

# McCallum Layton

Defining a Clear Direction

## Shopping for Free From



September 2011

Julia Horlov

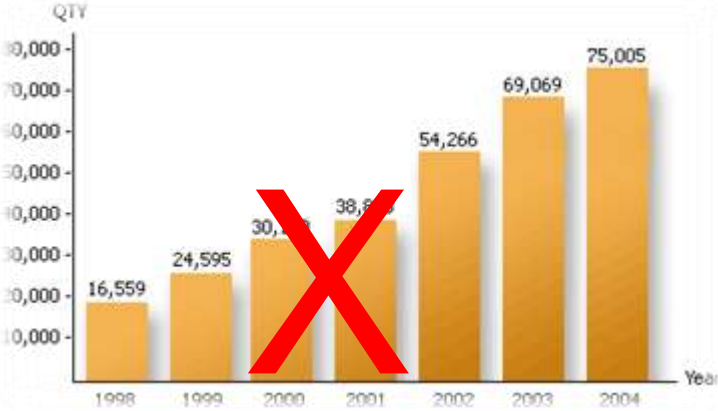
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# Consumer research



Quantitative



Qualitative



# Qualitative consumer research

In-store observation  
and intercepts



In-home depth  
interviews



On-street  
videography



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# Proliferation of interest in Free From



Everybody now seems to know somebody who eats Free From ...

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# Segmentation?

A significant challenge for the Free From industry ...



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# Segmentation by food types?



 **Aspartame**  
Aspartame is about 200 times sweeter than regular white table sugar. So only a little is needed for sweetening.



Free From is a hugely diverse range to group in this way ...

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# Segmentation by 'severity'?



Disease



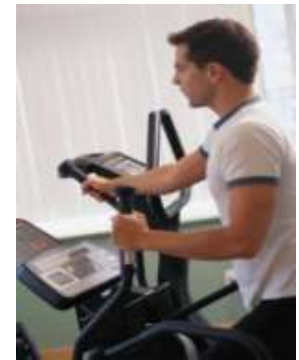
Allergy



Intolerance



Preference



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# Segmentation by 'severity'?



## Disease



## Allergy



Typified by ...

Medical diagnosis

Severe, sometimes, life-threatening effects

Eradication of triggers

Mind-set of illness, fear ...

... prisoners, restricted, think in absolutes

# Segmentation by 'severity'?



## Intolerance

Typified by ...

Self-diagnosis

Milder effects

Can use medication to overcome

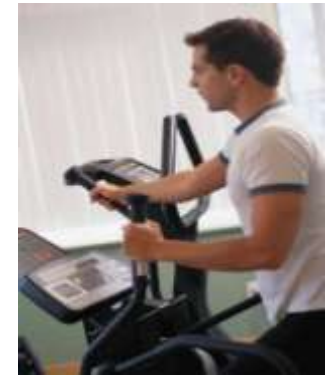
Avoidance of triggers

Mind-set of wellness, risk-taking ...

... preferers, think about making choices



## Preference



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# Learning to eat Free From

- A steep learning curve ...

- Use numerous resources initially

- Healthcare practitioners
- Websites
- Forums
- Media
- Word of mouth
- Supermarkets
- Trial and error

- Lots to take in

- E.g. Gluten in sauces
- New vocabularies
  - Fructose = sugar
- Ingredient familiarity

- Then become practised

- BUT somewhat pedestrian?
- Tend to stick to a tried and trusted repertoire
- Although always on the lookout for new items to add



**'Prisoners' are, understandably, more cautious and issue-focused e.g. NO gluten**

**'Preferers' are more likely to take a 'whole health' view e.g. fat, salt ...**



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# The challenges of eating Free From – at home



## Cooking from scratch

- Predominantly about safety
- Time-consuming, less convenient
- But leads to healthier eating overall



## Families

- Child 'sufferers'
  - Safety, happiness
- Catering for individuals



## Getting to grips with shopping for Free From

- Is it appealing?
- Can I eat it?
- Will I like it?
- How much is it?
- Where can I find it?

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# Is it appealing?

- Am I tempted to try it?
  - Is the packaging 'calling' me?
  - Is the emphasis on the food or the Free From?
  - Has 'worthy' come to be plain dreary?



- Is it just more of the same?
  - Hurrah for variety!!!!
  - Bread and more bread, chocolate or chocolate?



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# Can I eat it?

- How do I know if it's OK to eat?

- Do I trust the brand?
  - Supermarkets' own brand
  - High profile FF names
  - A serious tone?



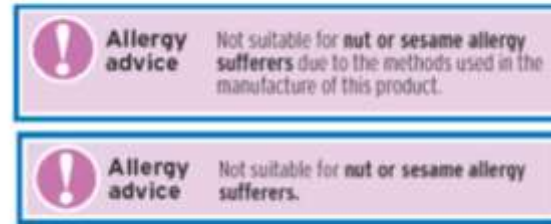
- What does the labelling tell me?

- Almost universally in too small a font!
- Shelf stickers are really useful
- Most require careful study
- Some symbols are ambiguous



- Calls for a clear, industry-wide system?
- And scanning apps for Smartphones?

E.g. the allergy advice box below indicates that the product is at risk of being contaminated with nuts or sesame.



Please note that both statements above mean exactly the same the only difference is the amount of space available on the label for the message.



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# Will I like it?

- How does it taste?
  - How much of the taste do I have to sacrifice?
    - Better nothing than a poor substitute
    - Standards are rising exponentially
    - BUT some are concerned about 'bad' ingredients (e.g. salt, sugar) used to compensate
  - Is the taste compromised by 'Free From' beyond my needs?
    - E.g. wheat avoidance is NOT the same as gluten avoidance





# What's the price?

- Is it good value?

- How expensive does it seem?

- In short, a fortune!
- The single biggest complaint
- Why does everything that's had something removed mean it's more costly?
- Few see justification for the huge price differential compared to 'normal' foods
- Exacerbated if the taste experience is poor

- How long will it keep?

- Keeping time and/or pack sizes can be critical to perceptions of value
- Most 'sufferers' are catering only for themselves
- Too expensive to feed the whole family on Free From





# Where can I find it?

- Where is it available?
  - Is there a convenient retailer who sells it?
    - Most head for larger supermarkets
      - or specialist health-food stores
    - Very little available from 'corner shop' sites
      - The usual bread and milk destinations!
  - Can I rely on it being in stock?
    - Empty shelves - the second biggest bugbear!



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# Where can I find it?

- BUT there's a danger of creating a 'Freaky Eaters' aisle?
  - Food types are diverse but display areas are rarely large enough to allow for good categorisation
  - 'Free From' takes over from food
  - Wholefoods always seem to neighbour ... ???
- In a perfect world ... ?
  - Display all and only 'safe' foods together
  - Impractical!
  - But in a virtual world ... ?
    - Users could register and eliminate their 'danger' foods from the online offer?



*"Porridge and custard? Yum!"*

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# The challenges of eating Free From – out and about



## Restaurants

- Menu clarity and detail
- Trust
- Co-operation

## Holidays

- Unfamiliarity
- Language



## Food on the go

- Little choice

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# Final thoughts

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Travelling



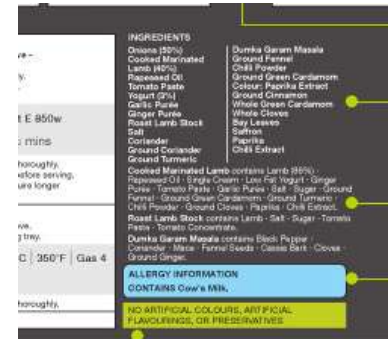
Top-up shopping



Taste




Temptation



Trust

And, finally, if trust is in the detail ...



- ▶ Download our making sense of food allergy and intolerance leaflet 
- ▶ Dairy-free, gluten-free, wheat-free and egg-free information and product lists

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**... defining a clear direction**



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