

DRAGON ROUGE

**DBA Design Effectiveness
Awards 2017**

**Feel good, look good:
How Light & Free broke the
rules of the diet category**

Category:
Yogurt / Dairy

Client:
Danone

Design Consultancy:
Dragon Rouge

*Light
& Free*



Executive summary



A bold new presence in the yogurt chiller for health-conscious adults

Danone are on a mission to bring “health through food” to as many people as possible, but while brands like Activia and Actimel had traditionally performed well with older female consumers, Danone under-indexed with younger women.

In 2015, Danone identified the opportunity to create a healthy, but rewarding yogurt, which would delight consumers who’d become accustomed to the lowered eating expectations of low-calorie yogurt. The new brand would offer truly great-tasting Greek-style yogurt with real fruit pieces. It would be big on taste and satiety, but with 30% fewer calories, zero fat and no added naturally occurring sugar.

But in order to connect with younger, health-conscious women, the new brand would need to respond to changing attitudes towards health and wellbeing, breaking away from the classically reductive visual and verbal vernacular of the ‘diet’ yogurt category to create a lifestyle brand for millennial consumers.

With the opportunity defined, Danone appointed Dragon Rouge London to help create the new brand: *Light & Free*

Building on the upbeat, carefree name and the key ‘big taste and pleasure’ selling points of the product, we set about creating a joyful, dynamic and stylish look and feel, designed to achieve a distinctive presence in the yogurt chiller that gleefully subverted diet category norms.

Our ambitious and audacious new brand cut through the crowded shelf achieving some incredible results:

The biggest innovation in UK dairy 2016, closing the year at

(Source: Kantar Media)

£23m

30%

above sales forecast within first five months

(Source: Danone)

Biggest

brand launch in 2016

(Source: Kantar Media)

Highest

penetration of all yogurt innovations for the past 4 years

(Source: Kantar Media)

Project overview

Outline of Project Brief

Danone were in a strong position in the UK with established brands like Actimel and Activia appealing to health-conscious consumers, and Danio and Oykos offering big taste and luxury.

Danone approached Dragon Rouge to help create a brand that would break free from the norms of the diet category, and resonate with a whole new audience.

At the outset of the project, Danone wanted to:

Create a distinctive new presence in the yogurt chiller

Clearly communicate the USP (0% fat and 0% added sugar)

Break free from visual diet category norms

Appeal to a new demographic (young, female, aged 25 - 44)



Description

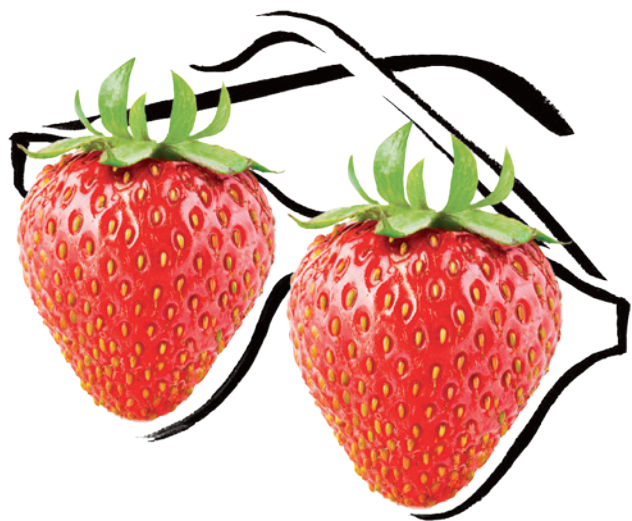
For almost 100 years, Danone has sought to bring fresh dairy products to people around the world. Their ambition is rooted in the firm belief that these products are not only enjoyable to eat, but contain nutrients that are important to good health.

However, having established health and wellbeing brands like Actimel and Activia, Danone found that they over-indexed with middle-aged and older women, and hardly resonated with younger women at all.

In the wake of the government's 'Action on Sugar' initiative, there was a growing concern surrounding sugar and artificial sweeteners among consumers. With shoppers increasingly aware of their sugar intake, Danone believed there was a gap in the market for a mainstream yogurt that would appeal to women aged 25 - 44 who were looking at ways to positively and actively manage their weight.

(Source: Nielsen Global Survey of Health and Wellness)

This new brand would offer truly great tasting Greek style yogurt with real fruit pieces; big on **taste, pleasure** and **satiety** but with 30% fewer calories, zero fat and no added, only naturally-occurring sugar. The offer was aimed squarely at the younger health-conscious consumer with whom Danone had previously under-indexed.





Overview of market

The UK yogurt market is crowded with brands by prestigious dairy companies including Yoplait, Müller, Yeo Valley, Nestlé, and of course Danone itself, as well as own label offers.

Weight management is a huge part of the yogurt category, accounting for a third of all yogurt sales. But weight management products have been on the decline in recent years, with 2015 research from Nielsen finding that “diet” or “light” products that used artificial sweeteners had fallen by 12% globally over a two year period.

Much of this decline can be attributed to the changing attitudes towards diet and health, particularly among millennials. Emotional as well as physical benefits have become the primary drivers behind consumers’ desire for a healthy lifestyle with 44% of 16-24s saying they eat healthily to make them feel good, as well as look good.

(Source: Danone research)

Consumers have moved away from “reactive” weight management (diets, calorie counting etc.) towards more sustainable, active, healthy lifestyles, supported by natural foods that promote good health. Sugar, salt and artificial flavours / colours are some of the biggest factors in food purchase decisions, and “naturalness” is a must for health-conscious consumers. But while health is an essential part of the millennial lifestyle, millennials are unwilling to sacrifice pleasure in order to be healthy and this can be seen in their rejection of traditional dieting brands.

(Source: Nielsen - We are what we eat, January 2015)

The yogurt category, has been slow to respond to this shift in attitudes; too often relying on imagery and messaging that focuses on weight-loss and fitting into smaller dresses. This may account for decline in yogurt sales among millennial consumers; in fact, only half of millennials who want to “look good and feel good” regularly buy yogurt today. (Source: Danone) In the US, traditionally a trend-setter in this sector, light yogurt has been particularly hard hit, with sales falling 8.5% in 2016, dropping \$200 million from roughly \$1.2 billion to \$1 billion, according to Nielsen data.

(Source: Nielsen / Business Insider September 2016)

Danone had established health and wellbeing brands like Actimel and Activia, but their own research had shown that these “functional” brands had lost any real sense of enjoyment or pleasure, also scoring poorly on “naturalness” with survey participants. Danone recognised the opportunity for a mainstream entrant in the market, with a brand that could respond to the shift in attitudes towards health and wellbeing.

Despite the challenges facing the sector, Greek and Greek-style yogurt has been bucking the trend, now making up 31% of Brits’ annual £7.1bn spend on yogurt. Greek and Greek-style both live in the consumer ‘sweet spot’; delivering on satiating pleasure, while also having healthy ‘permission’ and a justifiable premium. The 0% Greek sector also managed to deliver on the key Greek benefits - thickness and taste - without compromise, allowing consumers to ‘have their cake and eat it’.

(Source: Kantar Worldpanel 52 w/e, 4 Jan 16)

If Danone could crack this millennial market, there was incredible potential for growth. The challenge would be to communicate Light & Free’s nutritional benefits on pack, without falling back on the tired visual codes of “diet” products.

Size of design budget: £62k

Project launch date: April 18th 2016

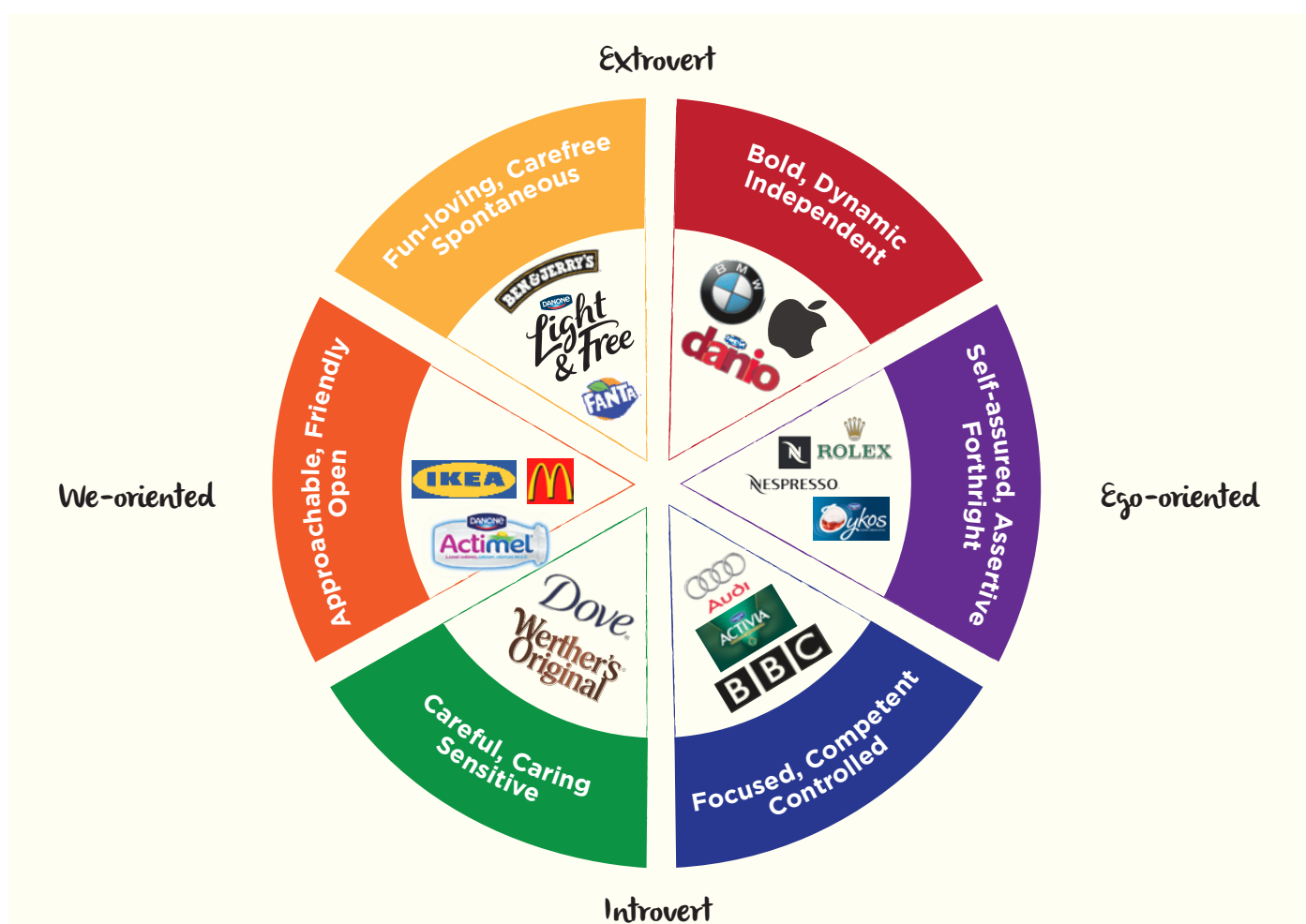
Outline of design solution

With traditional diet products on the decline, a major objective for the visual identity was not just to stand out from the pack, but to signal a paradigm shift in the yogurt category.

For millennials immersed in “clean eating” bloggers and foodie Instagram feeds, food is no longer just a means of sustenance; it’s a form of expression. We needed to create a brand that looked beyond the usual confines of the yogurt category, and took inspiration from outside sources that spoke directly to millennial women.

Exploring one of the key insights that Danone had discovered in their research - the desire to ‘feel good and look good’ - the design borrowed cues from fashion and young women’s lifestyles to make a bold statement in the chiller cabinet. We built upon the *upbeat, carefree* name of the product, and the key ‘big taste and pleasure’ selling points to create a brand that was more focused on what it was than what it wasn’t.

We set about creating a joyful, dynamic and stylish look and feel. In a starter range of five enticing fruit flavours, we designed 4-pack sleeve designs featuring light-hearted, hand-crafted black line drawings of stylish young women ‘wearing’ fruit dresses, each with a fun flavour name.



In designing Light & Free, Danone envisaged the colour coded brand wheel above - Light & Free was to sit firmly in the “yellow” segment of the wheel

Outline of design solution



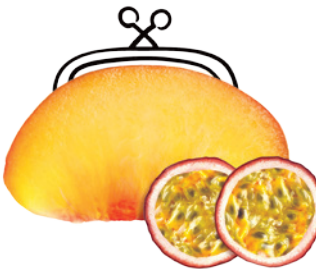
The design was a dramatic shift away from the norms of the diet category; light blues and pastel shades, swirls of yogurt on spoons etc. Instead we adopted an approach that was more emotional and stylish, allowing the consumer to imagine the kind of yogurt they would discover inside the pot.

The inner pots are adorned with hand-drawn lifestyle-oriented accessories, complemented by real fruit imagery to add appetite appeal, colour and a touch of humour. The healthy reassurance is then provided by clear 0% symbols.

Light & Free provided consumers with a no added sugar, no fat, low-calorie alternative that could fit their lifestyle choices and convey positively healthy cues. The Light & Free design presented them with a dynamic and exuberant look-and-feel that was a much needed breath of fresh air in a stagnating category.



Summary of results



After just 12 weeks, Light & Free had already torn up the rulebook and shattered expectations.



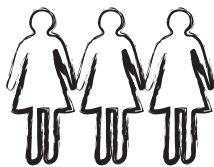
£15.5m

Value sales since launch



1.3%

YTD Shared CYD



13.7%

Household penetration



37.2%

Repeat rate

Results for Light & Free after 12 weeks

For Danone, their sky-high ambitions for Light & Free paid off, achieving some staggering results:

Light & Free was the biggest innovation in UK dairy in 2016, closing the year at £23m after launching in April.

(Source: Kantar Worldpanel, 4th December 2016)

Sales 30% above forecast within first five months.

(Source: Danone)

Biggest contributor to growth in CYPD (chilled yogurts & pot desserts).

(Source: Kantar Worldpanel, 4th December 2016)

Highest penetration of all yogurt innovations for the past 4 years.

(Source: Kantar Worldpanel, 4th December 2016)

Top 5 New Brand Launches:

Based on take home sales to 1st January 2017

Sales Rank	Brand	Sales in £m	Product first seen
1	Danone Light & Free	£18.4	22/05/16
2	Arla Best of Both	£16.6	31/01/16
3	Gillette Fusion Proshield	£16.1	28/02/16
4	Walkers Tear 'n' Share	£16.0	31/01/16
5	Lucozade Zero	£13.6	22/05/16

(Kantar Worldpanel)

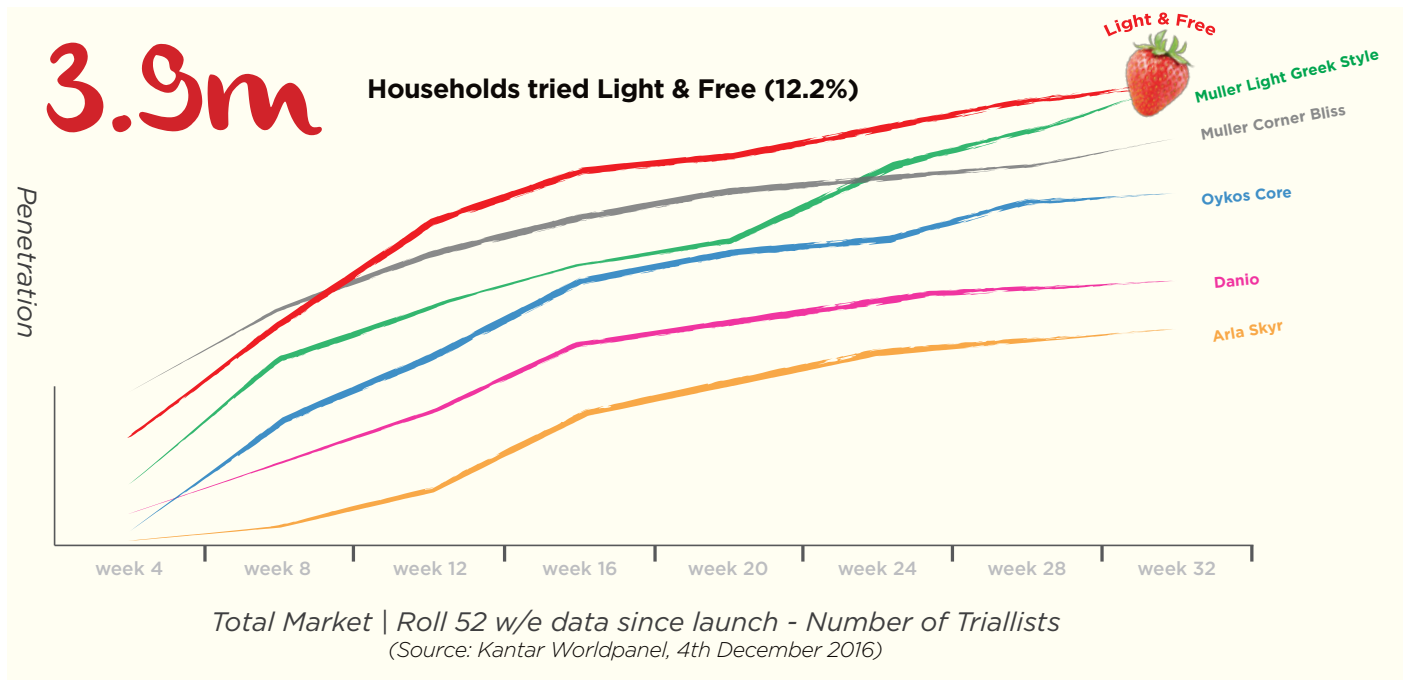
“Product first seen” is not official date that L&F was available in supermarkets



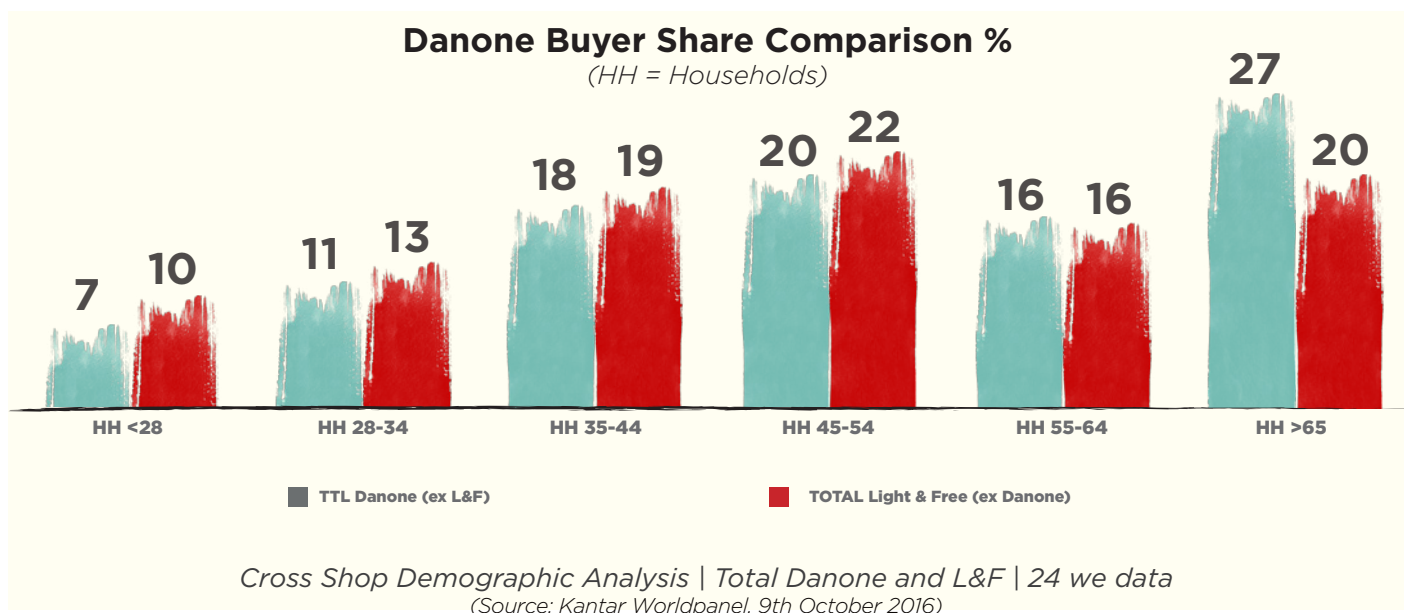
Summary of results



Light & Free rose to the challenges of a fiercely competitive market, with an incredible 3.9m households trying the brand after 32 weeks.



Our fresh and playful new look has clearly resonated with our target audience, and is already helping Danone to reach younger women.



Other influencing factors

Research has shown that in this sector, 80% of purchase decisions are made on the shelf.

So while there were supporting media and advertising campaigns for Light & Free, we knew from the outset that the packaging was the primary promotional vehicle. The design work was central to the high-level brand building that helped Danone create a lifestyle brand with Light & Free.



Dragon Rouge's innovative design for Light & Free was central to the look and feel of a media launch campaign including TV, digital and OOH advertising.

Though the launch was supported by above-the-line ad campaign, this campaign began five weeks after the product first hit shelves.

Key sales milestones were achieved far ahead of the media plan (see pg8: results after 12 weeks)

- 60" OLV on Facebook and Youtube (1.5m views)
 - 30" TV ad
 - 3 weeks May
 - 2 weeks June
 - 3 weeks September
 - 2 weeks October
 - 3 weeks February 2017
 - 2 weeks March 2017
- 3.24m views



Comparison: Oykos

A useful point of comparison is another Danone brand with design work by Dragon Rouge: Oykos. Arriving in the UK in 2012, Oykos was Danone's first big launch for over a decade and was created to meet the demand for a tastier, more filling yogurt.

With a similar design budget and media spend as Light & Free, Oykos achieved a 0.6% value share of market at 12 weeks compared to Light & Free's 1.3% share in the same timeframe.

Research sources

We are what we eat: Healthy eating trends around the world

Source: Nielsen - January 2015

Kantar TNS unveils first ranking of growth potential in snacks (Press release)

Source: Kantar US - June 2015

Kanta Worldpanel grocery share data

Source: Kanta - January 16

Attitudes towards healthy eating - UK

Source: Mintel - February 2016

One of the most popular beverages in America is becoming extinct

Source: Business Insider via Beverage Digest - June 2016

“We really wanted to introduce a new lifestyle brand in a disruptive way and the success of Light & Free has proven that we were right to pursue this.”

Francois Brugiere

Senior Brand Manager, Danone UK

Healthy eating is increasingly on consumer's agendas, with millennials leading the way

Source: PWC - August 2016

Yogurt and sour milk products in the UK

Source: Euromonitor International - September 2016

Kantar Worldpanel Grocery Share Data

Source: Kantar - December 2016

Attitudes towards Healthy Eating - UK - What You Need to Know

Source: The Consumer - February 2017

Focus on Yogurts 2016

Source: The Grocer - April 2016

Action on Sugar

Source: www.actiononsugar.org

Danone in-house research

Source: Supplied by client

