



THE KITCHENEERS

DBA Design Effectiveness Awards Entry
November 2023

FOR PUBLICATION

The Kitcheneers

Client: AiP Schools (UK&I)
Agency: Without Studio



WITHOUT

EXECUTIVE SUMMARY

School food is a sector in crisis. Participation by students in school canteens has been on a long-term downward trend, even when the food is free: between 2014 and 2020 uptake of free school meals in secondary schools had fallen by 5.7%. Meanwhile, caterers are trapped by a government cap on the prices they can charge and inflation-driven increases in cost – caterers in the UK saw a 50% increase in the cost of ingredients in 2022, whilst the funding and price cap per meal has only increased 3%. This has left caterers struggling to provide nutrition to a minimum standard set by legislation. In May 2023 LACA, the industry trade body, said: “Members are now stating there is very little room for manoeuvre, with many caterers facing a precipice”.

AiP is a school caterer based in the Midlands, servicing [redacted confidential data] secondary schools across the Midlands, Bristol and London,

through a brand called “Feed Me”. Despite a passionate local team, a high quality operation and strong relationships with local schools, the company was struggling to differentiate from competitors and win new business. With multiple school contracts coming up for renewal, and anecdotal indications that at least [redacted confidential data] client schools planned to switch suppliers, they knew something had to change. Their existing school food offer was failing to entice schools or pupils.

In a market where pricing is effectively standardised, AiP approached us to create a revised brand that would differentiate, secure contracts, encourage student uptake, and revitalise their team.

Our solution was The Kitcheneers.

Within 15 months of launching, this new brand has delivered:

Retained clients - The new brand was sold into [redacted confidential data] pilot sites, renewing contracts with existing clients, including [redacted confidential data] that were most at risk.

Exceptional new business growth - An increase of

+1,200% YoY,

with [redacted confidential data] new contracts won in FY23.

Average contract value increase

+286% YoY,

with an average contract value of [redacted confidential data] in FY23.

Student participation uplift - Average revenue growth of

10.8%, with one school seeing

growth of 21.3%.

While improving nutrition across dishes - All this, with a menu that contains

35% more vegetable servings than the previous brand.

This is how The Kitcheneers is solving the intractable problem of how to feed our kids at school...



PROJECT OVERVIEW

THE BRIEF

“Develop a compelling food offer that is commercially sound, complies with food regulations and reduces operational complexity. The offer needs to be best in class and appeal to new and existing clients (B2B) and the pupils (B2C) we serve daily.” - Client Brief

AiP wanted a root and branch review of their brand proposition. Not just a redesign of the identity, but a fundamental and innovative reimagining of the brand - from its mission and values, to how it guides behaviour, what it means for the product they sell, how it looks, what they say, and how it's experienced by the end customer.

“We want to be able to say our offer is completely different to our competitors.” – James Mundy, Marketing Director

TARGETS & GOALS

FOR SCHOOLS

- Retain [redacted confidential data] “at risk” contracts by selling them the new concept
- Deploy concept across [redacted confidential data] pilot sites
- Triple new contract wins from previous year (from [redacted confidential data] to [redacted confidential data])
- Increase average new contract value from [redacted confidential data], to surpass [redacted confidential data]

FOR STUDENTS

- Increase overall student participation to grow sales in sites by 5%
- Increase free school meal participation by 5% in line with sales growth
- Increase vegetable intake by at least 20% without alienating fussy eaters

KEY FACTS

Launch date: Pilot sites launched in June 2022

Period considered: 15 months, June 2022- Sept 2023

Project scope: Brand strategy, product strategy, naming, identity design, copy writing and messaging, the customer experience (service style, uniforms, interiors, packaging, signage, point of sale); marketing comms and corporate sales tools.

Design fees: [redacted confidential data]



OVERVIEW OF THE MARKET

“We are facing a very fierce competitive landscape, with numerous and fragmented competitors, squeezed margins and slow growth. The market is polarised into big (global, listed) like [redacted confidential data] and [redacted confidential data], and little (local, disruptors) competitors, with a high degree of consolidation adding to volatility. Add the cost of living crisis and cost inflation, and we are facing ever increasing competitive pressure.” - Client Brief



The knotty challenge of feeding our children well at school has occupied the great and the good, from Jamie Oliver and his Jamie’s School Dinners campaign, to Henry Dimbleby and John Vincent’s comprehensive assessment in their School Food Plan. With good reason: an American study showed test results improved by an average 4% when healthy school food was provided, and a whopping 40% improvement for kids on free school meals (1). Nutritional poverty has a definitive impact on opportunity and prospects.

But despite their best efforts, the sector remains challenged, with regular headlines triggering outrage at the state of school food. The most high profile example was prompted by a photo of a weekly free school meals parcel containing a loaf of bread, a can of beans, two bananas and assorted root vegetables. While the caterer in question was roundly condemned, it is a symptom of wider, intractable, structural problems faced by all school caterers.

“No profit at all on school meals now, it’s not sustainable.” – The Guardian, May 2023



A LACK OF PRICING POWER

A student meal in a state school is a product paid for by the student. But the price of meals is effectively capped by the level of funding the government provides for free school meals. For students eligible for this funding, the allowance is £2.53 per meal. School caterers therefore have to provide menus that serve complete meals at this price. This cap removes pricing power on two fronts - with schools and with students. For companies trying to increase revenues and profitability in schools, price rises for students are not an option. And when it comes to pitching for school contracts, the lack of pricing power results in all bids from caterers coming in at a similar financial level.

“We are all tied to the price cap - it can’t be about price, we need something else to differentiate us.” – AiP Sales Team Workshop

FALLING DEMAND

Meanwhile, attempts to increase sales through more student participation are hampered by the cost of living crisis. This has squeezed the budgets of many families, reducing the amount students can, or are willing to, spend. A survey by the Together Through This Crisis initiative, found that 40% of households end the month with no money left, while 24% run out of money for essentials most months. (2) And even when cost is not an issue, student demand is lagging. Between 2014 and 2020, uptake of free school meals in secondary schools fell, from 76.6% of pupils registered for free meals taking a free meal in 2014, to 70.9% in 2020. (3)

“AiP’s social mission is to help children and young people fulfil their potential. We can only do this if the kids choose to come to us.” – AiP Operations Team Workshop

QUALITY REDUCED BY COST INFLATION

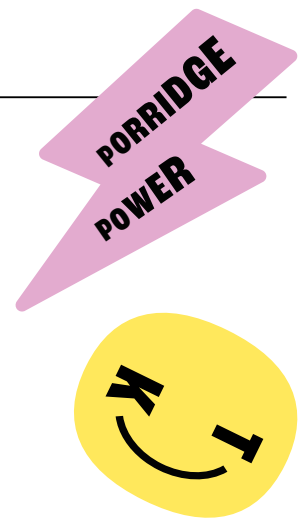
The cap in prices and downward trend in demand is compounded by a rise in costs. Between November 2022 and May 2023, caterers in the UK saw a 20% increase in the cost of food, on top of additional increases in 2022 of over 50% (4). Delivering a quality product in this environment - one that is attractive, enticing and nutritionally sound - is a challenge. Increasingly, caterers have resorted to an increased reliance on outsourced food preparation, ultra-processed and cold foods (5), with 77% of school meal providers having had to change their menus and 25% cut back on choice due to supply issues. (6) In all, LACA, the school caterers trade body, estimates that some 1.8m children face poorer quality school meals as a result of the rising cost of ingredients.

“The only way we can grow is to increase sales through greater participation. There is no wriggle room in the margins.” – AiP Sales Team Workshop

THE PERFECT STORM

Fixed prices, rising costs, and weak demand combine in a vicious cycle of cost cutting, leading to less appetising meals, resulting in greater wastage, less profit, less investment and poorer nutritional outcomes for kids. This is why we’re still seeing headlines like “Student shames school for disgusting dinner that’s ‘crime against humanity’” and “Parents’ fury at ‘inedible’ school dinners”(7). When faced with this in the school canteen, it’s no wonder kids are “choosing Greggs or the Tesco meal deal over the school meal”. (8)

With such significant, complex market headwinds, AiP faced a challenging path to growth. But the goal was clear: feed more students. Increasing the number of meals served, through new school contracts and greater student participation, was the only way to increase revenue and to fulfil their social mission.



Citations and Sources:

(1) School Lunch Quality and Academic Performance, National Bureau of Economic Research 2017
(2) Report by the Together Through This Crisis initiative, whose members are Save the Children Shelter, Turn2us, Little Village and 38 Degrees, 2023

(3) “Uptake of free school meals in secondary schools is falling. In 2014 76.6% of pupils registered for free meals took a free meal, but that proportion had fallen to 70.9% in 2020” TES Feb 2022
(4) Survey by LACA – the School Food People, which represents caterers in England and Wales, 2023
(5) ‘Pizza every day – why?’: Secondary school food provision survey, British Nutrition Foundation, 2021.

(6) Survey by LACA – the School Food People, which represents caterers in England and Wales, 2023.
(7) The Daily Mail, March 2022. The Mirror Apr 2023.
(8) Interview with Chef Manager at [redacted confidential data] Schools, pupils and their characteristics. Office of National statistics

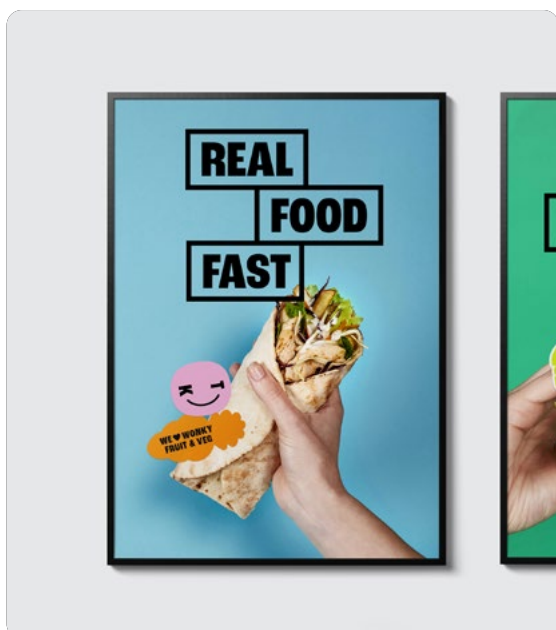
PROJECT OVERVIEW

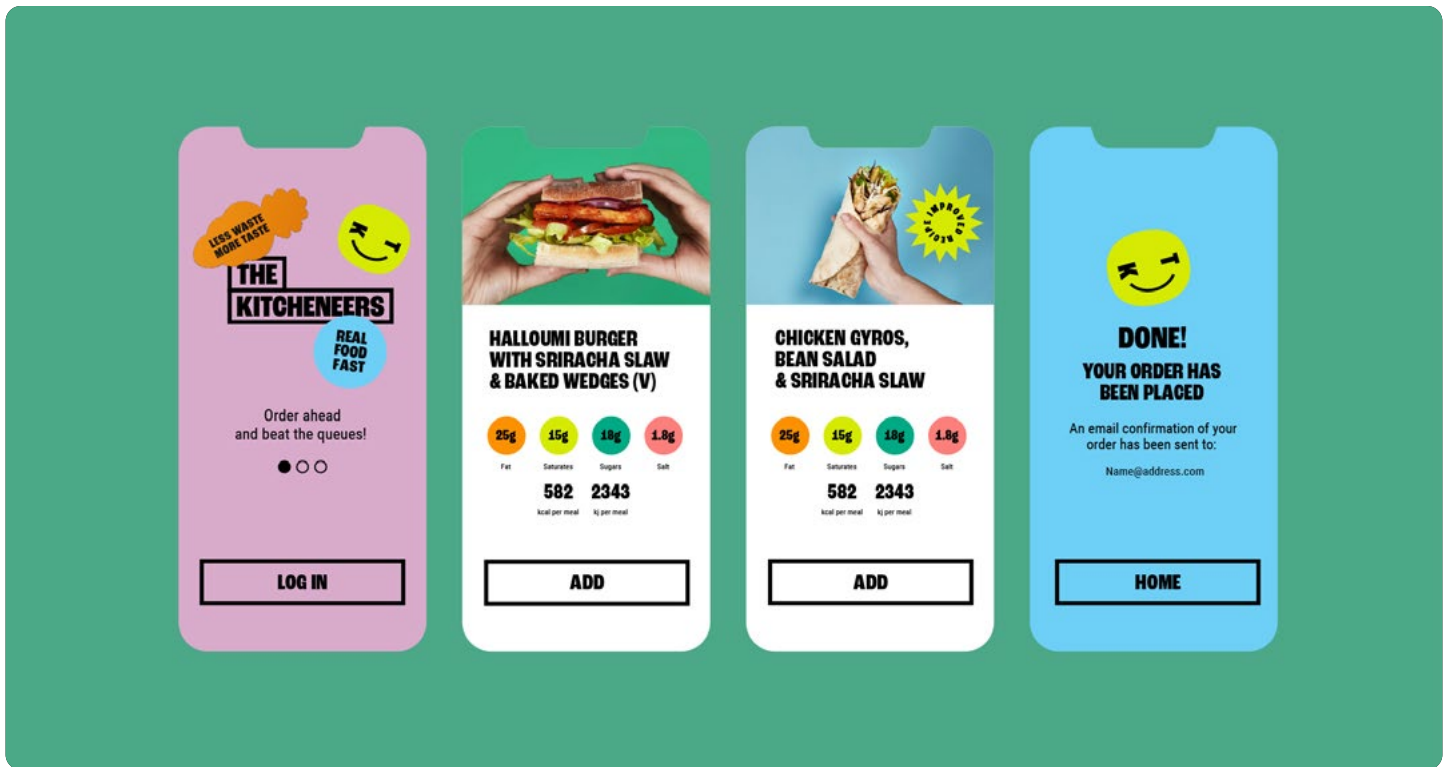
DESCRIPTION

Our research, amongst students, parents, consultants, school business managers, and head teachers, uncovered a broken language around food between adults and young people. Price pressure restricts menu innovation. Students, used to the flexibility of the high street offer, are suspicious of the hidden ingredients and inflexibility of common school one-pot dishes like stews and curries. Adults see children as resistant to anything that isn't pizza and chips. Marketing

posters with stock imagery of kids picking blueberries and leafy greens mask the reality that children's choice is typically deep-fried and beige.

AiP recognised the need for a root and branch review of their brand proposition, not just a redesign of the identity – from mission and values, what it meant for the product, its name, how it looked, what it says and how it was experienced by students in schools.





A MENU FOR TODAY'S STUDENTS

Researching and workshoping with students at AiP kitchens showed that many were suspicious of 'hidden ingredients' in common one-pot dishes like curries and stews. This reduced trust and willingness to experiment, and increased food waste. Instead, we proposed a simple, 'brilliant basics' approach: good quality proteins, supplemented with customisable sides that allowed students to personalise dishes according to taste, allergies or belief.

For example, crispy tray baked chicken, customised with Thai curry, PeriPeri, or gravy

and all the trimmings. Or a perfect tomato sauce, which can be added to grilled fish, stirred into roasted vegetables, or served with pasta.

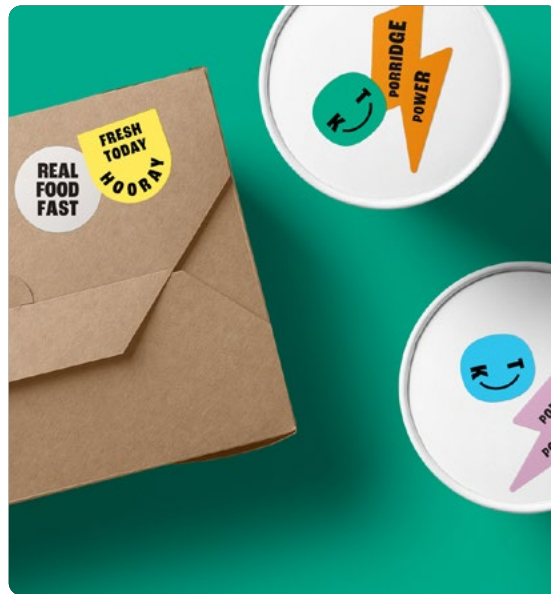
This 'modular' approach became the brand's philosophy, inspiring everything from the name, to visual identity and tone of voice. The Kitcheneers is about collaboration, choice and experimentation – between pupils, teachers, parents, chefs and suppliers – leading to food that's easy, nutritious, customisable and relevant.

ACROSS THE BRAND EXPERIENCE

We designed a scalable brand asset kit that could quickly and easily transform a space. Brand signage incorporated school names to feel ownable and unique to each site, and be something for the children and adults alike to feel proud of.

Menu, packaging, poster and tent cards were developed as messaging systems whilst maintaining simplicity and personality and encouraging children to try something different.

With many schools struggling for space due to increased student numbers, we developed pop-up concepts that could use old shipping containers or horse boxes to offer another point of sale, secondary to the main canteen. The overhaul of the school canteen needed to be eye-catching and attention-grabbing to drive participation rates.



DESIGNED FOR GEN Z / ALPHA ATTITUDES

The visual identity was also influenced by research showing that today's students are motivated by high street brands that make life simple; who take their mission seriously, but not themselves. In response, The Kitcheneers took a confident but approachable tone that brings authority and energy into typically generic dining halls.

Once-empty walls now feature posters with new messaging that is led by student interests, like the environment and ethical ingredients, in a contemporary and relatable way. Likewise, the typography was chosen to be hard-to-ignore and easy-to-digest, helping students make decisions ahead of time and reducing queues and congestion.

Food photography was inspired by the students' favourite high street brands, alongside stickers and sustainable packaging for meals on-the-go.

RESULTS

EXISTING CLIENTS RETAINED

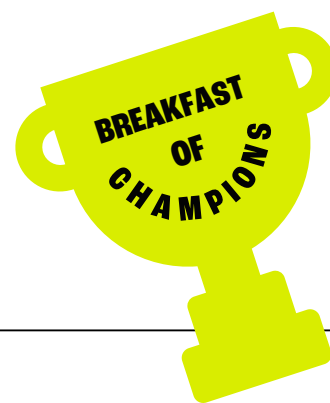
On launch, the new brand was sold into [redacted confidential data] pilot sites, renewing contracts with existing clients, including the [redacted confidential data] that were most at risk.

Within the first six months, revenue reached [redacted confidential data] across the [redacted confidential data] pilot sites. Over the full academic year, the two best performing sites saw sales uplifts of 21.3% for [redacted confidential data], and 19.22% for [redacted confidential data].

In a 2023 internal staff survey conducted by AiP, 71% of respondents identified “Client retention - existing schools are happier with the offer and more likely to stay with us” as the outcome that the new brand had the greatest impact on.

In less than 2 years from launch, The Kitcheneers has already been sold into [redacted confidential data] of a total of [redacted confidential data] existing clients. The ambition is now to reach 100% sell through by the end of the 2023/2024 school year.

“We would have struggled to retain [redacted confidential data] and [redacted confidential data] without a new offer like The Kitcheneers.” –
Laura Brimacombe, Business Development Director



NEW AND BIGGER CONTRACTS WON

The Kitcheneers was responsible for a growth of 1,200% in new business wins since the rebrand (compared to the objective of tripling contract wins). The new brand supported the sales team in attracting interest and standing out amongst competitors like [redacted confidential data], with [redacted confidential data] new contracts won in FY23 compared to just [redacted confidential data] in both FY21 and FY22.

Not only is the brand winning new contracts, it's winning bigger contracts. The Kitcheneers has proven a success with large, multiple-academy trusts who govern multiple schools, resulting in the average contract value increasing by +286%, from [redacted confidential data] in FY21 to [redacted confidential data] in FY23. This represents new contract values of [redacted confidential data] in 2023 alone, a huge success for the business considering just a year prior, they had only won [redacted confidential data] new contract at a value of just [redacted confidential data].

With these new contract wins, The Kitcheneers will reach over [redacted confidential data] new students, providing them with healthier, tastier and more nutritious meals.

“As the head of food for Corporate Services, tasked with building and growing our presence in food-only contracts it was vitally important that we could deliver against the current market expectations and convince clients that we had the best solution even though we had been out of the spotlight for many years. We are growing in food-only and being invited to tender in places we would never have been 5 years ago.” – Laura Brimacombe, Business Development Director

STUDENTS WON OVER - RESULTING IN INCREASED PARTICIPATION & SALES

In the [redacted confidential data] pilot sites which have been fully activated in the 22/23 academic year, sales increased by an average of 10.8% compared to the previous year. The best performing sites saw a 21.3% increase in sales (against a target increase of 5%).

As well as cash sales, another metric of student popularity is the uptake of free school meals. Despite being free, not all eligible students take up free school meals, because the offer simply doesn't appeal. When The Kitcheneers was launched at [redacted confidential data], uptake of free school meals increased by 9.3%. When cash sales are included, figures surpass a budgeted daily target of [redacted confidential data] by 17.9%, reaching [redacted confidential data]

“At [redacted confidential data] we have blown the figures out of the park. This week the daily takings have again been above budget every day. They [the students] are loving the food that they are getting in comparison to what they had previously. It's more colourful and vibrant. There is choice, it caters for all diets and it's great that it encompasses vegetables into the bulk of all the main dishes.” –
Stuart Brown, Senior Development Chef



IMPROVING NUTRITION FOR EVEN THE FUSSIEST EATERS

The Kitcheneers is designed with nutrition baked into each dish, while remaining accessible and appetising for children - a tricky balance with fussy eaters. By aligning the brand more with the high street and marketing a more compelling proposition, The Kitcheneers became more appealing to children without alienating those sceptical of healthy foods, whilst being able to make recipe changes to improve nutrition.

Over 70% of main dishes now contain at least 1 of your 5 a day, with most containing at least two, resulting in a 35% increase in vegetable servings compared to prior the rebrand. School food used to feel old-fashioned and unappealing for children, while the new offer, which takes inspiration from the high street for brand and offer alike, has introduced buildyour-own dishes like loaded naan bread and gyros - meals that are exciting yet nutritious and more aligned to children's tastes. More kids choosing to eat more vegetables: when you make it fun and attractive, encouraging kids to eat healthily doesn't have to be a challenge.

Meanwhile, the modular nature of the offer breaks the dishes down into component parts. We created symbols highlighting ingredients to clearly label individual food modules, making isolating individual ingredients more simple, and therefore easier for children to choose a dish that suited their needs - whether for allergy, religious or simply personal taste reasons.

In a survey of on-the-ground staff, anecdotal evidence suggests students have been more experimental in their food choices as a result of the new offer and redesigned menus and marketing. Many pupils are saying how The Kitcheneers has encouraged them to try meals they would not have previously tried.

With the success of the current sell-in and new contract wins, over [redacted confidential data] students now have access to The Kitcheneers' delicious, nutritious school meals.



A TEAM REVITALISED

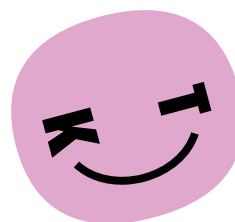
In a time of challenged employee retention and rising labour costs, employee morale is more important than ever. The new brand instilled new confidence in the proposition, while bringing teams together more frequently for 'Training Days' to boost their confidence in delivering the offer. This subsequently resulted in building stronger team relationships and networking, while demanding a higher standard of food to align with the new brand expectations.

In a 2023 internal staff survey, 94% of respondents agreed that The Kitcheneers had improved their feelings toward the brand, with 92% feeling positive about it, and all respondents agreeing that their belief and confidence in the offer for school children had improved as a result.

Alongside more powerful branding and marketing to drive engagement and participation, and better cope with staff shortages, in front-of-house, the new brand saw efficiencies in back-of-house too. Preparing base meals in advance that could be used throughout the week meant less on-the-day, and more batch cooking. This resulted in more salads and sauces being prepared on-site, upskilling the team, while using available vegetables to create the sauces (increasing vegetable intake and reducing vegetable waste). Staff felt less overloaded as a result and could focus more on preparing dishes rather than cooking, with 82% of respondents from the staff survey feeling that the new brand was more operationally efficient than the previous.

“The Kitcheneers is here to raise the bar and provide students with the level of care they deserve. Our agency instantly recognised the scale and severity of the challenge, and their work has been critical in bringing the brand’s values to life across every touchpoint. We’re excited for the future and the difference this work will make across the country.”

– James Mundy, Marketing Director



Citations and Sources:

AiP internal data
AiP client interviews
AiP staff survey 2023

INFLUENCING / MITIGATING FACTORS



Menu innovation was an important part of the new brand proposition and we partnered with AIP's development chefs and Menu Innovation Consultants to create recipes for the new dishes. The new menu was designed to a brief and concept created in our brand strategy (which included example dishes). Given the extent of brand strategy, we consider the new menu to be an output of the brand redesign and within the scope of the project.

The launch of the new brand at sites was accompanied by launch marketing, improving sales and participation. But to the extent that launch marketing was part of the design output, we consider this within the scope of the project, and its result can be attributed to design effectiveness.

Offers and promotions (e.g. meal deals) have been used during the period of consideration. However, similar offers

and promotions were also offered in the periods prior to the rebrand. Data is not available for sales driven by promotions in either period.

Whilst demand from existing clients from the new brand has been strong, AiP has limited the number of mobilisations across existing sites as demand (especially when including new contract wins) has been greater than capacity to roll it out. Results for uptake of the brand by existing sites could have been even greater were it not for this.

Sales and participation figures have been restricted to the pilot sites, as these are the only sites that have been fully activated in the academic year, allowing like for like comparisons. All other contract wins are at different stages of deployment.

WITHOUT