The Thinking House

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Consumer Insight into Gluten Free in Ireland

April 2017

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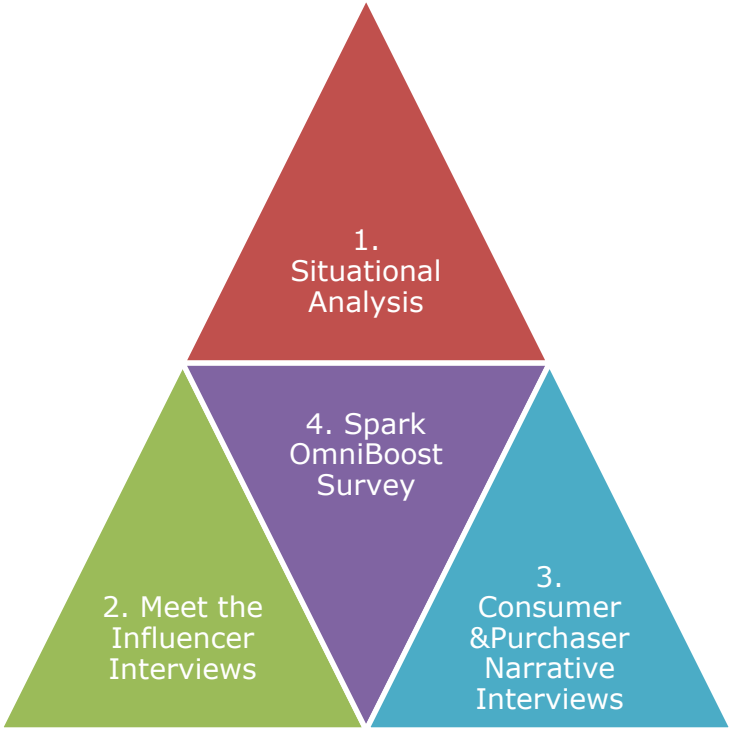
Background & Objectives

The research had 5 key Objectives



Ultimate aim = identify core consumer insights to create recommendations for Irish food & drink companies

Our research had 4 parts & pre-task



Research Partner: SPARK The Strategic Research Agency

YOUR STORY PRE-TASK

Please tell us the story of how you came to follow a Gluten Free lifestyle:

Tell us about what was happening in your life before you started the Gluten Free diet, what changes you made, what tests were done (if any) and what changed afterwards.

Please include your thoughts, feelings, both good and bad at each step of the way

Consumers= someone who buys and consumes Gluten Free for themselves. **Purchasers =** someone who buys Gluten Free for someone else

The research allowed us to unearth the micro and macro aspects of the Gluten Free landscape

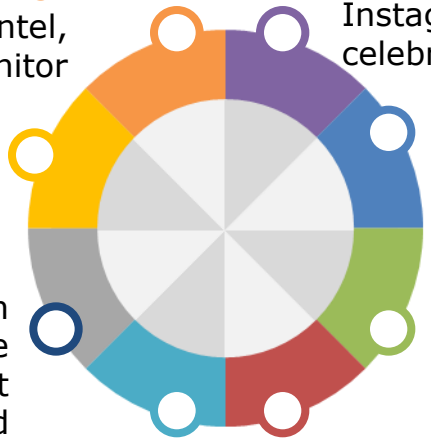
Channels used for the Situational Analysis

Published reports commissioned for Bord Bia: Nielsen, Kantar, You.gov, Mintel, Euromonitor

Internet Search: Keyword: Gluten Free, Coeliac, Gluten Intolerance

Retail Websites/visits: online and in store – 5 Irish retailers, and the SuperValu Food Academy in ROI but also beyond

News: News and entertainment articles about Gluten Free



Social Media: Pinterest, YouTube videos, Twitter, Instagram, Facebook, boards.ie, Bloggers, celebrities

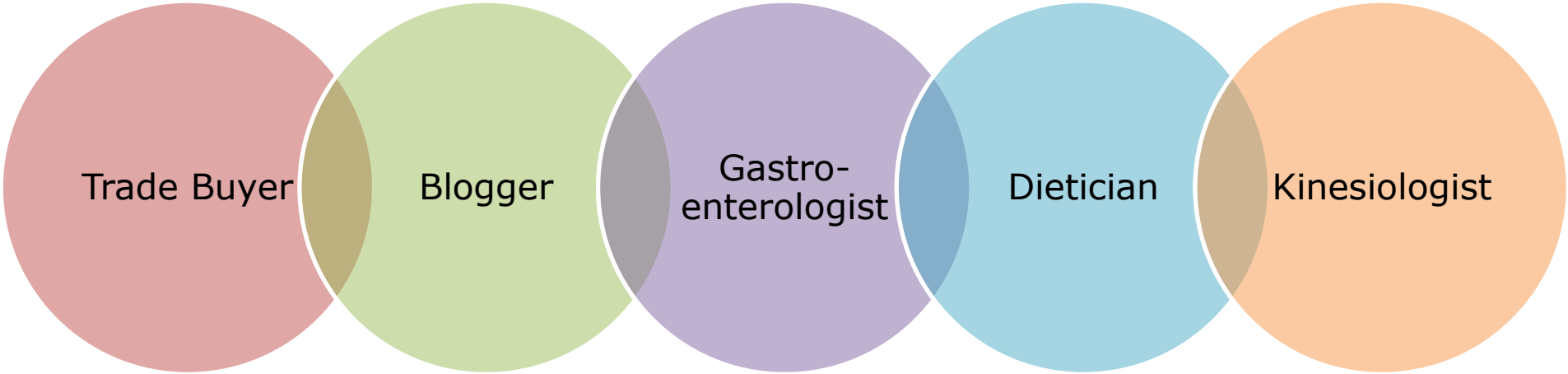
Trend Channels: Google Trends, Trend Hunter

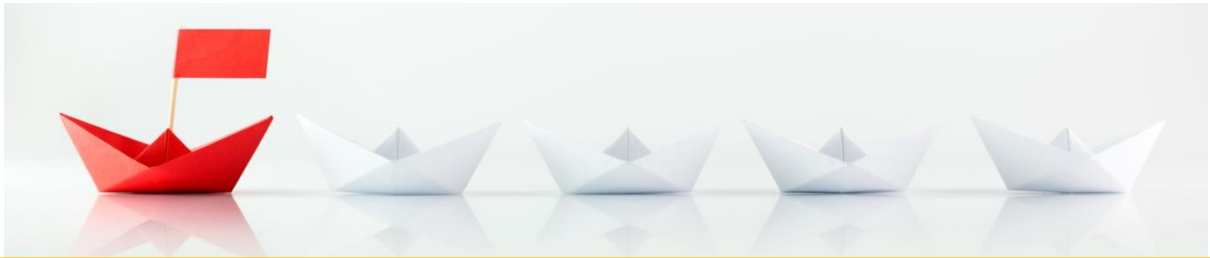
Gluten Free/Coeliac Organisations: websites and information materials

Gluten Free/Coeliac Trade Shows: websites and information materials

The result is an overview of key trends both at a local and global level

Key Influencers– Who we spoke to





Fieldwork took place
between 30th January – 15th February 2017

Key Influencers– Who we spoke to

Trade Buyer

- Independent health food store based in a high footfall area of Dublin, second generation family member focused on organic, fairly traded, ethnic and special dietary foods. It has been around for decades and now has both a retail and online offering

Blogger

- Blogger based in Ireland focusing on Gluten Free and lifestyle, Coeliac herself and set up a blog based her experience of lack of information , member of the Coeliac Society of Ireland

Gastroenterologist

- M.D.,
- Fellowship of the Royal College of Physicians of Ireland (FRCPI)
- Specialist gastroenterologist with an interest in Inflammatory Bowel Disease, Coeliac Sprue among others

Dietician

- With over 20 years' experience working in nutrition and dietetics
- Degree in Human Nutrition and Dietetics in an accredited university, a Masters in European Food Regulation
- CORU registered, member of the Irish Nutrition and Dietetic Institute (the professional body for Dieticians in Ireland)

Kinesiologist

- Complementary healthcare practitioner using kinesiology muscle testing together with analysing diet and lifestyle
- A Member of the Association of Systematic Kinesiologists in Ireland

Fieldwork took place
between 30th January – 15th February 2017

The Consumers – Who we spoke to

Int	Type of Consumer	Gender	Soc	Profile*	Area
1	Lifestyle	F	BC1	Pre Family	Dublin
2	Intolerant	F	C1C2	Pre Family	Clare/Galway
3	Lifestyle	F	BC1	Pre Family	Tipp/Limerick
4	Lifestyle	F	C1C2	Pre Family	Tipp/Limerick
5	Intolerant	F	C1C2	35- 50 No kids	Clare/Galway
6	Coeliac	F	BC1	Young Family	Tipp/Limerick
7	Coeliac	M	C1C2	Young Family	Dublin
8	Coeliac	F	C2D	Older Family	Clare/Galway
9	Intolerant	F	BC1	Empty Nester	Dublin
10	Coeliac	F	BC1	Empty Nester	Dublin

***Young Family =** someone who has children under the age of 12 years old, **Older Family=** someone who has children aged 13 or over

Fieldwork took place 25th January – 3rd February 2017

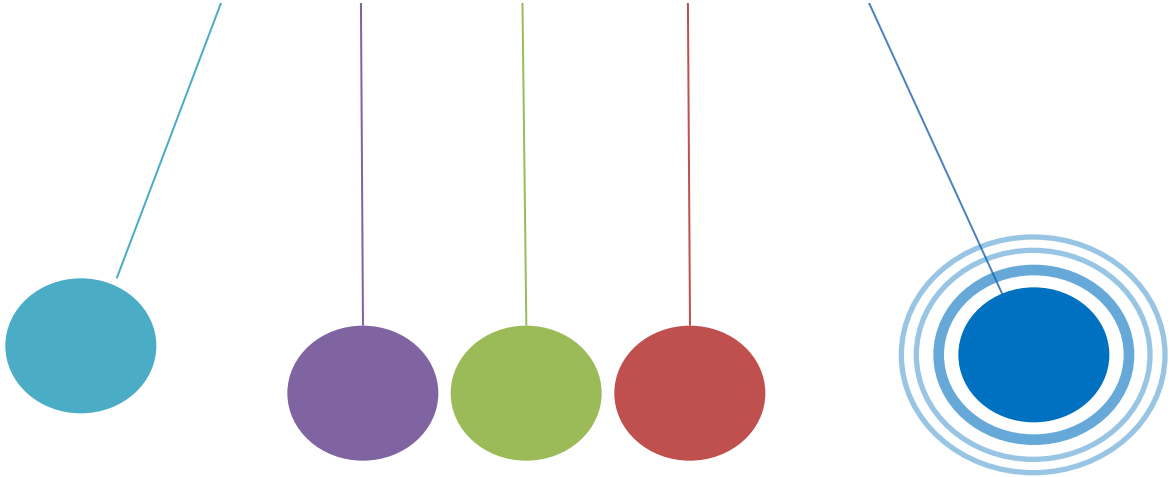
The Purchasers – Who we spoke to

Int	Type of Purchaser	Gender	Soc	Profile*	Area
11	Wheat allergy	F	BC1	Young Family	Tipp/Limerick
12	Coeliac	F	BC1	Young Family	Clare/Galway
13	Coeliac	M	CIC2	Older Family	Clare/Galway
14	Lifestyle	F	C2D	Older Family	Dublin
15	Intolerant	F	C1C2	Empty Nester	Tipp/Limerick

***Young Family =** someone who has children under the age of 12 years old, **Older Family=** someone who has children aged 13 or over

Fieldwork took place 25th January – 3rd February 2017

Nationally Representative Online Survey



OmniBoost is a flexible omnibus allowing for key target groups to be targeted in addition to a nat rep sample of 700

A boost of Gluten Free shoppers was added to those naturally found in a Nat Rep sample

Total Gluten Free Purchasing Sample n=172

Respondents were asked a range of questions related to purchasing Gluten Free

Total interviews n=777. Interviews carried out between 23rd February and 1st March 2017



Key Trends

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Labeling laws are tightening around the world

Canada All foods certified Gluten Free by Health Canada must contain under 20 parts per million of gluten. Tax reductions available [1]

In the **US** in 2014 new laws re labelling of Gluten Free by the FDA [2]. Gluten Free Watchdog set up since FDA did not require testing for cross contamination – consumers taking cross-contamination into their own hands [3]

Argentina's "National Program for the Detection and Control of Celiac Disease." set labelling restrictions and created a national logo for all certified-Gluten Free packaged foods [4]



European Union - adopted universal labelling laws for Gluten Free food, any of the 14 allergens that are on the regulatory list are to be emphasized on the label of a pre-packaged food if they are used in ingredients etc. [5] Italy hailed as particularly advanced.

Australia and New Zealand – laws set by the Australia New Zealand Food Standard's Code require 1) Foods labelled as "Gluten Free" must not contain any detectable gluten/malt, 2) Ingredients derived from gluten containing grains must be declared on the food label, 3) "low gluten" must contain less than 200 parts per million of gluten [6]

There is less thirst for Gluten Free products in non-Western countries

Deep Dive into the UK – there is a lot to learn from an Irish perspective

- 2011-2015 accelerated growth in Free From to 16% in 2016 - while Gluten Free set to grow at lesser rate lactose-free set to enjoy more strong growth [7]
- 80% of shoppers buy Free From in supermarkets, some mainstream brands traditionally Gluten Free are labelling them as Gluten Free although not modified, this is seen for example in categories such as juice drinks and carbonated soft drinks leveraging their gluten- and dairy-free credentials [8]
- Rise in adspend – the market saw a 50% growth in above-the-line, online display and direct mail adspend in 2015, to a four-year high of over £9 million. [9] The top four spenders took 97% of the identified total, with dairyfree and dairy alternatives dominating [10]
- The Coeliac Association has a food checker app which scans bar codes
- The British Dietetic Association – has campaigned to say that being famous doesn't make you an expert



Setting the Gluten Free Market context in ROI

- Previous figures revealed that 8% of Irish households purchase Free From products on a weekly basis [11]
- The incidence of Coeliac disease in Ireland is estimated at approximately 1% of the population, many as yet undiagnosed [12]
- Gluten Free is estimated to be worth €29million in Ireland in 2015 and experiencing year on year growth [13]

ROI Google Gluten Free 2016 Related query	Rising
Coeliac	+70%
Gluten Free	+60%
Gluten Intolerance	+60%

Related Google Breakout topics 2016

Cider

Paleolithic

Oatmeal

A higher value means a higher proportion of all queries, not a higher absolute query count

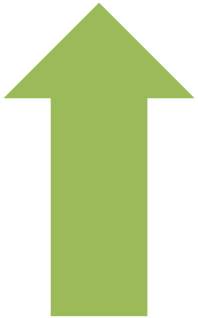
Location	Gluten Index
Cork	100
Lucan	88
Galway	80
Dublin	75
Limerick	66

Results marked "Breakout" had a tremendous increase - probably because these topics are new or few prior searches

Source: Google Trends (20/01/12 – 19/01/17)

The google data is in line with the Nielsen (2015) report that Dublin and Munster overtrade in Free From sales [14]

In ROI retailers are widening their Gluten Free offering thus catering for all Gluten Free shoppers



The private market is providing products for all Gluten Free shoppers

- Traditionally pharmacies or health food stores were the main channels – they still remain but are now in fiercer competition with retailers
- Many independent suppliers have set up e.g. in local markets/ through the SuperValu Food Academy
- Now all 5 supermarket retailers have a Gluten Free Offering. Feedback prior to the research was that Tesco was perceived as having the best Free From options in ROI and Supervalu more varied by store (Nielsen 2015)
- The Top 9 products mentioned by Lovin Dublin are 9) Hanna's Secret, 8) Bfree Bread, 7) The Foods of Athenry, 6) Dr Coy's 5) Pure Food, 4) Aldi's 'Has No' Range, 3) The Gluten Free Foodie, 2) Goodness Grains & 1) Sowan's Gluten Free Mixes [15]



Public/voluntary support focuses only on those with Coeliac Disease

- In the past Gluten Free products for those with diagnosed Coeliac disease were reimbursed - Now these have been phased out but tax reliefs are still made through revenue.ie
- The Coeliac Society Ireland compiles and updates a Coeliac List – it specifically caters for those with Coeliac disease
- HSE has a Coeliac section on the website Gluten Intolerance is routed to that section

The content of what Bloggers and celebrities say provides a picture of their core concerns

Global celebritities: Gwyneth Paltrow, Novak Djokovic, Miley Cyrus, Russell Crowe, Rachel Weisz, Bill Clinton

Bloggers: e.g glutendude.com, theglutenfreeblogger.com, glutenfreegirl.com, glutenfreemom.com

Social Media: Pinterest (e.g.The Gluten Free Shopping List "Yum, Run"), Instagram (#glutenfree), You Tube, Facebook pages

Celebrity Chefs/ nutritionists e.g. Gearoid Lynch Chef



Defending Gluten Free - arguments are heavily scrutinised (also by peers e.g. Paltrow v Gluten Dude) - some taking advocate role

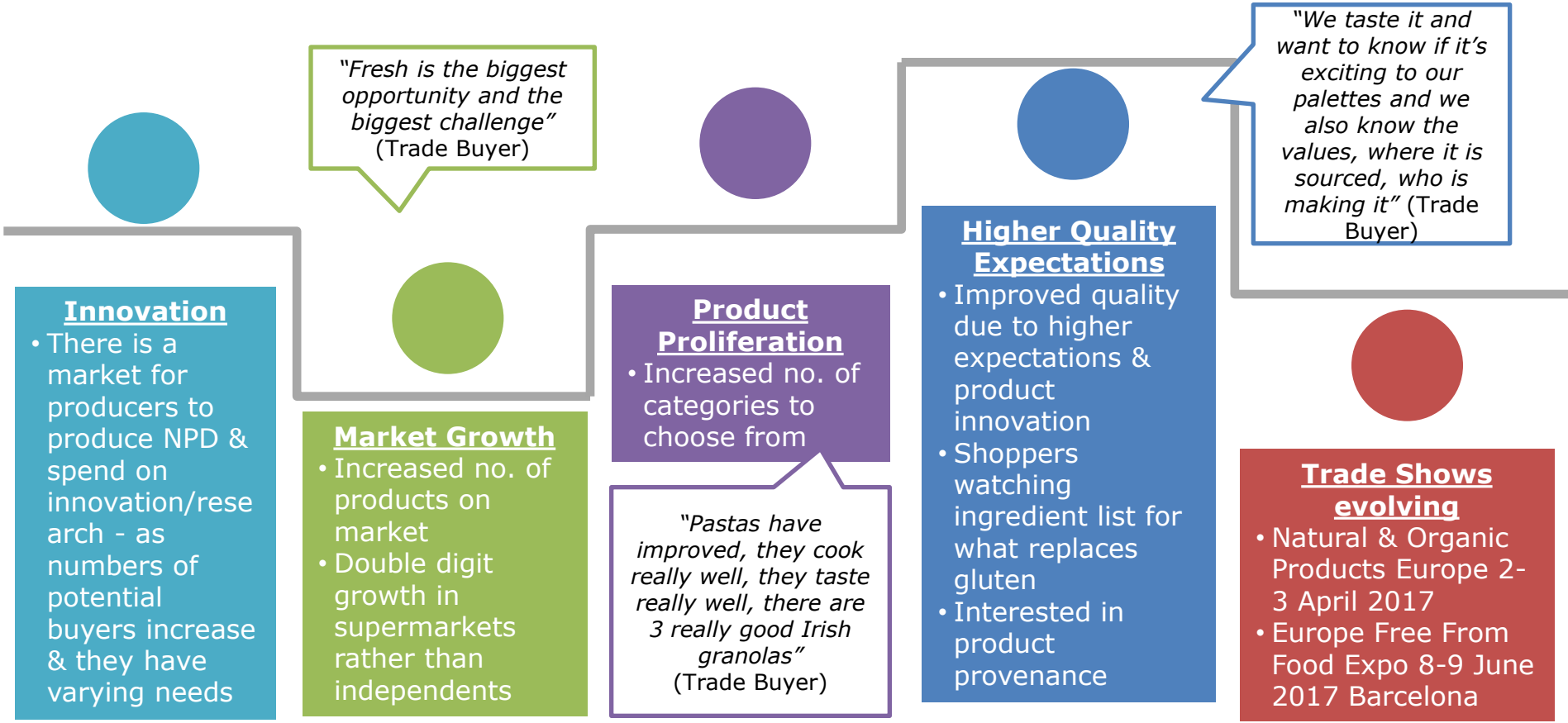
Recipes sources and product endorsements the mainstay

Emerging trend-travel advice for Gluten Free – Ireland seen as a good destination for Gluten Free

Healthy lifestyles & a trend towards Wholefoods threaded through (but critiqued too)

While Gluten Free is not seen as a fad, backlash is common and it is important to keep an eye on these channels

Influencer perspectives: Trade buyer and blogger say Gluten Free market becoming mainstream



Influencer Perspectives: Gastroenterologist & Dietician note 2 main routes for testing



Blood Tests (serology)	Biopsy	IGE Test for Wheat Allergy	Kinesiologist Iridologist	Pharmacy test (IgG)	Hair/Vega testing

Recognised by medical profession and lead to a Coeliac or Wheat Allergy Diagnosis

DO RECEIVE MEDICAL SUPPORT/ONGOING DIETICIAN

Not recognised by medical profession but some may do these tests and cut gluten completely from their diet

DO NOT RECEIVE ONGOING SUPPORT/DIETICIAN

IBS is medically recognised but there is little treatment and support given

However, if someone cuts gluten from their diet before the medical test this may affect the results

Influencer perspectives: Kinesiologist reveals many curating own health when no medial solution

Last resort – When a medical route does not answer concerns, many are self-diagnosing through tests – finds that many clients have IBS symptoms, and given very little dietary advice

Testing process- 3 steps: 1) Take case history, 2) Carry out muscle tests for different enzymes including gluten, 3) Give Advice (e.g. diet and supplements

Follow up– Generally do not follow up. If suspects Coeliac Disease refers to medics



Influencer perspectives: the Medics are somewhat concerned about long-term consequences

In the short-term there is a proliferation of nutritional advice/testing

- The term 'nutritionist' isn't protected so some scepticism of the qualifications of many labelled as nutrionists
- Evidence to indicate that the IgG tests are not correct
- The Coeliac iceberg theory – suggests wider Coeliac disease is latent and asymptomatic – hard to diagnose as can be later in life and problematic if already cut out gluten



Long-term effects of following Gluten Free without support

- If eliminating gluten but not re-introducing – cannot be sure gluten was the problem
- If dietary advice not sought risk for deficiencies in other nutrients could lead to problems in long-term
  - For example, those on a Coeliac diet are at risk of osteoporosis so need to ensure they replace calcium and undergo Dexa scans
  - Another example is that people may consume less fibre – especially an issue for kids



Deep Dive into the Gluten Free Shopper

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Who is buying Gluten Free? Consumers and Purchasers



Of the Nationally Representative Sample claim to buy Gluten Free products

Gluten Free Purchasers – who are they?

Male	47%
Female	53%

Capital City	18%
Large City	36%
Small town	17%
Rural	30%

Dublin	30%
Rest of Leinster	14%
Munster	44% (v 27% nat rep)
Ulster/Conn	12%

Pre Family	32% (v 20% nat rep)
Young Family	17%
Middle Family	9%
Older Family	29%
Empty Nesters	8%
Older no kids	5%

ABC1	62% (v 44% nat rep)
C2DEF	38%

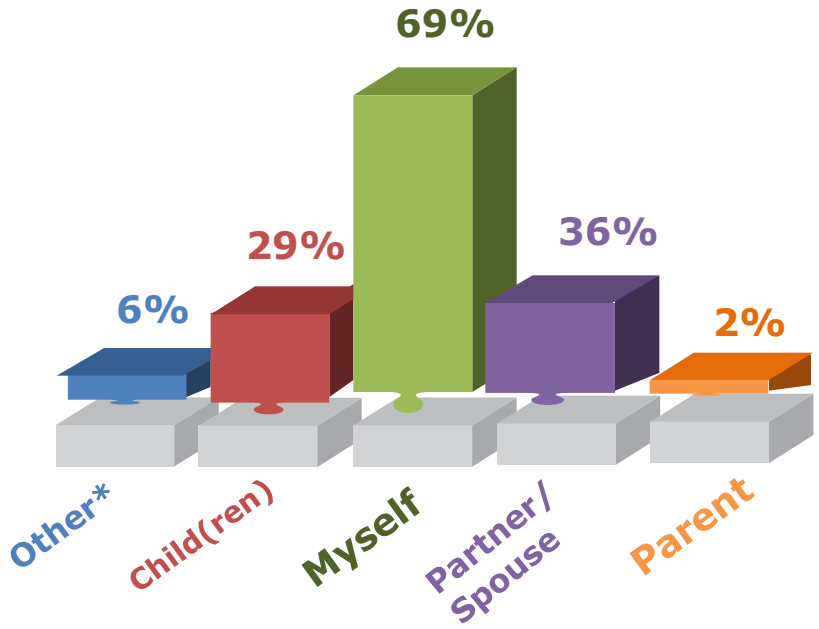
n=172 (Gluten Free shoppers)

Demographics Questions located in appendix

Significant skews in Gluten Free purchasing towards ABC1, Munster and pre-family

Who are they buying for?

GF2. When you say you buy Gluten Free products, who is this for? (Multiple choice)



*grandchildren, in-laws, friends

Base: n=172 (Gluten Free shoppers)

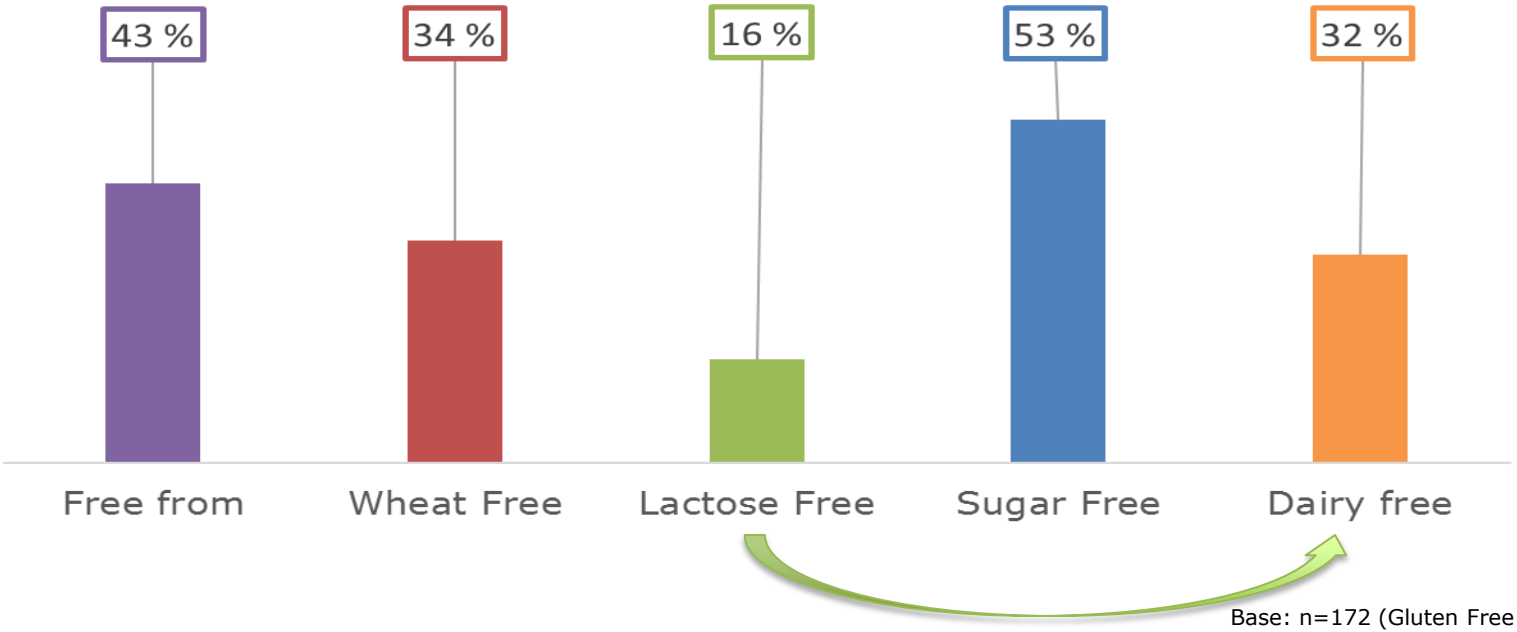
1 in 3

Gluten Free shoppers are purchasers only. I.E. they are buying for other family members and don't eat Gluten Free themselves

About 2 in 3 Gluten Free shoppers are also consuming themselves, but over a third are purchasers only

There are overlaps/pairings between those buying Gluten Free and other Free From categories

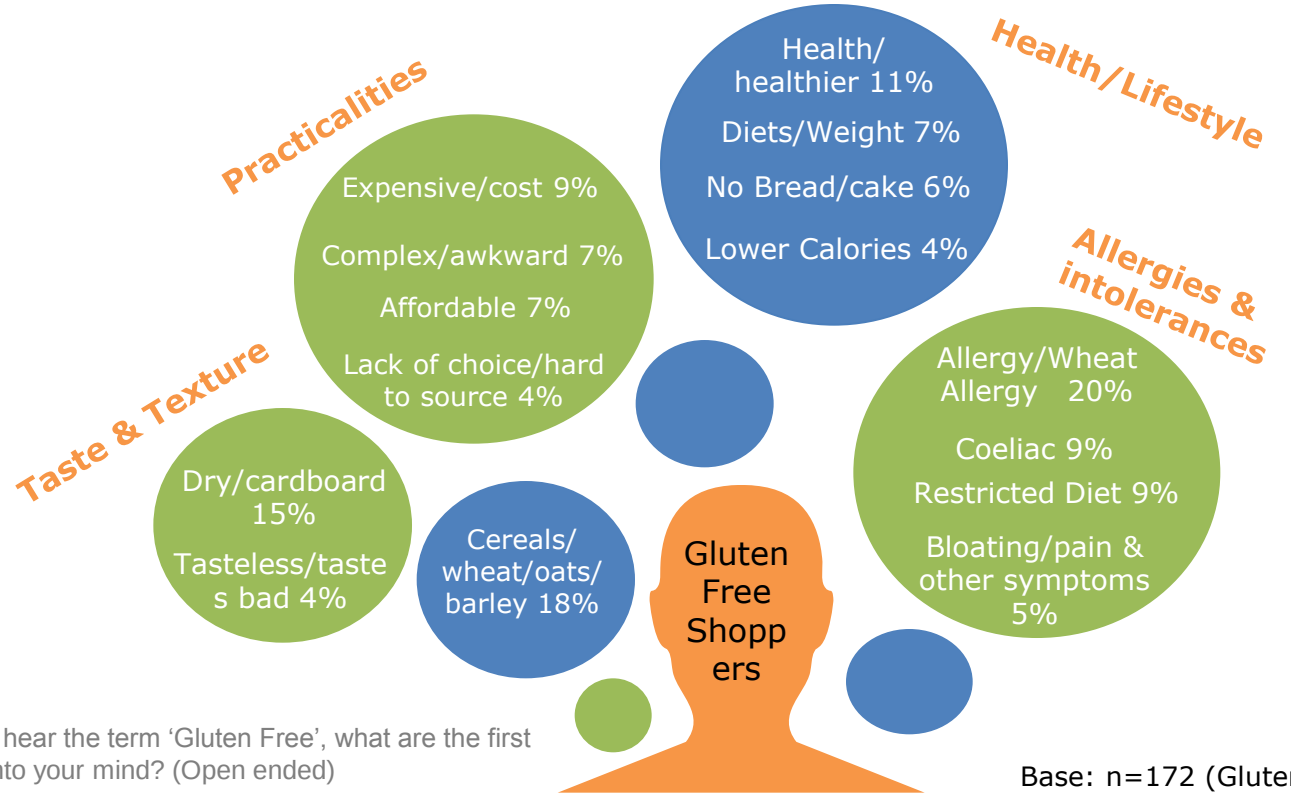
S9. Which of these types of food do you regularly buy? (Multiple choice)



Base: n=172 (Gluten Free shoppers)

Overlap with lactose or dairy free could partly be explained by toning down dairy while on a Gluten Free diet e.g. for those Coeliac disease to repair any villa damage

Shopper Associations with Gluten Free: Gluten Free Shoppers

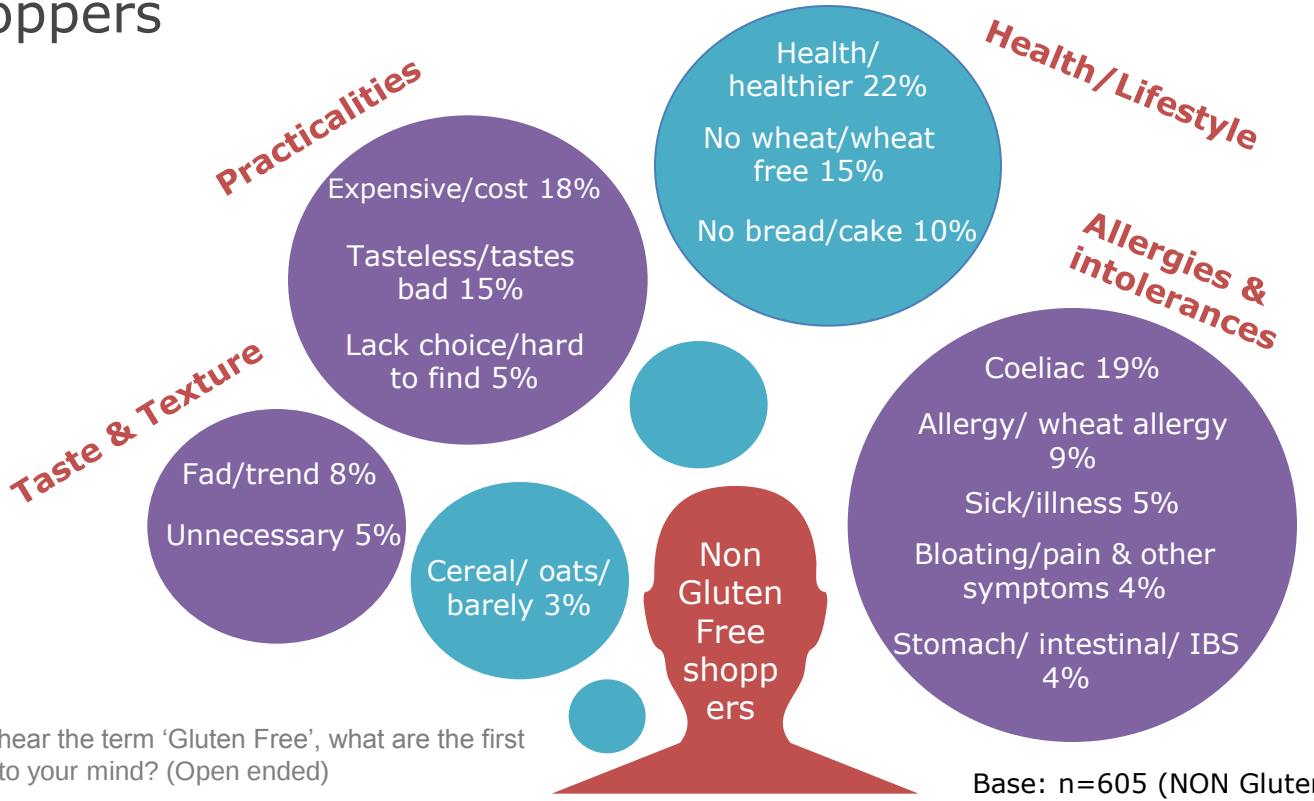


GF5. When you hear the term 'Gluten Free', what are the first things that pop into your mind? (Open ended)

Base: n=172 (Gluten Free shoppers)

Top spontaneous words associated by Gluten Free shoppers are allergies at 20%, a combination of cereals at 18% and dry texture at 15%

Shopper Associations with Gluten Free: Non Gluten Free Shoppers



GF5. When you hear the term 'Gluten Free', what are the first things that pop into your mind? (Open ended)

Base: n=605 (NON Gluten Free shoppers)

Non Gluten Free shoppers associating 'expensive/cost' with Gluten Free. Less people mentioning wheat allergies, focus on Coeliac. Here we see some cynicism with 'fad/trend' and 'unnecessary'

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Introducing 3 Gluten Free profiles

3 main typologies/profiles emerged: symptoms determine why avoiding gluten

GF3. And for [relevant person from GF2], please indicate the main reason they eat Gluten Free products

Base: n=172 (Gluten Free shoppers)

"Let food be thy medicine" (Hippocrates)

38%

1. Lifestyle

Not motivated by symptoms as much but more by the perceived benefits of avoiding gluten

No/mild symptoms

Please see Appendix for question GF3

GF3. Answered Code 5

40%

2. Gluten Intolerant / sensitive to gluten

Experience symptoms when eat gluten – some have been tested medically/non-medically, others not

Moderate symptoms

GF3. Answered Code 3&4

22%

3. Coeliac/Wheat/Non Coeliac Gluten Allergy

Have to avoid gluten as will have severe symptoms (varies person to person)

Severe symptoms

GF3. Answered Code 1&2

Across the situational analysis and qualitative work there is a clear link to the use of food to meet a health need

Nationally, 4% report a Wheat Allergy/Coeliac disease that necessitates choosing Gluten Free

S9. Which of these types of food do you regularly buy? (Multiple choice) Base: n =700 nat rep

GF3. And for [relevant person from GF2], please indicate the main reason they eat Gluten Free products. Base: n=172 (Gluten Free shoppers inc boost sample)



The claimed increases in Gluten Free purchasing are driven to a large degree by lifestyle rather than medical necessity

Their outlooks on cooking/food/health can determine how someone avoids Gluten in their life

Laid back 14%



Eats many of the Gluten Free product categories. Primarily reads label to identify gluten, not much else – convenience is key

Food is more functional for them – a means to an end/fuel

Practical 60%



Buys a mix of naturally Gluten Free products but also from several Gluten Free categories

They are pragmatic about food - mix of cooking/baking from scratch & pre-prepared food as time poor

Careful 26%

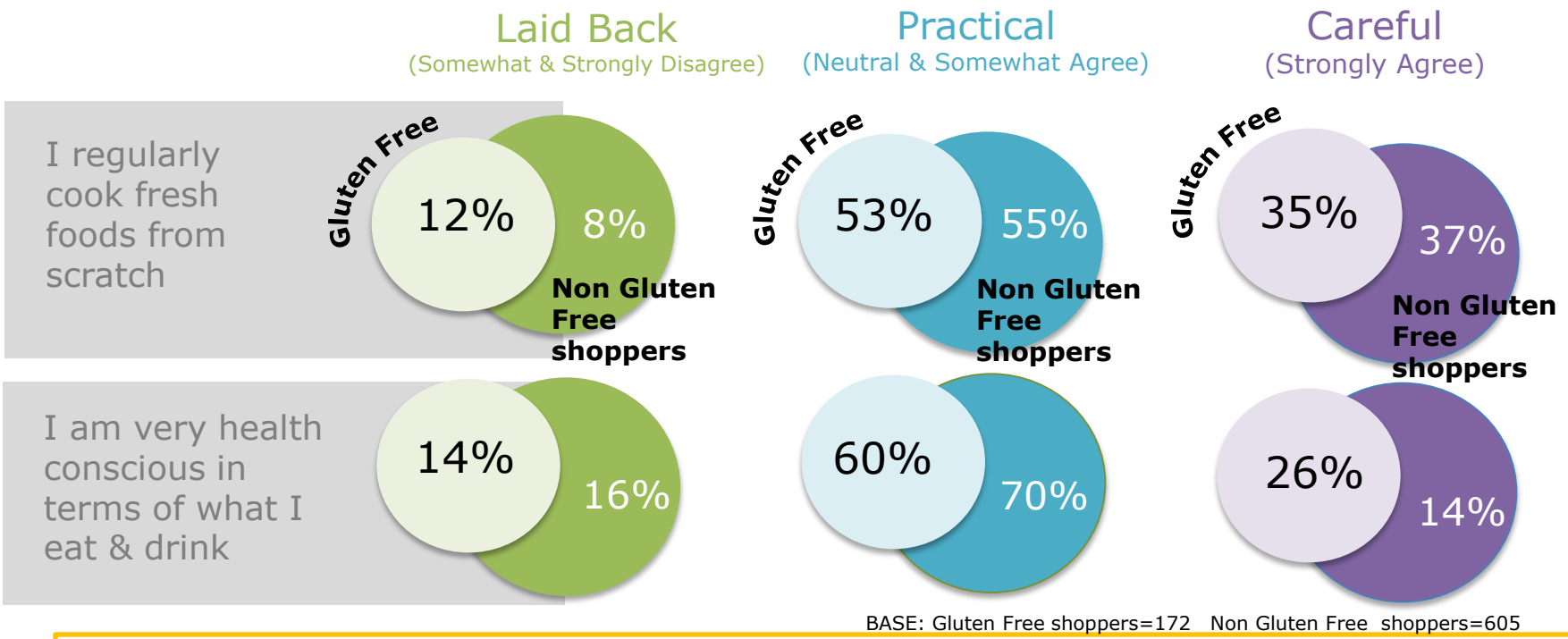


Buys less product categories, prefers naturally Gluten Free ingredients & less processed food but if a treat, it needs to be premium

Food is their passion – cooks/bakes from scratch & wants natural ingredients, low in fat/sugar, influenced by trends e.g., wholefoods

More Gluten Free shoppers consider themselves to be very health conscious in terms of what they eat & drink

SP2. To what extent do you agree or disagree with each of the following statements?

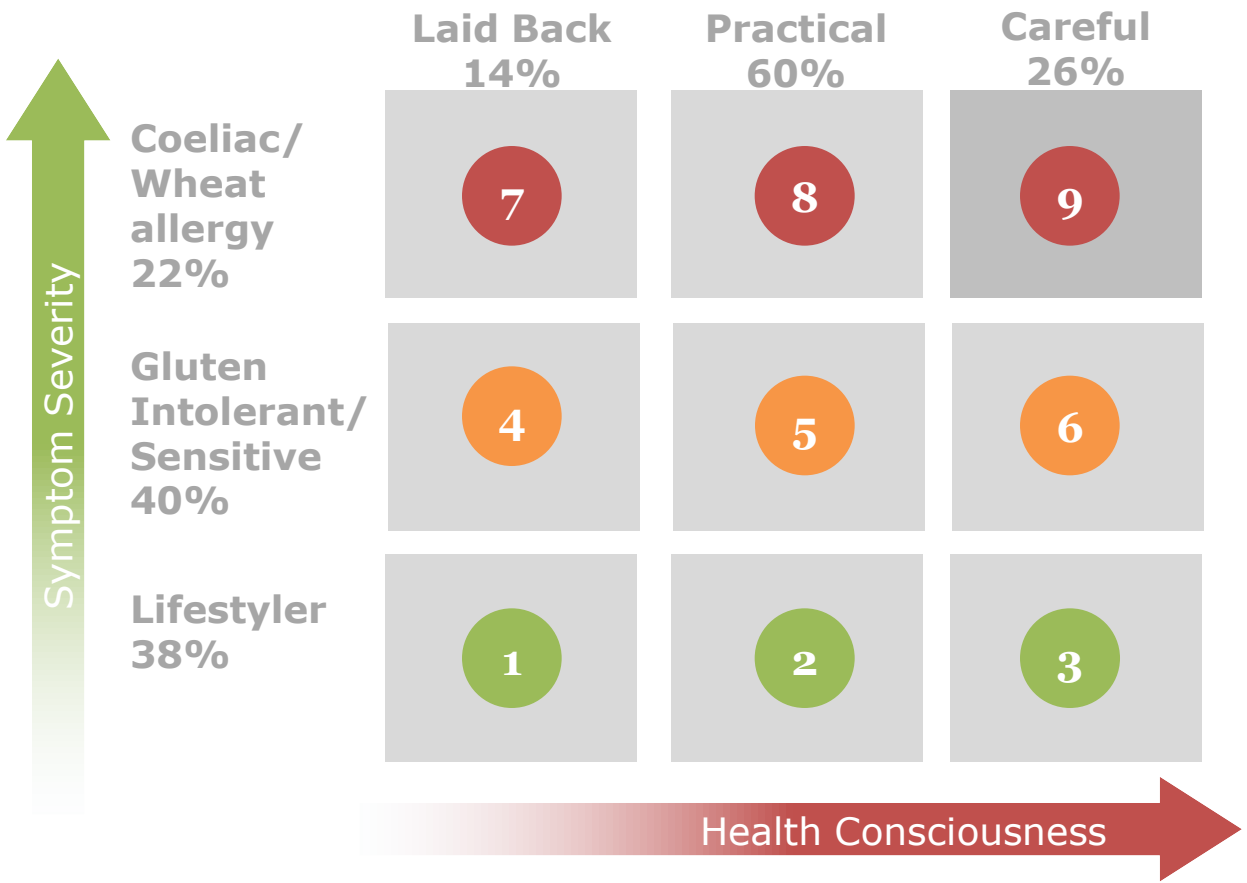


BASE: Gluten Free shoppers=172 Non Gluten Free shoppers=605

1 in 4 Gluten Free shoppers strongly agreeing they are conscious in terms of what they eat & drink, significantly more than non-Gluten Free shoppers

The 3 types and nuances are outlined here

We've developed a storybook of each of their journeys – in their own words – to delve into their experiences



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The Lifestyler Experience (38%)

The Lifestyler journey: Why Gluten Free?

1

Some symptoms may be mentioned e.g. bloating/low energy but behaviours driven more by perceptions than physical symptoms (or as gastroenterologist suggests from carb intolerance)

Often it can be a gradual process of reducing Gluten Free

2

Key perceptions that gluten is bad for you, eating Gluten Free has health or weight loss benefits, some have heard others talk about benefits

3

Less likely to have been to the doctor or carried out any tests – some may have been tested by a kinesiologist/pharmacist test

"I think we will go full circle in the next 5 years – back to potatoes and veg and meat, to naturally healthy foods" (Woman 35-44, Tipperary/Limerick)

"I wasn't tested but the feeling and wellbeing sense proves it works" (Woman, 25-34, Dublin)

4

Simply switched to an avoidance diet without any reintroduction

Most flexible of the groups because do not 'have' to avoid gluten but 'choose' to

How lifestylers do Gluten Free

- Many hear about the lifestyle or the products through friends or family but for some it's via social media or favourite bloggers promoting it as a healthier way of life
- Simple trials or elimination diets test it out and if any existing symptoms are quenched or the general feeling of wellbeing is improved then they are bought into the concept



Laid back

- Dipping their toes into Gluten Free arena - happy to eat across the wide range of categories
- Many feel eating Gluten Free helps with weight management although not scrutinising the nutritional information too closely



Practical

- Happy to try out Gluten Free products- see the benefits when they follow the diet
- Occasionally eat gluten but try to have more convenient Gluten Free products in cupboard/freezer to prevent that
- Can be confident cooks but not obsessive about health - believes there is a balance



Careful

- Most likely to follow a wholefoods approach to their diet
- Tend to eat more "naturally" Gluten Free products/ meals than use products- but not totally adverse to Gluten Free products
- Check the nutritional values of a product closely
- Treats are rare but in moderation and often baked or made themselves in order to manage ingredients
- A product with an ingredient list of 5+ items or unrecognisable names is deemed as less healthy for these

Lifestylers are the least likely to affected by eating gluten but are a large portion of Gluten Free shoppers

What happens for lifestylers in & out of home

In Home



Mealtimes:

- Pre family tend to eat differently than others in household
- Family – tend to eat the same dinners when possible (e.g. pasta)
- Batch cooking for the week ahead

Out of Home



- Visiting Family/Friends:
  - Likely not to say anything for fear of putting host out/others don't know Gluten Free
  - Will bring own food to other homes but only if host knows they eat Gluten Free – or attitude 'this time won't hurt'
- Eating Out/On the Go
  - Hardest is eating 'on the go' as very little choice
  - Tend to know best places at Gluten Free or seek out before
- Holidays/Travel
  - Not a barrier but choosing country/ hotel. Those with careful mindsets may research Gluten Free availability to reassure of options
  - Will try to manage within the menu as best they can but will ask for Gluten Free options where possible
  - Twitter and Instagram key sources

This cohort feel Gluten Free options are becoming more commonplace in restaurants making it easier to eat out

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The Gluten Intolerant/Sensitive Experience (40%)

The Gluten Intolerant/Sensitive journey: Why Gluten Free?

1

Symptoms include varying gastro intestinal reactions – bloating, diarrheoa etc. – some difficult stories about knowing where public toilets are and some giving up work

"The first thing I look for in a restaurant is a toilet, not the menu" (Man, 35-44, Dublin)

2

Many have tried and failed to get a medical diagnosis, may get IBS diagnosis/ulcers or some mention of Non Coeliac Gluten Sensitivity. Seek alternatives e.g. kinesiologist, pharmacy tests, may have undergone dietician controlled elimination/re-introduction diet or simply avoidance

3

Disenfranchised illness as not always formal diagnosis but experience unpleasant reaction to eating gluten & what's worse, the diet doesn't always fix things

"'IBS is not a sexy diagnosis' and they have impression it can't be cured" (Gastro-enterolgist)

4

Relatively unknown Low Fodmap diet hailed by dietician as potential alternative

What happens as a result of going Gluten Free affects their narrative – not happy ending for all

This group is the most frustrated of the 3 as they don't have a medically recognised diagnosis but feel something is wrong

How Gluten Intolerant/Sensitive do Gluten Free

- For many it is a route of last resort after having tried many other avenues to alleviate their symptoms – often try complementary and alternative routes to determining the cause of symptoms



Laid back

- Buying many of the product categories
- Food plays a functional role, a type of fuel to get you through day



Practical

- Happy to try out Gluten Free products and are seeing the benefits when they follow the diet
- See it as a 'diet' and hard to follow 100% but find it hard when 'fall off the wagon' as symptoms recur



Careful

- They are the ones checking for the nutritional values and living a very focused and healthy life
- Treats are generally off the menu so they are reaching for the healthy cooking ingredients and baking ingredients
- Very on top of things
- Positive narrative - something was wrong and now I have proof (test results) so I should get more recognition - From confusion to…finding a path ahead – control
- But also negative narrative - something was wrong and something is still not right *"My husband eats healthy but still looks pregnant"* (Woman, 55-64, Tipperary/Limerick)
- A lot of work in the beginning (reading up, looking at ingredients) but less so as time goes on

In order to see results it takes work and even if they do work hard not all rewarded with lessening symptoms

What happens for Gluten Intolerant/Sensitive in & out of home

In Home

- Mealtimes:
  - Frequently the whole household switches to cooking Gluten Free for mealtimes
  - In some cases they have 2 sets of equipment to avoid cross contamination; 2 toasters, separate pots/colanders

Out of Home

- Visiting Family/Friends:
  - While fear putting host to bother- this cohort need to highlight condition in order to avoid symptoms
  - May bring their own food to other's homes in effort to avoid drawing too much attention
- Eating Out/On the Go
  - Find eating on the go hardest - often need to prep/ carry own food
  - Frequently observe where toilet facilities are placed
  - May ring ahead to restaurants to ensure menu options are Gluten Free but tend to stick to a repertoire of preferred restaurants
- Holidays/Travel
  - Some research done in advance to ensure they are catered for as travel means less prepared

The varying unpleasant uncontrollable reactions to eating gluten for this cohort makes them think carefully about eating OOH

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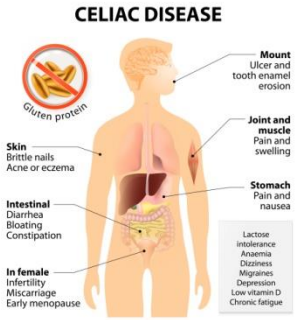
The Coeliac and Wheat Allergy Experience (22%)

The Coeliac journey: Why Gluten Free?

1

Gastro Intestinal & wide-ranging symptoms – very intense experience



3

Upon diagnosis join Coeliac Society and heavily look for information. The more Careful will move to scratch cooking if not already and most will avoid alcohol

9% of Gluten Free Shoppers

2

Diagnosis made after GP visits then blood test and gastroenterologist/other specialist, elimination diet and reintroduction – some persistence to get diagnosis but relief after as real condition

"At least I know I have something, I was thinking all sorts" (Woman, 65+, Dublin)

4

Used to get reimbursed. Over the years – have moved from pharmacy to mainstream shops & supermarkets – delighted now at cheaper prices and more availability: *"Crisps used to be off the menu"* (Woman, 25-34, Tipperary/Limerick)

Those with Coeliac disease have a medical diagnosis which is now widely recognised & they get support

In this category there are also those with a Wheat Allergy – their journey: Why Gluten Free?

1. Symptoms include intense rejection of gluten e.g. vomiting (the body rejects the gluten)
2. Diagnosis made after GP visits then IgE tests with gastroenterologist
3. Big issues when with other people so very prepared with products in bag and potential medication. Especially hard for younger kids at parties/eating out – limited to potatoes – when travelling take somewhere with cooking facilities

"For birthdays she has her little bag with Zirtek and Anapen and her kit in class…parents are nervous so I ring and have a chat and send a pre-cooked dinner" (Woman, 35-44, Tipperary/Limerick)

4. Referral is made to Dietitian for elimination/ avoidance diet

13% of Gluten Free Shoppers

Those with such allergies can be extremely restricted but they have also a recognised medical condition

How Coeliac/Wheat Allergy do Gluten Free

- Probably the most proficient group at reading labels & assessing if products suitable
- Also very likely to get their children tested –feeling responsible for passing a disease on
- Worry about the long term effects of their disease and of all groups are most likely to have some access/monitoring to/by a medical professional over the years



Laid back

- Know they have to follow diet but generally don't give it much thought; maybe at the start but now it's just an inconvenience
- Delighted with the product choice now and don't have to do as much work scratch cooking
- Buy into quite a few categories & products especially treats



Practical

- Quite pragmatic about it and do what they can, sometimes they pay the price (physically) of not being as compliant
- Often wish it was easier especially on the go
- Buy several types of Gluten Free products including cereals and bread to make life a little simpler but may make their own sauces



Careful

- Tend to eat more "naturally" Gluten Free products/ meals than use products- but not totally adverse to Gluten Free products
- Treats are rare but in moderation and often baked or made themselves in order to manage ingredients or any contamination and if bought seeking premium
- A lot of work in the beginning (reading up, looking at ingredients) and contact with the Coeliac Society but less so as time goes on
- Visits dietician when required; feels doesn't need as in control it but always goes

Implication of gluten in the diet is most severe for this group & regular medical interaction (dietician/consultants) is common

What happens for Coeliac/Wheat Allergy in & out of home

In Home



- Mealtimes:
  - More often than not- whole household largely switches to cooking Gluten Free for mealtimes
  - Families in particular try to cook Gluten Free meals with rice or potatoes rather than with Gluten Free products
  - If not the case 2 sets of equipment to avoid cross contamination; 2 toasters, separate pots/colanders - particularly true when the allergy is the most extreme on the allergy spectrum

Out of Home



- Visiting Family/Friends:
  - Fear putting host out but those who are ill if consume gluten will reveal illness to host -Only the most experienced host make them feel at ease- many question & fret
  - Often bring their own food to others' home
- Eating Out/On the Go
  - Eating on the go hardest - always need to prep/carry own
  - Find very little choice on the go more likely biscuits/cakes
  - Typically they ring ahead to restaurants to ensure menu options are Gluten Free but tend to stick to a repertoire of preferred restaurants
- Holidays/Travel
  - Older tend to use the Coeliac Society travel cards that translate their illness in chosen language to use in restaurants
  - Doesn't hold them back- lots of research done in advance

Visiting family & friends most awkward out of home situations for this type as they feel their illness imposes on people

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Common ground between the 3 groups

Types of information & recipes are typically sourced at diagnosis stage or start of journey

Initial Diagnosis (0-18 months)

-Follow dietician's guidelines strictly

-Many googling for information

-Coeliacs more likely than other typology to get Coeliac Society Booklet & use as a bible (at initial stages)

-Read labels meticulously & shopping takes longer

- Very likely to buy a recipe book(s) and pick up leaflets or search online for inspiration



18 months – Present day

-Get more relaxed about it the longer diagnosed or living that lifestyle

- More relaxed in product choice, cooking & at home but for Coeliacs, those with wheat allergies & those gluten intolerant/sensitive they are still very vigilant out of home to avoid illness/contamination

-**Careful:** tends to create own recipes or easily adapt anything he/she sees to a Gluten Free version. A confident cook & baker so buys limited Gluten Free products preferring to make own. Tends to use cookbooks and Facebook sites for inspiration and possibly follows a couple of bloggers or on twitter

-**Practical:** like to cook occasionally but will also buy the occasional convenience meal, realises can't be 100% good but tries. He/she looks up recipes or social media occasionally but more if in a rut or a special occasion coming up

-**Laidback:** food is fuel so doesn't spend hours resourcing recipes- does however like a good quick tip or shortcut to make cooking easier and Facebook can help by giving suggestions

Facebook used more for recipes, **Twitter & Instagram** can be a great source of information more so for travel or restaurants or product recommendations

Being Gluten Free doesn't always mean searching for recipe inspiration, but your attitude to cooking does

And what do they think gluten is?
Not as simple a question as you'd think

Lifestyler - Laid back

Coeliac/Allergic – Careful

Many are avoiding but don't necessarily know what it is that gluten does and cannot describe it (the why)

But most do know what it is in – the focus is on the foods (the how)

A small number are knowledgeable – especially those with allergic reactions e.g. vomiting – BROW stick factor (Barley, Rye, Oats & Wheat)



Most couldn't articulate what Gluten is but confident on where to find/avoid it; more focus on the how and not the what?

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Understanding the Gluten Free Market

Gluten Free is being bought in many more places than in the past

Health food stores
e.g. Evergreen, Healthwise – only for more specialist items

Tesco
Good range & online is handy with Gluten Free filter. Also clubcard tailors offers to Gluten Free

Supervalu
Again good range but low awareness of Food Academy or smaller companies

Dunnes
Good separation of aisle & yearly overview of all Gluten Free buys helps with tax back

Lidl
Limited but good for pastas etc – same same difference

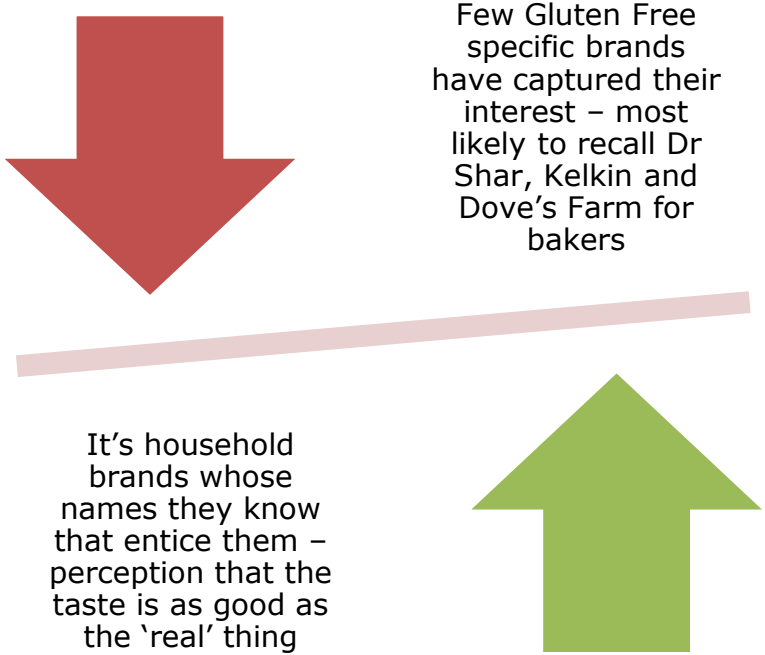
Aldi
Again more limited but handy

Pharmacies
Going less so to these

Butchers
Good for specifics like breaded poultry/ meatballs/ sausage rolls

The plus of the supermarket is that it means they can shop much quicker and get all that they need under one roof

Some staple products being bought but brand names aren't top of mind



Few Gluten Free specific brands have captured their interest – most likely to recall Dr Shar, Kelkin and Dove's Farm for bakers

It's household brands whose names they know that entice them – perception that the taste is as good as the 'real' thing

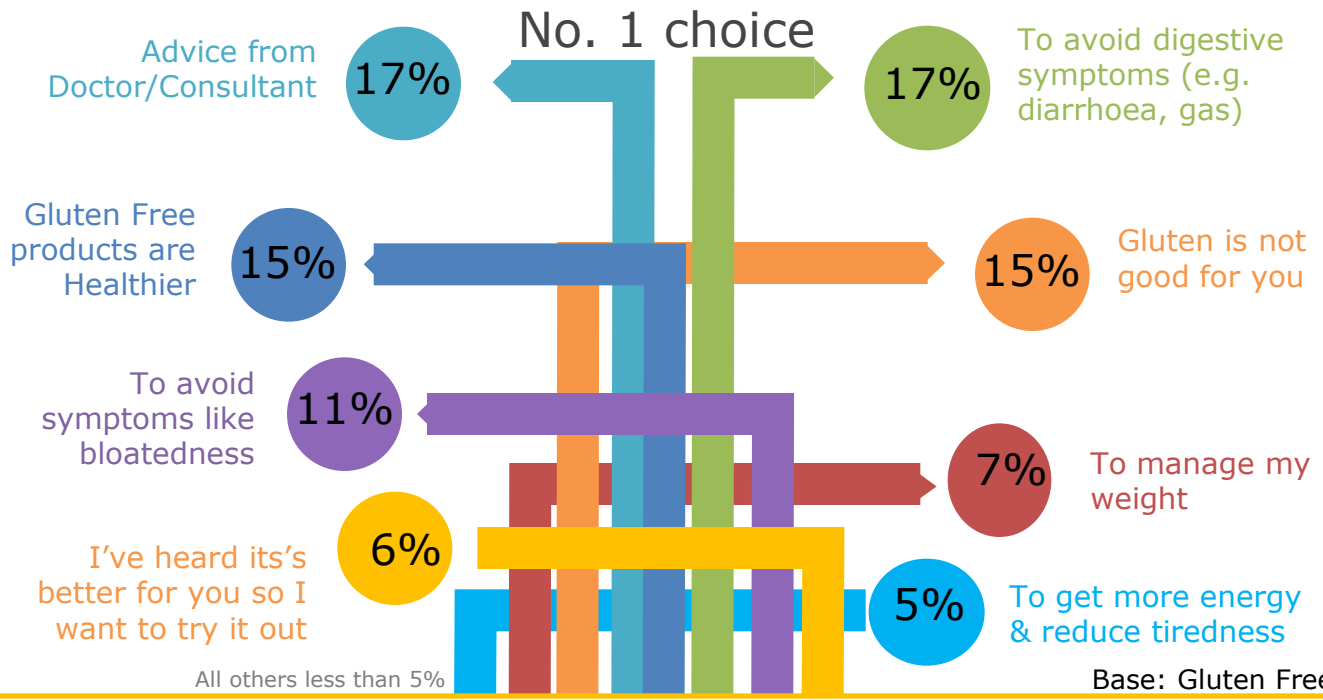
Top cupboard ingredients

- ✓Rice Cakes
- ✓Oats
- ✓Bread
- ✓Pasta
- ✓Crackers
- ✓Pizza
- ✓Biscuits
- ✓Stock cubes
- ✓Cereals
- ✓Flour (in some)

Given the low engagement there is an opportunity for well known Irish brands to diversify into this space

The main reasons for purchasing Gluten Free products

GF6. Which of the following are the main reasons for choosing to buy Gluten Free products? Please rank your top 3 in order from the list below



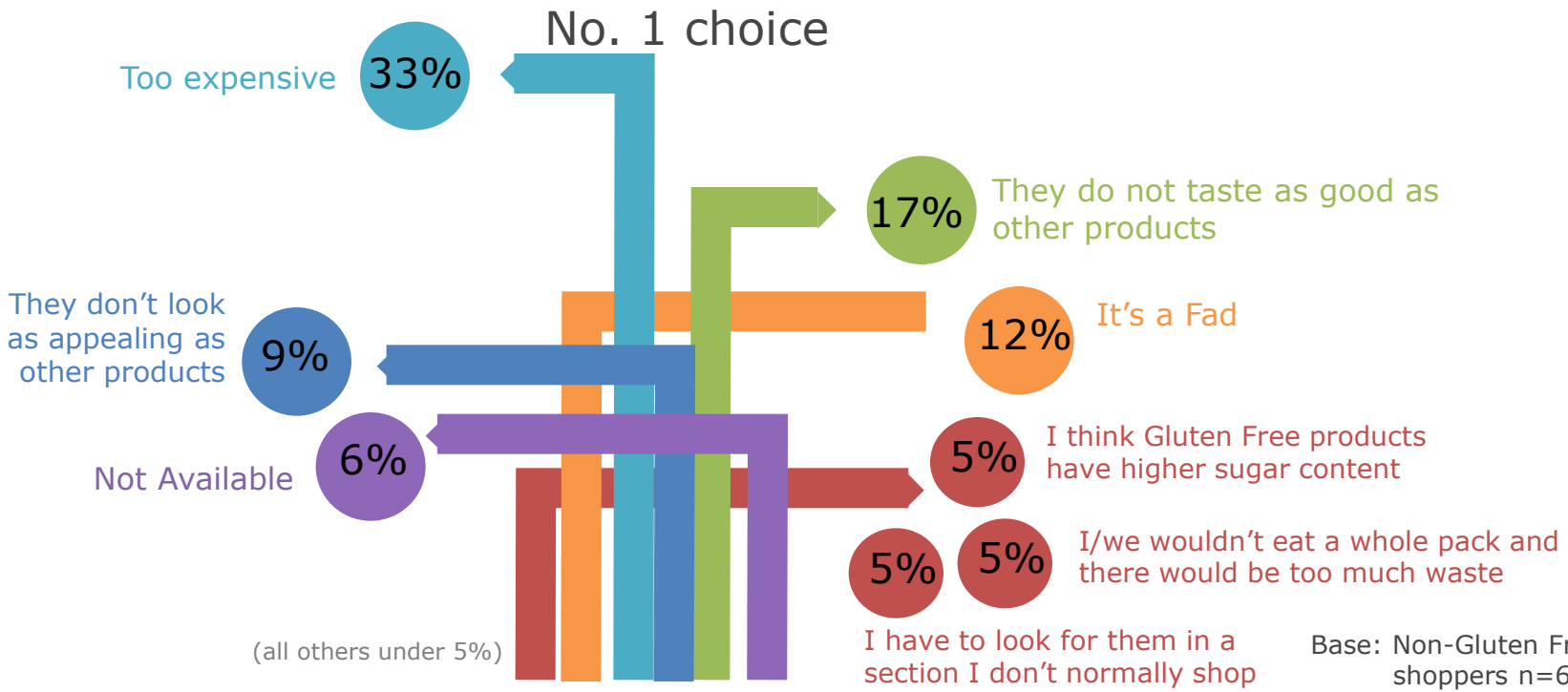
"I was surprised at the range, I don't worry about the price as much – if I haven't had blueberry muffins in years I'm going to buy them" (Female, Young Family, Coeliac, Limerick)

Base: Gluten Free shoppers n=172

Top reasons advice from doctor/consultant & avoiding digestive symptoms. Healthier perceptions also key reasons for purchasing

The main reasons for NOT purchasing Gluten Free products

GF7. Which of the following are the main reasons why you would not choose to buy Gluten Free products?
Please rank your top 3 in order from the list below



Base: Non-Gluten Free shoppers n=605

A third of non-Gluten Free shoppers selected expense as top reason not to buy Gluten Free. Taste also key - top reason for almost 1 in 5

Shopping Gluten Free requires work - some ideas to lessen the load

If it is unclear on the front of pack or placed in the regular aisle it takes more work which means searching on the back

Colour coding allergens would make it easier

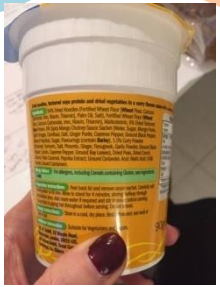
Knorr recently enlarged their Gluten Free wording on the front of gravy pots – now very clear which saves looking at back

EU Legislation has come in to make sure all ingredients noted - while this is good from a natural product perspective, this also adds to the work

Sometimes there are 20 ingredients – lessening the natural perception – 5 appears to be the magic number

"If it is Gluten Free it should say it loud and proud on the front" (Woman, 35-44, Tipperary/Limerick)





Even the Careful Shoppers are happy to lessen their load in the search for Gluten Free

Purchasing Factors

GF8. [In terms of buying Gluten Free products v buying other, non-Gluten Free products]
Please indicate whether you feel it is more important or less important when buying Gluten Free



Irishness did not come through as a key concern, but a nice to have, if all else stacked up

Base: Gluten Free shoppers n=172

Close to 2 in 3 feel that clear information on pack more important on Gluten Free products vs non Gluten Free

Clarity of labelling is a primary concern with packaging & design playing a secondary role in attracting Gluten Free shoppers currently

"The Goodfellas pizza Gluten Free label sticks out like a sore thumb (good thing)" (Woman, 35-44, Tipperary/ Limerick)

"For the treat things the packaging would attract you… they look really decadent and nice so you don't feel like you're losing out" (Woman, 25-44, Tipperary/ Limerick)

- Gluten Free label must be front & back but in a clear & legible manner
- Visibility of the food inside is seen as a bonus & allowing for transparency
- High quality food (ideally finished/cooked) shots- show it's enticing- gives impression as good as non Gluten Free food
- Packaging type should mimic non Gluten Free; make it recognizable
- Expect design to be healthy looking and natural but not clinical as it reduces the "foody" status

Primary

Secondary

If products achieve these points, they help **speed up a shopping trip** that currently takes up too much time while allowing themselves to become part of their regular repertoire!



While packaging can appeal or encourage trial- what's inside & how it delivers on taste ultimately drives re-purchase

What drives repeat purchase?

Repeat Purchase is driven by:

- **Product efficacy;** does it deliver on performance- particularly for ingredients like flour. Doves Farm cited as best performing flour amongst the seasoned bakers we met; others considered too gloopy
- **Taste;** if a product delivers on taste it will be bought again & again. Trial of products is high for Gluten Free shoppers until they find what works for them. A high rate if NPD
- **Brand Design/Recognition;** if the brand delivers on taste & quality & the pack design is recognizable repeat is higher and it becomes part of repertoire

Trial & Error is the order of the day by Gluten Free shoppers until they find what works or tastes well for them



"With flour you really have to experiment" (Woman, 65+, Dublin)

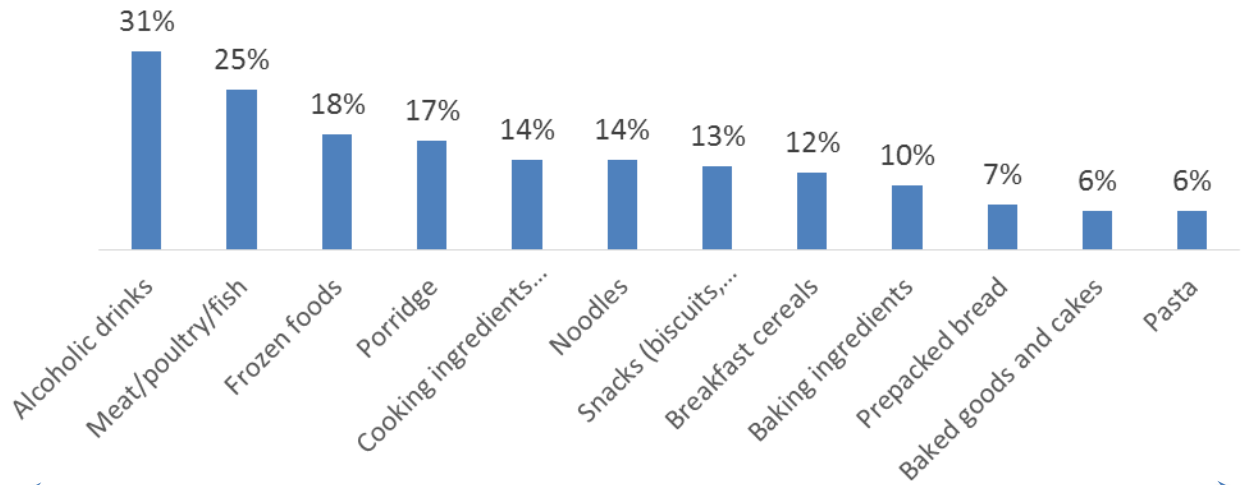
"Sometimes bread tastes like cardboard but we dress it up" (Young girl, 12 years old, Dublin)

Taste is more important than the origin or brand of the product

Gluten Free shoppers are considering Gluten Free products across most categories

GF4. For each of the food types below, please indicate how good or bad you feel the Gluten Free options tend to be. This can be either in supermarkets or when eating out Base: n=172 (Gluten Free shoppers)

"Not a category I consider buying Gluten Free" (Gluten Free shoppers)



Least likely to consider buying Gluten Free

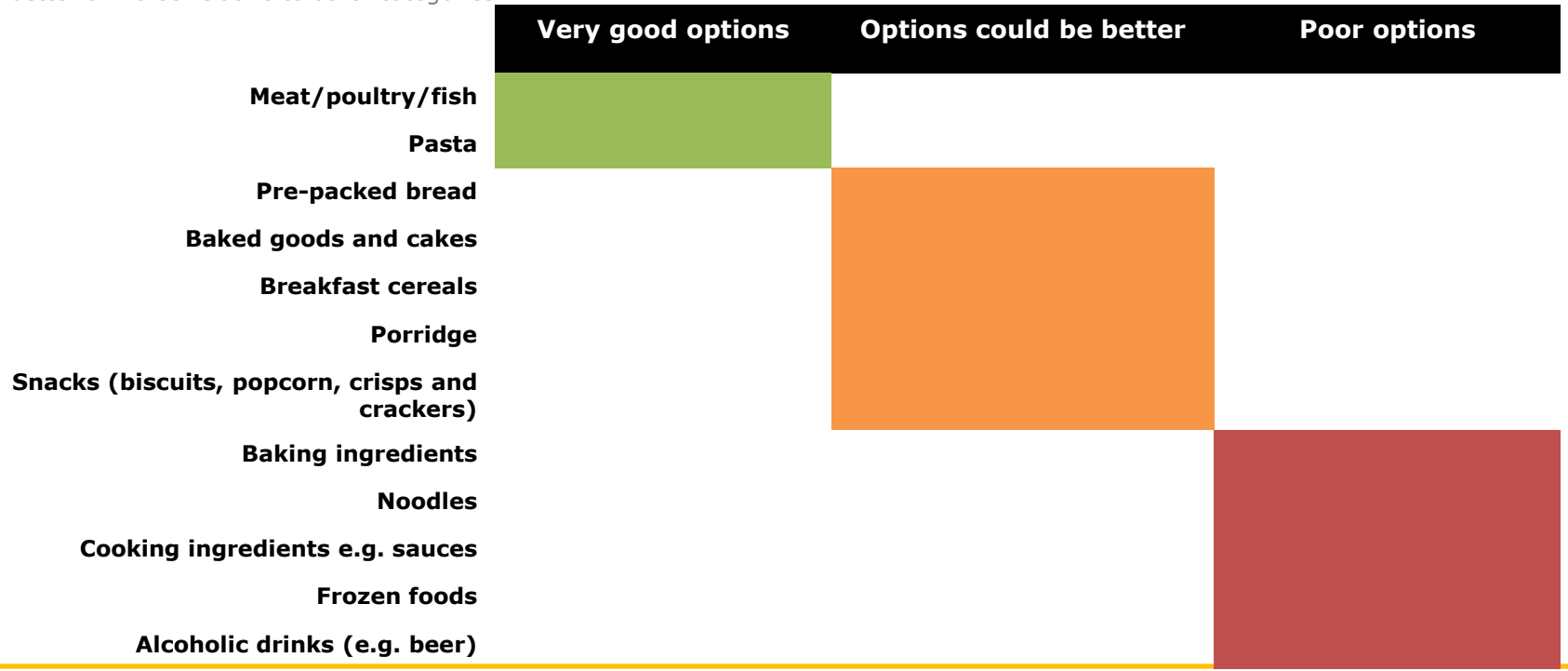
Most likely to consider buying Gluten Free

Alcoholic Drinks and meat/poultry/fish are categories that are thought about <u>least</u> in terms of Gluten Free currently

Traffic-lighting Gluten Free options by category

GF4. For each of the food types below, please indicate how good or bad you feel the Gluten Free options tend to be. This can be either in supermarkets or when eating out. Base: n=172 (Gluten Free shoppers)

Note – this is based on indexing ratings among those who buy in each category to identify the categories where people think options are better or worse relative to other categories



For main meals, pasta scores relatively well on options, but other products (frozen, noodles, sauces) less so

Bread = barometer product – not all knew it about the improvements

With baked bread or baking bread ingredients they still miss the fresh bread experience– many taking to bake their own

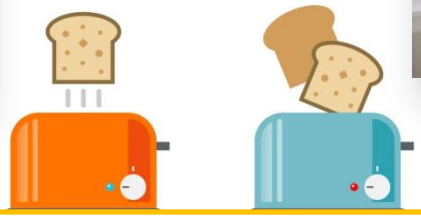
Doves Farm Flour repeatedly mentioned by bakers for its efficacy



GAP

Since bread is often only eaten by one person most is frozen for later use so opportunity to stretch the 'fresh' experience





Where the symptom severity is high, homes tend to have 2 toasters to avoid cross contamination

Bread is one of the most talked about & longed for products so sense that they need to know more about what's available

Green categories: while going well, there is still room for improvement & NPD in meat/poultry/fish

Category	Current perceptions	Future innovation
Meat/ poultry/ fish	Largely see as Gluten Free anyway but some butchers making meatballs and breaded foods which save time and hassle	Gluten Free options for any meat/poultry/fish with gluten/breadcrumbs e.g. crumbed ham, meatballs
Pasta	Has improved over the years and gap between brands closing, still a need to rinse before use to avoid gloop	Focus on brand differentiation

Amber categories: Oats and luxury are big bets – but need to ensure taste is key

Baked goods and cakes

- Loads of options, but many worry about the sugar content; more of a gap between the more luxury and everyday ones
- Future - room for more luxury options, be mindful of sugar in ingredient list

Breakfast cereals

- Many have cornflakes in the cupboards; not sharing among the family because of cost/taste; some of the packaging less appealing than gluten alternatives
- Future - less functional packaging important here, but taste too

Porridge

- Oats are seen as very healthy; many buying Gluten Free but confusion as some assume naturally Gluten Free while others understand grain cross contamination
- Future - think of how oats can be incorporated into product portfolios – halo effect

Snacks (biscuits, popcorn, crisps and crackers)

- Crisps back on the menu but confusion if Gluten Free naturally; rice & corn cakes in almost all cupboards, crackers and popcorn too; biscuits not shared due to cost/taste (esp families)
- Future - potential for new sub-categories of healthy snacks as well as treats

Baking ingredients

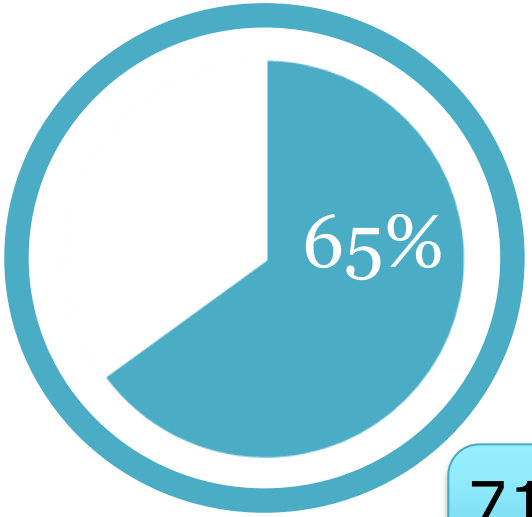
- Big differences between flours in terms of efficacy; Doves Farm cutting through; many find it hard to replicate the fluffiness of gluten baked goods
- Future - room for product innovation here or ways to demonstrate any advances in process

Red categories: Frozen is a key area to focus on for convenience but also cooking ingredients

Noodles	Cooking ingredients e.g. sauces	Frozen foods	Alcoholic drinks (e.g. beer)
Seen as a good alternative to pasta/bread; buckwheat making inroads here	Area where many have to check for gluten on ingredient list as not on front of pack (exception Knorr Gluten Free Gravy/stock); butchers developing own kits	Frozen pizza a big hit, Goodfellas cutting through most here; many buying into frozen wedges; also fish fingers and goujons popular	Many not drinking; some may have eliminated beer as didn't know there Gluten Free alternatives
Future innovation			
More Gluten Free noodle options	Scope for NPD here or clearer front labelling	Again scope for NPD	Appears to be more niche

Most prefer the Gluten Free aisle to be separate

GF9. When it comes to where Gluten Free products are located in store, which of the following would you prefer? (Single Choice)



All Gluten Free products are gathered in one place (e.g. 'free from' section)

Base: n=172
(Gluten Free shoppers)

71% non-Gluten Free shoppers would like products gathered all in one place

Base: n=605(Non Gluten Free shoppers)

At the moment the focus is on the ambient aisle but……. more scope for separate fresh and frozen



Supervalu Blanchardstown



Supervalu Blanchardstown

"A walk through Supervalu bakery is torture"



Being able to have a focal point for Gluten Free products eases the shopping experience – less searching time

The Gluten Free offering can be enhanced by improving availability across On the Go and the 3 aisles

ON THE GO SNACKS:
- Would like bigger offering in convenience stores/garages etc
- Currently rice cakes and cereal bars filling that gap

Ambient

- Biggest aisle in store & has come a long way
- Some ideas: Marinades/sauces/meal kits, more wholefoods/grains – wholegrain/brown pasta

Fresh

- The Fresh aisle is underdeveloped both in bakery and meat, fish & poultry
- Some ideas: Crumbed Ham, meatballs, fish fingers, chicken goujons, donuts, sausage rolls

Frozen

- The frozen aisle isn't always seen as bad for you & cleaner label Gluten Free products would be welcomed
- Some ideas: Tasty freeze to bake bread

The focus on improved offering should be on both in the home and out of home options

Routes to innovation

Short Term

- All in one place not just in ambient – Fresh and Frozen matter too and big areas for development
- Availability of products generally – consistency but also on the go products in e.g. garages
- Bring people to the aisl e.g. tastings

"Finding new building blocks for your dietary routine"
(Woman, 35-44, Clare/Galway)

Mid-term

- Format – separate packaging like pitta pockets
- On the go – products for lunches for example e.g. sausage rolls, travel packs
- Potential for Irish brands to disrupt

"More honest food, wholefoods and less sugar"
(Woman, 34-44, Tipperary/Limerick)

Long-term

- Information/Education re what gluten is and what need to replace it with for healthy long-term nutrition
- App/something to help signpost people – travel
- Low Fodmap products predicted to be a good future innovation – alleviates IBS symptoms
- Dialling up the wholefoods/natural elements of Gluten Free – a holistic approach

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Conclusions and recommendations

Conclusions and recommendations

Rules of engagement for suppliers have changed – market is bigger

- Watch out for different rules across countries
- Keep an eye on information channels e.g. Coeliac Society but also online influencers and the Gluten Free Industry Association

Gluten Free shoppers are not all the same

- Majority are not diagnosed with Coeliac Disease / a wheat allergy, rise driven by lifestyle
- They tend to be more health conscious - keep track of health trends which will impact on shoppers, and if possible ensure that your products meet balanced dietary needs or team up with good pairings e.g. calcium/fibre
- They approach how they do gluten free in different ways so products need to meet their different needs

Brands need to challenge mainstream

- Gluten Free Brands need to cut through more
- Shout louder about bread as the Gluten Free barometer product
- Provenance not a key decision driver – but Irish is a good start

Conclusions and recommendations

Shopping for Gluten Free is hard work, on the go is even harder, and travelling is hardest still	• Ease their shop by locating Gluten Free in one section • Save preparation time by enlarging the On the Go offering
Products should not feel like a compromise: Labelling is currently more important than packaging	• Ensure your current labelling has Gluten Free big in size & clear on the front of packaging • Work towards products which are great and just happen to be Gluten Free
Shoppers quickly move to analysing the product for other reasons, primarily taste, health & price	• Naturalness of products needs to be emphasised – with lesser ingredients especially sugar and fat

Conclusions and recommendations

Gluten Free availability has room for improvement	• Work with retailers to expand supermarket aisles & convenience offerings
NPD around fresh and frozen categories could address gaps	• Room for products shoppers can't/won't make themselves e.g. meatballs, sausage rolls, crumbed ham, par baked bread to bake, donuts
On the go has unique opportunities	• Revisit your product portfolio – what products can be reformulated for On The Go? • What NPD can meet these needs?



The Thinking House

Bord Bia
Irish Food Board

Follow our foundation of good thinking…..

Our way of working with information here at the Thinking House is to always give credit where it's due and show that we know our stuff by doing good groundwork. We're big on putting our research in context, so we've created these handy Endnotes to allow you to follow our train of good thought.

1. Health Canada (2012) Health Canada's Position on Gluten-Free Claims. Available: http://www.hc-sc.gc.ca/fn-an/securit/allerg/cel-coe/gluten-position-eng.php (Accessed: January 2017)

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14. Nielsen (2015) 'FREE FROM' REPORT, IRELAND'S FASTEST GROWING FMCG CATEGORY.

15. Murphy (2015) The 9 Best Gluten Free Products On The Market. Available:https:/lovindublin.com/best-of/the-best-gluten-free-products (Accessed: January 2017)

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Further Information

Coeliac or Gluten Free Associations

- Irish Coeliac Society www.coeliac.ie
- Coeliac UK www.coeliac.org.uk (Have a local group in Northern Ireland)
- The Association of European Coeliac Societies (European Umbrella organisation) www.aoecs.org
- Canada - The Canadian Celiac Association www.celiac.ca
- Coeliac Australia www.coeliac.org.au
- Coeliac NZ - www.coeliac.co.nz
- St Petersburg Coeliac Society www.celiac.spb.ru
- Gluten Free UAE - www.glutenfreeuae.com
- The Celiac Association of Argentina www.celiaco.org.ar

Gluten Free Association

The Gluten Free Industry Association (GFIA) will support companies involved in the manufacture and trade of Gluten Free products. Priorities for 2017 are developing best practice guidelines on ingredient sourcing and gluten-testing methodologies

Trade fairs

- There is one B2B free-from trading and networking platform in Europe Free From Food Expo 8-9 June 2017 Barcelona, Spain http://www.freefromfoodexpo.com/conference-program
- Natural and Organics Products Europe http://www.naturalproducts.co.uk/
- gfafexpo.com - biggest Gluten Free and allergen friendly event in the US
- Gluten Free Expo Canada - www.glutenfreeexpo.ca
- Gluten Free Expo and Conference Melbourne - www.gfexpo.com.au
- Gluten Free Expo Sydney - www.glutenfreeexpo.com.au

Further Information

Gluten Free Bloggers

- glutendude.com
- theglutenfreeblogger.com
- glutenfreegirl.com
- glutenfreemom.com
- www.glutenfreeireland.com – online community

Travel Bloggers

- www.celiactravel.com
- glutenfreeglobetrotter.com
- www.glutenfreeworldwide.com

Useful resources

- www.indi.ie (Irish Nutrition and Dietetic Institute)
- www.thegluten-freeagency.com (Canadian agency that specifically help Gluten Free companies)
- https://supervalu.ie/real-people/food-academy-programme (Supervalu Food Academy)
- https://www.fsai.ie/legislation/food_legislation/food_information_fic/food_information-fic.html (FIC - Food Information to Consumers – Labelling)

Quantitative Questions: Demographics

Fieldwork conducted between 22/02/17 and 01/03/17
n=700 Nationally Representative Sample and n=77 boost of Gluten Free shoppers

GENDER

S1. Are you? (SC)
1.Male
2.Female

AGE

S2. Which of the following age groups do you fall into? (SC)
1. Under 18 years CLOSE
2. 18-24 years
3. 25-34 years
4. 35-44 years
5. 45-54 years
6. 55-64 years
7. 65-75+ years

REGION

S3. In which county do you live? (SC)

DROP-DOWN MENU SHOWING ALL COUNTIES IN ROI

AREA

S4. How would you describe where you live? (SC)

1. Capital city
2. Other large urban area / city
3. Small town
4. Rural

SOCIAL CLASS

S5. What is the occupation of the Chief Income Earner in your household?

1. Higher managerial/ professional/ administrative *(e.g. established doctor, solicitor, board director in a large organisation (200+ employees, top level civil servant/public service employee)*
2. Intermediate managerial/ professional/ administrative *(e.g. newly qualified (under 3 years) doctor, solicitor, board director small organisation, middle manager in large organisation, principle officer in civil service/local government)*
3. Supervisory or clerical/ junior managerial/ professional/ administrative *(e.g. office worker, student doctor, foreman with 25+ employees, salesperson, etc)*
4. Student
5. Skilled manual worker *(e.g. skilled bricklayer, carpenter, plumber, painter, bus/ ambulance driver, HGV driver, AA patrolman, pub/bar worker, etc)*
6. Semi or unskilled manual work*(e.g. manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant)*
7. Casual worker - not in permanent employment
8. Housewife/ Homemaker
9. Retired and living on state pension
10. Unemployed or not working due to long-term sickness
11. Full-time carer of other household member
12. Farmer / Agricultural worker
13. Other

Social Class Codes:
1. ABC1 (CODES 1-4)
2. C2DE (CODES 5-11)

LIFESTAGE QUESTIONS (S6-S8)

S6: Overall, how many children do you have? (SC)
1. None
2. 1 child
3. 2 children
4. 3 children
5. 4 children
6. 5 or more children

If code 2-4 @ S6

S7: Do some or all of your children currently live in your household? (SC)
1. Yes
2. No, **none** of my children currently live in my household

If code 1 @ S7

S8: How old is the eldest child living in your household? SC
1. 5 years old or under
2. 6 – 11 years old
3. 12 – 17 years old
4. 18 or older

LIFESTAGE CODES

1. Pre-family: (S2=2;3;4;5;6)&(S6=1)
2. Young family: S8=1
3. Mid family: S8=2
4. Older family: S8=3;4
5. Empty Nester: S7=2
6. Older (44+), no kids: (S2=6;7;8;9;10,11)&(S6=1)

Quantitative Questions

Fieldwork conducted between 22/02/17 and 01/03/17
n=700 Nationally Representative Sample and n=77 boost of Gluten Free shoppers

SCREENER

S9. Which of these types of food do you regularly buy? MC

1. Free from
2. Gluten Free
3. Wheat Free
4. Lactose Free
5. Sugar Free
6. Dairy free

All of those selecting code 2 are classed as 'Gluten Free shoppers' and qualify for the boost sample

GLUTEN FREE BUYERS

ASK GLUTEN FREE BUYERS ONLY

GF2. When you say you buy Gluten Free products, who is this for? MC

1. Myself
2. Partner/Spouse
3. Child/Children
4. Parent
5. Other (Please specify)

INSERT RELEVENT PEOPLE FROM GF2
GRID SINGLE CHOICE

GF3. And for each person, please indicate the main reason they eat Gluten Free products? SC

1. Diagnosed as Coeliac by a doctor / consultant following tests
2. Diagnosed with a wheat allergy by a doctor/consultant following tests
3. Gluten intolerance / sensitive to gluten (based on testing and diagnosis by a dietician / medical professional / kinesiologist)
4. Gluten intolerance / sensitive / to gluten (self diagnosed / without testing)
5. No intolerance, just choose not to eat gluten / limit Gluten Free in my diet
6. Just eat it because it's what's available in the house

ASK GLUTEN FREE BUYERS ONLY
GRID SINGLE CHOICE

GF4. For each of the food types below, please indicate how good or bad you feel the Gluten Free options tend to be. This can be either in supermarkets or when eating out.

- Very good Gluten Free options
- Some Gluten Free options, but could be better
- Very poor Gluten Free options
- Not a category I consider buying Gluten Free

1. Meat/poultry/fish
2. Pre packed Bread
3. Baked goods and cakes
4. Baking ingredients
5. Pasta
6. Noodles
7. Cooking ingredients e.g. sauces
8. Breakfast Cereals
9. Porridge
10. Frozen foods
11. Alcoholic Drinks e.g. beer
12. Snacks (biscuits, popcorn, crisps and crackers)

Quantitative Questions

Fieldwork conducted between 22/02/17 and 01/03/17
n=700 Nationally Representative Sample and n=77 boost of Gluten Free shoppers

ASK ALL
OPEN ENDED

GF5. When you hear the term 'Gluten Free', what are the first things that pop into your mind?

Please list the first 3 words or phrases below

GF6. Which of the following are the main reasons for choosing to buy Gluten Free products?

Please rank your top 3 in order for the list below

1. Advice from doctor/consultant
2. Advice from dietician
3. Gluten Free products are healthier
4. Gluten is not good for you
5. To manage my weight
6. To avoid symptoms like bloatedness
7. To avoid digestive symptoms (e.g. diarrhoea, gas)
8. I've heard it's better for you so I want to try it out
9. To get more energy and reduce tiredness
10. A positive intolerance test from a pharmacist/kinesiologist
11. To have them in the press/cupboard for visitors
12. Other (Please specify)

GF7. Which of the following are the main reasons why you would NOT choose to buy Gluten Free products?

Please rank your top 3 in order for the list below

1. It's a fad
2. I think Gluten Free products have higher sugar content
3. I think Gluten Free products have higher fat content
4. They are not healthy
5. Too expensive
6. Not available
7. They do not taste as good as other products
8. They don't look as appealing as other products
9. I/ we wouldn't eat a whole pack and there would be too much waste
10. I have to look for them in a section I don't normally shop

SINGLE CHOICE GRID

GF8. Think now in terms of buying Gluten Free products v buying other, not-Gluten Free products

For each of the factors on the list below, please indicate whether you feel it is more important or less important when buying Gluten Free

Much less important for Gluten Free	A little less important for Gluten Free	Equally important for Gluten Free and non-Gluten Free	A little more important for Gluten Free	Much more important for Gluten Free
1	2	3	4	5

1. Buying a brand product (rather than shop's own brand / private label)
2. Getting the best offers
3. Made in Ireland
4. Taste
5. Clear information/ ingredients on pack
6. Long shelf-life
7. Availability of good foods for 'on-the-go'

SINGLE CHOICE

GF9. When it comes to where Gluten Free products are located in store, which of the following would you prefer?

1. All Gluten Free products are gathered in one place (e.g. the 'free-from' section)

2. Gluten Free products are found in with regular products (e.g. all Gluten Free bread or pasta in with the regular bread and pasta)

The Thinking House

BORD BIA INSIGHT CENTRE

Go raibh maith agaibh

Bord Bia

Irish Food Board

SPARK

The Strategic Research Agency