

BUSINESS CASE STUDY
CANDIDATE NUMBER: 13460
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WHAT

About PG tips

Founded in 1930 [1], PG Tips is a UK based tea company that sells a limited range of black teas. The company is part of Brooke, Bond, and Co., started by Arthur Brooke in 1869 [2], [3]. Brooke, Bond, and Co. was bought by Unilever in 1984.

PG Tips has a focused product line that revolves around black tea. Although non-black teas are listed at the online supermarket Ocado (camomile, raspberry, earl grey, green) [4], they are not listed on the PG tips website [1] and therefore will be considered as discontinued in this report.

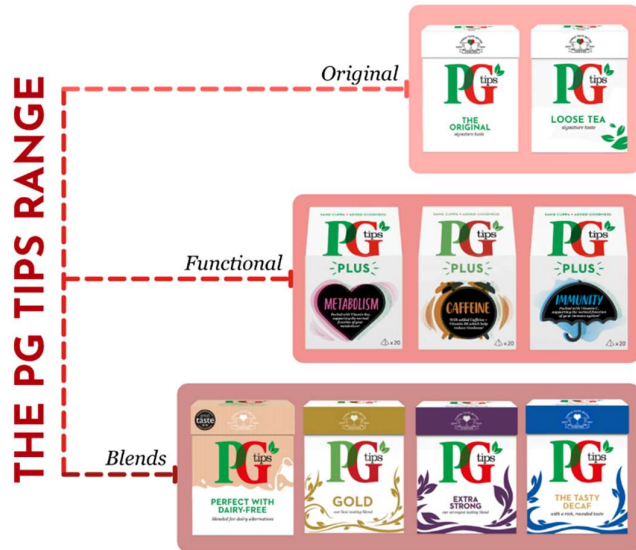
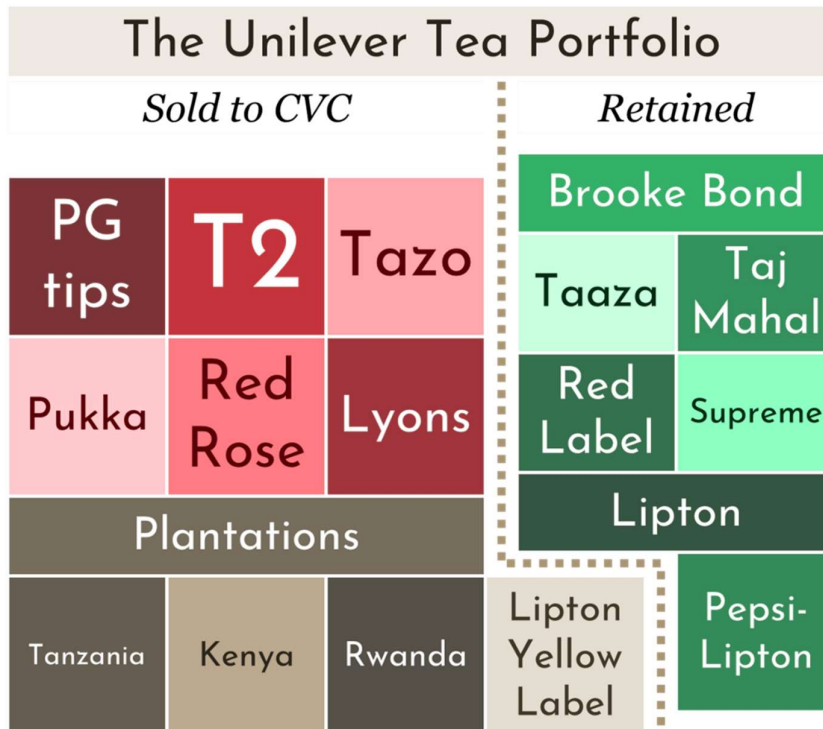


Figure 1: The range of products available on the PG tips website.

PG tips are famous for their iconic pyramid tea bags, first released in 1990, that claim to act like “miniature teapots.” [1] They have several iconic marketing campaigns, starting in 1956 with the PG Tips monkeys, “The Tipps family.”

Until 2019, PG tips was the highest selling tea brand in the UK, however, Twinings overtook in 2018 after introducing new ranges of herbal and functional teas [5]. As a result of declining sales year on year, Unilever has recently sold most of ekaterra, including PG Tips, to CVC capital – a private equity firm – for €4.5 billion [6]. The total perimeter of the sale is outlined below.



WHY

Where Does PG tips Compete?

PG tips competes in the hot beverage market, which is dominated by teas and coffees. The UK is a key market for tea drinkers, importing more tea than any other European country (excluding Russian Federation) [7].

PG tips fit into the Unilever portfolio of beverage companies by supplying budget-friendly black tea. Lipton, another Unilever brand, is famous for their “yellow label” black tea [8] and cold brews, and Pukka/T2 are aimed at the luxury market [9], [10].

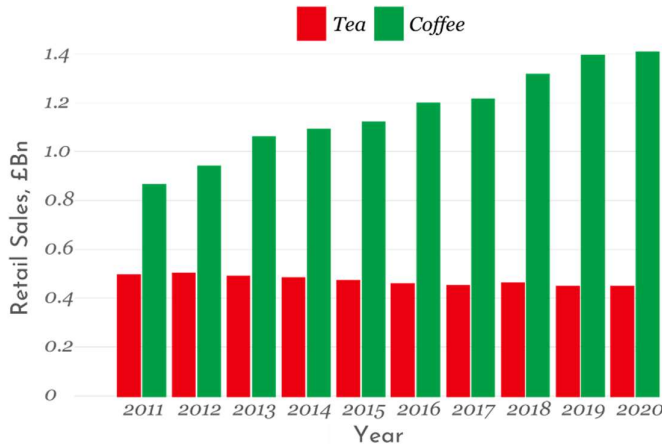


Figure 2: Sales of Tea and Coffee in the UK in the last decade[11]

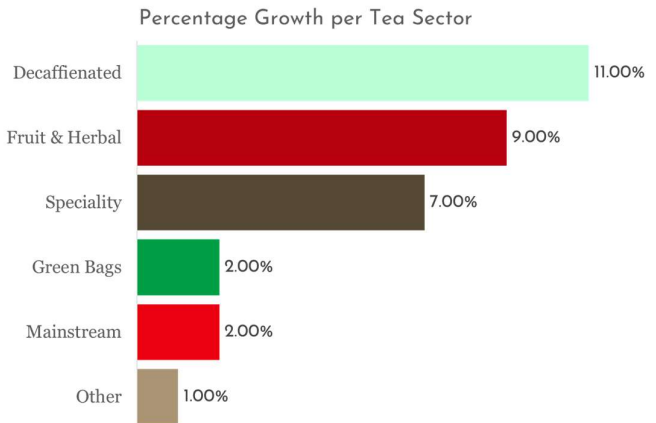


Figure 3: Percentage Growth per Tea Sector in 2018 [12]

There has been an increase in popularity for tea as a health beneficial (functional) beverage, with green teas and teas with added health benefits taking a larger proportion of the market share [12]. The sudden rise of tea-based drinks, such as matcha [13], over recent years has brought attention to the sector, but also pushed black tea out of the limelight. [14]

Who Drinks PG tips?

PG tips' value proposition for their customer base is to provide an affordable black tea that has a superior flavour to other brands.

Tea drinkers are an ageing population, with younger generations choosing coffee over tea. Figure 4 shows how younger generations are drinking black tea less frequently. Fans of black tea are unlikely to budge soon, so the challenge for PG tips is to attract new customers and steal customers from other black tea brands. Fighting to keep the current customer base is less of a worry [15].

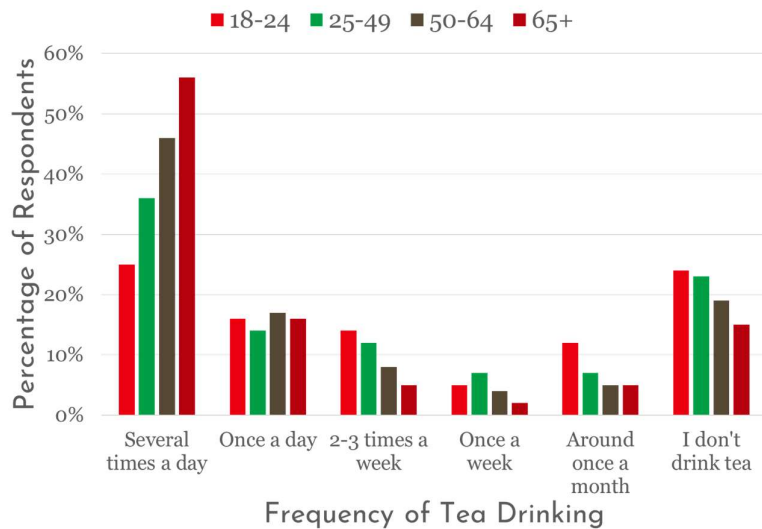


Figure 4: Frequency of Tea Drinking per age group [16]

Who Is Threatening PG tips' Market Position?

PG tips' main competitors are Tetley, Yorkshire Tea and Twinings. In 2019, Twinings overtook PG tips as the highest valued tea company, with the addition of cold infusion and functional teas giving Twinings a nearly 4% increase in value, whereas PG tips suffered a 7.6% value drop[5]

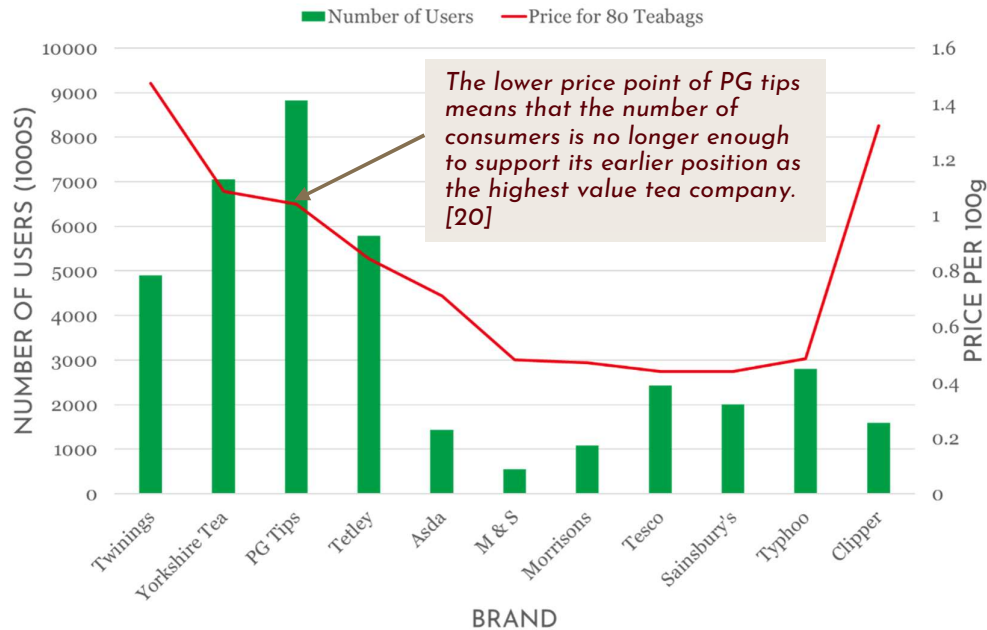
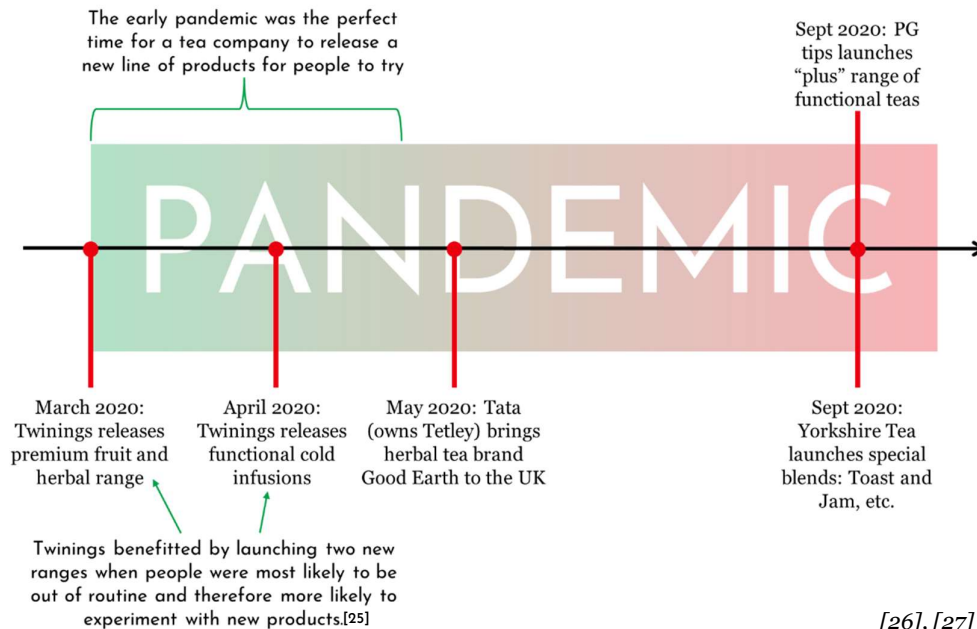


Figure 5: Number of users of leading black tea brands in the UK in 2020 vs the average price per 100g for that tea [4], [17] – [23]

How Did Lockdown Affect the Tea Market?

The national lockdowns in 2020 were a critical time for tea companies across the UK. With the sudden rise in people working from home, tea sales shot up by 21% from 2019 as people relied on their kettles for sustenance throughout the working day [24] [25]. It was an excellent opportunity for tea companies to capitalise on the sudden influx of customers. In response to the pandemic, consumers also turned to more premium brands for added luxury as out-of-home hot beverages were no longer available. PG tips perhaps missed the boat, releasing their functional tea range in September, after the first lockdown had ended [26].



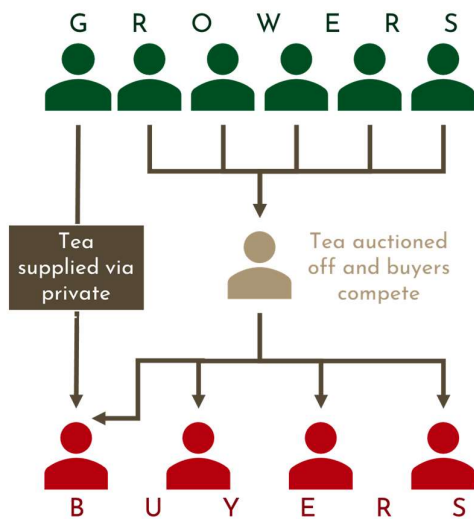
[26], [27]

HOW

How Does a Budget Tea Brand Reduce Costs?

PG tips undertakes three key activities: Buying, Blending and Tasting (or Quality Control). As one of the cheaper branded black teas in the UK, how does PG tips ensure the tea that they buy is good value?

When Arthur Brooke named PG tips, he included the word “tips” to show to the customer that the brand only uses the “tip” of the plant [1]. This is purely marketing, as this applies to every tea brand, but certainly impresses the unsuspecting customer.



A brand will buy tea in one of two ways: through a weekly auction, or with a private contract [28]. Private contracts allow for more control over the tea quality, but auctions create competition between brands away from the supermarket floor.

The way that tea is produced largely affects the price of the crop. Unilever will have control over the production of the tea on their own plantations, so cost-cutting can be explored both at the producer's level and the packer (PG tips)'s level.

Tea is very labour intensive in most countries: leaves are handpicked [29], so the easiest way to make producing tea cheaper is to mechanise the process. In Kenya, many tea estates use handheld harvesters rather like hedge trimmers [30].

Costs of production fluctuate in tea growing due to external factors such as weather dependence and reliance on manual labour affecting crop yield. For quality control, PG tips must continue to buy tea from the same regions to maintain their flavour profile, so fluctuating costs cannot be entirely avoided if one of these regions has a bad year.

The other way to reduce cost is by economies of scale. This could mean planting higher yielding bushes, applying fertilizer to increase crop yield, and buying in more leaf from smallholders or other producers.

PG tips then blends and packs the tea. Costs can be reduced here by increasing automation: to reduce labour costs and increase packing efficiency. Other input costs to lead to the finished product include packaging, marketing, overheads, distribution and finally profit margin [31].

How Does PG tips Interact with their Key Partners?

The key partners of PG tips will be the same as other tea companies, sparking competition at every level. Supermarkets will set up contracts with the individual tea companies that specify the shelf space provided and profit margins applied [32]. PG tips encourages supermarkets to pitch their items at a low profit margin so that they are more desirable to the shopper compared to the other brands on the shelf. Their high number of users (therefore high number of sales) is an attractive pitch to any supermarket. There are 70% more PG tips products available in Tesco's than Waitrose because of this: Waitrose applies a higher profit margin (£1.08/100g), so PG tips appears less affordable to the consumer than in Tesco's (86p/100g) and therefore will have lower sales, meaning less reason for Waitrose to give PG tips shelf space [18], [22].

How Does PG tips Engage with Customers?

A strength and differentiator of PG tips is their ability to produce high quality marketing that makes an impact on their target audience. They cover all channels, using TV adverts, social media, magazines, billboards, and their own website. The average customer would buy their tea in a physical (or online) supermarket, rather than directly through PG tips.

Over the years, PG tips have launched a series of marketing campaigns that have kept the brand's popularity with consumers. The PG tips marketing strategy is to stay memorable to customers, to stand out against the rest.



1956: The "Tipps family" campaign, featuring celebrity voiceovers and live chimpanzees, ran for over 40 years and initially took the brand from 4th to 1st in the tea market. PG tips capitalised on the success of the adverts by also launching a range of collectible cards and figurines, keeping the brand relevant and desirable to consumers [33] [37].



2002: Animal rights campaigners forced PG tips to change their advertisements to maintain a positive customer relationship. The T Birds, created by Aardman, featured a group that were relatable to 20-something year olds, to appeal to a younger audience [34].



2007: a series of adverts with Johnny Vegas and a puppet called "Monkey" was released, re-cataapulting the brand into the limelight. Monkey merchandise became sought-after for years [35].



2015: To appeal to a younger audience, PG tips developed new branding with a minimal look. The Keep it Tea campaign featured Monkey in a series of images that paid homage to modern pop culture moments [36].

All these high-profile ad campaigns were used by PG tips to keep a position in pop culture and differentiate themselves from the other tea companies. They also used each ad campaign as an opportunity to sell merchandise alongside their teabags, which have more stable costs of manufacture compared to tea.

Another key marketing point for PG tips is their iconic pyramid shaped tea bags. The tea bags claim to allow a better flavour due to increased movement of the tea, which appeals to customers [38]. Although they are not the only tea company to release pyramid shaped tea bags, PG tips are the only company widely recognised for them. They have registered "pyramid" as a trademark to protect their brand and prevent other brands from claiming the same unique selling point that they have, giving consumers more reason to try and/or stick to PG tips.



STRATEGY

HOW UNILEVER HAS SHAPED PG TIPS

Unilever, and within that PG tips, work on the mass market strategy. Their goal is to sell as much as possible with very low profit margins. This means the tea that they buy is cheap (as discussed above), the packing stage is highly automated, and they work to improve their economies of scale.

The Key Strategic Problem for PG tips

As a company that only sells black tea-based products, the main strategic problem for PG tips is:

Black tea drinking is in decline, because the core demographic is aging, and young people are choosing coffee over tea.

As a tea company, it is therefore important to have two guiding policies:

- 1) To keep the current customer base (customer retention)
- 2) To attract new customers from different demographics

Customer Retention

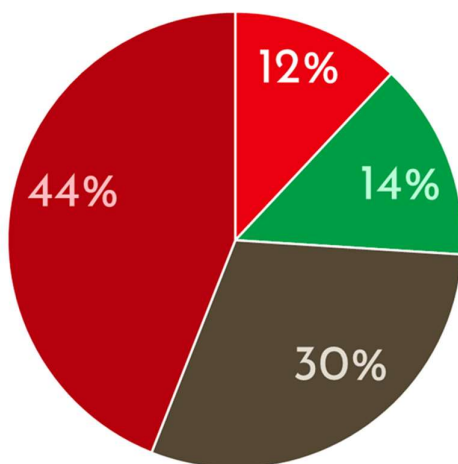
As mentioned earlier, tea customers are generally loyal to their chosen brand and stubborn in their drink choices [15]. PG tips have used several techniques to ensure their customers have incentive to stay.

PG tips has released a range of personalised PG tips mugs, giving fans a personal connection to the brand. They offer gift sets of couple's mugs, single mugs and even egg cups [39]. This appeals to their current user group, who overall, are more likely to be older and have "slow breakfasts" or use their mug in their home more often. The couple's mugs are likely to be bought by "old married couples", or young adults looking for a gift for their parents.

PG tips have continued to launch advertising campaigns on satellite TV; a demographic that aligns with their customer base

Percentage of Freeview Viewers

■ 16-24 ■ 25-34 ■ 35-54 ■ 55+



Weekly Expenditure on Tea

■ <30 ■ 30-49 ■ 50-64 ■ 65+

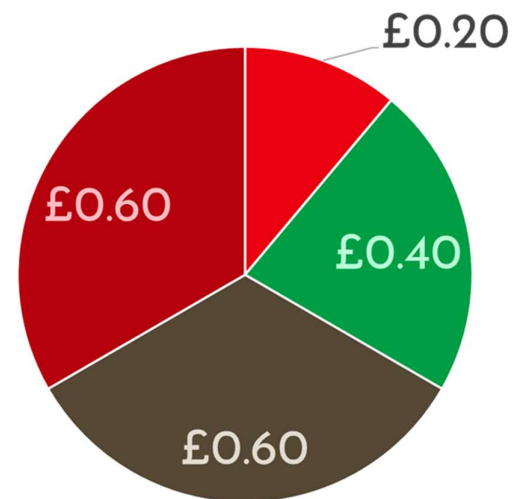


Figure 6: Similarities between the age of TV watchers and tea drinkers in the UK [40], [41]

Appealing to New Customers

To adapt to the changing customer focus, PG tips have launched a range of teas that base themselves upon their classic original black tea. “Perfect with Dairy Free” was launched in 2018 to target the consumers joining on the rapidly expanding dairy-free and vegan culture [42]. By marketing something specifically as for dairy-free, it appeals more to customers actively seeking out these products. PG tips can therefore apply a higher profit margin than their regular tea and it will still sell. Another product launch targeted at a new market region is the PG tips “Plus” range, which is a range of three functional teas [27]. This range aims to appeal to a recent shift in consumer outlook that tea is a health & wellness beverage. The “Plus Caffeine” tea specifically targets coffee drinkers who are after a larger pick-me-up in their drink. This particularly is a great approach to try and fight back against coffee’s market domination.



PG tips have expanded their advertising approach to attract a younger customer base. By moving their advertising to social media as well as on TV, they reach a younger demographic who are more likely to use social media and less likely to watch TV [43].

Horizon Scanning

PG tips will be looking at current trends in hot beverage consumption to plan their next strategic moves. It is likely that black tea consumption will continue to become less popular, and coffee will continue to rise. Trends that may be considered by the PG tips R&D department are more health and functional teas or fermented foods [44].

PG tips has previously launched a herbals range, but the brand was not trusted by consumers to make good herbal tea, so it was a flop [45]. To develop into the herbal tea market, Unilever decided to acquire T2 to expand the herbal side of PG tips that hadn’t worked under that brand name [46].

Was PG tips Hindering Unilever’s Strategic Targets?

Unilever has published their overarching goals which filter into each of their subsidiary companies, including PG tips.

Our Purpose Is to Make Sustainable Living Commonplace

The Unilever Compass [47] has a strong emphasis on purpose – that by having a clear purpose, each of their individual brands can work towards a common goal. They then go on to list five fundamental targets to support their purpose statement [48]:

1. Accelerate in USA, India, China, and key growth markets
2. Develop our portfolio into high growth spaces
3. Improve the health of the planet
4. Improve people’s health, confidence, and wellbeing
5. Contribute to a fairer, more inclusive world

In the US, ready-to-drink tea, such as Lipton iced teas, dominate the market [49], and Lipton was deliberately expanded globally by Unilever to allow PG tips to expand in the UK. Out of hot tea consumers in the US, less than 50% drink black tea compared to the UK’s 68%. It is therefore not an attractive region for PG tips to develop in.

The Chinese tea market is very difficult to enter as a non-Chinese brand since they hardly drink imported tea [7]. As tea’s founding nation, the view of the Chinese market is that they

have always produced high quality tea and therefore see no reason to import it. Interestingly, the Indian market is very different. Unilever has retained the part of Brooke, Bond and Co (Red Label, Supreme, Taaza, Taj Mahal) that is sold in India [50], because they believe it is a highly profitable part of the brand.

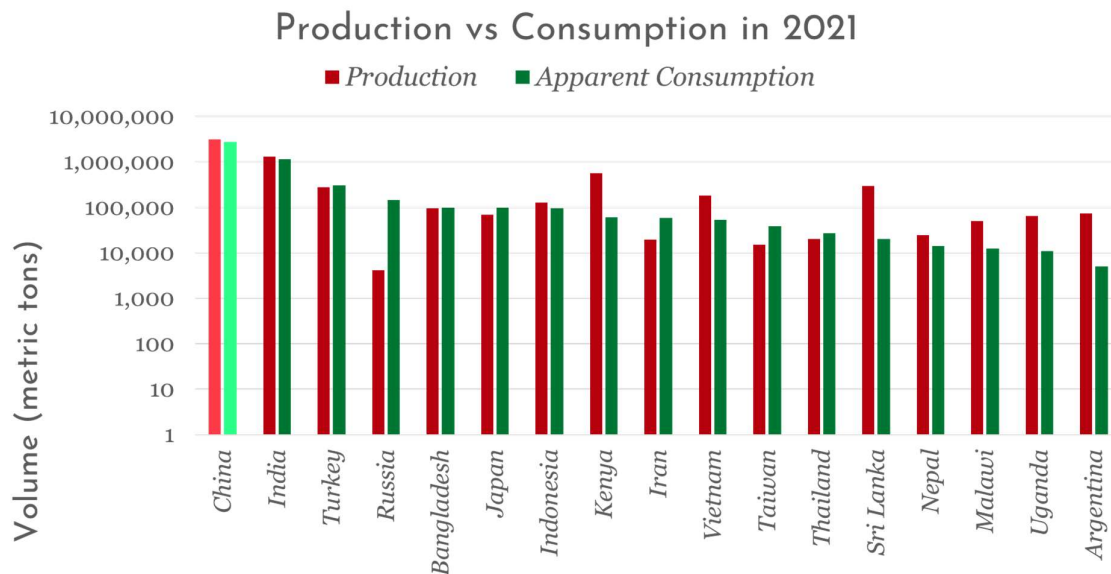


Figure 7: The production and consumption of tea in 2021 by nation. Consumption is estimated by totalling production and import per country and subtracting exports. [7]

For these reasons, PG tips could not fulfil target 1, and black tea is not a high-growth space which conflicts with target 2. For Unilever, too few targets could be attained with PG tips, so it was not worth keeping. After some horizon scanning and the already tried and failed herbal tea range, Unilever decided that the company would likely continue to lose money and therefore become a hindrance to Unilever and their profits.

The Struggles of a Sustainable Tea Industry

As part of the Unilever compass, there is a strong emphasis on sustainability and ethical changes. As part of their sustainability targets, Unilever made PG tips part of the rainforest alliance [51], the ethical tea partnership [52], and introduced biodegradable tea packaging to all their teabags [53]. Part of the marketing strategy for Unilever, and therefore PG tips, is to produce brand connotations with sustainable and ethical practise. PG tips have used the rainforest alliance certification to “cause market”, featuring the certification as the focal point of an ad campaign in 2008 [54].



The Ethical Tea Partnership is an organisation that works with tea companies globally to help support and encourage the fair working conditions of tea producers. Due to tea plantations often being in very rural areas, cultural and systemic changes are slow and often perceived by the western media as “not enough,” often resulting in media storms [55]–[57]. With changes to how tea plantations are run taking longer than the media and consumers can accept [58], Unilever have been discouraged from holding on to a business sector which can be clouded by bad press.



What Are CVC Likely to Do with PG tips?

CVC are what are known as venture capitalists. Their business model is to transform a company in a very short period (4 to 5 years) and sell it for as much profit as possible. They are likely to slim PG tips down so only the highest value parts of the company remain.

CVC may decide to cut down PG tips products to an even more limited range. They would retain the “Plus” and “Dairy Free” range, as they’re able to be priced with a higher profit margin, and they would keep “Original” as it’s the best-selling product [59].

CRITIQUE

PG tips is now in its last few months under Unilever ownership, with the transfer to CVC due to complete later this year. What could CVC do to return PG tips to its former glory?



Maintain Advertising as A Strength of PG tips

Advertising is one of the strengths of the PG tips brand, so CVC should continue to fund PG tips advertising campaigns that will capture people’s attention. PG tips should outsource for another marketing campaign that will boost their popularity again, perhaps phasing out Monkey for a new brand ambassador to mix things up.

PG tips should continue to advertise on TV to ensure that the current customers are retained. They should also look to advertise on channels that have a younger viewing audience. For example, ad breaks during the Love Island broadcast, would reach a huge number of younger consumers, and Friday nights on Channel 4 [60]. Love Island has an average of 5 million viewers per episode and 43% of viewers are under 30. The intense viewing schedule means there is plenty of opportunity to catch the attention of a younger customer demographic [61]. By coupling this with continued advertisement on social media, PG tips’ presence with a younger audience would increase.

PG tips should continue their gift sets but expand them alongside a successful advertising campaign as this worked so well for them with Monkey.

PG tips could use their existing stock with Waitrose [22] to replace these lines with their more premium lines, Gold and Plus, to compete with the higher quality (and higher price point) teas that Waitrose stocks.

Waitrose



Re-Assess Sustainability Policies to Improve Customer Retention

There are countless negative reviews of PG tips’ biodegradable tea bags [62] and PG tips are at risk of losing their core customers due to the change. This is a problem faced by whole tea industry, with plastic being used in the glue that adheres the bag shut [63]. The pressure [64] from the public pushed PG tips into releasing their biodegradable teabags before they were ready for market and have resulted in lack of customer support for the brand. Other brands,

★★★★★

Pyramid bags splitting

★★★★★

Bags splits

★★★★★

Splitting tea bags

★★★★★

Failure of Tea Bags

★★★★★

The bags split

such as Yorkshire Tea, continued to use plastic and provide their customers with frequent updates on their research into biodegradable bags until they were ready for release [65]. Concern about climate change is more prevalent in younger age groups than older [66], [67], and since black tea drinkers are generally older, switching the tea bags back to with plastic will not detract the core customers as much. PG tips could continue to produce their biodegradable tea bags but as a separate line to their original range, so both options are available to the consumer whilst more R&D is done to produce a more reliable tea bag.

To reinforce PG tips as a sustainable company, more emphasis should be placed on the memberships PG tips has with the ethical tea partnership and rainforest alliance certification. These will attract the climate conscious

[1] customer to the brand. A survey by Deloitte has shown that around 30% of consumers will actively change their shopping habits if a brand has positive or negative climate credentials [68].

Diversify The Brand to Keep Up with Current Trends

A market area popular in Europe that could be brought into the UK is flavoured black teas. An additional product, such as a trendy “chai spiced” flavour [69] in a black tea would be a gentle introduction to that market area and could steal customers from Twinning’s (who are the only tea brand of the main four to sell chai flavoured black tea). Pukka herbs are also owned by ekaterra, the parent company that has been bought by CVC. CVC could exploit the expertise that tea blenders at Pukka Herbs can provide to give PG tips more knowledge in the herbals area. PG tips blenders can then combine the knowledge from Pukka with their cost-cutting expertise to produce a flavoured black tea blend that will appeal to a new customer base.

PG tips could target a higher-paying customer base by releasing a luxury tea beyond their “Gold” product. A change in tea production would be required, with hand-picked tea leaves and a more expensive processing method that keeps the leaves more intact [70]. This enhances the quality of the tea and therefore raises the price and could be attractive selling points to a wealthier customer.

Selection boxes of a PG tips range, such as the Plus range, could be attractive to customers as a gift idea or a way of trying the new ranges without committing to a whole set. This would pull more customers in to trying the products and hopefully convince some to stick to drinking PG tips.

PROPOSED NEW PRODUCTS FOR PG TIPS



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