

Sainsbury's

SO  
ORGANiC



## REPOSITIONING AND REDESIGN OF SO ORGANIC

FOR PUBLICATION

SAINSBURY'S

DBA DESIGN EFFECTIVENESS AWARDS ENTRY

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BrandMe

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# EXECUTIVE SUMMARY

This project concerns the strategic repositioning and redesign of SO Organic, Sainsbury's private label range of organic products which stretches across 230 skus and across all food and drinks categories. Prior to the redesign, SO Organic was losing market share and underperforming, notably with slow growth of 2.8%, versus an average of 5.3% for multiple competitors (source: Sainsbury's).

Sainsbury's research also showed that SO Organic underperformed with young consumers and the 'Organic' name component lacked visibility, whilst consumers had a poor understanding of the benefits that organic products deliver.

## THE PROJECT OBJECTIVES WERE TO

- Halt and revert the decline in market share and grow the brand.
- Clarify what SO Organic stands for, to better communicate to consumers the brand purpose, as well as the Organic benefits.
- Create a positioning that would broaden the target audience and make the brand more permissible and accessible every day for everybody (move away from a premium polished proposition).
- Recruit young organic consumers.

## THE RESULT SAW

- A reversal of SO Organic's declining market share to +2% value share growth of the £1.105 billion supermarket Organic market, (65% of the total UK organic market according to the Soil Association 2019 figures) worth £1.7billion (source: Nielsen EPOS 52wks to wk22 2019-2020).
- SO Organic has grown 4% ahead of the other Sainsbury's own brands following the rebranding.
- +27% purchase intent (Sainsbury's consumer research) versus multiple retailers' private labels (indexed against market average).
- Intention purchase which over indexed against young organic buyers translated into the recruitment of 37,290 new and pre-family households (source: Nielsen panel).



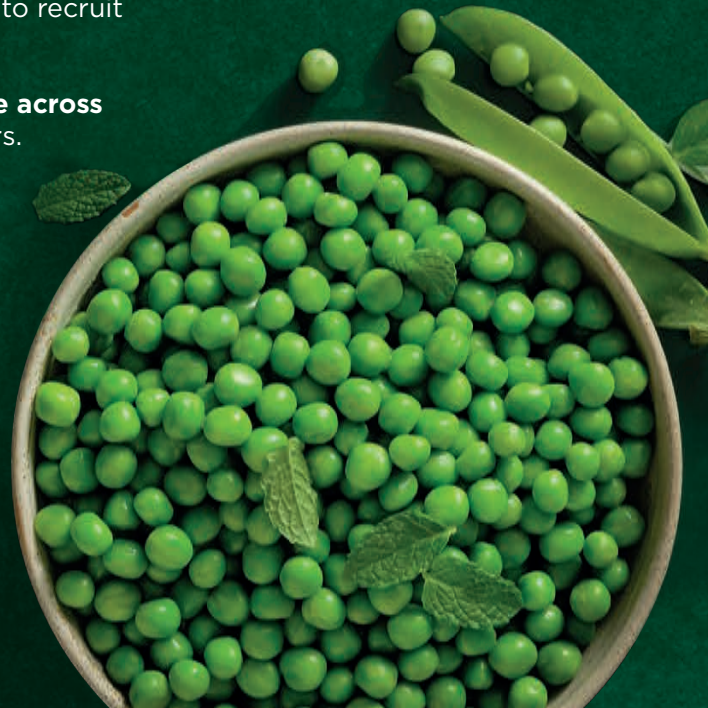
## CONTEXT AND OVERVIEW

### OUR BRIEF AND SCOPE OF WORK

We were briefed to reposition and redesign SO Organic in a bid to **halt declining market share (-1.5% value share)** and grow both market share and the brand.

Although SO Organic existed as a brand, we were asked to carry out a **strategic exercise to clarify what it stood for and to make the range more accessible for everyone**; this included the key brand principles, its personality and tone of voice. The new strategic positioning was to **highlight the brand purpose and act as a recruiting platform for a broader consumer base, with a particular focus on the recruitment of young consumers** - a challenging audience who are notoriously difficult to recruit but sensitive to design.

The **umbrella also had to work harder at point of sale across a host of categories** with very diverse branded players.



# DESCRIPTION

## THE SO ORGANIC BRAND AND MARKET BACKGROUND

Pre-redesign, Sainsbury's accounted for 22% of the UK organic multiple grocery market (source: Kantar Grocery w/e 11th August 2019). The UK Organic market is worth £1.7 billion (**source: Nielsen EPOS 52wks to wk22 2019- 2020**) and SO Organic is the largest organic brand in the UK.



However, in this context **SO Organic was lagging behind in most categories achieving a sluggish 2.8% growth, against a backdrop of multiple retail competitors who achieved an average increase of 5.3% year on year** for the same period (source: Sainsbury's).

## CHALLENGING MARKET CONDITIONS

**Growth of online, locally produced and specialist independent markets.**

Even pre-Covid the organic market faced strong threats from the **online home delivery market which was expected to rise by 25% by 2023** (source: Sainsbury's). The impact of the various lockdowns and food shortages has accelerated this trend, profoundly shifting behavioural shopping patterns to online. Specifically, the online organic box delivery market, as well as the pre-prepared boxed recipe solutions, have seen a proliferation of new organic brands with communications support. Covid also created a trend towards **more sales from local farm shops and other more specialist local high street independents.**

## THE TARGET AUDIENCE

Research shows that the **benefits of organic are not understood** with any depth or grounded in relevant facts - centred mostly around natural, free from chemicals and healthy - making organic choices harder to justify across multiple segments.

As a result, **organic shoppers are not loyal across categories;** they are more likely to buy organic in certain categories than others or purchase different brands in different segments. This, added to the **challenge of building a successful umbrella brand** that has impact and resonates across multiple categories.



BEFORE



AFTER

## THE SOLUTION

We developed SO Organic's positioning as a range of organic, sustainably-sourced food that is grown **'in harmony with nature'**, targeting eco-conscious consumers who want naturally good food that is better for the environment; naturally better food, better for the planet. The strapline 'in harmony with nature' now features on all

packs and acted as the starting point for a naturally bright and fresh new livery. The new design communicates the benefits of products that are picked at their peak of ripeness for vibrant taste and nutrition. With nothing to hide, the brand has a real, down to earth, honest personality that conveys a sunny and optimistic character.

“EVERYDAY FOR EVERYONE”

The previous pack design looked crafted, pure and premium but appeared more perfect, niche and expensive. It was less approachable and the 'SO Organic' brand mark was also recessive. The natural, sunny new brand mark which punches out of the green pack **achieves greater visibility in a fragmented market** where small individual brands often display bright, self-expressive personalities.

The new SO Organic feels sunny, warm, natural, inviting and real. It is more democratic and **moves the brand image to a more 'everyday for everyone' permissible proposition. Standout and memorable for repeat purchase across categories.** The new confident identity works harder to stand out across all categories; it acts as a shortcut to grab consumers' attention fast and be memorable.

## KEY FACTS

The brand was launched in September 2020, during the same general Organic September campaign that Sainsbury's run every year, **but without any bespoke brand advertising, promotions or POS specific to SO Organic.**

**The effect of Covid was to increase competition as it accelerated an already fast-growing online organic market and created a trend towards more sales from local farm shops and other specialist local high street independents.**

The project design budget was £91,000.



# RESULTS

## RECAP OF OBJECTIVES/KPIS

- Halt and revert SO Organic's decline in market share and grow the brand.
- Clarify what SO Organic stands for, to better communicate to consumers the brand purpose, as well as the organic benefits.
- Create a positioning that would broaden the target audience and make the brand more permissible and accessible every day for everybody (move away from a premium polished proposition).
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## QUANTIFIED RESULTS

- Sainsbury's consumer research shows that the new design broadens appeal, **significantly over indexing** across all KPIs with a tough-to-get **younger 'organic' customer and less frequent current organic buyers**.
- **Reversed their negative value share decline to extend their lead and grow their market share by 2%** over the rest of the multiple retail organic market.
- **SO Organic has grown 4% ahead of the other Sainsbury's own brands following the rebranding.**
- **Sainsbury's captured 31% of overall multiple share** (Source: Nielsen Panel 52 w/e to P9 2020-2021).
- The new design delivered **+27% purchase intent** (indexed against market average) versus its multiple competitors.
- Recruitment of 37,290 new and pre-family households (source: Nielsen panel).





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