

OLD & NEW SUPERBRANDS: How have Britain's biggest consumer names won - and maintained - their status as Superbrands?

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They are consistent, not schizophrenic. They are innovative, trustworthy, forward-looking, agile. They do not stretch too far. But above all, Superbrands need to fight hard to retain their positions.

So says the 12-man judging panel for Consumer Superbrands 2003, launched today (Thursday) by The Brand Council and previewed exclusively by Marketing. The book explores the history, development and achievements of many of the strongest brands in Britain, examining how they have made it to the top and how they have managed to stay there.

Many of the 74 brands that are featured in the book are stalwarts of its pages, proving that they can evolve to withstand consumer flux, market downturns and bitter competition to retain their positions. But 22 are new entrants, having come to the attention of the judges by pushing their way to the top of their sector on the strength of sales, innovative thinking and ground-breaking marketing.

Here, we examine three brands that continue to grace the pages of Consumer Superbrands - M&S and Persil have featured since 1995 and Virgin since 2001 - and three new entrants.

MARKS & SPENCER: SUPERBRAND SINCE 1995

Marks & Spencer has fought back from a difficult period to regain a hold on the high street. In November 2002, it posted a 7.9% jump in overall sales and a 41.1% rise in operating profit. Chairman Luc Vandevelde said it had 'moved from securing to sustaining the recovery'.

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A restructured balance sheet enabled it to return pounds 2bn to shareholders, while laying the groundwork for future growth.

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Another key aspect was the 'Perfect' campaign, which promoted the chain's high-quality, everyday wardrobe staples while stressing their affordability.

In line with the activity, the company worked on improving the fit of its clothing, based on a survey of 2500 female customers.

M&S began to revive its stores, presenting a more contemporary face.

In 2002, David Beckham agreed to lend his name and image to DB07, a clothes range for four- to 16-year-old boys.

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- M&S sells more than 20 million pairs of knickers every year.
- One in five men own an M&S suit; one in six own an M&S shirt.
- During the festive season, shoppers buy 28 million mince pies.

PERSIL: SUPERBRAND SINCE 1995

Seventeen million washes are carried out in the UK every day - that's almost seven wash loads a week for the average UK household. More

than one-quarter of these are done with Lever Faberge's Persil, the UK's top laundry brand, with nearly 30% of the market.

Its place in the country's cupboards has been maintained by continuous innovation throughout its 94-year history.

Persil was the first brand to bring tablets onto the market and now leads the sector. Persil Capsules, which was actually third to market, now leads the capsules sector, with sales worth more than pounds 28.1m in its first eight months. After its first year, one in five people in the UK had bought Persil Capsules, with the product outselling its nearest competitor by two to one.

Persil was the first detergent to be advertised in the press, in 1910, and was also the first detergent to be advertised on television, in 1955.

Today, Persil focuses on creating relationships with its consumers. In September 2002, the brand unveiled the world's biggest picture mosaic - the culmination of a three-month-long drawing programme in schools and playgroups - to mark the start of its 'Get Creative' initiative.

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The Virgin brand is famous the world over for being prepared to take on established businesses and win. Virgin positions itself as a consumer champion, challenging big players in the sectors in which it operates by offering customers better value and service than the competition.

Owing to Richard Branson's high profile - built up by stunts from his around-the-world balloon trips to dressing up as a bride to launch Virgin Bride - and the innovative nature of the products and services, Virgin has always had high levels of brand recognition.

The founder's activities have made such an impact that they resonate across the whole group and every sub-brand benefits. Branson's autobiography, *Losing My Virginity*, published by Virgin Books, has been one of the best-selling business books in the world.

Branson's career began at the age of 17 with the launch of *Student* magazine in 1968. Two years later he set up a small mail-order record retailer that undercut the big stores' prices. In 1971, Branson and his cousin, Simon Draper, established Virgin Records.

In 1972, at least one store opened every month and by the end of the year there were 14 outlets. Virgin Records rapidly became the biggest independent record company in the country, signing acts such as the Sex Pistols.

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Specsavers' own lens manufacturing laboratories - two of the biggest in Europe - mean that it can supply the latest high-tech lenses at high volume and low cost.

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With projected sales in 2002 of pounds 500m, Specsavers' has achieved continuous and sustained organic growth, despite a slowdown in the retail economy.

The current market for eyecare products and services is estimated at more than pounds 2bn, with just under half provided by small independent opticians.

Specsavers was the first optician to advertise its products and services on television and still spends more on TV than any competitor - more than pounds 14.5m in 2002 (ACNielsen Media Research). Specsavers' campaigns, produced by an in-house creative team, regularly appear in Marketing's Adwatch.

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First registered in 1866, the distillery continues to craft old-time Tennessee whiskey the way Mr Jack did 140 years ago and remains true to its founder's straightforward motto: 'Each day we make it, we will make it the best we can'.

Jack Daniel's Old No. 7 Tennessee sour mash whiskey, owned by US company Brown-Forman, is the leading imported whiskey brand in the UK, both in terms of volume and value.

Between 1997 and 2001, consumption of blended whiskies fell by 7%, from 35% to 28% of adults, while consumption of premium malts fell by 3%, from 21% to 18% of adults, according to BMRB and Mintel.

Consumption of imported whiskies such as Jack Daniel's, meanwhile, has remained constant at 11% over the past four years.

Recent buoyant sales of imported whiskies have been largely spurred

by the success of brands such as Jack Daniel's and its appeal to younger drinkers. The typical Jack Daniel's drinker is a man in his mid-20s, and the brand targets 18- to 24-year-old male students and young workers. This highly social group expects a lot from life and has a 'live for today' attitude.

The brand is also redoubling its efforts to retain 25- to 44-year-olds.

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Last year UK consumers spooned their way through a record two billion pots of yoghurt - enough to fill more than 200 Olympic-size swimming pools.

Sales leapt pounds 36m to pounds 698m in 2001, making yoghurt one of the fastest-growing food sectors, according to ACNielsen.

Muller, the third-biggest grocery brand in the UK, currently holds a 40% share of the yoghurt market. Since its introduction to the UK in 1987, Muller has built retail sales in excess of pounds 300m, with 17 different product lines and 65 product variants.

In one record day in 2001, the brand sold 4.7 million pots of yoghurt - exactly equal to its first full-year sales 14 years ago. In the same year, Muller invested pounds 55m in a state-of-the-art extension to its Market Drayton factory in Shropshire to double production capacity to more than two billion pots a year.

In keeping with the brand's philosophy of innovation, Muller launched a number of products in 2002. The most recent was Muller Corner Squeezers, the twin-tube format containing Muller Corner yoghurt and fruit sauce, in September 2002. It is aimed at children and teenagers

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SUPERBRANDS 2003 Abbey National Adidas Anadol* Andrex Asda* Ask Jeeves Avia BBC Black & Decker British Airways BT Classic FM Coca-Cola Comfort* Direct Line Duracell EasyJet Eurostar Evian Financial Times Firstdirect Gillette Haagen-Dazs Heinz Hertz* HMV Huggies* Intel* Jack Daniel's* Jaguar* Johnnie Walker* Kellogg Kleenex Kodak* Land Rover Lastminute.com Lemisp* Melleers* Marks & Spencer Mars bar McDonald's Michelin Mr Kipling Muller* Nivea Nurofen Oxfam* Q&Q Persil PG Tips Philips* Pret A Manger Quaker Oats* RAC Royal Doulton Royal Mail Schweppes Sellotape Sherwood's* Shell Specsavers* Speedo Starbucks* Tesco Telfey The National Lottery The Sun The Times* Typhoo* Virgin Virgin Atlantic Wall's Waterford Crystal* Yellow Pages *New Superbrands

- More than 50,000 Muller Corners are consumed every hour in the UK.

- Muller uses 500,000 litres of milk every day, all of it sourced from within a 35-mile radius of its Shropshire factory.

- The Muller brand now has 71% penetration of all UK households (ACNielsen).

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Anadin Is Crowned A Superbrand

BRAND: Anadin

TARGET MARKET: Retailers & Consumers

UNIQUE SELLING PROPOSITION (USP):

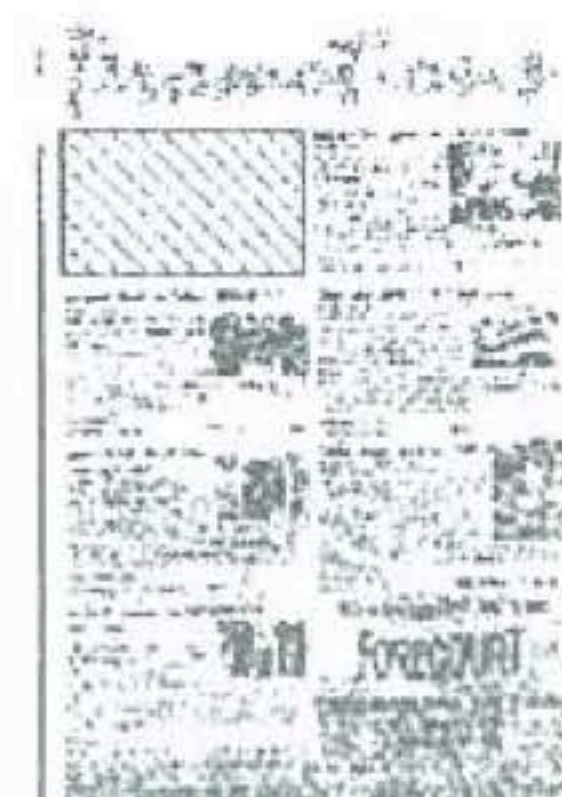
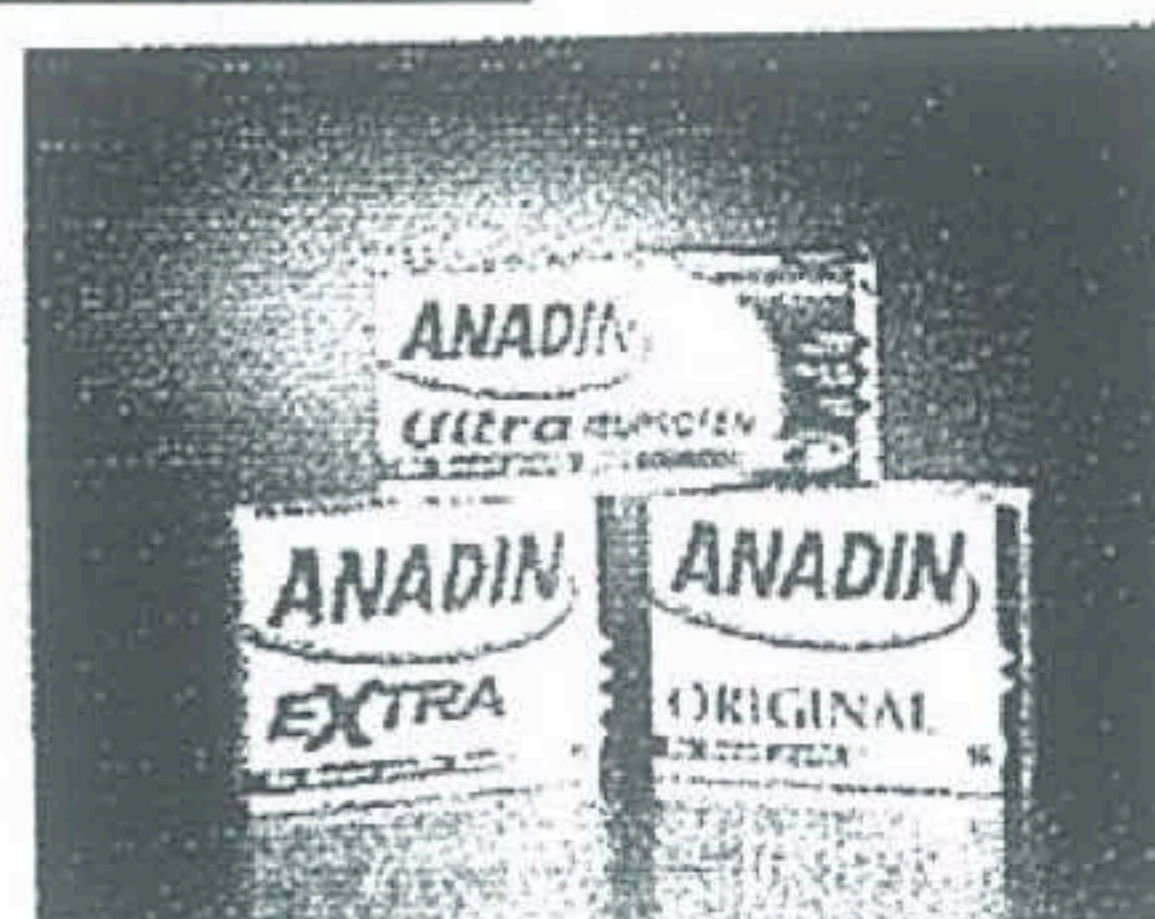
Leading analgesic Anadin has entered the realm of the superbrand by featuring in the annual brand bible, Consumer Superbrands. The reasons Anadin has been selected are clear. From its introduction into the UK in 1932, Anadin has developed into the most famous OTC brand in the UK - with over 90% consumer awareness, huge mass market appeal and a product range worth £45 million.

AVAILABILITY: Now

SUPPLIER: Wyeth Consumer Healthcare

CONTACT: Lexis PR

TEL



Brand Council adds high-street multiple and optical supermarket to top brands list

Official: Specsavers is a retail 'superbrand'

Specsavers Opticians has been officially named as one of Britain's new 'superbrands'.

The accolade has come from the Brand Council which has picked the nationwide group from the UK's thousands of commercial brands for its Consumer Superbrands 2003.

The multiple, which has joined the list for the first time along with Asda, is applauded by the Brand Council as having a market share 'twice that of its nearest high street competitors'.

'With approaching 500 stores in the UK, Ireland and the Netherlands, Specsavers is one of the most successful brands in retail optics and is the fifth largest opticians in the world.'

A total of 22 new entrants joined the superbrands list for 2003, which has 74 brands in all.



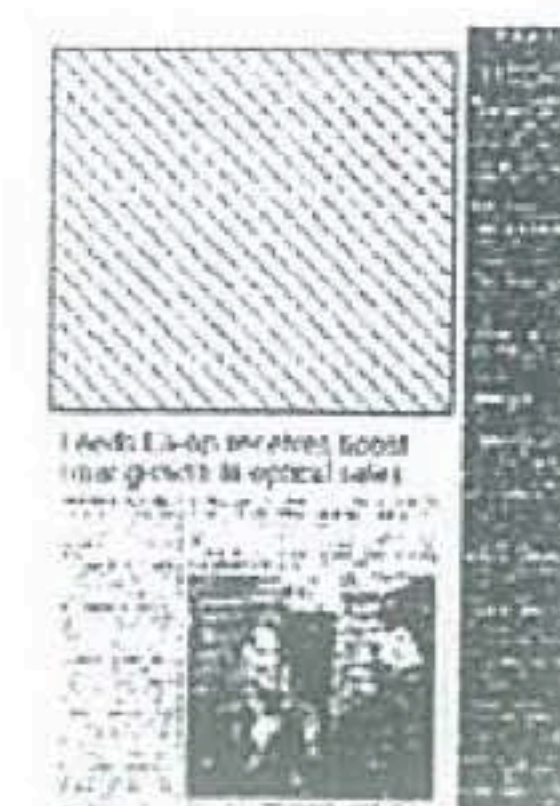
Specsavers: market share 'twice that of its nearest competitors'

lution'. Also super-brands 'do not cut [advertising] spend when the economy wobbles, but invests continuously'.

The publication said the multiple had revolutionised the optical market and was 'the first optician to advertise its products and services on television and still spends more on TV than any other competitor'.

Advertising industry magazine *Marketing* (March 20) has defined a 'superbrand' as 'capable of organic growth and evo-

In addition to Asda, retail giant Tesco, the rival supermarket group in the profession, continues to figure on the list.



RYANAIR

Should Ryanair refocus for emotional appeal?

Ryanair's profits are riding high in spite of negative PR. But does its policy of putting price before service undermine its brand? Daniel Rogers asks the experts for their views

Ryanair is a marketing phenomenon. Its bosses have burned the textbooks on superior customer experience and unashamedly followed a 'pile 'em high, sell 'em cheap'

pricing strategy.

And yet at a time when many of the world's airlines teeter on the brink of bankruptcy, Ryanair is turning in powerhouse financial results.

It is Europe's most profitable airline, with a market capitalisation well above that of British Airways.

But what is the true health of its brand? The *Which Airline?* report by the Consumers' Association places Ryanair at the foot of a league table of low-cost airlines, with only one-third of customers keen to recommend it to a friend.

While its expansion continues, recent passenger and internet statistics suggest Ryanair's load factor (how

full its planes are) in February 2003 was down 1% on a year ago to 81%, while main rival easyJet was up to 88.7%.

Ryanair has seen a barrage of negative publicity, beginning last spring with unsubstantiated rumours that pilots were cutting corners and continuing with BA briefing media against its lack of customer back-up. Criticisms hit a peak with its purchase of Buzz (*Marketing*, February 6). Ryanair soon slashed 440 jobs and scrapped several routes.

In the face of customer complaints, Ryanair boss Michael O'Leary's standard response is, "Well, what do you expect for £20 return?"

Indeed, the flipside of the

Which? survey is that the carrier scores well in terms of value for money.

So does it matter whether people don't love Ryanair, as long as they value it? Possibly. This week, *Superbrands* research named BA as one of the three brands consumers would miss most. While Ryanair continues to grow, it may need to worry little about such values, but will there be a time when it yearns for them?

We quizzed Tim Jeans, managing director of MyTravel Lite and former top marketer at Ryanair, and Simon Matthews of communications strategists Rise, which is launching Now airline this summer.

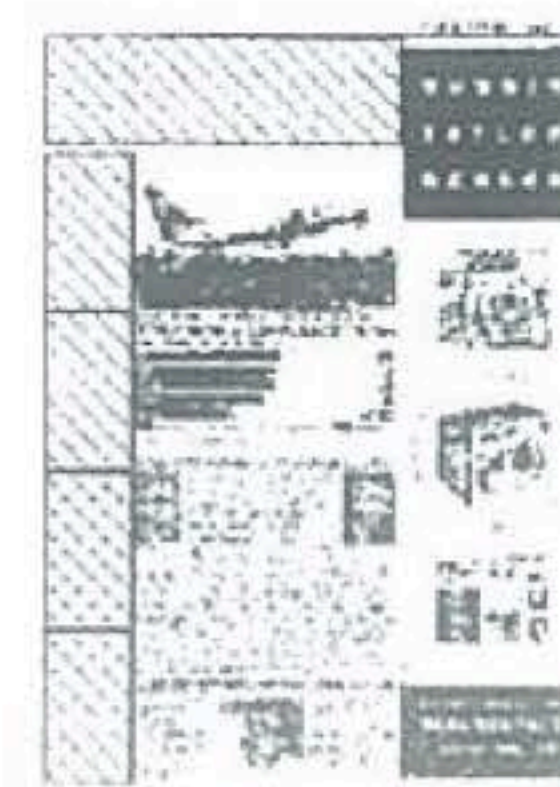
TREATMENT

- Create a spin-off brand that represents the next generation of airline travel.
- Take a fresh look at your customers; understand every segment and their differing needs.
- Consider innovation that sticks to the low-cost principle, but recognises customer change – reserve a seat for £5 extra, for example.
- Stop talking to customers on a 'one benefit fits all' basis.



O'Leary: shrugs off complaints

- The outdoor advertising looks cheap. Ryanair must avoid looking like the Poundstretcher of the airline world.
- There is room for non-price messages – punctuality and customer standards statistics that could dispel some of the negative PR.
- Constant repetition of offers can make ads look like wallpaper. Ryanair has an unrivalled list of destinations – shout about them.



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