



Project title: No 3 London Dry Gin  
Category: 4.0 Packaging  
Sub-category: 4.2 Branded – Drink  
Client company: Berry Bros & Rudd  
Brand Agency: Brandhouse  
Current Date: 18th July 2011

**BRANDHOUSE**  
STRATEGY + CREATIVITY

# EXECUTIVE SUMMARY

## *This is a story of the power of 3*

This is the story of how we named No.3 London Dry Gin after the home of Berry Bros & Rudd in St James's Street – a company with 3 centuries of wine and spirits expertise; and how this evocative brand name and distinctive identity provided the platform for success.

And how the original key to the parlour of No.3 St James's Street was at the heart of not just the design but also the marketing platform as a whole.

This is the story of how 3 of the world's leading hotel bars in London were handpicked to be the first to stock the brand – The Coburg, Fleming's and Dukes; and how it was developed specifically to provide the basis for 3 classic cocktails.

And how this award winning spirit uses 3 fruits and 3 herbs to create its distinctive taste.

Offered for sale originally in 3 countries (UK, Spain, USA) the brand has been sold in 10 further territories.

In the first 12 months sales outstripped the budget of 6,700 cases by 62% achieving a total of 10,800 cases. Spain has proven to be the main market with sales outstripping targets by 160%.

The appeal of the brand and its packaging has been so pervasive that it has now been listed in 30 key Waitrose stores – a move into the off-trade much sooner than planned.

Thanks to the unique presentation of the brand it has phenomenal bar presence – a look and story that appeals to consumers and a bottle that mixologists love.

At a price point 15-20% higher than Tanqueray 10, a key competitor, and 3 times the price of ordinary gin, the success of the brand is all the more remarkable.

*(Word count 290)*

# PROJECT OVERVIEW

## OUTLINE OF PROJECT BRIEF

### *The vision for No. 3 London Dry Gin*

No. 3 London Dry Gin will be available in all super-premium bars in the major cosmopolitan cities of the world.

It will be recognised as the best London Dry Gin you can find for a Classic Dry Martini.

Treasured by those who drink it, and recommended to friends and companions.

We were tasked with identifying the most motivating premium positioning for this new super-premium dry gin and then building the brand story into a name, brand identity, bottle design, secondary packaging and website to bring this story to life.

Key to success was to engage with and appeal to pre-eminent barmen and Martini gurus in those super-premium bars around the world.

Targeted sales for the first 12 months to end March 2011 were 6,700 cases.

No.3 London Dry Gin was to launch in 3 key countries – UK, Spain and USA.

## DESCRIPTION

### *The Company*

Berry Bros & Rudd was established in 1698 and has 300 years of expertise, earning a reputation as the pre-eminent wine and spirit authority. BB&R has an obsessive concern with sourcing, provenance and quality allied with an unparalleled service – a tradition of the extraordinary.

### *Their Portfolio*

No. 3 London Dry Gin is Berry Bros & Rudd first major foray into the gin market. Although it may be seen as counter intuitive, given the prevailing recession, BB&R identified a growing trend towards super-premium gins.

### *The Competition*

The super-premium gin market is dominated by 2 key players: Hendricks with 53% global market share and Tanqueray 10 with a 20% global market share.

### *The Product*

No.3 London Dry Gin – 3 centuries, one perfect gin.

Calling on the history of gin, No.3 London Dry Gin pays homage to the original recipes for London Dry Gin with a strength of juniper unusual in the modern market.

No.3 London Dry Gin combines just 3 fruits with 3 herbs & spices, collectively known as botanicals to deliver its unique organoleptic profile.

Juniper berries sourced in Italy, sweet orange peel from Spain and Turkish grapefruit peel are married with Moroccan coriander seeds, Dutch angelica root and cardamom seeds from Guatemala.

The gin is distilled in a traditional copper pot still in the original home of gin – Holland. The sophisticated, classic recipe makes No.3 London Dry Gin the ideal ingredient for a classic Dry Martini or a gin and tonic. The Master Distiller worked closely with Dr. Clutton, internationally renowned gin expert, to ensure each batch is perfect. It is made to a proprietary recipe by distillers with over 3 centuries of experience and expertise.

At 46% ABC No.3 London Dry Gin is the ideal strength for a Dry Martini.

In order to guarantee the most delicious product, perfect for a dry martini we worked alongside a small panel of global experts and now brand evangelists, including Dr David Clutton (PhD on the flavour of gin), 3 eminent spirits writers Dave Broom, Anastasia Miller and Jared Brown, and Alessandro Palazzi (head barman at Duke's Bar and "Martini genie").

### *Pricing*

No.3 London Dry Gin was launched with a retail price point at a 15-20% premium to Tanqueray 10 at £32.95/\$39.99/EUR34.99 and 3 times the price of ordinary gin.



## OVERVIEW OF MARKET

### *The Super-Premium Gin Market*

The global super-premium gin market was 254,000 cases in volume terms and £67.5m by value in 2009.

If the current 16% CAGR (compound annual growth rate) continues, super-premium gin will top 1,000,000 cases by 2020.

*Source: IWSR 2009*

USA, Spain and UK represent 82% of total super-premium gin sales and growth rates are healthy with Spain at +84%, UK +37% and USA +6% CAGR.

The market is dominated by Hendricks (136,000 cases) and Tanqueray 10 (50,000 cases) with 5 other brands each representing approx 10,000 cases each.

### *The Global Context*

No.3 London Dry Gin was launched during a global economic recession in 2009.

However, "quality, less often" has been the general response to recent pressures, rather than down-trading. A taste for finer things and personal reward was expected to propel sales of premium goods. Scarcity and exclusivity were seen as key luxury drivers.

## PROJECT LAUNCH DATE

March 3rd 2009 at 3pm

## SIZE OF DESIGN BUDGET

Total investment in design was between £60k and £80k.

## OUTLINE OF DESIGN SOLUTION

### *The Brand Name*

Having considered a number of design territories, No.3 London Dry Gin was identified by us and our client, with input from our expert panel, as the ideal brand platform for the creation of a brand story that fuses the 3 centuries of tradition of Berry Bros & Rudd, and their home in St James's Street with the modernity of the perfect London Dry Gin for today's most discerning Martini drinkers.

Given the global aspirations for the brand, the name has the added and important advantage of being easily understood across markets.

No.3  
EST 1698

LONDON  
DRY GIN

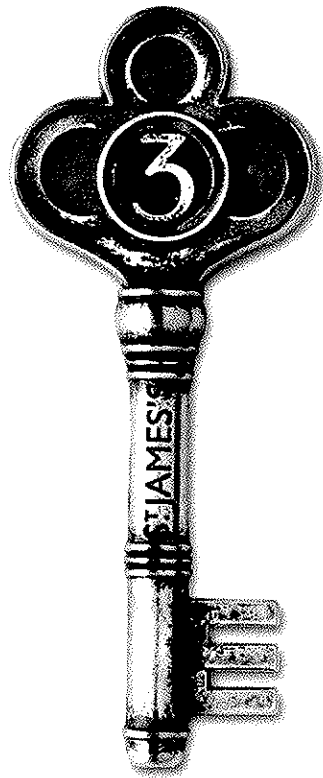
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BERRY BROS & RUDD  
No.3 ST JAMES'S STREET

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## *The Key*

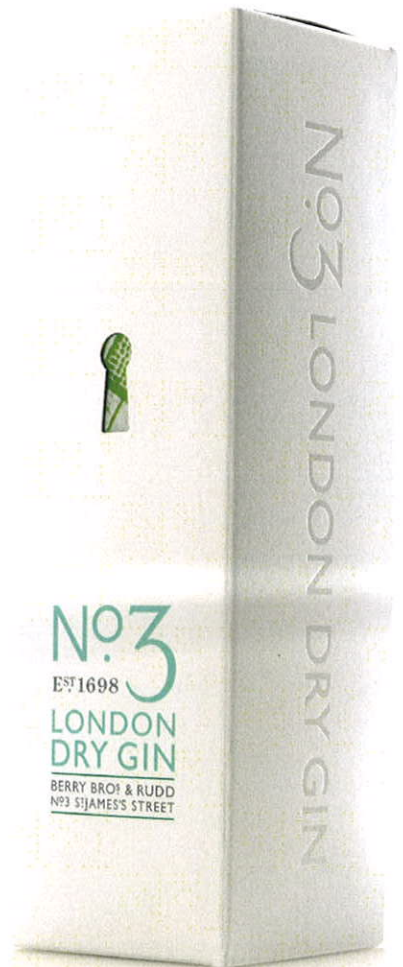
The original key to the cellar at No.3 St. James's Street provided the inspiration for the core brand icon. Sitting proudly in the centre of the bottle, a faithful replica of this key draws in the eye and ensures additional 'back bar' standout. In addition, it provided the inspiration for much of the marketing material.





## The Packaging

The crafted brand identity fuses the fine traditionality of Century Old Style bold with the clean modernity of Gill Sans to create a sophisticated unit that sits proudly on a clean, crisp, high gauge card carton in a cool premium colour palette of pale blue and deep green. Beautiful detailing of embossing and the simple telling of the brand story on the reverse, invites customers to look through the keyhole cut out to the bottle within. A rich green carton interior gives way to a bottle wrapped in tissue paper, printed with an historical map of the address of Berry Bros & Rudd at No. 3 St James's Street.



## The Bottle

The bottle itself was developed in partnership with the glass supplier and pays homage to the original Genever gin bottle. Subtle, sophisticated tweaks were made in consultation with our expert panel, to ensure it works for the modern mixologist – a longer neck to make it easier when pouring, flat sides so that it sits well in the freezer and special glue technology to ensure that the iconic key stays in place whatever the temperature regime.

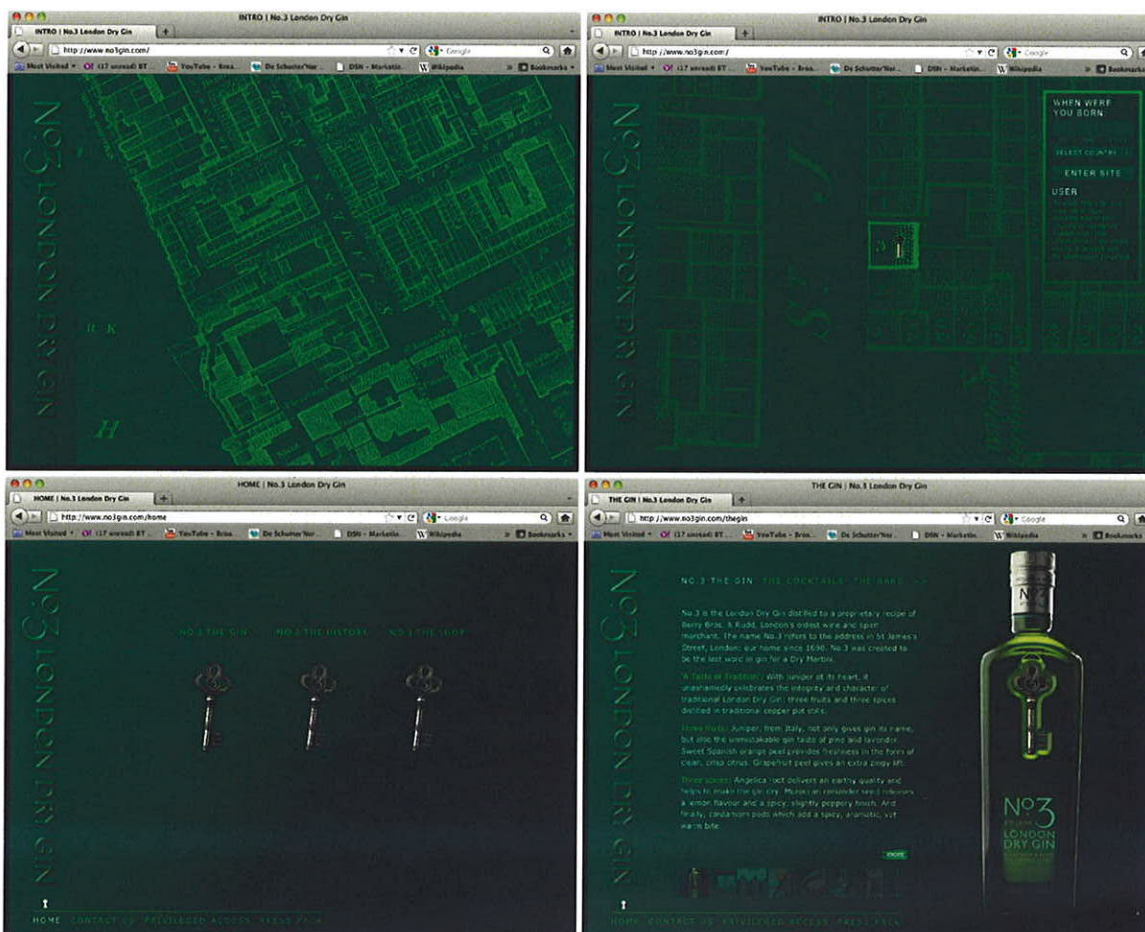
Mirroring the debossed identity on the carton, the bottle has embossed copy on both sides and debossed detailing on the front pack in which the metal key – a replica of the original from No. 3 St James's Street – sits; providing a distinctive and ownable brand identity.

All the text on the bottle is applied as screen print to ensure that the quality feel is never degraded through its busy life in the world's top bars.



## The Website

The brand identity, tone of voice and graphic style have been taken directly into our design for the No. 3 website (www.No3gin.com) to ensure the story is consistently told.



(Word count 449)



# SUMMARY OF RESULTS

## *Sales*

Sales in the first 12 months have hit 10,800 cases – 62% higher than the target of 6,700.

Spain has been the main market with sales outstripping targets by 160%

## *Profit*

As the brand is achieving super-premium price points (at up to 45% above the category leader Hendricks and the benchmark brand Tanqueray 10) and above target volumes they are achieving gross profits over and above budgets, allowing them to invest more into further growth of the brand.

## *Return on Investment*

With a profit margin of c. 60% and given the level to which the sales have outstripped the original budget, the design fee will have been paid back within 3 months. This is earlier than anticipated.

## *Market Share*

Even at this early stage of the life of No. 3 an 4.25% market share has been achieved.

## *Distribution*

Creating successful sales for the on-trade is a 2 phase process; you first need to appeal to bar owners, to get the bar listings, and then, in turn, to consumers through visual, on shelf presence. The packaging for No. 3 London Dry Gin has proved extremely successful on both counts. As the UK example shows with nationwide wholesale coverage and over 750 bar listings in the first 12 months with many adding the brand to cocktail menus and placing the bottle prominently on back bar displays, proving that it is just as popular to gin lovers. In Spain the rate of distribution growth has been even faster.

*“3 is the magic number for a Dry Martini.*

*3 steps: vermouth,*

*No.3 and a twist of lemon.*

*Simple, elegant, memorable”*

*Alessandro Palazzi, Bar Manager, Duke’s Hotel, St James’s, London*

The first 3 launch countries were planned as the UK, Spain and USA – however significant interest in 10 other countries (Canada, Australia, Russia, Hong Kong, Scandinavia, France, Switzerland, Andorra, South Africa and Germany) means that distribution has been significantly higher than planned or anticipated for such a new to market and super-premium brand.

In addition, due to its success and appeal, the move to retail has come very early with No. 3 London Dry Gin having been listed in London's top 30 Waitrose stores from July 2011. This listing has been put down almost exclusively to the premium appeal of the packaging; both the look and the feel of the box, the wrap and the bottle speak of the quality of the product within.

## Awards

It is almost easier to list the awards that the brand hasn't won, but here are a few:

- Best Overall Product, Harpers Design Awards 2011
- Best White Spirit, Harpers Design Awards 2011
- Winner Design & Packaging at FAB Awards 2011

So both the product and its packaging alike are winning plaudits all around the world.

## PR

*"The judges were unanimous in singling out Berry Bros & Rudd's first venture into traditional London gin as its standout brand.*

*The care, craft and attention to detail that has gone into the gin has been matched by the bottle and packaging. The key concept has been brilliantly thought through at every stage of the brand's development right through to its website."*

*Harpers Design Awards 2011*



# OTHER INFLUENCING FACTORS

## Sales Force

The influence of the sales force should not be forgotten; but this is the same team of experts that have been responsible for the sales of Berry Bros & Rudd's other brands and they themselves have stated how easy the brand and the packaging make this gin to sell into discerning bar owners across the world.

*"No.3 London Dry Gin is a fantastic addition to our portfolio because it focuses on tradition rather than 'neo-tradition'. We have received consistently positive feedback about the design and its impact on ensuring standout in a very crowded market".*

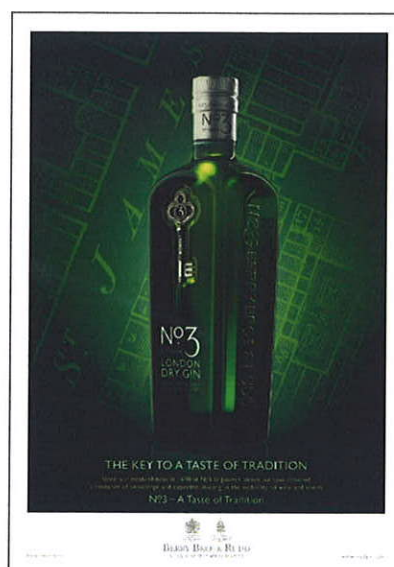
*Luke Tegner, Brands Director, BB&R*

## Brand Ambassadors

Our experts who consulted on this project have become ambassadors, even evangelists for No.3 London Dry Gin. This has meant that the brand has had very good press amongst the cognoscenti – but his effect does not really extend as far as the bar goers selecting the gin they would like in their cocktails.

## Advertising

Other than placement in a limited number of specialist magazines, the brand has not received any significant consumer-facing advertising support. Indeed, the brand identity and design is so strong that the limited advertising is distinctive rather than necessarily differentiating.



# RESEARCH RESOURCES

IWSR

Harpers Wine and Spirit

JustDrinks.com

Berry Bros & Rudd