A case study exploring the packaging design management process within a UK food retailer

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Abstract *Food retailers invest heavily in design expertise to create exciting packaging to entice customers to buy premium food products, and to strengthen their competitive edge. The process by which food retailers manage food packaging design has not been documented and this is an oversight in the design management and retailing literatures that this paper addresses. An in-depth case study of one of the top four UK retailers is presented and their approach pack design management is analysed and discussed. The process outlined here was in place in 1997 at a time when the retailer had just moved from number three in the market place to number two and was aiming to be number one. The process documented is that of a dynamic growing food retailer working on improving its brand image through packaging design.*

Introduction

Design has been acknowledged as a strategic tool in competitive industries (Kotler, 1973; Walsh *et al.*, 1992) and is also acknowledged that there are few industries as competitive as the food retail industry (McGoldrick, 2002). This paper examines the design management processes that deliver a retail brand in an under explored design management sector, the UK food retail sector. This sector is of great interest because of the volume of design work produced. UK food retailers have greater product portfolios than any other sector, up to 40,000 product lines and develop thousands of design projects each year (Southgate, 1994). Food retailers are highly competitive and packaging design is used as a strategic tool for differentiation and to develop their retail brand equity.

The objectives of the research are firstly to outline and discuss the packaging design management process within a UK food retailer. The second

objective is to initiate some theoretical development by providing a model of the process observed in one leading food retailer. It is hoped this will provide a starting point for further work and analysis in this underdeveloped area.

There is very little theory development in the "design management" literature in this sector. Most of the literature consists of case studies describing processes in different industries; the electronics industry (Sony and Phillips in particular) has received particular attention. The literature as a result, has an "engineering" product based bias and focuses on fairly prescriptive, sequential processes. Topalian *et al.* are some of the few academics to have developed design management frameworks. This paper is one of the first attempts to broaden the scope of the design management literature (such as it is, in its primary stages) into a retail environment and a food retail environment.

This paper will present a brief summary of the design management literature. The methodology adopted will then be outlined and the results presented in a shortened case study form. Finally, the implications for design management are discussed and future directions for research highlighted.

Packaging design, design management and retail design management

The UK food retail sector is of interest for the packaging design management literature because of the volume of packaging design, with approximately 4,000 packaging design projects completed per year across categories as diverse as pet food and shampoo (Southgate, 1994). No manufacturer deals with the volume of packaging design work across categories and therefore food retailing is unique and worthy of analysis.

The first to define packs as the "silent salesman" was Dichter (1957). He argued that the pack must come alive at the point of purchase, so as to represent the salesman. Pilditch (1961) emphasised the role of packaging as a "sales clincher", to stimulate impulse sales. He continued by recognising the need to incorporate emotional values in packaging design in competitive markets. This was taken further by Lewis (1991) who stated that a pack is the physical embodiment of the core values of a brand forming the essence of the brand, and the brand's identity. Lewis also discussed the strong impact the pack designers have in a process of building relationships between the brand and the consumer.

Packaging design must create conditions that encourage the consumer to lower their psychological defences and become interested in the products cited by Green (1986). Packaging design is tactical, taking visual "cues" from the brand leaders in the design, to send the message to the consumer that own brand quality is the same as the brand leader with the aim of promoting own brands at the expense of manufacturer brands. Green (1986) also argues that the use of packaging design is not merely an exercise in "making things pretty" or to provide the right psychological conditions for the consumer to spend. Its aim is to segment a market and target a particular consumer. Keller (1991) suggests that packaging design can help customers make brand associations, which build up a

positive overall brand image. Packaging has a key role in communicating product benefits to the consumer with product benefits, according to Keller (1991), being the personal value that customers attach to the products.

Pack design can aid the consumer in the decision process through various elements of the product, for example the colour red of McVitie's Digestives helps consumers easily identify a particular type of biscuit in the market place. Wind (1982) identifies structural or functional characteristics of the packaging, which portray product benefits to specific groups of people, for example the twist in the neck of Toilet Duck toilet cleaner. Functional benefits are less subjective than aesthetic aspects of the package and consequently these should be easier to measure in terms of their impact on consumer choice. Customers attach meanings to various design elements, both aesthetic and functional, and these elements can be manipulated by the designer to achieve the strategic goals of the marketeer (Snelders *et al.*, 1993).

Southgate (1994) postulates that UK food retailers use pack design strategically to improve sales and profits. In the 1980s UK food retailers began to improve the pack design, they found that good packaging design and improvements in product quality enabled them to compete with food manufacturers directly. Southgate (1994) identified that the own label share of trade grew dramatically in the 1990's as a result of better use of packaging design. Southgate (1994) argues that the major UK food retailers are brands in their own right; Tesco, Sainsbury, Asda and Safeway are defining and communicating their own distinctive brand values through packaging design. Southgate continues by stating that food retailers use pack design to communicate the brand values, not just as a vehicle to achieve impulse purchase. A pack then, is not simply a container for a product, but it also embodies marketing strategies, brand values and sales strategies. Manufacturers and retailers have seen the impact packaging can make to sales and as a result food packaging has become increasingly sophisticated.

Dick *et al.* (1996) suggest that developing retailer brands is a powerful long term weapon against competing retailers, which helps insulate the retailer from competitive attacks. They also suggest that brand names act as a cue for consumers when judging quality of products. Cue utilisation theory (Cox, 1967; Olsen, 1972) argues that consumers employ two types of indicators or cues to assess quality of products. Direct indicators are all related to the physical properties of the product. Indirect indicators include prices or brand names. Direct indicators are often not available to the consumer so in many cases indirect indicators are used. Olsen (1972) discusses the fact that in many cases consumers use surrogate indicators that they believe are related to real objective measures. The brand name is used as a surrogate for ingredient quality. Dick *et al.* (1996) reinforce the idea that branding and packaging are very important cues for the consumer when processing information about potential purchases. Although packaging and branding may appear to be superficial concepts within overall marketing strategy in fact the time pressed consumer uses "surrogate cues" to replace "real" product quality measures when making their purchase decision.

This elevates the importance of packaging design to a higher level in marketing strategy than has been assumed to be the case historically. In competitive markets, packaging design has become increasingly important as a strategic marketing tool aiding the consumer's purchase decision process.

Brand names and symbols are the most obvious tangible packaging design cues on packs that exploit brand equity. Retailers own brand products utilise symbols and words that exploit existing brand associations for the leading brands in that product category. This effect is known as "competitive overlap" (Aaker, 1991) and can negatively affect customers' ability to recall the communication effects of a brand, by creating "interference" in consumer's memories (Keller, 1987). Packaging design management is about managing the cues coherently and effectively.

Strong packaging design identity is essential in retailing and this must be managed to create a cohesive, persuasive, shopping experience states Fitch (1991). The underlying ethos of the packaging design identity has to be clearly communicated to build the associations with the brand. For example, Sainsbury's mission is "good food costs less at Sainsbury's" and so the product design must reflect this ethos. Fitch (1991) argues that retail brand identity is a means of differentiation in that, an effective retail packaging design ensures that the consumer is so perfectly attuned with the retailer brand that they will not consider buying another product.

The retail store brand image was defined by Martineau (1958) as "the personality of the retail store". Keaveney and Hunt (1992) go further by describing the retail store image as "the overall impression of a store as perceived by consumers". Baker (1994) suggests that retail store brand image is the embodiment of an individual's cognitions that have been developed from perceptions of a particular retailer and that represent a meaning to an individual. Porter and Claycomb (1997) say that a well recognised, positive brand image is one of the most valuable company assets, and that a strong retail brand image is an essential element in retail strategy. They also contend that a powerful retail brand image encourages repeat purchases.

It has long been recognised that design is in many ways a process of order. Papanek (1984, p. 73), defined design as "as the conscious and intuitive effort to impose meaningful order". This order is of paramount importance to food retailers with the complexity and number of design messages in their stores; the retailers must manage a complex set of packaging messages in a coherent manner. Green (1986) also identified that packaging design in food retail is strategically relevant because it is essentially a way of organising products in a logical and clear manner for the customer. Products must be laid out rationally, with related products located near to each other, in order to maximise sales. This is also a function of packaging design management.

Berry and Seiders (1992) have recognised that it is vitally important for retailers to manage packaging design messages in a coherent manner for consumers, otherwise the risk is the strategic message is lost or at worst damages the retail brand identity. Managing packaging design effectively then is of key strategic value. Food retailers have seen the impact good packaging

can make to sales and as a result food packaging has become an increasingly important and strategic retail function.

The design management process has been outlined as a prescriptive, sequential process by authors such as Hollins and Pugh (1991) and Heap (1989). The first author to begin to set out a framework for the "management" elements of design management was Topalian (1994). He identified two levels of design management, the corporate level and the project level:

(1) *At corporate level*:
- Design skills contribution to corporate profitability.
- Design responsibility and leadership.
- Corporate design police.
- Positioning and "visibility" of design.
- Centralisation and integration of design.
- Auditing corporate design and design management practices.
- Developing corporate design management systems.
- Establishing and maintaining corporate design standards.
- Funding of design activities.
- Legal dimension of design.
- "Green" dimension of design.
- Design awareness and design management skills development programme.
- Design and the manifestation of corporate identity.
- Evaluation of the contribution and impact of design.

(2) *At the project level*:
- The nature of the design process and the different types of design project.
- Formulation of design project.
- Selection of design specialists.
- Composition and management of "augmented" design project teams.
- Planning and administering design projects.
- Costing design work and developing design project budgets.
- Design project documentation and control systems.
- Design research.
- Presentation of design recommendations.
- Implementation of design solutions.
- Evaluation of design projects.

Topalian proposed that it was vitally important to have a board level member responsible for design, operating as a design champion.

Topalian's (1994) definition of design management activities is concerned with implementing and planning a design policy throughout an organisation. The complexity of the process implies that it is a corporate activity that requires management and control just as any other corporate activity.

Cooper and Press (1995) developed the initial principle of a two level design management process and expanded it into a three-tiered process. They postulate that three levels of design management activity exist within an organisation: board level, middle management level and design activity level highlighted in Figure 1. The board level are involved in defining corporate strategy. Middle management levels co-ordinate detailed strategy with marketing and other functions. The design function must maintain awareness of design trends and select design specialists to carry out design work.

The process by which a packaging design with a consistent and coherent retail brand image is managed through a retail organisation is a key strategic component of developing a strong retail brand in a competitive market place and therefore worthy of analysis.

Aims and methods

The aims of the research was to document and explore the food retail packaging design management process. One leading UK food retailer was selected for case study analysis. The retailer targeted was one of the top four retailers in the competitive UK food sector. During the period under study the retailer moved from number four retailer up to number two, with aspirations to be number one. The intention was to analyse retail design management practices during this key strategic period. In all, three interviews were conducted with senior design management executives within the retailer. The results presented in this paper focus on the process outlined in one in-depth long interview with the head of packaging design.

In-depth interviews were chosen as a research method due to the complexity of the design process itself, it would take much more time to elicit the data through questionnaires for example. The retailer is a very fast moving player

	Strategy	Policy	Process Planning	People	Investment	Training	Documentation	Projects
Level 1 Board level	Design Vision, Strategic Direction and approval, creating supportive environment							
Level 2 Middle Management level	Implementing and monitoring design strategy, creating management structures, developing projects, evaluating outcome							
Level 3 Design activity/ function level	Managing design, identifying skills, implementing, monitoring and evaluating design work							

Source: Adapted from Cooper and Press (1995)

Figure 1.
A design management matrix

in the marketplace, and access to respondent's time was a research constraint. An interview conducted by a skilled interviewer would produce more data than a questionnaire would allow, enabling probing on certain key elements of the process by the interviewer. In addition, the retail design management process is an unexplored area consequently an effective questionnaire would have been difficult to produce.

The validity of the data was ensured by the careful selection of the research aims and the respondent. In addition all the interviews were tape-recorded and transcribed verbatim, along with the transcripts being sent back to the interviewee for accuracy checks (Cassell and Symon, 1994). The research aimed to study a top UK retailer's process and a top retailer granted access to data. Reliability of the data was corroborated with the use of secondary data sources, (as outlined by Sykes (1990)) such as brand manuals and corporate identity manuals and the use of interviews with other key personnel to cross check information. The data was analysed using a careful analysis and synthesis methodology that examined, categorised, tabulated and recombined the evidence provided (Yin, 1994).

A checklist of questions was used for the interview to ensure all issues were covered (see Appendix). The questions included issues such as: what is your definition of design management, how long does the design management take and so on. In addition, secondary data was collected from the company (for example, design management manuals, examples of design briefs, etc.) and about the company's performance and issues affecting the food retail market. An in-depth case was prepared, and a model of the pack design process developed.

Case study exploring Retailer A's pack design process
Pack design department
The head of design is responsible for all packaging design within the retailer; this includes categories from pet food to toiletries. There are three in-house designers, and the retailer utilises a roster of different design agencies.

Role of the head of design
The head of design manages the design agencies and is responsible for the nomination of a design agency. The design brief comes from marketing and the head of design will appoint the appropriate design agency. The project and the relationship is managed between design and marketing. The marketeer is responsible for making sure all the deadlines are met. The head of design is responsible for ensuring the product fits into the retailer's brand strategy.

Retail brand packaging guidelines
There is a packaging manual that outlines the pack design department's guidelines on the retail brand characteristics, honesty, value for money, and how to achieve those characteristics on a particular packaging design. The manual defines and explains the retailer brand characteristics. The head of

design is responsible for developing and updating the packaging manual. Minor updates of packaging design can be done independently but if a change in direction were planned then the manual would have to be approved through all levels of the company.

Retail brand packaging consistency
The retailer takes great pains to portray its corporate image consistently through marketing communications. The packaging colours are red and cream, and these are used consistently. These colours are also used on point of sales (POS) material promoting products. In this way, there is a cohesive corporate identity for the customer but it is not actually managed from a central point. The packaging design department do liaise with marketing and store design but not a regular basis. The cohesive retail brand image is managed in an informal sense.

> The informal management of our image is something to do with the fact that we have a very open company culture, very flat structured. We are always in the news and the consistency is therefore managed by our own external communication (head of packaging design).

The consistency of design and the timing is co-ordinated by the marketeer working within the trading section of the retailer; the marketeer drives the project and sets up liaison meetings.

Creating "Retailer A'ness"
The pack design department are trying to create a distinctive "Retailer A'ness", by defining some pack characteristics that must be observed, for example the scale of the retailer logo is important, as is copy readability, and products are always shown real size.

> We are very keen to build trust with consumers, so that they can believe in a pack shot as a true representation of the product. This is back down to our corporate philosophy of good honest value. It's taken extremely seriously (packaging design manager).

The retailer makes a great effort not to mislead customers about the food product inside the packaging. For example, the retailer does not try to make the product look bigger than it really is and has very strong convictions about true representations of the pack. Highlighted below are the key factors taken into consideration at when defining the packs characteristics:

- scale of Retailer A logo;
- copy readability;
- pack shots always shown real size; and
- good, honest value.

Retailer A's corporate mission statement
The corporate message or mission is "to deliver good honest value" which is an important part of the design process. Retailer A "colleagues" are aware of this

and put it into practice, as part of the pack design guidelines. The corporate mission is interpreted differently on text and in different categories. It is interpreted in terms of the category; pet food would have a different honest value than a soap powder or a food product. The pack design department do not attempt to dictate for example, that honest value will always be X, it is defined more loosely.

Good honest value

Marketing take "good honest value" as part of their guidelines on new product development. "Good honest value" permeates all levels of Retailer A, from the way the retailer works to the way that products are developed, and the type of products that are developed. The head of design considers this corporate culture to be one of the strands that co-ordinates consistent product design and development.

The packaging design brief

Retailer A's pack design department receive a written brief which outlines the target audience of the pack to be developed. The brand leaders of the segment are outlined with their strengths and weaknesses and promotional spend. The Retailer A's objectives for this market segment are outlined, for example to keep pace with the brand leader, or if the brand is perceived as a weak brand then to attempt to overtake the brand leader in sales terms. The brief will also outline the reasons for developing the new product, for example the segment is growing and the new product will be the beginning of a new product family. Alternatively the product could be repositioned because it is failing, and the reasons for the lack of sales listed below will be discussed in the brief:

- the target audience;
- the brand leaders;
- aims of the design;
- reasons for developing the product; and
- reasons for repositioning of the product.

The pack design process
Category review

The beginning of Retailer A's pack design process (see the list above) is the category review which is conducted by the category manager working within the trading group. The next stage is the feasibility study and presentation of the project to the directors, trading directors, who will then decide whether it is worth pursuing.

Feasibility study

Retailer A operates through its trading areas and each trading area has category managers, buyers, and marketers. Once the feasibility study has been

approved, the marketers or the buyers write the design brief and it is given to the head of design. The decision to reposition a product or to produce new packaging is taken by analysing the sales of the product against the brand leader and against the category as a whole. The product's sales growth must be in line with the market, if not the decision is taken to repackage the product or to delist it.

> We do not design for design sake. There has to be a reason, if a product isn't performing then we will be discussing why it isn't performing, if it's not performing because it's losing sales then we will need to know why and to analyse the packaging, redress the packaging (Head of packaging design).

There are several criteria used to make a decision in the feasibility study to redesign a product. Products are analysed if they are not performing in sales terms. It may not be the design that is the problem, for example the particular market segment may be experiencing declining sales. Or the category does not have the right fixture to be displayed effectively, or may need repositioning in the store flow, this will be determined by other departments. Some products are old and they do clearly need redesigning but Retailer A may not do it because they could not justify the cost of redesigning the product against its potential market return.

Costs signed off

The design brief is then given to the design agency, they will then provide a quote for the draft design. The costs will be approved and then the design element of the project begins.

Stage one design

The pack design department will meet the design agency and give them a detailed brief face to face. The agency will then develop stage one design, which incorporates two concepts developed to a highly finished standard. This is presented to the head of design and the marketer and/or buyer within that area. The team will come to a consensus about whether it is worth pursuing the project.

Design panel

The design agency will do more design work if needed and then the design will go to Retailer A's design panel. The design panel consists of the head of design, and the marketing director. The design panel looks at how the new product design will fit into the rest of the retailer's portfolio. So if two buyers are developing an Ambrosia cream product then they must be distinguishable, the products must be right, not copying the brand but decent value. The design brief will outline where the product is merchandised and which products it will be merchandised next to. All these elements are included in the design concept presentation:

> The design agency should present back to us the visual of the pack visual on the page and also a visual of the product's impact on the fixture (packaging design manager Retailer A).

Stage two design
If the product is approved the next stage is stage two design. Once that is completed then the design will be presented to the chief executive, who then approves the concept or rejects it.

Chief executive commitment to design
The chief executive sees every new product, there is a design panel meeting every week, and there is a regular weekly meeting with the chief executive, where he sees every new product. The meeting with the chief executive drives the whole process, buyers know they have to meet the deadlines set by the chief executive, which are every two weeks; these deadlines are built into the design brief with suppliers and design agencies. It is a fast moving process and everyone works to strict deadlines.

Artwork, reproduction and print
If the chief executive rejects the packaging design that is presented, then the pack design team has to then go back through the iterative loop of the packaging design process. If the product is accepted then the product moves forward to the artwork, repro and print stage. The retailer uses one artwork supplier, the printers are nominated by the suppliers/manufacturers of the product. Figure 2 shows in detail the process in which the pack design is created taking into consideration all the stages.

Justifying the design spend
There is no specific budget for design. The budget is influenced by the value of the product and the margin but it is not a percentage of the sales. The initial idea to redesign a product comes from marketing. The marketing department will analyse their product range and decide which products need to be repackaged. The marketing representative will go to the category review meeting with their trading manager and the proposal will be accepted or rejected. There are limits on packaging re-design spend, first, there is a time constraint. Second, it would be difficult to justify re-designing an entire product portfolio.

The importance of design to Retailer A
Pack design is a very important function for the retailer; there are specific procedures in place and tight deadlines for development. Packaging design is viewed as a strategic function that delivers brand values to the consumer.

> Design is extremely important to us, its part of the total marketing mix. It is essential to have packaging around a product on shelf and consumers judge the product by the packaging. It's very, very important because it makes a statement about us as a brand and it also makes a statement about the quality of the product (packaging design manager Retailer A).

The retailer is committed to using design effectively. There is a head of design in place and there is a roster of design agencies, the design department follows
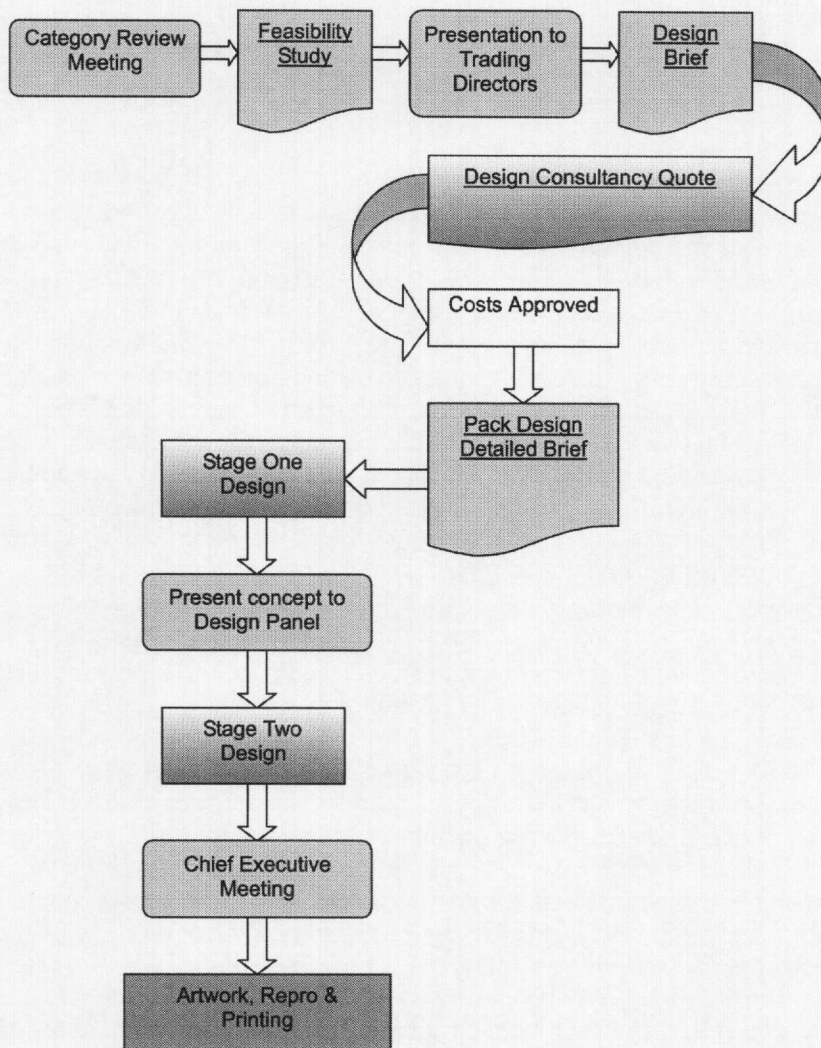
Figure 2.
Retailer A's packaging
design process

set processes and the chief executive himself sees design as very important.
Pack design is seen as part of competing in the market place, it is a strategic
function.

> Our aim is to be number one in the food retail market place. It is difficult always to do
> something new and the innovation is seen as vital for our ambition to be number one. Design
> is seen as a big part of giving something new to the consumer, whether it's the store design or
> pack design, design is part of being the best retailer (packaging design manager Retailer A).

The retailer is committed to a fast paced pack design process (defined in
Figure 2), which nevertheless is careful to interpret brand values that have been

developed extensively in-house. There is a brand manual and a head of design to ensure all pack design fits in with the corporate brand strategy of the retailer.

Case study analysis

The retailers pack design process is strongly influenced by the company culture, which is open and informal. There is a family feeling to the relationship with the design agencies. The retailer makes a lot of effort to develop their retailer brand values, and interprets these precisely and carefully through packaging design, for example the value of "honesty" is highly valued. The volume of new product development is critical, this retailer wants to revamp all products very quickly to keep up with the market and become market leader. Much of the packaging design process is geared to speed and delivering on time. A very important feature was the prominence of the retailer logo on pack, this was paramount to the chief executive, who was developing a brand to compete with Proctor and Gamble and it was not a me-too, aiming clearly at brand in its truest sense. The retail brand had at its heart the "good honest value" brand values, which was developed with the zeal of a brand looking to develop trust, consistency and a long-term relationship with the consumer. The pack shots were scrutinised to ensure they delivered the brand values and hence brand equity in the chief executive's strategic plan. The design agencies tend to be long term relationships to ensure consistency and also speed of production, the brand values are communicated to them and they are brought in as part of the team. Interestingly, suppliers, manufacturers, and agencies have to work in the retailer's culture, to the retailer's deadlines. This ensures a brand identity is developed. The manufacturers do not have the power in this situation; they are developing the retailer's brand to their deadlines and values.

The main themes analysed in the research included the briefing process, the sourcing design process and the design evaluation process. Also the methods used to integrate design into other corporate functions within the retailer. These were found to be mostly embedded within the chief executive, who had a clear vision of the brand and worked hard to develop a consistent and cohesive brand image.

The limitations of the research are that only one retailer was examined, improved validity and reliability would be added by interviewing all UK food retailers and additionally by comparing results with other retailers in different sectors. This would give more perspective and highlight differences and similarities of approach. Another limitation is the fact that the design suppliers and the manufacturers of the products were not included in the research; this would add additional perspective to the reliability of the results.

The implications for future research are that this paper has started the process of theory building in the retail design management field with the model presented. More retailers should be added to the model building process and the views of manufacturers and design suppliers should also be incorporated.

The implications for marketing managers are that the retail sector appears to value design highly as a strategic process and invests heavily in packaging design. The packaging design management process is a highly efficient, deadline driven process, with the retailer driving forward own brand values aggressively in a competitive market place.

Conclusion

The pack design process is concerned with developing the retail brand through its packaging. The head of packaging design's role was defined as "to make sure the product fits into the retail brand strategy". The brand was very important within the design process, the central reason for the design manager's existence. There is a brand manual and a corporate identity manual but no packaging design manual because there are so many products within so many categories that the manual would be too time consuming to develop. The brand manual is the guide for packaging design; packaging has to be interpreted in terms of the brand. The business culture seems to be influential; there is an "energy" about retailer that drives forward innovation. Much of this culture seems to stem from the chief executive. There is board level personal involvement in the packaging design process. The retailer is committed to using pack design effectively. There is chief executive level personal involvement in all design projects. The brand is an important part of design management. Design managers must understand the brand and be able to communicate the brand to design consultancies.

There is little research and negligible theory development in the area of retail design management. Further research could involve developing a stronger theoretical base that included a framework for research developed from several sectors of design management.

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Appendix. Interview question checklist

(1) How is your company structured? Does this help or hinder the design management process?
(2) Who is responsible for packaging design? Does design have board level representation?
(3) What is your process for sourcing a packaging designer?
(4) How do you evaluate whether the packaging design is successful or not?
(5) How do you evaluate the need to redesign a product?

(6) What elements do you include in the design brief?
(7) How integrated is design into your company processes? Is design considered a core business process?
(8) Does your company have a design policy?
(9) Does your company use cross-functional teams to develop design projects.
(10) How many people are employed in your design department?
(11) Can you outline the packaging design management process from initial idea to final production?
(12) How is finance raised to fund new packaging designs?
(13) Is there a design champion within the company?
(14) What is your role within packaging design in your company?
(15) What is your corporate mission statement?
(16) How is this mission communicated throughout the company?
(17) How is the value of design communicated throughout the company?