

**GLUTEN  
FREE**

**Genius<sup>®</sup>**

**CREATING BRITAIN'S *number one*  
GLUTEN-FREE BAKERY BRAND**

SUBMISSION TITLE **GENIUS**

INDUSTRY SECTOR **FOOD PRODUCERS**

CLIENT COMPANY **GENIUS**

DESIGN CONSULTANCY **PEARLFISHER**

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# Executive Summary

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In 2012, Genius – an established presence in the UK's fast-growing gluten-free sector - decided to re-brand.

Genius' brand identity was created pre-launch for what was then a niche product in a rapidly developing market. Five years on, it needed to respond to growing market pressure: from own label and branded gluten-free products, and new products from rivals adopting the green and purple colour cues Genius pioneered for gluten-free.

The rebranding, undertaken by Pearlfisher, had to better reflect Genius' achievements, creativity and ambitions enabling it to become the first gluten-free brand to break free from its niche to go mass-market.

It also needed to enable Genius to freely move cross-category – and continent – to achieve its ultimate aim of becoming a household name in mainstream bakery, without alienating its passionate, gluten-free consumer base.

Pearlfisher pinpointed Genius' heart as lying in its proven track record as an ingenious creator of products that make a difference to people's lives. The design solution amplified Genius' bright, warm and inspirational personality; great-tasting, genuine and well-loved products; and their consumers' journey: from restricted diet to liberated lifestyle.



## *Within one year...*

All data removed for confidentiality reasons

Genius became listed by every major UK supermarket - and is now sold in seven countries

Most of the thousands of additional distribution points Genius secured were within multiple retailers, including Tesco Express

Rebranding enabled Genius to connect free-from to the mass-market creating a powerful platform for growth.



# Project Overview

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## BRIEF

Pearlfisher was tasked to create the brand strategy, brand architecture, tone of voice, identity and packaging design to enable Genius to be *the first gluten-free brand to break free of its niche and appeal to the mass-market.*

The design solution needed to enable Genius to freely move cross-category and continent to achieve its ultimate aim of becoming a household name in the mainstream bakery sector.

The Pearlfisher team quickly identified an immediate challenge: As a brand rooted in a passionate desire to bring taste back into coeliacs' lives, Genius' core consumers are loyal and committed with an above average sense of ownership of its products.

So any design solution had to fulfil Genius' goals without alienating the brand's passionate gluten-free consumer base.

Coeliacs have an intimate and emotional relationship with the gluten-free brands they choose. They desire products that meet their medical needs without compromising food's taste or quality.

But this challenge also led Pearlfisher to a crucial insight that provided the key to the design solution: Genius' heart lay in its proven track record as an ingenious creator of products that make a difference to people's lives.

## BACKGROUND

In 2007, gluten-free pioneer Lucinda Bruce-Gardyne set out to find the perfect bread for her son who had been diagnosed as coeliac.

Two years later, she launched her first product - Genius White & Brown. And over the years that followed, Genius grew from strength to strength:

- Winning numerous awards for product quality, innovation and entrepreneurship
- Growing distribution through major retailers within the UK and overseas
- Expanding the product range, both within bakery to include products such as crumpets, muffins and biscuits and also into frozen foods

By 2012, Genius was a significant presence in the fast-growing gluten-free food market. Yet it also faced growing pressure from own label and branded gluten-free products - in particular, the entry of big bakeries, such as Hovis and Warburtons into the sector. Furthermore, an array of new products from rivals had plagiarised the green and purple colour cues Genius had pioneered for gluten-free.

*The company had to respond and chose to do so by investing in strategy and design.*

Although, Genius' brand identity was created pre-launch for what was then a niche product in a rapidly developing market, the business wanted the refreshed brand to better reflect the company's achievements and, most importantly, its future ambitions.



## THE MARKET

Free-from has been described as “one of grocery’s great success stories”, bucking the general decline in the bread market with growth of 25% in 2015 (The Grocer).

Its march on the British mainstream has been lent a huge helping hand by high profile endorsements from celebrities such as Victoria Beckham, Jessica Alba and Miley Cyrus (The Grocer). However, although the ‘fashion factor’ is said to have helped get free-from off the ground, it is now thought that increasing availability, quality and choice has contributed to its rise in popularity (David Jago, Director of Innovation & Insight, Mintel).

More specifically, gluten-free products represent a significant proportion of free-from sales. The gluten-free market was worth \$8.8bn in 2014 after sales surged 63% in the preceding two years (Mintel). In the UK, the gluten-free market was estimated to be worth £238m in 2014 – up 15% YOY on 2013 (Food Standards Agency) and an estimated 55.2% of Britons now buy free-from products with 1 in 5 of UK shoppers buying gluten-free products. (Kantar Worldpanel)

Looking ahead, Genius expects the number of people buying gluten-free to at least double as consumers choose gluten-free as a lifestyle choice - because it makes them feel better and less tired, for example.

*Gluten-free is therefore a market that is growing rapidly.*

But recent rapid growth has been driven by non-coeliacs. Just 1 in 100 of the UK population are estimated to be coeliac, or gluten-intolerant (NHS).

Eager to capitalise on all of this, Genius needed to ensure its new brand expression would:

- Better reflect its market leadership in free-from
- Demonstrate its accessibility to a mass-market audience without alienating existing consumers
- Simplify understanding and navigation of its growing product range

*Genius hoped that redesigning its brand would better reflect its achievements, creativity and ambitions* and enable Genius to be the first gluten-free brand to break free from its niche and become mass-market.

By getting it right, the Genius’ management team hoped to grow turnover to at least £50m within 2 years.

Project launch  
June 2013





# *Outline Design Solution*

Pearlfisher's Strategy Studio pinpointed Genius' heart as lying in its proven track record as an ingenious creator of products that make a difference to people's lives.

The Pearlfisher Design Studio's solution capitalised on the brand's bright, warm and inspirational personality; its great-tasting, genuine and well-loved products; and its consumers' journey: from restricted diet to liberated lifestyle.

## **STRATEGIC THINKING**

Genius' rebranding was underpinned by in-depth market analysis and research through which emerged a critical, strategic insight:

Gluten-free brands had yet to evolve in line with consumers' expectations of taste and choice or encompass 21st century consumers' changing relationship with food.

Closer inspection of the gluten-free sector revealed it to be a prescriptive space with branding defined by category convention and received wisdom. Consumer expectations, meanwhile, were that because they were functional, products, they would be less tasty - and existing brand strategies did little to challenge this. As a whole, the category was perceived as mundane, confused, restrictive and bland.

**So Pearlfisher identified a clear opportunity for Genius to take the lead as a brand icon - both within gluten-free and outside, positioning itself in the mainstream as the trusted, credible, definitive expert in food health, taste and innovation.**

# Design Solution

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Pearlfisher's redesign of the Genius brand identity took it to a new level.

The mark was upgraded so it could be used in a larger scale across Genius' growing portfolio of products. The typeface and bubble were refined to create a truly ownable equity, a bright new colour palette was introduced and on-pack messaging was rewritten with a fresh tone of voice. Meanwhile, all former medicinal cues were removed.

The aim of all this was to create both a feeling of greater unity across the product range and use colour to more clearly differentiate different groups of products. While the colour for different product groups reflected bakery convention - e.g. purple for seeded bread, blue for white bread - their intensity was adjusted to convey the brand's boldness and confidence.

Furthermore, the redesign made Genius' packaging *more environmentally friendly*

with bags that are now able to be recycled at supermarkets using local recycling facilities.

Pearlfisher's solution was a root and branch design evolution and the end result has successfully taken Genius beyond the existing aesthetic of the gluten-free category. *It has provided Genius with a powerful platform on which to build its mass-market credentials as a high impact, definitive, universal brand.*

Genius has become a champion of gluten-free that everyone can relate to, which is closely integrated into the contemporary world of food and taste.

Meanwhile, every aspect of Pearlfisher's work – from the strategic thinking and refreshed tone of voice to the warmth and boldness of the design solution – has informed every piece of brand marketing communication Genius has undertaken since, enabling the brand to go from strength to strength and become the number one in gluten-free.





# Summary of Results

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Five years after launch, Genius had re-written consumer perceptions of free-from. 24 months after re-branding, it has opened up free-from to the mass-market while creating a powerful platform for future growth - in bakery and beyond.

The results speak for themselves:

## **BRAND LEADERSHIP: STRENGTHENED**

Genius' rebranding has helped the business retain and strengthen its brand leadership in free-from bakery, bread and pre-packaged bread over the 12 months that followed... and beyond.

And this despite growing competition from a greater number of rivals, including free-from products launched by Hovis and Warburtons.

Genius' bakery products have experienced *substantial and sustained growth* since the new launch - growth that significantly out-performed the rest of the market.

All data removed for confidentiality reasons.





## GROWTH PLATFORM: ESTABLISHED

Stronger sales resulting from Genius' re-branding provided a platform for the subsequent launch of *9 new Genius products* including Choc Chip Brioche and White and Brown Rolls.

## DISTRIBUTION: GREW RAPIDLY, AND STILL GROWING

In the year following the redesign, Genius secured distribution in *thousands of additional outlets*.

Genius has also built impressive sales overseas where the rebranding has been rolled out - *Spain, Italy, France, Australia and North America.*



Genius' rebranding also persuaded retailers to change established merchandising practices. Before, gluten-free was displayed in a dedicated sub-section of the bread aisle but since the rebrand, retailers such as Sainsbury's and Asda have begun to integrate Genius products alongside mass-market bakery products.

### CONSUMER LOYALTY: DEEPENED

Following the rebranding, consumer attitudes towards the brand strengthened and deepened. For example, *Facebook Likes increased 66%* from 19,200 to 57,420 and *Twitter followers grew by 89%* to 47,000.

The new design has also helped the company strengthen the top end of the business with recent additions to the management board, working alongside Sir Bill Gammell of energy giant Cairn and former Warburtons' commercial director Roz Cuschieri (now Genius' CEO), including:

**Marketing Director Steve Clarke**

formerly Marketing Director UK & Ireland at Lactalis Nestle

**NPD & Technical Director Yann Salaun**

who joined from Weetabix

**Manufacturing & Operations Director Kevin Smithson**

who joined from Maple Leaf Foods



# Other Influencing Factors

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All data removed for confidentiality reasons.

There were no price promotions during the rebranding's launch and sales incentives remained unchanged.

The rebranding, which was the major focus for marketing expenditure in 2013 - the year it was launched - was supported by a themed integrated communications campaign called My Perfect Toast.

Like every piece of communication since the redesign, the style, tone and theme of My Perfect Toast was *led and shaped by Pearlfisher's new identity design and the strategic thinking behind it.*

Activity around the launch certainly boosted awareness of the new look. However, with little change to either overall marketing or advertising expenditure in 2013 and 2014, the *brand redesign was the predominant driver* of Genius' increased sales, consumer loyalty and engagement and overall company growth.

## Research Resources

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Genius' and bakery market stats detailed in this submission – Source: IRI Worldwide 52 weeks for 2013, 2014 and 2015  
Kantar Worldpanel  
The Grocer, Focus on: Bread  
Mintel, November 2014

