

leatherhead food research

The battle for
consumer truth

How consumer and sensory
research is facing disruption

Come see us on stand L7

What does the future hold for consumer & sensory research?





Emma



Dave



Matt



Rhys

1

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2

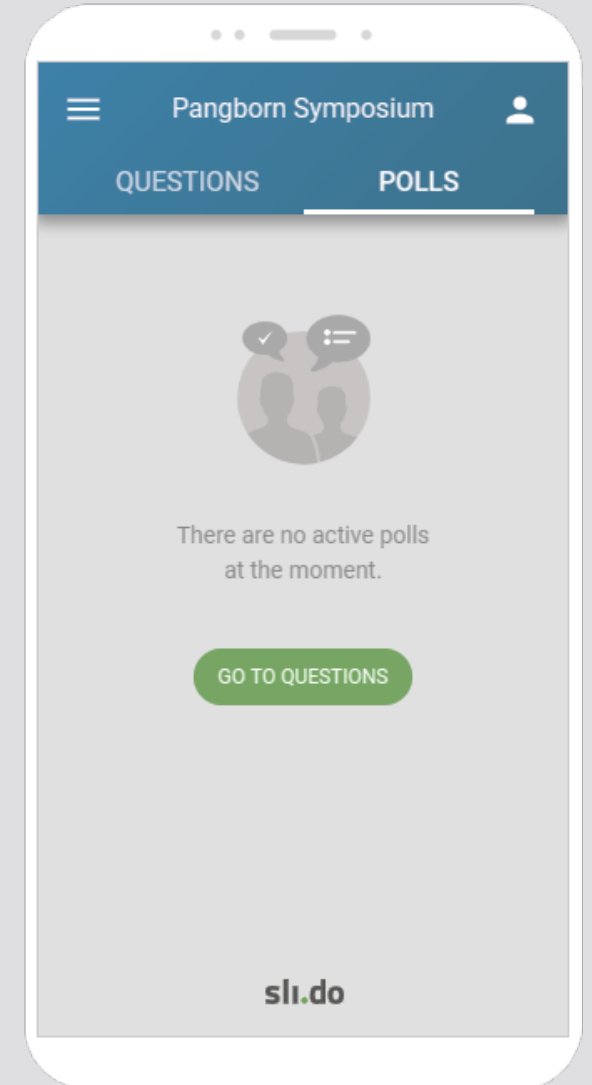
Enter
#LFR19

3

Join the
discussion

Send us questions and comments throughout the session
Vote on your favourite questions using the thumbs up

WIFI password – Compusense2019



We'll be picking the winner of our product innovator challenge later ...





Amal



Juliette



Gabriel



Iona



Lisa & Clark

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 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**

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

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

1 in 10
are trying to cut
gluten from
their diet

1 in 3
are trying to
cook more from
raw
ingredients



'You see what is happening with a lot of CPG companies – they have a decline in top line sales and slow or negative growth.'

– Senior Director Technology Development





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

— UK consumer





'I think the bottleneck is that the industry has been a high-volume, low-margin business to date and to go from that to a different model is difficult.'

– Open Innovation
Director, Food Brand





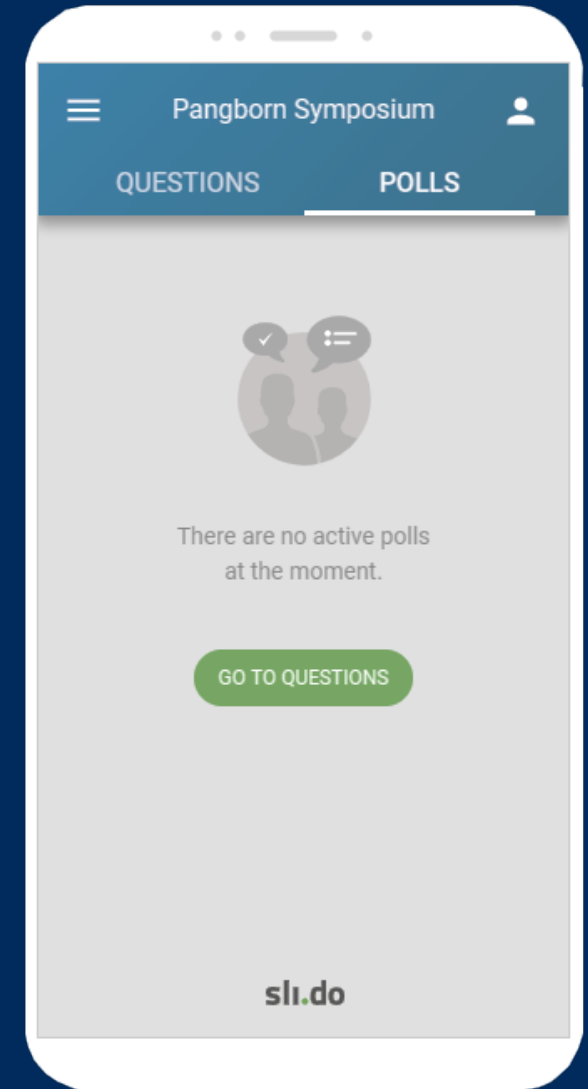
'It's easy for smaller players to enter the market and give consumers what they are looking for. There are not the barriers there used to be ... and they can drive visibility in a similar way to the big CPG companies.'

— Technology
Development, Food Brand



What are the key challenges for companies making consumer products?

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Let's see your questions and comments

Searching for consumer **truth**



Searching for consumer **truth**



Searching for consumer truth



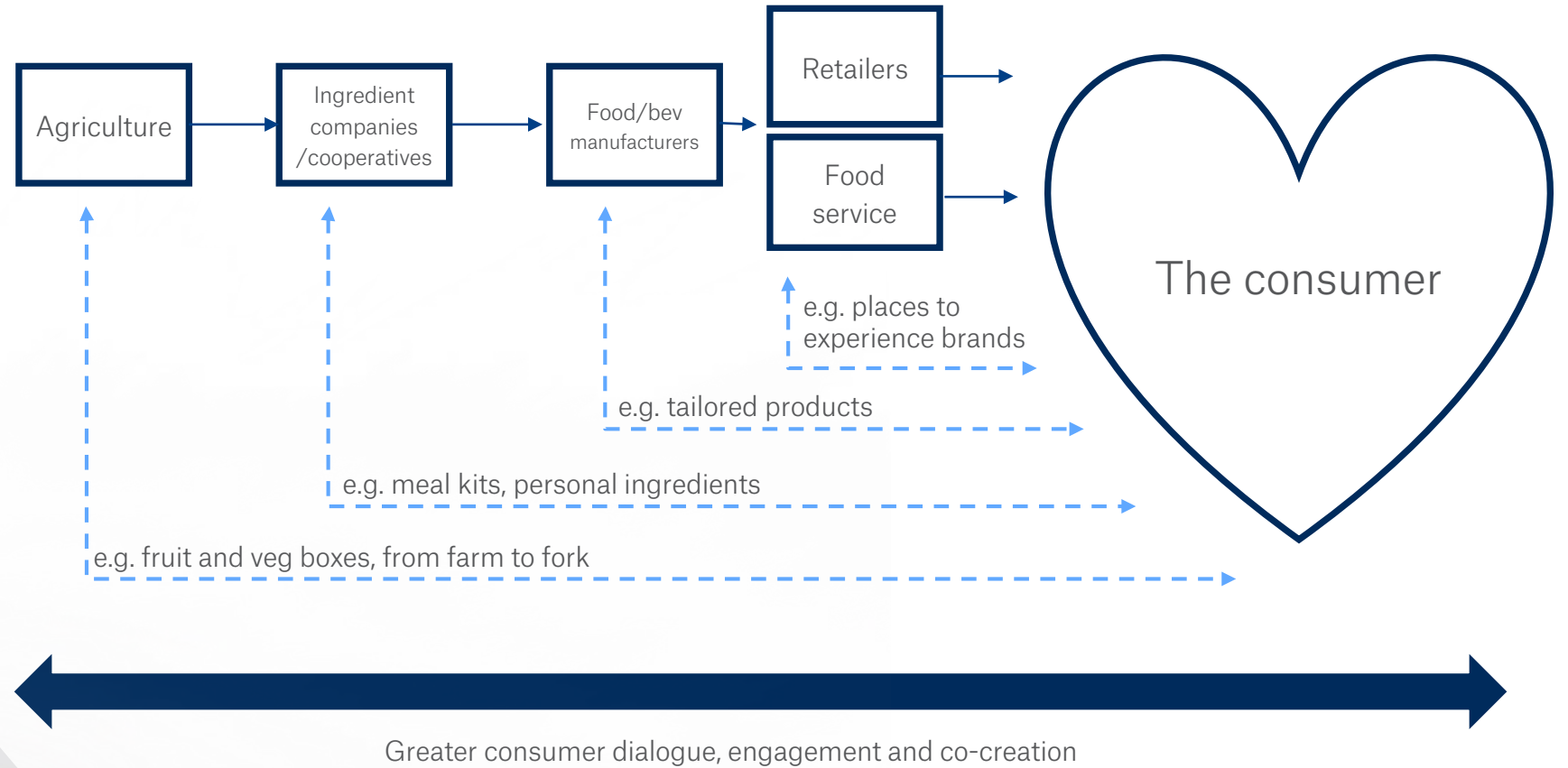
Searching for consumer truth



'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





*'If I had asked people
what they wanted, they
would have said a faster
horse.'*

– Henry Ford (allegedly)



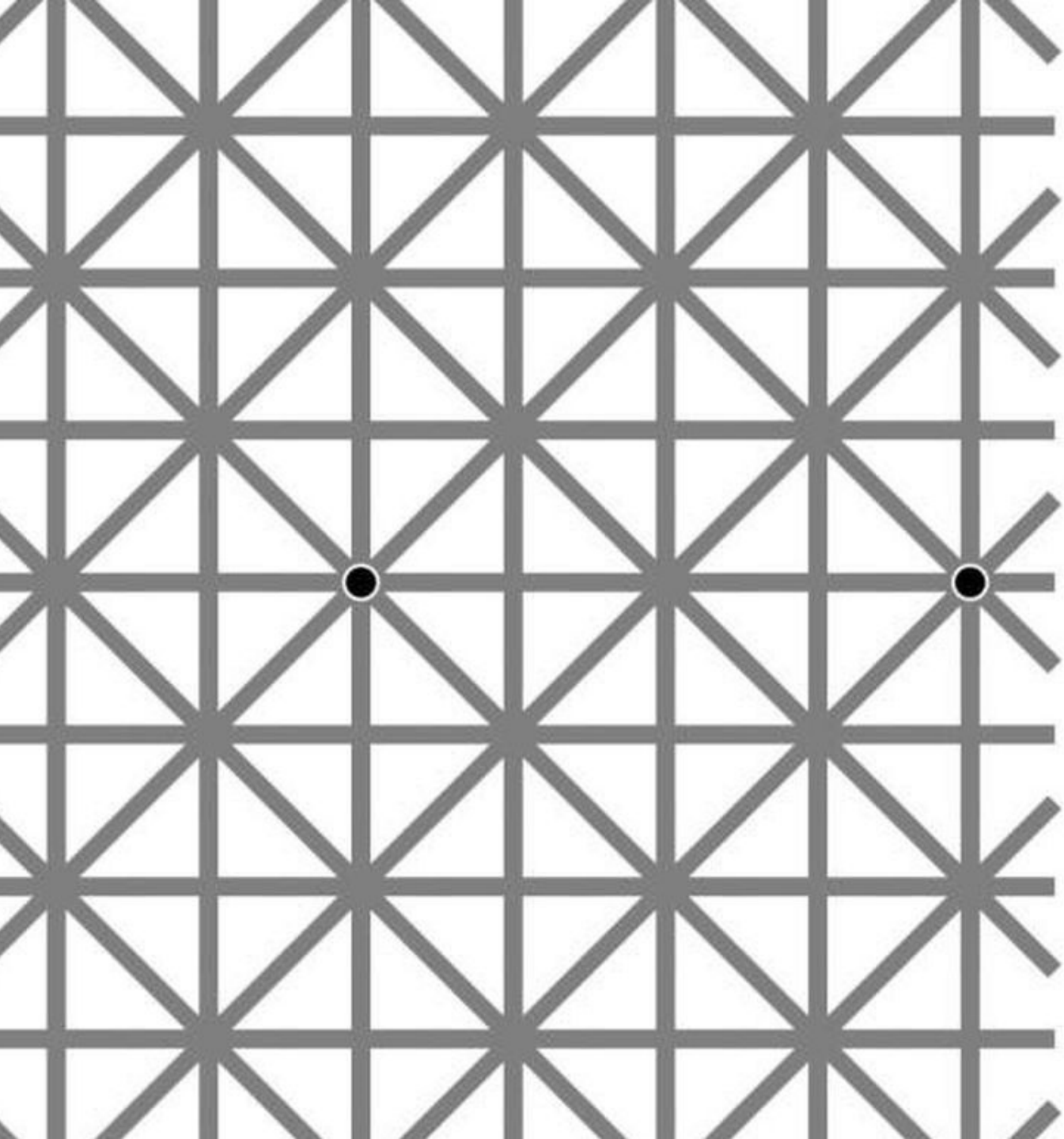


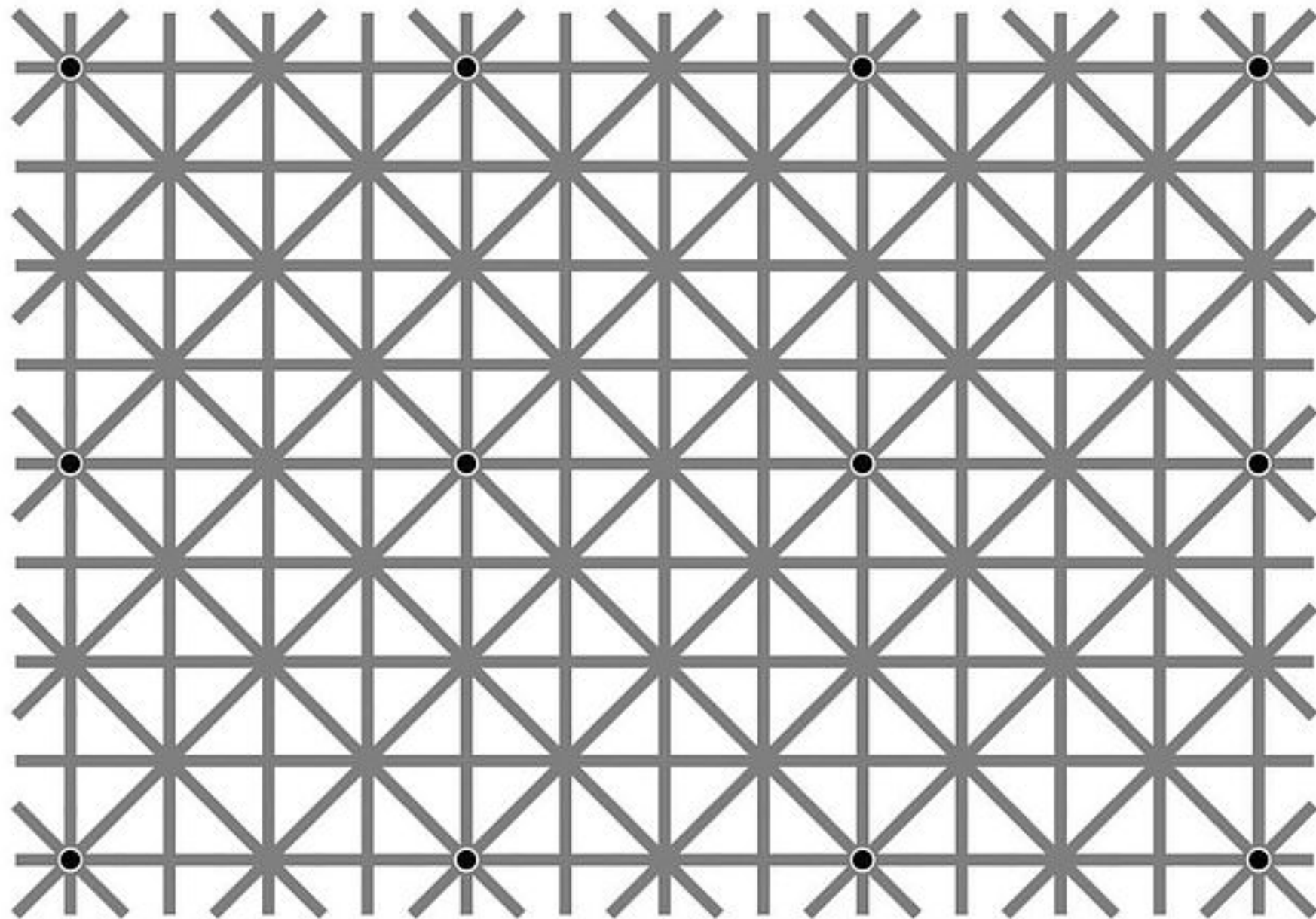
'Perception is more important than reality. If someone perceives something to be true, it is more important than if it is in fact true.'

– Ivanka Trump



How many dots can you see?







VOTE

'It was a big polling miss in the worst possible race. On the eve of America's presidential election, national surveys gave Hillary Clinton a lead of around four percentage points.'

– How did the polls get it wrong?, The Economist





'You've got rigour but we've got vigour.'

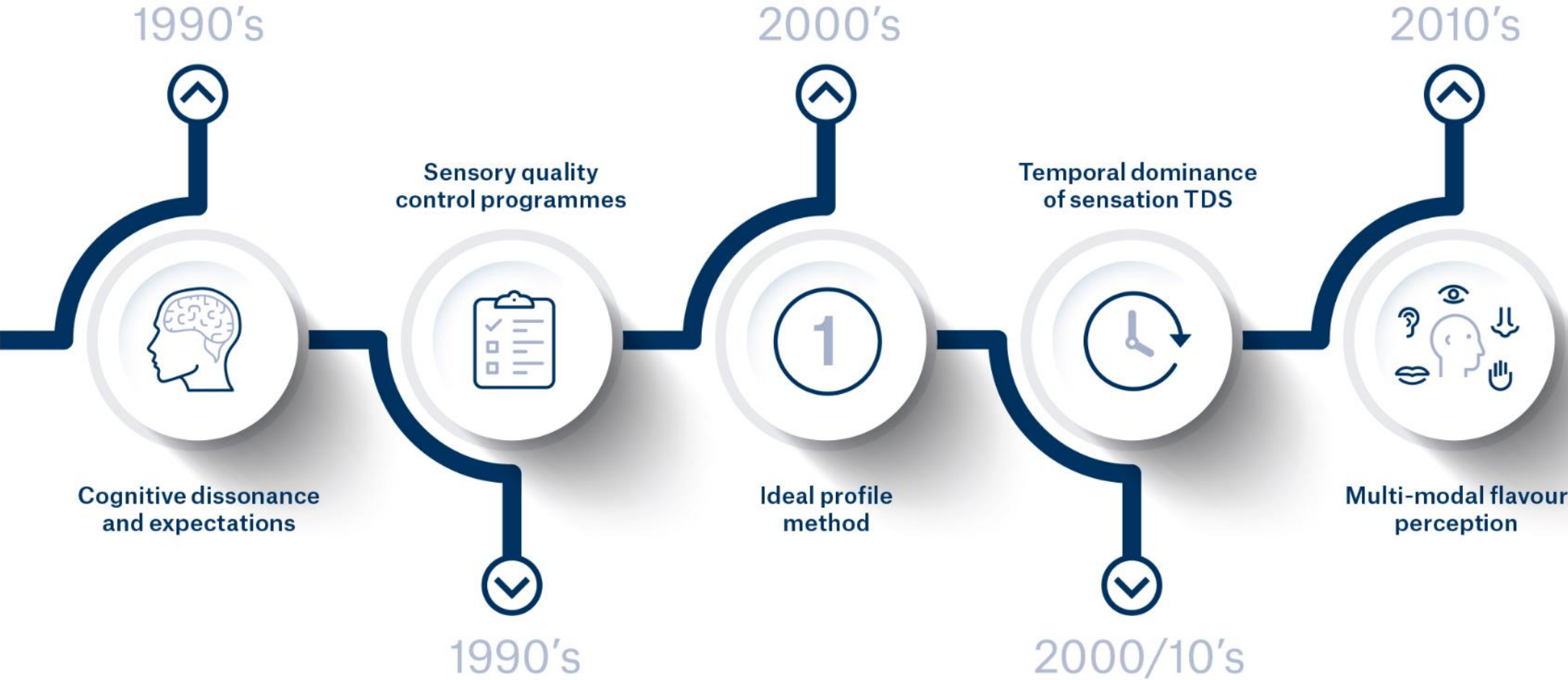
– Tech start-up in consumer research field



What does this
disruption mean for the
sensory & consumer
research world?



Sensory science has rigour and history on its side but let's not be blinded by method



Are we overly
focussed on
method instead
of the challenge
we are trying to
solve?



Are we selling
the story of
sensory science
with vigour and
excitement to
rival the new
players who are
ripping up the
rule book?





Are we looking at only part of the story when we think about sensory science?



TASTE



SIGHT



TOUCH



SMELL

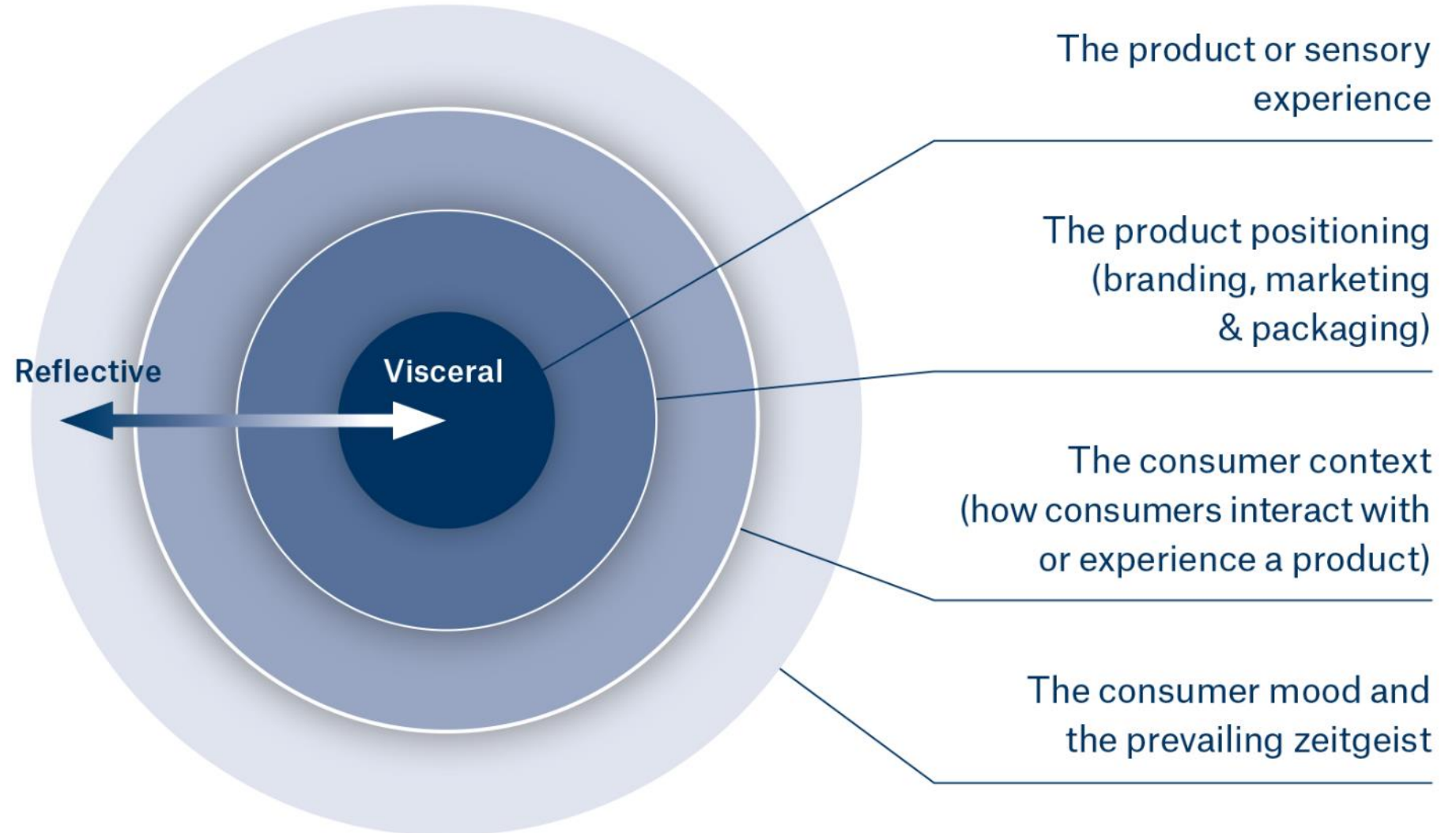


HEARING

Are we thinking
enough about the
environment
within which
consumers
engage with
products?



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.

You took the innovation challenge on our stand designing water products of the future





a third

Chose promising
purity as one of
their priorities

a quarter

Chose playing
with form as one
of their priorities

a quarter

Chose using taste
and aroma as one
of their priorities

1 in 5

Chose
personalisation
as one of their
priorities

a third

Chose
smart/intelligent
as one of their
priorities

1 in 5

Chose devices to
dispense
as one of their
priorities

Half

Chose cutting
plastic waste as
one of their
priorities

Half

Chose fighting
climate change as
one of their
priorities

Half

Chose low or no
packaging waste
as one of their
priorities

4 in 10

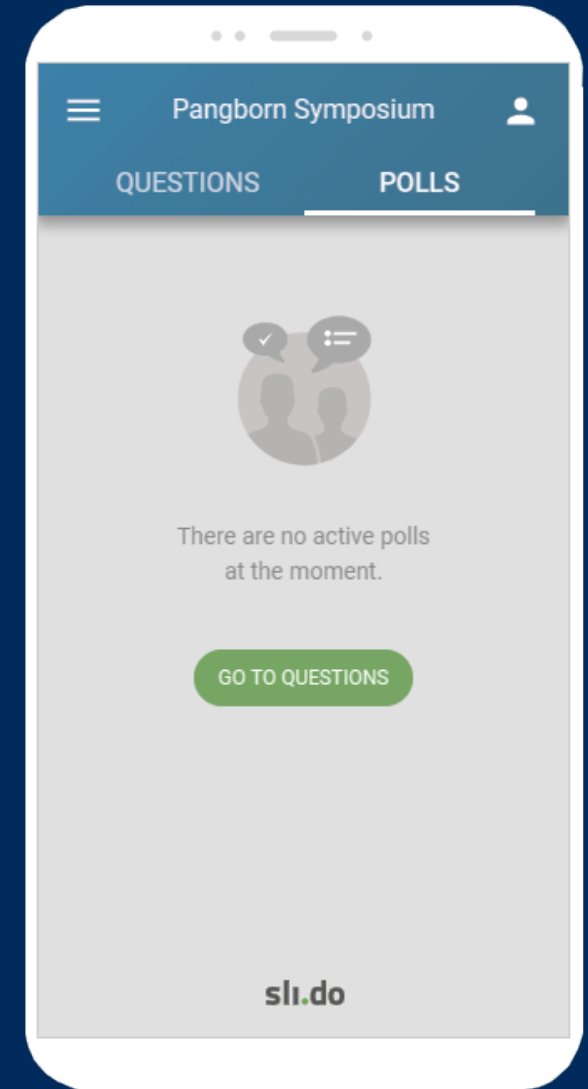
Chose re-usable
water containers
as one of their
priorities

Half

Chose managing
water scarcity as
one of their
priorities

Is sensory science
evolving fast enough?

What are the barriers
to sensory science
evolving?



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Let's see your questions and comments



Are we prepared to go beyond the world of sensory science to learn from other disciplines?



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

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

Let's see how your intuitive brain works...

What's the right answer?



A bat and ball cost Euros 1.10 in total.
The bat costs 1 Euro more than the ball.

How much does the ball cost?

5 cents



What's the right answer?



If it takes 5 machines 5 minutes to make 5 bottle tops.

How long would it take 100 machines to make 100 bottle tops?

5 minutes



What's the right answer?



In a lake, there is a patch of lily pads. Every day, the patch doubles in size.

If it takes 48 days for the patch to cover the entire lake, how long does it take for the patch to cover half of the lake?

47 days



The interplay of the two cognitive systems creates biases



System 1

Fast

Intuitive

Automatic

Uncontrolled

Effortless

System 2

Slow

Thoughtful

Reflective

Controlled

Effortful

Human bias: the halo effect



Human bias: the availability heuristic



Human bias: the anchoring effect



Human bias: the focussing illusion





'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



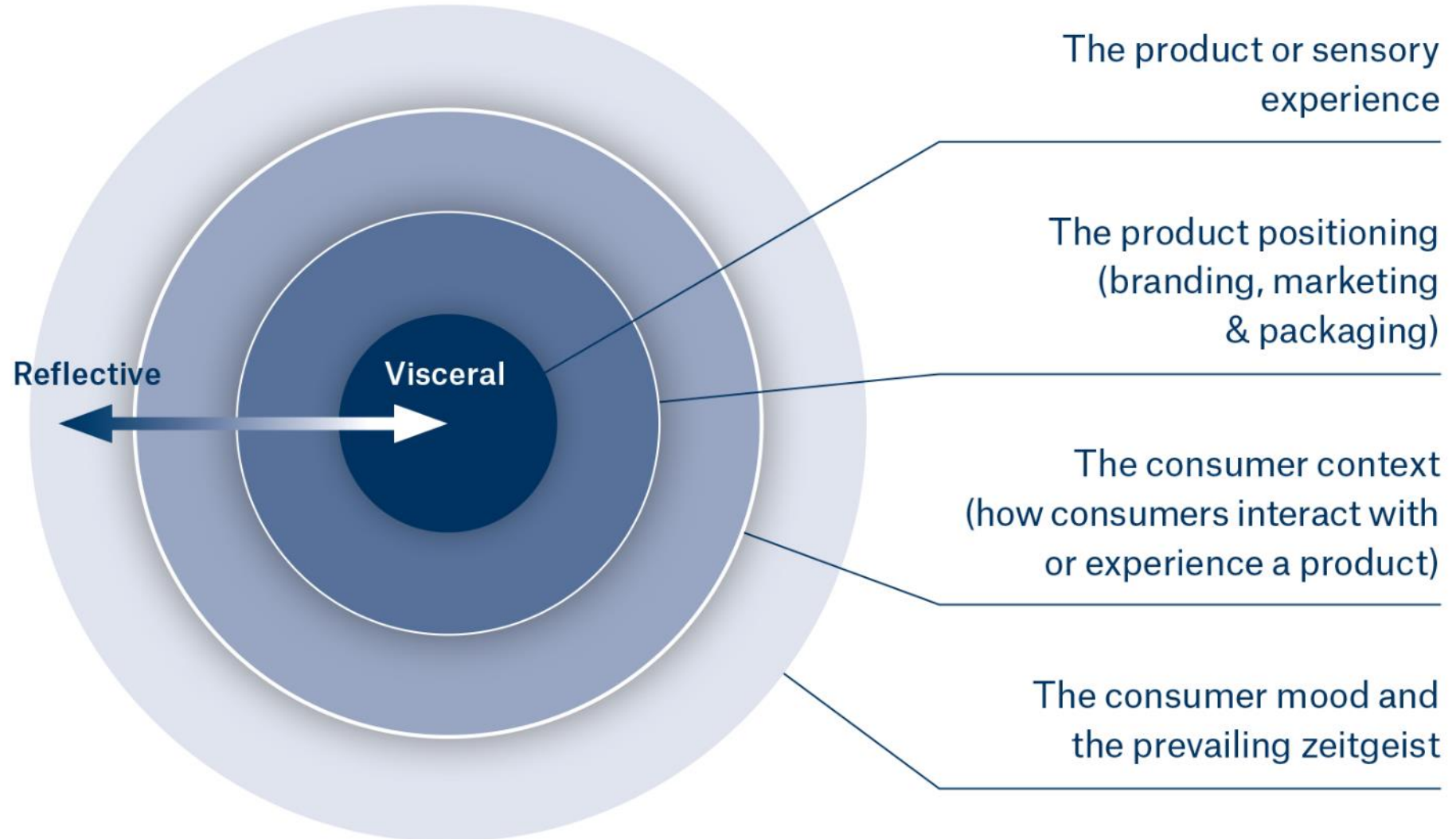
How context influences us in practice



How context influences us in practice



We believe it's important to think about the product eco-system



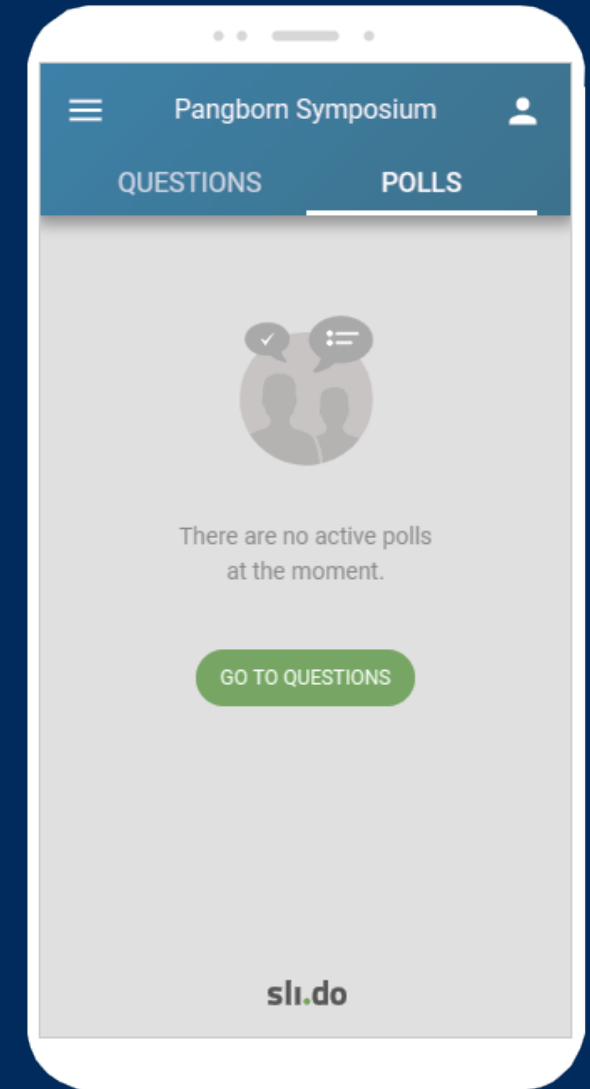
What is the
opportunity for
blending
behavioural
science with
sensory science?



Are we applying ethics to the way we carry out behavioural science?



What are the opportunities for moving sensory science forward?



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Let's see your questions and comments



Are we really utilising technology to its full advantage or just using it to do what we have always done?

What can
technology allow
us to do?

Where can it take
us?



Touchpoints with technology – functionality and benefits



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



Reaching consumers and understanding their preferences has never been so easy



Changing sphere of influence



Friends



Professionals



OLD WORLD



Brand

INFLUENCES



Changing sphere of influence



Friends



NEW WORLD



Bloggers

Professionals



Brand

Social media



INFLUENCES



Vloggers



The danger of
mis-information

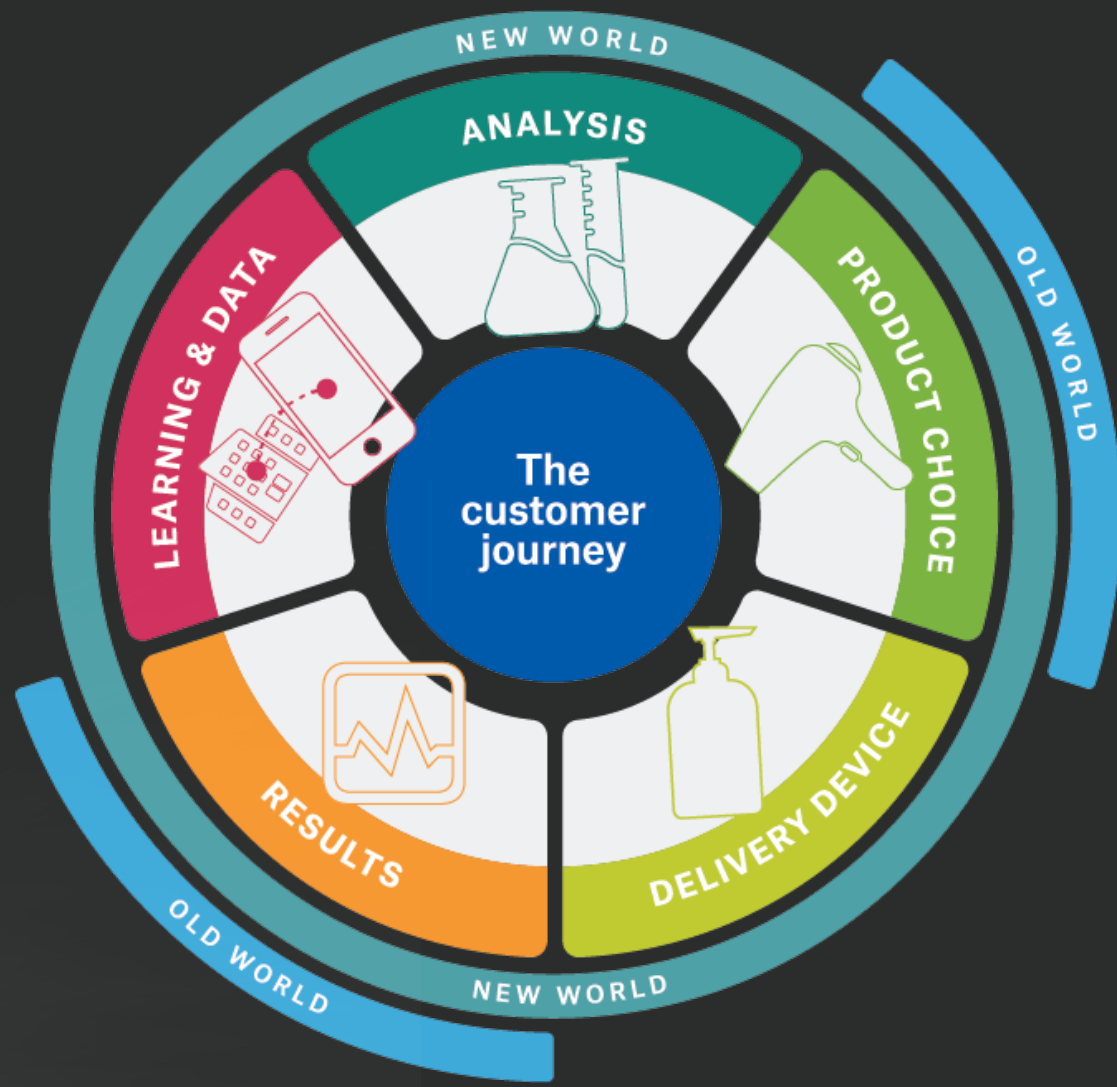


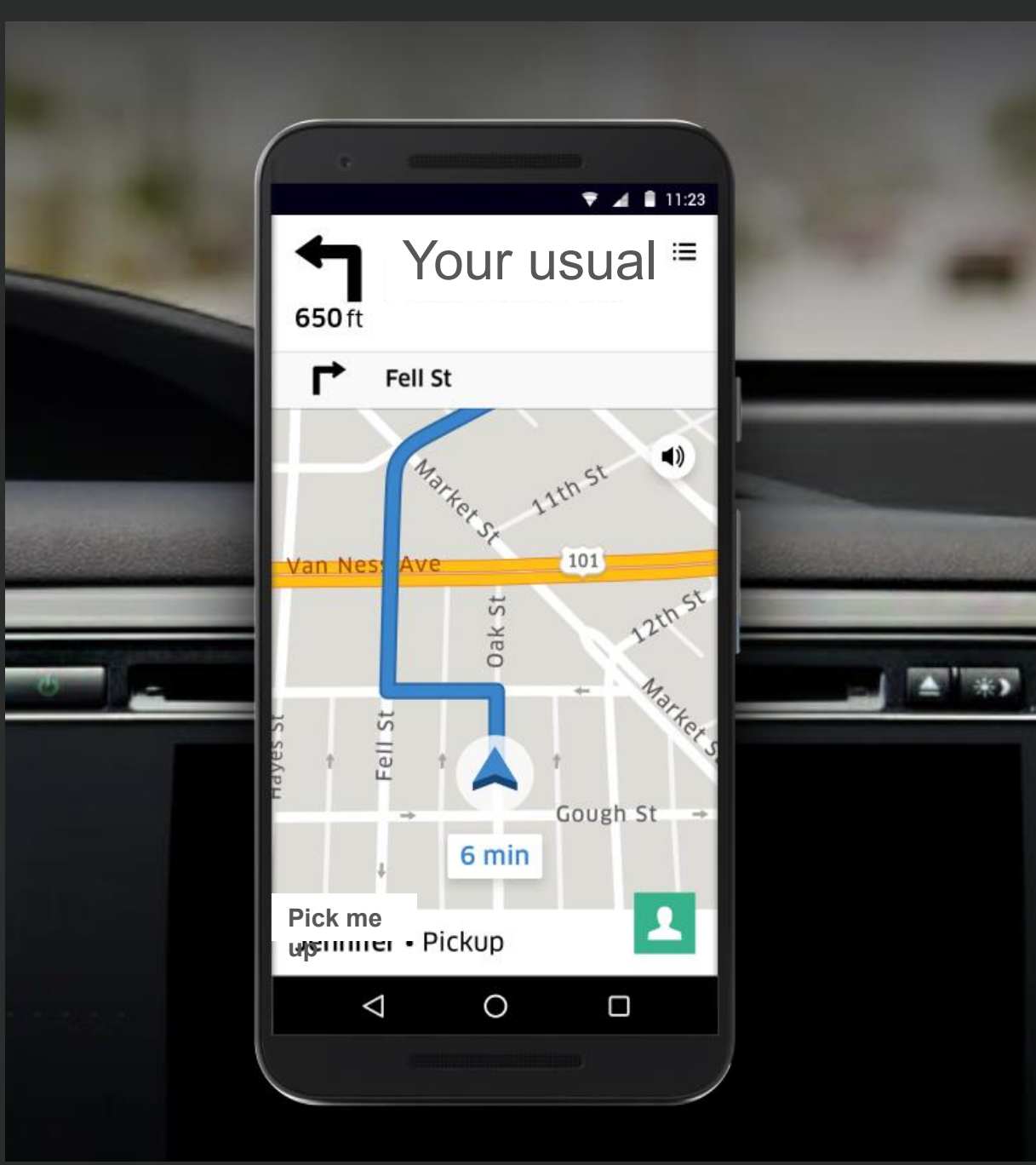


It's about what technology can enable us to do not about using technology to do what we have always done



Let's look at examples of how these technologies can help us getting closer to consumer experience







Gaming world to
immerse you in
experiences and a level
of engagement akin to
real life- narrative
masters



TOMATO
Solanum lycopersicum

AVG. 123 grams - 22 kcal

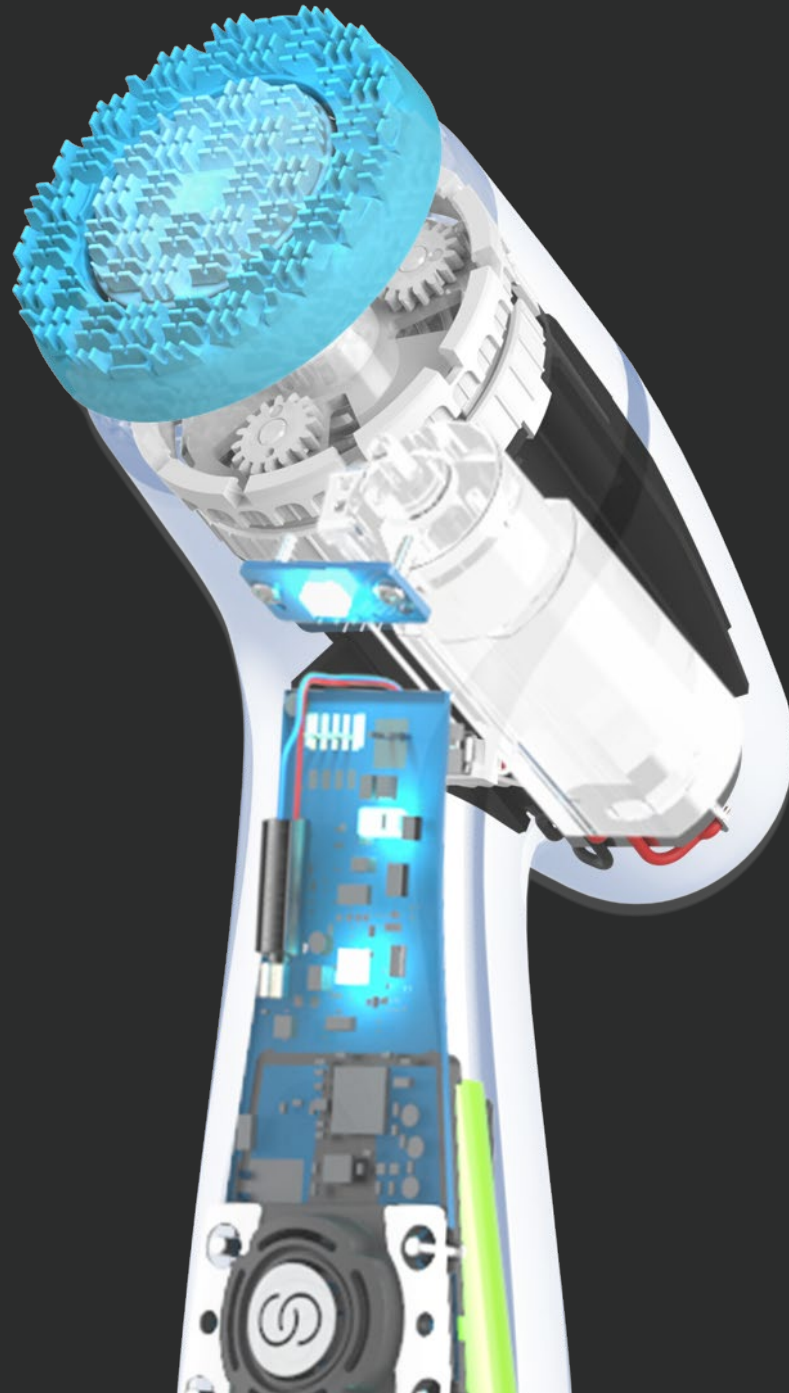
Nutrition Facts: Tomatoes, red, ripe, raw - 100 grams

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





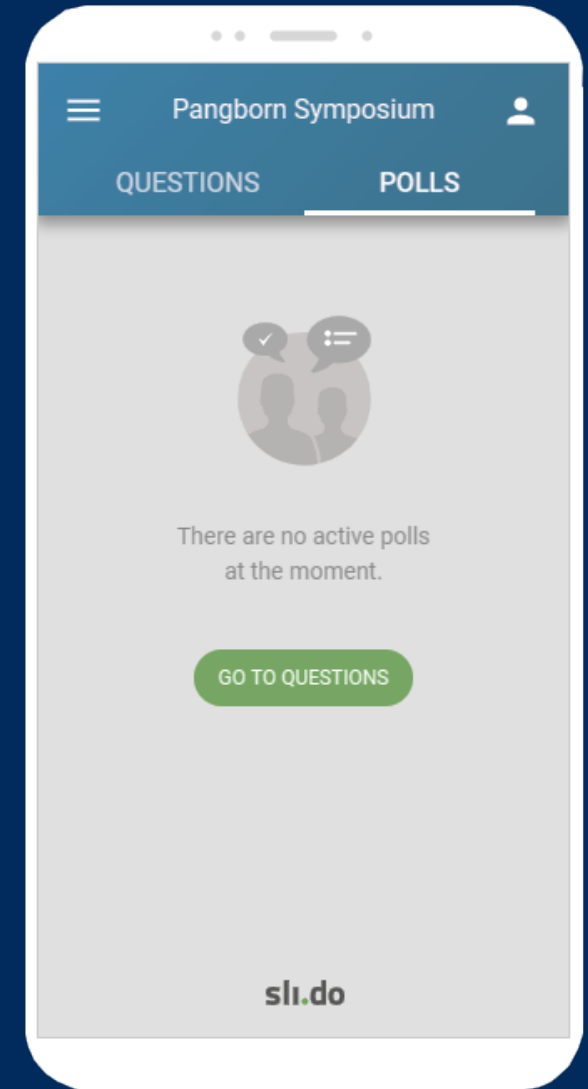
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But let's not let
technology own
us and be our
masters



What are the opportunities for using technology in sensory and consumer science?



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Let's see your questions and comments

The future for consumer & sensory research









The fusion of offline
and online worlds





Understanding human
experience in real-time

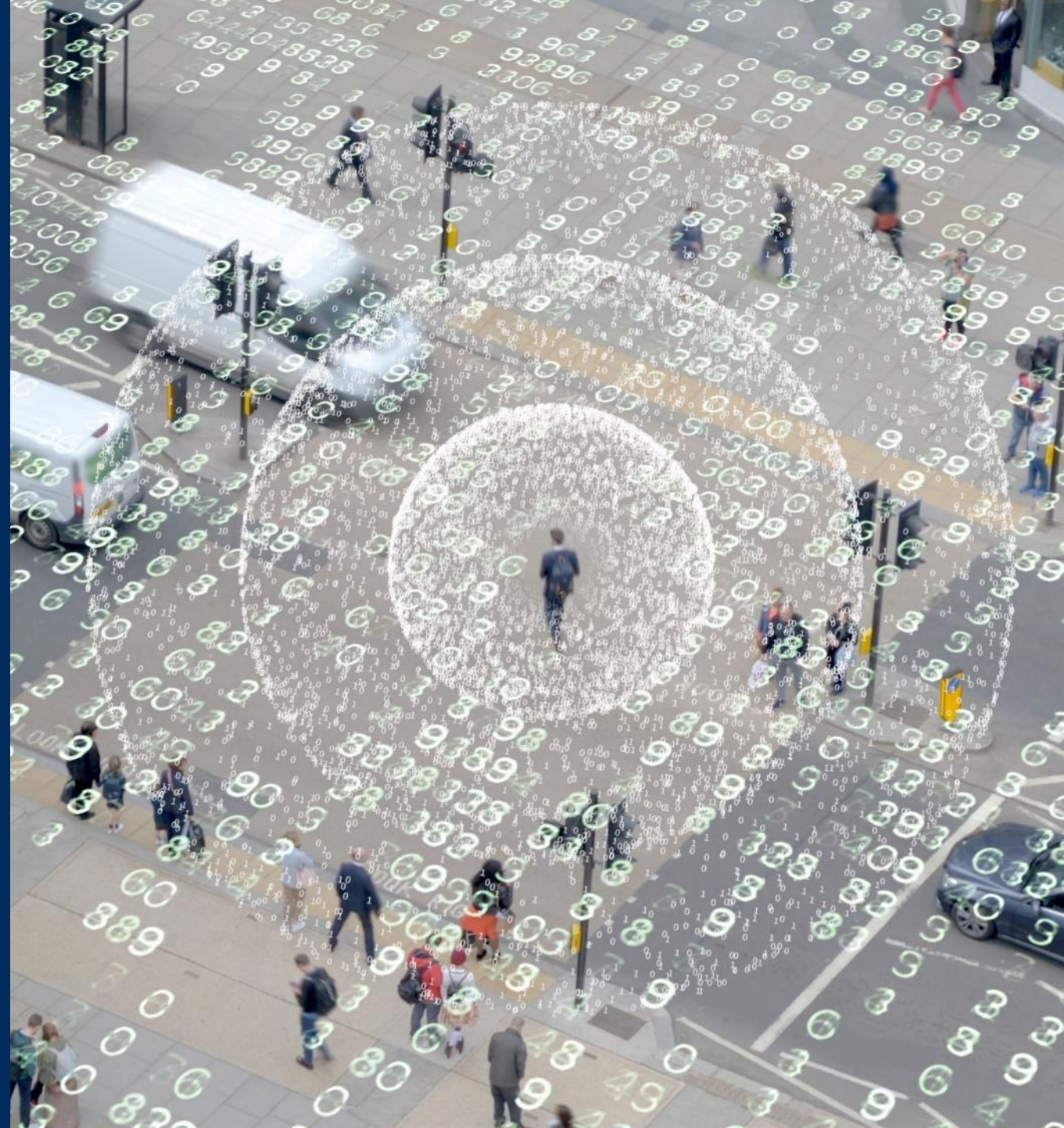




Reflecting the nuance,
messiness, complexity
and beauty of human
experience

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

Touchpoints with technology throughout the day –customer



Understanding 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

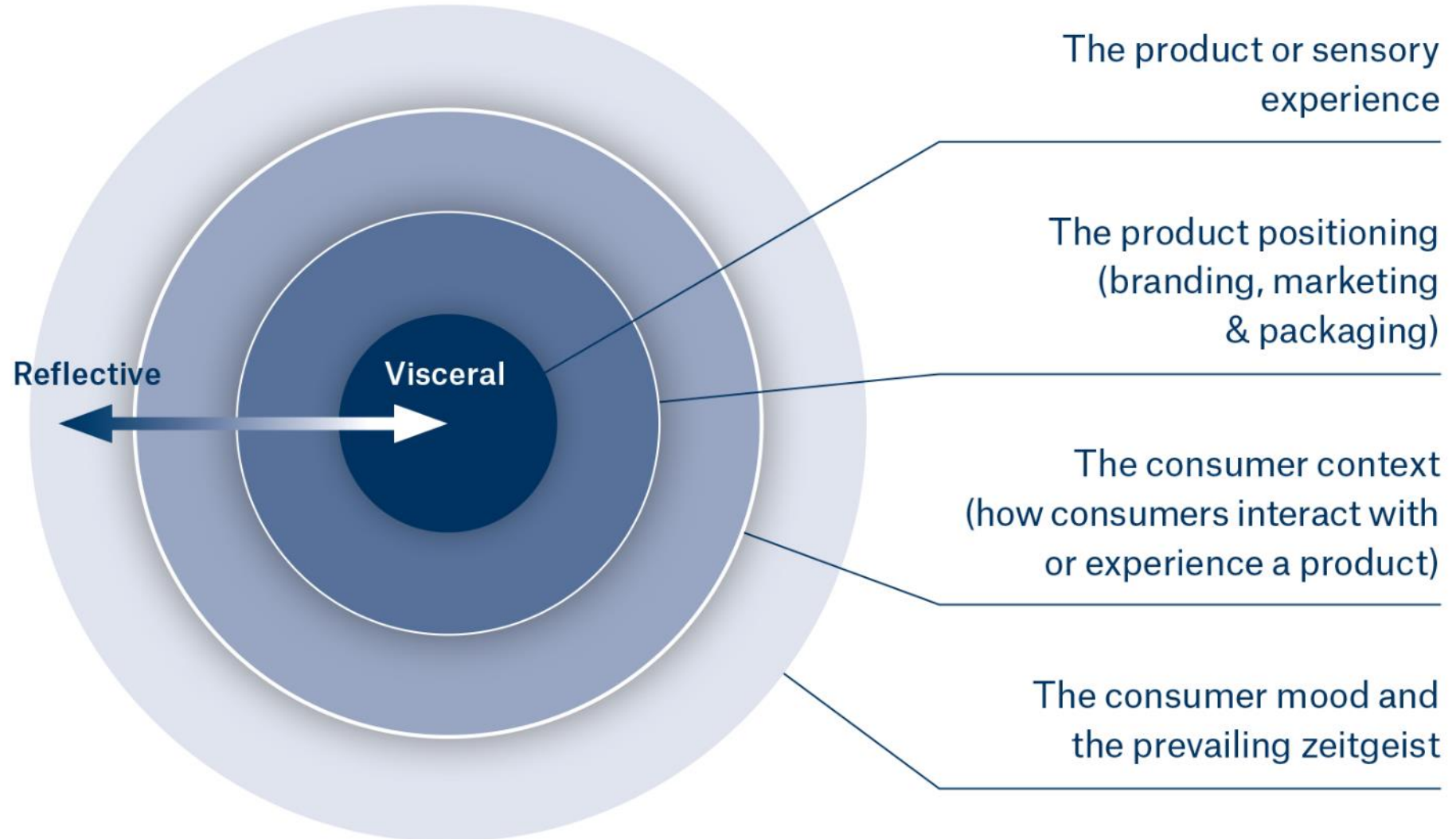
beliefs | needs | desires

Behavioural
science

psychology & economics

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

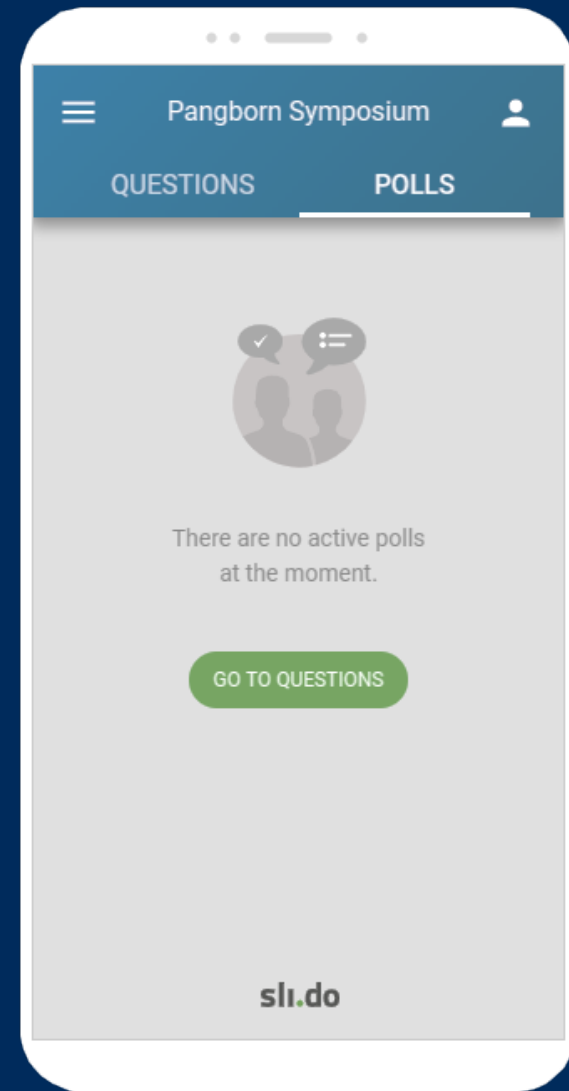
We believe it's important to think about the product eco-system



Lets pick our winner of the product innovator challenge...



Questions



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Facing disruption



Consumer truth



Understanding behaviour



Technology enabling



The future

Thank you

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