Join the TRIBE®

Helping TRIBE to conquer the functional snacking category with an adventurous redesign

FOR PUBLICATION

Executive Summary

TRIBE is a leading UK 'Better-For-You' snack bar brand, stocked in major national retailers including Waitrose and Sainsbury's. With a mission to create functional products that taste as good as they are for you, TRIBE's range of bars, powders and cereals has helped to build a loyal community of health-conscious customers.

Despite a loyal following and some good progress made in the big retailers, the competitive landscape had changed dramatically since TRIBE launched. The functional snacking category had become crowded with new entrants and range extensions from large, well-funded brands.

Although TRIBE had a strong product and solid retail listings, its packaging was recessive on shelf and didn't communicate the powerful taste and nutrition-led credentials that sat at the heart of the brand. It risked being lost in a sea of loud and well-funded competitors, or stuck forever in the sports nutrition aisle.

This paper tells the story of how bold, strategic design elevated TRIBE. By creating more with less, we helped the brand invest in distinctive and memorable visual assets that resonated with shoppers, helping them to stand out and unlock new growth.

The results speak for themselves: stronger perceptions across key brand measures, increased distribution in retailers and the fastest growth in the category that the brand had seen in recent years.

RESULTS AT A GLANCE

- **Brand Growth:** Fastest growing brand in the category by values sales after redesign with little promotional activity. (Increase of 127%).
- **Increased Distribution:** Strong distribution growth of 63%, reflecting retailers' confidence and consumer demand.
- **Brand Perception:** Strong brand perception scores across our 'natural' KPI alongside strong qualitative consumer feedback and sentiment.

BEFORE

AFTER

Context and Overview

KEY FACTS:

£27,500
DESIGN FEE

Q4 2024
PROJECT COMPLETION

Q4 2024
PUBLIC LAUNCH

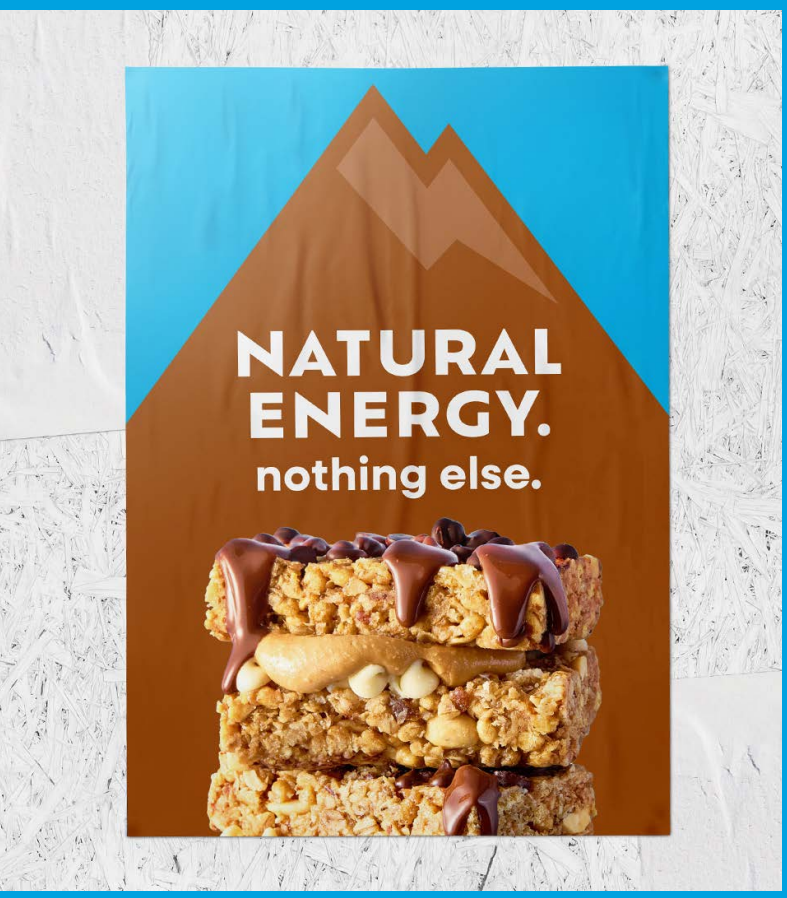
MARKET CONTEXT

Background: TRIBE and the functional bar landscape

TRIBE was launched in 2013 by co-founders Tom, Rob and Guy, with a mission to raise funds to fight modern slavery around the world. Since launching with a range of protein flapjack bars, the brand has innovated into 'protein and focus' bars, protein powders and even protein cereal.

Since the launch in 2013, the functional snacking sector has become increasingly competitive. A steady flow of indulgence-led new brands like Misfits and Barebells have entered the market, alongside range extensions from well established brands in the Mondelēz and Nestle portfolio, all backed by significant investment.

This has led to rapid evolution and fierce competition across the category, and for good reason. Brands that fall into the 'functional bar' segment have shown the biggest unit change across all cereal bar segments in the category (33%)[1] fuelled by a consumer shift towards healthier, functional lifestyles, an increased demand for balanced nutrition and the prioritisation of protein as a key macronutrient.


NATURAL
ENERGY.
nothing else.


TRIBE


TRIBE
protein flapjack
BANOFFEE CHOC CHIP
NATURAL ENERGY
7g PROTEIN
5g FIBRE
GLUTEN FREE
3x BARS
TRIBE
protein flapjack
CHOC HAZELNUT
NATURAL ENERGY
7g PROTEIN
5g FIBRE
GLUTEN FREE
3x BARS
TRIBE
protein flapjack
CHOC CHIP
NATURAL ENERGY
7g PROTEIN
5g FIBRE
GLUTEN FREE
3x BARS

The Challenge:

BECOMING A SIGNPOST FOR ‘NATURAL ENERGY’

Originally created as a bar for athletes, TRIBE needed to expand its target audience to capture this broader consumer shift, fulfil their commercial target and to grow the brand. The new target was the ‘everyday adventurer’ - someone who needed a protein boost no matter if they were a busy commuter climbing the stairs at Covent Garden tube station or an ultra-marathoner tackling the Ultra-Trail du Mont-Blanc.

TRIBE also recognised that the broad spectrum of consumption moments for protein-filled bars meant the category had become fragmented. The market was filled with diverse offerings ranging from those based on organic and minimally processed whole-foods to protein-rich and ultra-indulgent propositions. Finding the balance of taste and function in the design was key to move the brand forward.

The fragmented nature of the category and the debatable ‘healthiness’ of the ingredients lists you’ll find prompted TRIBE to define its positioning around Natural Energy. Nutritionally TRIBE stands out with a clear and unique selling point — delivering an energy boost via only natural ingredients.

This is validated by an ‘Excellent’ score on the YUKA[2] app and the brand’s ability to claim lower calories and saturated fat vs. the competitor set. However, this strong ‘natural’ message wasn’t effectively conveyed on pack. Recognising this gap, we identified Natural Energy as our North Star — shaping both the creative brief and the pack redesign.

As part of the brief, TRIBE also asked us to create a new pack design for their latest innovation, a ‘Protein + Focus’ energy bar combining the benefits of protein with adaptogens like Lion’s Mane and a rich blend of B vitamins. As the first functional protein bar of its kind in the UK market, it required a fresh visual approach. We needed to introduce this NPD in a way that would be cohesive with the new design architecture and system we were creating for their core ‘Protein Energy’ range.

Our overall ambition was clear – drive the brand’s growth by becoming the signpost for tasty natural energy in the category. To do this we’d need to create a fresh, modern design that could drive ‘new news’ for retailers without losing TRIBE’s loyal following, and packed with enough character to cut through in this extremely competitive category.

NATURAL ENERGY

We had 3 Key Objectives for this Design:

OBJECTIVE 1

Accelerate TRIBE's growth in the functional snacking category in the UK market

KPI: An overall increase in TRIBE's values sales within TRIBE's competitor set

OBJECTIVE 2

Create new appetite amongst retailers to secure more listings across the UK

KPI: Increase in distribution figures across current and new retailers

OBJECTIVE 3

See improvement in our 'Natural' brand metric and a positive uplift in customer sentiment

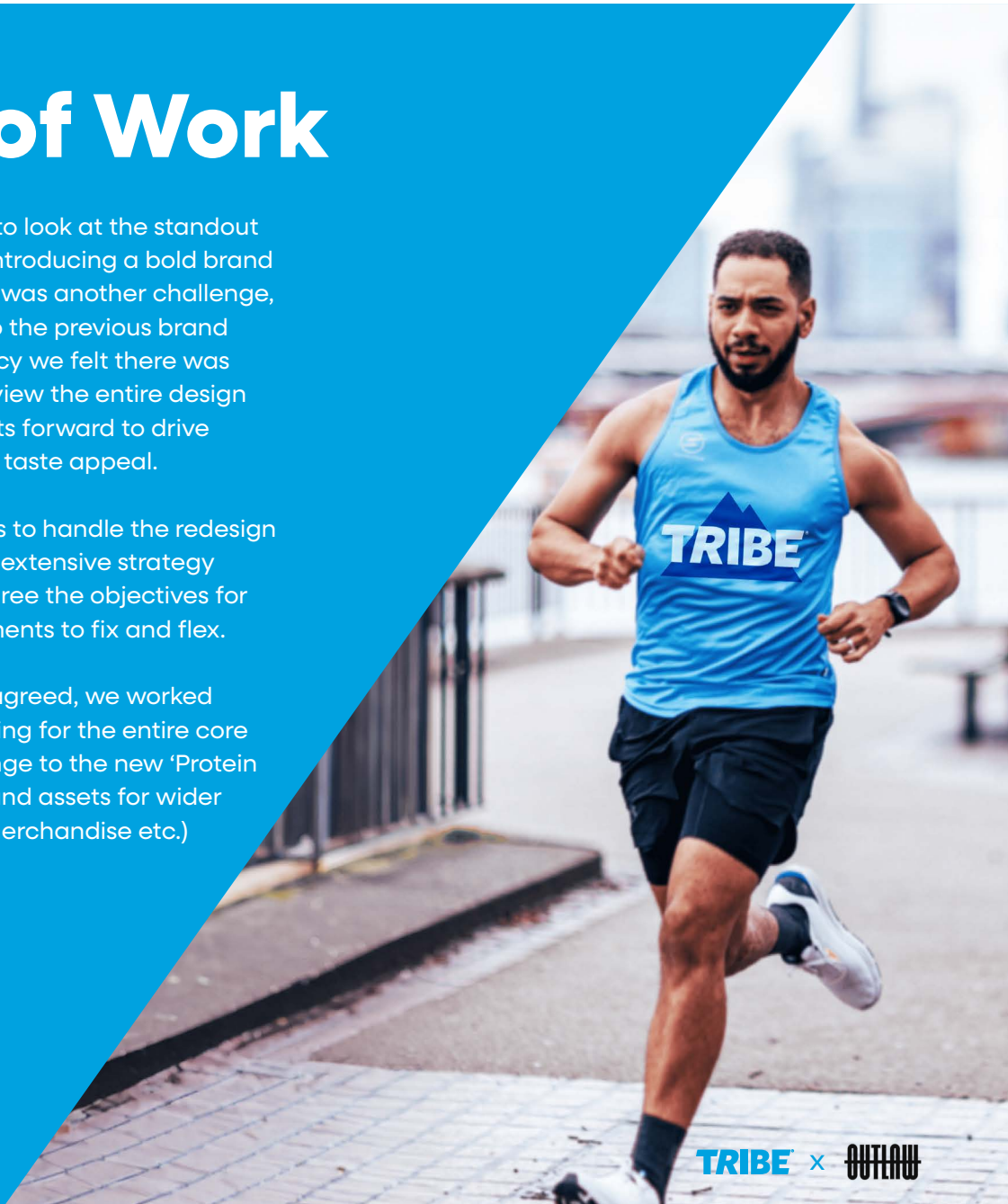
KPI: Improvement in our Natural KPI and a positive increase in qualitative customer sentiment around the key words 'taste', 'natural and 'healthy'

Scope of Work

TRIBE originally briefed us to look at the standout of the brand primarily by introducing a bold brand colour on pack. Modernity was another challenge, especially when it came to the previous brand logo. However, as an agency we felt there was a bigger opportunity to review the entire design system, moving all elements forward to drive stand out, recognition and taste appeal.

TRIBE worked solely with us to handle the redesign project. We carried out an extensive strategy phase and workshop to agree the objectives for design and the brand elements to fix and flex.

After the client brief was agreed, we worked on the redesign of packaging for the entire core range, extension of the range to the new 'Protein + Focus' bars, a suite of brand assets for wider brand updates (website, merchandise etc.) and brand guidelines.



Design Solution

STRATEGY

The project began with a comprehensive stage of strategy which included competitor audits, codes of the category and consumer insights and trend reviews. We shared our findings in an interactive working session with the client team, also testing a few hypotheses for what we should evolve from the existing brand vs. what we had to leave behind on our journey to realise their adventurous ambitions.

Our research revealed the need to more effectively communicate 'Natural Energy', clearly highlight protein content, and pair these primary messages with an energetic design and taste-driven visuals.

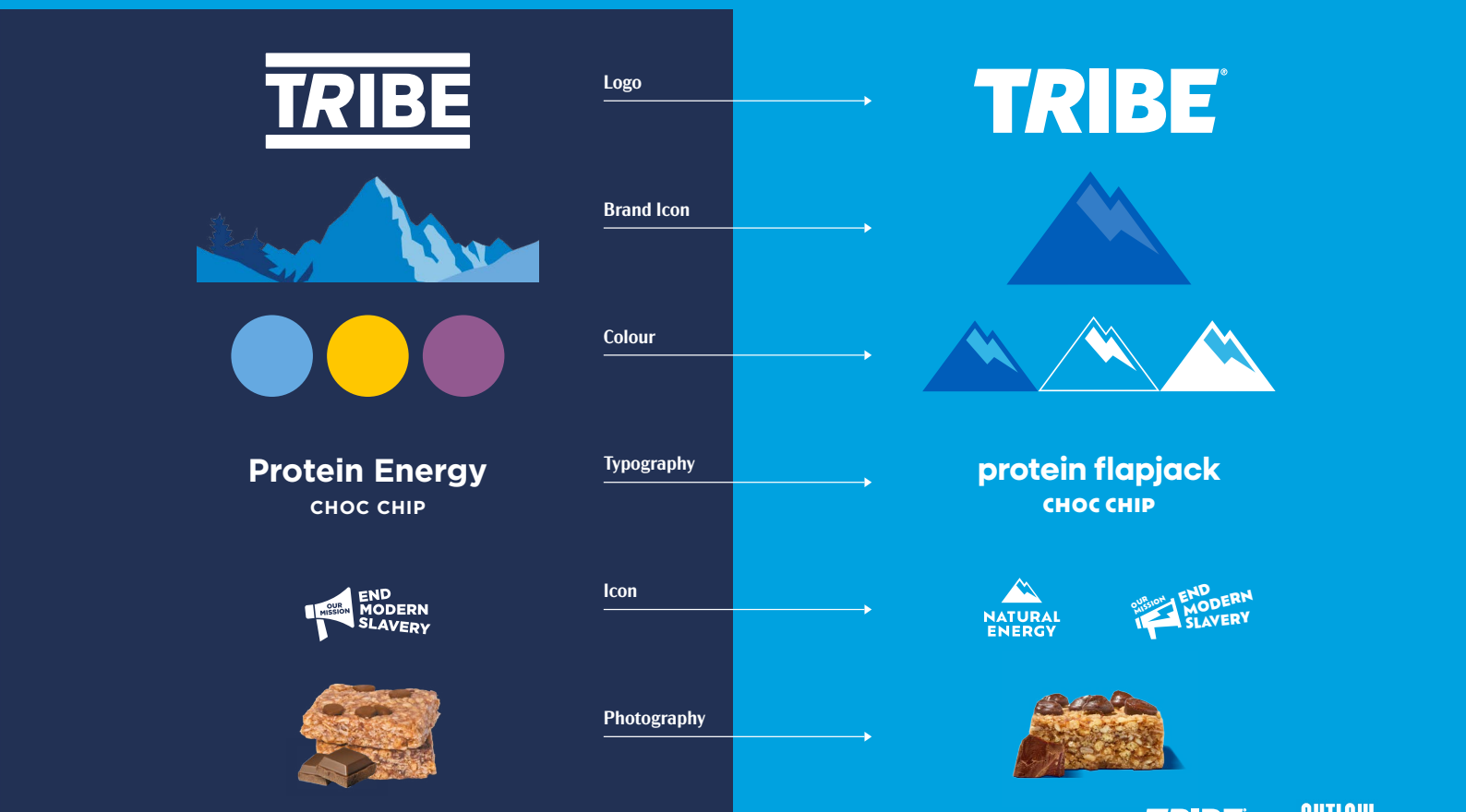
We knew that developing memorable assets, an ownable colour and a simplified architecture would help reduce the path to purchase for busy, on-the-go, impulse consumers.

In a category where consumers have under 13 seconds or less[3] to decide which snack they want, a cleaner, clearer design would reduce the mental load and make TRIBE easy for consumers to choose. We'd achieve this goal by developing memorable assets, an ownable colour and a simplified architecture, all inspired by what already existed in TRIBE's DNA.

DESIGN

We decided to carefully advance TRIBE's visual elements without forgetting the brand's past or becoming unrecognisable to the brand's core customer base. We wanted to move the brand on, without moving it off, across three key areas:

- **An ownable, distinctive Masterbrand colour:** When you think of the colour purple, you think of Cadbury's. When you think of the colour red, you think of Coca-Cola. Finding that ownable brand colour that doesn't cue flavour can always be a challenge, but we chose a delightful light blue which stood out against our competitors and created an ownable Masterbrand colour that acted as the blue beacon for TRIBE.
- **Memorable assets:** We know from mountains of research data that Distinctive Brand Assets keep brands top of mind in buying situations. Kantar Millward Brown[4], for instance, found brands with the strongest assets are on average 52% more 'salient' than their rivals. So we started by simplifying TRIBE's wordmark for greater personality, legibility and memorability. We also crafted an ownable mountain asset for TRIBE – something that's always been a part of TRIBE's DNA – enhancing its boldness and association with adventure and the outdoors.
- **Taste appeal:** Consumers love a bar with benefits, but taste is always #1, so we collaborated with renowned food photographer Nancy Anne to capture delicious product photography and maximise the taste appeal of the bars inside to hit our taste perception objective head on.



OUR MISSION END MODERN SLAVERY

Results & Other Influencing Factors

The overall redesign of the TRIBE brand has already achieved some fantastic results across our key objectives.

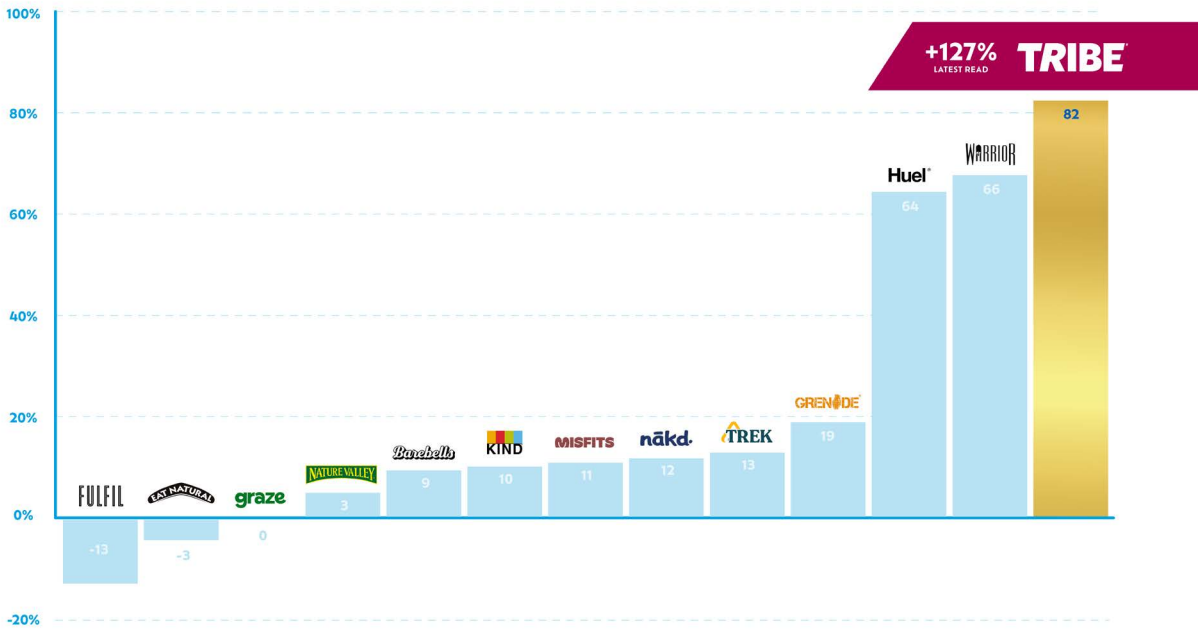
OBJECTIVE 1

Accelerate TRIBE'S Growth in the Functional Snacking Category in the UK Market

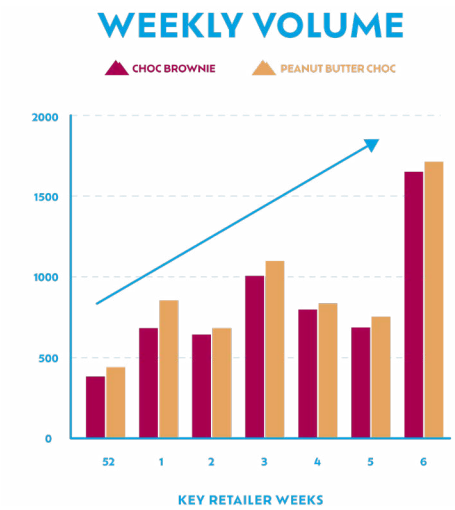
If design isn't helping to sell, then it's just decoration. Since our design went into production, TRIBE has become one of the fastest growing brands in the functional snacking category.

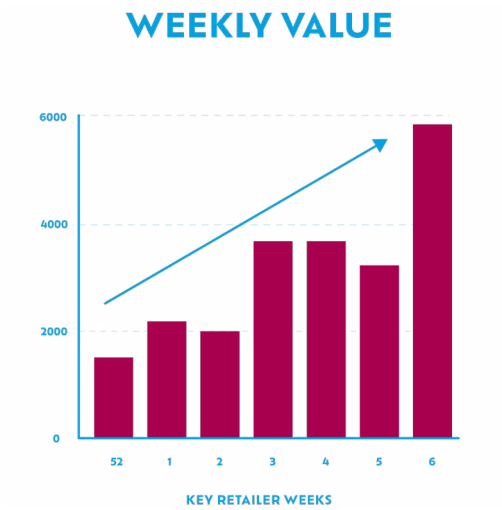
TRIBE has become one of the fastest growing brands[5] in the category with values sales growth of:

+127%



In one key retailer, TRIBE'S rate of sale[6] for the newly launched Protein + Focus bars grew incrementally week on week over a 6-week period after launch.



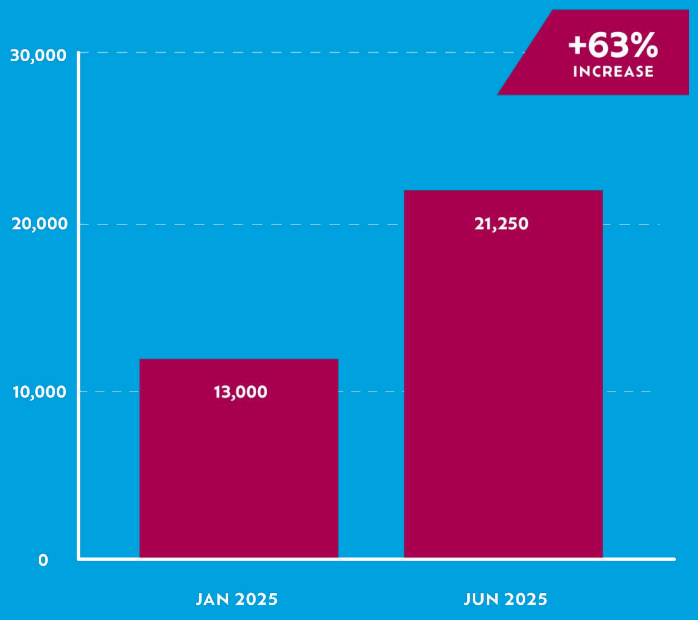


OBJECTIVE 2

Create new appetite amongst retailers to secure more listings across the UK

After our redesign, TRIBE increased distribution across a variety of key grocery partners compared to base levels in January 2025.

DISTRIBUTION POINT GROWTH



TRIBE achieved a strong increase in 'distribution points' from 13,000 in January 2025 to 21,250 in June 2025 – an increase of

63%[7]

reflecting retailers' confidence and consumer demand for the new look TRIBE.

('Distribution points' are an indicator for shelf presence and range displays.)

OBJECTIVE 3

See improvement in our 'Natural' brand metric and a positive uplift in customer sentiment

As a result of the redesign, we've also seen a great uptick across a range of brand perception metrics, both in quantitative surveying and qualitative feedback from customers:

- **Natural cues:** Consumers ranked TRIBE Protein + Focus the "most natural"[8] amongst competitors in an impartial survey vs. our direct competitors. This meant that we moved from 3rd position to 1st position on this metric.[9]

- **Taste and Natural consumer sentiment:** We also received consistently positive consumer sentiment on both taste and natural cues across a diverse range of product reviews:

"It feels more natural. The taste and texture were fabulous". [10]

"These fill you up well. Have a great amount of protein and fibre and a great taste without being too sweet or full of sweeteners". [11]

"These are the healthiest protein bars I can find, and they taste so yummy!" [12]

Results

FURTHER IMPACT AND ACHIEVEMENTS

TRIBE's impact goes beyond commercial achievements. The brand's success is empowering the business and its charity arm (TRIBE Freedom Foundation) to change the lives of those around the world.

TRIBE isn't just feeding bodies, it's fuelling communities, empowering real purpose and proving that healthier products can drive real-world impact - one bar at a time.

ACHIEVING THE HIGHEST ETHICAL STANDARDS

TRIBE doesn't just talk about ethics, it lives and breathes them. In May 2025, TRIBE secured B Corp certification with an impact score of 80.3[13], far surpassing the required benchmark and well above the 50.9 average for a typical business.

This hard but well-earned recognition confirms TRIBE meets the highest standards in governance, worker welfare, community engagement and environmental stewardship.

TRIBE FREEDOM FOUNDATION - FUELLING CHANGE

For every product sold, 1p is donated to the TRIBE Freedom Foundation, helping to raise over £2.1 million since 2013 to combat modern slavery.

Following the brand redesign, the Foundation has been awarded more than £90,000[14] in grants and engaged and mobilised over 5,000 donors and supporters. This strengthened support platform has significantly expanded its reach and impact - directly supporting 822 survivors of human trafficking with vital services such as safe housing, long-term rehabilitation, and reintegration support.

IMPACTING SOCIAL HEALTH

As a genuinely healthier alternative in a sea of ultra-processed snacks, TRIBE delivers 60% less sugar than leading competitors, fortified with nutrient-rich whole foods like oats, nuts, buckwheat, chia and pea protein - all products are 100% natural, vegan and gluten-free, with zero artificial sweeteners.

125 TRIBE sponsored runners crushed the 2025 Hackney Half Marathon, raising £30,000+[15] to fight modern slavery, whilst handing out 26,000+ bars to energise participants and elevate social health.

SUPPORTING BIODIVERSITY/ NATURE

TRIBE has challenged snacking category conventions by teaming up with regenerative farming pioneers, Wildfarmed, to launch the UK's first regenerative oat bar, a design that we helped to launch in May 2025.

Made with 100% regeneratively farmed oats, each product supports farming techniques that restore soil health, nurture wildlife, support and promote biodiversity and reduce pollution. The collaboration is enabling farmers to rebuild vibrant ecosystems for bugs, birds and bushes across the UK.

Other Contributing Factors

BROADER MARKET TRENDS AROUND PROTEIN INTAKE

Whilst protein products used to be the sole preserve of bulky blokes in dilapidated gyms, the idea of getting more protein into diets is something more of us are now thinking about, whether you are a die-hard gym goer or not.

In fact, almost 60%[16] of UK adults are prioritising – or will try to prioritise – consuming protein as part of their diet in 2025. While people's penchant for protein in recent years may have influenced results, the data shows that we have delivered greater increases in value vs. our competitor set.

SALES PROMOTION AND CO-OP MEAL DEAL

During the weeks following the launch of the redesign, TRIBE benefited from some promotional activity across key retail partners, including Waitrose and Sainsbury's. Whilst this will contribute towards product trial and penetration growth, many new entrants benefit from these price promotions within the functional snacking category.

Additionally, the brand secured expanded distribution through Co-op's meal deal program, the ultimate battleground for new impulse and on-the-go snacking brands.

MARKETING ACTIVITY

Although TRIBE had no above-the-line (ATL) marketing spend during the redesign period, the brand did engage in targeted sampling at the Hackney Half Marathon, where 26,000 bars were distributed. This grassroots activity likely contributed to building brand and product awareness, even in the absence of broader media support.

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CREDITS

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Steve Rich	Non-Exec Chairman

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