

The **NEXT BIG THING**



Allinson's bread re-design
Allied Bakeries | 2018 Entry
For Publication



Executive SUMMARY



BRIDGING THE GAP BETWEEN IN-STORE BAKERY AND STANDARD WRAPPED BREAD

Allinson's, a truly authentic 100 year old bread brand, with a pioneering spirit at its heart.

Driven largely by consumption trends around healthier eating, the pre-packaged UK bread market has been in decline for several years. However, bread is still central to home life with nearly every household in England purchasing it regularly, it just seems that shoppers are eschewing mass-produced sliced bread for something more wholesome and artisanal. (The Grocer, Bread & Baked Goods Category Report 2018). Although perfectly placed to tap into this new space, Allinson's were steadily losing ground to other major bread brands and in-store bakeries.

"I think people are looking at bread differently now – it's not just a carrier for other things, it's about the tastes, textures and look of the bread itself. In a jam sandwich the bread is just as important as the jam!" – Asda Master Baker Maddie Munden

Allinson's came to us with a desire to create the perfect solution, a bread that would bridge the gap between in-store bakery and wrapped bread, that would not only deliver on taste and texture but the look itself.

Just like the founder's rebellious nature we wanted to create a premium but disruptive brand

and packaging design, that elevates the brand's commitment to high standards and appeals to more discerning consumers who seeks a more premium experience from everyday bread.

Shifting people's perceptions of the bread brand, we were able to drive penetration and become the fastest growing brand in the category. Allowing consumers to really understand what it is that makes Allinson's so unique and relevant to their lives. The new brand heroes that maverick ambition which was at the forefront of why Thomas Allinson opened his own bakery 124 years ago.

- **FASTEST GROWING BREAD BRAND IN THE CATEGORY (PLANT BREAD)**
- **FROM -32% DECLINE, TO +73% GROWTH**
- **DISTRIBUTION INCREASE +11%**
- **REDUCTION OF 18 TONNES IN PLASTIC OUTPUT**

"WE ARE VERY EXCITED TO LAUNCH OUR NEW IDENTITY FOR ALLINSON'S. THE AGENCY HAS REALLY CAPTURED THE ESSENCE OF OUR FOUNDER IN THIS NEW IDENTITY DESIGN, WHILST ALSO HELPING TO ELEVATE THE BRAND TO A MORE DESERVEDLY HIGH-QUALITY FEEL WITHIN THE CATEGORY."

**MATTHEW CULLUM,
MARKETING DIRECTOR, ALLIED BAKERIES**



Case Study OVERVIEW

OBJECTIVES:

- REVERSE LONG-TERM SALES DECLINE
- DRIVE DISTINCTIVENESS IN ORDER TO CAPITALISE ON TRENDS WITHIN BAKERY
- DRIVE PENETRATION IN THE WHOLESOME BREAD CATEGORY
- DEFINE THE ROLE AND VALUE ALLINSON CAN BRING TO THE CATEGORY

BUSINESS CHALLENGE

Once a highly recognised wholemeal bread brand, Allinson's was experiencing a long-term steady decline, distribution losses, and being surpassed by major bread brands, such as Hovis who were strengthening their hold in wholemeal.

As the first to champion to the benefits of wholemeal bread, Allinson's should have been leading the category yet they were suffering from a lack of saliency. Lacking distinction, the previous design had limited standout on shelf meaning many consumers were not even aware it was still in existence and as a consequence had slipped out of their consideration set. **With little visibility on shelf, standout or distinctiveness communicating their point of view became a major part of the challenge.**

THE NEXT BEST THING TO BAKERY BOUGHT BREAD

The aim was to re-appraise the brand and deliver a positioning that would **bridge the gap between the in-store bakery and standard wrapped bread.** By clarifying the brand's proposition we would be able to shift people's perceptions ensuring the brand would **hold its own within the category.**



Through a new brand and packaging design we would be able to drive distinctiveness, ensure premiumisation that resonates and convince consumers that Allinson's is the next best thing to bakery bought bread.

STANDING UP FOR WHAT YOU BELIEVE IN

The Allinson's story began more than 100 years ago with Thomas Allinson who was something of a pioneer, passionately encouraging people to eat well and to enjoy the simple, healthy things in life. One of the first to advocate the benefits of wholemeal, his views were considered so unorthodox that he was struck from the medical register for his opinions.

So strong were his beliefs that in 1892 he bought his own mill and started producing wholemeal flour and bread to encourage people to incorporate wholemeal into their Victorian diets.

Born from a tradition of questioning the status quo Allinson's are just as passionate about baking as Thomas Allinson was all those years ago. Over the past century they've honed their recipes, using flour from their own mills and experimenting with new, carefully-selected ingredients to deliver delicious breads.

Allinson's is part of Allied Bakeries which is owned by Associated British Foods.





Case Study OVERVIEW



OVERVIEW OF MARKET

The UK bread market is composed of three principal sectors; large plant bakeries –like Allinson’s owner Allied Bakeries, in-store bakeries and craft/artisanal bakers. The UK bakery market is worth nearly £4billion and is one of the largest markets in the food industry.

However, due largely to consumption trends around healthier eating, convenience and variety the UK bread market is in general decline for the past four consecutive years (The Grocer 2017 Top Products Survey). In fact, bread has been labelled the number one most substituted category in the supermarket with private labels seeing significant increases in market share. (The Grocer, 17 April 2018)

However, it’s not all doom and gloom. These concerns around health and variety are seeing premium bakeries and untraditional formats flourish with sales of premium bread growing 4.5%. (Nielsen Scantrack Epos) Which placed Allinson’s in a very unique position to capitalise on the trends.

With the rise of trendy brunches and avocado on toast, people are looking to re-create these out of home dining experiences at home. Bread is shifting from a mid-week staple to an everyday luxury which people are willing to pay more for.

COMPETITORS

IN-STORE BAKERY

LIDL, M&S, MORRISON’S ETC.

JACKSON’S

HIGH STREET BAKERIES

GAIL’S

OUT OF HOME BAKERIES

BREAD CO-OP

FLOUR WATER SALT, E5 BAKEHOUSE

KEY FACTS

BRAND REDESIGN BUDGET; £50K

TWO PHASE LAUNCH; BRAND LAUNCHED

IN JAN 2017, NEW PREMIUM PAPER

FORMATS LAUNCHED JAN 2018.

SCOPE

ALL ELEMENTS OF PACK DESIGN

(COLOUR, LOGO, LAYOUT)

PRODUCT NAME & VARIANT NAME

SUBSTRATE & PACKAGING STRUCTURE

DESIGN FINISH

DEVELOP TONE OF VOICE & PERSONALITY



Case Study OVERVIEW

OUTLINE OF DESIGN SOLUTION

We were briefed to evoke the founder's passion for quality and refinement for Allinson's range of delicious, premium breads. The redesign aimed to elevate the brand's commitment to high standards by appealing to a more discerning consumer who seeks a premium alternative to everyday bread.

The project was completed in two phases, the interim phase was an essential first step in shifting people's perceptions of the bread brand. A redesign of the brand identity took the pioneering spirit of Thomas Allinson and put it at the heart of the brand. The new brand symbol acts not only as a guiding light in the world of bakery but also as the founder's signature sign-off of quality. It was also important to anchor the symbol with the year the brand was established, reinforcing Allinson's as a brand steeped in expertise and history.

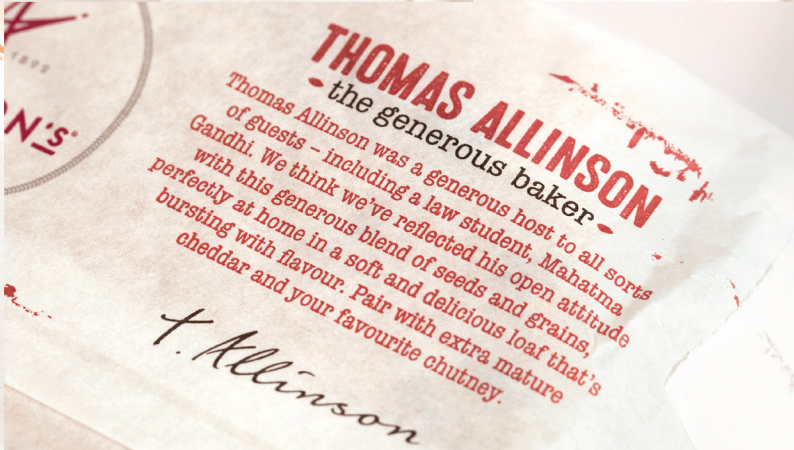
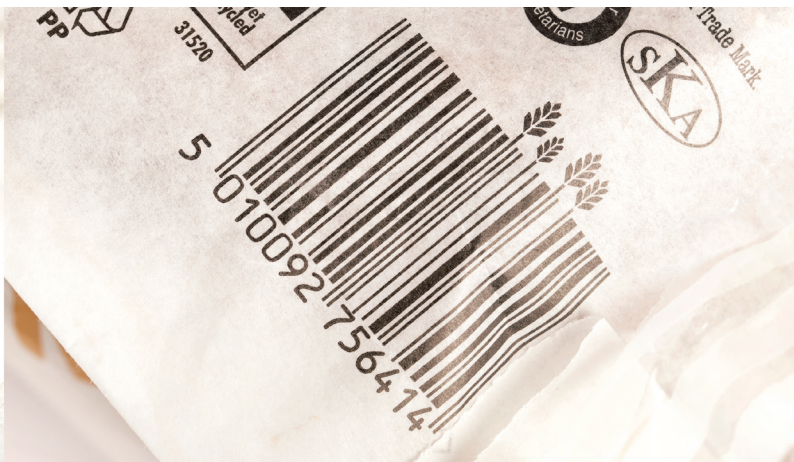
As soon as the first brand repositioning stage was underway we were already working on phase two, a radical new bread bag format, which due to complexities around production and testing would take time to test and implement.

We set about to bring the Allinson's pioneering positioning to life even further, utilising the brand identity to design entirely new packs that deliver a higher level of premiumisation that resonates with key consumers and stands out on shelf.

To further shift people's perceptions of the bread brand and convey Allinson's as the next best thing to bakery bought bread, together with the client we decided to take a risk and implement paper packaging- which no other major plant bread was doing at the time. The paper packaging with the clear window gives a strong 'fresh from the bakery' feel, while the ownable design elements are a move away from traditional pared back bakery design with a crafted and tactile feel. By taking risks just like their founder they have tapped into the artisanal bakery boom in a big way.

Product naming and TOV became about reinforcing Thomas Allinson's rebellious nature, with names that push boundaries - 'Scandalous Seeds' and 'The Champion Wholemeal'.

By truly closing the gap between in-store bakery and standard wrapped, Allinson's is leading the way in bread that delivers on all fronts.





Summary of RESULTS

By taking risks and evoking the founder's pioneering spirit and passion for quality Allinson's have been able to fundamentally reverse their fortunes. Since the redesign and after many years of gradual decline, Allinson's has turned this around to become **the fastest growing bread brand in the category – quite a feat!**

In emphasising the brand's commitment to high standards the design has elevated it's credentials in order to attract the growing consumer base for whom its proposition is so appealing.

OBJECTIVES:

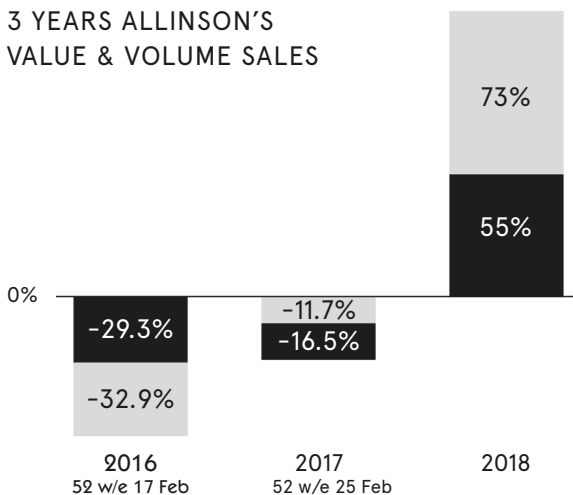
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REVERSE LONG-TERM SALES DECLINE

Allinson's had been struggling for a number of years, experiencing double digit decline in both volume and value. An increasing lack of saliency with consumers and with the trade meant that rival brands like Hovis were able to strengthen their hold in the category, especially wholemeal.

The new design elevates the craft credentials of the brand leading to a value sales uplift of 73% yoy and a volume uplift of 55% yoy, to become the fastest growing bread brand in the category.

3 YEARS ALLINSON'S VALUE & VOLUME SALES



DRIVE DISTINCTIVENESS IN ORDER TO CAPITALISE ON TRENDS WITHIN BAKERY

Brits are falling back in love with bread thanks to the rise of artisan and craft products. With the growth of premium bakeries and premium loaves, Allinson's is positioned perfectly to tap into this. It's all about offerings that are crafted, have heritage and time put in to them.

Understanding changing consumer preferences is crucial to driving sales. So our challenge became about convincing discerning consumers that Allinson's can measure up to artisanal products.

Allinson's range of breads has always been of the highest quality, using their own milled flour, home grown wheat and are batch-baked for extra softness. The new cob loafs are even cut by hand. The new pack design emphasises these qualities while offering the same shelf life as wrapped bread but with the taste cues of freshly baked.

With increasing awareness around plastics and packaging, the new paper bags not only reflect the in-store bakery feel which consumers are looking for but helps to reduce plastic production. The paper bag design has had a net reduction of **18 TONNES OF PLASTIC!**

DRIVE PENETRATION IN THE WHOLESOME BREAD CATEGORY

In order to drive growth Allinson needed to increase penetration amongst consumers looking for tasty and wholesome bread options and become entrenched in their consideration set to increase purchase frequency.

Since the redesign Allinson's **distribution is up 11%** and they have been able to considerably drive category value through growing their share of new shopper profiles. Adding +18% of share of older singles, +10% of those post family and +16% pre-family shoppers. (Nielsen Homescan Source of change and ScanTrack Brand Change, Total GB).

Which has led to a total of 62,000 new shoppers buying into Allinson's range of healthy and wholesome breads.



Summary of RESULTS

DEFINE THE ROLE AND VALUE ALLINSON CAN BRING TO THE CATEGORY

Sales of premium bread have grown +8.2% yoy (Nielsen Homescan 52 w/e 6th October). Contributing to this growth Allinson's has been helping to **drive category value in plant breads by an impressive 15.6% YA adding £1.1m in incremental value.**

And while Allinson's overall have been adding value to the category each of the core loves has been outperforming their respective subcategories.

+135.4% value growth versus wholemeal bread declining -5.4% (The Champion Wholemeal)
+97.4% value growth versus seeded bread growing at +9.9% (Scandalous Seeded Wholemeal)
+72.5% value growth versus White Bread declining -.7% (The Serious White)
(Data ScanTrack WE 08.09.18)

Where Allinson's has really been gaining is in the competitive wholemeal offering, up +8% from 18.85% to 26.90% value share (39wks pre and post paper move).

ADDITIONAL INFLUENCES

Following the launch of the paper bag format, Allinson's ran a relatively small print campaign, costing £170K.

The ads were all about telling the pioneering story of founder Thomas Allinson and heroed the new packs and brand identity prominently.

Allinson's ATL spend is the lowest of all the major plant bread brands. Warburtons- £5m; Kingsmill- £930,000; Hovis - £196.985



Sources of **DATA**

The Grocer, Bread & Baked Goods Category Report 2018.

The Grocer, City Snapshot, 17 April 2018.

Federation of Bakers, Industry Facts. UK Bread Market.

The Grocer, Allied Bakeries Strengthens craft appeal of Allinson's. 07 December 2017.

Nielsen Scantrack Epos, Total Cov/GB, Premium pre-pack Loaves unit yoy% MAT 52 w/e to 08.09.18

Nielsen Homescan Source of change and ScanTrack Brand Change, Total GB

Nielsen Homescan 52 w/e 6th October

Asda Blog, Master Baker Maddie Munden, Artisan Bread is on the Rise and these ones are Extra Special. 12 Sept 2017.