

SINCE 1777

BADGER

**WELCOME
TO THE
COUNTRYSIDE**

Category

1.1: Brand Identity - design and implementation costs over £100,000

Design Consultancy

BrandOpus

Client

Hall & Woodhouse

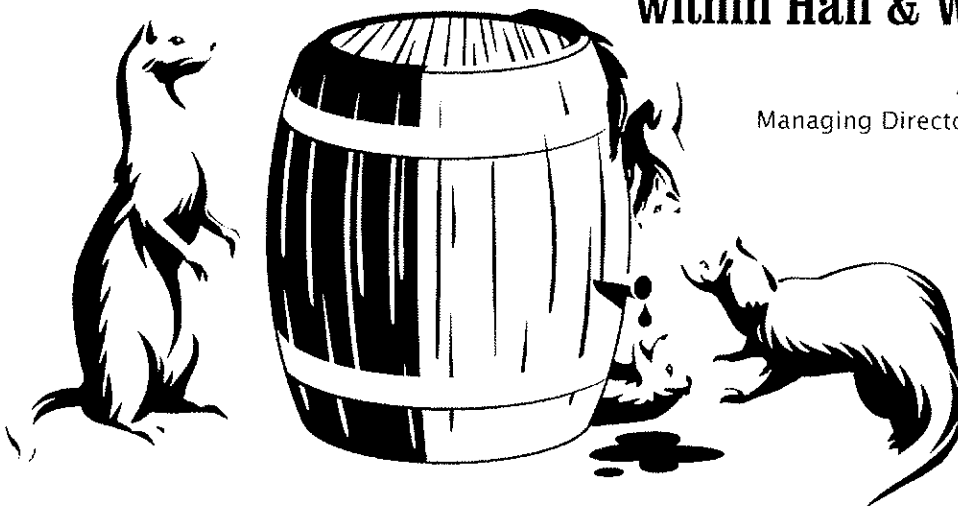
Date

June 2013



“BrandOpus have brought the countryside to our beer brand’s identity in an original and engaging way. The new Badger design framework has given structure to our range of award-winning beers, whilst also creating differentiation by style and occasion to help consumers navigate the range and find their favourite. The clear, consistent yet flexible identity has brought success to new bottle and cask beer launches as well as internal initiatives within Hall & Woodhouse.”

Anthony Woodhouse,
Managing Director, Hall & Woodhouse



EXECUTIVE SUMMARY

Based in Blandford St. Mary, Hall & Woodhouse is an independent family brewer and pub owner, owned and managed by the fifth generation of the Woodhouse family.

Established in 1777, the company created the Badger brand in 1875. At the time of brief Badger was the 4th largest beer premium bottled ale brand in UK retail. But with big ambitions to grow, a need for a refreshed and unified Badger brand presence was identified. BrandOpus were commissioned to create a new identity and activate it across a vast span of off-trade, on-trade and corporate touchpoints.

Building on the brand's unique and ownable 'Countryside' positioning, BrandOpus reworked the Badger identity to emphasise the rural roots of the brand. The result has seen a significant impact on sales, both in retail and in the pub, as well as a significant increase in awareness of the Badger brand amongst the target audience, and a higher propensity for the existing consumer to explore the wider Badger portfolio beyond their favourite brew.



Badger snuffles out success, in the supermarket and in the pub

31 Days Until return on investment was reached

£1.7m Growth in sales in retail

16.2% Increase in sales of Badger in Hall & Woodhouse pubs following the brand identity redesign

The redesign contributed to **£1.7 million growth in sales** of Badger Ales in retail, and based on retail sales figures alone, **return on investment was achieved within 31 days.**

The success contributed into the on-trade environments too: following the brand identity redesign, there was a **16.2% increase** in sales of Badger in Hall & Woodhouse pubs.



EXECUTIVE SUMMARY CTD.

The Countryside takes over the category

Nº.3

Number 3 bottled ale brand

The redesign allowed the brand **new & increased listings** in the majority of major multiples

Elements of the redesign have enabled the Badger to **reduce spend & carbon footprint**

Badger is now **number 3 brand** in the Premium Bottle Ale market, a rise of two places following the redesign, and exceeding objectives set, the redesign has allowed the Badger brand to achieve **new & increased listings** in the majority of major multiples, whilst elements of the redesign have enabled the Badger to **reduce spend & carbon footprint**.



Thirsty business

35%

Higher spend per customer on Badger since redesign

9%

Increase in repeat purchase rate since full redesign was implemented

40%

Increase in value loyalty to Badger bottled ale since full redesign implementation

Customers are **spending 35% more** on Badger, the repeat purchase rate has **increased by 9%**, and value loyalty to Badger bottled ale has **increased by 40%** since the full redesign was implemented.



PROJECT OVERVIEW



Description

Hall & Woodhouse, based in Blandford St. Mary, Dorset is the largest family brewer of packaged premium ales in the UK. Under the brand name of Badger, Hall & Woodhouse brews some of the country's most distinctive bottled ales such as Badger Tanglefoot and Badger Fursty Ferret. The Badger brand prides itself on producing a wide range of beers to suit all tastes, brewed with care by the dedicated, experienced Dorset-based team.

Badger bottled ales are available nationally in leading supermarkets and off-licences and the cask range is available on-trade exclusively within Hall & Woodhouse pubs.

With the total beer market in volume decline, Hall & Woodhouse decided that the focus for forthcoming years should be the fast growing bottled ale category. Hall & Woodhouse set an ambitious target to grow the ale market with their award-winning premium bottled ales and cask ales.

At the time of brief, Badger was the 4th largest premium bottled ale brand in the UK. However, there was a barrier to growth and achievement of goals set:

The brand had some extremely successful individual ales, but the problem was that Badger lacked a branded presence on shelf. Consumers were buying their favourite ale at an individual level, with variants such as Tanglefoot and Fursty Ferret becoming more famous than the Badger brand.



PROJECT OVERVIEW CTD.



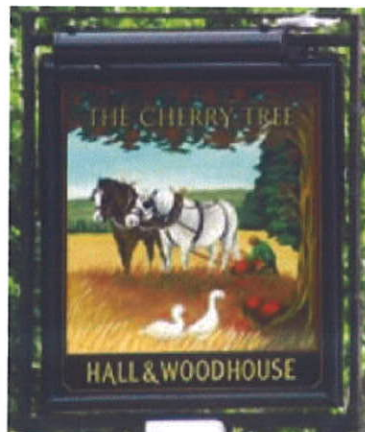
The problem was that the brand was acting as an endorser with no role, and the portfolio had no structure to help consumers navigate.

People weren't exploring the Badger portfolio because nobody knew there was a portfolio – they just knew the individual ale they purchased regularly. This meant that other less known variants in the portfolio struggled in sales and therefore listings.

There was also a significant opportunity for Badger to improve the brand presence on-trade. In the pub consumers were confused about the role between the brewer, Hall & Woodhouse, and the ale brand, Badger.



Confusion in the relationship between the Badger and Hall & Woodhouse on pub signage.



Recessiveness of the Hall & Woodhouse name - opportunity to bring an easily identifiable brand equity to the fore.



Without a single-minded brand identity, the result was inconsistency and consumer confusion, particularly within the pub environment, as shown in these beer mats & pump clips



PROJECT OVERVIEW CTD.



Previously the Badger identity was applied as a 'badge' on branded materials, and the 'countryside' theme was represented by a generic landscape that was indistinctive from other brands with country provenance, such as Yorkshire Tea.



PROJECT OVERVIEW CTD.

Outline of Project Brief

To redesign the Badger brand identity across the current range of nine bottled ales, off-trade point of sale materials and multipack containers, on-trade items including pub signage, pump clips, beer mats, bar runners and other assorted materials, and finally Corporate materials including lorry livery, uniforms, corporate collateral and social media presence.

Specifically, the brief was to:

- 🐾 Establish a role for the Badger brand and create a presence on shelf.
- 🐾 Create an ownable bespoke bottle structure.
- 🐾 Create a framework for the brand, which encourages consumers to explore the wider range and world of Badger: a shift to brand-led rather than variant-led sales.
- 🐾 Reflect the brand's countryside provenance and Dorset roots.
- 🐾 Grow sales to become a Top 3 premium bottled ale brand.
- 🐾 Enhance Hall & Woodhouse pubs with the Badger proprietary brand to increase on-trade sales.
- 🐾 Make Badger a standalone brand with less reliance on goodwill from the Hall & Woodhouse parent brand.

Size of Design Budget

£119,525

Project Launch Dates



March 2011
Brand identity launches on the redesigned Hopping Hare variant.



August 2011
The redesigned wider range hits the shelves.



Summer 2012
The badger identity is introduced to proprietary pub signage, materials and point of sale.



September 2012
New bottle structure introduced.



PROJECT OVERVIEW CTD.

Overview of Market

Whilst Hall & Woodhouse remain the only top 5 UK brewer that is independently owned and managed, at the time of brief the UK ale market was dominated by well-known and group owned breweries with big marketing budgets, or individual ales such as Morland's Old Speckled Hen, Fuller's London Pride and Greene King IPA.

Smaller breweries such as Thornbridge and Meantime were starting to grow and gain listings in mainstream multiples and opened up the marketplace to different ale styles. Thus generating a quirky brewery-led brand appeal, as opposed to the consumer buying individual ales regardless of the brewery.

The smoking ban and recession have resulted in a change in consumer purchase trends with increasing numbers of consumers drinking at home. At the time of brief, bottled ale was the only sector of the ale market that was in growth.

Consumer segmentation research conducted by Hall & Woodhouse at the time of the brief identified the increasing importance of the female shopper purchasing bottled ale for home consumption. The female shopper represents a 31% share of the market but is not an ale consumer herself: the purchase is for her partner. Therefore, the challenge posed was to help the non-expert ale shopper to understand the offer, and be able to navigate the portfolio of beers and choose within the range.

The other key consumer of Badger and its competitors was identified as male, aged 35-60 and likely to be living with female partner. The challenge with this consumer was resistance to change, with a determination not to be affected by marketing.



PROJECT OVERVIEW CTD.

Outline of Design Solution

Identity

Through the development of a distinctive identity, which built upon the brand's roots, BrandOpus evoked the brand proposition of 'countryside ales'. The iconic identity exists within a flexible framework of the countryside foliage. On pack, this framework creates an ownable device used across the portfolio to create consistent brand architecture.

Whilst the Badger identity is heroed on pack, the central space allows the flexibility to demonstrate the individual personalities of the unique ales, all of which exist within the countryside through rural themes.



Print and Poster Advertising



PROJECT OVERVIEW CTD.

Packaging

The core range is represented by a series of illustrated animals, designed to reflect the characters of the ales, whilst the higher ABV 'ales to savour', are brought together by countryside pursuits in deep jewel colours.

The countryside characters have taken on a more dynamic role within the label's central space, whilst the brand framework is adapted to the personality of the ale, taking on the colours of the central design. Constants, such as the paw print detailing the beer ABV, sit within the frame to enable easy navigation of the information on the bottle.



2010



2011



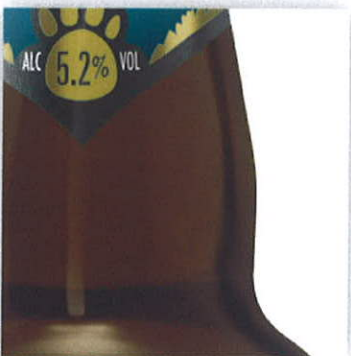
2012



PROJECT OVERVIEW CTD.

Previously the bottle structure was generic, tall and uncharacteristic, not ownable or unique. The profile of the bottle was addressed first, with the flaring out of the neck and a broadening of the shoulders to be more distinctive in the category.

Building on the 'Countryside' positioning, a thick step base with a premium feel was created so the bottle seems to be rising out of the hillside. These rolling hills run around the bottle to create a cohesive world, creating a brand-blocking effect on shelf. The embossed leaves were included to perpetuate the graphics used. This new structure includes an asymmetrical label holder, so that the label fits perfectly into the structure, ameliorating the uniqueness of the bottle with this unusual feature.



PROJECT OVERVIEW CTD.

Ranging strategy in the off-trade



Following the establishment of a role for the brand, and how this would work on pack, the ales have been tiered within the framework to enable the consumer to navigate the portfolio and encourage them to explore the range.

The core range is represented by the countryside animals. The premium ales are represented by countryside pursuits and use a richer, jewel-like colour palette to distinguish them as a discerning choice.

On-trade, in the pub

Off pack, the leaves and foliage from the frame are used as distinctive equities. The Badger always exists within the countryside framework.



Pub Signage

POS: Brewer's Choice - Bottle Holder



Pewter with aluminium insert pump-clip

PROJECT OVERVIEW CTD.

Reusable pump clip - Industry first

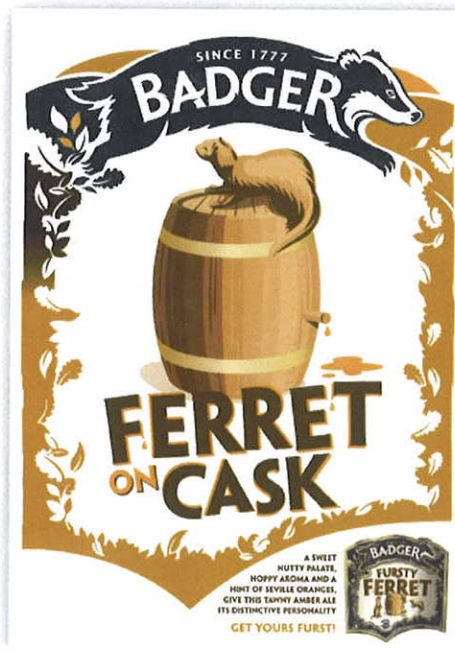
In an industry first, BrandOpus used the countryside framework to create a reusable pump clip for use at the fixture, in the pub. The Badger framework has been reworked to allow an aluminium insert to slot in, and be changed as the ale on tap also changes. In line with the bottled ale redesign, tasting notes are also mounted at the back of the clip for the publicans reference.



PROJECT OVERVIEW CTD.



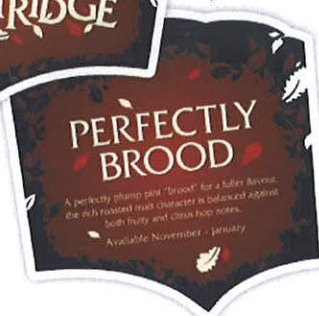
The newly shaped 'rolling hills' framework becomes an ownable design element that can be used elsewhere, e.g. glassware.



Seasonal Ale Posters



Drip Mats

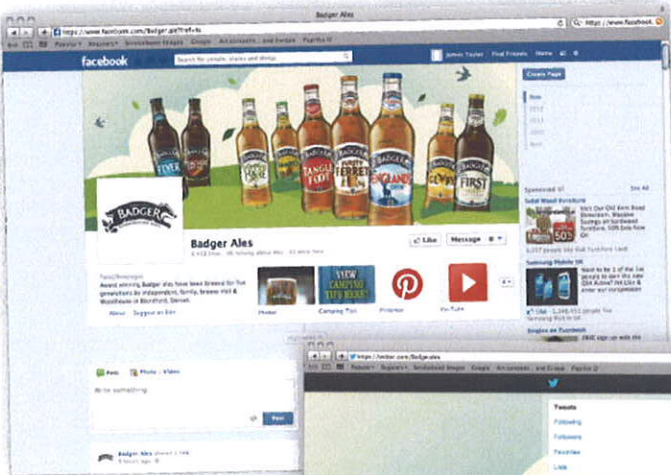


The Badger brand is brought to life consistently across all touch points. Following the quirky personalities established through the design of the individual ales, this jovial tone of voice is used on point of sale material to activate the brand, always through the established framework and role of the brand.

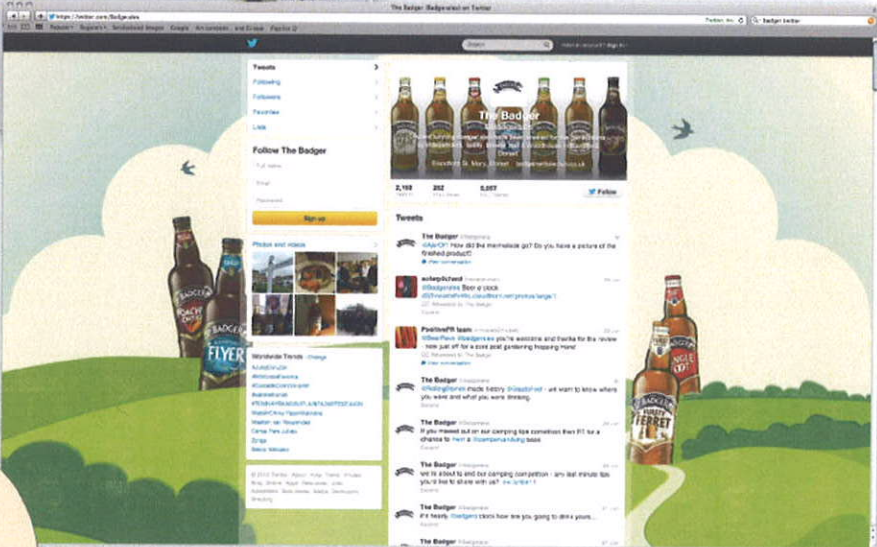


PROJECT OVERVIEW CTD.

Online and beyond



Badger Facebook & Twitter Pages



Badger Uniform



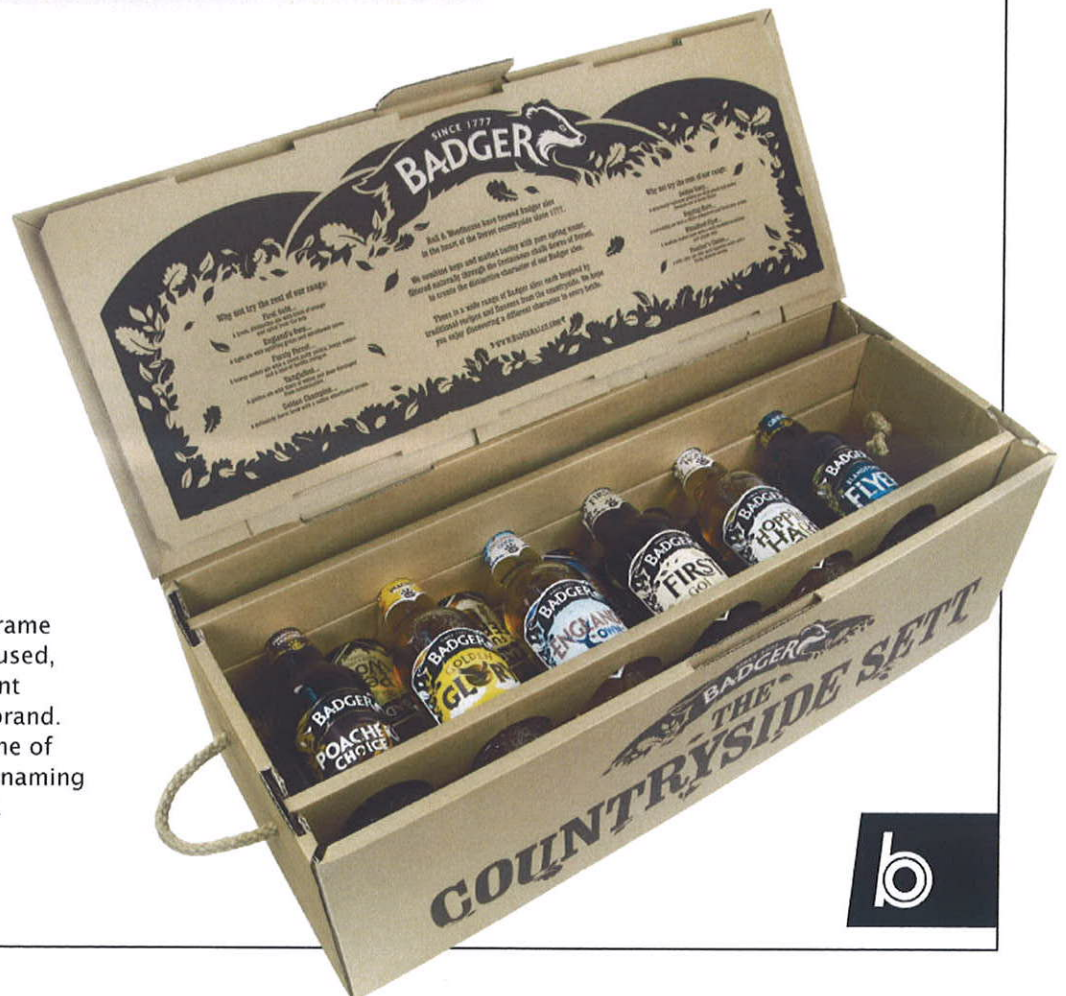
Badger Beer Garden at the Hampton Court Flower Show



PROJECT OVERVIEW CTD.

Brand Activation

The multipacks are designed within the Badger countryside framework and use a raw card finish and rough two colour print, delivering the rural brand positioning.



The equities of the frame and foliage are also used, delivering a consistent presentation of the brand. The playful brand tone of voice is used via the naming of 'Countryside Sett'.

(499 Words)



RESULTS

Increases in Sales: On-trade

- ✓ **Objective:** Enhance Hall & Woodhouse pubs with the Badger proprietary brand to increase on-trade sales.

Hall & Woodhouse have seen an increase in average monthly seasonal ale sales in the public houses where Badger is available on cask since the introduction of the new branded ale pump clip.

- 🐾 On average pubs have sold **881 containers per month** versus an average of 758 month before the redesign.
- 🐾 This is representative of a **16.2% increase in sales**.
- 🐾 This works out at **4,428 more pints of beer** sold each month since the new Badger identity was introduced.



Increases in Sales: Off-trade

- ✓ **Objective:** To create a framework for the brand, which encourages consumers to explore the wider range and world of Badger: a shift to brand-led rather than variant-led sales.

- 🐾 The redesign contributed to a **£1.7 million growth in value sales**.
- 🐾 The volume of Badger an average bottled ale customer buys per year has **increased by 16% since redesign**.
- 🐾 Average bottled ale customers are **spending 35% more** on Badger since redesign.
- 🐾 Vivaly, Badger bottled ale sales are now in **both value and volume growth**.

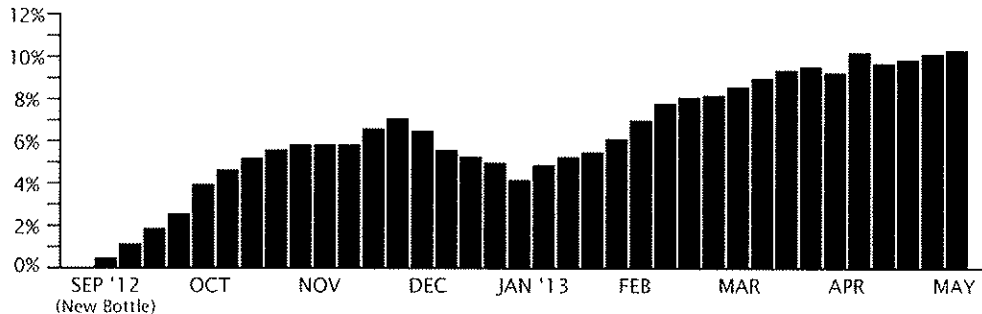


RESULTS CTD.

✓ Objective: Create an ownable bespoke bottle structure

- 🐾 The number of times per year that an average bottled ale customer buys Badger has **increased by 9%** since the new bottle structure was introduced.

Hall & Woodhouse Bottled Ale
Rolling MATs % Value Change



ROI

Based on off-trade sales alone, **return on investment was achieved in 31 days** following the redesign.

This doesn't even account for the success of the brand identity in the pub environment, or the **incalculable PR and marketing opportunities** that the unified brand identity has allowed.

Market ranking

✓ Objective: To grow sales to become a Top 3 premium bottled ale brand

- 🐾 Badger is **now number 3 brand** in the Premium Bottled Ale market, achieving on objectives set, and allowing the brand to jump from 4th position previously held.



RESULTS CTD.

Easily navigable brand architecture

- ✓ **Objective: To establish a role for the Badger brand and create a presence on shelf.**

The brand architecture is broken down into four tiers, which are denoted by bottle colour, naming and design features. The advantage is **easier navigation around the portfolio for the consumer.**

New product development

The improved brand hierarchy also affords the brand a logical platform for NPD that allows the brand to expand its product offer.

- 🐾 The redesign has **allowed Badger to release three new products** so far with more to follow.



Halo Tier
Collector's Edition



Limited Edition Tier
Rare Beasts Range



Premium Ales



Core Range



Entry Level



RESULTS CTD.

Press coverage attributable to design

✓ **Objective: To make Badger a standalone brand with less reliance on goodwill from the Hall & Woodhouse parent brand.**

🐾 The creation of the 'Halo' tier of promotional and PR friendly products has allowed Badger to **achieve significant coverage in the press** that would otherwise have been impossible on the strength of design alone.

As a PR tool the Badger Collector's Edition 2012 has been a resounding success:

🐾 The ale was selected as the beer to be paired with one of the courses at the Guild of Beer Writer's annual awards dinner, **affording the brand valuable exposure** at one of the most prestigious events of the year.

🐾 The bottle has achieved **over 150 pieces of PR coverage**, across trade, industry, and marketing press.



A selection of the coverage received by the Collector's Edition in the media.



RESULTS CTD.



Platform for new ventures

The creation of a natural and countryside inspired habitat for the brand, that harks back to its Dorset roots, **allowed the brand to expand into new marketing activities** to better reach the target consumer that would previously have been impossible without a consistent, strong and easily recognisable brand identity.

Other brand activities include the Hampton Court Palace Flower Show Badger Ales Garden in 2012. This featured a branded tasting area that handed out samples equating to **53,808 male and female consumers exposed to the Badger brand.**



RESULTS CTD.

Increases in Market Distribution: On-trade

Due to the flexibility of the interchangeable pump clip, Badger is now able to offer 2 additional season ales per year on tap in Hall & Woodhouse pubs.

Increases in Market Distribution: Off-trade

The premiumisation of the Blandford Flyer & Poacher's Choice variants through design, allowed the brand:

- 🐾 **New listings** in Tesco.
- 🐾 **Increased distribution** in Sainsburys.
- 🐾 This generated **£1.3m incremental sales** over the course of the last year.

The redesign of Badger Hopping Hare allowed the brand:

- 🐾 **Increased distribution** in Sainsburys.
- 🐾 A **new listing** in Co-op.

Changes in Consumer Attitudes & Behaviour

Indications are that Badger customers are broadening their repertoire within the portfolio rather than choosing another competitor brand: Badger as a percentage of their bottled ale spend has increased, indicating that they are **buying more Badger per customer and more frequently** since the brand identity redesign.

Customer Loyalty

- 🐾 Following the redesign, loyalty to Badger bottled ale **increased by 35%** in comparison with the previous year.
- 🐾 This has **increased further** since the introduction of the new bottle structure.
- 🐾 Value loyalty to Badger bottled ale has now **increased 40% in total** since in the 22 month period since the new design hit the shelves, indicating that this is an **ongoing positive trend rather than short term buzz**.



RESULTS CTD.

Improved engagement with the Badger core target audience

- ✓ **Objective: Reflect the brand's countryside provenance and Dorset roots.**

In studies following the launch of the new brand identity, the core target audience found Badger products "unequivocally more artisan and niche" than Badger's core competitors.

The core target audience has welcomed the new identity and countryside proposition wholeheartedly. Qualitative comments capture how the relationship between Badger and its Dorset provenance have been established with the brand identity:

"It's made in Dorset, it's put together in Dorset, it's brewed in Dorset and it has a real taste of Dorset when you drink it."

Studies into the shift in perceptions of the brand within the target audience expressed very positive associations:

"Created with passion - by beer lovers first and foremost THEN sales."

"It just feels right... local, crafty, made in bespoke fashion in a couple of sheds - not an enormous factory with stainless steel vats."

The shift in where the consumer perceives the Badger brand to sit within the competitive market has shifted significantly: Following the redesign the Badger brand is grouped with brands thought of as more 'artisan' and 'niche'.



RESULTS CTD.

When asked to express the human personality that the redesigned bottle represents, the target audience found the Badger brand "strong, relevant and powerful". They expressed that they feel respected by the brand, which they feel has integrity, personality, sense of humour and which doesn't take itself too seriously.

- 🐾 Warm
- 🐾 Witty
- 🐾 Likeable
- 🐾 Credible
- 🐾 Clever with words
- 🐾 Laid back

"I think Badger comes across as taking you as a consumer seriously. In a way, I think it is good that they take you seriously because you're then encouraged to try the product without feeling patronised, without feeling talked down to."



"slightly eccentric uncle - warm but interesting."

"Approachable, normal bloke in street - not pretentious, doesn't take self too seriously, easy to get along with, easy going, playful."

"Makes you feel important - as if catering for you, feel involved."



"natural conversationalist, witty, but understated."

An objective of the brief was to create a quirky, memorable design, which gave an indication of the attention and care that goes into the brewing process within this family-owned business.

It is rare that consumers directly reference back the original points of the brief within unprovoked feedback, but overwhelmingly, this was the case with the Badger redesign:

"I mean the Badger logo itself is nice, it is clear, it is white on black, it is very consistent. I think the point was made by looking at the back of the label, which is probably the second thing I do after seeing the front of the label to learn more, it shows they are serious about what they brew but there is still perhaps a bit of quirkiness in the design or some of the writing. It doesn't just indicate that, 'this is another beer product we've knocked out', you know, it seems that they've actually thought about what they're doing here."



RESULTS CTD.

The introduction of ale tasting notes within the design was **much appreciated by consumers**:

“I like spicy foods and want beer to go with it... I don't know if you've noticed on the back they have that, kind of, bars of bitter and sweet and hoppy and I quite like that. So I would look at those definitely as well.”



Back of pack

Indeed, all studies showed that the **consumer felt strongly positive** about the Badger redesign at the point of purchase. When asked to give feedback on the Badger bottled ales, retailed in major multiples, consumers referenced and praised all elements of the redesign:

- 🐾 **Strong and consistent identity whilst retaining clear delineation**
- 🐾 **Great names, clarity of names**
- 🐾 **Quirky, interesting, engaging labels**
- 🐾 **Tone of voice – respectful, involving**
- 🐾 **Back of pack stories and relevant information**
- 🐾 **Neck ‘support’**
- 🐾 **Clear Badger branding**
- 🐾 **See through glass – immediately clear reference to type of beer**
- 🐾 **Quality look and feel**
- 🐾 **Flavour referencing**

Improvements in Green Credentials

The brand redesign allowed and prominent countryside positioning afforded BrandOpus the flexibility to choose recycled, natural and raw substrates for Badger packaging wherever possible. This has **enabled the brand to reduce its carbon footprint**.

As well as the achievement of an **industry first**, with the creation of the reusable pump clip BrandOpus allowed the brand to make significant cost savings due to the reduction in spend on expensive pewter pump clips, and **reduce waste and environmental impact**.



OTHER INFLUENCING FACTORS

Badger used no promotional price points on-trade.

Off-trade, promotions were less than other competitors within the category.

PR support was used to facilitate the Badger garden at Hampton Court Palace Flower Show.

SOURCES

Homescan data, June 2013

IRI data, 52 week to w/e 31.03.13

Nielsen ScanTrack data to w/e 27.04.13

Hall & Woodhouse internal sales data

DCRM 278 research study, May 2013



DECLARATION



On behalf of BrandOpus

Nir Wegrzyn
Managing Partner

A handwritten signature in black ink, appearing to read 'Nir Wegrzyn', written over a faint, larger version of the signature.

The Charlotte Building
17 Gresse Street
London
W1T 1QL

On behalf of Hall & Woodhouse

Anna Corbett
Brand Manager

A handwritten signature in blue ink, appearing to read 'Anna Corbett', written over a faint, larger version of the signature.

The Brewery
Blandford St. Mary
Dorset
DT11 9LS

