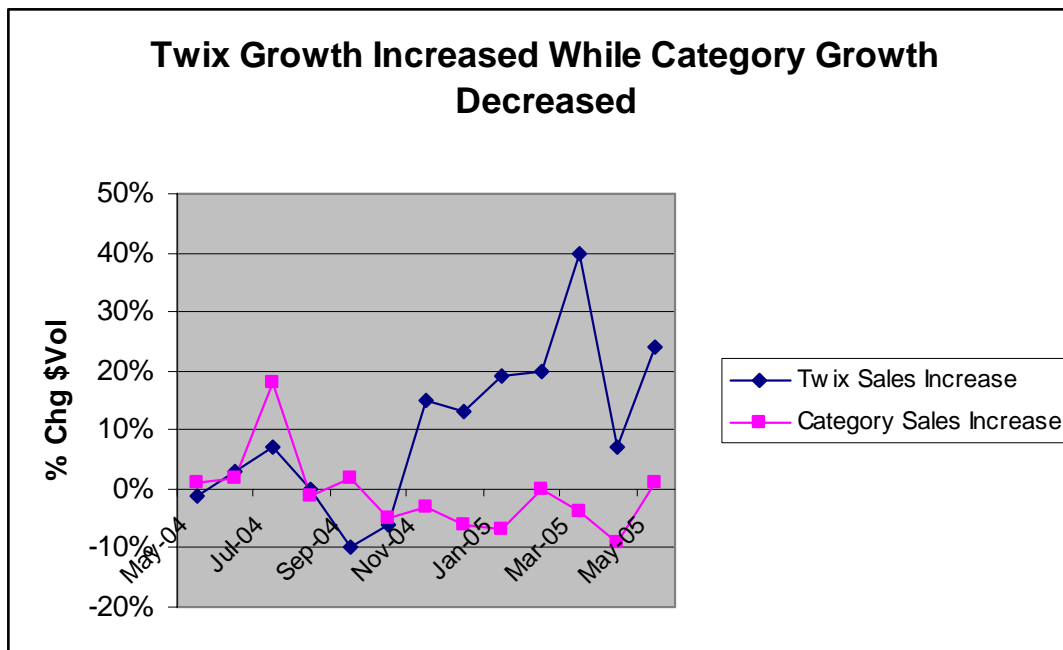
BUSINESS RESULTS

After two months on air, Twix sales growth began to increase, to +15% in November. Growth increased steadily over the next few months, culminating in a 40% increase in March 2005. Net growth across the Results Period was 17%.



Source: ACNielsen – Impulse Channel

This was impressive given that the overall category saw significant declines over the same period:



Source: ACNielsen – Impulse Channel

Finally, Twix jumped five places to achieve the # 10 ranking. Effem's ambition to dominate the top ten took its first step towards being realized. In less than a year,

Chocolate Bar Rankings (Value Share)			
	05/02 - 05/03	05/03 - 05/04	05/04 - 05/05
Kit Kat	1	1	3
AERO	2	4	6
Coffee Crisp	3	6	4
Caramilk	4	3	2
Reese	5	2	5
Mars	6	5	1
Oh Henry	7	7	7
Snickers	8	8	8
Smarties	9	10	11
Mr. Big	10	9	9
Crispy Crunch	11	11	13
Kit Kat Chunky	12	12	16
Crunchie	13	14	12
Wunderbar	14	13	14
Twix	15	15	10

Source: ACNielsen – Impulse Channel

CAUSE & EFFECT BETWEEN ADVERTISING AND RESULTS

A number of indicators suggest that advertising was the key driver:

“Co-Worker” in creative pre-testing:

	All 19-20 year olds	vs. Norm
Brand Association	78%	85 th percentile
Distinctiveness	60%	65 th percentile
Would Enjoy Watching	79%	90 th percentile
Purchase Intent	62%	81 st percentile

Unaided Message delivery:

Irresistible 69%

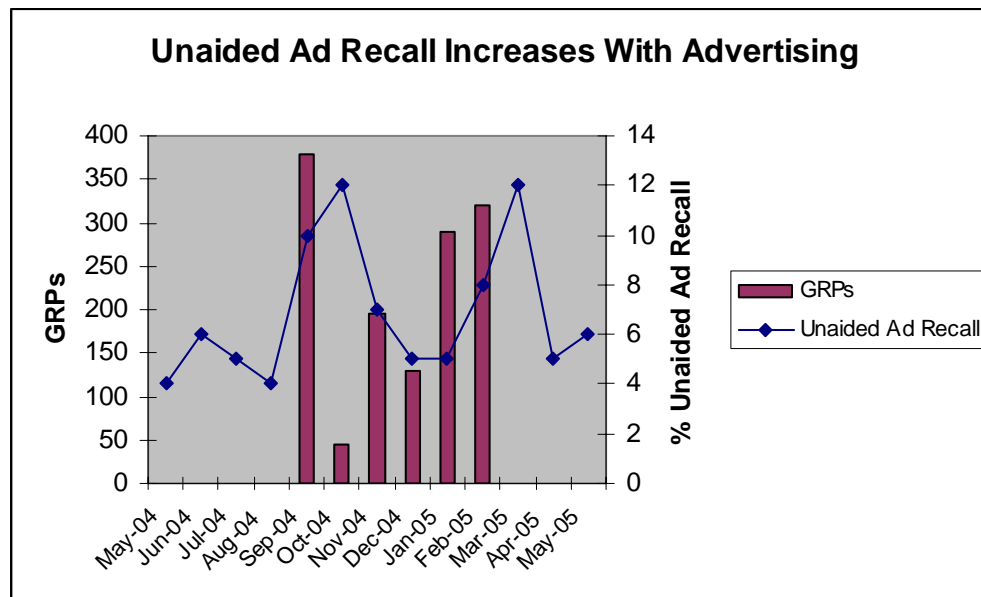
Aided:

Twix is great tasting 85%

Tastes so good you’ll try to save
the second bar for later 63%

Source: Camelford Graham AdLab

Unaided ad recall increased dramatically, jumping from 4% to 12%:



Source: LLS Tracking

Notably, Twix’s score was just 2 points shy of Kit Kat, one of the top 3 brands.

Brand linkage was exceptionally strong:

Based on Effem’s continuous tracking, “Co-worker’s” brand link score among 20-24 year olds was 74%. This is among the highest for ads currently tracked by Effem Inc.

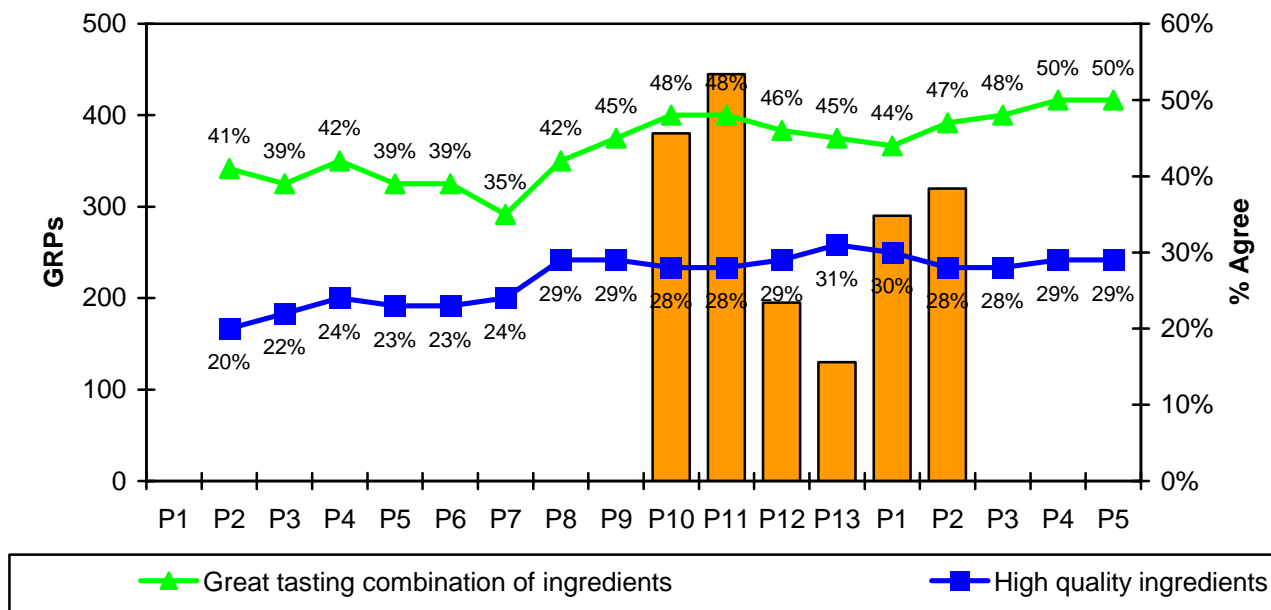
Strong Messaging in Tracking:

- Irresistible 47%
- Is good when I need a moment to myself 37%
- Good combination of ingredients 50%

Base: 20-24 year olds (Source: LLS Tracking)

Taste Equity among 20-24 year olds

This is strengthening over time, and clearly appears to be driven by the advertising.



(Source: LLS Tracking)

Ruling out other activity as a contributor to sales growth

Twix's media spend, averaging 73 GRPs a week from September to February, was about average for the category. The only significant marketing activity was:

- We offered a "pre-pack" of Regular Twix and Twix Peanut Butter to get the display.
- We focused our merchandising on Twix in early 2005. We have these display drives brands anyway, but it gave us the opportunity to get Twix-focused POS up at retail.

However, although these initiatives worked concert with the advertising, neither is significant enough to have driven such growth on their own.

End of Case. Crossover Notes follow.

INTRODUCTION TO CROSSOVER NOTES — CASSIES 2005

[For Twix]

Crossover Notes have been going for several years, and now run to 28 pages.

We used to attach a full set to all cases, but to save a few trees, we now include only the Notes particular to any case.

The idea of Crossover Notes occurred to me while I was editing Cassies 1997.

I was a consultant by then. Before that I had reached the category manager level at P&G (what they quaintly called the Associate Advertising Manager). I had then clambered up the ladder at O&M, eventually becoming President and later Vice Chairman—both in Toronto. P&G and O&M were both passionate about “lessons learned,” and so was I. In those days (it seems hard to believe now) we felt rushed off our feet. But we did have time to study if campaigns were working or not, and come to conclusions about why.

There are lessons, like gold dust, in all the Cassies cases. So in 1997 I decided to extract them. This started with bite-sized footnotes about lessons that “cross over” from one case to another. And the idea kept growing. It is still anchored to winning cases, but I also draw on other thinking for more complex issues.

You can use Crossover Notes in two ways. Although they didn’t start out as a crash course in advertising, they are worth reading as a whole. You can also dip into them selectively. The headings on the next page will help you choose.

I’ve tried to be even-handed on controversial issues, but here and there you will sense my point of view. For this I thank the Cassies for not editing their Editor.

We now have over 150 published cases. They’re a growing body of experience. I hope I’ve helped pass some of the learning on.

David Rutherford

Toronto: December 2005.

For advice on brand-building see *Excellence in Brand Communication*—authored by leading Canadians from across the marketing and advertising spectrum.

It is published by the ICA. See www.ica.adbeast.com.

INDEX OF CROSSOVER NOTES FOR CASSIES 2005

All Cases	Twix
1. What a Brand Stands For.	
2. Brand Truths.	✓
3. Core Equity versus Price & Promotion.	
4. Business Strategy dictated by the Brand Positioning.	
5. The Total Brand Experience.	
6. Should the product be improved?	✓
7. Fighting for the Same High Ground.	✓
8. Classic Rivalries.	
9. Turnarounds.	✓
10. Conventional Wisdom—should it be challenged?	
11. The Eureka Insight.	
12. Changing the Goalposts.	
13. Immediate vs. Long-Term Effect.	
14. Refreshing a continuing campaign.	
15. Baby with the Bathwater.	
16. When a campaign stumbles.	
17. Turning a liability into a strength.	
18. Keeping it Simple.	
19. Great minds think alike.	✓
20. Emotional versus Rational.	
21. Likeability.	
22. Humour in a Serious Category.	
23. Problem versus Solution.	
24. Tough Topics.	
25. Brand Linkage (when should the brand name appear).	
26. Awareness Alone.	
27. Share of Mind, Share of Voice, Spending.	
28. Media Learning.	
29. Pre-emptive Media.	
30. Reach and Frequency versus Large-Space Impact.	
31. Transcending Advertising.	
32. Internal Marketing.	
33. Changing the Target Audience.	
34. Longer and Broader Effects, and A Closing Thought.	

The Notes for this case are marked ✓ and come next.

TWIX. CROSSOVER NOTES. CASSIES 2005.

2. **Brand Truths.** Successful advertising (in fact all successful communication) resonates with its audience. As a marketer, you may want people to believe that you have the best-tasting coffee, but simply saying, “I have the best-tasting coffee” will not usually get the resonance you need. One school of thought is to say the obvious as loudly and crassly as you can. We could call it the Bad Boy syndrome. Another has led to the idea of Brand Truths. These operate on a deeper level than simple claims. One of the top UK agencies described it as “we interrogate the product until it confesses its strength.”

I was once the Brand Manager on Tide, and when we were asked, “What does Tide stand for” we said, “Superior cleaning. Not whitening. Not Brightening. Not Fabric Care. Superior *cleaning*.”¹

Superior cleaning was the religion on Tide, and Tide delivered, despite the cliché that all detergents are alike. But this was only a glimmer of the Brand Truth. If you “interrogated” Tide the most startling truth was the *intense belief* of Tide users. This came to life in the immensely successful “Two for One Swap” campaign. Hidden cameras watched as women who had just bought Tide were offered two boxes of another detergent in exchange. They adamantly refused, delivering off-the-cuff endorsements that no copywriter could ever have come up with. The campaign ran for years, and only came to an end because of its success—women knew it so well that the “candid camera” interview became impossible. Many Brand Truths are also insights, and for a list see [11. The Eureka Insight](#) and [12. Changing the Goalposts](#).

6. **Should the product be improved?** Some years ago it was an axiom that your product, functionally, had to have an advantage over competitors. In packaged goods, it was considered foolish to launch a new brand unless it was a blind test winner over its major competitor—ideally overall, and at least for a desirable benefit.²

That thinking has shifted, and it’s commonly said today that it’s impossible to sustain a functional advantage; that competition can match you in a matter of weeks or months, or even days with some technological products. This has had a paradoxical effect. Some people are almost frenzied in their desire to keep their product (or service) improving—fearing that if they don’t, they will be left behind. Others go into a slipstream mode—letting others face the headwinds, then matching what they do.

John Philip Jones (the Professor of Communication at Syracuse University) is vocal on this, saying that we do *not* live in a parity world—that imitators may try to match the innovators, but they often don’t quite succeed. His view (and I share it) is that it is dangerously complacent to assume that functional parity is the way of the world.

¹ P&G defined “what the brand stands for” by a document they called The Creative Strategy. In those days, if anyone even dreamt that the Tide Creative Strategy should include whitening, brightening etc. it was seen as an offence against all that was holy.

² There was still the “pre-emptive” possibility i.e. staking out a convincing claim for a parity benefit before anyone else did. But, in general, having a product edge was seen as important

Another danger is the belief that “marketing” can compensate for a weak product. This led to the debacle a decade or two ago when North America systematically under-invested in product. The Japanese, and later the Europeans and others, did exactly the opposite—and carved out the market shares we see today.

There’s no question that the cost to upgrade can be daunting. Nevertheless, many cases reflect the investment. For example:

- Listerine in Quebec in Cassies II, with an improved taste.
- Chrysler in Cassies III, with the NS Minivan.
- Pontiac Sunfire in Cassies III.
- St Hubert in Cassies 99, upgrading their entire operation.
- Sunlight in Cassies 99, with improved cleaning.
- Home Furnace in Cassies 2002.
- Lipton Sidekicks in Cassies 2002.
- Irving Mainway Coffee and Source Yogurt in Cassies 2003.
- MINI in Cassies 2003.
- Motrin in Cassies 2003, adding stronger skus.
- VodKice in Cassies 2003, remodelling the Boomerang portfolio.
- Cirque du Soleil in Cassies 2004, by adding Zumanity to their portfolio.
- Kit Kat in Cassies 2004, keeping Original the same, but launching Chunky.
- Toyota Sienna in Cassies 2004, with multiple upgrades.
- Coricidin II in Cassies 2005 (Re-launching a new version, after the original brand had been withdrawn)
- Penaten, Hubba Bubba, Stouffer’s Bistro, and Juicy Fruit, all launching line extensions in Cassies 2005.

Still others achieve their gains with no change—though the existing product is in all cases good, and sometimes better than the competition. These cases include:

- Crispy Crunch and Pepsi Quebec in Cassies I.
- Oh Henry! in Cassies II.
- Buckley’s, Dove, and Philadelphia Cream Cheese in Cassies III.
- Eggs, becel, and Wonderbread in Cassies 99.
- Kraft Dinner and Lipton Chicken Noodle in Cassies 2001.
- Campbell’s, Diet Pepsi, Listerine, and Pro•Line in Cassies 2002.
- All the major beer winners over the years.
- Aero, Dodge SX 2.0, Familiprix, Super 7, in Cassies 2003.
- Cottonelle and Milk in Cassies 2004.
- Crescendo, Jergens Ultra Care, Whiskas, Twix, Energizer Lithium, Moores, Familiprix in Cassies 2005.

Technology cases usually have improvements. Services (e.g. Desjardins, Gaz Metro, Réno Dépôt in 2004) usually improve as part of the “total brand experience.” Some cases (e.g. Clearnet in 2001 and Lipton Sidekicks in Cassies 2002) say that if your functional advantage is going to be matched, you’d better develop an advantage through brand personality/character/equity. There is no cookie-cutter answer. Each situation has to be assessed on its merits.

- 7. Fighting for the Same High Ground.** Some people feel that a brand should not fight for high ground already held by a competitor. It comes out as “our positioning has to be unique.” This sounds so right, how can it be wrong? Consider Cassies III. Lever wanted to pre-empt the arrival of P&G’s Oil of Olay bar from the US, and decided to kick-start Dove sales via new advertising. They had a spectacular product demonstration. Dove is not a soap, and when it is subjected to litmus paper, the colour does not change. With soaps—including Ivory—the paper turns an ugly blue. But this is essentially a mildness demonstration, and Ivory owned mildness. Some heavy hitters in international management (at the client and agency) predicted disaster if Dove took on Ivory. But Dove attacked anyway. At the start of the case, Dove and Ivory had the same dollar share. Four years later Dove’s dollar sales were up 73%, and Ivory had dropped to half of Dove’s dollar share.

And how do you decide whether to attack or not? On winnability. Yes, Ivory held the mildness position, but with “litmus” Dove had a superb claim on that territory.

The key is how you think about distinctiveness. It does *not* have to come from positioning. Consider Duracell and Energizer. Duracell was the first brand to stake out “lasts longer,” and Energizer (believing they could not attack this high ground) languished in other territory for years. Eventually they decided to attack, and the Energizer Bunny has been going and going ever since. Both brands have the high ground positioning. They get their distinctiveness from execution.

One last variation on this theme. Sunlight wanted to attack Tide on cleaning, but decided that a frontal assault on such a powerful brand would fail. They still attacked, however, but they re-defined “clean” as the joy of getting dirty. This brilliant insight helped them win the Grand Prix in Cassies 99.

I’m not saying you should always attack a competitor on the high ground. There are many Cassies successes based on side-stepping or re-defining the high ground. Cottonelle, Desjardins, Gaz Metro and Réno Dépôt did this in Cassies 2004. Cruisin’ to Win, Crescendo, Whiskas, Twix, Moores and Lotto 6/49 did this in Cassies 2005. Even so, I think the high ground is still one of the first places you should look.

9. Turnarounds. There are a number of these in the Cassies:

Cassies I

- Crispy Crunch. Molson Canadian.
- Pepsi. Quebec.

Cassies II

- Listerine. Quebec.
- Oh Hungry? Oh Henry.

Cassies II

- Dove. "Litmus."
- Molson Canadian. "I AM."
- Philadelphia Cream Cheese.

Cassies 99

- becel. "Young at Heart"
- Eggs. Wonder Bread
- Sunlight. "Go Ahead. Get Dirty."

Cassies 2001

- Kraft Dinner.
- Lipton Chicken Noodle.

Cassies 2002

- BMO Quebec.
- Campbell's Soup. Listerine.
- CFL. Pro•Line.
- Easter Seals Relay.
- Sleeman Quebec.

Cassies 2003

- Aero. Bait Cars.
- Crown Diamond Paint.
- Dodge SX 2.0.
- Motrin.
- Pro•Line.
- Super 7.
- Université de Montréal.
- VodKice.

Cassies 2004

- Cottonelle.
- Gaz Metro.
- Kit Kat.
- Milk (Quebec and Prairies).
- Toyota Sienna.

Cassies 2005

- Crescendo.
- Energizer Lithium.
- Toyota Tacoma.
- Eggo French Toast Stix.
- Twix. Hubba Bubba. Juicy Fruit.
- Coricidin II.
- Moores and Harvey's.
- Quebec Lotto 6/49.
- Pepsi – Quebec and Quebec Milk.

19. Great minds think alike. Strong brands always differentiate themselves. That said, the underlying thinking does not necessarily have to be totally unique. In Cassies 2002, Diet Pepsi, Five Alive and toronto.com all came to similar conclusions about the young men i.e. they are media savvy, cynical about marketing, feel responsibility looming, and don't want to give up on the best and craziest parts of being young. Fido and Clearnet in earlier Cassies both identified a confused and intimidated public. The car cases in Cassies 2003 (Dodge SX 2.0, MINI, and Toyota Matrix) all had similar conclusions about the joy of driving. Butter in Cassies 2005 and Eggs in Cassies 99 uncovered similar ideas about "natural." Designer Depot and K&G stores in Cassies 2005 came to similar conclusions about the quality/price shopper. Twix, looking at 20-somethings, found attitudes similar to what Diet Pepsi and Five Alive had found. See also *7. Fighting for the Same High Ground*.

End of Twix Crossover Notes.