

A person is holding two sandwiches in a white paper bag. The sandwiches are made with whole-grain bread and contain various fillings including cheese, meat, and vegetables. The background is a blurred image of a person's torso and arms.

Natasha's Law

CGA and Access Group

Online survey in field April
2021 exploring Natasha's
Law with a sample of...

1,000

nationally representative GB
consumers who eat out at
least once every 6 months

Consumers' eating out needs are complex, with nearly 40% having special dietary requirements

39%

Of GB consumers either have a food allergy / intolerance or a dietary preference / restriction

35%

Of GB consumers have a dietary preference / restriction

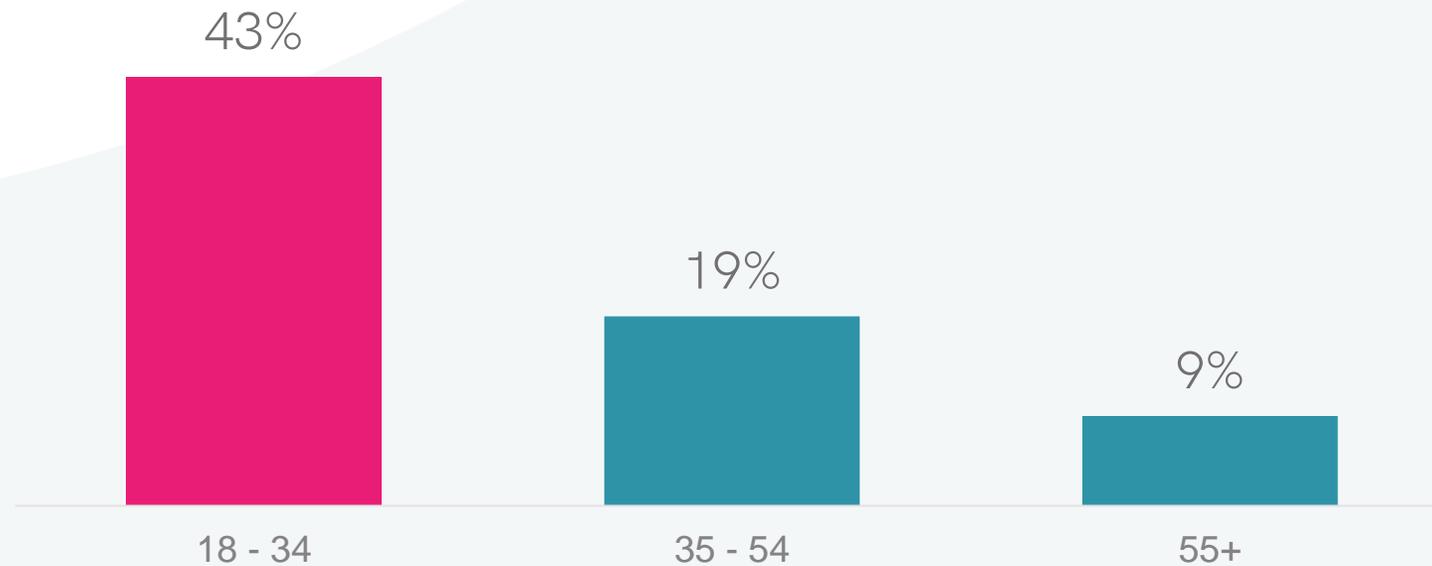
22%

Of GB consumers have a food allergy / intolerance



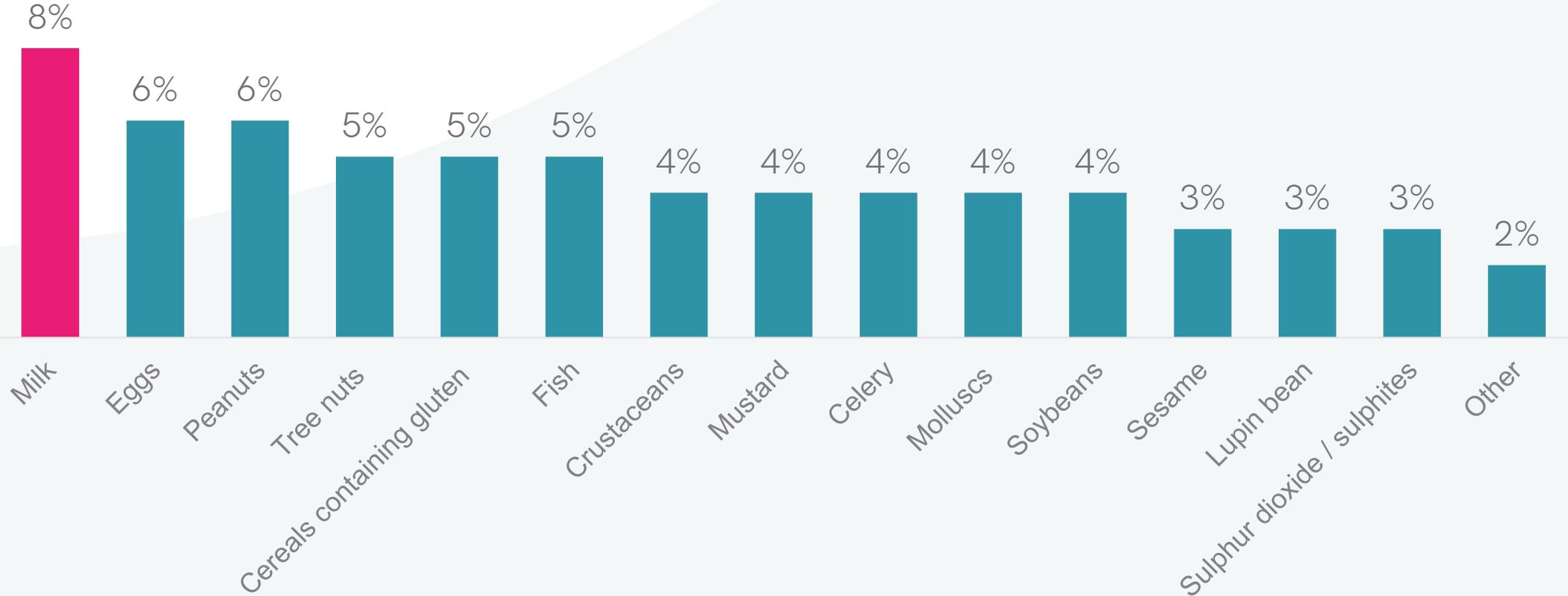
Significantly it's the youngest age group who are driving these dietary requirements

Proportion of each age group who either have a food allergy / intolerance or a dietary preference / restriction



Consumers have a broad range of food allergies or intolerances, with milk being the most common at 8% of the population

% of GB consumers who have a food allergy or intolerance to the following:

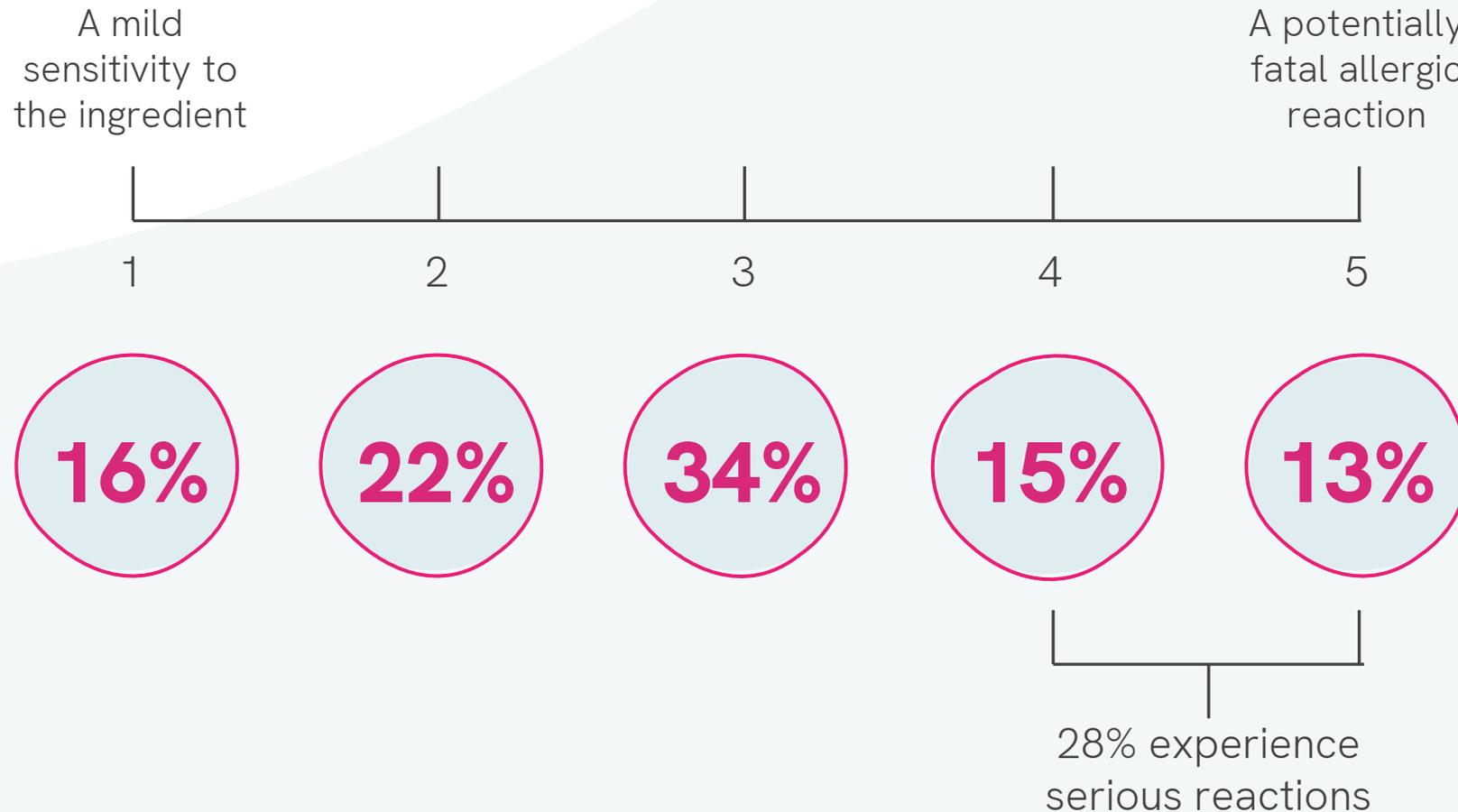


Sample size: 1000



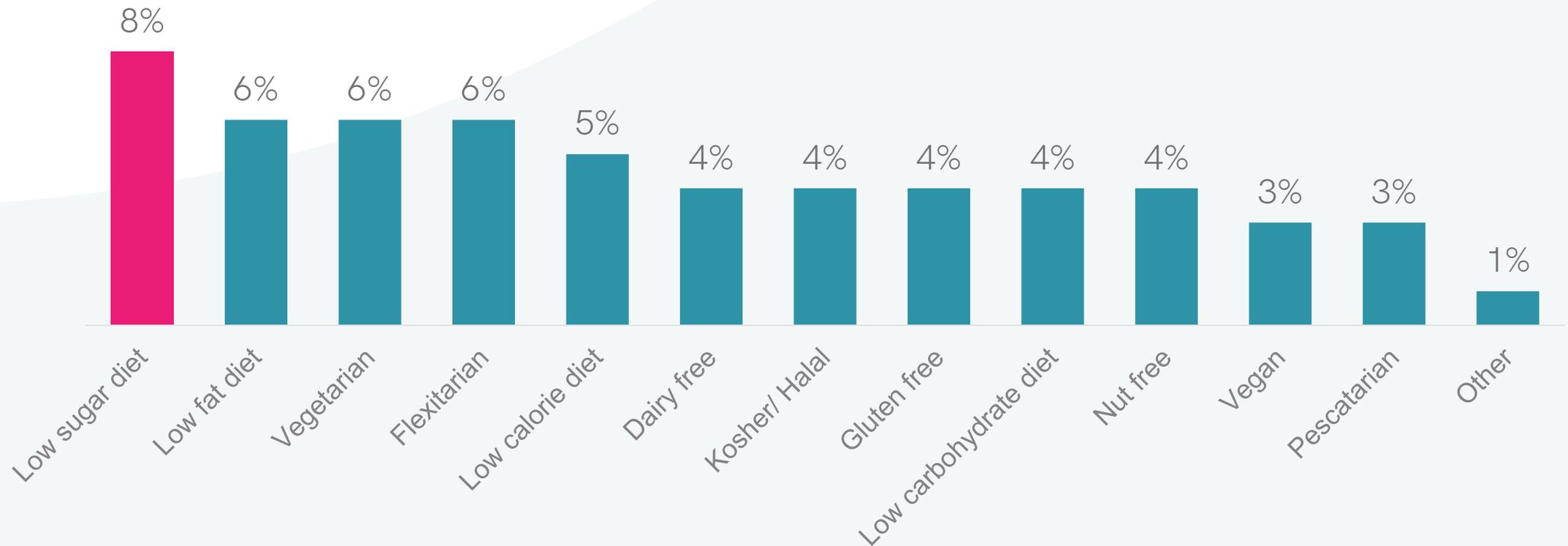
Over a quarter of consumers with food allergies / intolerances can experience serious reactions to ingredients

How extreme would you describe your reactions to these ingredients, where 1 is mild and 5 is extreme?



GB consumers have a broad spectrum diets, with several featuring as preferences over restrictions, such as vegetarianism

% of GB consumers who have the following dietary preferences or restrictions:



Over 1 in 7 consumers with serious food allergies / intolerances feel that they can't trust the food they eat out

15%

Of consumers with serious food allergies or intolerances are 'not very' or 'not at all confident' that they can trust the content of their food when out

+3pp

vs consumers with food allergies or intolerances

+7pp

vs consumers with dietary preferences or restrictions

+9pp

vs the average GB consumer





26%

Of GB consumers are fully aware of Natasha's Law

34% are aware but don't know much about it

There is significant opportunity to educate consumers on Natasha's Law, particularly those who will benefit most from it

44%

Of consumers with a food allergy or intolerance are fully aware of the law

54%

Of consumers with serious food allergies or intolerances are fully aware of the law



Consumers with food allergies or intolerances are in favour of the law

“Allows the consumer to identify intolerances **safely and easily**”

“Needed to **protect** those with food allergies”

“This will make a **big impact** for those with allergies, this should have happened a long time ago”

“It gives me **more confidence** eating out”

“A **necessary law** that should have been put in place years ago”



Whilst even those without allergies or intolerances show support

"I think this is a **positive** law which will bring greater transparency to food labelling"

"A step in the right **direction**, food outlets need to take allergies more seriously"

"This law is **long overdue**"

"Great idea, could **save many lives** or unnecessary health problems"

"A positive step needed for peace of mind for a great number"



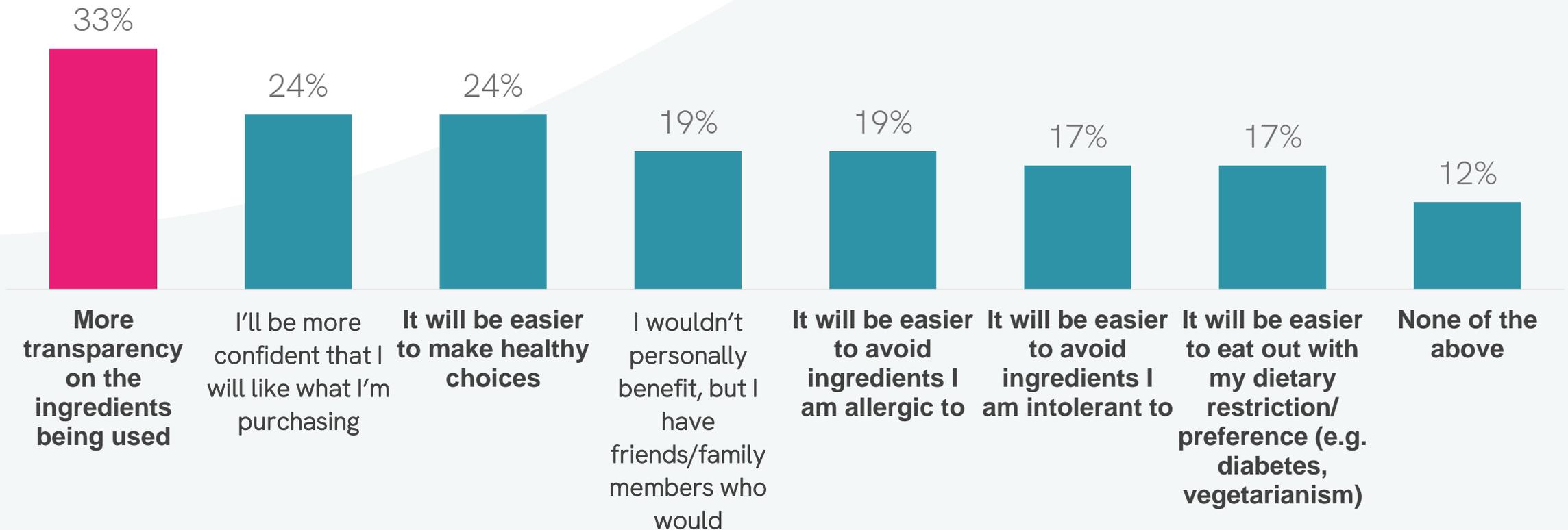
84%

Of consumers agree
that **Natasha's Law** is a
positive change
(43% strongly agree)



Though just 39% of GB have dietary requirements, 88% would personally feel the benefits of the law or know someone who will

Which, if any, of the following would you benefit from once Natasha's Law is in place?



Three quarters of consumers with serious food allergies find full ingredient lists on pre-packaged food appealing, whilst consumers with dietary restrictions or preferences are even more likely to find this appealing

75%

Of consumers with serious food allergies or intolerances find the find the idea of having a full ingredient list on pre-packaged food 'very' or 'quite appealing'

+5pp

vs consumers with food allergies or intolerances

-1pp

vs consumers with dietary preferences or restrictions

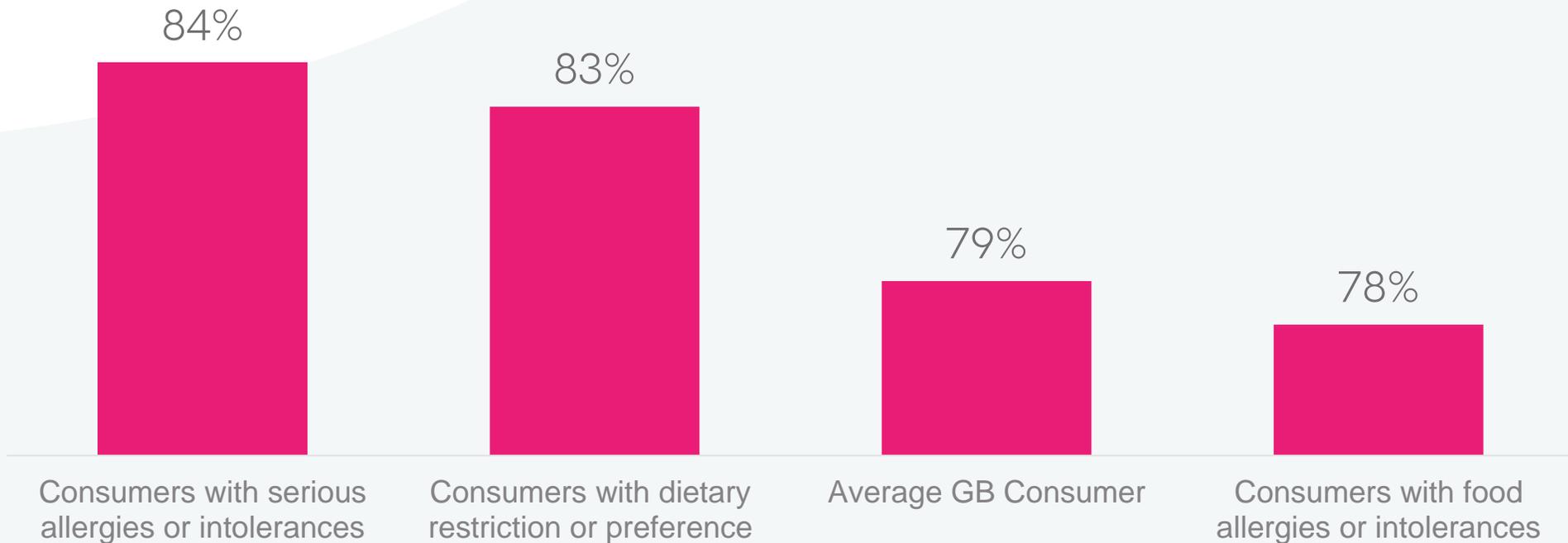
+4pp

vs the average GB consumer



Most groups want to see the law extended to all out of home food with those with serious allergies or intolerances feeling most strongly

Proportion who 'agree' or 'strongly agree' that Natasha's Law should be extended to all food consumed out of home and not just pre-packaged food:



Trust in the content of pre-packaged food is likely to improve dramatically once Natasha's Law is in place, particularly amongst consumers with serious food allergies and dietary requirements

+12pp

vs consumers with
food allergies or
intolerances

+16pp

vs the average GB
consumer

+7pp

vs consumers with
dietary preferences
or restrictions

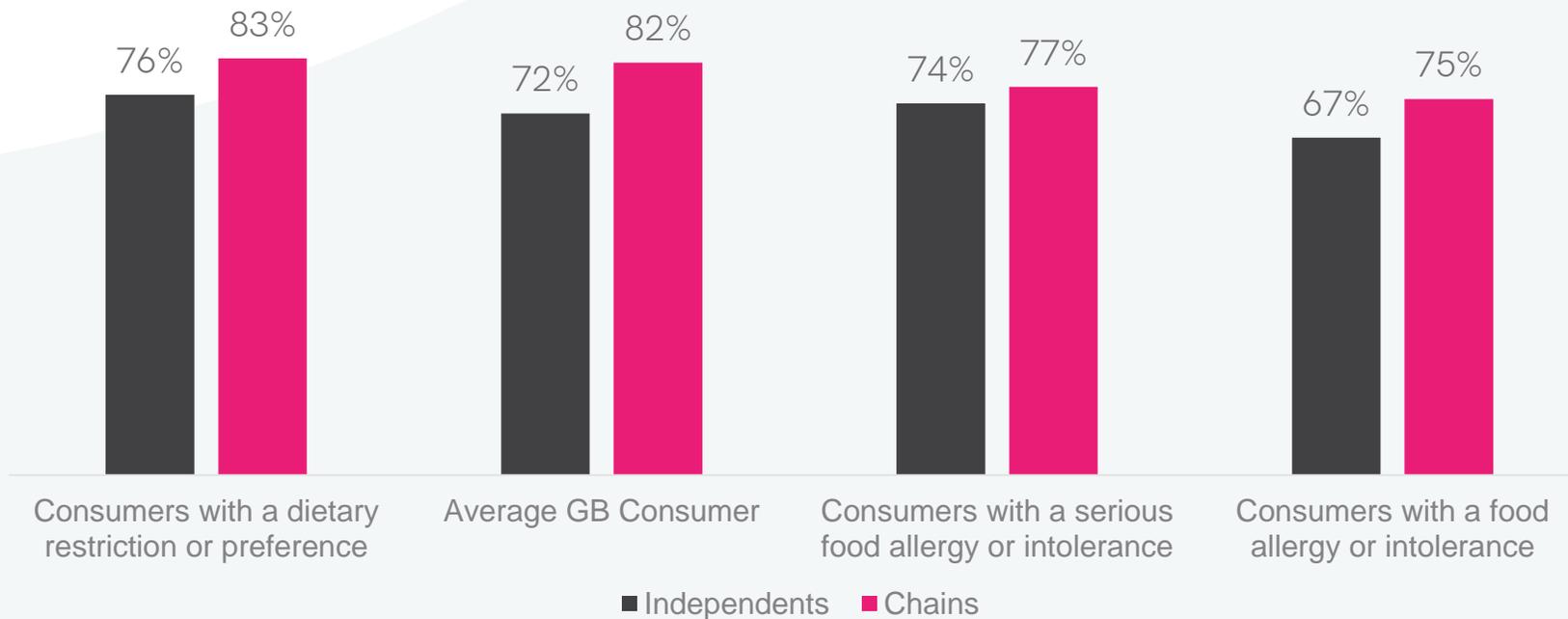
87%

Of consumers with serious food allergies or intolerances will feel 'more' or 'much more' confident in trusting the content of pre-packaged food out-of-home once Natasha's Law is in place



Consumers are more likely to trust the ingredient lists on pre-packaged food from chains than independent outlets

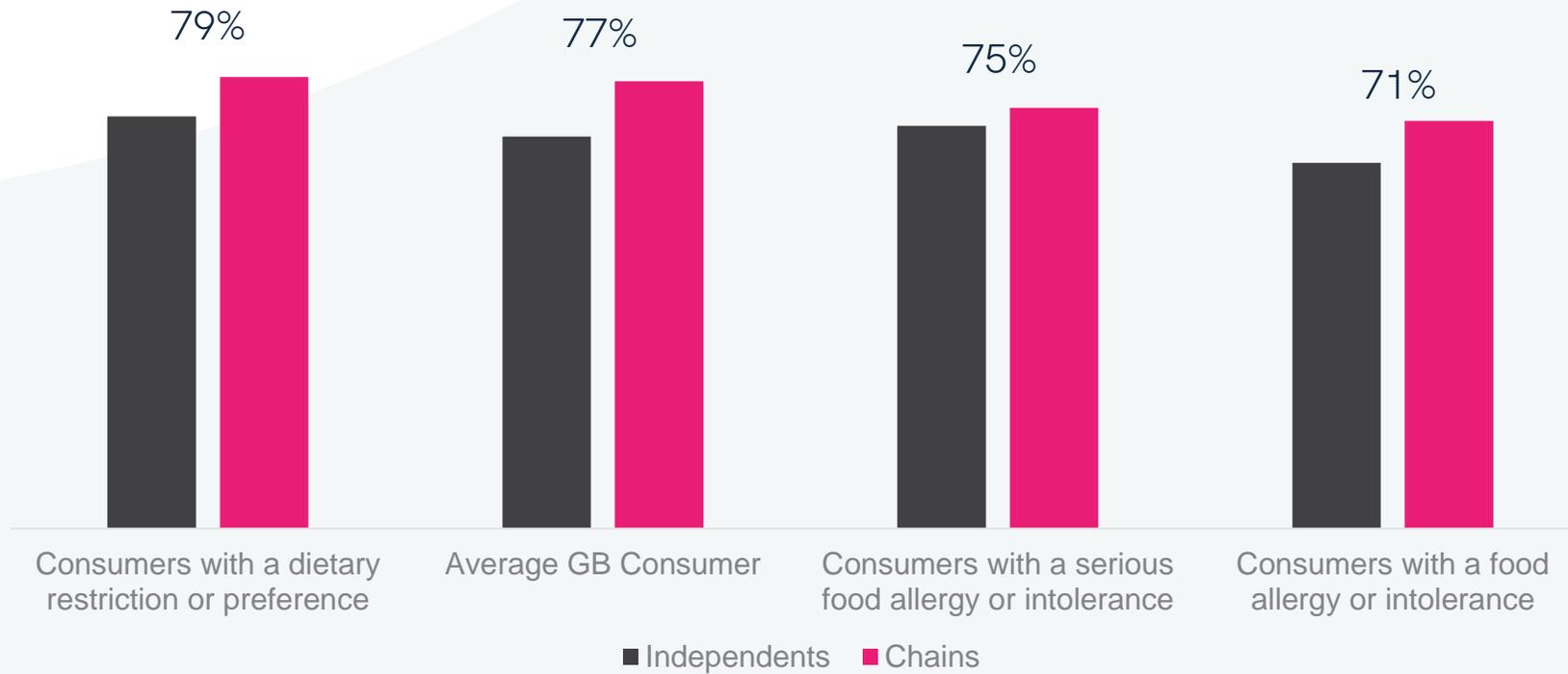
% who believe that ingredient lists on pre-packaged food will be 'very' or 'quite reliable' in the following venue types once Natasha's Law has been rolled out:



Consumers with allergies are less likely to trust ingredient lists than average consumers or those with dietary requirements

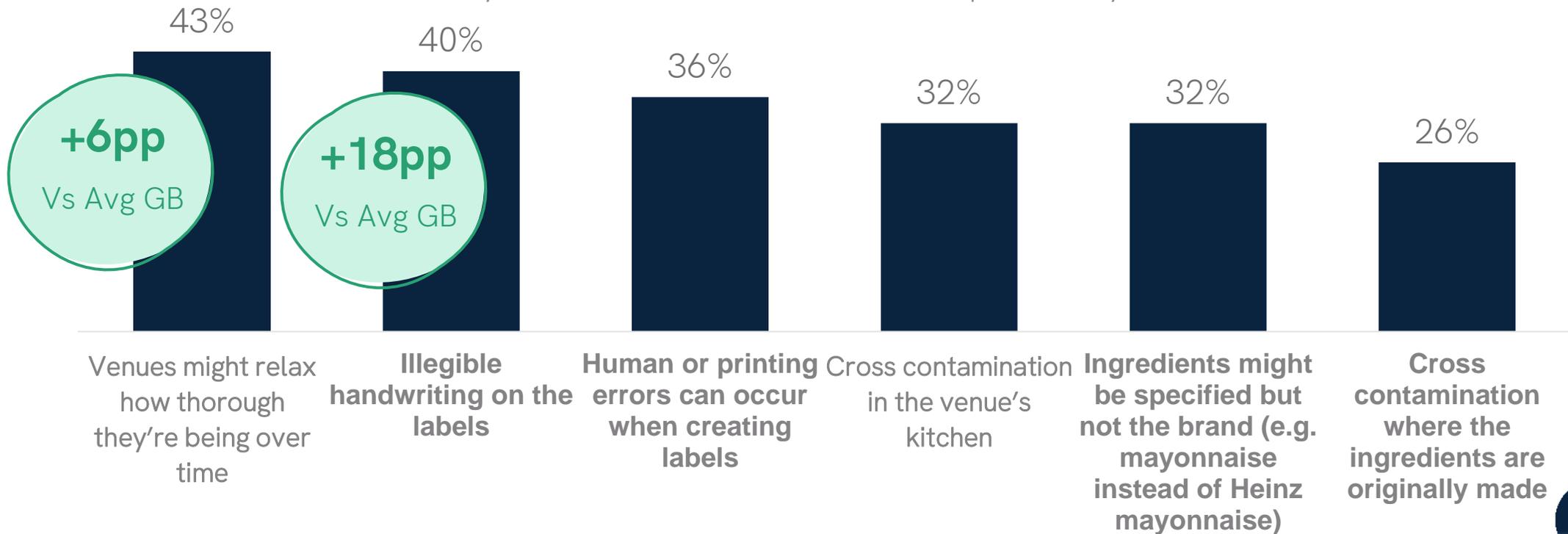
% who believe that ingredient lists on pre-packaged food will be 'very' or 'quite reliable' in the following venue types once Natasha's Law has been rolled out:

Average across venue types:



Consumers who depend on accurate ingredient lists most expect to distrust labels due to venues relaxing over time or illegible handwriting, factors that can easily be rectified

You've said that you don't expect ingredient lists on pre-packaged food to be fully reliable when Natasha's Law is in place. Why is this?



Consumers with serious food allergies aren't prepared to trust labels yet, with over half predicting they'll still have to check the ingredients with staff every time they make a purchase

+13pp

vs consumers with
food allergies or
intolerances

+20pp

vs consumers with
dietary preferences
or restrictions

Once the law has come into effect:

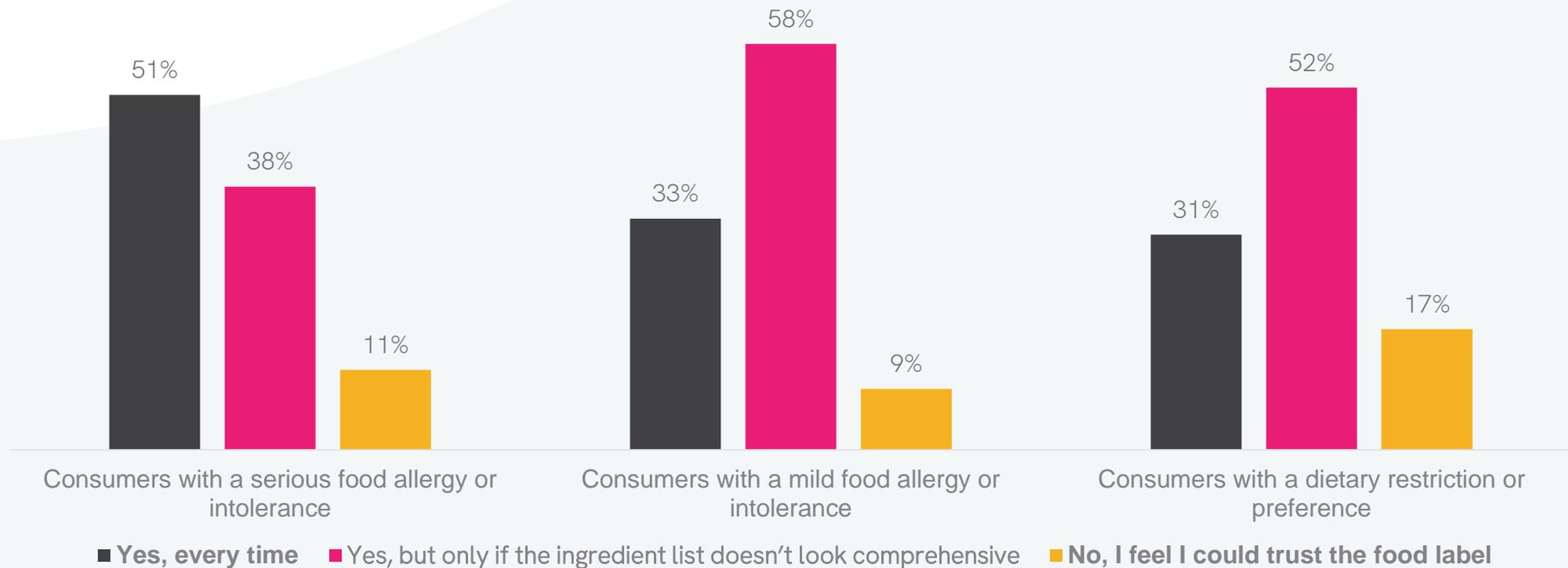
51%

Of consumers with serious food allergies or intolerances would still feel the need to double check the ingredients with staff every time they purchase pre-packaged food



Consumers with mild allergies or dietary requirements are less inclined to check the ingredients with staff if the label looks comprehensive

Would you still feel the need to double check the ingredients with someone who works at the venue once Natasha's Law has come into effect?



Consumers hold some reservations about the law

"It may be difficult to list every ingredient on small food items due to **lack of space**"

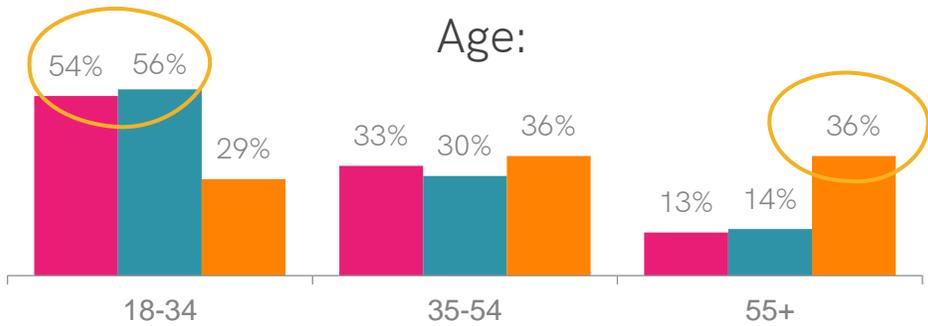
"I worry not all outlets will **comply**"

"Unsure how **reliable** the information will be"

"It will limit flexibility in **small business** environments"

"The information has to be shown in **easy to read** format - may be too small"

Consumers with food allergies or intolerances are valuable to the market, as they are likely to visit and spend more than the average consumers



Consumers with a serious food allergy/intolerance

Vs

Consumers with a food allergy/intolerance

Vs

Average GB consumer

% eating out weekly:



Average monthly spend eating/drinking out:



Gender:



Income:



Residence:



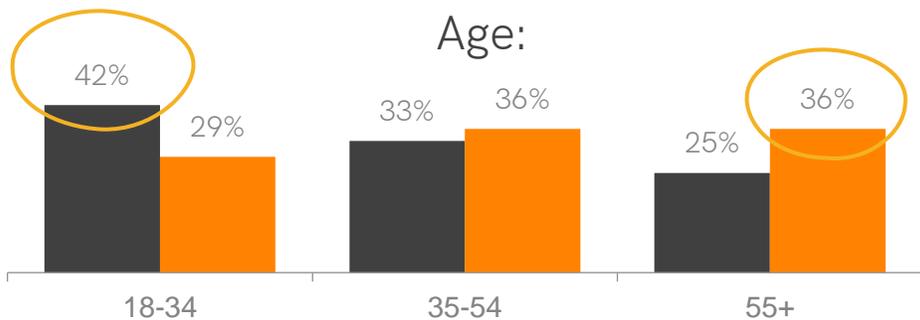
White collar profession:



Parents:



Consumers with dietary restrictions or preferences are female-biased and frequent visitors to the out-of-home



Consumers with a dietary restriction / preference

Vs

Average GB consumer

% eating out weekly:



Average monthly spend eating/drinking out:



Gender:



Income:



Residence:



White collar profession:

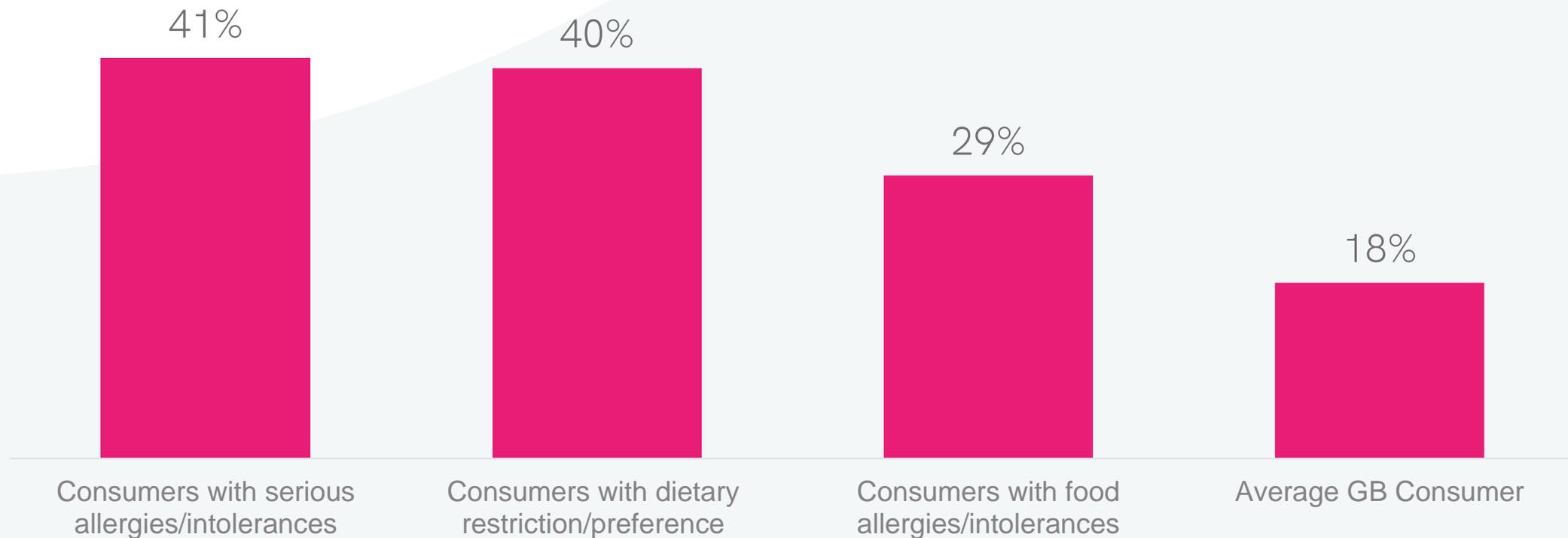


Parents:



Consumers with dietary requirements or food allergies/ intolerances tend to purchase food-to-go more often than average the GB consumer

Proportion who purchase food-to-go at least weekly from the average outlet*



Outlets should make protecting their core market for pre-packaged food their priority by ensuring they follow Natasha's Law rigorously, which in turn is only likely to increase frequency of purchase amongst these groups

61%

Of consumers with serious food allergies or intolerances are likely to purchase food-to-go 'more' or 'much more' frequently than they did previously once Natasha's Law is in place

+7pp

vs consumers with food allergies or intolerances

+20pp

vs consumers with dietary preferences or restrictions

+21pp

vs the average GB consumer



Summary

- + With 39% of GB consumers having some form of dietary requirement, it is essential that outlets cater to these needs. Frequent visitors to the out-of-home -18-34 year olds - have the most demanding dietary needs, suggesting that addressing their needs could be lucrative.
- + When 28% of consumers with food allergies or intolerances experience serious or potentially life-threatening reactions to ingredients, it is imperative that consumers are well-informed on the content of their food.
- + Though awareness of Natasha's Law is relatively high at 60% of GB only 26% are fully aware. More should be done to educate those who will benefit most from the law as 44% of those with a food allergy or intolerance are not fully aware of the law. In turn, these consumers with allergies/ intolerances are less likely to agree that Natasha's Law should be extended to all food consumed out-of-home, suggesting that they need to be brought on board with the legislation.
- + As a whole, consumer response to Natasha's Law is overwhelmingly positive, with consumers able to pick out the benefits of the law, including those who aren't allergic to ingredients. Greater transparency was the number 1 perceived advantage of the law, voted by a third of GB consumers. The law has the widespread appeal, with consumers who have dietary restrictions/ preferences finding full ingredient lists on pre-packaged food even more appealing than consumers with serious food allergies.

Summary

- + 87% of consumers with serious food allergies/ intolerances stated that they will feel more confident trusting the content of pre-packaged food once the law is in place.
 - + Consumer trust is likely to vary depending on the type of outlet, with more consumers believing that ingredient lists on pre-packaged food will be more reliable in chains than in independents.
 - + Venues can try conquer this perception by providing legible labels and demonstrating that they won't relax this practice, as these are the top two concerns amongst consumers with serious allergies intolerance. Thorough labels are also likely to reduce the number of consumers double checking ingredients with staff.
- + To summarise, consumers with special dietary requirements are highly valuable to the out-of-home market, visiting and spending more than the average GB consumer. They are also more likely to frequently purchase food-to-go compared to the average GB consumer and therefore make up an important segment of this market. Adhering to Natasha's Law will be a worthy investment of resources as the law is likely to increase rate of purchase of pre-packaged food, particularly in those who already purchase it most often.