



# CHALLENGER BRANDS UPDATE 2024

Presented by: **Jaz Foster & Manuela Isliker**

# Challenger Brand Update

## FROM 2021

What  
**Challenger brands do**  
to make people feel special

### The Ask:

### 2021 Update for Challenger Brands POV

Team: Jaz Foster, Helen Wolf, Cherie Leonard, Kalindi Mehta

[Click here to see  
Challenger brands 2021](#)



## TO 2024

What  
**you can do**  
to be a Challenger and grow  
your brand



Team: Jaz Foster & Manuela Isliker



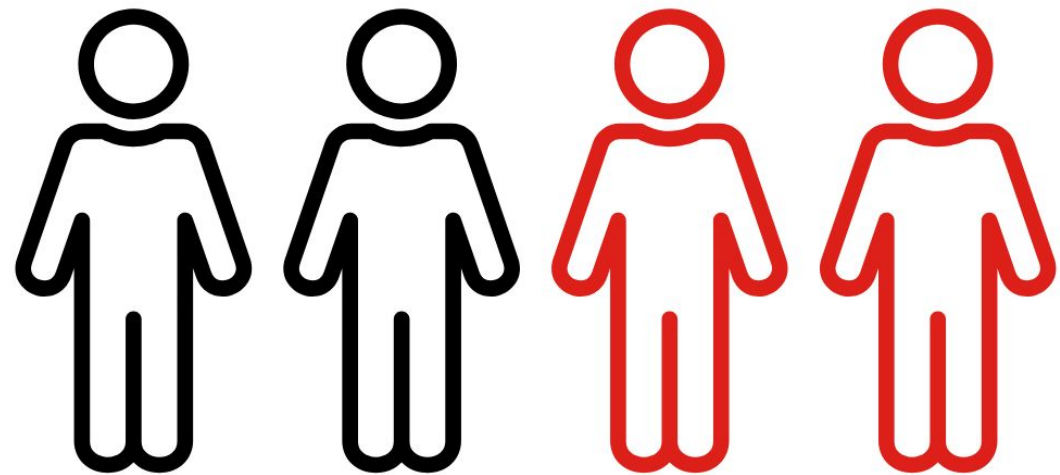


# SO WHAT?

# 50%

**of shoppers prefer  
whenever possible to  
buy from smaller  
companies rather  
than larger global  
brands**

KANTAR BRAND FOOTPRINT 2023



# 56%

**Of small brands  
are growing**



# 37%

**Of all other brands  
are growing**

Affording them  
growth in a fiercely  
competitive CPG  
environment

SOURCE: KANTAR WORLD PANEL, GFK FCMG BRANDS, CRP GROWTH  
2022 VS 2021 SMALL BRANDS 1 TO 10% PENETRATION





**BUT I'M A BIG  
BRAND...**

*"A Challenger brand is not defined  
by its size but its aim to upend the  
status quo"*

**Raul Raj**

CMO of the Challenger brand Agency

**Anyone can be a  
challenger as long  
as you have the  
mindset to be one**

**We Have to Think Differently  
To WIN**

# HOW DO CHALLENGERS THINK?



Georgina Gooley,  
Co-Founder of Billie Razor



Eric Ryan,  
Creator of Olly, Welly & Method



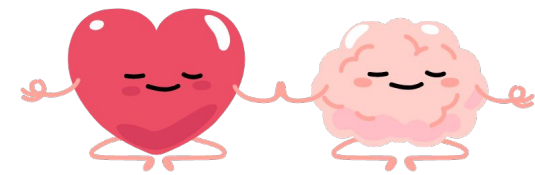
Todd Kaplan  
VP of marketing @ Pepsi



John Schoolcraft  
Global Chief Creative Officer @ Oatly

## A CHALLENGER MINDSET IS:

Vision and grit aren't just buzzwords—they're your **blueprint**



# HOW DO CHALLENGERS THINK?



Georgina Gooley,  
Co-Founder of Billie Razor



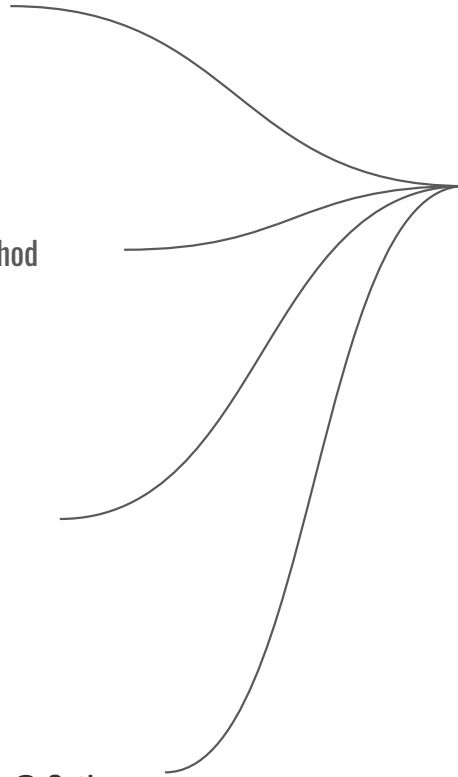
Eric Ryan,  
Creator of Olly, Welly & Method



Todd Kaplan  
VP of marketing @ Pepsi



John Schoolcraft  
Global Chief Creative Officer @ Oatly



## THE TOOLS IN YOUR TOOL BELT

Seeing the unseen

Disrupt with purpose

Exist boldly

Sell revolutions, not just products

# HOW DO CHALLENGERS THINK?



Georgina Gooley,  
Co-Founder of Billie Razor



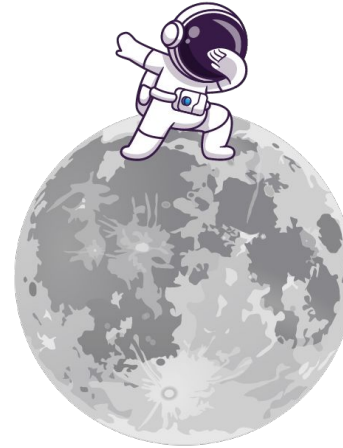
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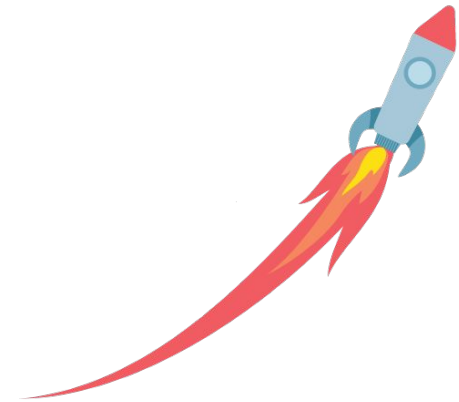
Todd Kaplan  
VP of marketing @ Pepsi



John Schoolcraft  
Global Chief Creative Officer @ Oatly



**THE RESULT**  
**Creating a brand that matters,  
not just one that exists**





**To the Market**  
Change category codes and  
cultural context

**WHAT CHALLENGERS DO**

**To Competitors**  
Make the established  
norms no longer  
relevant

**For People**  
Make people feel special  
where the status quo  
does not

# HOW DO CHALLENGERS THINK?

## IT'S A MINDSET & A COMMITMENT TO CHANGE

Building a company from scratch starts by asking yourself two simple questions: **Why would anyone care you exist?** And, how are you going to differentiate yourself? You need to have a **clear vision and the grit to see it through.**

Georgina Gooley,  
Co-Founder of Billie Razor



**Being a challenger is having a mindset** of realising you're trying to **change something**, rather than be a challenger to be cool and help sell more products. Because **consumers will be able to feel it.** Of course, we want to sell our product, but we want to **challenge the norms** at the same time, and that's bigger. If you can get that right, you're going to sell a lot of product, and we need to sell the product so that can continue to do what we're doing.

John Schoolcraft  
Global Chief Creative Officer  
@ Oatly



"Most entrepreneurs start with an idea, and **I start with a category**, find a space that is big ripe for disruption. What is the **cultural shift big macro trend that a category is missing.** Creating **something you want not just something you need.**"

Eric Ryan,  
Creator of Olly, Welly &  
Method



Part of being a challenger brand is really being **confident enough in your own skin**, who you are as a brand, and also in today's consumer landscape. **Consumers can sniff through bullsh\*\***, and so it really comes down to truly **acknowledging the world as they see you.** And then what's your point of view? What are you going to do with that? How do you add something back to that?"



Todd Kaplan  
VP of marketing @ Pepsi

Before we begin...

Let's get real

Are you up for making those  
**slightly uncomfortable, but game-changing** moves  
that can redefine your brand?

Are you going to let these insights  
just be a shower thought or are you ready to  
**invest and take action** to meet your strategic goals?

# What we will share

## **Principles**

How to think like a challenger

## **Case studies**

*What challengers have done & what the establishment did*

# We want to hear from you

## **What if We...**

What would it look like if we were to apply the principles to our brands?

Jamboard Link

# HOW CHALLENGER BRANDS MAKE PEOPLE FEEL SPECIAL

## Recap of Challenger Brands 2021

*What we learned*

|                                |                                                                                                                                                                                                                                                                                                      |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User<br>Obsession              | <ul style="list-style-type: none"><li>• Showing You know your users by focusing on overlooked pain points</li><li>• Delivering the “feeling” of personalization and curation to people’s needs</li><li>• Delivering premium benefits without trade offs</li></ul>                                    |
| Humanification<br>Of Marketing | <ul style="list-style-type: none"><li>• Being a part of Cultural conversations and movements</li><li>• Talking about benefits in a human way</li><li>• Involving consumers in co-creation of innovation</li><li>• Deliver value through content, entertainment and even moods or emotions.</li></ul> |
| Aesthetically<br>Polarizing    | <ul style="list-style-type: none"><li>• Visual contradiction by defying category expectations</li><li>• Simplify with conversational human language. No BS.</li><li>• Emulate self expression to magnify identity driven semiotics</li></ul>                                                         |

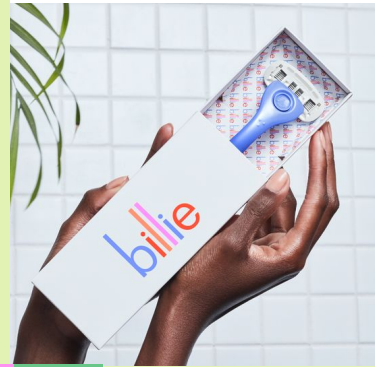
# THE CHALLENGER BRAND PRINCIPLES



User  
Obsession

1

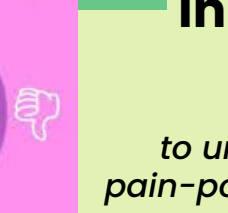
**Break from the convention of today**  
*Don't be afraid to pioneer based on changing norms in society*



2

**Innovate on the fringes**  
*to uncover deeper burning pain-points that will be in service of everyone*



| US                                                                                  | THEM                                                                                |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  |  |
|  |  |
| <b>3g</b><br>NET CARBS                                                              | <b>21g</b><br>NET CARBS                                                             |

3

**Treat People as innovators**  
*Understand & activate on how people are using your products, not just how you want them to use it*



# THE CHALLENGER BRAND PRINCIPLES



## Humanification of Marketing

4

**Say the quiet part out loud!**

What's traditionally considered Taboo  
can be empowering for people too.

A woman in a yellow outfit holding a baseball bat, with a small orange circle floating near her hand. To the right is a bottle of OLLY Purely Probiotic.

An advertisement for Billie featuring two women. One woman is lying down with her arm raised, and the other is sitting up. The text "HOWEVER," and "WHENEVER," is visible above the women. The brand name "billie" is prominently displayed in the center, with "THE NEW BODY BRAND" written below it.

5

**If a 7 year old can't  
understand it  
we shouldn't be saying it.**

*Don't make people work hard,  
Marketing language is the enemy  
of clarity.*

6

**Mass Market is not always  
the First step it's often the  
last.**

*Build your innovation within your  
target audience first to create  
congregation around your product*

A man with tattoos holding a bottle of Liquid Death Mountain Water. To the right is a logo for Welly Bravery Badges featuring a stylized purple cat face wearing sunglasses.





# THE CHALLENGER BRAND PRINCIPLES

Aesthetically  
Polarizing

7

## Use Design as a superpower

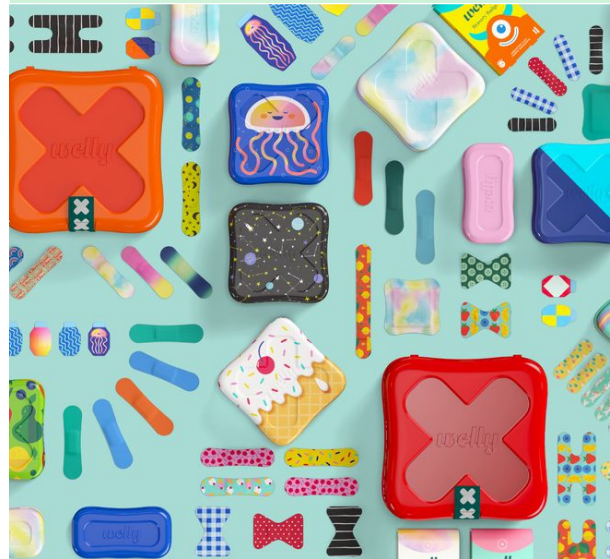
to emotionally connect with  
people in ways the category  
tends to overlook



8

## Design is more than graphics!

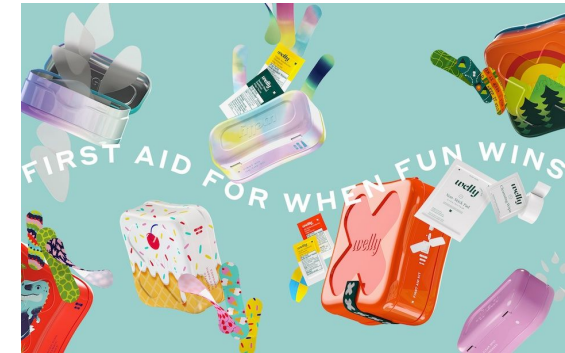
*Innovation should be driven by  
user experience*



## Case studies

*What challengers have done &  
what the establishment did*

IT'S LIKE  
MILK, BUT  
MADE FOR  
HUMANS.



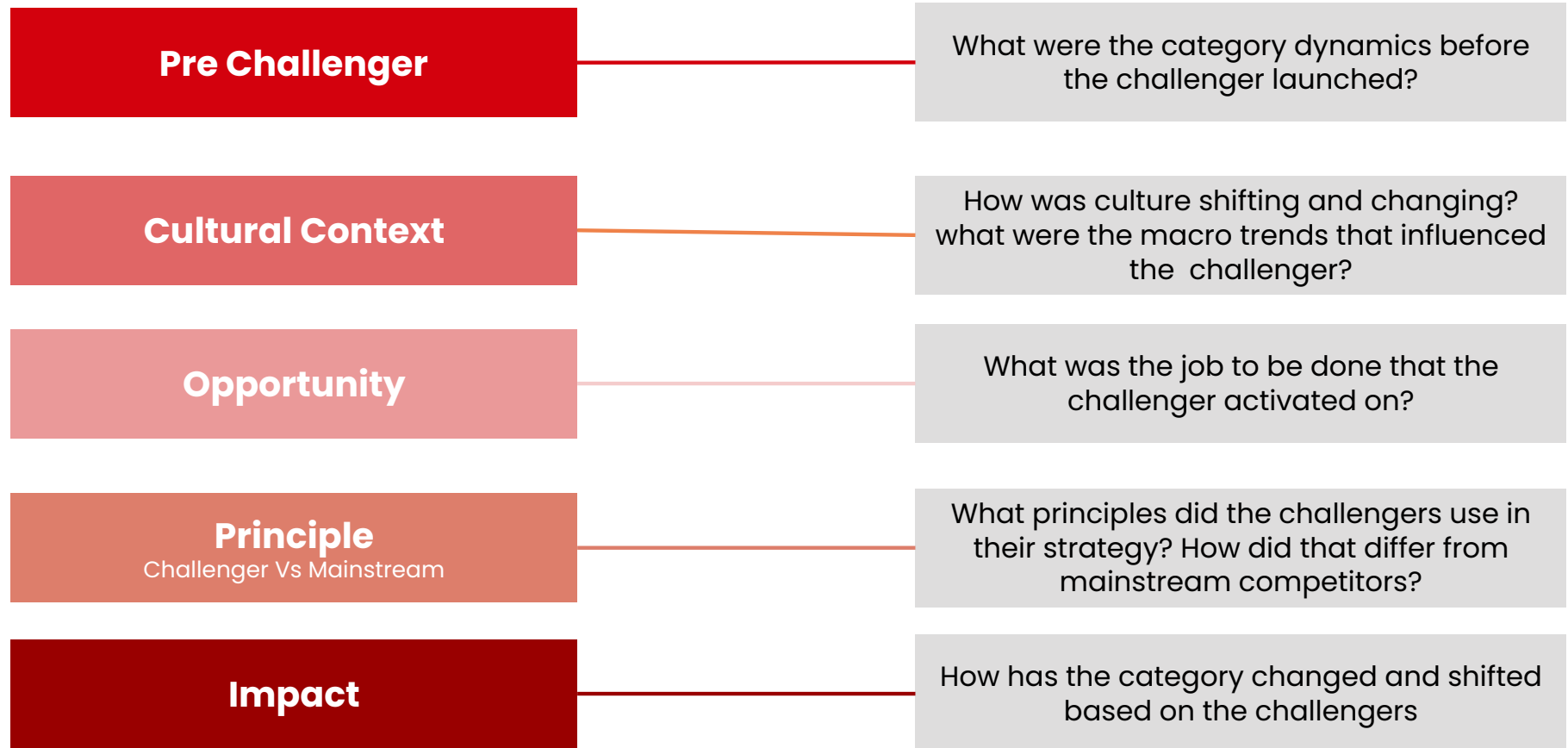
APPLY NOW!  
For A FREE  
Sample



Smell  
Better  
Naked



# WHAT TO EXPECT FROM CHALLENGER BRAND CASE STUDIES



# CATEGORY CASE STUDIES



**BEER**

**WATER**

**DEODORANT**

**MILK**

**YOGURT**

**RAZORS**

**VITAMINS**

**DIAPERS**

**BANDAGES**

**CEREAL**

**HYDRATION**

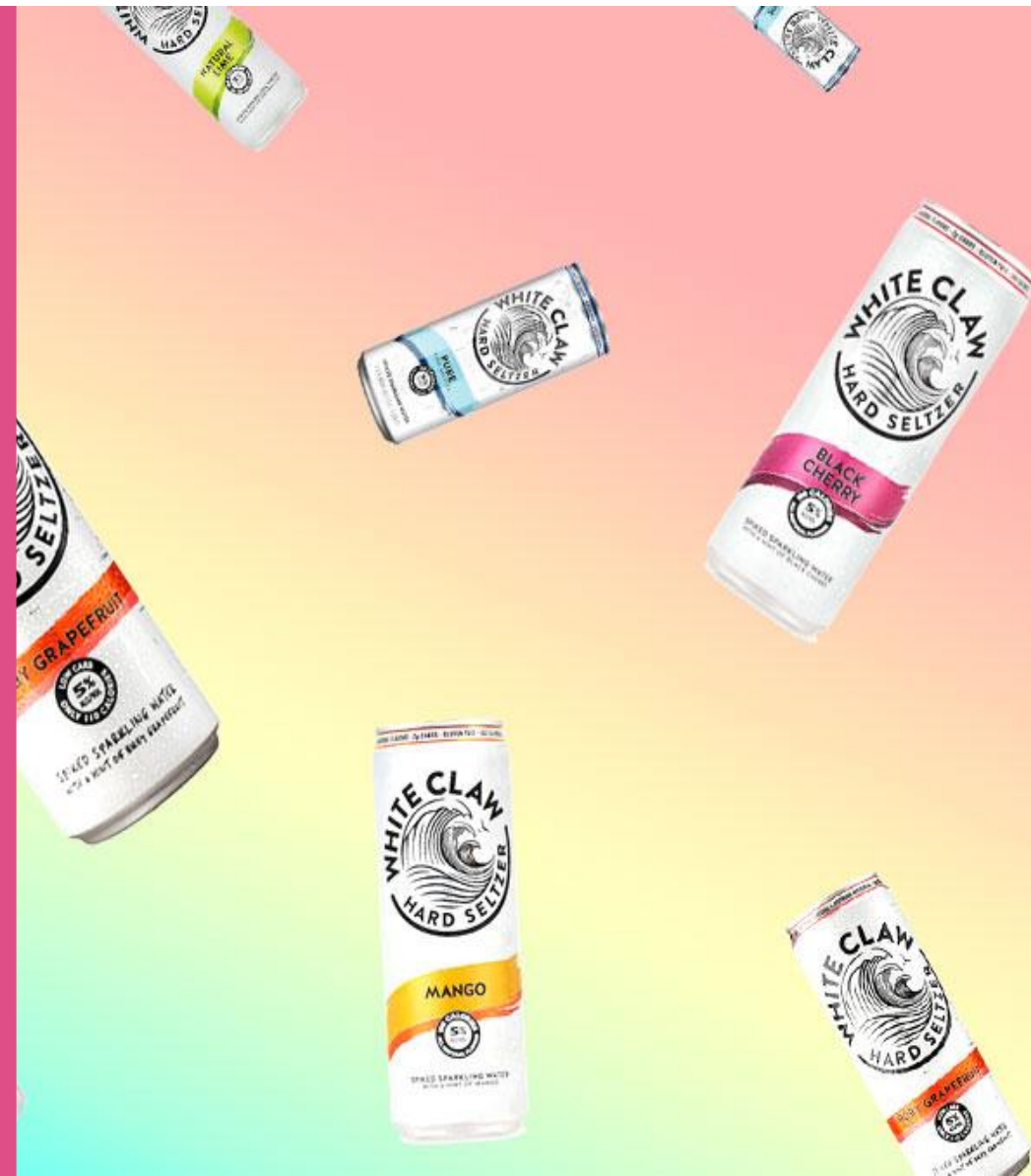
[Click on the category to go to a case study](#)



Category

# BEER

Vs



## Pre Challenger Category Dynamics



### **Craft vs Domestic**

Competition heats up and craft brewers grew exponentially between 2010–2018.



### **Beer is Beer or is it?**

Drinking craft beer became a lifestyle status and identity signal. In come the hipsters & “beer snobs”



### **male dominated category**

Marketing, advertising packaging was often focused on appealing to men

## **BEER PAIN POINTS**

Very filling/carb heavy  
Lacked variety on taste  
(Hops & Wheat based)

Higher ABV

Price heavily influenced  
quality and experience  
Culturally not inclusive

**Pre Challenger**

Cultural context

Opportunity

Principle

Impact

# White Claw Launched in 2016



## Health & Wellness

The expansion of health from fitness & weight loss to "self care" & balance. In 2014 53% of Millennials said they were concerned their unhealthy habits will soon catch up with them.

[Click here for more information](#)

## Shifting Gender Expectations

The definition of masculinity is changing and people are questioning dynamics gender roles. Obergefell v. Hodges recognizes same sex marriage in 2015

[Click here for more information](#)

## Income inequality

Value and affordability is a hot topic, people questioning economic dynamics between rich and poor. Investment in SNAP benefits declined 2012 - 2014 while # of families in poverty grew

[Click here for more information](#)

Pre Challenger

Cultural Context

Opportunity

Principle

Impact





Launched in 2016

White Claw saw the category was missing

**A healthier refreshing Beer alternative that has a great taste with flavors for everyone.**

Pre Challenger

Cultural context

Opportunity

Principle

Impact

# White Claw's Challenger Brand Principles

4

**Say the quiet part  
out loud!**

*What's traditionally  
considered Taboo can be  
empowering for people*

Humanification of Marketing

1

**Break from the  
convention of today**

*Don't be afraid to pioneer  
based on changing norms  
in society*

User Obsession

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

USER OBSESSION PRINCIPLE: Don't be afraid to pioneer based on changing norms in society and break from the convention of today



6-pack \$9.99

They competed with health centered claims like gluten free, low carb and natural flavors "sparkling water"

**White claw reframed benefits that the category could deliver a comparable value.**

They added variety to a traditional taste profile finding an untapped demand space



6-pack about \$8.80

The mainstream focused on mainly taste and ingredient superiority offering little perceivable differentiation between offerings

Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

er

Impact

Humanification of Marketing PRINCIPLE: Say the quiet part out loud! What's traditionally considered Taboo can be empowering for people

## White Claw Made it permissible for men to drink something other than beer

Tapping into millennial culture By embracing ironic self deprecating stigma of being seen as a feminine drink. Making it an inclusive way to have fun with friends.



The Mainstream used language centered in performance and used masculine sports focused imagery



Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

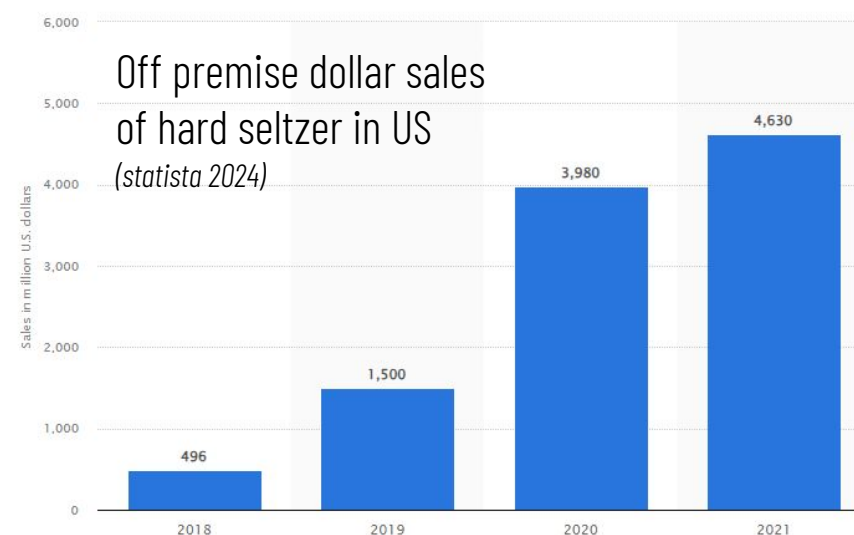
Impact





## White claw Launched in 2016 paving the way for an entirely new category

By July 2021, more than 150 brands launched lines of hard seltzer across the U.S. with global seltzer market expected to be 17.67 billion by 2025



Pre Challenger

Cultural context

Opportunity

Mainstream Vs Challenger

Impact

## FROM

Beer is the default  
for hanging with  
the guys

## TO

Even in traditionally  
masculine places where  
you'd expect everyone to  
be into beer, it's totally  
cool to go for lighter even  
fruit flavored option.



Category

# RAZOR

S

Vs

billie



## Pre Challenger Category Dynamics



### Smooth Expectations

The long held belief that for women, body hair not okay still prevails. With younger consumers questioning this expectation



### New subscription models

Brands launching with refillable subscription models are on the rise with the launch of men's shaving brand Harry's in 2013



### Locked up

Economic stratification leading to Theft in basic categories lead to retailers locking up product.

## PAIN POINTS

Razors refill model prices soar

Dull Blades ill equipped for coarse hair

Category is confusing, claims technology, razor head and handle compatibility

Pre Challenger

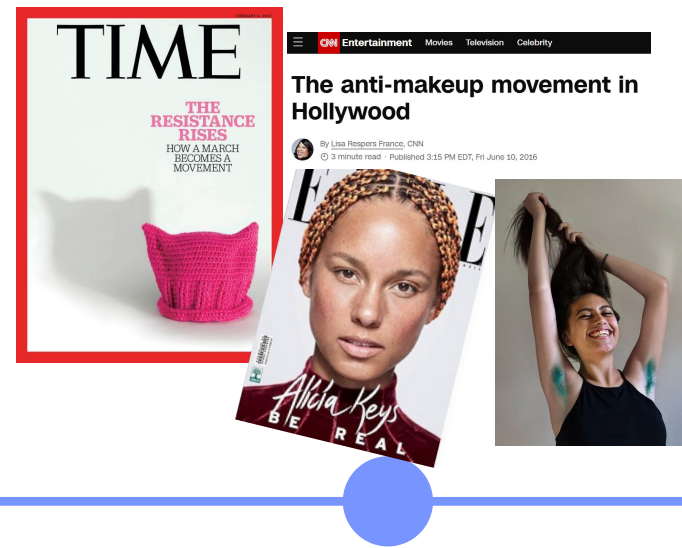
Cultural context

Opportunity

Principle

Impact

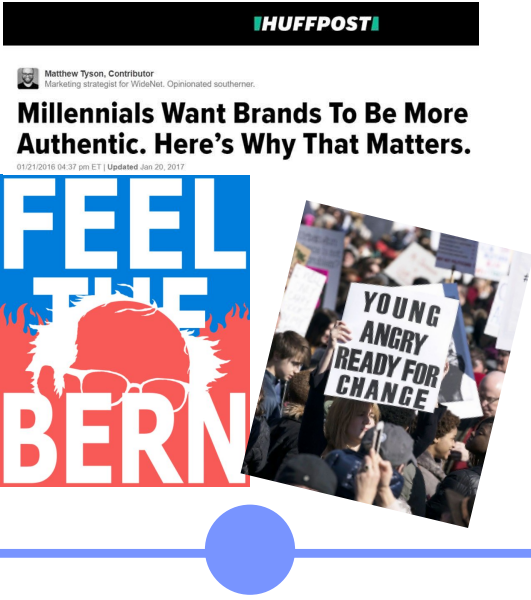
Billie Launched in 2017



New Wave feminism taking shape

The women's empowerment movement starts drumming up conversations around gender norms like shaving and makeup. Women's march in 2017 culminates on calls for bodily autonomy.

[Click here for more information](#)



Millennial culture calls for Authenticity

"This generation doesn't dislike brands. What they don't like is advertising," said Maker Studios' chief content officer, Erin McPherson. 90% of millennials say that brand authenticity is key when making purchasing decisions (Forbes 2016)

[Click here for more information](#)



Minimalism movement becomes mainstream

People seek simplicity and inspect the harms of over consumption. Some opt for more minimalist approach to living and consumption streamlining routines and design aesthetics

[Click here for more information](#)





Launched in 2017

Billie saw the category was missing

**An affordable and easy to use, inclusive body positive brand that makes it okay for women take control of their hair from head to toe.**

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|

## Billie's Challenger Brand Principles

4

**Say the quiet part  
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*What's traditionally  
considered Taboo can be  
empowering for people*

Humanification of Marketing

8

**Design is more  
than graphics!**

*Innovation should be  
driven by user  
experience*

Aesthetically Polarizing

Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs  
Mainstream

Impact

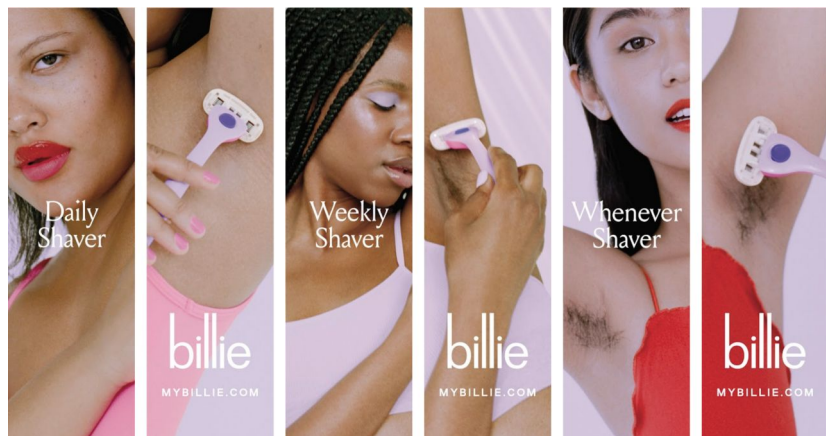
Humanification of Marketing PRINCIPLE: Say the quiet part out loud! What's traditionally considered Taboo can be empowering for people

**Billie used envelope pushing style of marketing to bring bold representation to the body hair conversation**

Their messaging focused on autonomy of women. Shaving whenever. However. If ever.



While mainstream brands focused on smoothness mainly on legs, close shaves and comfortability



Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs  
Mainstream

Impact



Aesthetically Polarizing PRINCIPLE: Design is more than graphics! Innovation should be driven by user experience



**Bille's focus on design, simplicity and value allowed it compete directly with leaders in the category**



Their Less but better approach highlighted the issues with other razors when shaving coarse hair and irritation. Stood out offering sleek designer crafted handle and durable stainless steel blades for a value.

Mainstream players often focused on tiered functional benefits with more blades, varying benefits with heads that often don't match handles





## After Billie's hair honesty the mainstream starts opening up

Brands start to focus on body hair "care" not just removal more conversations around body hair candor pop up across the marketplace.

**in 2021 Billie was acquired by Edgewell owner of Schick for \$310 Million**



Billie's **sales volume increased by 268%** year over year as of December 2019. Additionally, over the past three months, Billie has seen a **56% repeat purchase rate** (March 2020)

[Glossy.co](https://www.glossy.co)



| Pre Challenger | Cultural context | Opportunity | Mainstream Vs Challenger | Impact |
|----------------|------------------|-------------|--------------------------|--------|
|----------------|------------------|-------------|--------------------------|--------|



Category

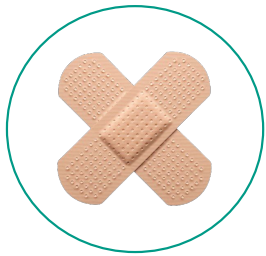
**BANDAGE  
S**

**Vs**

*welly*<sup>®</sup>



## Pre Challenger Category Dynamics



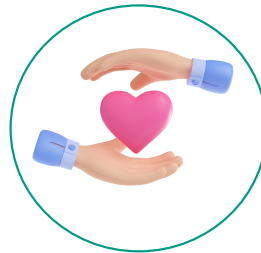
### **Bandages = Band-Aid**

Brand is category synonym. No other brands able to compete with mainstream brand.



### **Clinical Commodity**

Seen as a commodity, purely functional. Innovation based in not meaningful benefits



### **Cover & Care**

Made to blend in. All band aids were designed to blend into the skin and hide cuts/bruises. Has not evolved since inception

## **PAIN POINTS**

Hard to find

All about utility and lack of positive emotional connection

Boring. Excitement and enjoyment was only reserved for kids

Packaging not counter worthy or durable enough to withstand those bumpy and often bruising moments

**Pre Challenger**

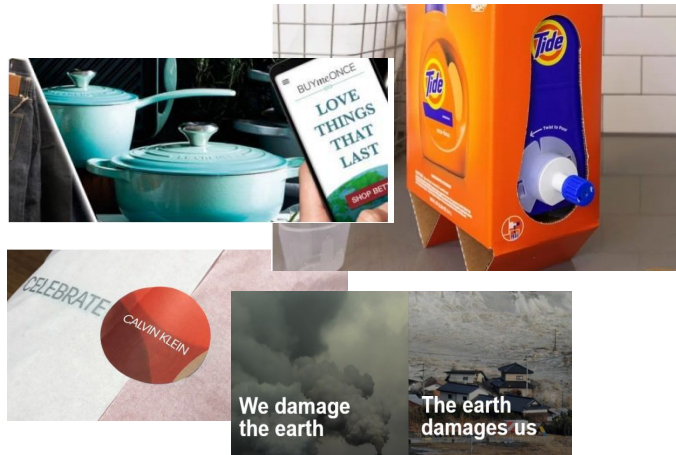
Cultural context

Opportunity

Principle

Impact

Welly Launched in 2019



GenZ Shapes culture with Expression

Labels should be chosen, not given, with identities being built based on a collection of intersectional attributes. Self expression as a form of individualism and uniqueness

[Click here for more information](#)

Millennials Enter parenthood

Millennial parents prioritize quality and novelty. Parents want to see their kids express themselves and give them freedom to choose what's right for them

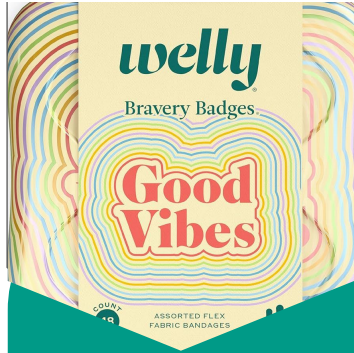
[Click here for more information](#)

Environmental Focus

As Millenials grow so do their environmental worries, after seeing oil spills, wildfires and contaminated drinking water across the US they are hyper focused on their families future.

[Click here for more information](#)

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural Context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|



Launched in 2019

Welly saw the category was missing

**Fun and happiness for everyone in times that often lead to tears.**





## Welly's Challenger Brand Principles

5

**If a 7 year old can't  
understand it  
we shouldn't be saying it.**

*Don't make people work hard,  
Marketing language is the  
enemy of clarity.*

Humanification of Marketing

7

**Use Design as a  
superpower**

*to emotionally connect  
with people in ways the  
category tends to  
overlook*

Aesthetically Polarizing

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

If a 7 year old can't understand it we shouldn't be saying it. Don't make people work hard, Marketing language is the enemy of clarity.

We are proud to be B Corp Certified



**Welly used human language like “bravery bandages” to describe a category that has historically had clinical focused utility based benefits**

Handy, Dandy Human Body Fixer Uppers.



The mainstream focused on specific benefits using arbitrary claims like “60% more healing & 50% more stretchable”



Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

Impact

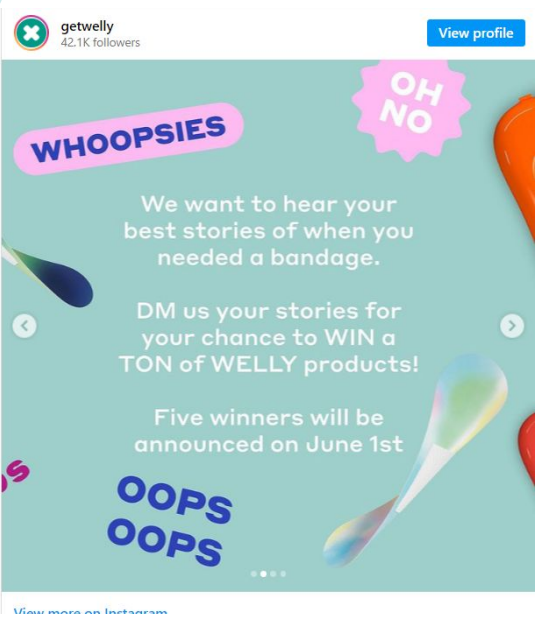
If a 7 year old can't understand it we shouldn't be saying it. Don't make people work hard, Marketing language is the enemy of clarity.

Welly brought on the fun using UGC content to leaned in to scrapes and cuts as “happy accidents” encouraging people to wear them as badge of honor

When bandages look this good you don't mind getting hurt



Band-aid brand focused on functionality and durability with benefits like waterproof & 4 sided seals.



|                |                  |             |                                       |        |
|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|



Use Design as a superpower to emotionally connect with people in ways the category tends to overlook

**Welly helped parents who had a hard time finding bandages when they urgently needed, paper boxes tended to bend, break and fall apart.**

Providing sustainability & functional benefits without using traditionally eco friendly cues



Flex fabric bandages designed to stay on through play time



Designs and sizes the whole family will wear



Durable, stackable, reusable tin packaging keeps your supplies easy to locate and store



The Category leader split the category in 2, Kids & Adult. Focusing on licenses to keep kids smiling and advance technological language to premiumize with adults. All in paper packaging

Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

Impact



The 100 year old Brand Band-aid owned by J&J has yet respond to Welly's sugrence, while other bandage brands hoping to capture market growth have emerged.

**Welly's exclusive year in Target generated \$10 Million in sales.**

**It's success has led to kids and parents alike expecting more excitement in the bandage category**

Welly was eventually acquired by Unilever in February 2022 expanding into other wellness categories since its acquisition.



|                |                  |             |           |  |        |  |
|----------------|------------------|-------------|-----------|--|--------|--|
| Pre Challenger | Cultural context | Opportunity | Principle |  | Impact |  |
|----------------|------------------|-------------|-----------|--|--------|--|



**FROM**

Bandages as a  
form of healing and  
covering up

**TO**

Bandages as a form  
of self expression of a  
life well lived

Category

# Wate



## Liquid Death



## Pre Challenger Category Dynamics



### Same Same but.. Also Same

A new water brand pops up every day prices are going up but almost no differentiation in the market



### Hydrate or diedrate

In 2017 bottled water sales grew 8.8% While Carbonated soft drinks sales declined for the 13th consecutive year.



### Liquid Controversy

BPA free is still a topic of conversation while Nestle in hot water around its sourcing practices. Water brands come under scrutiny

## PAIN POINTS

Brands look the same, water is a utility little to no emotional connection

Hard to differentiate the quality of water

Plastic bottles are a high contributor of waste and often not recycled

Pre Challenger

Cultural context

Opportunity

Principle

Impact

Liquid Death Launched in 2019



The Plastic Problem

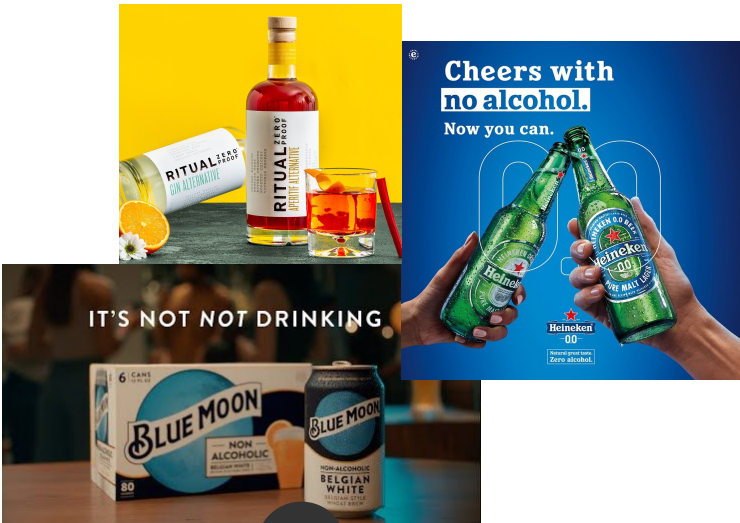
In 2018 53% of americans considered themselves environmentalists.

[Click here for more information](#)



Workout culture booms

Health & fitness trackers, smartwatches and other wearables will be the number one fitness trend in 2019, (ACSM Health & Fitness Journal)



Younger generations less likely to binge drinking compared to previous years

Alcohol consumption declining with younger people. Fewer young drinkers 2023 (22%) than in the 2000s or 2010s (28%) report they sometimes drink “more than they think they should.”

[Gallup August 2023](#)  
[Bloomberg UK March 2023](#)  
[Click here for more information](#)

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural Context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|

[Click here for more information](#)



Launched in 2019

Liquid Death saw the category was missing

**A plastic free single use water brand that makes it cool to drink water.**

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|



# Liquid Death's Challenger Brand Principles

7

## Use Design as a superpower

*to emotionally connect with people in ways the category tends to overlook*

Aesthetically Polarizing

4

## Say the quiet part out loud!

*What's traditionally considered Taboo can be empowering for people too.*

6

## Mass Market is not always the First step it's often the last.

*Build your innovation within your target audience first to create congregation around your product*

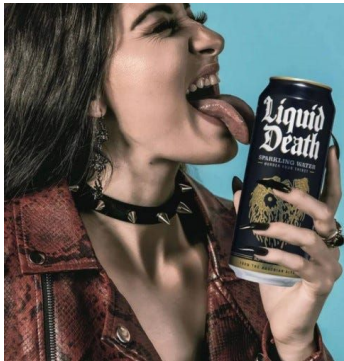
Humanification of Marketing

|                |                  |             |                                                 |        |
|----------------|------------------|-------------|-------------------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | <b>Principle</b><br>Challenger vs<br>Mainstream | Impact |
|----------------|------------------|-------------|-------------------------------------------------|--------|

Aesthetically Polarizing PRINCIPLE: Use Design as a superpower to emotionally connect with people in ways the category tends to overlook



**Liquid death inspired by Vans Warped tour borrowed from Punk/Goth aesthetics to stand out from everyday water brands infused it's edgy dark humor and sustainability message into an every part of its product**



Most Mainstream waterbrands look almost exactly the same with clear plastic bottles and varying shades of blue.

|                |                  |             |                                                 |        |
|----------------|------------------|-------------|-------------------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | <b>Principle</b><br>Challenger vs<br>Mainstream | Impact |
|----------------|------------------|-------------|-------------------------------------------------|--------|

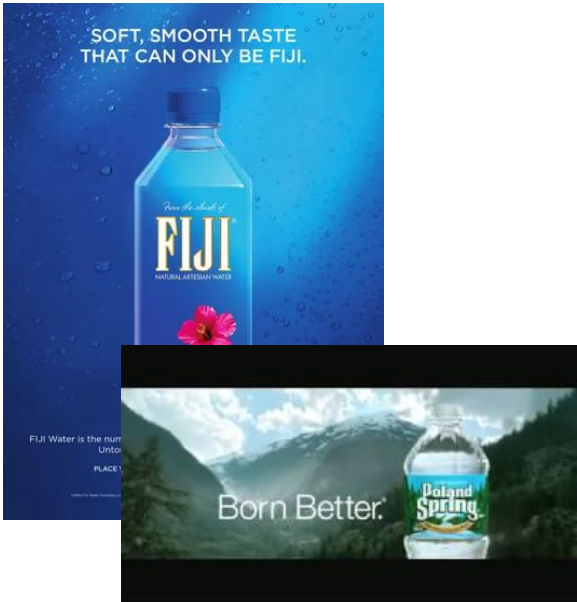
Humanification of Marketing PRINCIPLE: Say the quiet part out loud! What's traditionally considered Taboo can be empowering for people



**Liquid Death leaned into the anti establishment feelings and unapologetically rebellious nature of people in its target audience**



@Rin-qj7zt 3 years ago  
Okay, I don't mind commercials when they are as entertaining as this lol  
1.5K   Reply



Mainstream players competing solely on taste and price with imagery of waterfalls and islands while tacking on sustainability as an “add on” rather than an ethos.

creating a brand that makes people want to drink water and feel like a rebel doing it.

|                |                  |             |                                                 |        |
|----------------|------------------|-------------|-------------------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | <b>Principle</b><br>Challenger vs<br>Mainstream | Impact |
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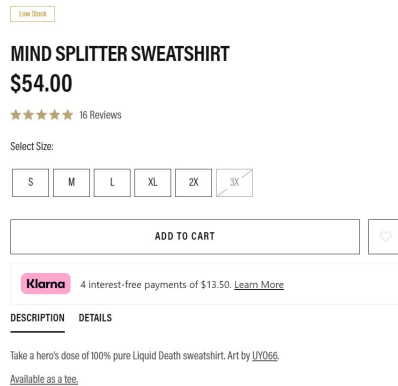


Mass /Brick and Mortar is not the answer every time. Build your innovation within your target audience first to create a congregation around your product

**Liquid death went beyond product attributes and opted to create community around its product. Using language and other ways to consume its message and ethos**



While the brand started online they began selling in bars, tattoo parlors and barber shops then expanded to whole foods and 7-eleven. Finally entered into an exclusive deal with live nation



Pre Challenger

Cultural context

Opportunity

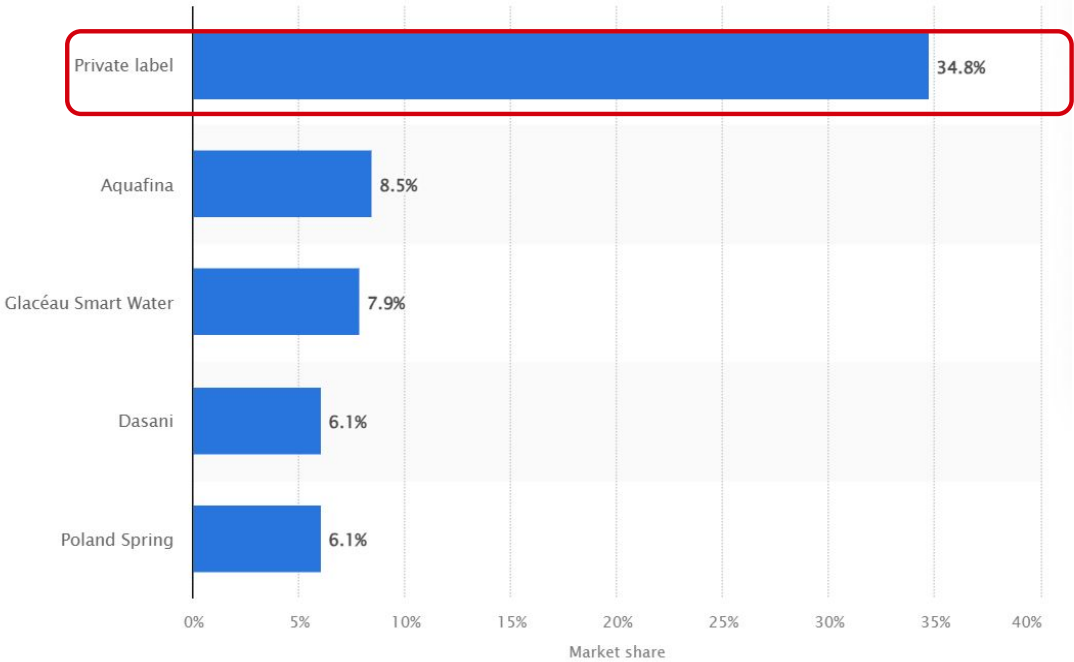
**Principle**  
Challenger vs Mainstream

Impact

Liquid death differentiated itself on shelf and in the hands of people  
Offering a new take on water and giving rise to differentiated and more sustainable options in the water category.



Market share of leading bottled still water USA 2023  
Statista (2023)



|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|



**FROM**

Water as a  
commodity

**TO**

Water as a  
Lifestyle

Category

# Deodorant



Pre Challenger

## Category Dynamics



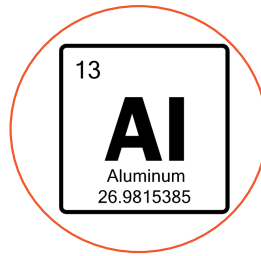
### All about Armpits

Deodorizing is limited to the underarm some brands focus on chafing but not much innovation beyond that



### Natural Deo on the rise

Native deodorant launch aluminum free claims catch fire with the mainstream.



### More hours more Aluminum

Claims are rising from 24 to 48 even some clinical formulas touting 72 hour protection but all with more concentration of aluminum

## PAIN POINTS

Some don't want aluminum but want long lasting protection

Natural deodorants struggle to work

Some experience uncomfortable smells on other parts of their body and shower more than 3x a day

Irritation issues resulting in rashes and itchiness

Pre Challenger

Cultural context

Opportunity

Principle

Impact

Lume Launched in 2016



NON TOXIC



PARABEN FREE



GLUTEN FREE



VEGAN



SUSTAINABLE



ORGANIC

BUSINESS

**Wal-Mart aims to push organic foods into mainstream**

By CHICAGO TRIBUNE | Chicago Tribune  
PUBLISHED: April 10, 2014 at 1:00 a.m. | UPDATED: August 25, 2021 at 3:51 a.m.



Natural is mainstream

People want more transparency in what they buy. Health, safety and sustainability expectations are growing while new natural brands launch across categories in Mass

[Click here for more information](#)

Open conversations about women's health

Fertility, sexual health, menopause, pregnancy talking about reality of motherhood

[Click here for more information](#)

People Talk Patriarchy

Feminism conversations continue to build momentum with topics like toxic masculinity & privilege are discussed.

. "cultural distaste for The Patriarchy is perhaps at an all-time high" - Vanity Fair (2014)  
[Click here for more information](#)





Launched in 2016

Lumē saw the category was missing

**A product that keeps you safe from  
unwanted odor, chemicals, and irritation  
Everywhere & Everywhen**

Pre Challenger

Cultural context

**Opportunity**

Principle

Impact



# Lume's Challenger Brand Principles

1

## **Break from the convention of today**

*Don't be afraid to pioneer based on changing norms in society*

2

## **Innovate on the fringes**

*to uncover deeper burning pain-points that will be in service of everyone*

User Obsession

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

USER OBSESSION: Break from the convention of today. Don't be afraid to pioneer based on changing norms in society

**Lume leaned into uncomfortable conversations that come with odor from "down under"**

Using the founders background as a Gyno to have real honest conversations with people



The Mainstream main focus was on the underarm highlighting, moisturization, brightening, dryness and sweat.



Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

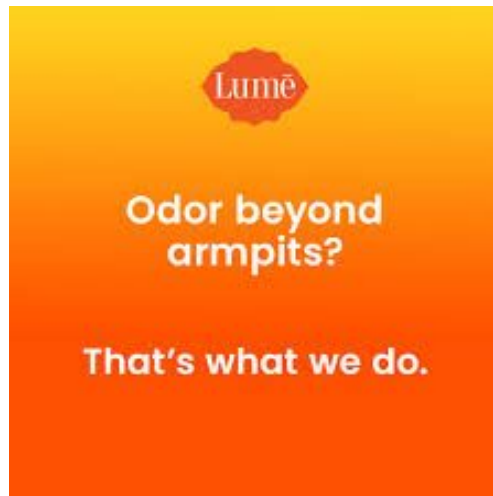
Impact

User obsession PRINCIPLE: Innovate on the fringes to uncover deeper burning pain-points that will be in service of everyone



Lumē leaned into science & expert backed superiority and went beyond the traditional category benefits with a cheeky twist

**Lumē found some people showering more than 3x a day and knew the problem was beyond the pits**

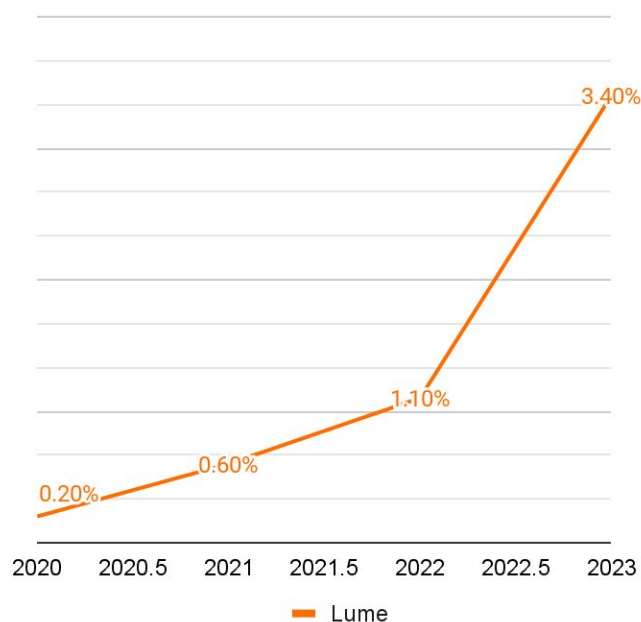


The mainstream focused on premiumizing with clinical level protection with formulas increasing aluminum concentration combatting the downsides of texture and feel that come with it

|                |                  |             |                                       |        |
|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|

## Lume deodorant HH Penetration

Numerator 2020 -2023



**In the year after Lume launched in Target driving almost 200% HH penetration growth YOY.**

Since launch other mainstream brands are following the pits to privates playbook



Pre Challenger

Cultural context

Opportunity

Mainstream Vs Challenger

Impact

**FROM**

Showering more than  
3 times a day and  
being uncomfortably  
icky

**TO**

The freedom of feeling  
fresh anytime  
anywhere  
(even down there)



Category

# CEREAL

# L

vs

# MAGIC SPOON<sup>TM</sup>

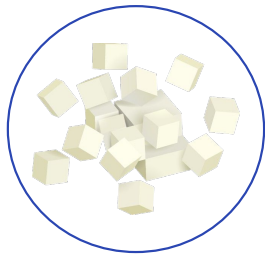


## Pre Challenger Category Dynamics



### Fun Cereals are Made for Kids

Cereal isles were dominated by cute characters and bright colors. But Trix are (only) for kids



### Sugar Shock

Parents get wise to cereal companies marketing to their kids exposing the industry's sugary secret.



### Redefining breakfast

The on the go american lifestyle forgos breakfast according to Kelloggs Survey Only 34% of American adults eat breakfast everyday

## PAIN POINTS

It's difficult to find time in busy schedules for a healthy breakfast

Breakfast Cereal options for adults are boring or laden with sugar and empty calories

People suffering from diabetes often have to leave the category

Pre Challenger

Cultural context

Opportunity

Principle

Impact

Magic Spoon Launched in 2019



America leads in Obesity and Type 2 Diabetes

Based on CDC reports estimates for total diabetes were 10.3% in 2001–2004 and 13.2% in 2017–2020. The age-adjusted prevalence of obesity among U.S. adults was 42.4% in 2017–2018.

Paleo, Keto, fasting, Whole30 Oh My!

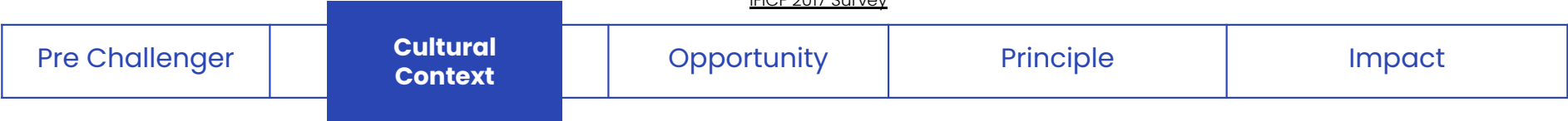
Americans following a specific diet doubled 14% in 2017 to 36% in 2018. According to Survey<sup>1</sup> people felt sugar was the top culprit of weight gain

<sup>1</sup>I<sup>1</sup>FICF 2017 Survey

Sugar is the enemy as Self-care evolves

America starts to peel back the anti sugar sentiment replacing it with a focus on moderation. According to study<sup>1</sup> indulgence sometimes is as fundamental to a happy life as self control

<sup>1</sup>Beyond Self Control





Launched in 2019

Magic Spoon saw the category was missing

**A healthier fun cereal for adults that tastes just as good as you remember it growing up**

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|

# Magic Spoon's Challenger Brand Principles

2

## Innovate on the fringes

*to uncover deeper burning pain-points that will be in service of everyone*

User Obsession

6

## Mass Market is not always the First step it's often the last.

*Build your innovation within your target audience first to create congregation around your product*

Humanification of Marketing

Pre Challenger

Cultural context

Opportunity

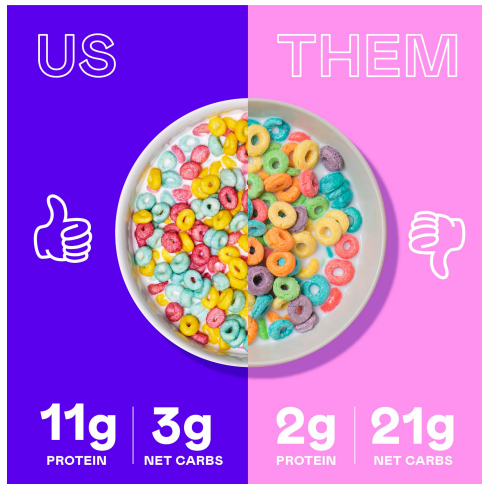
**Principle**

Challenger vs Mainstream

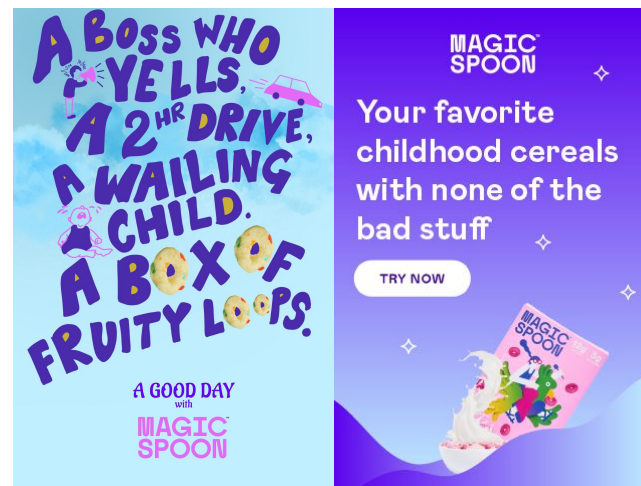
Impact



User Obsession PRINCIPLE: Innovate on the fringes to uncover deeper burning pain-points that will be in service of everyone



**Magic spoon** leveraged nostalgia and innovated for people suffering with diabetes to unlock an experience everyone would enjoy. No Guilt Guaranteed



They Made it so you could have your cereal and eat it too! With High quality ingredients that are high in protein, low in sugar, keto friendly and Grain free without compromising on taste.

Mainstream had a clear line by age. For kids adding more & more sugary varieties vs adults only pure health food



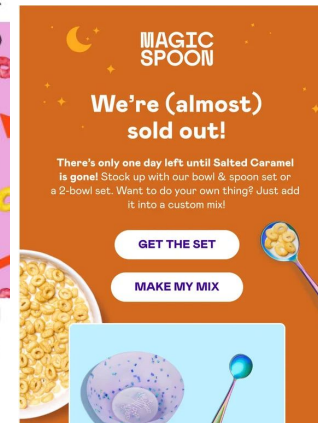
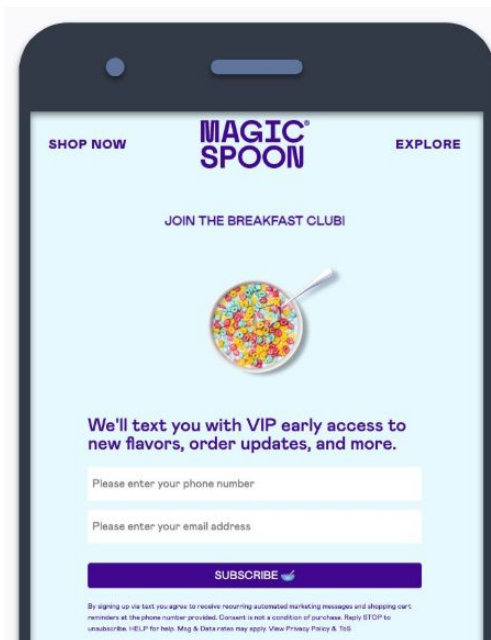
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|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|

Humanification of Marketing PRINCIPLE: Mass /Brick and Mortar is not the answer every time. Build your innovation within your target audience first to create a congregation around your product

**Starting on DTC, Driving discovery with new rotating flavors and exclusive drops through different channels like podcasts and insta worthy buzzy partnerships.**



**Magic Spoon refers to their consumers as spoon(ers),** and the brand consistently reposts UGC via Instagram stories, creating a sense of community.



Pre Challenger

Cultural context

Opportunity

**Principle**  
Challenger vs Mainstream

Impact





By 2021 approximately  
20% of cereal and  
breakfast foods now  
contain protein claims

NIQ Label insights (Feb 2021)

After Magic Spoon's launch in 2019 the DTC brand amassed an online community of more than 1 million people.

4 years later Magic Spoon expanded to more than 6,800 stores nationwide (*Target, walmart, Costco, Kroger etc*) Brands mimicking the innovation enter the market not soon after.



Pre Challenger

Cultural context

Opportunity

Mainstream Vs Challenger

IMPACT

## FROM

All fun & delicious  
cereal is sugary,  
unhealthy and off  
limits of adults

## TO

You can have the  
cereals you crave and  
eat it too!  
Without the guilt

Category

# Yogurt + Chobani®





Pre Challenger

## Category Dynamics



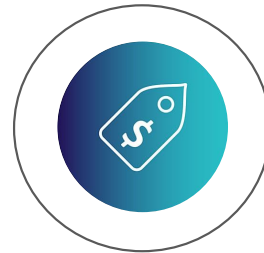
### **Yogurt-women dominated category**

Yogurt brands targeted to women mostly



### **Products high in sugar & additives**

Conventional yogurt with preservatives & artificial flavors



### **Greek Yogurt: Lack of Awareness & distribution**

Greek only available specialty stores and often at a premium price

## **PAIN POINTS**

The healthy Yogurt options bringing health but not tasty

The overall Yogurt brands, lacking health benefits - very sugary

Mainstream cup package, makes difficult to reach it until the last drop

**Pre Challenger**

Cultural context

Opportunity

Principle

Impact

# Chobani Launched in 2007



## Shift towards healthy & conscious eating

Eating more fermented food seen as a way to improve health and wellbeing

[Click here for more information](#)

## Protein-obsessed environment

Protein-obsessed environment with demands for meal replacement bars

[Click here for more information](#)

## Photo based social Media influencing health behavior

People start to think more about how they look, because they were more often sharing pictures on social media (FB at the time)

[Click here for more information](#)





Launched in 2007

Chobani saw the category was missing

**A nutritious & tasty yogurt recipe that's more natural, higher in protein, lower in sugar and carbs that everyone can enjoy**

Pre Challenger

Cultural context

Opportunity

Principle

Impact

## Chobani's Challenger Brand Principles

2

### **Innovate on the fringes**

*to uncover deeper burning pain-points that will be in service of everyone*

User Obsession

8

### **Design is more than graphics!**

*Innovation should be driven by user experience*

Aesthetically Polarizing

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

User Obsession PRINCIPLE: Innovate on the fringes to uncover deeper burning pain-points that will be in service of everyone



The ads were targeted mostly to women & focused on diet. Mainstream players were engaged on winning share points via new flavor, probiotics & fat free.

**Chobani** looked for people who were seeking for a healthier yogurt option and needed something quick, easy and tasty



Protein & Naturals interest

Chobani has overturned long held prejudices about the American palate. Big companies pushed sugary, unhealthy & processed food into grocery stores.

Chobani identified the unmet need of protein & for naturalness & addressed it by using Greek yogurt. Greek yogurt offers a lot of protein without much cholesterol & carbs & has a milder taste. Chobani figured it out that if they made it thicker, people would like it better & they did it without adding sugar

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact



Aesthetically Polarizing PRINCIPLE: Design is more than graphics! Innovation should be driven by user experience



The general category design and packaging looked very similar and targeted for Women using feminine driven cues

**Chobani** offered a product that had a distinct value proposition, a unique & functional package design

The cup was shorter & fatter than the regular yogurt container and displayed vivid colors. That provided a symbol of the new subcategory that helped customers recognize which option was Greek.



Revolutionized the yogurt industry by putting the product in the dairy section, focusing on Greek yogurt, natural ingredients, with a new brand identity & packaging

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

**Greek yogurt was 1% of the yogurt market in 2007 – 44% in 2013. As of 2022, U.S. yogurt sales came to over 7.2 billion U.S. dollars. In the previous year, Greek yogurt accounted for approximately 51 percent of U.S. yogurt sales.**



Suddenly, Icelandic, Australian, and French yogurts were crowding grocery aisles, marketing themselves as more curated choices for food lovers. Most recently is the introduction of plant-based alternatives.

## **Current Yogurt shelf for everyone!**

Late 2013, a high-protein Greek yogurt brand called Powerful Yogurt emerged, becoming the first brand to market itself as yogurt for men.



Pre Challenger

Cultural context

Opportunity

Mainstream Vs Challenger

Impact

**FROM**

Yogurt as a  
snack/treat

**TO**

Greek yogurt as a  
complete meal



Category

# HYDRATION

VS



**LIQUID IV.**  
*Fueling Life's Adventures*



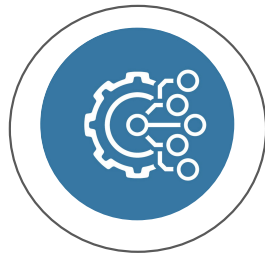
## Pre Challenger Category Dynamics



### Hydration for specific usage Occasions

Pedialyte offering  
hydration for sick kids

Gatorade offering  
hydration for sports  
enthusiasts



### Hydration only available in Liquid Form

Technology behind new  
forms not mainstream  
yet



### Water is not enough

75% of Americans are  
chronically dehydrated,  
consumers unaware of  
the importance of  
hydration

## PAIN POINTS

No faster & effective  
method of hydration due  
to absence of electrolytes

Sports drinks filled with  
artificial dyes and  
preservative ingredients -  
Natural rapid hydration  
only offered for kids

Pre Challenger

Cultural context

Opportunity

Principle

Impact



# Liquid IV launched in 2012



## The Plastic Problem

In 2010, 8 MM Metric tons of plastic goes into the Ocean = 90 aircraft carriers, and the problem continues to grow.



## Health & wellness

Focus on health & overall wellness, sustainability in products, organic without artificial colors & preservatives

[Click here for more information](#)



## American Binge Drinking lifestyle

According to National Institute of Health, 18.3% of Americans were binge drinkers in 2012, up from 9% in 2005

[Click here for more information.](#)

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural Context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|



Launched in 2012

BRAND saw the category was missing

**Functional & simple product that hydrates more rapidly than water alone, combining science, flavor & sustainability**

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|

## Liquid IV Challenger Brand Principles

3

### **Treat People as innovators**

*Understand & activate on how people are using your products, not just how you want them to use it*

User Obsession

5

**If a 7 year old can't understand it we shouldn't be saying it**

Don't make people work hard,  
Marketing language is the enemy of clarity.

Humanification of Marketing

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

USER OBSESSION: Understand & activate on how people are using your products, not just how you want them to use it

**Liquid IV has successfully woven a narrative that transcends the functional benefits of its products.**

*Aligned with people concerns, Liquid IV has positioned itself as more than just a product – a lifestyle choice.*



Liquid I.V. "Fuel Your Play": showing variety of usage occasions, different activities, different locations & target diversity

Liquid I.V. fostering the word of mouth created by people on social media around Hangover Cure – leveraging how some people are using it!



Pre Challenger

Cultural context

Opportunity

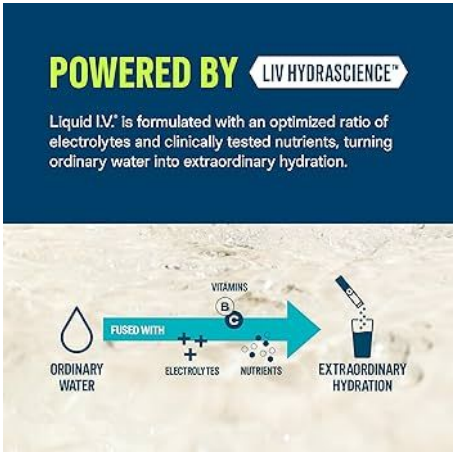
**Principle**

Challenger vs Mainstream

Impact

HUMANIFICATION OF MARKET: If a 7 year old can't understand it we shouldn't be saying it. Don't make people work hard, Marketing language is the enemy of clarity.

Liquid IV campaign reflects the brand's passion to help everyone to live healthier. A very clear messaging across different touchpoints

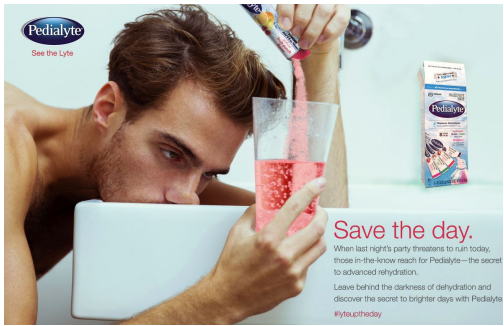
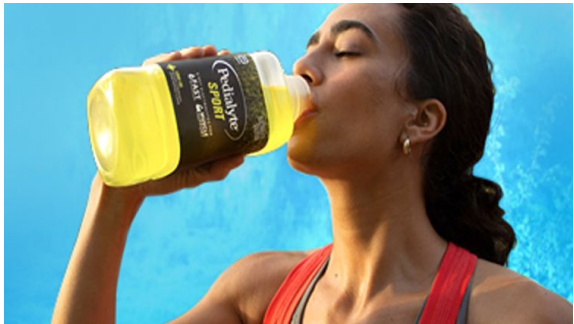


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|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|



## Liquid I.V. Takes Hydration Beyond Sports – and moves the market with it!

The water enhancer market is forecast to reach \$4 billion by 2032 with a variety of new competitors entering



Pedialyte primarily targeted towards infants and children, expanded its communication: **In 2015, one-third of Pedialyte sales came from adult use**, a growth of 57% since 2012.



News

### Unilever invests in production of Liquid IV beverage brand

“Securing supply chain resiliency for Liquid IV is a key factor in continuing to drive growth for the brand” – Unilever.

Conor Reynolds | March 6, 2024

|                |                  |             |                          |        |
|----------------|------------------|-------------|--------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Mainstream Vs Challenger | Impact |
|----------------|------------------|-------------|--------------------------|--------|

**FROM**

Hydration solution  
for specific usage  
Occasions

**TO**

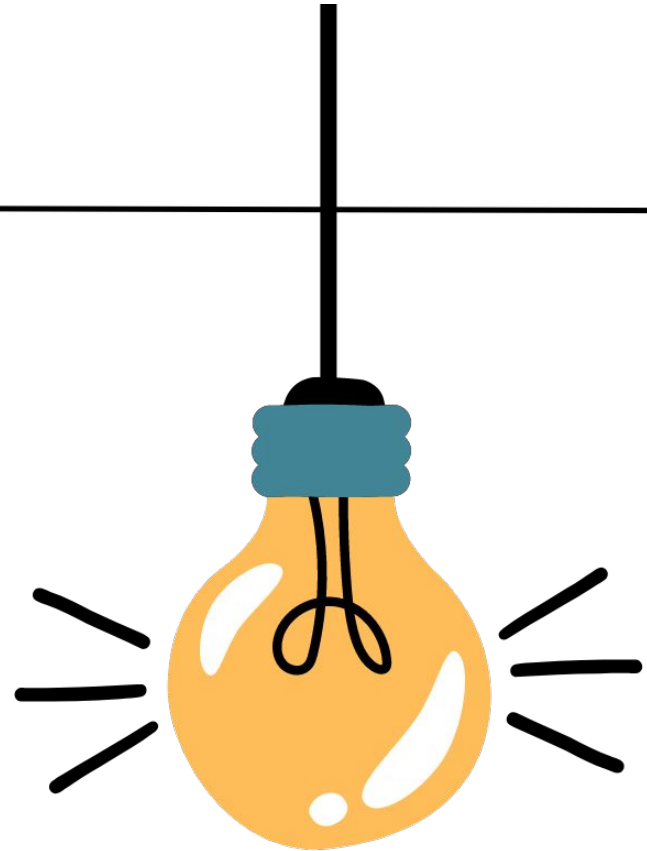
Everyday Rapid  
Hydration For Everyone

# WHAT IF WE...

---



always required a highly trained industrial designer to judge our new H2/H3 launches to help us connect our positioning to the actual experience of our products.



Category

# MILK

Vs

THE ORIGINAL

# OATLY!



Pre Challenger

## Category Dynamics



### Lactose intolerant

68% of the world is estimated to be lactose intolerant



### People questioning the health benefits of Milk

Hormones & Inflammatory effects present on dairy



### Dominance of soy and Almonds milk

These were the primary plant-based options.

## PAIN POINTS

Lactose intolerance, concerns about hormones & antibiotics in conventional milk

Ethical or environmental issues related to dairy farming

Pre Challenger

Cultural context

Opportunity

Principle

Impact



# Oatly launched in 2015

**BASKETBALL**

- Chris Paul
- Dwight Howard
- Cade Cunningham
- Spencer Dinwiddie
- Wilson Chandler
- Samuel L. Jackson
- Jabari McGray

**MAJORITY AMERICAN FOOTBALL**

- The Tennessee Titans
- Tom Brady
- Curtis Mayfield
- Andre Patton

**OLYMPIANS & WORLD CHAMPIONS**

- Benjamin Parry, Olympic Weightlifter
- Venus Williams, Women's Tennis World Champion
- Patrick Babarinsa, World Record Holding Strongman
- Heather Mills, Paralympic Sprinter
- Liam Neeson, Formula One World Champion
- Dustin Beason, Olympic Cyclist

**PLANT-BASED CELEBRITIES**

- Blake Lively
- Natalie Portman
- Rebecca
- Uzo Aduba
- Julianne Moore
- Adam P. Sandler
- Carrie Underwood
- Sam Claflin
- James Van Der Beek
- Wendy Williams
- Madison Pettis

**A Global Increase in VEGANISM & PLANT-BASED EATING**

More and more people — whether they identify as — **vegan** **vegetarian** **plant-based** **flexitarian** **omnivore** are **CHOOSING** to incorporate **VEGAN & PLANT-BASED MEALS**

**A global reduction in meat consumption could save 8 MILLION lives per year**  
**\$31 TRILLION** in health care and climate change costs  
**THE PLANET**

**vegan meals on Fridays**

The US' largest public school system — in New York City — started serving only **vegan meals on Fridays**

Vegan Leaders in Corporate Management (VLCM) has helped larger corporations achieve **plant-based initiatives** including Fortune 500 companies like:

- Amazon
- Bank of America
- Black & Veatch
- Boeing
- Google
- Target
- Microsoft
- General Motors
- Facebook
- Wells Fargo
- Verizon
- Coca-Cola
- American Airlines

**Major fast food restaurants that carry Beyond Meat's Impossible Foods products**

- Burger King
- McDonald's
- Pizza Hut
- Black & Tan
- Del Taco
- Carl's Jr.
- White Castle
- Wendy's
- Chick-fil-A
- KFC

**17%** increase in vegan food delivery orders during the COVID-19 pandemic  
**five-fold** increase in plant-based food sales by 2030



**UNITED NATIONS FOUNDATION**

**Climasphere**

**The Paris Agreement: 101**

On April 22nd — Earth Day — leaders representing more than 190 countries will gather at the United Nations in New York to sign the Paris Agreement on climate change. The event is expected to be the largest single-day signing in the history of international accords. But what does it all mean?

**THE AGREEMENT: IN 3 STEPS**

- Adoption by negotiators at COP21**  
December 2015
- Signing ceremony at UN headquarters**  
April 23, 2016
- Joining on at the national level by 118 countries representing 85% of the world's emissions**  
Only 180

## Better for me

People more aware of what is good for their body, redefining health & food culture. Growing veganism too

[Click here for more information](#)

## Better for Animals

Rising veganism and awareness of the impact of meat consumption are driving demand for meat-free products substitutes

[Click here for more information](#)

## Better for the environment

196 countries for a climate change agreement to keep global warming below 2 degree celsius

[Click here for more information](#)





Re-Launched in 2015

Oatly saw the category was missing

**Healthier & Nutritious more  
environmentally-sustainable alternative to cow  
milk that still tastes like milk.**

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|

# Oatly Challenger Brand Principles

2

## Innovate on the fringes

*to uncover deeper burning pain-points that will be in service of everyone*

User Obsession

6

## Mass Market is not always the First step it's often the last.

*Build your innovation within your target audience first to create congregation around your product*

Humanification of Marketing

7

## Use Design as a superpower

*to emotionally connect with people in ways the category tends to overlook*

Aesthetically Polarizing

Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

USER OBSESSION: Innovate on the fringes to uncover deeper burning pain-points that will be in service of everyone

*wow no cow!*



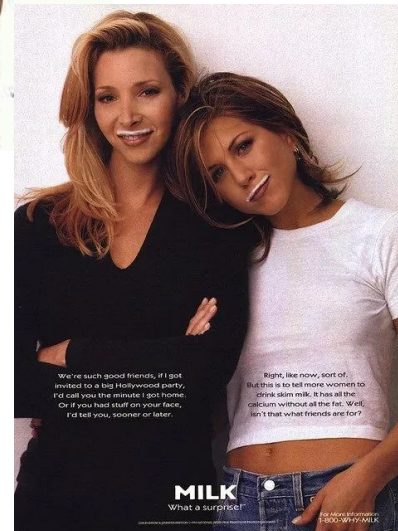
Oatly identified the user experience issues of alternative milks and acts against it



Oatly has been dedicated to helping the planet with a more than palatable plant-based alternative to dairy milk.



And created a tasty & exciting product that meet the needs of a growing market of lactose intolerant & eco-conscious consumer



Pre Challenger

Cultural context

Opportunity

Principle

Challenger vs Mainstream

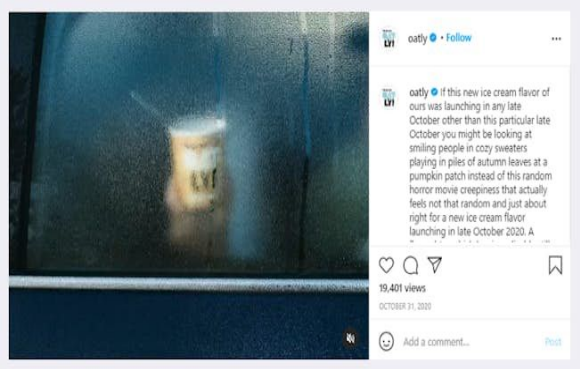
Impact

HUMANIFICATION OF MARKETING: Mass /Brick and Mortar is not the answer every time. Build your innovation within your target audience first to create congregation around your product



Oatly uses the ad space creatively to make fun of all the large corporations that run traditional & stale marketing campaigns

**Oatly made alternative option available everywhere, really being present across people journey.**  
Launched first in cafe's, where patrons were more likely to seek an alternative to dairy then moved to mass



Oatly knows its audience inside-out and as such creates messaging that strikes a personal chord with its audience across just about every touchpoint imaginable.

|                |                  |             |                                       |        |
|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|



**In 2018, 2 years after introducing themselves to the US market, oat milk sales cumulated to \$6 million. One year later, they were at \$40 million.**

The surge in demand for oat milk and other 'free-from' food and beverages in recent years has expanded the offerings on supermarket and café shelves.

Plant based dairy brands branching out into categories



**In 2023, market research firm Data Bridge forecasted the North American plant-based milk market will be worth more than \$10.8 billion by 2030.**



Pre Challenger

Cultural context

Opportunity

Mainstream Vs Challenger

Impact

AESTHETICALLY POLIRIZING: Use Design as a superpower to emotionally connect with people in ways the category tends to overlook



**In a sea of brightly colored dairy box design, Oatly came with a BOLD pack, engaging language, tone of voice, unique, authentic & humorous tone of voice, literally talking to people.**

Packaging as Oatly's main media channel,  
as way to have a dialogue with their users.



Using design, Oatly managed to communicate that their product was a solid alternative for baristas and challenged the milk industry to show their sustainability chops



|                |                  |             |                                              |        |
|----------------|------------------|-------------|----------------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | <b>Principle</b><br>Challenger vs Mainstream | Impact |
|                |                  |             |                                              |        |

**FROM**

A typical dairy milk  
product

**TO**

A healthy, tasty & fun  
milk alternative



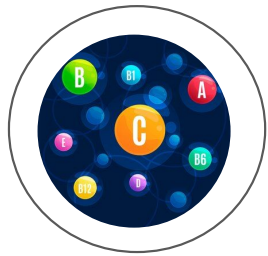
Category

# VITAMIN S

**OLLY**®



## Pre Challenger Category Dynamics



### Focus on the ingredients

Emphasis on the ingredients, rather than on benefits



### All bottles look the same, no differentiation

The vitamin aisle was lined with similar round bottles, with dull, bland packaging



### People questioning the quality of drugstore supplements

No brands in the nutritional supplement aisle that resonated with consumers as "better for you"

## PAIN POINTS

People not aware of ingredients vs benefits

Messy journey:

- Daily vitamins as a confusing chore
- Confusion & pressure in people who do not know where to start in their wellness journeys

Vitamins available only in the form of pills

Tasty chewable options for kids, not good for adults

Pre Challenger

Cultural context

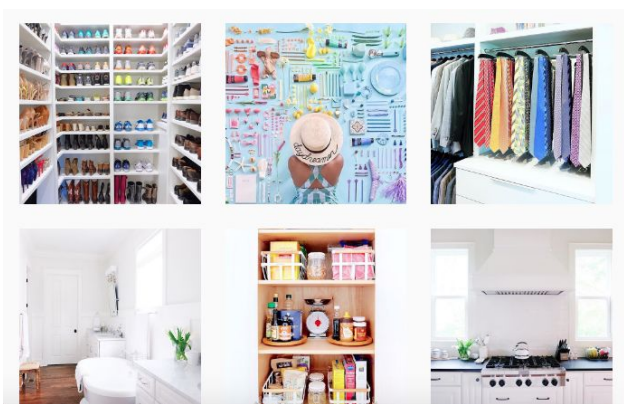
Opportunity

Principle

Impact



Olly Launched in 2015



Wellness mindset

The desire for a “healthy” lifestyle bypassed trend status and now firmly established as part of a larger, sweeping cultural movement

[Click here for more information.](#)

Rise of everyday items with expectation of counter-worthiness

People looking for support in organizing their lives – Influenced by social media & instagramable organized lifestyle: the way things look matters to people

[Click here for more information](#)

Self care through beauty supplements

Next gen pills & powders to inspire to be a better you

|                |                  |             |           |        |
|----------------|------------------|-------------|-----------|--------|
| Pre Challenger | Cultural Context | Opportunity | Principle | Impact |
|----------------|------------------|-------------|-----------|--------|



Launched in 2015

BRAND saw the category was missing

Supplements focusing on clear benefits rather than pure ingredients & science, matched with a tasty, fun & easy to use experience



5

**If a 7 year old can't  
understand it we  
shouldn't be saying it.**

Don't make people work hard, Marketing  
language is the enemy of clarity

Humanification of Marketing

8

**Design is more  
than graphics!**

Innovation should be  
driven by user experience

Aesthetically Polarizing

Pre Challenger

Cultural context

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**Principle**

Challenger vs Mainstream

Impact

HUMANIFICATION OF MARKETING: If a 7 year old can't understand it we shouldn't be saying it. Don't make people work hard, Marketing language is the enemy of clarity.



The mainstream focus on the ingredients



Olly made nutrition health journey fun & easy, understanding people journeys and clearly communicating the benefits people are looking for



Pre Challenger

Cultural context

Opportunity

**Principle**

Challenger vs Mainstream

Impact

AESTHETICALLY POLARIZING: Design is more than graphics! Innovation should be driven by user experience



**Olly created a strong brand, with a playful brand design & experience:** An easy to open square, easy to find and to store



|                |                  |             |                                       |        |
|----------------|------------------|-------------|---------------------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Principle<br>Challenger vs Mainstream | Impact |
|----------------|------------------|-------------|---------------------------------------|--------|





Source: Gummy Vitamins Market Research 2032 study, Allied Market Research

Gummy Vitamins on the rise!

Gummies have become a popular supplement and pharmaceutical companies are exploring more possibilities. North America constituted the most significant chunk of new product launches in the gummy supplement market.



|                |                  |             |                          |        |
|----------------|------------------|-------------|--------------------------|--------|
| Pre Challenger | Cultural context | Opportunity | Mainstream Vs Challenger | Impact |
|----------------|------------------|-------------|--------------------------|--------|

**FROM**

Boring, bland &  
confusing vitamin  
in pill form

**TO**

Fun & engaging  
gummy bear shaped  
vitamins, organic,  
effective & sweet  
tasting

## KEY THEMES

# HOW MAINSTREAM BRANDS BORROW FROM THE CHALLENGER MINDSET TO WIN

1. **LOOK FOR THE CRACKS & BE BIG AND BOLD TO BREAKTHROUGH:** looking to counter culture for inspiration and New Product development.
2. **FALL IN LOVE WITH THE PROBLEM:** Listening to the people who currently use your products and innovate for their needs & Pains.
3. **TREAT EVERY DETAIL AS A DIALOGUE WITH YOUR USER:** Any new proposition should be intrinsically linked to the holistic user experience of the product including Packaging, design, semiotics, technology.
4. **ALWAYS SAY YES AND:** Just because we can't do it today does not mean we shouldn't do it for tomorrow. Innovate for the future and stretch capabilities to meet new needs
5. **BASICS ROCK SO KEEP IT SIMPLE:** Everyone's life is filled with clutter and nonsense. Your job is to provide clarity where there is confusion for everyone. Be clear about what you're solving for and how you provide value to their lives.

## CASE STUDIES

# CHALLENGER BRANDS

WHITE CLAW

LIQUID  
DEATH

LUME

OATLY

CHOBANI

BILLIE

OLLY

HONEST

WELLY

MAGIC  
SPOON

LIQUID IV

