



Food
Standards
Agency
food.gov.uk



Allergen Segmentation



July 2021

Author: Lucy King

Contents

The importance of knowing our different audiences	3
1. Clinically diagnosed segment	4
Segment demographic breakdown	4
Where they live in the UK	4
Their trust in the FSA	5
Why they avoid certain foods	5
Food consumption and eating out	5
How we can reach them	6
2. Undiagnosed segment	7
Segment demographic breakdown	7
Where they live in the UK	7
Their trust in the FSA	8
Why they avoid certain foods	8
Food consumption and eating out	8
How we can reach them	9
3. Selective avoiders segment	10
Segment demographic breakdown	10
Their trust in the FSA	11
Why they avoid certain foods	11
Food consumption and eating out	11
How we can reach them	12

The importance of knowing our different audiences

Consumer segmentation is a way of grouping consumers based on common characteristics. It is used by organisations, including the FSA, to better understand different groups and how to reach them.

For our different allergen audiences, it is important to find out how their attitudes and behaviours relating to food avoidance differ and how this may affect their food consumption and eating out habits. This is essential for effective communications and helps us to shape food safety policy specially related to allergen guidance.

The audiences in this document have been created using attitudinal and behavioural segmentation that categorises people based on their attitudes to food and their reported food consumption.

The segmentation was conducted using Wave 5 of the Food and You Survey data and cluster analysis and has resulted in three distinct segments.

These segments were amalgamated with external datasets to provide wider consumer insights, including media consumption.

We have named our three audience segments:

1. Clinically diagnosed
2. Undiagnosed
3. Selective avoiders

Please note

- An attitudinal segmentation is just one way to think about our consumers and how they may differ.
- There aren't always defining demographic traits to the segments because the same attitudes can be shared by a demographically diverse group of people.

1. Clinically diagnosed segment

The Clinically diagnosed consumer segment account for 8% of our audience.

“I have a clinically diagnosed allergy / intolerance that means I have to avoid certain foods.”

They have adverse reactions to certain foods and have a food allergy or food intolerance which has been diagnosed by an NHS or private medical practitioner.

Clinically diagnosed are more likely to be female and in their mid-thirties and early-forties. They are more likely to be unemployed and seeking work. They tend to have lower incomes. They are more likely to report poor health and higher levels of anxiety.

Most tend not to enjoy cooking and dislike trying new food. Provision of allergy information is very important to them when eating out. They tend to have low levels of trust in people. However, they are generally trusting of the FSA.

Segment demographic breakdown

- 61% Are female (average: 51%)
- 22% Are aged 35 to 44 years old (average: 16%)
- 8% Are unemployed and seeking work (average: 4%)
- 32% Have an annual household income below £26,000 (average: 25%)

Where they live in the UK

- North East: 5%
- North West: 11%
- Yorkshire & Humberside: 5%
- East Midlands: 10%
- West Midlands: 7%
- East of England: 13%

- London: 19%
- South East: 16%
- South West 9%
- Wales: 3%
- NI: 2%

Their trust in the FSA

- 48% Thought there was a **high likelihood** that if they reported a food related issue to the FSA, the problem would be looked into (Average: 44%)
- 65% Thought there was a **high likelihood** that if new evidence about food safety came to light, the FSA would inform the public (Average: 59%)
- 37% Thought that there was a **high likelihood** that the FSA is impartial (Average: 44%)

Why they avoid certain foods

- 47% Have a clinically diagnosed allergy (Average: 2%)
- 62% Have a clinically diagnosed intolerance (Average: 3%)
- 88% Suffer adverse reactions to foods (Average: 17%)
- 8% Have a gluten intolerance (Average: 1%)
- 13% Have a lactose intolerance (Average: 1%)

Food consumption and eating out

- 23% Do not enjoy cooking (Average: 18%)
- 25% Dislike trying new foods (Average: 18%)
- 3% Never eat chicken or turkey (Average: 7%)
- 28% Say the provision of allergy information is very important when deciding where to eat out (Average: 8%)

How we can reach them

They are more likely to:

- Receive TV through Virgin Media, and watch Channel 4 (56%), ITV (52%), BBC1 (50%), BBC 2 (50%) and Channel 5 (45%)
- Use on-demand or streaming services
- Use social media, in particular, Facebook
- Go online to compare products or services and look or apply for jobs

They are less likely to:

- Read a newspaper, but when they do, The Sun is a popular choice
- Read online news sites, but when they do, BBC News (50%), Google News (25%), CNN (22%), Mail on Sunday (22%) and Metro (22%) are the most popular choices
- Listen to the radio, but when they do, BBC Radio 1 (27%), Capital FM (27%), local radio (25%), Heart (23%) and BBC Radio 2 (22%) are the most popular choices
- Read magazines, but when they do, Sainsbury's Magazine and Tesco Magazine are the most popular choices

2. Undiagnosed segment

The Undiagnosed consumer segment account for 20% of our audience.

“I experience adverse reactions to certain foods, but I've never been diagnosed with an allergy or intolerance.”

They have adverse reactions to certain foods (or avoid particular foods because of the adverse reaction they might cause) but have not been diagnosed by an NHS or private medical practitioner as having a food allergy or food intolerance.

This group tend to enjoy cooking, are interested in healthy food, and are more likely to eat out than average, despite a large proportion of group members reporting adverse reactions to certain foods.

Cluster members are likely to be older, female, well-educated, and retired with mid-range incomes. They are more likely to have below average health and lower than average mental health. They have a high sense of civic duty.

Segment demographic breakdown

- 57% Are female (Average: 51%)
- 40% Have a degree (Average: 32%)
- 24% Aged 16 - 34 (Average: 30%) – this group are more likely to be older
- 27% Are retired (Average: 22%)
- 297% Have an annual household income between £26,000-£51,999 (Average:24%)

Where they live in the UK

- North East: 3%
- North West: 10%
- Yorkshire & Humberside: 9%
- East Midlands: 7%
- West Midlands: 9%

- East of England: 12%
- London: 11%
- South East: 19%
- South West 14%
- Wales: 4%
- NI: 3%

Their trust in the FSA

- 43% Thought there was a **high likelihood** that if they reported a food related issue to the FSA, the problem would be looked into (Average: 44%)
- 60% Thought there was a **high likelihood** that if new evidence about food safety came to light, the FSA would inform the public (Average: 59%)
- 40% Thought that there was a **high likelihood** that the FSA is impartial (Average: 44%)

Why they avoid certain foods

- 17% Have an allergy that is not clinically diagnosed (Average: 3%)
- 50% Have a food intolerance that is not clinically diagnosed (Average: 9%)
- 3% Have a gluten intolerance (Average 1%)
- 5% Have a lactose intolerance (Average: 1%)

Food consumption and eating out

- 52% More likely than average to eat out in a café (Average: 47%)
- 36% Say the provision of healthy options is very important when deciding where to eat out (Average 28%)

How we can reach them

They are more likely to:

- Read The Guardian, Daily Telegraph and The Times. Their top weekly newspaper is The Sunday Times
- Read online news sites, like BBC News (58%), Google News (35%), Channel 4 News (33%) and a local newspaper site (30%)
- Listen to BBC Radio 1 (33%), Capital FM (28%), local radio (30%), Heart (35%) and BBC Radio 2 (30%) are the most popular choices
- Read magazines like Sainsbury's Magazine, Tesco Magazine, BBC Good Food and Boots
- Receive TV through Freeview (45%) and Sky Digital (36%), watching BBC1 (61%), Channel 4 (57%), ITV (57%), BBC 2 (50%), Channel 5 (46%) and E4 (41%)

They are less likely to:

- Use on-demand or streaming services
- Use social media, but when they do, they use Facebook (36%) and Twitter (19%) for news
- Go online. However, they are more likely to look on government websites for public services information (21% versus average of 13%)

3. Selective avoiders segment

The Selective avoiders segment account for 14% of our audience.

"I avoid certain foods because I choose to, not because of allergies or intolerances."

They do not have food allergies or intolerances, however, they avoid certain foods for other reasons, such as vegetarianism.

Selective Avoiders like trying new foods and are interested in healthy options. They are less likely to eat ready meals.

Selective Avoiders tend to be younger, single, in good health, well-educated and have higher than average incomes.

The cluster includes a higher-than-average proportion of people from non-white ethnic backgrounds. They report good physical and mental health and high levels of life satisfaction.

Segment demographic breakdown

- 41% Are female (average: 51%)
- 42% Are aged 35 to 44 years old (average: 16%)
- 28% Are unemployed and seeking work (average: 4%)
- 31% Have an annual household income below £26,000 (average: 25%)
- 43% Have a degree (Average: 32%)
- 29% Have an annual household income above £52,000 (Average: 23%)

Where they live in the UK

- North East: 2%
- North West: 13%
- Yorkshire & Humberside: 11%

- East Midlands: 9%
- West Midlands: 8%
- East of England: 8%
- London: 24%
- South East: 13%
- South West: 7%
- Wales: 3%
- NI: 2%

Their trust in the FSA

- 42% Thought there was a **high likelihood** that if they reported a food related issue to the FSA, the problem would be looked into (Average: 44%)
- 58% Thought there was a **high likelihood** that if new evidence about food safety came to light, the FSA would inform the public (Average: 59%)
- 43% Thought that there was a **high likelihood** that the FSA is impartial (Average: 44%)

Why they avoid certain foods

They do not have food allergies or intolerances, however, avoid certain foods for other reasons.

- 17% Are vegetarians (Average: 3%), 4% are vegan (Average: 1%) and 38% are part-vegetarian (Average: 7%)
- 43% Report avoiding food for other non-specific reasons (Average: 12%)

Food consumption and eating out

- 13% Dislike trying new foods (Average: 18%)
- 44% Never eat beef, lamb or pork (Average: 13%), 50% never eat burgers (Average: 24%), and 31% never eat chicken (Average: 7%)

- 85% Eat fruit at least 3-4 times a week (Average: 80%), 80% eat raw veg at least 3-4 times a week (Average: 66%)
- 41% Never eat ready meals (Average: 34%)
- 38% Say the provision of healthy options is very important when deciding where to eat out (Average 28%)

How we can reach them

They are more likely to:

- Read The Guardian, Daily Mail and The Times. Their top daily newspaper are local newspapers (they have higher than average readership of London Evening Standard and Manchester Evening News) and their top weekly newspapers are The Times and Mail on Sunday
- Read online news sites, like BBC News (61%), Google News (36%), Channel 4 (37%) and Metro (34%)
- Listen to Capital FM (30%) and KISS (24%). They listen to BBC Radio 3, LBC and talkSPORT more than the average. For news they are most likely to listen to BBC Radio 4 and BBC Radio 1
- Read magazines like Which, Sainsbury's Magazine, Tesco Magazine and BBC Good Food
- Receive TV through Sky Digital (37%) and Virgin Media (20%), watching BBC1 (60%), Channel 4 (55%), ITV (55%) and BBC 2 (50%). They watch Sky Sports and BBC 4 more than the average
- Use on-demand or streaming services
- Use social media, in particular, Facebook. For news they also use WhatsApp
- Go online to pay bills and look up information for leisure time



© Crown copyright 2021

This publication (not including logos) is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

For more information and to view this licence:

- visit [the National Archives website](#)
- email psi@nationalarchives.gov.uk
- write to: Information Policy Team, The National Archives, Kew, London, TW9 4DU

For enquiries about this publication, [contact the Food Standards Agency](#).



Follow us on Twitter: [@foodgov](#)



Find us on Facebook: facebook.com/FoodStandardsAgency