



## Never mind the sizzle ... where's the sausage?

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Retail own-label share of UK grocery sales in 1981 was 22%. Today it is 47%. If the trend continues, manufacturer brands risk becoming a supporting actor, not the star of the show. And it's not just a UK issue. We can see the same threat of retail own-label in other European markets such as Holland and Germany.

Just in case there was any doubt about the intentions of your friendly retail partner, Asda's marketing director spelt it out last year in black and white. He stunned into silence a group of top marketing directors who'd invited him to talk at their conference by saying: 'My job is to "undo" the marketing of brands and drive consumers to own-label alternatives. Our products are not only more profitable, but also of superior quality.'

One explanation for this mess is in the last part of this quote. Many brands have taken their eye off the product ball, seduced by the dual sirens of 'sizzle' and 'stretch'. Sizzle refers to an obsession with the emotional side of branding; and by focusing on this emotional side at the expense of product, or 'sausage', many brands have fallen into the trap of over-stretching into markets where they don't really belong.

This focus on sizzle and stretch at the expense of substance is personified in my new book *Where's the Sausage?* by Hugo Gaines, the marketing director of an imaginary company called Simpson's Sausages. And although Hugo's cringe-worthy cock-ups are fictional, he represents a side of marketing that is very real. And very dangerous.

### **THE OBSESSION WITH SIZZLE**

Many of us in marketing are seeking salvation in the emotional side of branding, to do with values, personality and tone-of-voice. According to the gurus of emotional branding, it is no longer enough to be liked. Your brand needs to become what Hugo calls a 'Hugbrand™', which is loved, not just liked. And the key to creating this emotional bond is through emotional communication.

In lifestyle categories such as fashion and fragrances, emotional sizzle is rightly centre stage, with products playing a secondary, supporting role. New fragrance creation often starts with the name and 'the big picture' visual to use in communication, with the fragrance itself following after.

However, the problems start when marketing teams working on pet food and pasta sauce try to adopt the same lifestyle

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branding strategies. This is especially dangerous in cases where the product they are selling is identical or even inferior to retailer own-brand competition. We end up with the surreal situation explained to me by a marketing manager of one of the UK's leading laundry cleaning brands. I asked why his brand was 30% more expensive than the retail own-label equivalent. His response? 'We advertise on TV.' When I asked why the brand was advertised on TV his answer was 'To support our premium price.'

## **OVER-STRETCHING THE MARQUE**

A dangerous side-effect of the focus on emotional sizzle is over-stretching. Climbing a 'ladder' up from a functional, product-based level to the rarefied heights of emotional branding gives the (illusory) freedom to stretch into pretty much any category that takes our fancy. Having a decent product becomes secondary, as long as there is some emotional linkage. Many of the resulting brand extensions are merely 'brand ego trips', lacking any competitive added value.

This thinking led to *Cosmopolitan* deciding it was no longer a magazine. It defined itself as a lifestyle brand that empowered women to be more confident and successful, launching *Cosmopolitan* low-fat yoghurt to compete with Danone.

Gillette decided it was not a shaving brand, it was a 'male grooming brand', and launched into a head-on, bloody battle with Unilever in the deodorant market. And, coming the other way, Unilever's Lynx body spray invested heavily in launching a shaving range. Lynx shaving and *Cosmopolitan* yoghurt ended up in the overcrowded extension graveyard, where over half of all brand extensions go to die. Gillette struggles in deodorants to get anyway near the leading share it has in the shaver market, (though it may have more luck now it's part of P&G).

And while brands have been busy climbing emotional ladders and stretching into new markets, retail own-label has been busy on product innovation. And they're no longer content with producing low-priced rip-offs of brands; they're leading the way in many categories, creating premium-priced, added-value offerings. Sainsbury's Taste the Difference is now a £450 million brand in its own right, and in some cases higher priced than the manufacturer brands.

## **MARKETING BASED ON SUBSTANCE, NOT SPIN**

There is an alternative road, although it may not be as glamorous or trendy. Nor is it exactly revolutionary. But it has the potential to add more value for consumers and shareholders alike, by re-focusing brands on substance, not spin.

### **1. (Re)discovering Product Passion**

The first step is the most fundamental, and perhaps the hardest. For many it requires a change in culture and mind-set. It requires us to stop focusing on creating emotional connection through communication, and instead discover, or rediscover, a passion for product. This means not just having product performance as one thing on a long to-do list, but making it a top priority. And it means refusing to give up on product performance as a source of advantage over retailer own-label.

Interestingly, many of the examples I have come across where product passion is alive and kicking come from companies often championed as examples of emotional branding.

Take Innocent, for example, a brand that has managed to keep a leading 68% share of the smoothie market despite a host of own-label imitations. Most analyses of the brand's success in growing to a £100 million+ business focuses on the brand's distinctive personality and tone of voice. Of course the emotional side of the brand does shine through the brand's marketing

mix. There is the now famous pack copy that reads like a mini-magazine full of jokes and stories, and the caps that, instead of having 'use by' dates printed on them, invite us to 'Enjoy by'. Then there are the distinctive promotions, such as the bottles wearing knitted hats to raise money for Help the Aged, and the recent 'Buy one, get one tree' packs.



**Innocent drinks has been lauded for its marketing techniques, but the heart of its success is a great product.**

However, when I visited Fruit Towers to meet Innocent's creative genius, Dan Germain, what struck me was how central the product was in the company. A great product is the foundation of the brand's success, and at the heart of all it does. When I signed the visitor book, I was asked to write my name and company. But I was also asked my favourite smoothie flavour.

The receptionist then invited me to help myself from the fully stocked fridge of smoothies.

Looking round the open-plan office I could see that most of the people working there had done just that. This sounds simple, but many companies seem to be staffed by marketing people who don't use the brand's products unless they have to. Here are some of the ways the company invests in creating and keeping the focus firmly on product.

- Hiring top food scientists as 'fruitologists', specialising in a specific type of fruit and how to get the tastiest ones. They are experts in where to source the best fruit and the effects of seasonality on fruit taste.
- Monthly blind-testing of products against competition are used to ensure Innocent stays ahead of the game, and especially own-label products.
- Upgrading the existing flavours to make them even better, such as adding 'six extra strawberries' in the strawberry and banana one.
- Having a kitchen right in the middle of the office, where new recipes are created, and where anyone in the company can roll up their sleeves and have a go.
- Looking for new and interesting fruits, such as those in the new Superfruit range that have extra functional, health-related benefits.

## **2. Leave the Ladder in the Garage**

The biggest problem with the laddering approach is the risk of us creating emotionally-based communication with no link back to the product. This creates 'sponsored entertainment', where people remember the execution more than they do the brand. A

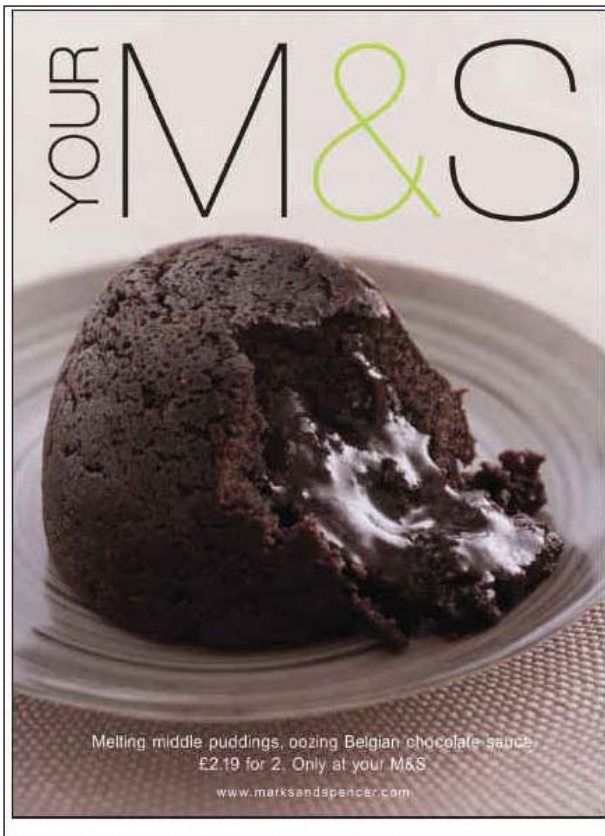
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more effective approach is where the functional and emotional sides of the brand work together and reinforce one another. This involves finding a product truth and then telling a story about this in an emotionally involving and impactful way.

### Marks & Spencer

One of the best examples of communication combining sausage and sizzle is the hugely successful relaunch of Marks & Spencer, a story sold by marketing director Steven Sharp at a Marketing Society event earlier this year. The 'Your M&S' campaign was part of the relaunch that helped drive full-year profits to April 2006 up from £505.5m to £745.7m.

Sharp told how the first stage of the campaign featured food products, where M&S had always been strong, and in particular *that* chocolate pudding. The 'food porn' advertising lingered over oozing chocolate and dripping butter, using a memorable piece of music and voice-over to boost recognition and appetite appeal, increasing sales by 288%. Communication on the clothing range with Twiggy and friends only started in force a year later, after redesign work on the range had been completed. Again, this had emotional appeal, but it was built of a great product range.



**Food porn? Ads for this chocolate dessert increased sales by 288%.**

### Lush

The potency of combining sausage and sizzle is also shown by brands that have grown with little or no advertising. The Innocent brand discussed earlier is one of these, with sales now over the £100 million mark. Another example is the Lush brand of 'Fresh, Handmade Cosmetics'. Its products are unique on several dimensions, being made by hand, highly indulgent, not tested on animals and free of chemical preservatives.



**Lush stores perfectly reflect the brand personality.**

The brand's personality and tone of voice flows from these product truths, which work to reinforce them. Each product has a picture of the person who made it on the pack or, where there is no pack, on a sign in the store, strengthening the communication of the handmade nature of the brand. As with Innocent, much attention is paid to the copy used to name and describe products. For example, the Haagenbath is described as 'a refreshing minty, pink, slow-fizzing, creamy bath bomb with grated chocolate bath melt for extra skin softening'. And the brand's product story and personality is also dramatised in activation activity, such as the campaign 'Packaging is rubbish'. Lush store staff promoted the fact that 75% of all Lush products are 'naked', with no packaging, by going to work dressed in nothing but a branded apron!

### **3. Stretch selectively**

The right discipline is to launch products that not only fit with the brand idea, but also actively dramatise and reinforce it to deliver added value. One way of helping ensure the brand stretches selectively and correctly is to define the 'product DNA' (as well as the brand DNA) – the features and attributes that every new product should have.

For many years Dove had plans for a deodorant. However, it launched the product only when it was able to combine top odour protection with the brand's trademark skin mildness and one-quarter moisturising cream. Many of Lush's customers asked the brand to make a toothpaste, and the company saw a clear business opportunity. However, the launch did not happen, as the team could not find the right supplier who had a product with ingredients that had not been tested on animals.

The other important question is, of course, how effective the new extension will be at driving growth. It is tempting to launch extensions that are believed to be 'great for the brand image', despite being small in sales. This rarely works in reality. Producing 'dwarf' products steals attention and resources from the core business. Better to focus on fewer, bigger extensions that grow the brand by growing the business, such as Pampers' Active Fit nappies. These provided improved wetness protection for babies who are starting to crawl. The launch helped the brand grow its share of the UK market by 10%, at the same time as dramatising the brand idea of 'Being with you every step of the way as your baby develops and grows'.

### **4. Grow the core**

Stretching more selectively is one way of delivering more substance. However, even better is growing the core business.

The first challenge in growing the core business is sticking to what made you famous in the first place, while updating the

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brand to make it fresh and relevant for today. James Bond is a good example of a brand that has done this. The latest movie, *Casino Royale*, smashed all box office records for the Bond franchise, with the opening UK weekend take of £13 million up 40% on the previous high. A look back over the history of the Bond brand shows how a number of key equities have been maintained and refreshed.

- The 'brand proposition' of 'Bond beats the baddie' is still there, though Bond is not directly 'saving the world' as in some other films. This time it's a battle of wits with a terrorist banker.
- Girls: still lots of beautiful women, but Vesper Lynd continues the trend of being a smarter, stronger Bond woman, not just a pretty face.
- The catchphrases: some of these are still here, but used in a creative way. After a near-death experience, a barman asks Bond if he wants his Martini shaken, not stirred. Daniel Craig replies, 'Do I look like I give a shit?'
- Hard man: this Bond is a rough and tough killing machine. The violence is a lot more real, and we even see Bond being bruised and beaten.



**James Bond: a brand that has been refreshed and strengthened.**

The other trick in growing the core is to redirect the creativity used in launching new products onto finding ways to activate new users and/or usage occasions. This approach helped the Axe/Lynx brand boost its business by 20% in Latin America. The team there saw that consumption per capita in one market (Argentina) was much higher than another (Brazil). When they dug into the data, the reason seemed to be young guys spraying their whole body, not just under their arms. This led to a campaign called 'Spray More, Get More', which encouraged all-over usage with the promise of, er, more sex.

**WHAT GETS IN THE WAY?**

The steps proposed above may seem obvious and merely the application of common sense. However, a quick look at the marketing going on today is enough to show that they are not being applied consistently. So, what gets in the way?

As mentioned earlier, emotional branding is definitely the flavour of the month, and much more fashionable than going back to

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basics and getting the product right.

But a bigger issue is the old problem of how little time marketers spend in a job. Firing the ad agency and making a splashy new ad that raises your profile is a more attractive option than the hard work of fixing the product when you know you will be onto your next job in a year or two.

And things get even worse when you move into the world of service branding, such as financial services. Here the changes to service culture and infrastructure take many millions of pounds and years to take effect, requiring more stamina than most of us possess. This is especially true when in reality many 'marketing' jobs in big service companies are actually communication roles, with ownership of the actual service proposition sitting in other functional silos.

### **Substance not Spin**

Ultimately, as with most of marketing and business in general, delivering more substance and less spin comes down to leadership. If you lead a product brand in a consumer goods company, you can make a huge difference to the way the brand is run, constantly challenging your team to ask 'Where's the sausage?'

The individuals behind two of the highest-profile global marketing stories of recent years, Dove and Persil/Omo ('Dirt is Good') were both proactive in asking to stay much longer than the normal couple of years on their respective brands. Another common theme is the passion and conviction they had for their brands, and the way they drove this through the whole marketing mix, including product innovation and packaging, not just communication.

The challenge in service businesses is harder, but not impossible, as shown by the leading role played by Steven Sharp at M&S and Tim Mason at Tesco. In addition, a CEO who believes in substance not spin is crucial, as is the case with Stuart Rose and Terry Leahy respectively.

But whatever level in the businesses we work at, we all have a role to play. And the next time we find ourselves 'doing a Hugo', we can choose instead to ask 'Where's the sausage?'

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