Plant-powered drinks served up by nature

Client: Plenish | Studio: Magpie Studio
DBA Design Effectiveness Awards entry
— November 2023

Magpie Studio

EXECUTIVE SUMMARY

Plenish is a drinks brand producing high quality, organic non-dairy milks, juices and juice shots. Their big selling point is the natural purity of their ingredients, using only 3-4 high quality ingredients per product, no additives, oils or gums in sight.

One of the original functional health challenger brands in grocery, Plenish were losing sales and market share to competitors appealing to a more taste-driven consumer. The problem was, the brand identity wasn't delicious enough to keep up with the competition.

This case study tells the story of a radical reposition. How pivoting to a new consumer audience, evolving brand equities and building stronger, more relevant associations has significantly increased market share. How taking the risk on a rebrand can pay dividends – when it's done strategically to move with the market.

ACHIEVEMENTS TO DATE

- Plenish has become the fastest growing premium dairy alternative in the total UK market, growing by 64.4%, raising sales by [REDACTED CONFIDENTIAL DATA] in a contracting market.
- They've significantly increased their market penetration of the dairy alternative market, moving from the [REDACTED CONFIDENTIAL DAT] biggest player in the [REDACTED CONFIDENTIAL DATA] largest.
- Plenish has also become the fastest growing juice shots brand in the total UK market, growing by 128%, raising sales by [REDACTED CONFIDENTIAL DATA]*.
- Plenish products are now stocked in [REDACTED CONFIDENTIAL DATA] across the UK, an increase of 57% since the rebrand.

*Plenish value sales difference MAT TY vs MAT YA

Plenish

RANGE BEFORE

RANGE AFTER

Background: Plenish and the rise of functional drinks

Plenish is a plant-based pioneer that's dedicated the last decade to the pursuit of crafting drinks with pure, untampered ingredients. Since launching the UK's first cold-pressed juice range back in 2012, they expanded into plant-based milks in 2016 and juices shots in 2020.

Back in 2012, the category drivers were clear: meeting medical needs (food intolerances) and embracing a healthier lifestyle, which included switching to 'functional foods' with an improved nutritional profile.

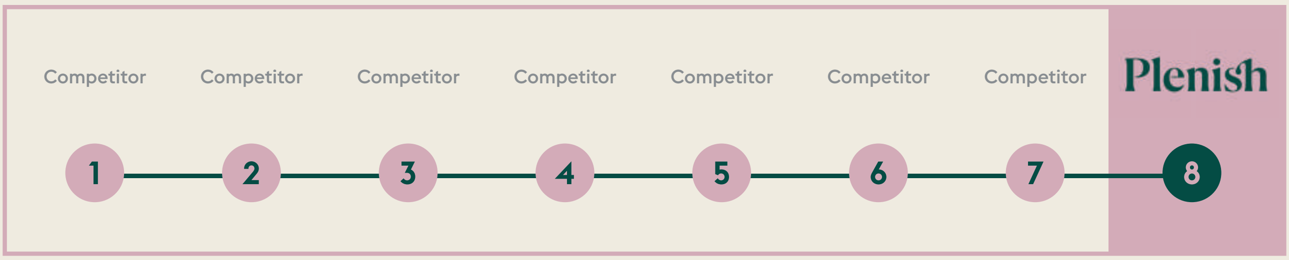
With strong functional and clinical cues, the original brand helped propel the brand to category leader status with knowledgeable, ultra health-conscious consumers.

The Challenge: navigating an evolving market

By 2021, the market for dairy alternatives had grown significantly: the plant-based milk market was worth 430M[1], with projected growth of 50.2% over 2023-28 to reach £925 million.[2] This represents growth of 42.3% at 2023 prices. The juice market was beginning to pick up again after a dip in revenues, with a projected CAGR of 3.1%.[3]

While juice growth is considerably slower than the dairy alternatives, both show that consumer behaviour is changing, embracing healthier choices as part of a broader shift in lifestyle. However, Plenish was no longer the category leader, particularly in the dairy alternative category.

[4]



According to Mintel "In 2020, nearly half of total dairy-alternative category consumption was motivated by personal or household allergies and intolerances. In 2021, this motivator moved down to the No. 5 position, overtaken by purchase motivators related to health perceptions, variety and general plant-based eating aspirations." [5]

Juices and dairy alternatives are no longer functional health products – they're now aspirational, status-signalling choices. And consumers want them to taste good. Plenish's brand equities did not communicate that. Even brand loyalists admitted that the brand came across as 'clinical' and 'unfoodie'.[6]

They were missing out on a massive opportunity.

CONTEXT & OVERVIEW

The Key Objectives:

The client refined a new strategic proposition – Less is Moreish – to present the brand as a superior alternative to foodie consumers of dairy alternatives and juices. After validating this strategic position through qualitative research, they commissioned a rebrand to activate it, measured by the following objectives:

1. **Increase the perception of Plenish as a 'delicious' 'foodie' brand that's worth paying more for among taste-driven consumers**
2. **Increase Plenish Dairy Alternatives value sales by 50% by March 2023**
3. **Increase Plenish Juice shots value sales by 100% by March 2023**
4. **Increase Plenish Dairy Alternatives Distribution by 20% by March 2023**

The Scope of Work:

Our brief was to evolve their visual and verbal identity, using Plenish's new brand proposition 'Less is Moreish' as our foundation. This included packaging for all three product ranges: juices, juice shots and plant-based milks. We then developed brand and POS toolkits for the team to roll out the brand in-house, and ongoing brand guardianship.

Key Facts:

Launch date: 9th March 2022
Design fees: [REDACTED CONFIDENTIAL DATA]

Design Approach

We knew that in order to reach the taste-driven consumer, we had to start from scratch with a new identity. One that feels vibrant, desirable and overflowing with deliciousness across every single touchpoint and brand asset. To do this and fulfil the project's commercial objectives, our identity has a number of components.

To activate the brand proposition and boost the perception of Plenish as a foodie brand, we've moved the brand into a rich, generous and inviting brand world, drawing references from modern, foodie cookbooks and design-led interiors. The wordmark cues delicious abundance with the droplet tantalisingly ready to fall. Illustrations feel natural, inviting and approachable - referencing the language of cookbooks for foodies using the products primarily as plant-based ingredients rather than health-driven alternatives. The colour palette aims to make the packs feel contemporary but indulgent. The typography is considered and elegant, with a dash of playfulness.

To boost standout and increase market share across dairy alternatives and juice shots, we used a rich, contemporary Farrow & Ball inspired colour palette to boost indulgence cues while contrasting the cooler competition on shelf. We then paired this with beautifully styled, highly detailed photography depicting generous piles of the lead ingredient on packaging and throughout the brand. They speak to the purity and simplicity of ingredients - the core USP of the range - while feeling more inviting, foodie and abundant than competitors.

And finally, to appeal to more taste-driven consumer, we upgraded the tone of voice to feel more welcoming, approachable and sophisticated. The character of the tone of voice is the 'urban chef' – a cultured cook with sophisticated tastes. Simple, benefit-focused messaging helps to elevate the product as the 'pure' choice for those with good taste.

Collaboration

We partnered with a freelance copywriter to develop a warm, inviting tone of voice and key messaging. On product photography, we worked with a freelance food photographer and a freelance food stylist.

Business 2 provided qualitative research for the initial strategic phase of the brand evolution. Business 3 provided the brand tracking data for the identity launch campaign.

RESULTS

The overall repositioning of the Plenish brand, executed through the new visual and verbal identity and packaging, has achieved impressive results.

1. **Increase the perception of Plenish as a 'delicious' 'foodie' brand that's worth paying more for among taste-driven consumers already in the market.**

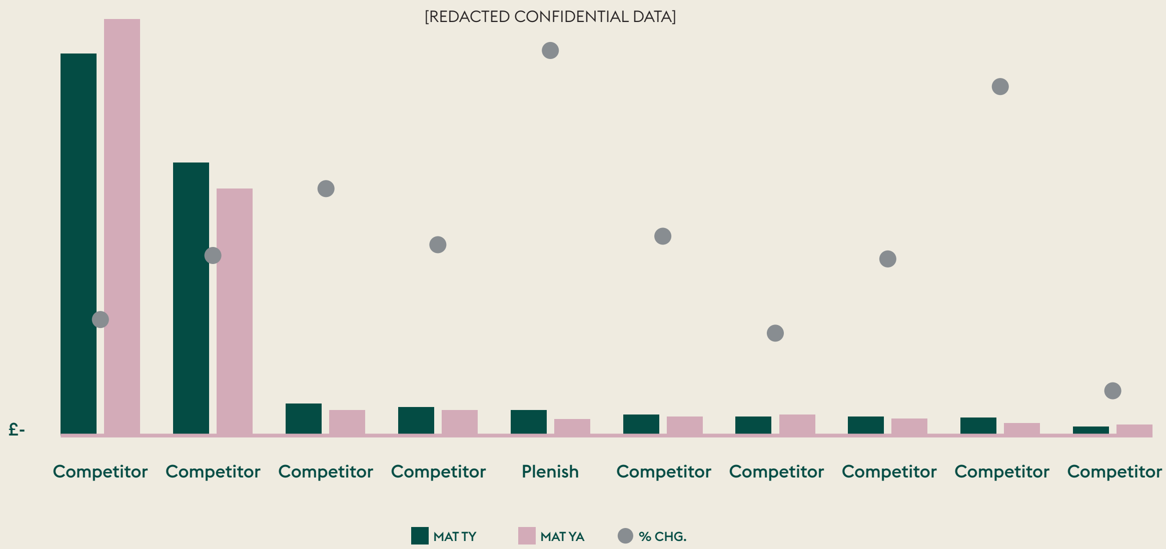
Initial brand tracking from a social media launch campaign in May 2022 has shown that the rebrand has helped Plenish to outperform competitors on key associations, once they were aware of the brand. In particular, it has significantly boosted the perception of Plenish as an appealing, delicious and superior brand with the target consumer:

- An 8% increase in the perception of Plenish products as 'looking and sounding delicious' with Foodies vs All Category Buyers, to 72% of the target segment. [7]
- An 11% increase in the perception of Plenish as a warm and inviting brand with Foodies vs All Category Buyers, to 71% of the target segment. [8]
- An 12% increase in the perception of Plenish as worth paying more for with Foodies vs All Category Buyers, to 42% of the target segment. [9]

2. **Increase Plenish Dairy Alternatives value sales by 50% by March 2023**

In the twelve months that followed the rebrand, Plenish has become the fastest growing premium dairy alternative in the total market, growing by 64.4% MAT, with total sales of [REDACTED CONFIDENTIAL DATA] for time period - rolling 52 w/e 18/03/23. This is an increase of 57% YOY for Plenish.

VALUE SALES AND GROWTH BY BRAND – TOTAL MARKET - MAT



Brands with over 1% market share, Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 9.9.23

RESULTS

And in market share, Plenish has moved from the 8th largest dairy alternative brand (pre-rebrand) to the 5th largest dairy alternative in the year following the rebrand.

MAT MARCH 2022

1	2	3	4	5	6	7	8
Competitor	Competitor	Competitor	Competitor	Competitor	Competitor	Competitor	Plenish

MAT SEPT 2023

1	2	3	4	5	6	7	8
Competitor	Competitor	Competitor	Competitor	Plenish	Competitor	Competitor	Competitor

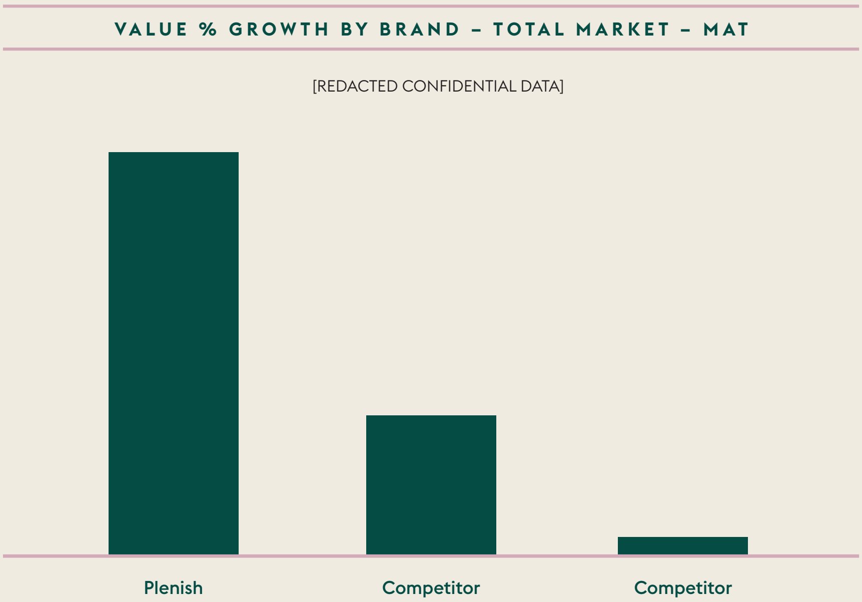
[REDACTED CONFIDENTIAL DATA]

Source: Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 5.3.22
Source: Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 9.9.23

RESULTS

3. Increase Plenish Juice shots value sales by 100% by March 2023

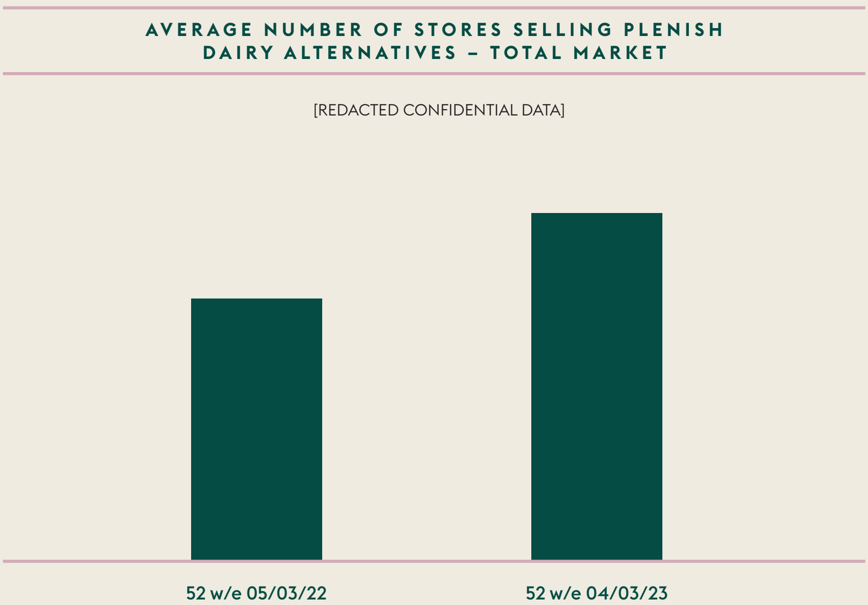
The 'shots' range has also experienced tremendous growth after the rebrand, becoming the fastest growing juice shot product in the total market, growing at 128% MAT and with total sales of [REDACTED CONFIDENTIAL DATA] for time period - rolling 52 w/e 18/03/23, considerably more than the Total Juice Shots category at +37% MAT.



Total Coverage - Grocery Multiples & Impulse GB, Value Sales % Change versus Year Ago (value in £), MAT to 23.09.23, Plenish Juice Shots vs Juice Shots Competitors (Moju, Innocent & Private Label juice shots of 60ml, 100ml, 240ml, 300ml, 420ml & 500ml offerings), ranged in any grocery and impulse outlets in the UK.

4. Increase Plenish Dairy Alternatives Distribution by 20% by March 2023

As a result of the commercial appeal of the new identity and packaging, there has been a 57% increase in the number of stores stocking Plenish products across the UK.



Source: Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured (as defined by Britvic) Value Sales MAT Data we. 5.3.22
Source: Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 4.3.23

OTHER INFLUENCING FACTORS

Broader market influences around healthy eating

There's a clear swing towards healthier eating in the wake of the Covid pandemic, linked to a desire to maintain good health through positive nutrition. According to the Mintel 2022 Healthy Eating Report, 67% of UK adults agree that it is important that their diet is healthy for both themselves and the planet.[10] This belief is tied to a rise in plant-based eating[11], perceived by some as a healthier choice for themselves and for the environment.

Post-pandemic consumption shifts

In 2020, the Dairy Alts category saw significant growth around Covid lockdowns because consumers were at home a lot more making coffees/beverages at home more frequently. There was also a shift in consumer behaviour as people switched from dairy milk over to plant-based/UHT milks because they had a much longer shelf life, meaning people needed to visit the shop less frequently.[12] In 2022/2023, the Dairy Alts category actually contracted 4.1%[13] as this behaviour bounced back to baseline - which makes Plenish's growth in the market more impressive.

Marketing Activity

Since the brand launch, Plenish have run three TTL campaigns in May 2022, September 2022 and January 2023. The goal of each campaign was to raise awareness of Plenish and educate the consumer, using a clear, unifying creative platform to communicate the superiority of our product proposition, and encouraging shoppers to 'switch to Plenish' targeting existing dairy-alt shoppers to trade up. These campaigns each ran across OOH, BVOD, print press, social and digital platforms, with a total spend of [REDACTED CONFIDENTIAL DATA].

REFERENCES

[1] (Statista (2023) Sales forecast of organic milk alternatives in the United Kingdom (Accessed: 31/010/23).

[2] Mintel (2023) Dairy Alternatives - UK - 2023 [private report - accessed 31/10/23]

[3] Statista (2023) Juices - United Kingdom. (Accessed: 31 October 2023).

[4] Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 5.3.22 22

[5] C. Alveson (2022) '2022 State of the Beverage Industry: Plant-based dairy alternatives persistently grow', Beverage Industry (Accessed: 31 October 2023).

[6] Plenish (2021) Plenish Qualitative Research Debrief. p. 24

[7] Plenish Brand Tracking Report May 2022

[8] Plenish Brand Tracking Report May 2022

[9] Plenish Brand Tracking Report May 2022

[10] Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 4.3.23

[11] Mintel (2022) UK Attitudes towards Healthy Eating - Market Report 2022. (Accessed: 31 October 2023).

[12] Mintel (2023) Dairy Alternatives - UK - 2023 [private report - accessed 31/10/23]

[13] Nielsen, Total Coverage, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) Value Sales MAT Data we. 4.3.23