

*dragon*

# Free-from and the UK consumer

20 September 2006



# agenda

- Background
- What does Free-from mean?
- Heroes, substitutes and leave-its
- Some key differences in needs and outlook
- Challenges the sensitive consumer faces - and opportunities for best practice
- Brands and trust
- Information and experimentation
- Communication - the roles and limits of current devices
- Packaging design
- The future - hopes, predictions and last requests

**Background**

# Purpose of our research

- 'Free-from' produce and products have been available in the UK for over 30 years
- Recent signs that the world of 'Free-from' is expanding and qualitatively changing shape
  - Attracting new and different types of consumers
  - Entering ever more product sectors
  - Improving quality of product and packaging in many sectors where it is established
- Dragon has explored how the issues are understood and communicated amongst consumers to understand the issues, needs and brand-owner opportunities - from their point of view

***What can the brand owner -  
big and small - learn for  
tomorrow?***

# Research method and sample

- Two focus groups
- BC1C2 women
  - Group 1 - Female, single-sensitivity consumers
    - **Young women, pre-family, BC1, London based**
    - **Intolerant of specific foods, not 'allergic'**
    - **Had single food sensitivities (gluten intolerant, lactose intolerant)**
  - Group 2 - Male and female, pre-and-with family, mostly multiple-sensitivity consumers
    - **All but one with multiple food sensitivities**
    - **Majority with potentially life-threatening (anaphylactic) allergies**

# Research method and sample (cont'd)

- Five telephone interviews of 1 hour
  - 1 x 40 yr old male with ulcerative colitis
    - **Had the condition for 10 years**
    - **Cannot eat rice, potatoes, most dairy, bread, spicy foods**
  - 1 x early 40s mother of two children
    - **She has no intolerances**
    - **Daughter (11) allergic to peanuts, tree nuts, dairy, eggs**
    - **Son (9) allergic to all of the above plus white fish**
  - 1 x 57 yr old female, empty nester
    - **Dairy intolerance since c. 10 years ago**
  - 1 x 43 yr old mother of two children
    - **She is severely allergic to fish and nuts**
    - **Daughter (5) has lactose intolerance**
  - 1 x 28 yr old single woman
    - **Has been gluten intolerant for c. 6 years**

**What does Free-from  
mean?**

# What does it mean in terms of products?

- The term 'Free-from' means
  - “It’s *lacking* some ingredient you normally expect to find in it” (female, pre-family, 29, multiple allergies)
  - “I associate the phrase with supermarket food. It’s how they describe it, rather than how smaller health food shops talk about it” (female, 40, mum, multiple intolerances)
  - “It puts me in mind of special packaging, small quantities, quite expensive and not always very edible” (female, 37, mum of two sons, one with gluten allergy)
  - “It means that aisle in Tesco where they *segregate* it all!” (female, 40, mum, multiple intolerances)

***The phrase itself brings with it mostly negative baggage - is there scope for a more positive re-expression?***



# What does it mean in terms of consumers?

- The whole area can denote a degree of having ‘special needs’
- Intriguing double-speak exists here
  - Lots of initial use of loaded words
    - **“you feel like you are ‘special people’. Like you are a bit odd!” (female, pre-family, 27, gluten intolerant)**
    - **“I get funny looks from other shoppers when I’m browsing at the Free-from fixture” (female, pre-family, 29, multiple allergies)**
  - However, for most, having a dedicated cross-category fixture is appreciated far more than resented
    - **“Personally, I enjoy having it. I find it useful” (the *same* female, pre-family, 29, multiple allergies, as previous comment!)**
    - **“It’s handy. It sort-of compensates for all the extra time you have to spend scrutinising ingredient lists” (female, early 40s, mum of two children with multiple intolerances)**

# What does it mean in terms of consumers? (cont'd)

- Care needs to be taken not to make people feel too 'special' however
  - Yes, it's an important issue that affects a large part of their lives
    - **For some, literally a matter of life and death**
  - But many are determined not to feel *defined* by their own or their families' food sensitivities
    - **"I quite like hemp pasta, because it doesn't try to taste like Durum wheat pasta, it actually has its own possibilities. I much prefer to focus on what I can have" (male, 50s, multiple allergies)**
    - **"The emphasis for me is on being normal, not on being 'special'" (female, early 40s, mum of two children with multiple intolerances)**

***Particularly in more 'treaty' sectors,  
smart brand owners could look to  
accentuate the positive - can you  
create products that are 'in and of  
themselves' rather than safe  
imitations?***

# Heroes, substitutes and leave-its

# Current Free-from trends - first, some good news...

- Things are getting better, on several axes
  - Availability
    - **“Every supermarket you go into now pretty much has Free-from stuff available. A few years ago, I’d have to trek to a specific branch of Sainsbury’s. Now there’ll at least be the bread and pasta”** (female, 37, mum of two sons, one with gluten allergy)
  - Diversity of products
    - **“I’ve discovered, thanks to Tesco, I can have pitta bread now. That was nice, discovering that for the first time”** (male, 37, gluten intolerant)
  - Quality of products - in certain categories
    - **“Ice creams are hugely better now - I’d honestly rather have the Free-from than the normal, to be honest!”** (male, 50s, multiple allergies)



# Current Free-from trends - notable heroes

- Repeat mentions for product quality go to...
  - Swedish Glace
    - **“It tastes like really expensive nice ice cream - if we can get our hands on it. The other brands, we’re just putting up with by comparison!”** (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)
  - Terence Stamp Collection
    - **“That’s great. I could have some butter on it and it was actually enjoyable, not just put on there to disguise the taste”** (male, 37, gluten intolerant)
  - Kinnerton
    - **“Their dark chocolate tastes really good, in fact. A bit bitter for children, but great for me!”** (female, early 40s, mum of two children with multiple intolerances)



# Staples are more readily substituted than 'complex' products

- The key to 'can't do without' lies in cooking or where an ingredient is part of an important eating routine
  - “Cereal. As soon as I was diagnosed, it was the first thing I just had to find. I need a good breakfast” (female, pre-family, 27, gluten intolerant)
  - “Soya butter. Couldn't do without it. On toast. You've got to have *something* on toast!” (female, 37, mum of two sons, one with gluten allergy)
  - “Soya milk, for the morning bowl of cereal. I do feel strongly that Elizabeth's got to have a proper breakfast” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)



***Semi-captive audiences to fight for here - but don't hold them prisoner to poor quality-of-experience***

# Nice-to-haves and live-withouts

- More 'complex', confected or personal taste-specific products are more easily dispensed with
  - Some more reluctantly than others
    - **“Beer. Never been able to have beer. I did find one in Waitrose, but it wasn't very nice”** (male, 37, gluten intolerant)
    - **“I used to make my own biscuits anyway. They tasted really good and that way I knew exactly what had gone into them”** (female, pre-family, 27, gluten intolerant)
  - Very occasionally, some people with intolerances will opt for the pleasure and accept a little suffering - especially treats where there is emotional benefit
    - **“I can't do without my chocolate I'm afraid. I haven't personally tasted a particularly nice Free-from one, so I'll have a wee bit of Cadbury's and suffer!”** (female, empty nester, 57, dairy intolerant)



***How can you add true deliciousness to make your offer indispensable?***

# **Key differences in needs and outlook**



# Single sensitivity and multiple sensitivity consumers



- Life and coping strategies are relatively straightforward when you have a single food sensitivity
  - “Why do you have to make products that cut out everything - why can't you just make products that cut out each one? Is it so they can save money?”
  - “That aisle makes us feel like ‘special people!’” (female, pre-family, 27, gluten intolerant)
  - These also tend to be more self-conscious about asking friends and family to ‘accommodate’ their sensitivities
    - **“I was brought up with a ‘don’t be fussy’ attitude, so it’s hard now having an intolerance” (female, pre-family, 27, gluten intolerant)**
- Things are more complicated - and ironically also more no-nonsense - for those with several food sensitivities
  - “I’m also diabetic, so a lot of Free-from products are full of sugar so I can’t have them anyway” (male, 50s, multiple allergies)
  - “I read everything. Twice. I read it and then my partner does to make sure I haven’t missed anything” (female, pre-family, 29, multiple allergies)

# Allergy sufferers and those with intolerances

- Outlooks here are broadly similar
  - Both types of consumer remain keen not to pre-occupy themselves with their food issue - or be 'defined' by it by others
- A slight tendency to take calculated risks if they have a quality-of-life-impinging intolerance rather than a life-threatening allergy - or even a 'milder reaction' allergy
  - “I love red salmon. I know I'm not supposed to eat fish, but I don't have quite such a bad reaction to that, but I still get a bit of a one. But I can't resist!”  
(female, mum, 43, multiple allergies herself, with daughter lactose intolerant)

# Different lifestages have different needs

- Singletons have a greater degree of control over diet and shopping
  - All they require is the information to give them confidence, and then availability of good quality products
- People with intolerances generally have very ‘tolerant’ partners!
  - “My husband and I will eat the same non-dairy spread as Elizabeth, it’s just easier to have one pack in than two” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)
  - “My boyfriend loves my cooking and he’ll eat anything. I mean, anything!” (female, pre-family, 29, multiple allergies)
  - “He’s quite happy to have what I have” (female, empty nester, 57, dairy intolerant)
- But there may be a ‘line’ between expectations placed on live-in versus visitors
  - “When my daughter and son-in-law come round, I give them what they’d like to have. I’d feel a bit mean being all ‘when in Rome’ about it” (female, empty nester, 57, dairy intolerant)

***You may have a wider audience to make things delicious for than we might at first think...***

# Free-from and families

- The picture changes significantly when you have children to buy and cook for
- The principle of 'do better by them than I might do by myself' we see in other areas (organic food, lower fat or sugar product) is replicated here
  - But with more serious and immediate consequences at stake if you get it wrong
  - Tendency for adults to 'chance it a bit' on some things that they think might give them an issue
    - **“but I just can't take risks for them” (female, early 40s, mum of two children with multiple intolerances)**

# Free-from and families (cont'd)

- Having food-sensitive children magnifies at 'both ends' of a spectrum of consideration
  - The *functional and practical* - giving children a good, healthy diet is as important here as for any parent
    - **“As a parent you do think differently. I don't eat fish, but for a child, you do think, 'what about the goodness in that which they're missing out on? But finding a substitute for those things isn't easy”** (female, early 40s, mum of two children with multiple intolerances)
  - The *emotional* - every parent wants their child to be happy and to enjoy their food
    - **“I'd like him to be able to have rice pudding. And my eldest loves Chinese food, which causes a problem for my youngest, so I tried really hard to find a way to make that work”** (female, 37, mum of two sons, one with gluten allergy)

***If you are a 'treat' substitute brand, could you do more to put the love back in?***

# Free-from and families (cont'd)

- As each change of lifestage within a family unit arrives, it brings new challenges and anxieties
  - Going to school:
    - **“It’s harder for children, by definition. They go to school, they see what other kids have, they don’t want to be seen to be different” (male, 50s, multiple allergies)**
  - Becoming independent:
    - **“I still buy virtually all the food that Charlie (9) eats, but Laura (11) is beginning to spread her wings now, buying food for herself when she’s out and about. I think she’ll be fine, because she’s sensible. But it’s going to be hard for me to let go, and I think it’s a little a bit hard for her to take up that freedom. She is a bit nervous about it” (female, early 40s, mum of two children with multiple intolerances)**

***As a brand, can you do more to help smooth transitions and ‘hotspots’ of concern?***

# Rise of the lifestylers



- Anecdotally, an increasing number of consumers are experimenting with gluten-free or wheat-free products who may not necessarily have a diagnosable condition *per se*
  - A number of self-diagnosed consumers who may (e.g.) feel bloated after eating white bread and believe they have a form of intolerance to wheat or gluten
  - Some who just perceive potential benefits in cutting out certain ingredients from as part of a general ‘cleaning up’ of their everyday diets
    - **“I made a spelt loaf last year for a lady who insisted she couldn’t eat wheat. But she was eating an ice cream cornet as she ordered it!” (proprietor, St Martin’s Bakery, Isle of Scilly)**
- Consumers with actual or more ‘serious’ sensitivities can be a bit scornful - in the main, they see potential benefits
  - “I don’t like it when there are these people who are doing it for a fad. But if it means there will be more products available...”

# Challenges for the food-sensitive consumer



# Challenges

- The free-from consumer's world is one that requires constant vigilance - from them and ideally from you
  - Everyday commercial, marketing or production decisions have a disproportionately greater impact on these consumers
- Products changing
  - **“Jordan’s Frusli blueberry has now introduced almonds, quietly - they don’t flag it on the front ‘now contains nuts’ - just says something like ‘new and improved’”**
  - **“I came unstuck with Tesco choc chip cookies. They were dairy free when we bought them in-store. Later, we bought them online, but then they’d changed the recipe” (female, early 40s, mum of two children with multiple intolerances)**

***Communication lessons here,  
and not just for overtly Free-  
from brands***

# Challenges (cont'd)

- De-listing
  - “We’ve had problems getting a Free-from spread. We used to get Sainsbury’s own, and now my branch has got rid of it, and that’s tricky because she doesn’t like the Pure brand equivalent. It doesn’t taste so nice on toast” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)
  - “Our Tesco stopped stocking Pure’s Sunflower spread. There was a bit of an outcry over that, and they seem to be doing it again” (female, early 40s, mum of two children with multiple intolerances)

*Do you think before you axe?*

# Challenges (cont'd)

- Tales of the unexpected

- “Whey powder. They put it in everything. It’s even in Ecover detergents! It’s a cheap ingredient, and eight out of ten times, it’s used where the product wouldn’t normally have needed milk in it anyway. If it’s not an intrinsic component part, don’t include it and shut us out” (female, early 40s, mum of two children with multiple intolerances)
- “I’d buy McCain’s oven chips - things that are not specifically Free-from and I’ll get them home and discover they’ve got wheat powder coating them!” (male, 37, gluten intolerant)
- “You look at Hellmann’s Mayonnaise. The regular version has no dairy in it, but the light version - if you check down the ingredients list, that’s made with cream” (female, empty nester, 57, dairy intolerant)

***Think - are you doing anything that might appear counter intuitive - and do you need to stop or educate?***

# Brands and Trust

# Where does 'trust' come from in Free-from?

- Free-from product sector is dominated at two ends of a spectrum
  - Big retail players with own label offers (Tesco, Sainsbury's, now Morrison's)
    - **“For me, I'd be more concerned about economies of scale and whether they'd go bust or not. So I'd tend to trust the supermarkets more to be around for me”**
  - 'Small' brands with specific product or category focus (Kinnerton, Lyme Regis, Juvella, Alpro, etc.)
    - **“I'd feel happier with a little specialist brand, because it's the only thing their brand is about, so they'll know their stuff”**
- Distinct lack of 'big branded players' looking to take their equities in certain sectors and attempt a transfer to offering a Free-from equivalent
  - For many Müller own the yoghurt fixture with format choice and flavour diversity - couldn't they offer a similarly fun and great-tasting range of dairy-free yoghurts?
  - The answers provide some interesting pointers...

# Where does 'trust' come from in Free-from? (cont'd)

- **Single ingredient vs. complexity of product**
  - “They’re less likely to get it wrong, as you can’t mess it up so easily. So Homepride could conceivably do a good wheat-free flour”
- **Existing brand reputation for simple** and/or inferably ‘wholesome’ products
  - “McVities do more basic biscuits, like Digestives. So yes, they could do good wheat-free equivalents, in theory”
- **Existing product category reputation** for simple and/or inferably ‘wholesome’ experience
  - “Quaker, yes. Because porridge is a healthy food, it helps your digestion. And they are a trustworthy name”
- **Brand with heritage**
  - “They’re a good, old-fashioned brand. They’ve got history behind them. So, yes, I’d try a gluten-free loaf from them. Not Kingsmill. They’re a bit brash”

# Where does 'trust' come from in Free-from? (cont'd)

- **Brand or corporation with money** - or farther to fall!
  - “Well, you’d expect Kellogg’s to put the time and money into getting it right, because they’re big enough to have good research budgets. And their profile is so big they can’t afford to get it wrong!”
- **Brand with perceived reputation for ‘doing healthy things’** - brownie points for initiative and caring
  - Suggests that such a brand has taken a legitimate interest in such matters
  - “Flora.. They’re not the most natural products, but they have demonstrated willingness to think about people’s health, like heart health and so on”
- **Brand with a reputation for high quality** within its ‘regular’ category
  - “Ben and Jerry’s? Yes. That brand oozes quality. They give the impression that they really know what good ice cream is about. You know they’d only put the good stuff in”

# Where does 'trust' come from in Free-from? (cont'd)

- Limited portfolio can *either* help or hinder
  - “Hellmann's? Yes. They just focus on doing mayonnaise, and doing it well”
  - “The problem for me with Anchor is that they are so closely involved with butter, why would they *want* to do lactose-free butter?”
- Sometimes, having a broad, and delightful product portfolio can work against you
  - “Cadbury's? No. Their Bournville doesn't list milk, but it contains it. Even if they did launch a Free-from chocolate, I'd be concerned. There are so many other nice Cadbury bars that I'd feel that I was stuck with a poor option”





# **Information and experimentation**

# Where does people's information come from?

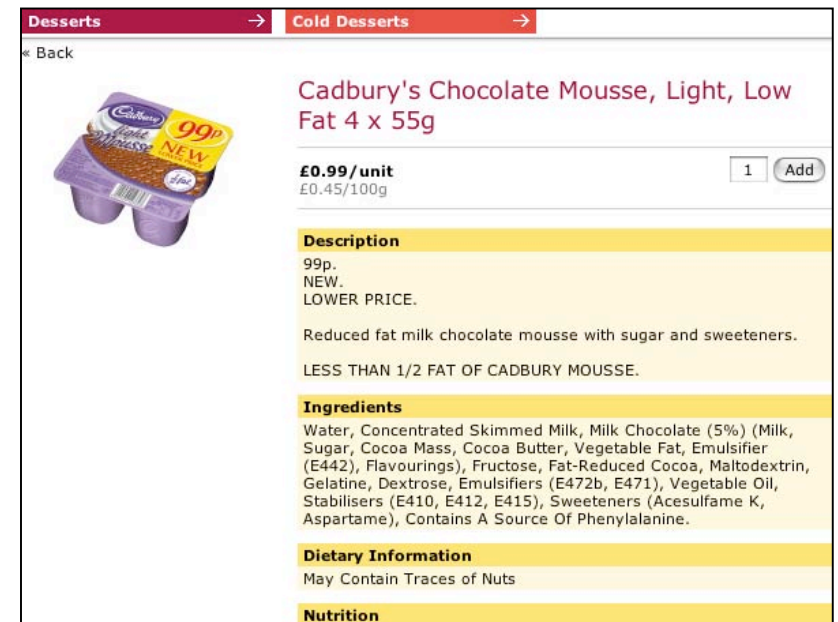
- Knowing about what you can eat, and where you can get it from - and what's new - is still largely from informal networks of the consumer's own making
  - Friends of friends etc.
  - “It's good actually - it's always exciting when you learn of something new you can have like that” (female, 40, mum, multiple intolerances)
- There is still an alarming element of ‘trial and risk of error’
  - “I'll read the labels, but ultimately the way I'll know is if I have a bad reaction” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)
  - “It's silly, I know, but I generally don't make too rational a decision. I don't really look at the ingredients too much so long as I can actually see the products through the packaging” (male, 37, gluten intolerant)

The screenshot shows the homepage of 'Steve Carper's Lactose Intolerance Clearinghouse'. The header features the name 'Steve Carper's' in red and 'Lactose Intolerance Clearinghouse' in white on a black background. Below the header, the main content area is white with the text 'Welcome to Planet Lactose' in blue. Underneath, there is a small icon and the text 'Come visit my Planet Lactose blog' in blue. A line of text says 'Be sure to check below for what's new.' Below this, there are two columns of buttons. The left column contains buttons for 'Lactose News', 'Q and A', 'Dairy Facts', 'Research', and 'My Books'. The right column contains buttons for 'LI Basics', 'Bookstore', 'Products', 'Fun Stuff', and 'More Info'. In the center, between the columns, there is text: 'For quick access, click on any button.', 'For descriptions, click on More Info.', 'Or Drop me a Line', 'Thanks for viewing.', and 'Steve Carper'.

*Can you help to foster easy, safe networking and word of mouth?*

# Where does people's information come from? (cont'd)

- An education drive to be done - many have beliefs about the 'perils' of online grocery shopping that lag behind today's reality
  - “Supermarket's websites are very difficult because often they don't list ingredients” (female, 40, mum, multiple intolerances)
    - **Not entirely true - Sainsbury's, Tesco and others do list ingredients of many products**
  - “Stuff changes, so you still have to be careful” (male, 50s, multiple allergies)
  - “Substitutions would be a problem for me” (female, 37, mum of two sons, one with gluten allergy)
- There is some readiness to accept 'better' online information and assistance from big name retailers
  - “Yes - if McDonald's can do it, supermarkets can do it” (female, pre-family, 29, multiple allergies)



***Re-educate consumers that the Internet is a useful and relevant tool in helping them shop confidently***

# Too much information?

- Limited awareness of FSA, NHS or other players and resources
  - Parents of children with multiple and/or serious allergies tend to take the greatest responsibility for educating themselves
  - But will tend to turn to specialist bodies or publications first
    - **Food Matters magazine, Inside Story newsletter**
    - **Anaphylactics Campaign (sic)**
- Not everyone wants to feel swamped
  - “I wanted something straightforward and didn’t find the Internet helpful. I just want a list of ‘do not eat this!’” (female, pre-family, 27, gluten intolerant)
- Fear of learning too much?
  - “You can put the wind up yourself a bit - like learning about soya and the (possible) risks to male fertility - we’ve still got to have it, and otherwise, you’d never eat anything! I’m as clued up as I need to be” (female, early 40s, mum of two children with multiple intolerances)

***Still a need to balance direct, straight-talking information with economy and sensitivity of expression***

# **Communication - roles and limits of current devices**

# Icons have their roles - and their limits

- Essentially, three different ways in which front-of-pack information icons 'work' for consumers
  - Shorthand for some
    - **A 'cross-wheat' icon can be enough of a cue to trigger a confident purchase for some**
      - *Particularly a single-sensitivity consumer*
      - *"That will usually do for me" (male, 40, colitis sufferer)*
      - *"Mind you, Heinz can be really inconsistent with their application of the cross-wheat emblem across their range" (male, 37, gluten intolerant)*
  - An 'invitation' for some to read on
    - **"I look at those first. To work out if it's still worth turning over" (female, pre-family, 29, multiple allergies)**
    - **Acts as a useful first-step to getting your product picked up and considered**
    - **But doesn't do it all - almost every multiple-sensitivity consumer reads the full ingredient list**
      - *So don't neglect back of pack*

# Icons have their roles - and their limits

- Essentially, three different ways in which front-of-pack information icons ‘work’ for consumers
  - They are ignored by many
    - **Surprising amount of not noticing these at all**
    - **Several respondents who did buy Sainsbury’s Free From range had never really studied their burgundy-and-silver suite of icons before prompting**
    - **Most will again head straight for the ingredients list**
      - *Some exceptions: “I’m sure I should be doing it more than I do, but you could spend hours - it’d get so you never get round to paying for and eating it!” (male, 40, colitis sufferer)*

# A strong preference for words

- The majority of respondents preferred a more direct ‘ticks and words’ approach to conveying what products did not contain
  - Tesco coming in for particular praise for its simple system
- They take less deciphering at-fixture in what can be an already-extended shopping experience
  - “Different people have their own different versions of symbols like wheat-free, so it’s sometimes easier just to go with the words” (female, 40, mum, multiple intolerances)





# May contain disappointment?



- One particular piece of non-specific information causes disappointment
  - “When they say ‘May contain nuts’. It’s a cop-out. If it says ‘may contain nuts’, it says to me, we’ve used nuts on that line, and we can’t be bothered to clean it properly” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)
- In fact, most people are reasonably resigned to this - tacitly, they think that preventing someone having a serious or fatal anaphylactic reaction is better than not saying anything at all
  - And many are sympathetic that assuredly nut-free facilities are hard to achieve
- What most people are nervous about is less the specificity of nuts being present or not
  - But that the *principle* of ‘no guarantees here’ might spread and shut them out of many more products they might otherwise enjoy
  - “Some places have gone overboard on the nut thing... I just hope they don’t start being lazy and putting ‘may contain milk’ or ‘may contain eggs’ on everything.” (female, early 40s, mum of two children with multiple intolerances)

# Packaging design

# Improve the aesthetics

- These products exist for serious reasons and have to do a no-nonsense job
- However, many questioned why the brands could not add a little more excitement to the surface designs of packs
  - “We’re all very much drawn to packaging - silly, really, but to a degree it reflects the effort the manufacturer may have gone to in making the food inside” (male, 40, colitis sufferer)
  - “I quite like wacky. Sometimes I wish the rice milk had some more dynamic packaging. Alpro is also boring-looking - small label, on a white plasticky pot. The card sleeve is colourful, but once I’ve binned that, I’ve just got white pots in my fridge” (female, empty nester, 57, dairy intolerant)
- Particularly commended: the new pack designs for Kallo’s Free To Enjoy treats:
  - “It’s Häagen Dazs-y. It makes you feel better about yourself” (female, 40, mum, multiple intolerances)



## ... and mind your language

- Two kinds of issue consumers can have with on-pack language
  - one functional
  - one emotional
- Functional - take care not to be too vague or use what might be simplifying language for you but frustratingly indistinct for them
  - “Sometimes you’ll see ‘flavourings’ in the ingredients list. But flavourings could mean yeast for all I know - and I can’t have that. Be more precise!” (female, pre-family, 29, multiple allergies)
- Emotional - is there scope for adding more aspirational and ‘everyday little treat’ cues in on-pack and brand communications language?
  - “[reading Kallo Free To Enjoy clusters pot] ‘10 minutes into my road trip, time for a snack... Woo hoo!’ I like that!” (female, pre-family, 27, gluten intolerant)

***A careful balancing act should be faced up to - balancing the ‘serious information’ with a little more aspiration***

**The future - hopes,  
predictions and last  
requests**

# Imagine Free-from, five years from now...

- When asked, our respondents saw a complex picture for the future development of
  - The nature and pattern of people's allergies and intolerances
  - The nature and diversity of what the Free-from sector will offer them
- There are 'new' allergies coming to light all the time
  - “In the past two school years, we've had two separate cases of children with allergies to kiwi fruit” (female, empty nester, 57, dairy intolerant - and a primary school teacher!)
- And a definite perception that a greater proportion of children now have intolerances or allergies
  - “There are more and more people and allergies and intolerances, definitely. And more awareness, too. When I was growing up, I knew no-one else who had a food allergy” (female, mum, 43, multiple allergies herself, with daughter lactose intolerant)

# Imagine Free-from, five years from now... (cont'd)

- But many detected the seeds of a better future for people with food sensitivities - that numerous factors are ticking away and coming together to force change
  - New shopping channels and habits create expectations for doing things differently
    - **“Lots of my pupils’ parents shop for groceries online. When you’ve got small children, you’re very busy, so you have limited shopping time. So I think we should see better ingredient information on the web from bigger companies” (female, empty nester, 57, dairy intolerant - and a primary school teacher!)**
  - And some sense a demographic time-bomb is ticking away
    - **Remembering the ‘lonely’ childhood of our lady who knew no other children in her situation growing up in the 1960s..**
    - **Not so now: “There is such a rise in the number of children with food allergies, and in ten years, these people are going to be out there doing their own shopping. They will want - and expect - to be able to buy as exciting a range of foods as their parents were able to enjoy. So, yes, I think we are going to see changes” (female, early 40s, mum of two children with multiple intolerances)**

# Last requests

- Given a free wish list, our respondents would most like you to
  - Get specific
    - **Label more *non* 'Free-from' products as to what they do and don't contain**
    - **Give good, clear information on pack - don't hide behind vague words like 'flavouring'**
    - **Standardised icons would be great for those who use them - but will require real effort and will to realise**
  - Get convenient
    - **Develop more foods that are quick to buy, accessible and delicious (sandwiches at the regular lunchtime fixture)**
  - Get fresh
    - **Look at getting certain products like Free-from cream, custard etc. into a more 'logical' home - the chiller - where they can borrow quality cues from that environment**



## Last requests (cont'd)

- Given a free wish list, our respondents would most like you to
  - Get inventive and think laterally to achieve value-adding solutions
    - **Some would love to see gluten-free breads in the instore bakery**
    - **They understand contamination issues and will happily accept these wrapped and baked off-site so long as they are newly baked**
  - Get tasty
    - **“Just because we’re allergic to things, it doesn’t mean we don’t have a sense of taste” (female, 37, mum of two sons, one with gluten allergy)**

# Key learnings and opportunities

## **If you are creating a new product**

- If you are offering a staple food or ingredient, don't settle for a 'that'll do' product experience
- If it is to be a 'treat', consider making it a fun product 'in and of itself', not an 'almost like' version of something else
  - The next generation of consumers may not do 'resigned'
  - And not only people with diagnosed conditions find themselves eating these products
- If you are making an 'almost like', ask: can we do a Swedish Glace and capture the best aspects of the 'real' thing?
- If it is (or could be) for children, think about 'donor-ability'
  - Make it so nice that you help mum show love, not just care

# Key learnings and opportunities

## **If you are building a brand**

- Look to get certain products merchandised in more 'logical' fixtures
  - Custard and cream substitutes can borrow much halo and appetite appeal from being found where you would expect to find such products
- Balance appetite appeal and even humour with the right degree of 'serious' information
- Think beyond the product portfolio alone to provide non-intrusive support for different needs of different people
  - And the changing needs of the same people
- Keep an eye on changing consumer needs and expectations on the horizon

**“Just love us and feed  
us!”**

*dragon*

# Thank you

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