

ROYAL CHALLENGE

: REDESIGNED. RECLAIMED. REIGNITED.

FOR PUBLICATION

DBA DESIGN EFFECTIVENESS AWARDS ENTRY - JULY 2025

BRANDING AGENCY

BULLETPROOF

CLIENT

DIAGEO INDIA





Image: Royal Challenge key visual with the redesigned packaging

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EXECUTIVE SUMMARY

In 2021, Royal Challenge — one of India’s oldest whisky brands — was losing volume, share, and relevance in an increasingly competitive market. While historically known for its bold character and association with cricket, its intense, masculine tone no longer resonated with younger drinkers. New entrants were winning with smoother blends, inclusive storytelling, and more modern brand worlds.

Although the liquid had been reformulated to be smoother, awareness of this shift was as low as 4% of target consumers aware of the change, and trial was failing to convert to loyalty. Younger LDA-30 consumers viewed Royal Challenge as outdated, unapproachable, and harsh. India’s “dark market” restrictions meant traditional advertising was not an option. Design was the only lever available to drive transformation.

The brief was to rebuild relevance and reframe Royal Challenge’s boldness in a way that felt modern, smooth, and aspirational. This included a complete redesign of the bottle structure, label, brand world, pack architecture, and retail system. The new design needed to bridge the gap between product

experience and consumer perception while increasing distinctiveness, driving shelf presence, and supporting the brand’s repositioning under the “Own Your Bold” platform.

The results speak volumes. Since relaunch, Royal Challenge has delivered:

- **<REDACTED CONFIDENTIAL DATA>**
- Volume growth exceeded expectations, rising from **<REDACTED CONFIDENTIAL DATA>**
- **+3.6 points in market share**
- **<REDACTED CONFIDENTIAL DATA>**
- Trial-to-loyalty ratio flipped from **<1.0 to >1.0 vs target of >0.5 <REDACTED CONFIDENTIAL DATA>**
- **<REDACTED CONFIDENTIAL DATA>**
- **First-time buyer share rose from 24% to 42%**
- “Aggressive” dropped as a brand attitude, replaced by “**Modern**” and “**Youthful**”
- **78%** of target consumers now associate the design with **smoothness vs the target of 50%**

Critically, the redesign didn’t just perform commercially—it paid back with extraordinary speed. With a total design investment of just **<REDACTED CONFIDENTIAL DATA>** It paid for itself in **under a week**.

The result is a brand that is growing faster, commanding more attention, and delivering more value—powered not by deep discounts or ad blitzes, but by a confident, consistent brand world rooted in strategic design.

This is a rare example of design not just refreshing a legacy brand, but transforming commercial performance, consumer perception, and cultural relevance — in a market where design must do all the heavy lifting.



Image: Bottle and carton packaging before (left) and Redesign (right)



"The agency deep-dived into our core identity to collaborate and has been a wonderful partner in helping us bring the vision for the brand to life. Royal Challenge is now successfully attracting a greater diversity of consumers, thanks to our impactful new design.

The outcome of the redesign has been exceptional. We have received fantastic market feedback and have achieved remarkable sales results across all channels. [The agency] perfectly understood the challenge we set, and the result speaks for itself.

We are really proud of the results and are thrilled that this agency could partner with us on such a significant change of direction for Royal Challenge."

- Hiren Dedhia, Head of Design, Diageo India



BUSINESS BACKGROUND & MARKET CONTEXT

Royal Challenge is one of India's most established whisky brands, known for its bold positioning, premium mid-prestige profile, and past associations with sports and IPL cricket. Its blend of Indian grain spirit with imported Scotch malts made it popular among older SEC AB consumers, but by 2021, its legacy had become a liability.

The whisky category had undergone rapid fragmentation. Once dominated by Royal Challenge and Royal Stag, the segment was now being reshaped by newer entrants like Oaksmith and Sterling Reserve B7 — brands with smoother liquids, more emotionally engaging narratives, and inclusive, modern aesthetics. These newcomers captured 25% of the market and were quickly gaining momentum among urban, younger consumers.

Meanwhile, Royal Challenge was struggling. Research showed that its design no longer reflected the improved liquid quality. The old identity was described as "dated," "aggressive," and "unapproachable," especially by LDA-30s. Misattribution to Royal Stag was high, logo recognition was low, and colour codes felt overly masculine. Volume was in decline, SKUs underperformed, and the trial-to-loyalty ratio was below 1.0.

Compounding the issue: India's strict advertising laws meant Royal Challenge couldn't rely on a large ATL campaign to reintroduce itself. It is a dark market, with no whisky advertising allowed, making packaging the lead medium for communicating brand and product improvements.

THE BRIEF

Initially, the project was a fast-tracked packaging refresh to better reflect the smoother liquid and appeal to a younger audience. However, early insight work uncovered deeper systemic gaps between product, perception, and pack, prompting an expanded scope.

The final brief included:

- A complete redesign of packaging and identity.
- Evolved bottle structure and architecture.
- Refreshed brand assets, visuals, and tone for dark/light markets.
- Codified visual guardrails for future comms.
- A visual system that could scale without violating legal restrictions.

With no unusual in-market activations, no celebrity push, no price promotion, and no campaign spend beyond existing brand baselines, this relaunch would stand or fall on the strength of its design.

KEY OBJECTIVES

- 1. Drive volume growth and brand relevance** within the mid-prestige whisky segment by repositioning Royal Challenge for a younger, SEC AB audience (LDA-30), with particular focus on light buyers and new entrants.
- 2. Overhaul the packaging and identity system** to reflect a bolder, more contemporary, inclusive brand world, shifting away from perceptions of aggression and intensity.
- 3. Increase awareness and understanding of the improved liquid proposition** ('smoother and richer') through packaging and communication, particularly in renovation markets where awareness was low (as low as 4% in some regions)

SCOPE OF PROJECT

- Brand identity and positioning-in-house
- Brand world - in-house
- Brand assets - in-house
 - New brand mark (typography)
 - Lion icon illustration
 - Gradient background/pattern
 - Roundel
 - Renders
 - Key visuals
 - Motion video imagery

Launch date of the project:
October 2022

Design fees:
<REDACTED CONFIDENTIAL DATA>

DESIGN SOLUTION

The design solution for Royal Challenge was rooted in reframing what boldness meant for a new generation. Our task was to evolve a legacy brand into something more culturally resonant—balancing power with approachability, and heritage with modernity. We began by reworking the brandmark. Drawing on the impactful characters of the previous identity, we introduced contemporary, curved serifs and rounded detailing to strike a careful balance between strength, elegance and inclusivity. This typographic approach reflected the smoother liquid and aligned with the brand's shift toward a more refined and inviting personality.

Next, we reimagined Royal Challenge's iconic lion. Previously rendered in a heraldic style that reinforced a dated and overly masculine image, the new symbol was designed to be fresher and more minimal, retaining its role as a marker of strength and regality while embodying the brand's redefined take on boldness: confident, current and culturally aware. We incorporated modern whisky design cues into the packaging to reinforce storytelling and credibility. The Master Blender details were simplified for clarity, while the roundel was enhanced to convey a sense of prestige. Tactile finishes and embossing added layers of texture and interactivity, offering a premium, sensory experience that invites discovery at every touchpoint.

Refining the bottle, we extended the label and removed the embossed lion to create a sleeker, more confident silhouette. We stripped back the heavy use of black. We introduced brighter, richer tones to shift the brand away from its intense, masculine aesthetic and toward something more vibrant, celebratory and inclusive. Recognising the limitations of alcohol marketing in India, particularly in dark markets, we developed a set of key visuals tailored to both regulated and unregulated environments. These assets challenged traditional whisky codes by embracing inspiration from sports and fashion worlds that resonate with our younger target audiences.

In light markets, we showcased the new packaging prominently, highlighting the smoothness of the whisky and pairing it with energetic graphic patterns to signal vitality and youth. We leveraged our brand icon, cricketer Virat Kohli, for dark markets to lead a campaign centred on collective purpose. We created a call to action that invited consumers to be part of something bigger—shifting perceptions of Royal Challenge from individualistic and aggressive to inclusive, empowering and socially connected. By designing a flexible, unified system across physical and visual touchpoints, the new identity and packaging reflected the improved liquid. They actively reshaped how Royal

Image: Key visual with redesigned packaging, highlighting the smooth liquid



RESULTS

OBJECTIVE 1:

Drive volume growth and brand relevance within the mid-prestige whisky segment by repositioning Royal Challenge for a younger, SEC AB audience (LDA-30), with particular focus on light buyers and new entrants.

Since the October 2022 redesign, Royal Challenge has delivered category-leading growth, clearly demonstrating its success in winning a younger, more premium-leaning audience.

The brand's volume CAGR has nearly doubled from 11% pre-redesign to 21.8% post-redesign, <REDACTED CONFIDENTIAL DATA>. Market share has leapt <REDACTED CONFIDENTIAL DATA> a +3.6 point increase, the most significant gain in the segment, making Royal Challenge responsible for 37% of total category volume growth over the same period.

But this is not just a volume story. <REDACTED CONFIDENTIAL DATA>. This outpaced the total category value growth (10.5%) and eclipsed rivals like Sterling Reserve, which declined by 26%, and Oaksmith, whose gains remained marginal in comparison.



The brand's appeal to new and light buyers has also strengthened significantly. In renovation markets:

- **First-time buyer share grew from <REDACTED CONFIDENTIAL DATA> (+18 points).**
- **Purchase intent among light buyers rose +27%.**
- **Re-recruitment (buyers repeating within 12 months) grew 18%.**
- **Repeat-purchase intent among LDA 21-30s rose by 12 points.**
- **The average spend per bottle among 25-29s is now 9% higher.**

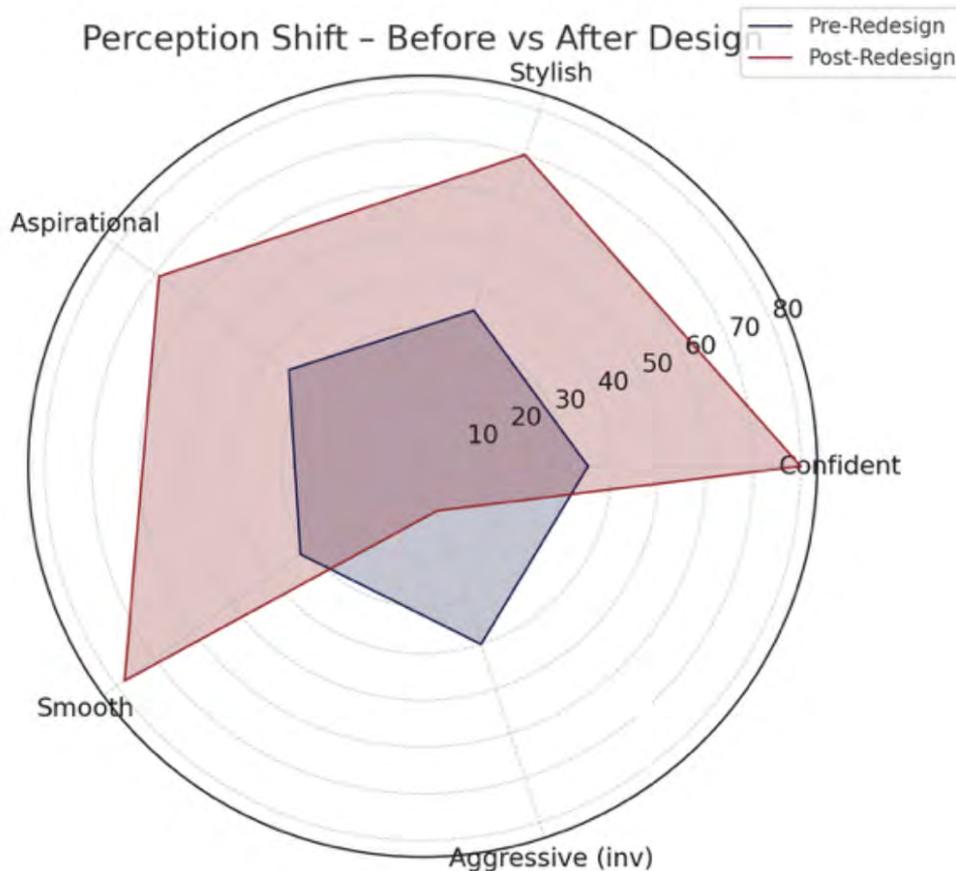
Meanwhile, the **trial-to-loyalty ratio has flipped** from <1.0 to >1.0—an essential signal of sustained behavioural change. Royal Challenge is not just attracting attention—it is converting trial into loyalty and growing lifetime value. Taken together, these metrics show Royal Challenge is not only driving category-leading volume and value growth, but doing so by widening its base and deepening brand relevance with its intended audience. The brand is delivering commercial outcomes through cultural reappraisal—growing faster, commanding more value, and doing it with the right consumers.

<REDACTED CONFIDENTIAL DATA>

OBJECTIVE 2 :

Overhaul the packaging and identity system to reflect a bolder, more contemporary, inclusive brand world, shifting away from perceptions of aggression and intensity.

Pre-redesign, Royal Challenge was seen as dated, overly masculine, and harsh language that alienated younger, progressive drinkers and weakened shelf presence. The new design system has decisively replaced this with a more inclusive, premium, and aspirational brand world.



Consumer perception has changed dramatically:

- **80% now describe the design as “confident”**
- **70% say it’s “stylish”; 69% call it “aspirational”**
- “Aggressive” was the #1 descriptor pre-launch; now replaced by words like “modern,” “smooth,” “bold but not brash”
- The lion logo—a once underutilised asset—has become a key point of distinction, with visual asset strength scores rising from 98 to 113

The new identity is not just attractive—it is high-performing. Shelf recovery post-redesign has been notable:

- **Flash Pack data showed improved SKU movement**, especially in the 750ml format
- Retailers describe the new pack as “premium” and “good to stock,” increasing on-shelf desirability
- A retailer in Haryana captured the sentiment best: “Kya kar diya hai Royal Challenge pe—current lag gaya!” (“What have you done to Royal Challenge—I got an electric shock!”)

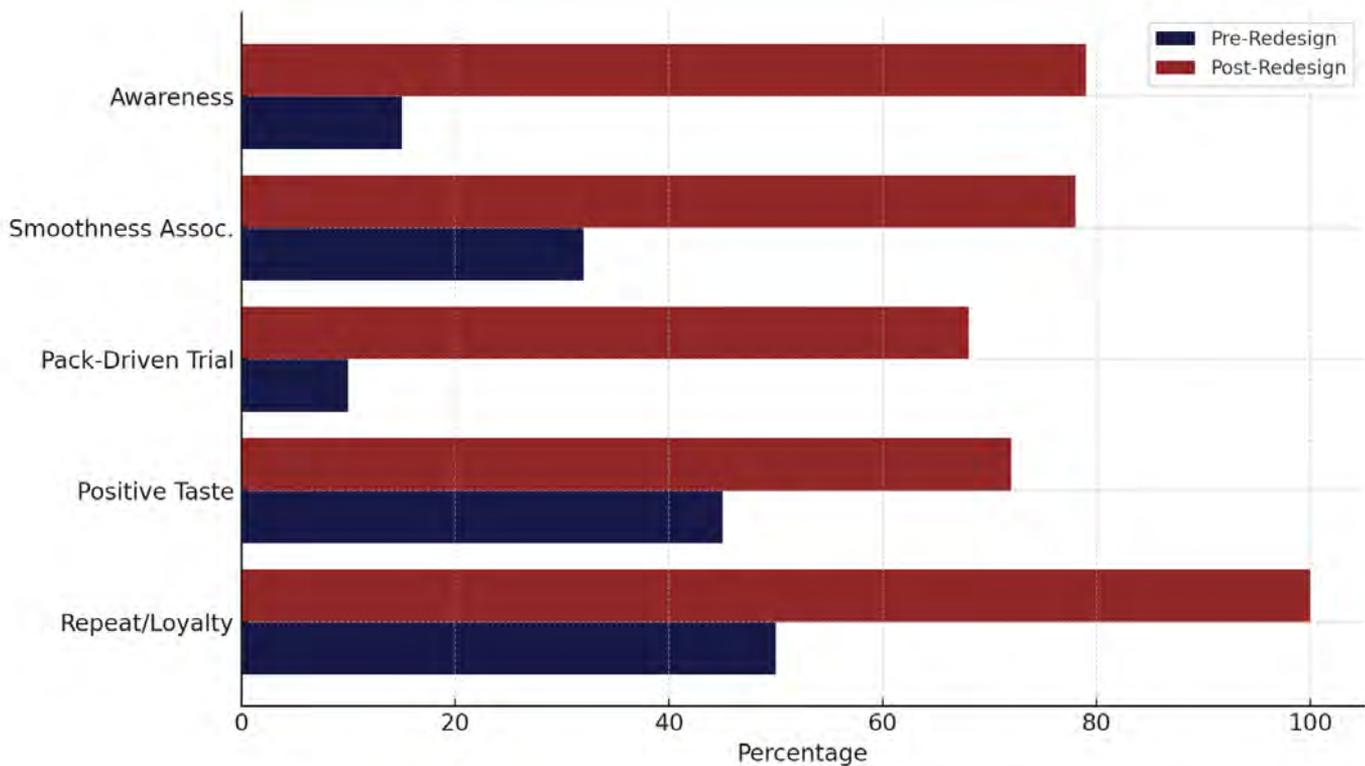
Internally, a refreshed sales toolkit brought new clarity and pride to trade engagement. Externally, the system proved highly scalable and fast to activate: 90% of markets were live within just six months, far ahead of typical Diageo rollout timelines (12–18 months). Across ATL, BTL, digital, and in-store, the identity holds strong and signals premium value.

The result is a holistic shift in how Royal Challenge shows up: contemporary, coherent, and confidently different—appealing to both trade and consumers while firmly shaking off past perceptions.

OBJECTIVE 3 :

Increase awareness and understanding of the improved liquid proposition ('smoother and richer') through packaging and communication, particularly in renovation markets where awareness was low (as low as 4% in some regions).

One of the most significant success stories of the redesign is its ability to bridge the gap between product truth and consumer perception. Prior to the redesign, awareness of Royal Challenge's upgraded liquid proposition was patchy at best—only 4–25% of consumers (depending on region) were aware of the smoother, richer taste.



Post-launch, this has shifted decisively:

- **Awareness of the smoother liquid now stands at 79%**
- **Smoothness association rose <REDACTED CONFIDENTIAL DATA> (+46 pts)**
- **"Looks as smooth as it tastes": 80% agreement**—an unusually high pack-to-liquid alignment
- **Functional satisfaction (smooth drinking experience)** rose from 45% to 72% (top-2 box) among LDA-30s

In a 2022 quantitative test, 68% of new buyers said the **pack directly influenced their decision to purchase**, placing the redesign well above industry benchmarks for pack-led conversion.

Repeat-purchase behaviour confirms that this isn't cosmetic. Consumers are returning. Loyalty ratios have surpassed parity, and re-recruitment rose 22 points within 12 months of launch. The new design has turned curiosity into trial, and trial into trust.

In short, the pack doesn't just look better. It now says "smoother and richer" and delivers on that promise, driving real behavioural change and lasting brand affinity.



DRINK RESPONSIBLY

AN INVITING
NEW EXPERIENCE

SMOOTH
SMOOTH
SMOOTH

CHALLENGE

BEYOND THE BRIEF: A DURABLE STEP CHANGE

Royal Challenge didn't just meet its original objectives—it redefined what was possible for a heritage brand operating in one of the world's most competitive whisky segments. The redesign delivered a commercially, culturally, and operationally significant transformation that reshaped the brand's entire trajectory.

In commercial terms, the results were emphatic. Following the redesign, Royal Challenge generated an **<REDACTED CONFIDENTIAL DATA>**, outpacing both category growth and most of its direct competitors. It added **<REDACTED CONFIDENTIAL DATA>** a striking **37% of total category expansion** since FY22.

Critically, the project also delivered an extraordinary return on investment. **<REDACTED CONFIDENTIAL DATA>** — a powerful demonstration of design's commercial value.

But the impact extended far beyond the numbers. In reputation and relevance, Royal Challenge surged ahead, closing perception gaps with established leaders like Royal Stag and overtaking challenger brands in both salience and emotional equity. On-shelf presence was revitalised, with measurable uplift in shelf movement, format mix, and SKU performance across priority regions.

The redesign created a system that not only looked good, but also worked. Field teams reported renewed confidence and consistency in trade execution, with sales force activation and retail sentiment buoyed by a packaging system that felt **distinctive, desirable, and easy to champion**. Operationally, the rollout was executed at pace and scale, achieving **90% market coverage within six months**—a clear signal of internal belief and alignment.

In short, this was not a campaign. It was a platform. And its effects were systemic.

Today, **one in five bottles sold** in the segment carries the Royal Challenge label—up from one in six just two years ago. The brand is **growing faster, commanding more attention, and delivering greater value**, proving that thoughtful design can do far more than beautify a pack.

<REDACTED CONFIDENTIAL DATA>



Image: Dark Market key visual featuring cricketer Virat Kohli

OTHER INFLUENCING FACTORS

The success of the October 2022 redesign is even more striking when viewed against the constraints under which it was delivered. First, the FY23 launch was executed on a **10 per cent smaller budget** than the previous redesign in FY21.

Second, there was **no incremental activity beyond business-as-usual** in the 12-month period following the new pack's debut: no additional price promotions, no special distribution pushes, and no one-off activations that might artificially inflate trial or visibility.

Thirdly, no price promotions were undertaken during the relaunch, as discounts are not permitted in India due to excise laws.

Finally, the brand operates in **India's "dark" alcohol market**, where television, outdoor, and digital advertising for spirits is heavily restricted. Unlike many global launches that can rely on large-scale campaigns to amplify a new identity, Royal Challenge had to depend almost entirely on its **packaging and in-store presence** to drive awareness and adoption. That the redesign delivered such substantial improvements—despite a lower budget, a history of redesign failure, limited media support, and no extraordinary trade activity—underscores the intrinsic strength of the new identity and its precise fit with consumer needs.

SOURCES

- IWSR (2022-2025)
- Company Internal Sales Tracker (Diageo India)
- Brand Equity Tracker (2021–2025)
- Pre/Post IPL Tracker (2022)
- Topline Packaging Evaluation (Quant, 2022)
- Qualitative Focus Groups (Pre-Launch & 6 Months Post)
- Flash Pack Shelf Movement Data (Post-Launch, 2023)
- Retailer Interviews (North India & Tier-1 Cities, 2022–2023)
- Sales Force Toolkit Feedback (Internal, 2022–2023)
- Design Rollout Operations Log (Internal, 2022–2023)

CREDITS

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