The battle for consumer truth

Emma Gubisch, Head of Sensory & Consumer Insight
Preparing for disruption
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‘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
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 10 are trying to cut dairy from their diet

1 in 6 are trying to eat more protein

1 in 3 are trying to eat less meat

1 in 10 are trying to cut gluten from their diet

1/4 are trying to drink less alcohol

1/2 are trying to eat less sugar

1 in 3 are trying to cook more from raw ingredients

Base: All (COUNTRY) Adults (6196)
‘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
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‘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

Agriculture → Ingredient companies/cooperatives → Food/bev manufacturers → Retailers → Food service → The consumer

- e.g. meal kits, personal ingredients
- e.g. fruit and veg boxes, from farm to fork
- e.g. tailored products
- e.g. places to experience brands

Greater consumer dialogue, engagement and co-creation
‘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

INFLUENCES

Brand
Changing sphere of influence

NEW WORLD

Friends

Professionals

Social media

Bloggers

Vloggers

Brand

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NEW WORLD

Friends

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Touchpoints with technology – functionality and benefits

Measure, monitor, analyse, guide, intervene, treat, dispense, apply, personalise, encourage, connect, deliver, comply, predict, immerse
Touchpoints with technology – functionality and benefits

Measure, monitor, analyse, guide, intervene, treat, dispense, apply, personalise, encourage, connect, deliver, comply, predict, immerse
Alexa, *cough* I'm hungry

Would you like a recipe for chicken soup?

No, thanks

Ok, I can find you something else. By the way, would you like to order cough drops with 1 hour delivery?

That would be awesome! Thanks for asking!

No problem. I'll email you an order confirmation. Feel better!
UK Regulatory Day: regulatory concept review and harmonization
Technology can help us explore the consumer experience.
The customer journey

NEW WORLD

ANALYSIS

PRODUCT CHOICE

DELIVERY DEVICE

RESULTS

LEARNING & DATA

OLD WORLD
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.
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.
Questions
Thanks for listening!

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innovate | access new markets | realise global opportunities