



Category

3577 - Food Products

Client

Pipers Crisp Co.

Design Consultancy

BrandOpus

Submission Date

June 2015

“We’re thrilled with the new identity and pack design that BrandOpus have created for our brand. Pipers now boasts better on-shelf stand out, with a design that reinforces our approach: making Britain’s tastiest crisps through teamwork and the best quality ingredients.

The feedback from clients and consumers has been overwhelmingly positive, and the redesign has been the catalyst for the tremendous growth in sales of Pipers Crisps ”

Alex Albone, CEO, Pipers Crisp Co.





**year on year
growth**



**111.3%
increase
in sales**

EXECUTIVE SUMMARY

Pipers pride themselves on the artisan, handmade crisps that they have been supplying the most discerning, independent only, outlets with for the past eleven years.

But with their signature design devices being poached by the competition, and amidst downbeat feedback from customers and a delisting from prestigious stockist Harvey Nichols, Pipers decided it was time to review their packaging and use it to underline their passion for making crisps.

The Lincolnshire based company tasked BrandOpus in 2012 to reinforce the perception of Pipers as the tastiest crisp brand in Britain by discovering what makes the brand unique, and to develop a bold and assertive identity and pack design, which reflects the honest, straightforward ideals of the company allowing Pipers to own the 'out of home' crisp market

Top of the spuds

After the redesign launched, Pipers saw a **huge sales increase of £3,994,605** in just three years. That's representative of a **111.3% increase in sales** versus the old design, and a phenomenal **119,784 kg in new orders**. But perhaps most importantly, the redesign was the only variable factor affecting the business at this time, and has allowed Piper's to achieve a whopping **25% year on year growth**.





days to return
on investment



manufacturing
costs reduced by



EXECUTIVE SUMMARY CONT.

A-peeling design

The redesign allowed Pipers to **reduce manufacturing costs by 10p per pack** on average. The brand appeal following the redesign allowed Pipers to command a **5% increased price point** too. The new look has helped Pipers to over double their number of stockists since the redesign, and Pipers are **outselling competitors in the on trade by 33.3%**.

Crunch time

But perhaps the most poignant results of the redesign are the **44 new jobs** created by the increased customer orders following the redesign. The Pipers management team, initially dubious about the ability of design to accelerate their brand were blown away by the results of the project, which **achieved return on initial design investment in just 10 days following launch**. Three years on, **ROI is a phenomenal 14,400%**. And not a single penny has been spent on any other kind of consumer advertising at all.

Words: 342

PROJECT OVERVIEW

Description

Pipers Crisps was established in 2004 by farmer Alex Albone, with a single vision to make Britain's tastiest crisps. Pipers team of 38 staff hand-select the best locally grown potatoes, remove just enough skin, slice to the right thickness and then batch cook them by hand in pure sunflower oil. When the crisps are still warm, Pipers then season them with ingredients carefully selected from producers who care as passionately about the quality of their products as Pipers do about theirs. The result is irresistible crisps as they should really taste.

Right from the start, Alex made a pledge to never stock Pipers in big supermarkets, saying:

"I'd rather sell to the village shop where you buy your daily newspaper; the café where you pick up your morning cup of coffee; the sandwich bar where you buy your lunch and the pub you head to for a pint in the evening. Those small, independent businesses are passionate about what they sell. I want to give them something unique to put on their shelves."

Pipers put real dedication into every single pack they make, and into their relationships with the independent stockists that sell them, and the company is used to the inevitable competition from other hand-cooked crisp brands that are stocked in major multiples. But despite this, eight years after launch, Pipers were receiving underwhelming feedback from existing customers who felt that there was nothing to differentiate the brand, and little incentive for stockists to choose Pipers over a competitively priced alternative. In addition to this, the brand had suffered a delisting from the high-end Harvey Nichols delicatessen.

Outline of Project Brief

Pipers are a premium crisp with a price point to match, but after 8 years in the market place they were beginning to lose market share to competitors, and their customers were telling them face-to-face. Their design traits were being poached by the competition: use of primary colours, the style of photography and the 'made by farmers' message was no longer unique within the market place. This was particularly obvious with the Tyrells, Fairfields and Corkers brands.

Pipers was losing its excitement and so the company approached BrandOpus with a brief to:

- **Redesign Pipers Crisps, visually defining the brand and developing a brand story**
- **Reinvigorate the brand, strengthening relationships with existing customers**
- **Attract new customers, and grow sales of Pipers Crisps by 15%**



before



after

PROJECT OVERVIEW CONT.

Overview of Market

Crisps are a popular part of British food culture, and despite the tougher economic conditions of the past few years the growing hand-cooked premium crisp market has risen by 20% in the last year.

Pipers is part of the bagged snacks category, which is measured by Nielsen at retail and is valued at £2,700m. It is in 1.1% growth and within bagged snacks, the premium crisps market, of which Pipers is a part, accounts for 24.9% of sales. The difficulty for Piper's is that the majority of the competition it faces is from supermarket-stocked brands such as Kettle, Tyrells and Burt's, but private label also poses a threat accounting for 1/5 of sales.

However, as Nielsen only measures sales at major multiples, and not independent and on trade retailers, brands such as Pipers Crisps which are only stocked through independent avenues are not accounted for in this figure. For this reason it is particularly important that Pipers' packaging design expresses its point of difference.

Launch Date	Size of design budget
February 2012	£27,500

Words: 573

Outline of Design Solution

BrandOpus recognised that to differentiate the multiple taste award-winning company from the competition, Pipers needed to have a role on the pack above and beyond the product itself.

The agency differentiated the brand, drawing out the unique, quirky elements that make Pipers recognisable and distinctive. The brand name was evolved to Pipers Crisp Co. to make it more ownable, by moving away from category generics and repositioning the brand as a specialist in crisp making. The logo was placed at the focal point of the pack to drive the presentation, while the Piper was established as the quirky masthead, anchoring the brand into the natural and rural provenance of the crisps

BrandOpus developed a colour palette for the brand, which allows clear navigation across the portfolio, making it easier for the loyal consumer to select their favourite flavour, and allowing stand out that encourages new consumers to buy the brand. The flavour descriptors across the range of seven variants were updated to focus on origins, illustrating just how much care and attention has gone into sourcing the tastiest flavours possible

Words: 184

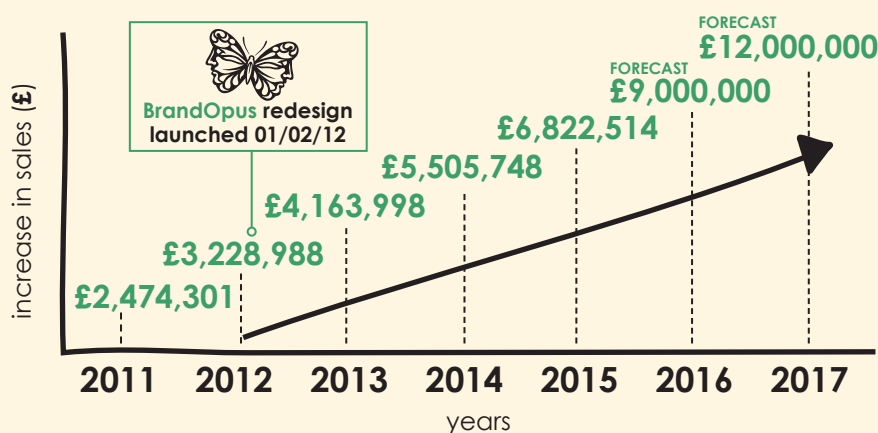


SUMMARY OF RESULTS

Increase in sales

Pipers Crisps sales have **increased by £3,994,605** in just three years since the redesign. That's representative of a **111.3% increase in sales**.

The impact of the redesign on the business was immediate: turnover had **increased by 46%** on previous year after only one month on shelf!



New sales **equate to 2,994.605** more bags of Pipers crisps sold since the redesign, versus sales during the same period prior.

Within the first three months of the redesign, Pipers saw a huge **31.7% increase** in customers

Total new orders equate to **119,784kg** more potatoes required to keep up with demand following the redesign.

Increased market share

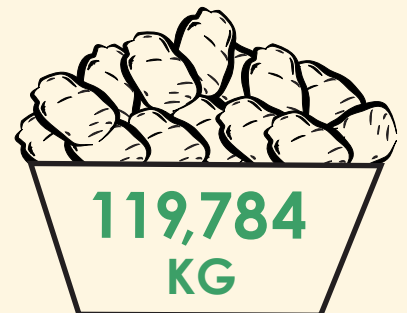
In the on trade, or pubs as the majority of us know them, the rest of the premium crisps category averages 60 packs sold and income of £65 per outlet per week, Pipers punches above it's weight, with an average of **80 packs** sold at a total of **£87.20 per outlet per week**.

This means that Pipers sell an average of **33.3% more value** and **34.2% more** units than the competition.

This is all the more impressive given that prior to the brand redesign Pipers didn't sell enough on trade to even feature in the index...

Pipers has gone from being outside of the running, to become a top 3 leading stocked range, as ranked by stocking outlets.

sales have increased by



more potatoes required

SUMMARY OF RESULTS CONT.

Increased market share

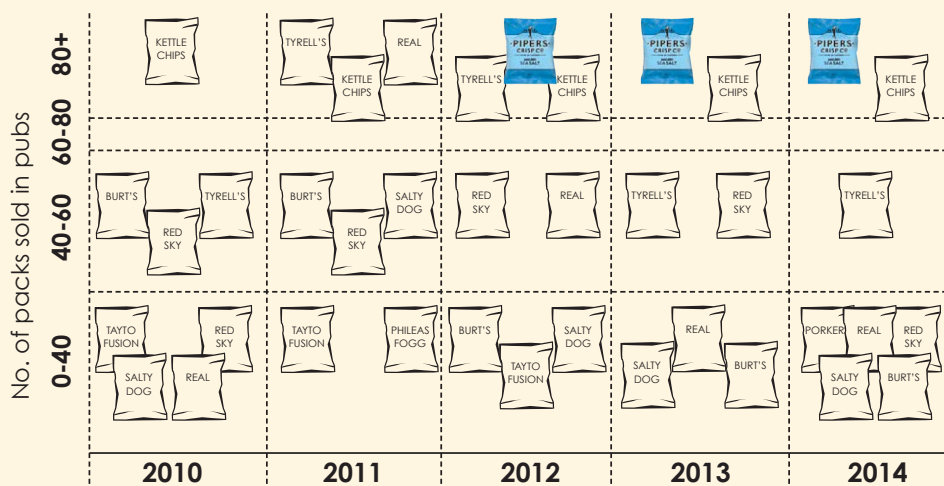
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Unit Rate of Sale



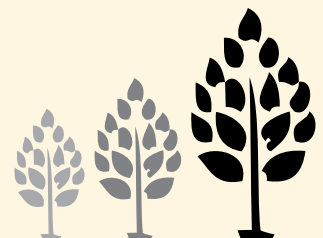
(Source: CGA Snack Index August 2014)



10 days until return on investment

0p

spent on any other consumer advertising



25% company growth each year (since the re-design)

Return on investment

The redesign of Pipers Crisp Co. achieved a **return on investment within 10 days of launch**.

The original design fee has been repaid back **over 145 times** since the redesign launched.

Without a single penny spent on any other consumer advertising!

Increases in production in response to demand

The increased demand for Pipers Crisps following the redesign has meant that the factory has made the move from two-shift to three-shift days, and 24-hour production.

Business growth

Design allowed **25% company growth** each year since the project launched. Pipers have had to respond to demand for their delicious crisps by opening **2 new distribution sites**, and adding **6 more vans** to their fleet, to make sure no customers are left crisp-less and disappointed.

SUMMARY OF RESULTS CONT.

Creating jobs for local people

At the time of the redesign the Lincolnshire area was suffering the highest unemployment since benefit records started in 1984, and numbers of local people without jobs was continuing to rise.

However, the move to 24-hour production of Pipers has created **44 valuable new jobs** for local people in the area around the Lincolnshire factory.

Increased listings & significant new business wins

Perhaps the biggest impact on the company has been the massive increase in stockists following the redesign. With brand awareness at an all time high, Pipers have had to up production to respond to the increased customer demand.

It's worth pointing out again that Pipers set out in business with a policy never to work with major multiples, instead focusing on independent stockists that allow them to focus on the quality of the product.

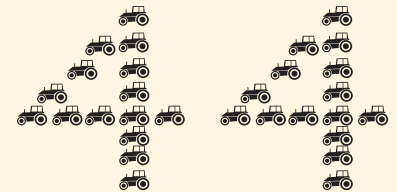
On the strength of the redesign, Pipers have won business with:

659 more independent grocers, delicatessens and retailers

51 more food service networks

1018 more breweries and pub stockists

That's an uplift of **101.3%** increase in stockists in just three years since the redesign launched. These listings have enabled Pipers to be associated with some of the most famous and prestigious names in hospitality and grocery, including:



new jobs
for local people



increase in
stockists in
just 3 years

SUMMARY OF RESULTS CONT.

Reduced production costs

The previous pack design was manufactured in Greece which meant long lead times and stocking issues because Pipers were slow to respond to increased stockist orders.

Now Pipers packaging is manufactured in the UK meaning a **huge 50% reduction in lead times**, allowing the company to be much more agile in response to demand, and meaning a smaller carbon footprint to boot!

The photography on the old design meant that Pipers packaging could only be printed using gravure technique. Following the redesign the packaging only uses a three-colour Flexo printing method, meaning a **5% reduction in manufacturing costs** with the same high-quality finish. This equates to a **cost saving of 4.5p** on 40g bags and a **10p saving** on 150g bags of Pipers crisps.

Increases in market share

As Pipers Crisp Co. has a policy to only stock in independent retailers, it's really tricky to get market data to understand changes in penetration, cross purchase and other marketing metrics that big brands use. Independent companies like Pipers rely on evidence and gut instinct to understand how the land lies.

Interestingly, at the time of the redesign, Pipers Crisp Co. had just four big competitors. Now, following on from the phenomenal success that the brand has witnessed following the redesign, there are 32 brands in the category, indicating that the Pipers redesign has **contributed towards category growth, increased consumer awareness and desire for hand cooked crisps.**

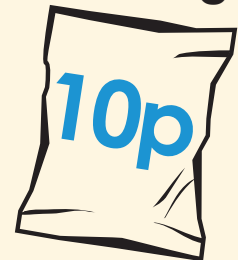
And whereas other hand cooked crisp brands rely on new product development and advertising to generate interest and drive sales, Pipers are quite resolute...

The brand has only introduced one new flavour, Chorizo, since the redesign.

And crucially **hasn't spent a penny on any other form of consumer advertising** at all.

50%
**reduction in
lead times**

cost saving of



on 150g bags

SUMMARY OF RESULTS CONT.

Export growth

But the story doesn't end at the British borders. Pipers Crisps are now available in **11 new global markets**, including France, Germany, Italy, Holland, Denmark, Malta, Switzerland, Greece, Spain, Ireland and Poland.

Although global sales growth has never been a key focus for Pipers, the redesign has generated international stockist interest that has allowed the brand to win **£500,000 worth of new business**.

Changed perceptions of the brand

This spate of international demand prompted Pipers to conduct brand perception research with consumers and stockists within global markets to see if any design considerations were required to make the product more easily understood by international consumers.

The response was overwhelmingly **in favour of the current design**, in fact the key words the audience picked out to describe the packaging design mirror the original brief to BrandOpus:

Increased price point

The new look packaging has allowed Pipers to increase their price point by 5% with no impact on stockist uptake, indeed the brand is attracting new stockists all the time.

And although Pipers don't set a recommended retail price for their customers to sell their crisps on at, since the redesign the average price point across all retailers has increased from £0.80p to £1.20 per 40g bag.

This means that the power of brand design has enabled independent grocers and pubs to **increase their profit margin by 40p** per unit sold – a **50% increase** versus prior to the redesign.

It's also worth noting that Pipers Crisps sell at a **3.4% average higher price point** than the rest of the premium crisps market.



11 new
global
markets



SUMMARY OF RESULTS CONT.

Buyer testimonials

"We love Pipers crisps at Benugo! We believe in natural food and Pipers crisps are just that. The new packaging suits their quality brand and we're proud to be selling them in our shops."

Fiona Ryan, Marketing Manager, Benugo.

"When I first saw the new packaging for Pipers crisps, I felt that it was sleek and quietly tasteful. A bit like their approach to making crisps, in fact! The packaging presents the crisps perfectly to our customers; little additional marketing is required. On display they look classy, and as equally at home on a champagne bar or a hog roast one. The colour palette is complementary, so the packs sit well together, whilst the colours still remain indicative of the bag's contents - even though this is clearly displayed on the packet, with a small taste of the provenance of the flavour. So in a word, tasteful!"

Bruce A J McLauchlan, Procurement Advisor, Creative Events.

"Since your rebrand Pipers crisps have become even more popular at The Royal oak. Already a best seller, the new styling has met a niche, and allowed us to increase sales during the current difficult financial times due in no small part to the awful weather we are experiencing. I think this style change has taken an already great product to a new level. Please keep up the good work and your constant effort to be one step ahead as this helps us all."

Neil McCulloch The Royal Oak Fritham.

"The packaging is fresh and vibrant modern and self-explanatory. Crisps selling really well."

Barn Farm Plants, an outlet that has recently placed order and hadn't previously since sometime prior to 2011.



Other Influencing Factors

No other marketing activity took place over the period of the redesign. As Pipers Crisps are not stocked in major multiples, and are only available in discerning independent outlets, the company is largely off the radar of traditional EPOS data tracked by Nielsen and Kantar.

Resources

- Lincolnshire Economic Briefing, Lincolnshire Chamber of Commerce, September 2011
- Pipers internal YOY sales data
- Nielsen data first published in The Grocer in December 2014
- CGA Snack Index August 2014