

A person wearing a light blue denim jacket over a white t-shirt is pushing a green-handled shopping cart in a supermarket. The cart is filled with fresh produce, including purple and green leafy lettuces, a bunch of green herbs, and two long baguettes. The person is holding a gold-colored smartphone in both hands, looking down at the screen. The background is blurred, showing other shoppers and supermarket shelves.

leatherhead food research

The battle for
consumer truth

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**



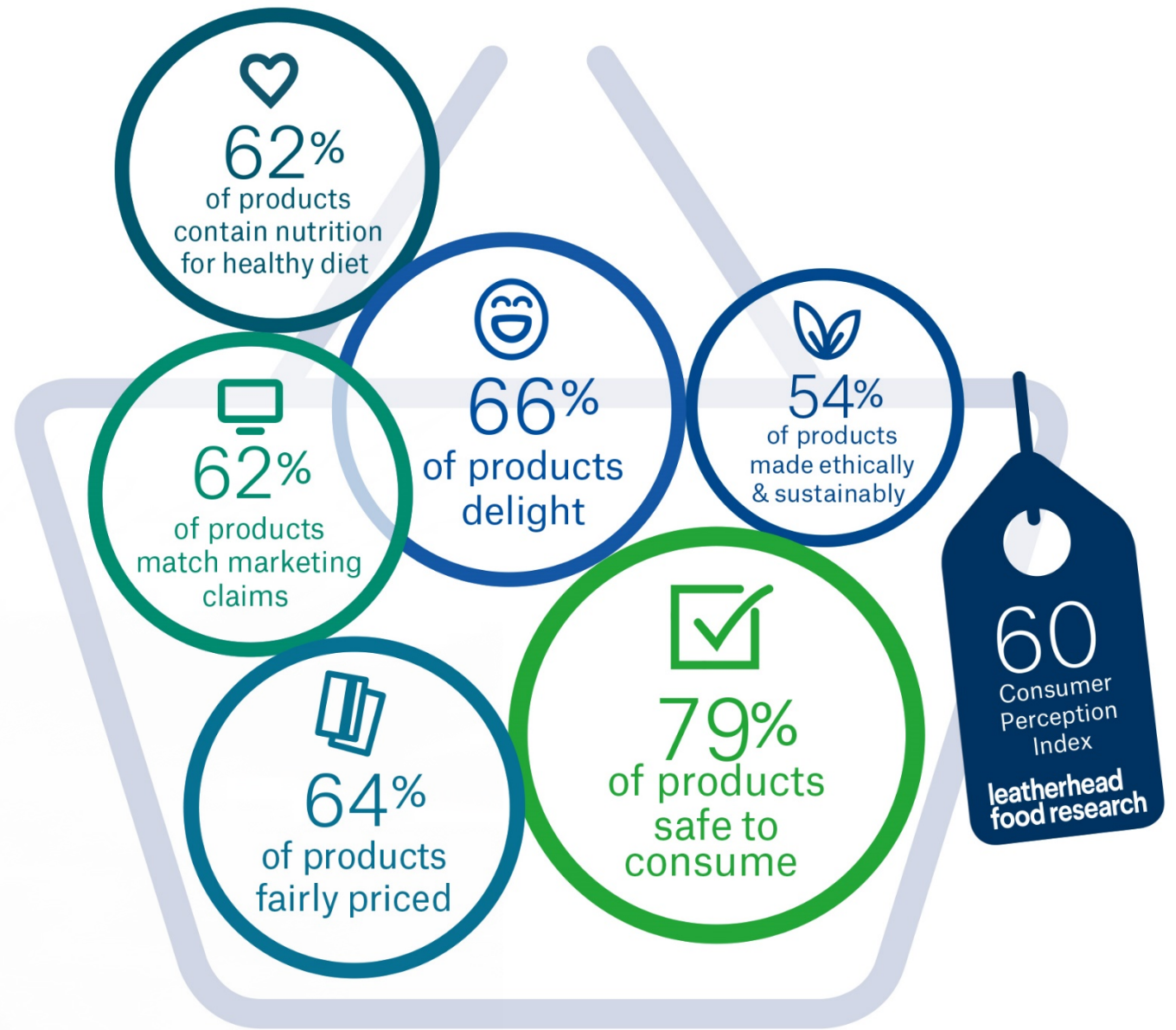
Preparing for **disruption**



'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

A woman with long blonde hair in a ponytail, wearing a light blue tank top and black leggings, is seated on a white surface. She is in a Padmasana (Lotus) position with her legs crossed. Her hands are pressed together in a prayer position (Anjali Mudra) in front of her chest. She is looking down at her hands. A blue arrow points to her right leg. In the top right corner, there is a blue box with the letter 'A'. In the bottom left corner, the text 'atherhead' and 'nd research' is visible.



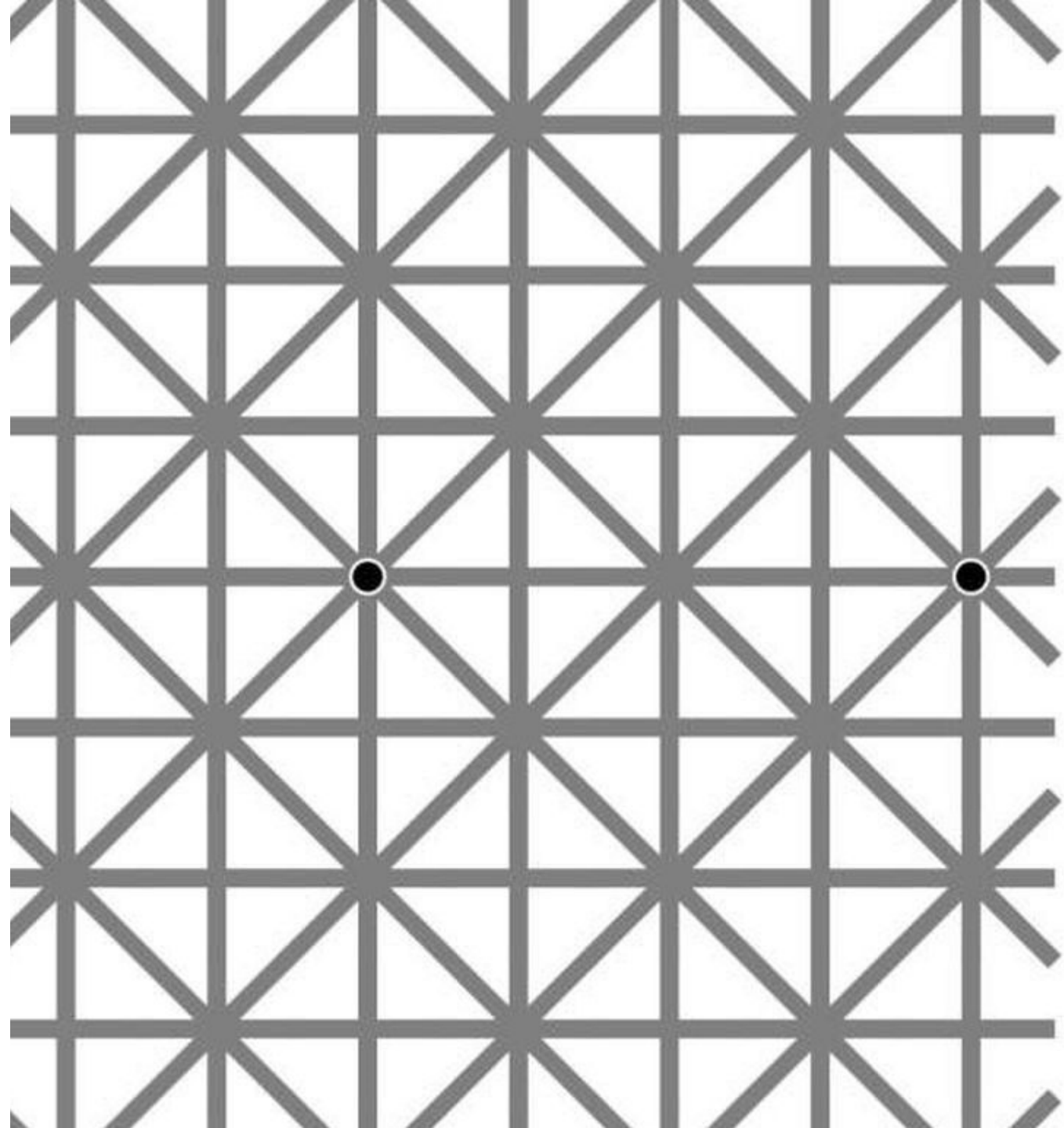


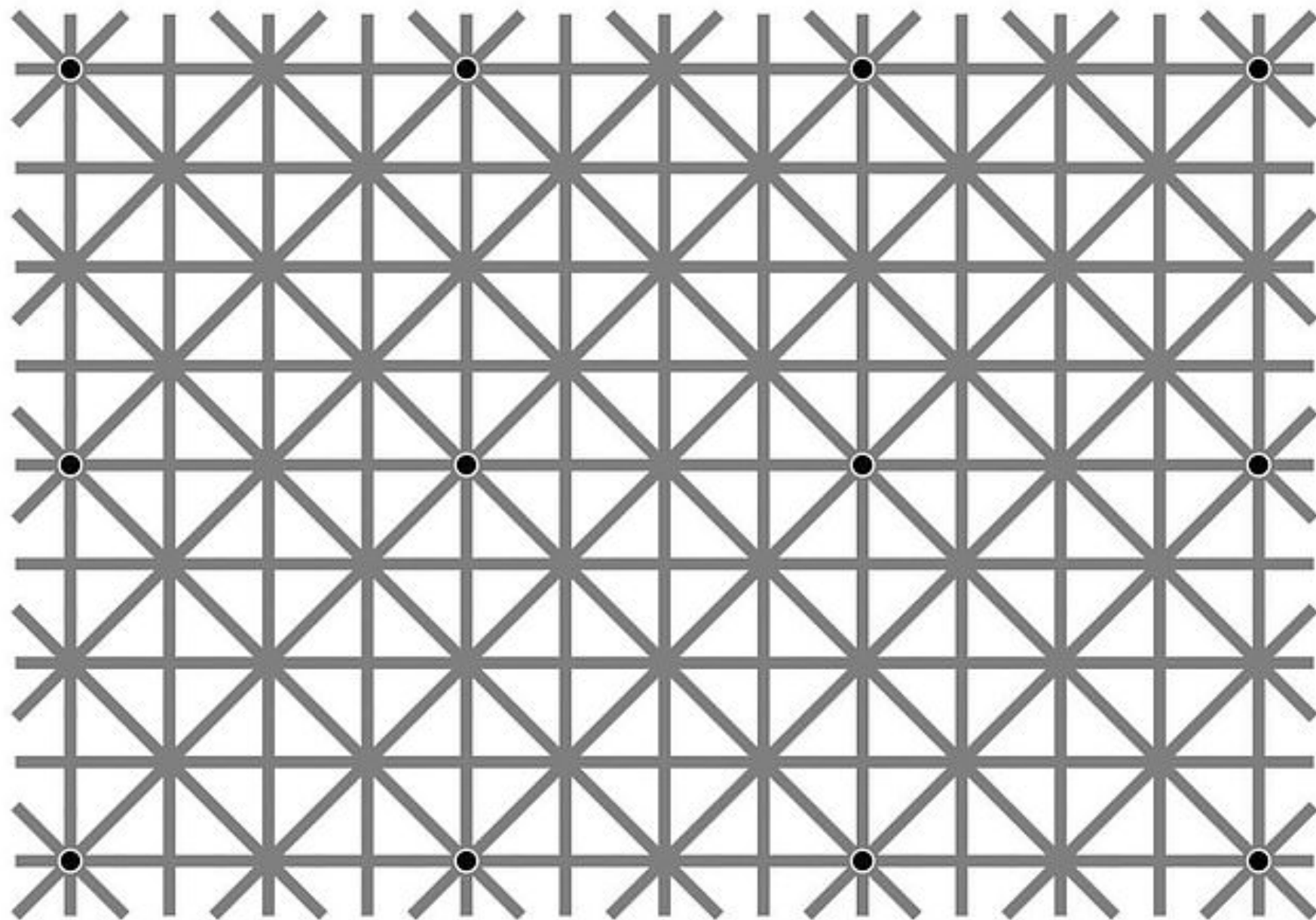
'Perception is more important than reality. If someone perceives something to be true, it is more important than if it is in fact true.'

– Ivanka Trump



How many dots can you see?







‘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



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.





Sensory
science

perception vs. reality

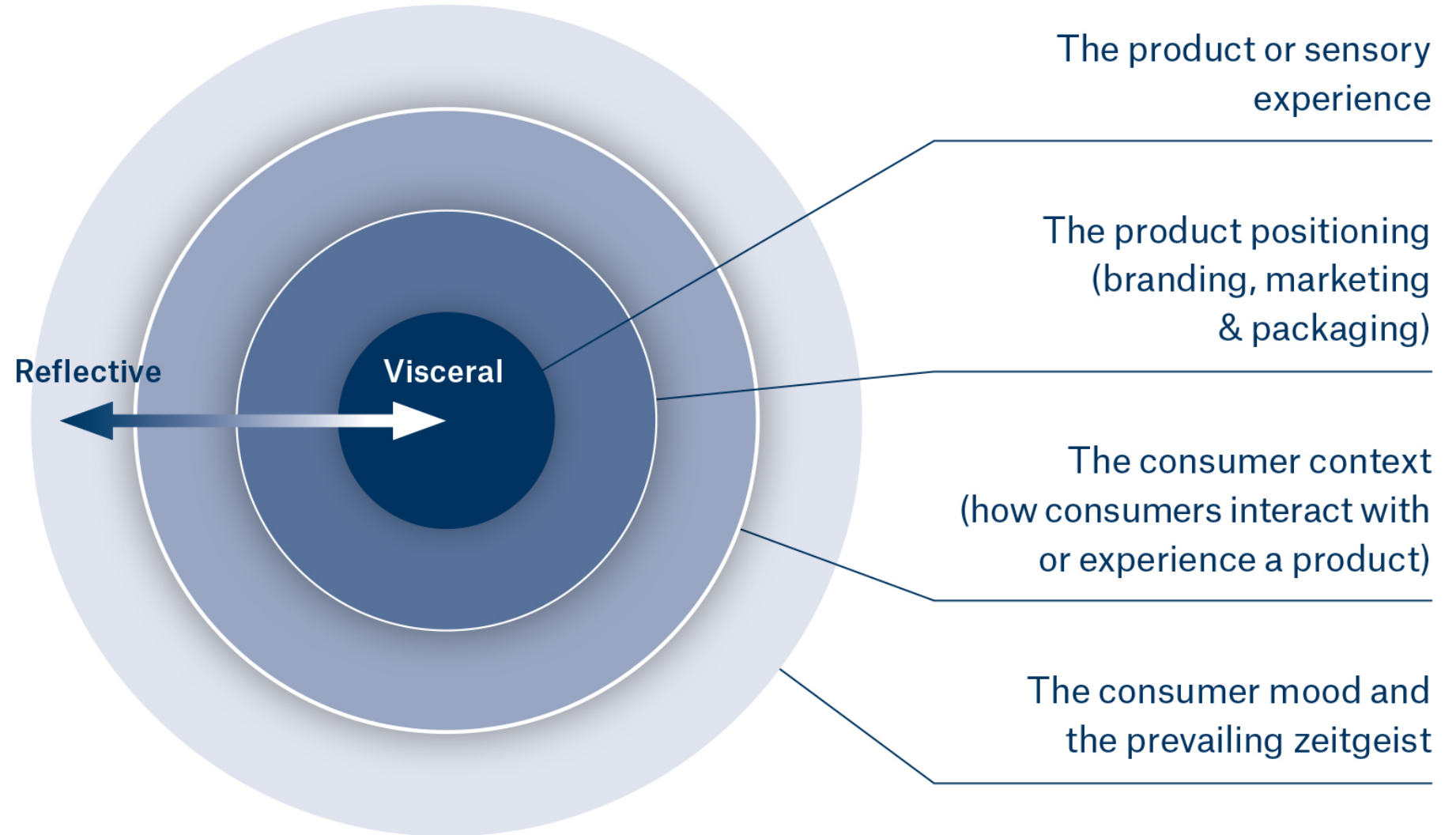
Consumer
attitudes

beliefs | needs | desires

Behavioural
science

psychology & economics

We believe it's important to think about 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.

Case Study: Mapping the opportunity for biofortified crops

Biofortified crops, created by means of conventional plant breeding methodologies, are being developed to tackle the global rise in hidden hunger and micronutrient malnutrition.

Leatherhead carried out a project to investigate the market acceptability of biofortified crops as an ingredient within the food & beverage industry, considering the challenges from key regulatory jurisdictions (UK, EU and USA), technical, and consumer insight perspectives.

Using a robust programme of qualitative and quantitative research with consumers, we were able to explore consumer acceptance, develop an understanding of the consumer challenges and opportunities on the journey to bring bio-fortified crops to market, and define possible ways to position biofortified crops.



Case Study: Development of clean labelling for functional ingredients

An ingredients' manufacturer wanted to develop meaningful labelling to support the marketing of a new vegetable based protein ingredient.

Following a regulatory review of labelling options, Leatherhead conducted consumer insight with US consumers to determine which would be most likely to have a positive influence on consumer's purchase intent.

The insight gave clear direction on how to market the new ingredient as part of their wider Clean Label Ingredient programme. The study also explored consumers' engagement with product labels in general and the impact that label engagement would make to shopping choices.



Join our free, [member-only webinar](#)

Emma Gubisch explores how consumer and sensory research is facing disruption

Wednesday 2nd October,
3pm BST



Thanks for listening!

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Questions

leatherhead food research

innovate | access new markets | realise global opportunities