

leatherhead food research

The battle for
consumer truth

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Preparing for **disruption**



Preparing for **disruption**



Preparing for **disruption**



Preparing for disruption



'Brexit is a lesson in how quickly a country can degenerate into division and factionalism, and how tenuous are the bonds that hold us together around the vexed issue of national identity.'

– Jonathan Coe, Time Magazine,
How Brexit Broke Britain

Preparing for **disruption**



Preparing for **disruption**



'By 1979, we knew nearly everything we understand today about climate change – including how to stop it.'

– Nathaniel Rich, *The Decade We Could Have Stopped Climate Change*

Falling out of love with processed foods



Based on the average answers of 6,434 consumers from the UK, the USA, France, China and Brazil in August 2018

Consumer appetite for change



1 in 3
are trying to eat
less **meat**

1 in 10
are trying to cut
dairy from their
diet

1 in 6
are trying to eat
more **protein**

1 in 10
are trying to cut
gluten from
their diet

$\frac{1}{4}$
are trying to
drink less
alcohol

$\frac{1}{2}$
are trying to eat
less **sugar**

1 in 3
are trying to
cook more from
raw
ingredients



‘We are particularly looking for fresh foods as well as something where there’s been a consciousness towards the packaging.’

— UK consumer





'It's easy for smaller players to enter the market and give consumers what they are looking for. There are not the barriers there used to be ... and they can drive visibility in a similar way to the big CPG companies.'

— Technology
Development, Food Brand



Searching for consumer **truth**



Searching for consumer **truth**



Searching for consumer **truth**



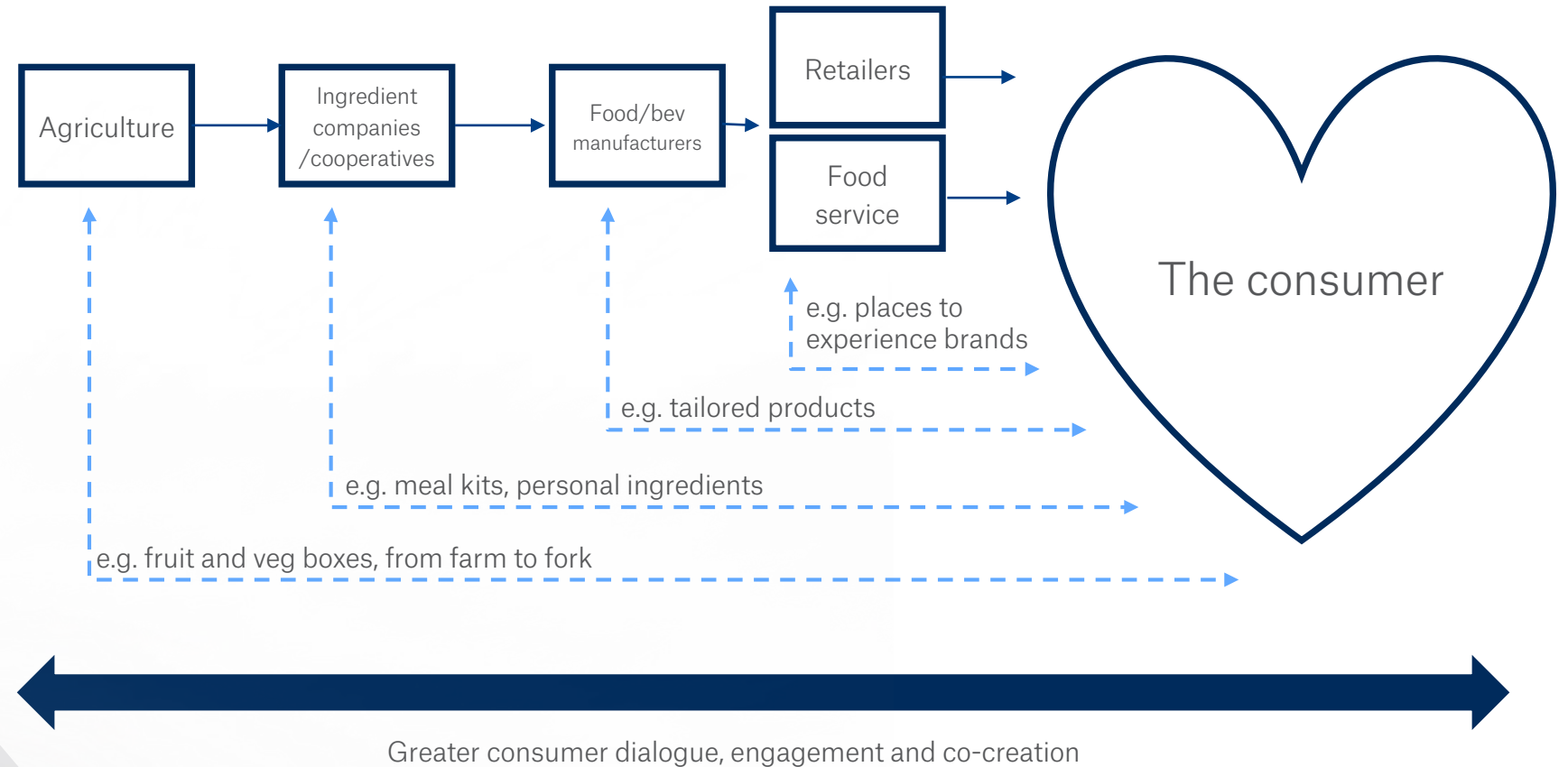
Searching for consumer truth



'There is a lot more work needed on the homework or insight... Innovation has to start from what motivates the consumer and from there, we should have a good hit rate on the right concept.'

– Director of R&D, Food & Beverage Brand

The battle is on to understand the consumer



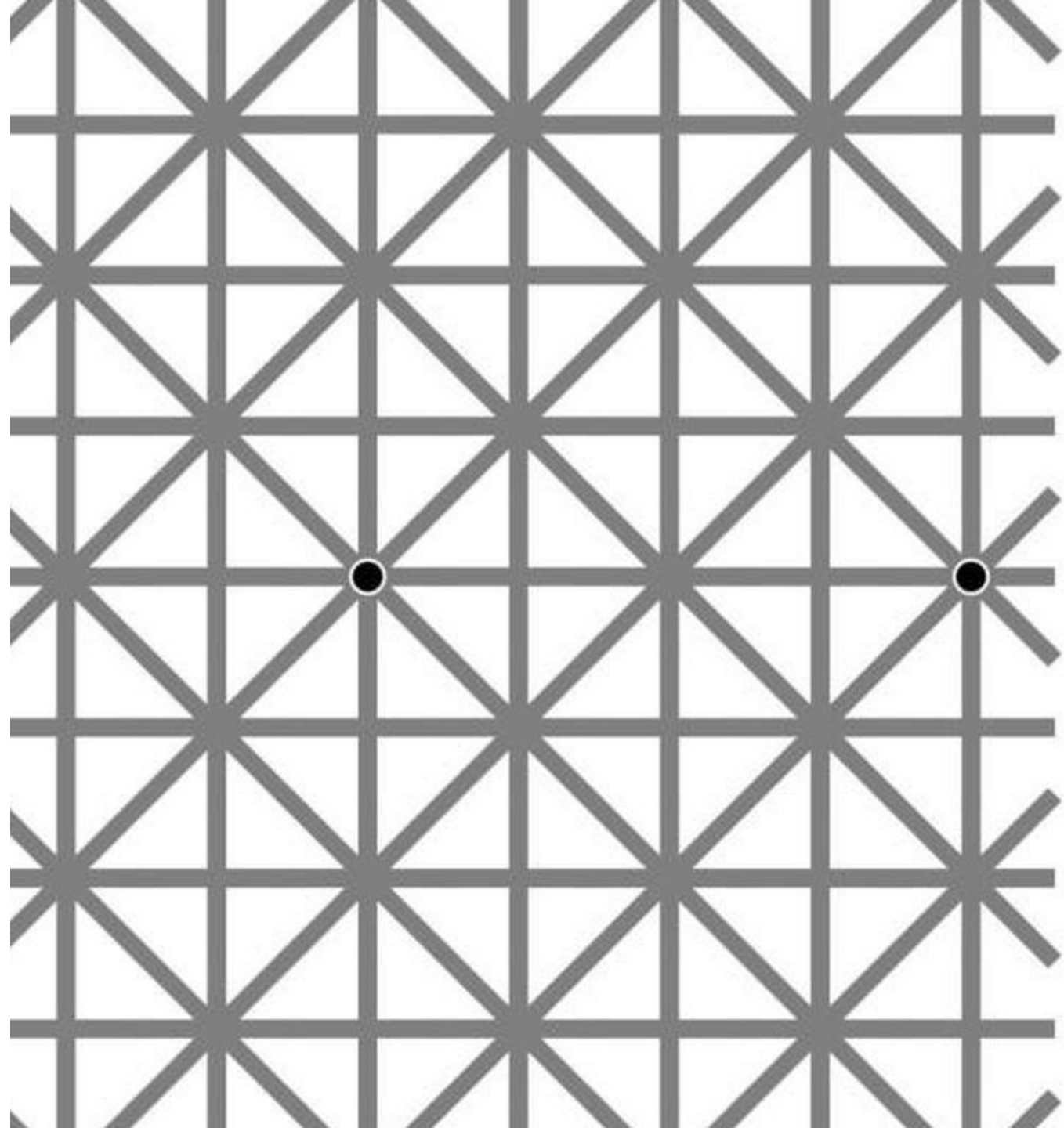


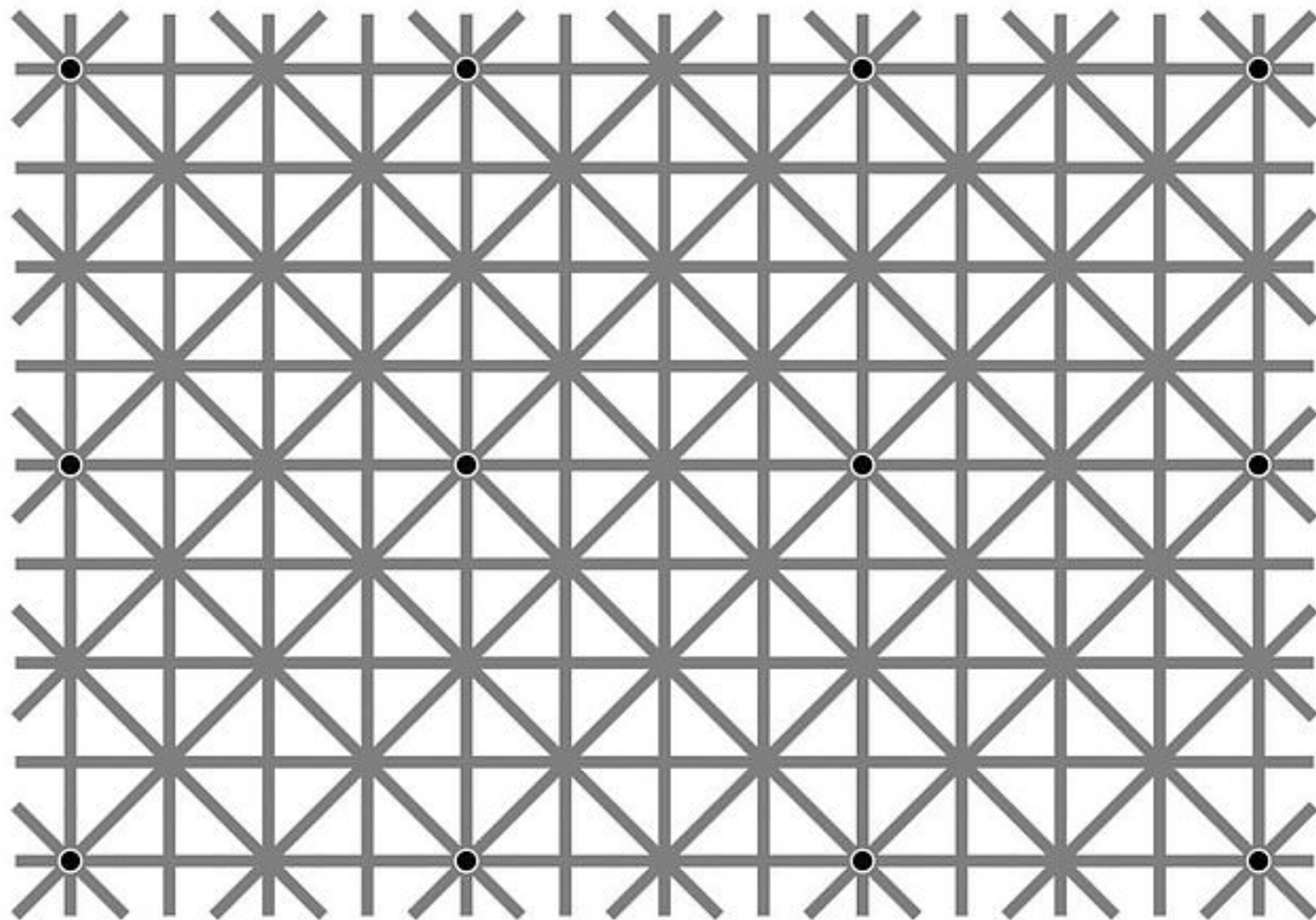
'Perception is more important than reality. If someone perceives something to be true, it is more important than if it is in fact true.'

– Ivanka Trump



How many dots can you see?





It's about
behaviour as well
as **perception**





The two cognitive systems influencing us



System 1

Fast
Intuitive
Automatic
Uncontrolled
Effortless

System 2

Slow
Thoughtful
Reflective
Controlled
Effortful



‘Small and apparently insignificant details can have a major impact on people’s behaviour. A good rule of thumb is to assume that everything matters.’

– Nudge by Richard H. Thaler & Cass R. Sunstein



How context influences us in practice: structures which impact behaviour



How context influences us in practice: focussing attention



How context influences us in practice: the status quo bias



Exploring the dynamics of human behaviour and the patterns in our behaviour can help us better understand how consumers will respond to new innovations and products



What can
technology
enable us to do?





Our window on the world in the palm of our hands



Changing sphere of influence



Friends



Professionals



OLD WORLD

Brand

INFLUENCES

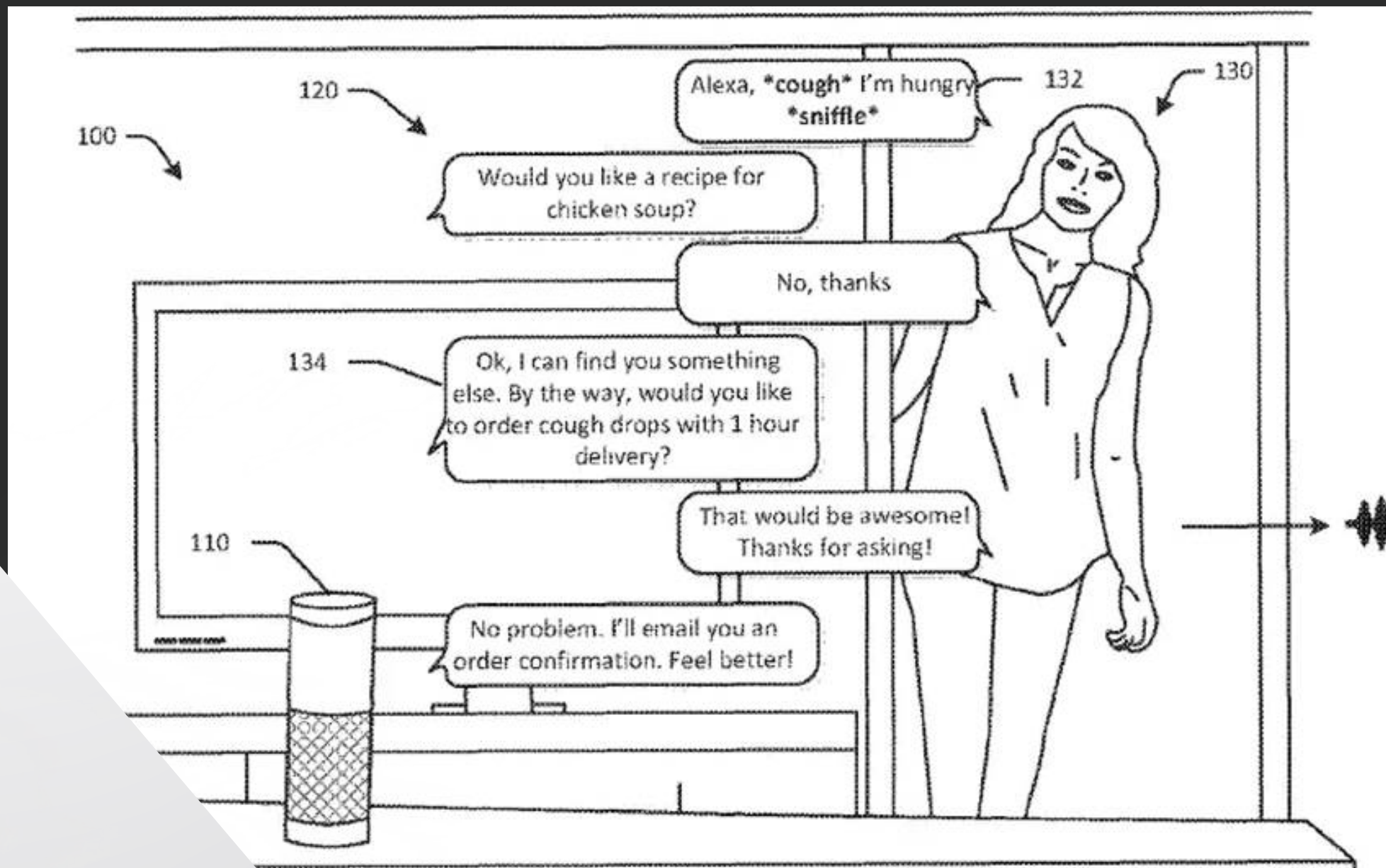
Changing sphere of influence

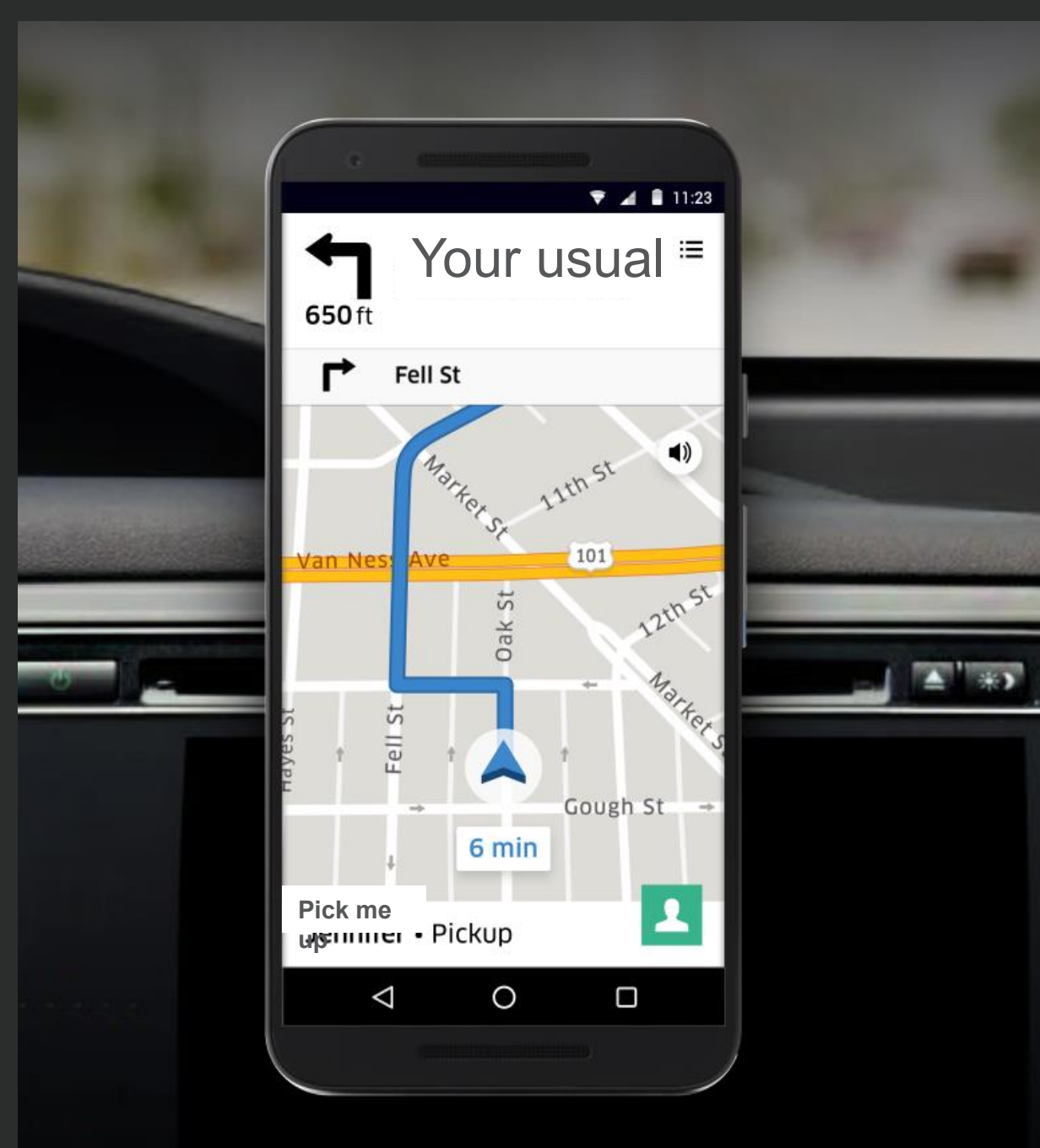






Measure, monitor, analyse, guide,
intervene, treat, dispense, apply,
personalise, encourage, connect,
deliver, comply, predict, immerse









Network

7:49 PM

100%

TOMATO

Solanum lycopersicum

AVG. 123 grams - 22 kcal

Nutrition Facts: Tomatoes, red, ripe, raw - 100 grams

Calories	18
Water	95 %
Protein	0.9 g
Carbs	3.9 g
Sugar	2.6 g
Fiber	1.2 g
Fat	0.2 g
Saturated	0.03 g
Monounsaturated	0.03 g
Polysaturated	0.08 g
Omega-3	0 g
Omega-6	0.08 g





1854

PRELEVA
IL DEST

Frutta e Verdura

B

Bontà

[bontà]
sostenibile e sostenibile

La presenza di Autorisultati
migliora il piano della
sostenibilità

Per noi di Coop la bontà
è il frutto della passione

Uova

BILANCIA

SACCHETTI

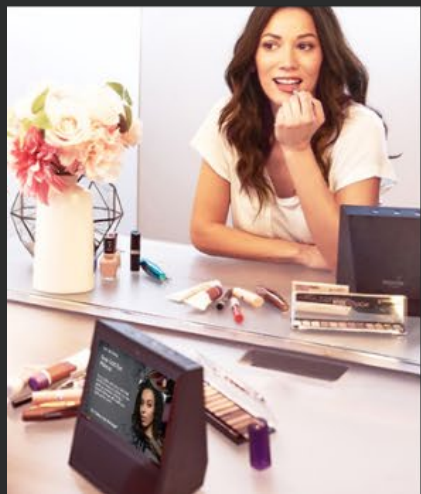
DIAMANTI



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Technology can
help us explore
the consumer
experience





Let's embrace
technology...

But it should not
be our masters

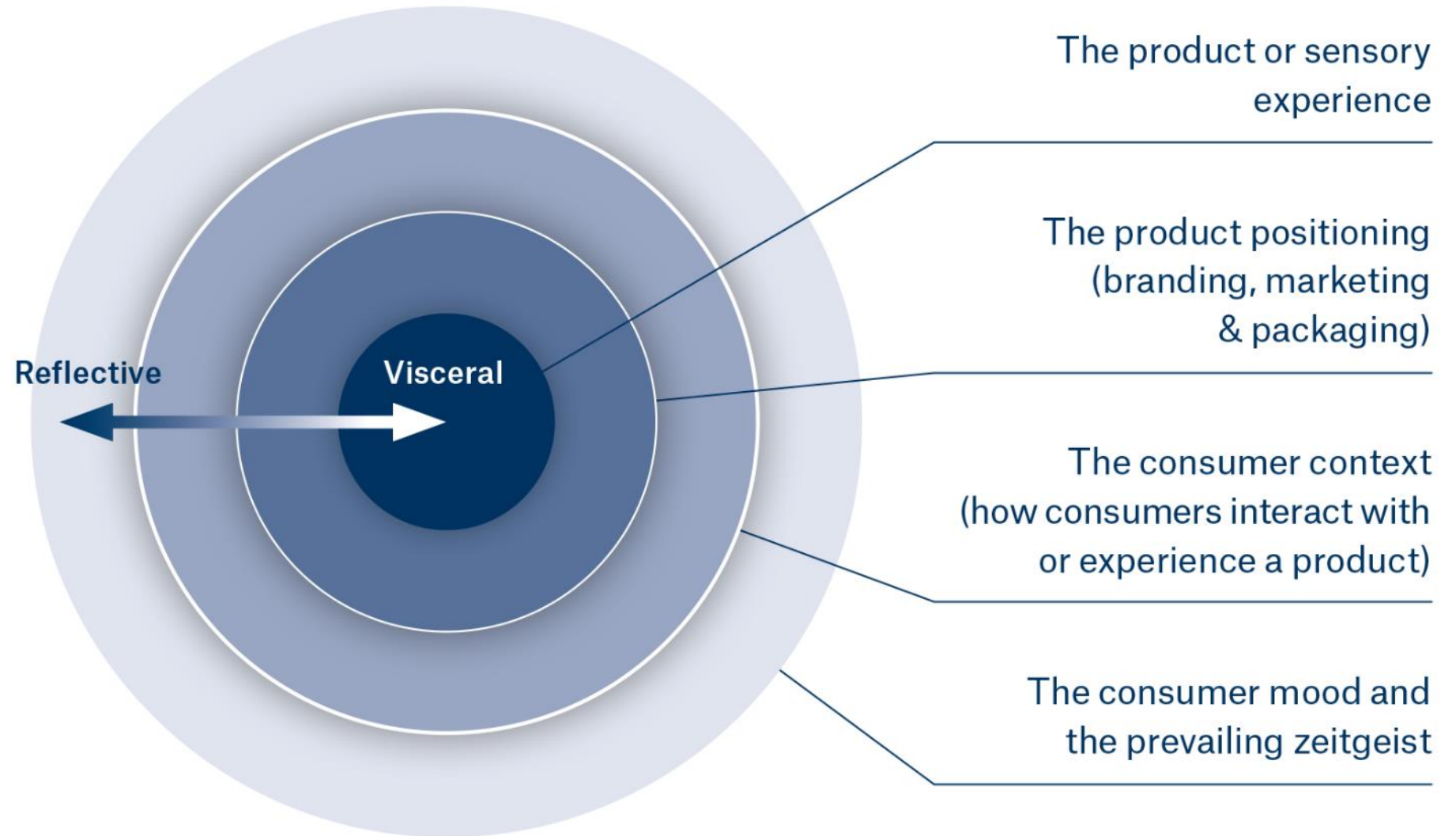


The future for consumer insight





Considering the product eco-system



From a design point of view, the 'visceral' elements are the physical characteristics and the usability of the product. The 'reflective' elements are the more meaningful and long-lasting emotions and connections which a product can engender.

Sensory
science

perception vs. reality

Consumer
attitudes

beliefs | needs | desires

Behavioural
science

psychology & economics

Using sensory science, consumer insight & behavioural economics to understand the dynamic consumer experience and predict how consumers will respond to new innovations and products





The fusion of offline
and online worlds





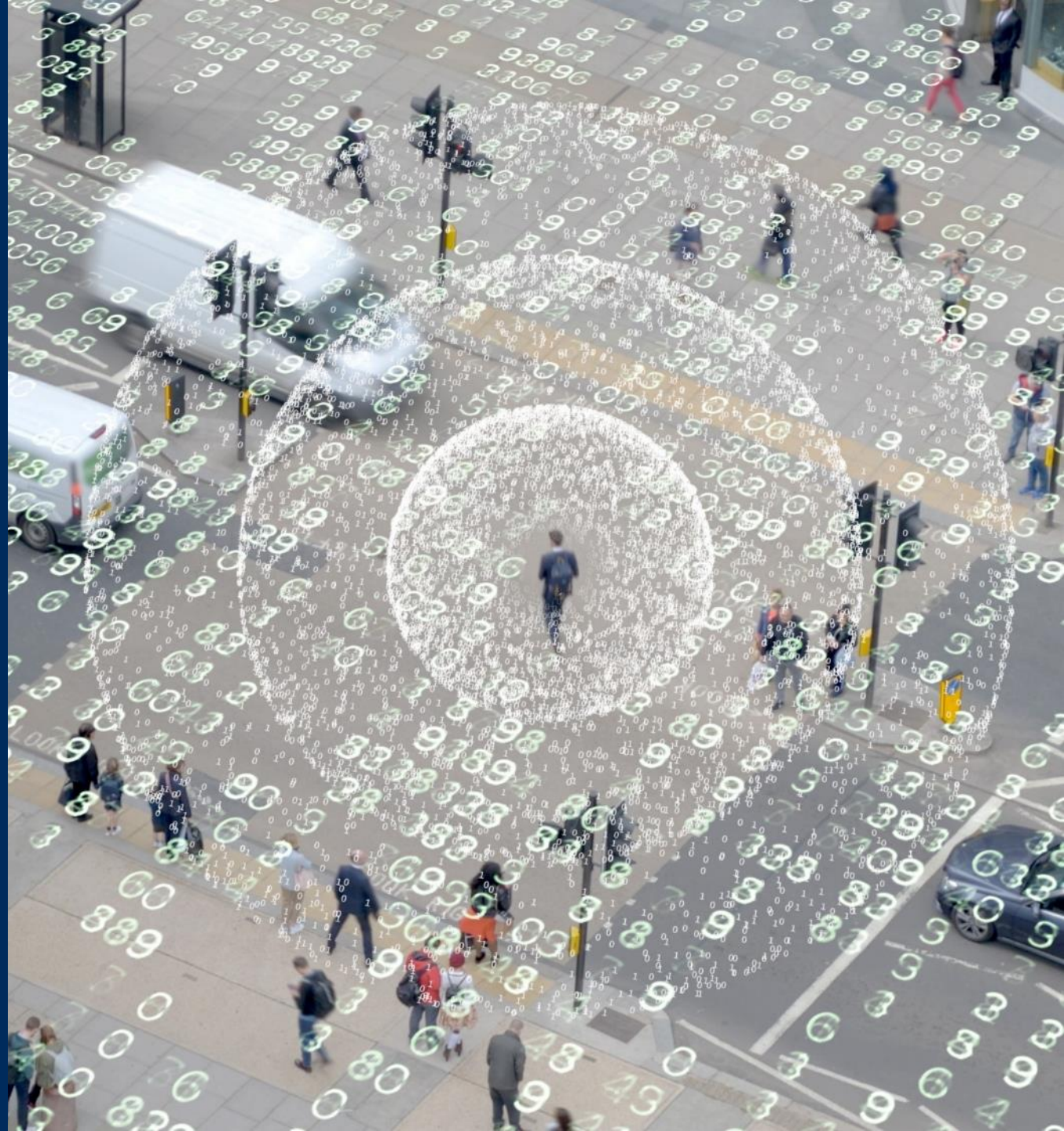
Understanding human
experience in real-time





Reflecting the nuance,
messiness, complexity
and beauty of human
experience

Using technology to
heighten our
understanding of human
experience but not
allowing it to be our
masters





Facing
disruption



Consumer
truth



Understanding
behaviour



Technology
enabling



The future

Questions

Thanks for listening!

Emma Gubisch- Head of Sensory and Consumer Insight

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innovate | access new markets | realise global opportunities