



RETAIL RANGE REDESIGN

INDUSTRY SECTOR:
3577 FOOD PRODUCTS

CLIENT COMPANY:
PIZZAEXPRESS

DESIGN CONSULTANCY:
BULLETPROOF

DATE:
JUNE 2017

FOR PUBLICATION

“We had a clear ambition – to create packaging for the PizzaExpress ‘At Home’ range that delivers the same brand attitude and values as our ‘In Restaurant’ experience.

We wanted to challenge the category, be innovative and deliver real standout at shelf to win with the shopper.

Bulletproof tackled this with an invigorating blend of challenge, creativity, commercial awareness and pragmatism and we are pleased with the performance to date.”

Matt Ward, commercial director at PizzaExpress



Executive Summary

PizzaExpress is an iconic brand, loved by many for its dining experience and great tasting pizza that never disappoints.

However despite its large consumer base of over 10 million (7 million in restaurants and 3 million in retail), only 15% of PizzaExpress consumers shop the brand across both restaurant and retail channels. Recognising the significant opportunity to start behaving like a single brand to grow consumption across both channels, PizzaExpress appointed Bulletproof to rethink the packaging design across the 'At Home' retail range.

Bulletproof jumped into action, delivering a visual and verbal packaging identity for the PizzaExpress retail offering that communicates a single restaurant brand proposition, reflects the brand positioning of 'Sharing true passions since 1965' and leverages the distinct brand personality and heritage to get more people eating PizzaExpress products at home.

And it's worked:

More pizza, pronto!

The relaunch delivered **15% value** and **17% volume growth** in the crucial 12 weeks post relaunch across the PizzaExpress pizza range.

That's **£2.79 million additional revenue** versus the 12 weeks prior to relaunch. And a whopping **1.15m more pizzas sold!**

17%
Volume Sales
GROWTH

15%
Value Sales
GROWTH

£2.79
MILLION
additional
REVENUE

1.15million
MORE
PIZZAS Sold



Executive Summary Cont.

More shoppers, more often!

The best news is that these sales increases have been driven by new pizza shoppers. Thanks to this, their **penetration is now 9.5%** which is an **increase of 12.6%** following the relaunch.

The volume of PizzaExpress pizza bought by each shopper has increased too, by **1.7% per buyer**, while **frequency of purchase has seen a 2% increase**.

Crucially, the relaunch of chilled pizzas led to an **increase in sales and recruitment of new, younger shoppers** into the PizzaExpress range across all retailers, verifying that the relaunch has played a significant role in making the brand more relevant to the next generation of consumers.

Keeping it PizzaExpress

The big ambition behind the design strategy was to increase cross purchase of products from within the brand portfolio – and between restaurant and retail.

Packaging design has been an important factor of the relaunch in helping to encourage **634,020 more PizzaExpress shoppers per year to stay within the brand portfolio** when choosing a side of breads, compared to prior to the relaunch.

That's a huge **394% increase in cross purchase**. Even better when you consider that this increase has largely been driven by an increase in listings for the full PizzaExpress range, enabled due to the relaunch.

That means across retail and restaurants, a whopping 21% of UK population now buys PizzaExpress!



Project Overview

Description

PizzaExpress has been obsessed with pizza ever since its founder Peter Boizot opened the first restaurant on Wardour Street in London's Soho in 1965. Boizot partnered with visionary designer Enzo Apicella to found the brand, and their mutual passion for food and art formed the bedrock of the PizzaExpress vision ever since.

Times have changed since Wardour Street first opened. There are now more than 460 PizzaExpress restaurants in the UK and abroad, and many more customers are enjoying PizzaExpress 'At Home' thanks to the brand's popular retail range.

However, although the passion for pizza and design remained the same, it was becoming increasingly inconsistent as the brand grew across restaurant and retail. And over time, the loss of artisanal detailing from the retail packaging had eroded the distinctive on-premise brand personality.

Overview of Market

Within the pizza market, comprising of chilled and frozen offerings, PizzaExpress belongs to the chilled category. At the time of the brief to Bulletproof, growth in the chilled take home pizza category had slowed to 2% against 4.2% the 52 weeks prior.

One thing was consistent across chilled and frozen, however, own label was helping itself to a much bigger slice of sales at the expense of brands. This pattern was particularly pronounced in chilled pizza, where own label commanded 87.5% of the market (up from 87% the year prior). Sales of own-label chilled pizza surged by £29.4m in the last year. Meanwhile, brands were up just £1.6m.

But much of this growth came from innovation from private label; the renovation of the Co-op range, and Marks & Spencer's top tier chilled pizza range has driven the market in the premium segment, thanks to innovation with the use of superfoods in toppings such as kale, beetroot, broccoli etc, as well as spelt and rye sourdough in the base. This type of innovation is driving trial and growth, with more shoppers trading up to the own-label premium tier.

Additionally, in a market that has always seen a significant price promotion element, the urge to develop a brand that attracts consumers without discount is highly sought after, and consequently lack of stand out was hitting premium players in the market, including PizzaExpress, particularly hard.

Before



Shelf Line-Up



Project Overview Cont.

Outline of Project Brief

Following their strategic reappraisal of the PizzaExpress master brand identity Bulletproof was tasked with the redesign of the 'At Home' range as part of a 'One Brand' strategy, aimed to attract more of its restaurant customers to the retail range, while driving reappraisal from both new and existing consumers.

Specifically, the brief was to redesign the brand packaging to:

- ✓ Deliver a single consistent brand identity for the retail brand offering (one of four sales channels in which the PizzaExpress brand is sold) to attract more restaurant customers to the retail range.
- ✓ Boldly bring to life the passion, flair and taste experience of the restaurant to ensure a consistent brand experience 'at home' while clearly communicating the unique and ownable PizzaExpress brand language on pack.
- ✓ Entice new customers to the retail range through stronger visibility on shelf.
- ✓ Deliver brand enhancing premium retail packaging to help justify the higher price point and encourage more consumers to buy off promotion.
- ✓ Ensure a consistent brand visual identity across the multiple retail categories including pizza, bread, pasta and dressings.
- ✓ Create a tiered design system to cover classic and premium ranges within pizza while futureproofing the range to allow for future NPD ranges and brand expansion.
- ✓ Deliver a clear and ownable approach to flavour navigation at a range level.

Project Launch Date:

May 2016

Design Budget:

£90,000

Production Budget

£10,000

After



655 words

Outline of Design Solution

PizzaExpress is an iconic brand, loved by many for its dining experience and great tasting pizza that never disappoints. It's brand positioning 'Sharing true passions since 1965' reflects its strong heritage and the exuberance and spirit of the brand.

Bulletproof were keen to create a solid master brand proposition for the retail packs that would reflect the current brand positioning, while also leveraging the warmth, passion and artisanal detailing of the PizzaExpress restaurant brand.

The agency wanted to approach the redesign from a completely fresh and revolutionary angle and make the most of the iconic assets that PizzaExpress had. The team decided to take the PizzaExpress branding and use it in an unapologetic, heroic way. The introduction of bold, handwritten typography adds authenticity, and serves to achieve clear navigation across the range. In the bustling pizza category, one of Bulletproof's biggest challenges as to clearly differentiate between the standard (Classic) and premium (Romana) tiers.

Bulletproof chose to do this by using a black palette for the Romana range, bringing through product colour within the typography to clearly communicate the variant. The use of silver foil on the branding as well as matt and gloss varnishing helps to premiumise the packs. For the Classic pizza range, the background colour flexes to reflect each flavour variant creating a sea of colour in the chilled pizza fixture. This bold use of colour also features across the pasta, bread and dressings categories with the dressings further punched out on shelf using a cap and sleeve with the PizzaExpress branding and stripes.

Shunning category norms, Bulletproof significantly reduced the product window on the pizza packaging instead relying on beautiful ingredient photography showcasing that the pizzas within contain the same fresh and delicious ingredients that you're likely to find in the PizzaExpress restaurants.

"To work on a brand with such rich heritage as PizzaExpress was a joy for all involved. Our design solution centres around the PizzaExpress flavour creation, delivering a bold and unified portfolio that is filled with all the authenticity and passion of the brand, while also capturing the imagination and taste buds of the consumer."

Nick Rees,
global creative director at Bulletproof



**£2.79
million
ADDITIONAL
revenue**

**+12.6%
penetration
GAIN**

**OUT PERFORMING
THE MARKET by
9.3%**

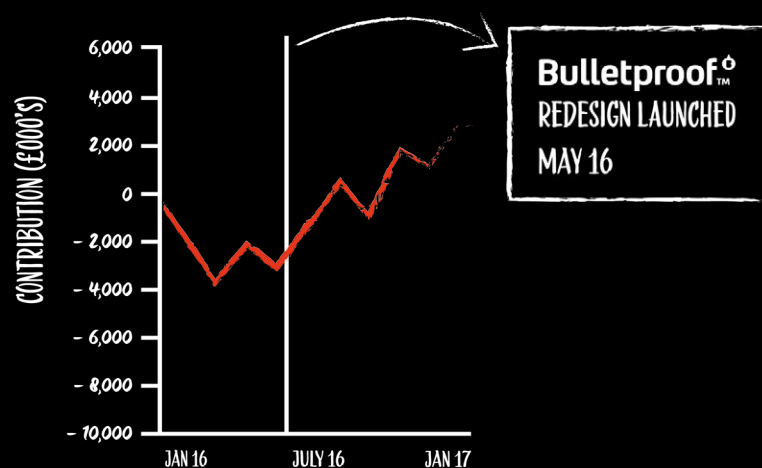
**£10.85m
ADDITIONAL
retail sales
VALUE**

Summary of Results

Increase in Sales

The relaunch delivered **15% value and 17% volume growth** in the crucial 12 weeks post relaunch across the PizzaExpress pizza range. That's **£2.79 million additional revenue** versus the 12 weeks prior to relaunch. And a whopping **1.15m more pizzas sold**. Requiring **over 345,000kg more dough** than prior to relaunch. And **691,200 more portions** of PizzaExpress deliciousness served, thanks to the new look!

And further growth has come in later in the wake of the relaunch... in the 26 weeks post relaunch PizzaExpress has seen further, significant growth.



The breads in the brand's portfolio also enjoyed the fruits of a successful relaunch delivering an **increased 5.6% value and 3.2% volume growth** 10 weeks post launch.

Attracting More Shoppers, More Often

- ✓ The best news is that these sales increases have been **driven by new pizza shoppers**.
- ✓ The brand has enjoyed a **+12.6% penetration gain** following the relaunch.
- ✓ The volume of PizzaExpress pizza bought by each shopper has increased by **1.7% per buyer**. And frequency of purchase has seen a **2% increase** too.

Increase in Rate of Sale

Overall, rate of sale of breads increased by **15% in volume and 4.5% in value** post relaunch. And in some retailers, **PizzaExpress is outperforming the rest of the market by 9.3%**! The relaunch delivered **15% value and 17% volume growth** in the crucial 12 weeks post relaunch across the PizzaExpress pizza range.

Business Growth

The project itself was integral to the achievement of an ambitious target to grow the brand by £50m over 5 years.

The relaunch has proved to be instrumental in allowing PizzaExpress to grow sales by 20% against the £150m retail sales value 5-year ambition. That's a **total of £10.85m additional retail sales value** added since the time of brief to date.

Summary of Results Cont.

Changes in Consumer Behaviour

Most growth across the past year has been driven by increased penetration, demonstrating that the overall PizzaExpress customer base is in growth following the relaunch.

The relaunch of chilled pizzas led to an increase in sales and recruitment of **new, younger shoppers into the PizzaExpress range across all retailers**, verifying that the redesign has played a significant role in making the brand more relevant to the next generation of consumers.

Furthermore, PizzaExpress pizza shoppers gained in Tesco are **more likely to be young or older adults than the brand's existing shoppers**, showing that the design has allowed the brand to appeal to a much wider range of customers.

This success has been attributed to the **easier range navigation** enabled by the redesign.

Not to mention the impactful design of the premium Romana range, which has allowed PizzaExpress to sell into Tesco, **accessing a huge new customer base, previously off limits.**

Keeping it PizzaExpress - Encouraging Cross Purchase

A big ambition behind the design strategy was to **increase cross purchase of products from within the brand portfolio** - previously too many people were choosing a PizzaExpress pizza, but opting for private label when it came to sides, such as breads.

Packaging design has been an important factor of the relaunch, along with a joined-up promotions and marketing approach between retail / restaurant, in helping to encourage **634,020 more PizzaExpress shoppers** per year to stay within the brand portfolio when choosing a side of breads, compared to prior to the relaunch.

That's a huge **394% increase in cross purchase** - and a huge tick on the goal list for the relaunch.

That result is even better when you consider that this increase has largely been driven by an **increase in listings for the full PizzaExpress range**, enabled due to the relaunch.

This cross purchase is not exclusively in retail either - to date **15% of PizzaExpress consumers buy the brand in both restaurant and retail channels.**

That's **239,000 more brand-loyal consumers** post relaunch, versus the time of the relaunch brief.

Between channels, retail is attracting new consumers at the fastest rate, **out pacing restaurants by 3%.**

Percentages are hard to benchmark. So perhaps instead, consider that across retail and restaurants, **21% of UK population now buys PizzaExpress**, an **increase of 4%** versus the time of the retail range relaunch brief.



Summary of Results Cont.

Increase in Market Distribution

PizzaExpress **increased its value share by 0.7 pts** through value growth and distribution growth in Tesco and Waitrose (April-January YOY). In Tesco, where the range is exposed to the greatest number of shoppers, after the relaunch the following period saw a strong uplift in promo sales. This was despite reduced distribution from approximately 1,500 stores to just under 1,000.

Range Expansion, at Lightning Speed!

But the most impressive contributor to distribution in the eyes of the PizzaExpress marketing team is the logical design system set up by Bulletproof, which has allowed the speedy roll out of NPD into new distribution channels in a way previously inaccessible to the brand.

This has allowed PizzaExpress to take advantage of opportunities to access new occasions, consumers, and retailers, **contributing a whopping £5.2m incremental growth** to the brand so far, with many more exciting new products and opportunities in the pipeline.

"We wouldn't have been able to seize the opportunities presented to us with such pace without the design system set up by Bulletproof, which hits the brief of a logical packaging design portfolio, that can be easily grown."

Richard Mills,
senior manager of retail at PizzaExpress

Increase in Price Point

In the 12 weeks after the relaunch PizzaExpress saw **growth in off-deal sales** across the market, demonstrating that the relaunch has helped to subdue the commonplace price promotions that brands are highly susceptible to in this category.



Rapid launch of NPD



Artisana frozen proposition
from concept to shelf in

12 Weeks

Iceland

1 new retailer

added to the PizzaExpress
stable thanks to NPD



The gateway to allow the brand to

**access the £530m
free-from market**



Leggera healthier range

Waitrose

Listing in Waitrose



A seasonal special programme,
aligned with the restaurant experience

Summary of Results Cont.

Sales Team Testimonials

Who better than the PizzaExpress sales team to pass judgement on the relaunch? As the frontline of brand sales into retail accounts, the team confirm that the relaunch has had a positive impact on relationships with their buyers:

"The professional look of the new packaging design was well recieved by all the retailers we work with. The Bulletproof redesign was welcomed by buyers on all accounts, with good feedback."

Niall Quinlan,
commerical manager at Bakkavor Pizza

Changes in Consumer Attitudes & Behaviour

Perhaps integral to all the other results shared here, is the shift in brand visibility and customer perceptions of PizzaExpress.

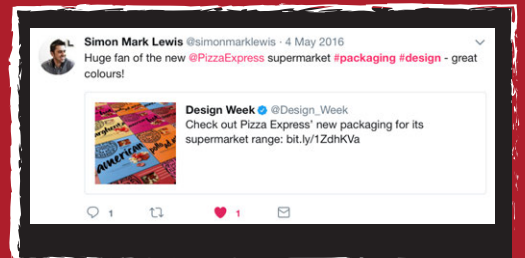
Four in five shoppers found the new packaging design to be fresh, tasty, modern & high quality.

Shoppers said that the new look offered greater clarity and standout increased likelihood to buy the new design.

"The lack of colour contrast on the old design made it difficult to read – THIS IS SO MUCH BETTER. It is less cluttered, EASY TO READ and easy to see the ingredients."

"It looks much CLEARER and much EASIER to READ about the contents."

Social Media Response



*"LOOKS MORE professional
premium
AND eye-catching."*

*"THE NEW PACKAGING
IS BRIGHTER, more
APPEALING,
more MODERN LOOKING
THEREFORE more INVITING."*

Summary of Results Cont.

Excellent Execution

The relaunch project was no mean feat.

The exercise saw:

- ✓ 3 different companies working together
 - ✓ to address 4 categories at the same time
 - ✓ with 4 different manufacturers delivering the final product
- ...all at the same time.

"The success of the relaunch is entirely down to the strength of the cross functional working relationships. From us, the client team, through to the insight teams we worked alongside, ending at the manufacturers – Bulletproof proved to be the partner we needed to deliver this complex and ambitious project that required more than just creativity, but also a harmonious attitude towards collaboration."

Richard Mills, senior manager of retail at PizzaExpress

Other influencing factors

Although PizzaExpress operates in a heavily price promoted category, the promotional schedule in the 12 weeks post launch was broadly comparable to the same period prior to launch.



Research Resources

- IRI 52 w/e 8 November 2015
- BV insight w/e 26th February 2017
- Kantar WPO, 24 w/e post relaunch
- Kantar WPO 52 w/e 29th Jan vs prior year
- Dunnhumby data
- Talking Food panel
- BV insight Jan 17 data: 10 weeks pre and post relaunch
- BV insight Jan 17 data: April-January Year on Year
- Kantar WPO, January 2017 data
- The Grocer Focus on Pizza Category Report 18th Feb 2017

Industry Recognition and Accolades



Winning Best in Show & Gold in the PAC International Leadership Awards - Brand Marketing Category



Making the front page of leading UK packaging industry magazine



Number 4 MOST
NOTABLE
project OF
2017