



elmwood

DryNites®
Home and dry

Category
4 Packaging

Sub Category
4.3 Branded – other

Client
Kimberly-Clark

Design Consultancy
Elmwood

Date
June 2012



2. Executive summary

DryNites®



After: DryNites®

10%

value sales increase in the UK
DryNites® biggest market



Before: DryNites®

DryNites® Pyjama Pants are designed to help Mums and children manage the bedwetting phase. The key challenge facing the business was low awareness of the brand proposition especially amongst Mums and younger children. The task was to make it clear that DryNites® Pyjama Pants are a night-time product, attract parents with children aged 3-5, and also differentiate the range for parents of 4-7 year olds and 8-15 year olds. It was important to normalise the products and create brand trust too.

The overall aims were to recruit new users at the 3-5 years point, increase market share, expand the brand's relevance and in doing so impact on the main competitor (Pampers UnderJams).

Following the re-design, the DryNites® brand is delivering double digit growth across Europe and driving both category and market share gains.

Value sales of DryNites® in France has increased by **6%**. In the newest market Germany there has been a **+53%** increase. Value sales in the UK which is DryNites® biggest market have increased by 10%. With new market Poland a whopping **+210%** increase in value sales YTD June 2012 vs. the same period last year.

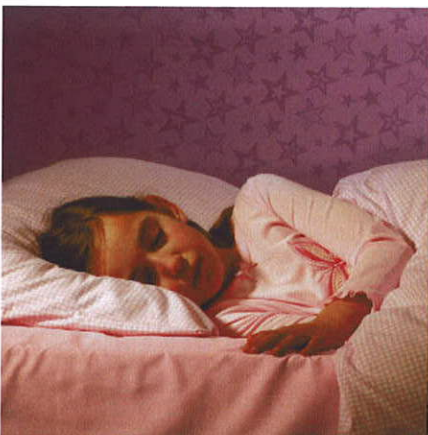
In addition, the DryNites® brand has been able to increase brand penetration amongst the younger age group and increase share of shelf in key markets and within key customers, **further strengthening the leadership position in the category.**

3. Project overview

DryNites®



Before: Bright images of children awake and smiling doesn't communicate night time



After: Duskier images of children asleep and peaceful clearly communicates night time cues

Outline of brief

The *DryNites*® brand is dedicated to providing products specifically designed to help Mums and children manage the bedwetting phase. Bedwetting can be challenging and emotional issue for both children and parents, and can affect children right up to the age of 15.

Already an existing brand, there was low awareness of the brand's proposition among non-users. Parents were quick to dismiss *DryNites*® ' product range in store as 'not for me' because the packaging looked like another training pant product for toddlers, and was packaged like nappies. Mums weren't considering *DryNites*® during their re-appraisal stage when the child was dry during the day but still tended to wet the bed during the night.

The opportunity was to attract parents with younger children to increase penetration, and recruit parents into the *DryNites*® brand. To do this, the following barriers, perceived by Mums, needed to be addressed: the existing products looked too nappy-like, which added to the child's embarrassment, and some Mums believed it prolonged the bedwetting problem (*DryNites*® U&A, UK, July 2007). Having identified the opportunity, initial research concluded that the current pack design was incapable of supporting these requirements (State of Play 9th August 2010).

The initial brief was to design packaging for a new 3-5 year-old recruitment product that better met the needs of both parent and child. It had to provide a clear promise of emotional support (it was different to nappies) and one of functionality (superior absorbency and girl/boy differentiation). It also needed to communicate 'the next stage of the journey', treat the stage as normal and natural, and appeal to parents by focusing on the child's independence.

Quantitative research showed a strong positive response to the 3-5 year product design, revealing the need for a more age-appropriate range. The brief was then reappraised and we were asked to design SKUs for all age ranges, i.e. 4-7 and 8-15 year olds as well as 3-5 year olds.

Specific marketing objectives were to:

1. Recruit new users at point of market entry (3-5 year olds)
2. Increase market share and impact the competition's performance
3. Expand the brand's relevance in 2012/3 to include and accommodate product specification changes and redesigns of the bed mat range.

3. Project overview continued

DryNites®



Children happy to be bedwetting?

Description

DryNites® is a brand dedicated to providing products to help parents and children manage the bedwetting phase. This range consists of Pyjama Pants (previously in sizes 4-7 years and 8-15 years, for both girls and boys, but now with the extra size of 3-5 years) and bed mats.

Overview of market

25% of four year-olds wet the bed, but bedwetting can happen up to the ages of 14 and 15. Within the four year-old age group, DryNites®' penetration was low at just 8% in the UK (DryNites® U&A, UK, July 2007).

The main competition is from Pampers UnderJams and also own-label in mainland Europe.



Before: Packaged like nappies

Project launch date

January 2012, UK & Europe

Size of design budget

£52,500 + £30,400 photography and illustration

Outline of design solution

Our job was to redesign the entire Pyjama Pant range – SKUs for children aged 3-5, 4-7 and 8-15. The designs had to provide a clear promise of emotional support (i.e. not nappies) and one of functionality (superior absorbency and girl/boy differentiation). It also needed to communicate 'the next stage of the journey', treat the stage as normal and natural, and appeal to parents by focusing on the child's independence.



After: Drawstring packs

Extras

The packaging format was a full-printed glossy poly bag. This communicated nappy cues and rooted the product in nappy products. It was vital to move DryNites® away from nappy and training pant territory, so we changed the format to a drawstring bag. This moved it into the pyjamas/nightwear and underwear territories, which helped normalise the products.

3. Project overview continued

DryNites®



DryNites® brand mark

A new matt substrate with a reassuringly dry feel helped communicate the superior absorbency qualities, and increased shelf standout. The previous glossy bag, in contrast, made the product look moist and wet – obviously the wrong message to send out. The removal of the *Huggies* endorser brand further distanced *DryNites*® from the nappy category, allowing *DryNites*® to have greater brand strength itself.

A night-time focus

We wanted to position *DryNites*® as a night-time protection brand that parents can trust, and that their children are happy to wear. The new design focuses on comfort rather than happiness, as the previous images of smiling children felt inappropriate to the issue of bedwetting. Instead, we used shots of children in comfortable, peaceful sleeping poses, and placed the child in the centre of the pack to really get across the 'good night's sleep' proposition.



We also strengthened the brand mark and updated the brand palette from a royal blue to a graduation of darker blues, which added more weight to the night-time proposition.



Age and size icons

Finding the right product

Again, taking our cues from underwear rather than nappies, we developed clear age and size icons to act as range signposts. The strong accent colours made the age communication much clearer to see on shelves at the repeat purchase stage. The clearer signposting also helps remove a lot of the embarrassment associated with shopping this fixture, making it easier and quicker to find the right age.

Remember the child!

It was essential to get the parents interested, but children were also important. We used the pack's background as a canvas to display 'wallpaper' with age-appropriate imagery, i.e. dinosaurs for little boys and fairies for little girls for example), and carried these onto the pants designs themselves.



Fairies and dinosaur 'wallpaper'

The all-important promise

The Sleep Protection promise icon was an important part of the design and message. We placed it centrally on the packs. The end result is that you see the sleeping child first, then the Sleep Protection icon, and then the brand – in that order. This provided the reason to believe that *DryNites*® specially designed to give children the best protection right through the night.

4. Summary of results

DryNites®

Results

Double digit growth has been achieved in every European market and *DryNites*® has contributed more to category growth in all countries.

Age/Product specific

In countries where the 3-5 SKU has been launched *DryNites*® YTD growth is ahead of the category growth, with the 3-5 SKU representing **+70%** of that growth. In Spain alone one key account has seen a 7.3% increase. (Nielsen 2012, Launch of *DryNites*® 3-5yrs).

In France, where *DryNites*® 3-5yrs SKU is listed, e.g. in Auchan, it outsells Pampers UnderJams (Nielsen 2012, Launch of *DryNites*® 3-5yrs).

Mature markets

In the UK *DryNites*®' biggest, most mature market, there's been a **+10%** value sales increase YTD June 2012 vs. the same period last year.

In addition, *DryNites*® Pyjama Pants is gaining share of shelf and in some customers will achieve solus status in 2H 2012 **reinforcing the brand and category leadership position.**

DryNites® has seen an increase in its shopper base, with penetration of households with children aged between 3-5 moving from 6% to 9% (Kantar Worldpanel, 52 w/e data to 13th May 2012).

In France *DryNites*® is the market leader with **84% of the market.**

4. Summary of results

DryNites®

+210%

sales value increase in Poland

'DryNites is now in very good shape, and is delivering excellent growth.'

Clare Prego,
European Brand Manager,
DryNites®

New markets

In Germany, the newest growth market, value sales have doubled **+53%**, with no above-the-line support. There has also been a 7% increase in market share, from 65% to 72% (Nielsen Scantrack, WE 13.12), taking share directly away from Pampers UnderJams.

Equally in Poland the value sales has increased by a whopping **+210%**.

DryNites® specific marketing objectives:

The company's three main objectives, which have all been achieved – as shown in the results above.

1. Recruit new users at point of market entry

Where this 3-5 years SKU has been launched, we've attracted more new consumers buying this age range. Spain and France have seen particularly great results.

2. Increase market share and impact main competitor (Pampers UnderJams)

With double-digit growth in every European market, DryNites® is now seen as the strong brand and category leader. DryNites® has made share of shelf gains and will have solus status in some customers. Sainsbury's have delisted Pampers UnderJams from all its stores. In France DryNites® outsells Pampers UnderJams with sales increased by 6% whilst UnderJams have decreased by 42%.

3. Expand the brand's relevance in 2012/3 to include product specification changes and redesign of bed mat range

The success of this redesign has meant we've now completed the redesign of the bed mats.

'DryNites® is now in very good shape, and is delivering excellent growth'

Clare Prego, European Brand Manager, DryNites®

5. Other influencing factors

DryNites®

Other influencing factors

Advertising

UK media spend was consistent year on year.

Promotions

In the UK actually 3% less sold on deal.

Research resources

DryNites® U&A, UK, July 2007

Kantar Worldpanel, 52 w/e data to 13th May 2012

Nielsen Scantrack, WE 13.12

Nielsen 2012, Launch of DyNites 3-5yrs

State of Play 9th August 2010

