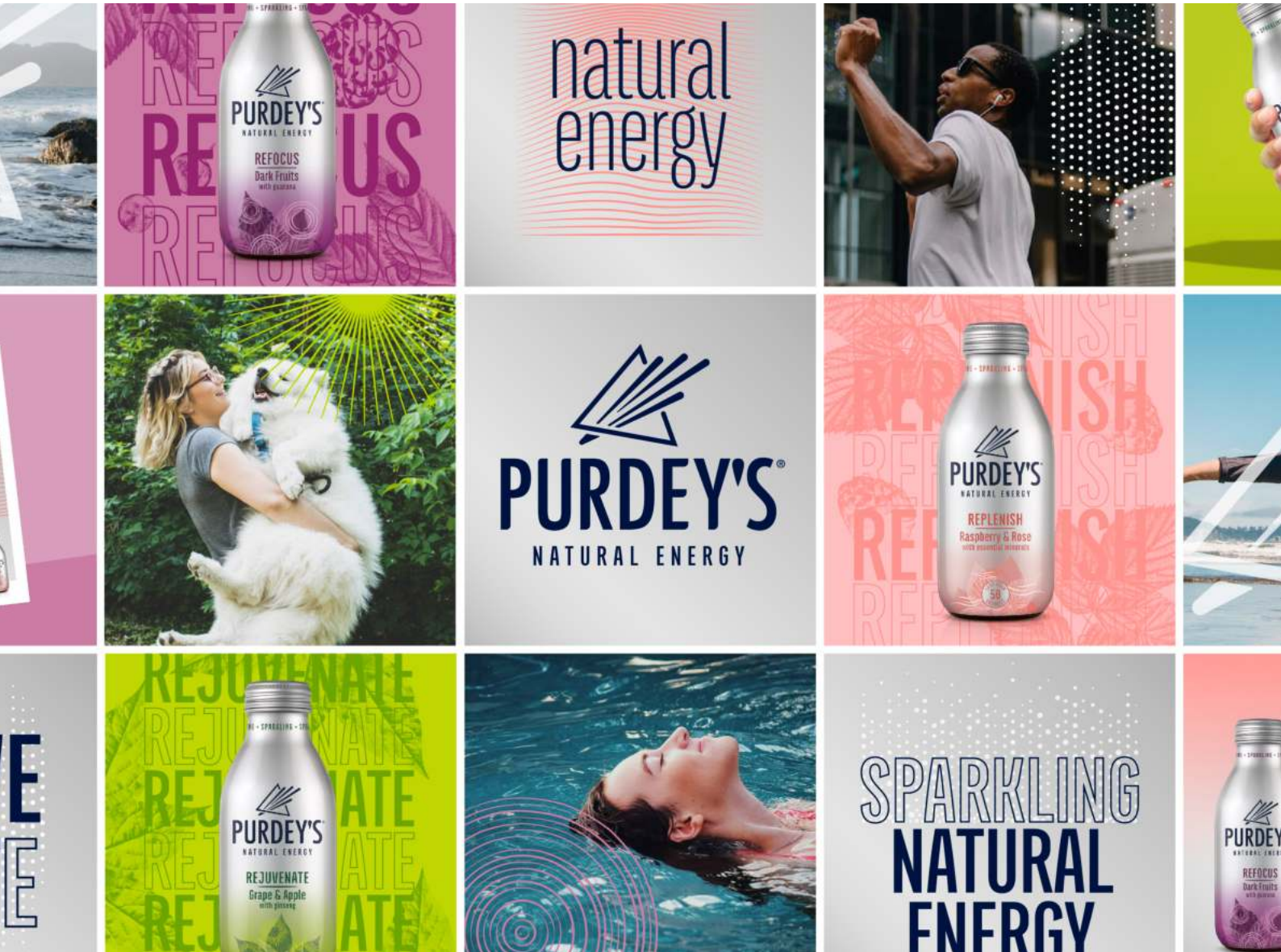


PURDEY'S BRAND REDESIGN

For publication

Purdey's

DBA Design Effectiveness Awards entry - 2022



EXECUTIVE SUMMARY

Originally a rejuvenating tonic for musicians, Purdey's quickly became known as a lifestyle drink. However, after being bought by Britvic in 2001, they started to move away from this, looking to position themselves as more of a natural alternative to traditional energy drinks.

The brand wanted to grow from being a niche market player to becoming a more accessible brand and a leader in the functional wellness space. In order to do so, the brand would need to:

1. Increase value sales
2. Increase market penetration
3. Increase distribution

The brand's plans for growth were derailed by Covid. The market Purdey's most relied on – instant consumption – fell 31% in value.¹ Purdey's themselves fell 23% and on top of that, lost major distribution channels, including both Morrisons and Asda. The brand's objectives didn't change, but the challenge to achieve them was now harder.

Purdey's had previously struggled with communicating the brand's three key messages, that it's natural, delivers delicious taste and offers a gentle, energising lift. The brand's packing was a key tool to convey these messages to consumers both on and off the shelf.

The drinks wellness sector was beginning to see a number of start-ups offering various functional benefits. Purdey's needed to differentiate from the crowd. But to grow it

needed to become more accessible, whilst maintaining its premium status. The brand's packaging had a strong role to play in both of these key objectives.

To both meet these objectives and null the various threats and challenges posed by market shifts and new competitors, the re-design set out to:

- Stand out amongst competitors on-shelf
- Bring more taste credentials through
- Remain simple enough that the product benefits and attributes were understood
- Offer flexibility for new variant creations

The scope of work included new visual identity system, new brand mark and packaging design across 3 x SKUs

Results post redesign:

- Purdey's value spend per point of distribution increased from £1,500 in 2019, to £2,100 in 2022.
- Brand penetration grew 88% against the backdrop of large distribution losses – such as Asda and Morrisons – demonstrating the power of the redesign.
- Distribution grew +20% in the L12wks²

¹ Nielsen IQ 52 weeks 24.09.2022

² Purdey's



CONTEXT AND OVERVIEW

Background and Brief

First launched in 1988 as a rejuvenating tonic for the musicians of Abbey Road studios, Purdey's developed a rich heritage as a lifestyle drink with botanicals & multivitamins, long before the functional energy drink category had exploded and anyone in the UK had been "given wings."

Purchased by Britvic in 2001, Purdey's had a small but loyal following; the brand had steadily grown in the 3 years prior to the redesign project, taking on the traditional energy market by playing up a 'natural energy' positioning and operating within the emerging 'functional wellness' category. Britvic were looking to continue growing the brand by retaining its premium positioning but making it more accessible to consumers.

Our business objectives were to:

1. Increase value sales
2. Increase market penetration
3. Increase distribution

However, as soon as work began on a redesign, covid hit. Being a predominantly single serve brand, Purdey's felt the impacts more than others – the instant consumption market (Purdey's heartland) fell 31% in value and 29% in volume. Purdey's themselves fell 23% in value and 24% in volume.³ At the same time, Purdey's also lost distribution entirely with Morrisons and half of their distribution with Asda.

The brand's plans for growth didn't change based on covid, but the challenge had got significantly harder.

Purdey's still needed to grow awareness and understanding of who they were with a more mainstream audience. On one hand, it was felt that the brand's packaging was simply not accessible and lacked personality. On the other hand, the packaging wasn't communicating the brand positioning as a natural alternative to traditional energy drinks. The issue was that this wasn't being communicated by the packaging. Research showed that Purdey's wasn't communicating well enough the key benefits of taste, natural ingredients and energising benefits. The brand was at risk of sitting too close to higher-octane and caffeinated products, its distinct proposition being overshadowed. There was a clear need for the brand to craft its own unique space, distilling Purdey's identity and purpose.

In addition, it was felt that the brand's packaging was simply not accessible and lacked personality.

³ Nielsen IQ 52 weeks 24.09.2022





CONTEXT AND OVERVIEW

Market Overview

The functional wellness category is defined as ready-to-drink drinks claiming to, and containing ingredients, that provide functional benefits for mind or body, excluding sports & energy drinks. With a total revenue of £240.2million, it only amounts to 2.7% of the overall soft drinks market.⁴ But, the category is growing, with 19.2% value growth in 2022.⁵

One of the challenges Purdey's faces in this growing category is increased competition. The proliferation of the wellness sector has seen several smaller brands taking share of market - all with a range of different functional claims. Minerals, dietary fibres, probiotics, adaptogens, CBD, THC are all now being offered to consumers. The category can therefore often be confusing and hard to navigate. In addition, smaller brands are also taking share of space on shelf. Purdey's needed to address these two pressures by making themselves simple and easy to buy, as well as growing share of shelf.

Within functional wellness, Purdey's is one of the larger brands, which presents a secondary problem. To increase growth, they would need to grow the category. That meant

that the new packaging would need to widen appeal and become more accessible for consumers. Driving taste appeal and maintaining focus on key natural benefits would be crucial to that.

Moreover, Purdey's had the added pressure of such a high reliance on on-the-go consumption and single serve. The whole of the impulse market was hit particularly hard and functional wellness fared no better with a -31% value decline.⁶ Competitors who played in the deferred category and had more presence in mults fared better. This can be measured through the data, as the total functional wellness (impulse and deferred) only declined -10% in value sales. Purdey's declined faster (-19%) than the overall category during covid because of their impulse-heavy presence and, with less distribution post covid, would need to work doubly hard to grow.⁷

Key Facts:

- Launch date: May 2021
- Packaging design across 3 x SKUs: £70,000.00

⁴ Convenience Store, 11.05.2021

⁵ Nielsen IQ 52 weeks 24.09.2022

⁶ NielsenIQ 52 weeks 26.09.2020

⁷ Ibid

CONTEXT AND OVERVIEW

Solution

The Purdey's brand design needed to both stand out on-shelf and be simple enough for shoppers to understand the key messages of the brand, that it's natural, delivers delicious taste and offers a gentle, energising lift. Achieving all of these things would help the brand reach a wider audience, increasing penetration and subsequently grow. Additionally, we needed to develop a more flexible design structure to allow for new variants to help reach different energy need states and grow share of shelf.

Firstly, we added a prism icon to the pack design, helping consumers recognise the brand quickly on a crowded shelf. This both stood out from competitors, whilst remaining simple. It also worked to drive better understanding of the core proposition, helping consumers understand the natural energy benefits of the products. Alongside this, we further enforced the benefits by locking

up the 'natural energy' descriptor with the brand name, as opposed to with the variant benefit.

Creating quick brand recognition was key for the brand, so we also drove greater consistency. Owing the metallic background across the entire brand was key, as was maintaining a consistent illustration style.

To help Purdey's become more accessible and drive taste appeal, we overlaid the silver coating with splashes of colour, injecting a sense of liveliness to the overall design. On the 'softer side', the gradient style brought a gentle lift of energy.

Illustrations were utilised to outline the specific benefits of each flavour variant – coupled with the colour splashes, this allowed us to differentiate the ranges, with different colours for different flavours.



RESULTS

Summary

Overall, the brand has seen exponential growth post-rebrand, helping counter the losses sustained during Covid.

The new design supported in both standing out on-shelf, being easier to understand and becoming a more accessible brand. The role of design can be pinpointed in a number of ways. The research on the new design shows how much more effective the new design is compared to the old design. Due to the impact of covid, results for the brand are best measured against its performance pre-covid, in 2019. In 2022, the brand value spend per point of distribution has increased vs 2019.⁸ And in 2022, the brand's penetration grew nearly 200% from its 2019 levels.⁹ All this was done against a backdrop of distribution losses and a reduction in media spend between 2019 and 2022.

1. Increase value sales:

Post-redesign, Purdey's has seen a 12.6% YOY growth, to reach a total size of £13.3M. Compared to the functional wellness category as a whole (pre-rebrand, Purdey's performed worse than the category), in the last 12 weeks Purdey's are up 6pp in volume share and 0.5pp in value share outperforming the category.

In value sales per point of distribution, there was an increased demand YOY of 7.9%. Looking specifically within the impulse category, this was even higher, with a post-rebrand uplift of +16%.

Looking at the impact of the redesign outside the effects of Covid, we can see that the brands value spend per point of distribution, an equivalent measure to rate of sale, increased from £1,500 in 2019, to £2,100 in 2022.

2. Increase market penetration:

The brand's penetration grew from 1.7% in Oct 21 to 3.2% in Oct 22, a +83% YOY growth¹⁰ which is a stand-out performance for the brand. However, going back even further, brand penetration grew nearly 200% from 1.1% in 2019 to 3.2% in 2022.¹¹

3. Increase distribution:

The brand is starting to see some distribution gains, with +20% in the L12wks. This is due to additional flavours (something the redesign helped to enable) and formats (cans).¹²

4. Additional results:

With quantitative consumer research, we can further emphasise and support the positive impact of the Purdey's redesign.

Having carried out consumer research pre- and post-rebrand, we found that "the new design better communicated almost all desired messages". The only message that remained equal was 'energising'.

The new branding also helped improve identification, with time it took for shoppers to find Purdey's on shelf falling from 6.2 seconds to 4.8 seconds – this is faster than the main competitors within the functional wellness market, Tenzing, who take 6.5 seconds to be identified.¹³

⁸ Purdey's

⁹ Kantar Worldpanel 02.10.2022, 52weeks

¹⁰ Kantar Worldpanel 02.10.2022, 52weeks

¹¹ Kantar World panel 01.11.2022, 52 weeks

¹² NielsenIQ Scantrack 12 weeks to 24.09.2022

¹³ The Big Picture Research



RESULTS

Potential factors outside of design which may have meant success for Purdey's

Did distribution losses effect the success of the re-design?

Purdey's suffered considerable distribution losses as the new rebrand was launching. In 2019, the brand's overall distribution coverage was 9,228, compared to 2022, where it dropped to 6,360 points. (A number that accounts for both the number of items sold (depth) as well as the weighted number of stores selling those items (breadth)).¹⁴

Not only did this effect the brand's overall growth numbers, but also its reach and penetration. This means that rather than considering overall growth numbers as key indicators of the re-design success, value spend per point of distribution is a more accurate reflection of impact.

Did Purdey's media spend effect the success of the re-design?

In 2022, Purdey's ran a media campaign costing £410,000 – this was significantly lower to a campaign they ran in 2019, costing £1.6 million.

The fact that the brand was able to drive penetration gains and value spend per point of distribution, even with the lower media spend, points to the role that packaging had in driving choice at point of purchase.

¹⁴ Nielson IQ 52 weeks 02.04.2021

