Rebranding Charmin: A case study in semiotics

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Abstract

Rebranding Charmin describes the challenge faced by SCA Hygiene Products when it purchased the European rights to Charmin toilet tissue from Procter & Gamble. The conditions of sale included changing the brand name and stripping it of its mascot, which should have resulted in an initial decline in sales, not least because of the strong loyalty of Charmin's core customers. Semiotics helped SCA transform Charmin into Cushelle and exchange the bear for a koala, using sleight of hand that rendered the brand unrecognisable to P&G while migrating loyal Charmin customers from the old to the new brand with remarkable success. This paper includes discussion of the techniques used in semiotic analysis and an assessment of the types of research questions and business problems it is best used for.

Introduction

The paper you are about to read describes how a rebranding problem was solved using semiotics. It is a collaboration between Neil Blackburne, Consumer Insight Manager of SCA Hygiene Products, makers of Plenty, Velvet and Cushelle, and Dr Rachel Lawes, who is a semiotician and owner and founder of Lawes Consulting.

Background

SCA was founded in 1929 from the joining up of 10 Swedish forestry companies. It is a global hygiene business with 45,000 employees and a turnover of over €10bn. SCA specializes in personal care (nappies, feminine hygiene), packaging, forest products and tissue (facial, toilet and kitchen). Historically the bulk of SCA's business has come from supplying retailers with own brand products. Over the last decade SCA has been strategically trying to increase the representation of consumer brands in its business as these provide more stable and usually higher margin sales compared to retailer brands.

At the end of 2007 Procter and Gamble decided to exit its European tissue business and sold this off to SCA. As well as buying manufacturing site and staff SCA also acquired a number of major brands. These included Bounty kitchen roll, Tempo facial tissue and Charmin toilet paper. Charmin was the biggest UK brand bought with sales of over £90million (Kantar Dec 09). However, it also had strong competition from Andrex and Velvet.

Managing these brands would have been difficult enough as it quadrupled SCA's UK brand portfolio and required a massive change in the way that we were organized. However, P&G had also included a bitter pill to the sale. Charmin was only bought with a three year license. P&G had spent tens of millions of pounds building up the Charmin brand in the UK and yet everything that currently signified this brand (the name, the logo, the Charmin bear icon) had to change enough to satisfy P&G (though the exact nature of this difference was not outlined).

Strategically there were a number of options open to us.

- Try and migrate Charmin to Velvet
- Delist Charmin and replace it with SCA's European "power brand" Tempo
- Create a new brand from Scratch.

The UK marketing team chose to create a new brand from scratch. Charmin is also present in Germany and they decided to migrate the Charmin brand to their strongest local brand (Zewa).

The risk

The potential for sales loss as a result of such a dramatic change is well documented. David Aaker (1992) argues that such big changes impact heavily on brand awareness

which then hits sales. Millward Brown (2009) has substantiated this theory. A survey of its knowledge bank reveals that loss of unaided brand awareness in the short term can be as high as 26% and this loss can cause an immediate sales decline of between 5-20%. When this happens brands can find that it takes three to four years to recover.

A classic example of this was Kellogg's attempt to transform Coco Pops into Choco Krispies (Mathers 2000). What followed was a (perhaps inevitable) public outcry, a rejection of the new brand and a huge decline in sales. Ultimately Kellogg's was forced to revert back to the original Coco Pops name. The stakes were even higher for Charmin as we had to change much more than just the name and with no option to go back if it didn't work!

The brand

Charmin is a brand with high loyalty. Despite being 20% smaller than Velvet, the number two brand, it had almost 50% more highly loyal shoppers. The double jeopardy law (Ehrenberg, 1969) says that in general larger brands have larger loyalty so we knew that there was something unusually engaging about this brand. This was also backed up by focus group research where consumers responded almost aggressively when showed stimulus of their bear becoming moved out by the Velvet baby MD.

While P&G had given us the brand equities they had not given us the deep understanding into their brand that they had accumulated over the years of its development. How could we understand what drove the current consumer connection and how could we change it enough to satisfy P&G and yet keep its fundamental essence so as to retain loyalty?

Objectives

The business objectives were very simple. How to migrate the brand without losing any sales?

The initial marketing objectives were to identify which of the strategic objectives (migrate to Velvet or Tempo or change to a new brand) would best deliver on the business objective. After initial semiotic work that argued strongly for a new brand the marketing objectives changed to designing a new brand from scratch that would convey all the same brand equities as Charmin while being different enough to satisfy P&G. This included finding a new name and a new icon for pack and advertising as well as a new logo.

The research objectives changed as the phases of the research progressed. Initially they were explorative and focused on understanding:

- the meaning and emotional value of the Charmin brand;
- the meaning and emotional value of competitor brands;
- the specific conventions of visual design & verbal communications that create these meanings for Charmin & competitors;
- how the various bathroom tissue brands form a constellation or 'map' of meaning, and where the gaps are that a new brand could exploit;
- the reasons why some brands stand out more on shelf than others;
- the emotional climate of the British public around toilet paper; what they need, what they want, what SCA really needs to avoid;
- where British collective ideas about toilet paper and personal hygiene are heading, and therefore what future directions a brand could take.

Subsequent research then looked to evaluate the insight that was generated from this initial research and involved further semtiotic work, internal ideation workshops and focus groups.

Method

Why semiotics?

Semiotics is the study of consumer culture. It is part of a new paradigm of **culture**-focused research methods also including discourse analysis and ethnography. This paradigm stands in contrast to the human-psychology model of market research, where the human **individual** is the object of study and psychological tools such as survey questionnaires and discussion guides exist to expose and reveal psychological phenomena such as attitudes, prejudices and beliefs (Lawes, 2002).

In recent years, and especially over the last decade, the family of culture methods has made a big impact in the market research industry. This is because it has proved to be useful in providing a fresh perspective on the types of questions that brand managers

and marketing managers are constantly asking themselves: How can we build brands that are appealing to consumers? What kinds of NPD should we concentrate on? How do we ensure that our carefully designed ads and packages correctly convey to consumers the messages we want them to take away, instead of some other message that we didn't bank on? What emerging trends are there, what will consumers want not just now but in five or ten years?

There are some major advantages to considering these questions through the lens of culture rather than the lens of the psychology of the individual. Most importantly, the human psychology model of research places an enormous burden on the human respondent. The things respondents say amount to the entire data set. The things they say are limited and constrained by the matrix of questions they are offered (no-one ever runs focus groups where consumers are told "just talk about toilet paper for an hour and a half"). Moreover, there are some questions that no consumer can reasonably be expected to answer, questions that concern future trends or the underlying historical and cultural reasons why large numbers of consumers think and act in a certain way.

The new family of culture methods has become useful to business because: it can certainly include questions-answered as part of its data set, but expands the data set considerably beyond the tight confines of a street corner survey or a viewing facilitiy; it shows consumer insight professionals how to get value out of naturally-occurring consumer talk (that is, any and all kinds of talk that are unprompted by a market researcher); it is specifically designed to interrogate consumer **culture**, which typically is nearly invisible to the consumers who find themselves immersed in it.

A few words about how the culture methods differ:

- Ethnography is the oldest of the culture methods. Ethnography does not mean 'doing an extra-long in-home depth interview'. Ethnography is principally an exercise in observation, and the researcher needs to know what he or she is looking for. The task of the ethnographer, in the style of a be-hatted explorer going off to study the habits and customs of remote civilisations, is to drop all their prior assumptions about human society and to make a complete picture of (hence – graphy) the lives of certain subcultures of consumers, so that we can understand how their daily routines, the way they arrange their homes, their family relationships, their tastes, their superstitions and their brand choices all fit together. It is the right research method to choose when the details of consumer behaviour are unknown or lacking explanation.
- Semiotics also interrogates culture but is not tied to collecting its data at some fixed point in time, as ethnography is. Semioticians operationalise culture by regarding it as manifest in all types of human communication, from the private to the corporate. While the ethnographer will identify some particular place or situation and do all of their data-collecting within that setting, semiotics says that wherever your topic of interest is being mentioned, that's where your data are. If we want to understand how Brit culture treats the topic of personal hygiene, let's say, then our data set is any and every occasion when personal hygiene is being communicated about, which could include: professionally designed communications such as advertising; government health messages; popular TV; all print media from the highbrow to the lowbrow; popular jokes, skits, songs, bus-stop graffiti; public health scares and moral panics; health and hygiene fads and fashions, and physical objects and environments such as public rest rooms and toothbrush vending machines. Because of its operationalised data set and huge scope, semiotics is especially good for understanding the ideologies and customary behaviours of

very large populations, explaining national variations and identifying emerging trends.

- Discourse Analysis is by far the youngest of the three culture methods, dating from approximately 1987 (Potter & Wetherell, 1987). It is partly descended from semiotics and was developed by social scientists specifically to capture and explain the mechanics of live conversation. The conclusions it is able to draw are nearly as far-reaching as semiotics and it enjoys considerable academic rigour. It is a skill that all semioticians should strive to add to their repertoire. However, it remains a technique that is specifically designed for understanding the intricacies of conversation and typically does not extend its remit to include visual images, environments and material objects.

Research questions and data in semiotics.

With a change in analytic focus comes a change in the type of language used to formulate research questions. The culture methods do not investigate the psychological phenomena such as attitudes, beliefs and prejudices that are presumed to exist inside people's heads. Rather, semioticians investigate questions such as the following:

- What is the status of personal hygiene in British culture? How is this different from, say, ideologies of personal hygiene in Germany or the United States?
- Within a culture, where are the tensions between conflicting ideas and practices? What ideological dilemmas (Billig, 1988) exist in British culture around personal hygiene? What is taken for granted and what is treated as the subject of controversy and debate?
- What is the meaning of specific cultural objects, such as brands? This isn't a question we need to take straight to consumers. The meaning of, say, the Charmin bear is not dictated by the unique contents of individual consumers' heads (we know this because if it were a matter of individual judgement, the Charmin bear would mean something different to everyone who encounters it, but this is demonstrably not the case and in fact would make attempts at branding impossible). Rather, consumers are mouthpieces for culture, they articulate cultural values and standards according to their demographic and where they happen to live. That being the case, we can get a more reliable answer about the meaning of the Charmin bear by going directly to the cultural experiences and resources that shape the things consumers are capable of saying about it.
- What is the meaning of specific signs and symbols within brand communications? If you colour your brand purple, how is that different from colouring it navy blue or neon pink? If you call your brand Cuddlebum, how is that different from calling it Techwipe? Are there good reasons to reject both of these semiotic signs and call it something completely different? If so, what?
- What are the right avenues for new product development? For example, what do consumers need more, between highly specialised products and multi-purpose products that do everything? Will consumer cultures that are resistant to moist toilet paper ever come around to the idea? What would that require?
- What lies ahead? For instance, right now consumers are on board with being green, they accept that green is good, they have even latched on to talk about reducing their carbon footprint. They won't stay interested in carbon footprints forever, though, so what's coming next? A big part of semiotics is diachronic

analysis, which is about tracking and predicting ideological change over time. See Lawes (2009) for more details.

These are the ways in which semiotic research questions are formulated. The data set, as mentioned earlier, is large. One of our maxims at Lawes Consulting is, "where semiotics is concerned, there's no such thing as too much data". Essentially, if you are for instance researching the role and opportunities for moist toilet tissue in Brit culture, you want to make the largest collection possible of examples of Brit culture saying (and doing, and designing) things in the general area of body hygiene and toilet hygiene. Since there is never an infinite variety of perspectives within any given culture, the idea is to make a data set that is large enough that you can detect patterns emerging. When your data analysis is no longer throwing up new patterns, only more instances of things that belong within the patterns already identified, that's when you stop. A more complete picture of the normal procedure for doing semiotic projects is described in Lawes (2002).

In this particular case, SCA had some very specific questions, including the following.

- What is the meaning of the Charmin bear? What is it doing there?
- What can replace the bear that will feel the same to consumers but look different to P&G?
- What does Charmin mean? How can we choose among the potentially limitless alternative names?
- How can this new brand occupy the same territory as Charmin, satisfying the loyalists, while adding value or increasing its reach and maintaining a point of difference from other brands: not just Andrex but Velvet, which SCA also owns?

These are highly semiotic questions. They are not questions concerning 'attitudes to' toilet roll. They are questions concerning the status, reach and exchangeability of semiotic signs such as 'bear' and the word 'Charmin'. In this case, the bulk of our analytic activity concerned the cultural experiences that consumers have had with the idea of bears and words like Charmin. The big question is "where will consumers have seen this before?", in other words, "what cultural resources are consumers going to apply in making sense of the existing brand and the new brand?"

Findings

The Charmin bear is an anxiety displacement mechanism.

In order to understand what Charmin meant to consumers, we first needed to place it in context against competitor brands, notably Andrex and Velvet in the UK. When we consider these brands together, it becomes obvious that they have something in common. Throughout their history they have very rarely talked about the most common use of toilet roll, which is of course adults wiping their bottoms. Velvet briefly ventured into some quite art-house style advertising which talked about loving your bum and was shot in black-and-white for added sophistication, but this did not last long. Velvet also had quite a long history of socially-ambitious Mrs Bouquet foisting luxury toilet roll on her nearest relatives, but of course in that narrative the point was entirely the aspirational qualities of luxury products and there were no references to toilet paper's more

mundane aspects. Other than that, and more recently, toilet roll advertising has been a circus of adorable puppies, tiny children and cartoon bears. Why?

A semiotic perspective invites us to observe that there is no redundancy in human communication. If something is present, it is present for a reason. If something in talk-about-toilet-roll is completely obliterating the actual main use and purpose of toilet roll, then it is for a reason. The most economical inference is that British consumers find the real use and purpose of toilet paper embarrassing, and there is an abundance of supporting evidence for this, ranging from the customary practice of locking the door when in the loo, to British 'toilet humour' which eloquently articulates the exact nature of our social tensions. (At the time of writing, your author has recently viewed the two 'voted most popular' episodes of award-winning TV comedy Peep Show: both extracted considerable comedy out of the desperate awkwardness and embarrassment of needing to urinate and not having anywhere socially acceptable to put it.)

There are, then, a lot of dogs, bears and babies in toilet paper advertising, because people find that a less worrying point of focus than the alternative. There is a further layer of meaning just below the surface, however. Consider that just about anything could be used to distract the audience's attention away from embarrassing adult bums. Wallpaper. Balloons. Ice cream cones. Actual toilet paper ads, though, aren't full of a random assortment of 'just anything', they are specifically full of dogs, bears and babies. Another oft-repeated maxim in semiotics is "where there is choice, there is meaning". That is, if it could have been done any other way, then the fact that it has been done this way is meaningful. Let's briefly consider what possible relationship dogs, bears and babies might have to adults and their anxieties about poo.

In contemporary Western culture, while adults, as a sign and a condition of adulthood, are expected to perfectly control their bowels and carefully choose where to open them, we live alongside other creatures who are given a lot more license to excrete without shame, wherever and however they want. Babies and toddlers characteristically go in their pants, and adults will not only clean up the resulting mess but talk to each other about their infants' bowels in the most indulgent and uninhibited way. Dogs are popular household pets, so popular that they have nearly been elevated to the status of a small child in Brit culture. Dog owners spend lots of time clearing up dog poo and are not particularly shy of talking about it. Puppies, in particular, being baby dogs, are easily forgiven for pooing in the wrong place. As for bears … I am sure every reader of this paper knows the common-sense idioms and cliches which dictate that the Pope is a Catholic and that bears relieve themselves in the woods. Dogs, babies and bears, then, are quite clearly not 'just anything'. They are in fact life forms which are given special dispensation by properly behaved adults to break adult rules. In the context of advertising toilet paper, they do not so much deflect the audience's attention completely away from poo, as provide a safe space where adults talking about poo and bottom-wiping is acceptable. They are what Freud would have called an anxiety displacement mechanism. You can't kick your mean boss, so you go home and kick the dog. You can't talk openly about adult bums, so you talk instead about dog, bear and baby bums.

At this point we knew what the Charmin bear was there for, and why he was a bear. We were ready to tackle the question of what could replace him.

The Charmin bear is a specific type of bear.

In consumers' collective imagination, there are several types of bears. There are grizzly bears which are large, strong, fearless and fierce and appear in nature documentaries. This is the type of bear Sarah Palin was referring to when she recently described herself and women similar to her as 'Mama Grizzlies'. Then there are stuffed teddy bears, which are cute but mute. Finally, there is a category of anthropomorphic bears that walk like humans, are fluent English-speakers and sometimes wear clothes. These would include Paddington Bear, Winnie the Pooh, Rupert the Bear and the Charmin bear. Therefore, in thinking about finding a new brand mascot to replace the Charmin bear, we needed to recognise that not only were his bear-like qualities anxiety-displacing, but also he bore significant resemblance to some humans. Since there is no redundancy in human communications (everything is there for a reason), we wanted to pay attention to the particular type of human-ness that the Charmin bear displayed.

In fact, we need look no further than Homer Simpson to understand what human archetype fhe Charmin bear was tapping into. For a start, they are conspicuously the same shape. Homer is drawn with a huge belly, this being his most dominant feature, to indicate that:

- He is not particularly intelligent or cerebral.
- He is dedicated to life's pleasures, his big belly is a badge of joyous consumption (usually of beer but also food, including children's sweets).
- He is 'grounded'. He has a low centre of gravity physically and this is a metaphor for being grounded in the mundane business of everyday life. Homer does not worry too much about politics or philosophy or issues outside his own small town. He concentrates his attention on the simple things: can he finish a big sandwich? Can he find a way to be allowed to work from home? Can he get out of going to church? These are the types of questions to which Homer applies himself.

This really helped us to know what type of animal we were looking for. As semioticians, we knew that certain animals, and certain types of animals, should be out of the picture. For instance: owls (a semiotic sign for wisdom); ravens (harbingers of doom); rhinos (thick-skinned, therefore insensitive); chimpanzees (quick on their feet, intelligent, unpredictable, have a reputation for throwing poo) and probably all sea creatures (distractingly wet, and range from 'too intelligent' (dolphins, whales) to distractingly non-cute (squid, sharks, crabs, lobsters).

Animals that are semiotically close to the Charmin bear. Koala.

Some animals are semiotically very close to the Charmin bear, but did not ultimately win the day. We considered pandas. Pandas have a round shape with a low centre of gravity that they share with the Charmin bear and with Homer Simpson. They have masses of charm and emotional appeal, They are perceived to be gentle and cuddly. Also, they are bears, which is handy, although it would have given P&G reasonable grounds to object. On the other hand, pandas have a lot of semiotic equity that is quite far away from the values and messages that SCA wanted to convey with their new brand. In particular, the problem with pandas is although they are lovable, they have a long history of being presented to consumers in connection with emotional appeals regarding endangerment and extinction, for instance, think of the logo of the World Wildlife Fund. They are often shown looking sad. Because of this semiotic heritage, they have too much pathos for toilet roll.

Finally, we alighted on Koala. Of course, koalas are marsupials and not bears, yet they are widely perceived to be bears, which was an advantageous situation for us when it came to resolving this problem of how to retain some of the semiotic properties of bears (such as having a licence to poo in the woods) while convincing P&G that everything had changed. Another advantage of Koala is that all koalas, even the adults, semiotically resemble babies. They are perceived as cute and there isn't a sudden drop in cuteness when the animal grows up, as there is with lions and seals. So that was useful because it left lots of options open to SCA. At the point of making his debut, while being thoroughly adorable, the koala's age could be left completely unspecified and everything is still up for grabs when it comes to deciding whether or not Koala has a family and with whom he spends his time. Although koalas are not native to either Britain or Germany, they do have some history of being anthropomorphised within these cultures. That's a technical way of saying that consumers can recognise koalas because they already know about them through things like The Koala Brothers children's TV show which is broadcast in Germany as well as the UK. That's how we arrive at a situation where British and German consumers do not all know that koalas are marsupials, yet they can easily answer the question of whether or not koalas can fly helicopters. If you are wondering, the right answer is yes, they can.

In consumer focus groups, respondents agreed that Koala is as close in meaning to the Charmin Bear as you can get without actually being that bear. Meanwhile, P&G agreed that Koala and the Charmin Bear are not the same. It was a happy outcome.

Naming: how to get from Charmin to Cushelle.

When finding a new name for the brand we wanted to take two things into consideration. Firstly, we wanted a name that had a similar meaning to Charmin and that conveyed desirable attributes of toilet paper such as softness. Secondly, we wanted a name that was linguistically similar to Charmin: some of the same letters and similar sounds.

We did some brainstorming with SCA and their various suppliers, who came up with lots of different names, which we semiotically mapped. We were able, with relative ease, to convert a long list of names into a visual display that showed how they cluster around this or that meaning. This helped us to eliminate names that were too far removed from the brand's equity and values. For instance, "Cloud Nine", while connoting both softness and happiness, appeared on the Fantasy part of our map. It may have a lot of nice things going for it but it is explicitly disconnected from anything in the real world and does not have much in common with Charmin, which consumers can read as a synonym for Charming. The mapping process helped us turn a long list into a short list.

When considering these names semiotically, the process is the same one used for choosing among graphic depictions of animals. The big question is 'where have we seen this before?', what experience will consumers have had with these types of semiotic signs? Thus, 'Cushie' fell by the wayside because although it says 'soft', the context in which it is usually deployed is not very Charmin-like. In common use, it is regularly confused with 'cushty' and is the type of word that might be used by Del Boy Trotter, the lead character in Only Fools And Horses. A web search revealed that while cushy is a widely used word, it is most naturally and unapologetically used by people and brands with Trotteresque qualities, such as The Sun ("George Michael plays pool in cushy jail"). For contrast, when The Telegraph uses the word cushy, it puts it in inverted commas to

explicitly distance that choice of word from the brand ("'Cushy' prisons see dozens trying to break in").

One big reason for rejecting a name, then, is that its undesirable connotations outweigh the desirable ones. That's why names such as Cuddlesoft were rejected as too babyish. Charmin loyalists may well enjoy the cosy, cuddly, charming world of Charmin but that doesn't mean they want to be patronised and they are not confused about the difference between themselves and their young children or babies. In any case, why introduce confusion into the retail landscape? Everyone benefits when semiotic signs are used thoughtfully. It would not help a brand of family toilet tissue to wear the semiotic signs of baby wipes, and frankly it is also not much help to all the brands sitting in the babycare aisle.

The more we eliminated possibilities, the more we came to understand about what the new name needed to do. It needed to carry Charmin's existing brand values and equity. It needed to offer consumers an interpretative framework for making sense of it: that is, they should not scratch their heads and think of comedy Cockneys when looking at it for the first time. It needed to flatter the self image of Charmin loyalists, and they think of themselves as discerning grown-ups. Finally, a bit of semiotic collaboration with SCA resulted in Cushelle.

Cushelle ticked all the right boxes. It begins with C, which is helpful for recognisability. It includes cush-, meaning cushiony or 'soft comfort' but without lapsing into regionally specific slang. The –elle suffix is very important Not only is it a pleasant, soft sound, but it is recognisably French, which gives it something in common with the Ch- in Charmin, while being easier for non-French people to read and pronounce. What's more, France has lots of positive connotations if you are a Charmin loyalist. Feminine. Sophisticated. Nice quality. For grown-ups, not just babies.

We showed it to consumers, on a shortlist with some other names, and they agreed it was the way forward. It appealed to the self-image of Charmin loyalists, as semiotics predicted it would. They agreed that it still felt like 'their' brand. P&G agreed that the two names had nothing in common. We had found our solution.

The new brand.

Finally, a few words about the new brand that emerged. Cushelle preserves Charmin's brand equity. Charmin was not the same as either Andrex or Velvet. Charmin loyalists were getting a lot out of their brand: it was more feminine and nuanced than Andrex and deployed a much more explicitly emotional dynamic than Velvet. That is, Velvet is sensuous and luxurious, which implies something about the product, but it is also aspirational and ambitious. In addition, Velvet has a strong commitment to the environment front and centre of its brand communiations, and caring about the environment certainly requires being able to take the long view. In contrast, the charming world of Charmin is much more emotionally immediate. Charm happens in a moment. It is visceral. It is the sudden, gripping appeal of the cute, the dainty, the winsome. It's not something you have to plan for. We think, and focus groups confirmed, that Koala is cute, in exactly that way. He offers consumers the same hook that the Charmin bear once offered, on which to hang their brand loyalty.

Cushelle is also more than Charmin, it has slightly expanded the brand's reach, in terms of the range of meanings it is able to express. The original bear was, we might say, a stock character, like a pantomime dame. He did what he was supposed to do. He lived in the woods. He was an excellent anthropomorphic anxiety-displacing mechanism

and he was absolutely the most cartoon-bear-like cartoon bear that he could be. He was very conventional, he had an incredibly dull life and he occupied a very small world. Koala is a different story. He is free. He is three-dimensional. We don't know yet what he can do or where he can go, but we do know there are currently no constraints. He could sail a ship. He could climb the Eiffel Tower. He could potentially do anything we want him to do.

At the time of writing, Koala's world remains unpopulated. He is floating in lilac-coloured space. Taking this into account is perhaps even more reason to call the rebranding exercise a success. Consumers have been able to accept the change. We have taken away the Charmin bear's neighbourhood and family and swapped that context for ... nothing. All the exciting decisions about this brand and this koala's life story lie ahead, and yet consumers are already on board.

Discussion

The semiotics provided a clear understanding of why people felt such strong affinity to the Charmin brand and what direction SCA needed to go to keep this affinity. All semiotic findings were checked using qualitative research (focus groups). The experience of doing semiotics before focus groups provides an experience similar to studying anatomy before going to a life drawing. The surface responses that people give "I don't like it", "It looks old fashioned", "It's a bit too girly" can be understood at a deeper level. While the focus groups validated the semiotics they also provided a number of other benefits.

- Semiotics was a new technique at SCA and so using the focus groups allowed us to convey recommendations from a commonly accepted means of research. This came to the fore when there was a suggestion for using a lion as the brand icon. Despite evidence from the semiotics that this would not be as relevant as the Koala it was only the focus group results that ultimately made the case for the Koala overwhelming.
- Semiotics works better when you ask it to focus on things that are visible and available in the target market's culture. That is, it is good for exposing the anatomy of popular brands because they are big cultural objects that are much-discussed by the public and are inclined to appear in pop culture. When the semiotician tries to gather a data set, they are unlikely to have a problem if the client is asking them to analyse something like a whole nation of people or a familiar brand mascot. On one project we used semiotics to research new embossing patterns for kitchen roll but found its recommendations were too radical for our conservatively-minded consumers. This may be because consumer culture does not characteristically talk about embossing patterns a lot or indeed at all, and so there is a much smaller pool of data for the semiotician to work with. Of necessity, the outcome of that type of project relies more heavily on inference and professional opinion, so focus groups continue to be especially valuable to us in that kind of situation.
- Semiotics provided guidelines for names and brand icons but we still needed to test the many exemplars of these with consumers. Consumers are still the ultimate deciders of what they like (if not why).

Once we had decided the icon and name we had a choice about how we staged the transition from bear to Koala. Consumer feedback said that the similarity of the name and icon would allow us to go for a hard change. However, what consumers really wanted reassurance on was that the product they loved hadn't changed. We thus went to an intermediate pack with the new name and icon but keeping the logo's swoosh and colour. The roundel on the side of pack which had been used to convey Absorbubble technology was utilised to convey that this was the "same great product" as Charmin. The initial ad was very uncluttered and focused on conveying that Charmin is now Cushelle. In the final stage of the migration the only consistent element is the colour purple and everything else has changed. The new advertising is aimed to build the personality of the brand Icon and will involve a much richer creative environment.

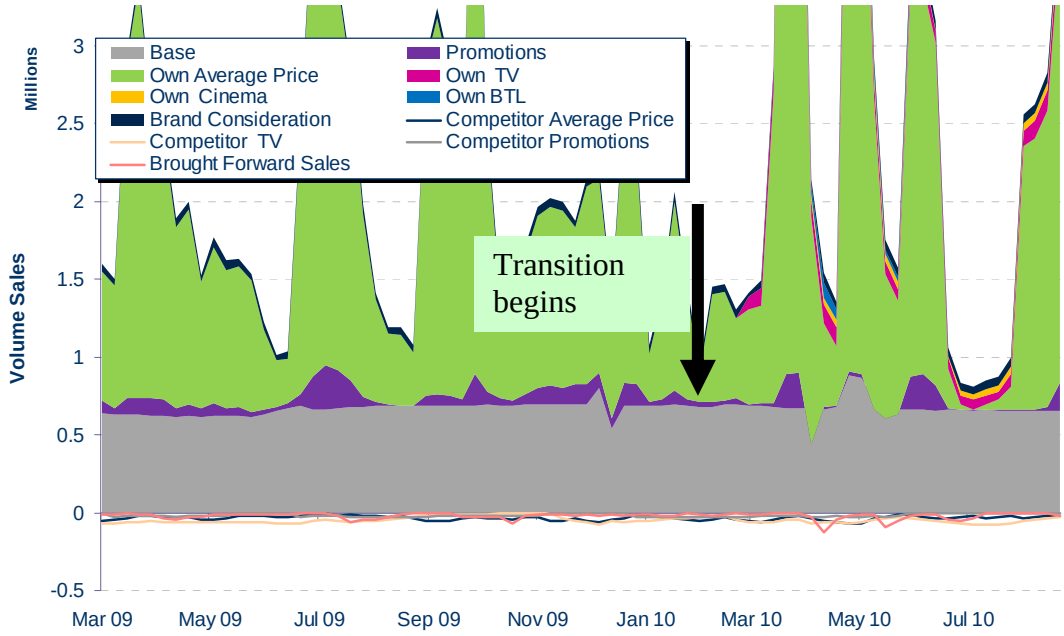
Business performance

Cushelle replaced Charmin in the stores in February of 2010 and the new ad went out in March 2010. Previous analysis of risk had shown a potential 20% decline in sales (Millward Brown 2009). Looking at Kantar data for the end of 2010 we can see all measures (apart from purchase frequency) are up.

Total Charmin/Cushelle - All Retailers - Total Quality

	52 w/e 28 Dec 08	52 w/e 27 Dec 09	YOY difference	52 w/e 26 Dec 10	YOY difference
Penetration %	27.6	25.3	-8.3	26.3	4.0
Purchase Frequency	3.4	3.1	-8.4	3.0	-3.6
AWP Spend	13.59	14.26	5.0	15.40	8.0
AWP (Rolls per Buyer)	39.1	40.7	4.0	42.5	4.5
Spend per Trip	3.99	4.57	14.6	5.12	12.0
Rolls per Trip	11.5	13.0	13.5	14.1	8.5
Price per Roll	0.35	0.35	1.0	0.36	3.3
Shoppers	6897094	6381814	-7.5	6668710.5	4.5
Expenditure (£000s)	93,712	91,024	-2.9	102,681	12.8
Volume (000 Rolls)	269,990	259,718	-3.8	283,697	9.2

Success as measured by Kantar and IRI data can be bought. Like most markets, the biggest driver of sales in the toilet paper market are promotions and price drops. So all it takes is a change in phasing in deals or a price drop to see most of your consumer metrics go up. Econometric data as measured by Brandscience shows that our base sales after accounting for every other factor, have held up. Our advertising even showed a cumulative effect on sales (the red section of the graph). This was despite the objective of the advertising being purely to migrate loyal buyers over to Cushelle and maintain sales.



Meanwhile the transition in Germany to Zewa had not gone down well. Comparing brand share in 2009 to half year 2010 showed a 12% decline in SCA brand share. If we look at the combined share of Charmin and Zewa this is a 21% decline which is very close to the prediction that Millward Brown gave from their studies (Knowledge Points 2009)

SCA Germany brand share (IRI)

	Charmin	Zewa	Tempo
2009	1.5	5.8	1.0
YTD June 2010	0	5.8	1.5

In summary SCA has found semiotics to be a powerful tool:

- It is predictive. Focus groups have demonstrated that it can accurately predict consumer response
- It is reliable. It is not just useful once but has consistently added value on multiple occasions.
- It is easy to use. Semiotics speaks a language that is easily understood, with SCA's new products, design, brand marketing and creative departments all finding useful guidance from its outputs.

Conclusions

SCA faced a challenging situation. A much-loved brand needed to be stripped of its defining features without alienating loyalists and causing a decline in sales that might require three or four years of recovery. It could have taken various different approaches to this problem, but chose to include semiotics in the mix. This proved to be advantageous for SCA's consumer insight and brand strategy, in the same way that studying anatomy would confer an advantage on someone attending a life drawing class. In particular, semiotics helped to separate all the valuable brand equity that we wanted to preserve from specific manifestations of that equity such as the Charmin name and the bear, which had to go. It then helped us identify what new semiotic signs could successfully communicate the values and personality of the brand.

More broadly, semiotics works well in business as it fits into two research trends. The first is the realisation that what people say isn't always a good predictor of what they actually mean or what they will do. This has driven the growth of quantitative tools like conjoint analysis, neuroscience and eye tracking as well as qualitative approaches like ethnography and semtiotics. The second trend is that businesses are increasingly aware that putting insight into someone's title doesn't automatically solve the problem of how

to generate insight within the company. Research has been largely grounded in disproving the null hypothesis rather than coming up with the hypothesis in the first place. This has driven the growth of immersion workshops and co-creation sessions. We have found semiotics and its related disciplines a powerful tool for feeding into this process.

SCA has found semiotics to have applications across the business, in brand migration, pack design, paper quilting and advertising evaluation as well as using futurology as part of its business planning.

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