HOW M&S PLANT KITCHEN HAS HELPED PLANT BASED EATING GO MAINSTREAM

Client: M&S Plant Kitchen. For Publication DBA Design Effectiveness Awards entry – October 2019



EXECUTIVE SUMMARY

Plant-based eating is one of the fastest growing consumer trends in the Western world and one that is spurring a variety of innovative new categories, propositions and brands.

Indeed by 2017, it had moved from being an ethical lifestyle choice to a common-sense healthy eating approach for a growing number of 'flexitarians'. 91% of Britons have adopted some flexitarian behaviours, with 22 million people reducing their meat and diary intake.

M&S saw an opportunity in this movement and in July 2018 asked us to work with them to launch their very own plant-based brand. They needed to act quickly. Tesco had been hot off the mark launching their own label plant-based Wicked Kitchen range in January 2018. They were the first major conventional supermarket to do so. M&S, which prided itself on being an innovator, had found itself on the back foot.

With the consumer barrier to plant-based being the perception that vegan food doesn't taste great and is boring, M&S felt uniquely positioned to tackle this head on, thanks to their heritage in delivering quality delicious foods and innovation.

They had developed an extensive range of 60 plant-based foods stretching across: ready meals, meat substitutes, Deli, desserts, milks, sandwiches, wraps and salads.

Our task was to create a brand identity that would appeal to the masses with a range of flavourful plant-based foods.

Taking inspiration from street food, we created a dynamic and cosmopolitan vegan brand. M&S Plant Kitchen powerfully communicates the benefit of 'unleashing the power of plants' using an ownable, category-defining blue. The result is an exciting, youthful brand with an Instagram-ready attitude which comes to life both on and off-pack.

It's been a great opportunity to attract a younger customer base, put M&S into the heart of the contemporary craft movement that's making British cuisine so vibrant and to re-assert its longstanding heritage as an authoritative innovator – easily, affordably and just in time for Veganuary 2019

Since launching the brand, Plant Kitchen has delivered an incredible REDACTED CONFIDENTIAL DATA sales of which 60% are incremental, with marketing investment in Plant Kitchen paying back within 4 weeks.

It has also brought a new generation of customers to M&S with 1.5m customers unique to Plant Kitchen and 1 in 5 customers making at least 2 repeat purchases in the first 3 months. By July 81% of customers who have purchased the brand came back for more.

Moreover, the brand has even achieved greater penetration than DBA award winning Tesco Wicked Kitchen, with 1.5% household penetration vs 0.5% for Tesco Wicked Kitchen. This is particularly impressive given M&S's lower distribution, with 1043 stores nationwide compared with Tesco's 3961.

Customer and media feedback has been phenomenally encouraging: Quote from the Grocer:

"By investing in a fully-fledged plant-based development, accompanied by perfectly positioned naming and branding, M&S has reasserted its strengths in own-label and has justified the time lag behind competitors."

We're proud to have worked with such a well-loved retailer to champion a movement towards delicious plant-based food for everyone.



CONTEXT & OVERVIEW

OUTLINE OF PROJECT BRIEF

Plant-based eating is one of the biggest changes we have seen in food in recent years. It is one of the fastest growing consumer trends in the Western world and one that is spurring a variety of innovative new categories, propositions and brands. And as it moves from being an ethical lifestyle choice to easy, commonsense healthy eating for a growing number of 'flexitarians', it's pretty clear that vegetarianism and veganism are here to stay.

M&S saw an opportunity in this movement and in July 2018 asked us to work with them to launch their very own plantbased range. They needed it quickly so that it could be on-shelf just in time for the new year – a time when we all want a little healthiness.

The range consists of 60 plant-based food products stretching across:

Fresh & ambient convenience meals Meat substitutes Deli products Chilled desserts Nut based milks Sandwiches, wraps and salads It also included an inspiring selection of grain packs, tofu and soy protein products to create your own delicious recipes with.

BUSINESS OBJECTIVES

- To capitalise on the growing plant-based/vegan food trend
- To grow the M&S vegan offer to appeal to mass market with a unique competitive advantage of flavour/taste/no compromise across a variety of eating occasions
- Bring new people/younger demographic to M&S stores

DESIGN OBJECTIVES

- Create a brand identity to launch M&S's new range of plant based foods, deliciously tasty and full of flavour: no compromise
- Target i) Flexitarians first and foremost
 ii) Vegetarians & Vegans
- Distinctive vs other M&S food ranges & key plant based competitors
- Ownable to M&S with unique/distinctive/ownable assets
- Convey M&S food values freshness, innovation & quality
- Modern & positive
- Works across product categories

Claire Richardson, senior product developer, M&S, said:

"Some people think meat-free food is dull but this couldn't be further from the truth, it's experimental and it's delicious. We've created a collection that will appeal to everyone – whether you're a longstanding vegan, want to lead a more flexitarian lifestyle or you love meat but think cauliflower popcorn sounds amazing! It's all about delicious tasting food first."



CONTEXT & OVERVIEW

DESCRIPTION

M&S has always prided itself on bringing the best the world offers, to the masses, at everyday fair prices, innovating through the ages with seam free ladder resistant stockings and hatching the first chilled chicken in the 1960's.

Its advertising in the OO's underscored M&S's food quality, with mouthwatering visuals and Dervla Kerwin's voiceover: 'This is not just food this is M&S food...' raising consumers' expectations of what good food looks and tastes like.

M&S already had a dedicated Vegetarian range, and offered 'suitable for vegan' chilled products sitting within the current M&S foods portfolio. However, there was no specific range for plant based/vegan diets.

A dynamic shift in healthy eating propositions moved 'veganism' from the preserve of the rebellious teenager to a desire for plant-based eating for a growing number of flexitarians.

Yet, in 2018 Tesco had become the first major conventional supermarket chain in the UK to launch a comprehensive private label range of vegan meals. Created by Derek Sarno who runs the blog Wickedly Healthy, a line of 20 Wicked Kitchen meals launched into 600 stores at the beginning of 2018.

M&S, which had previously prided itself as an innovator, found itself on the back foot.

OVERVIEW OF THE MARKET

After many years in the doldrums, 2016 marked a major turning point for the meat free food market. Volume sales increased 22% over 2015-18, accompanied by value growth of 34% to £740 million. Yes, there had been an increase in the number of people becoming vegan (up from 150,000 0.25% of the population in 2014 to 600,000 1.6% of the population in 2016). And a huge interest in veganism in general. According to Google Trends online vegan searches have quadrupled in the 5 years between 2012 and 2017, now getting almost 3 times more interest than vegetarian and gluten free searches.

However, the pivotal point has been the rising number of flexitarians, with 28% of people cutting back on their meat intake in the six months to Mar-17 (Mintel).

Lifestyle trends have helped; meat free has seen stellar growth, with consumers choosing a plant-based diet for a number of reasons. Health concerns around unprocessed and processed meat consumption have been heightened in recent years. A report published by the World Health Organization in October 2015 identified processed meats as carcinogenic and linked red meats to possibly being carcinogenic too, putting the dangers of meat-heavy diets firmly on consumers' radar

In addition, campaigns such as Meat Free Monday and Veganuary have encouraged consumers to cut out or cut down their meat consumption. One quarter of evening meals eaten in the UK are vegetarian or vegan (Kantar Worldpanel Jan 2018). 91% of Britons have adopted some flexitarian behaviours with over 22m people classing themselves as 'full time flexitarians' (people who are reducing their meat and diary intakes) – Mintel, 2017.

Health is now the top reason given for people choosing to adopt a plant based/vegan diet at 76%, along with animal welfare (68%) and sustainability (56%).



CONTEXT & OVERVIEW

The rising profile of plant-based foods has also been helped by the popularity of vegan street food stalls such as The Temple of Seitan chicken shop which has delivered tasty & convenient dirty 'vegan' food for the first time. High street brands such as Pret A Manager have also opened dedicated vegetarian & vegan stores and vegan markets and restaurants have been popping up everywhere.

Whilst many of the supermarkets had the odd vegan product and some vegetarian offerings it wasn't until Tesco launched Wicked Kitchen in Jan 2018 that any retailer had a dedicated plant based range to meet the growing demand.

Waitrose had created a veggie and vegan destination area in chilled in 2018 but it was a mix of brands and OL. Asda's Vegetarian and Sainsbury's Love your Veg ranges were not exclusively plant based. There had been a flurry of new vegan brands launching in the UK such as Vivera and Natruli, but they tended to be quite functional, failing to deliver in terms of deliciousness, taste and flavour.

Whilst coming late to the party, with their heritage in quality delicious foods and innovation M&S felt uniquely positioned to

tackle head on the consumer perception that vegan food doesn't taste great or is boring. They had been diligently working behind the scenes to create a range that would cover every day products: from nut milks for breakfast, sandwiches for lunch, convenience meals and soy meat substitutes for dinner and sweet treats for in between. Moreover it didn't need to always be about rainbow colours, light as a feather portions or virtuous healthy eating 365 days a year. There would be beet burgers and falafels and mushroom stroganoff for healthy weekdays, and dirty vegan comfort food for weekend treats.

It would also be the launch pad for exciting high street firsts such as cauliflower popcorn, vegan coleslaw, sourdough woodfired pizzas and mac cheese bites.

With Kantar Worldpanel research 2017 showing that 'Millennials are the largest demographic who are trying a plant based diet', it was also an ideal opportunity for M&S to broaden its appeal to a younger target audience.



OUTLINE OF THE DESIGN SOLUTION

Coming to us in July 2018, with the launch planned for Veganuary 2019, we took them from category opportunity to launch in no time flat.

Using Visual Planning[™] we looked to define an interesting and ownable visual territory for the brand that would appeal to flexitarians - not just hard core vegans. Wicked Kitchen was already playing into the slightly punky 'veg with an edge' design world of Thug Kitchen, appealing to those taking more of a moral stance.

M&S wanted to be more inclusive and celebrate all the deliciousness of plants.

THE DESIGN

Taking inspiration from street food, we have created a dynamic and cosmopolitan brand for M&S Plant Kitchen that powerfully communicates the benefit of 'unleashing the power of plants'. It taps into 2 powerful learnings from neuroscience: that we are drawn to things that are novel, but have relevance or salience, and those that have a sense of humanity. We have developed a category defining blue for the brand that stands out against other M&S offerings but has a foodiness and earthiness about that gives relevance. The choice of distressed background, torn parchment paper and hand stamped brand mark give a sense of real people behind the product.

The result is an exciting and youthful brand whose Instagramready attitude comes to life as effectively off-pack as it does on the wide range of delicious meat and dairy-free plant-based ready meals, salads and snacks that make up the range. The pack design ensures the range overcomes the main barrier to adoption of plant-based food options – perception of taste – by celebrating the natural goodness of plants with a bold brand marque stamped directly onto a distressed blue background. The design also conveys a positive, upbeat attitude to help the new range stand out, and places an emphasis on the contemporary craft movement that's making inroads in British cuisine.

Whilst the brand name doesn't scream Vegan (to avoid alienating flexitarians), the name Plant Kitchen was chosen as it clearly puts plants centre stage.

As part of the launch it was also exciting to be offering the ready meal range in 100% recyclable trays, a move away from nonrecyclable black plastic. The first range to rollout as part of M&S Plan A. The brand even goes to the lengths of using 100% vegan glue in all the packaging.

The key equities, photography style and tone of voice we developed have been used across all touch points for the range; POS, website imagery and copy, outdoor advertising and 10s YouTube ads.

LAUNCH DATE: January 2019. DESIGN FEES: REDACTED CONFIDENTIAL DATA.



The design has been very well received and consumers have responded positively to a range that feels unapologetic and full of flavour.

Plant Kitchen has grown the M&S Vegan Offer

Having a dedicated plant based brand has been a profitable business move, driving incremental sales.

Since launch the range has delivered REDACTED CONFIDENTIAL INFORMATION in sales of which 60% are incremental. (Source: M&S Food Sales Figures, Sept-19)

The marketing investment in Plant Kitchen paid back within 4 weeks (at a Gross Margin level).

Plant Kitchen has brought new and younger customers to M&S

The brand has driven footfall into store.

- 1.5 million unique customers have come instore to purchase from the range (M&S Food Customer Insight Data 2019)
- Nearly 1/3 of Plant Kitchen customers were new to M&S Food (M&S Food Customer Insight Data 2019)

bringing a new and younger generation of customers to M&S. Plant Kitchen is most popular with young & female customers, with a young pre-family twice as likely to buy Plant Kitchen vs. other M&S foods products.

Penetration of the vegan market and overall households within the UK has also been extremely effective.

 The brand has achieved greater customer penetration than any other longer running supermarket vegan range with 1.5% household penetration vs. 0.5% DBA award winning Tesco Wicked Kitchen

This is particularly impressive given that M&S has lower distribution than Tesco, with 1043 stores nationwide compared with Tesco's 3961 stores (Sources: Statista 2019).

The brand has also driven repeat purchase

The new M&S Plant Kitchen design is not overpromising, but fits well with the product proposition driving repeat purchase across the range.

- More than 1 in 5 Plant Kitchen customers made at least 2 repeat purchases during the period Jan – March-19
- 81% of customers who purchase the brand come back for more (Source: Brand Health Tracking July 2019)

M&S Plant Kitchen is appealing to flexitarians

The brand is appealing to those customers looking to reduce their meat intake.

According to M&S Food Sparks Loyalty Programme March-19, 84% of Plant Kitchen buyers have also bought meat in the last 12 months and 40% baskets also contain meat products, indicating the branding has been successful in attracting our flexitarian target customer.

The Plant Kitchen brand has proved a successful vehicle for the launch of NPDs

Plant Kitchen launched a number of product innovations under this brand:

a) Cauliflower Popcorn was a first to market, tastes as moreish as a chicken nugget and is the top selling Plant Kitchen line b) Plant based Sourdough Woodfired pizzas which use a real, live Sourdough culture (which no other retailer does) give a lovely chewy texture and delicious sour flavour c) Mac Cheese bites – an oozy, gooey 'cheese' filling with macaroni which you would think is cheese d) The first vegan Coleslaw on the market, building on M&S market leading position in coleslaw

Feedback from influencers has been extremely positive:

The Grocer reported:

"There's something for everyone...How does it stack up against other own label vegan ranges? Plant Kitchen feels more hearty, grown-up and accomplished. It's worth the wait. Competitors have either taken an uber-healthy route or they have rushed products to the shelves and left flavour as an afterthought".

M&S has received The Vegan Friendly High Street Retailer award 2019 from PETA for its new Plant Kitchen range and fashion products for "keeping step with the burgeoning demand for animal-friendly options and for helping to move Britain in a kinder and more sustainable direction with its easily identifiable 'vegan' labelling." (Yvonne, Taylor, Director of Corporate Projects PETA)

OTHER INFLUENCING FACTORS

The brand launched instore in January 2019 to coincide with Veganuary. It was given dedicated bays with POS using the newly developed brand assets.

Was success down to the increase in the number of people following a flexitarian diet?

Whilst the number of people declaring themselves to be flexitarian has increased in the UK over time, up from 28% in 2017 to 34% in July 2018 (Source Mintel 2019) today there are a number of brands and own label offerings that consumers could look to satisfy this growing interest. One in 6 food products launched in the UK in 2018 had a vegan/no animal ingredients claim, with the UK toppling Germany from its number one spot for the first time. (Mintel Jan 2019)

The fact that consumers are choosing M&S Plant Kitchen over others is therefore down to the appeal of the proposition and branding rather than lack of alternatives. Animal Aid Campaign Manager, Tod Bradbury, said in a statement sent to Plant Based News.

"Marks & Spencer have certainly gone that extra mile to ensure that their offerings of plant-based foods are extensive, exciting and easy to identify.... When veganism is presented as something that is normal, those who may be a little sceptical are more inclined to give it a try."

Was success down to the products launching in Veganuary?

Whilst consumers would have been in a more receptive mindset to cut down on meat at this time the success of the launch has extended beyond Veganuary. Moreover, consumers could have chosen plant based products from other own label retailers such as Tesco's Wicked Kitchen. Arguably it was down to the brand proposition and branding that consumers chose to buy Plant Kitchen.

Was success down to marketing support?

There was no national TV campaign on terrestrial channels to support the launch. Outdoor, social media across Facebook, Twitter, Instagram and YouTube all showcased the mouthwatering products using brand assets we created.

M&S celebrity panels on its YouTube channels, print and PR articles similarly worked to raise awareness of the range and leveraged the brand assets. Moreover, the brand identity instore would have sealed the deal at the moment of decision instore, convincing flexitarians to choose a plant-based product over a meat-based one.

Was success down to price promotions?

The Plant Kitchen range has never been sold on price promotion.

Was success down to the products themselves?

No doubt people are buying the products, not necessarily the brand, especially as there were a number of market firsts: namely, cauliflower popcorn and vegan coleslaw.

However, the nature of branding is to package up the product offering in an appealing way and with so much time and care taken in developing the range, M&S needed branding that would do the products justice.

With the primary target being flexitarians the branding needed to encourage consumers to choose a plant-based product over a meat based one. It needed to convey delicious plant based food, no compromise. We are proud to have received their positive endorsement.

Simon Brady, Head of Food Brand and Design, M&S, said:

"We wanted to give the packaging the same nurture and care as we give to the product, and we feel this fresh and forwardthinking design does just this, while fitting snuggly into the wider M&S Food brand."

The fact that 84% of buyers were also previous or current buyers of meat products shows the effect of branding in taking plant-based eating mainstream.

SOURCES

Mintel 2017, 2018, 2019 IRI Data 2019 M&S Food Sales Figures Sept 2019 Brand Health Tracking July 2019 Statista 2019 The Grocer Google Trends Kantar Worldpanel 2017, 2018 M&S Food Customer Insight Data M&S Food Sparks Loyalty Programme March 2019