

LANDMARK RESEARCH FINDINGS

GLUTEN FREE & ALLERGEN FRIENDLY LIFESTYLES: PAST, PRESENT & FUTURE

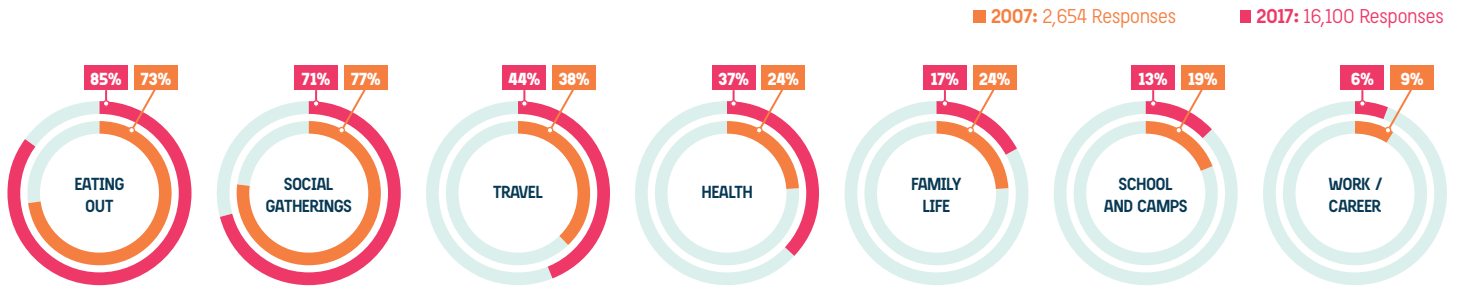


Ten years ago, thousands of consumers and businesses across the globe shared their experiences about gluten free and food allergy lifestyles through groundbreaking research. So the question naturally arises: **Ten years later – where are we?**

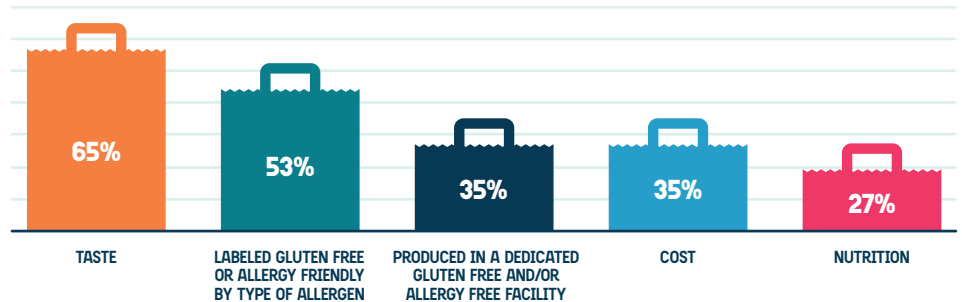
This innovative study focuses on quality of life; gluten free and allergy friendly products; eating out, restaurants and travel as well as overall progress and future change. Over 16,000 consumers impacted by celiac / coeliac disease, gluten free diets and food allergies participated in the research representing all 50 US states and 35+ countries.

The global market research is funded & sponsored exclusively by **Gluten Free Passport** and **Gluten Free Media Group**.

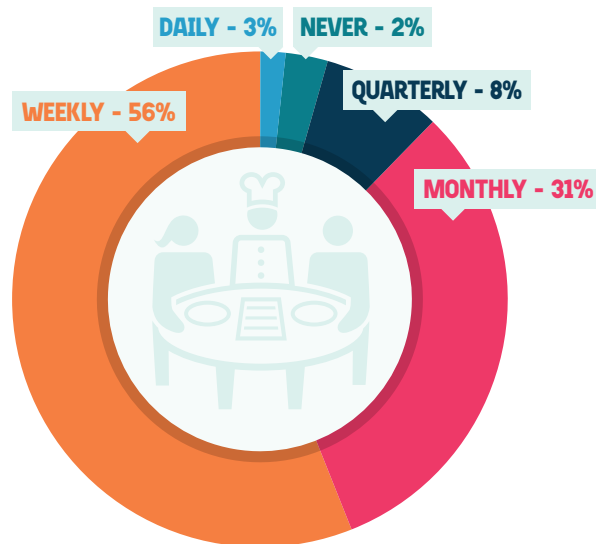
➔ Eating out, social gatherings & travel are the top three areas impacted the most by gluten free & allergy friendly lifestyles.



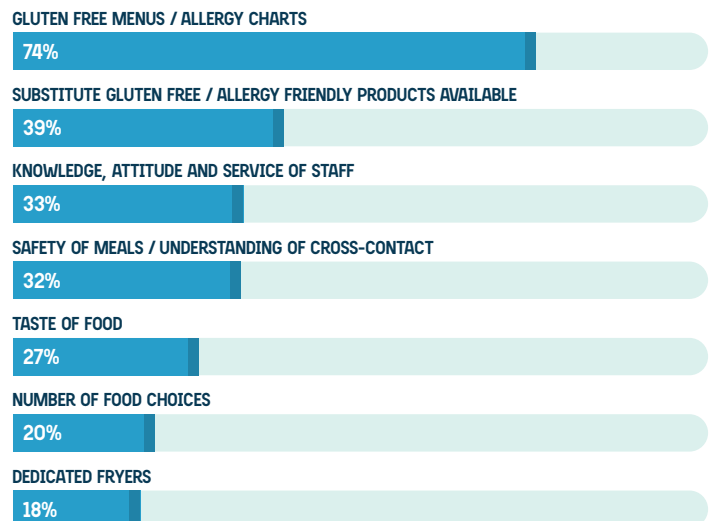
➔ Over the past 10 years, **TASTE** remains the #1 priority for consumers in the US and worldwide when buying gluten free and allergy friendly products.



➔ Over one-half of consumers managing gluten free and allergy friendly lifestyles eat out more now in restaurants on a weekly basis than in 2007.

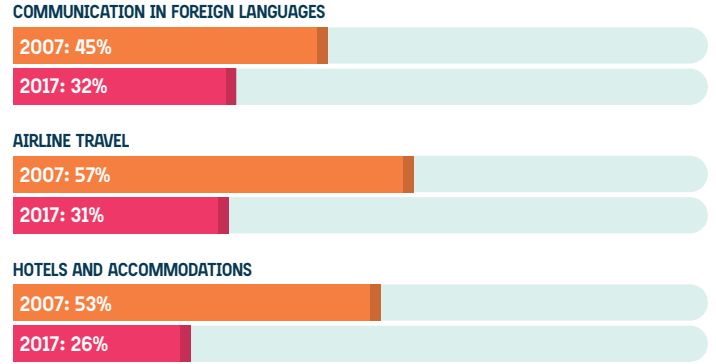
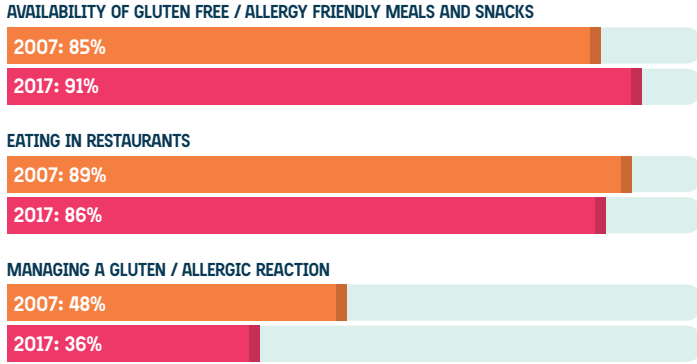


➔ 3 out of 4 consumers managing gluten free and allergy friendly lifestyles prefer the availability of gluten-free menus and/or allergy menu charts when deciding on their restaurant destination.



➔ **Top travel concerns for consumers managing gluten free and allergy friendly lifestyles continue to be the availability of special meals and snacks as well as eating out in restaurants.**

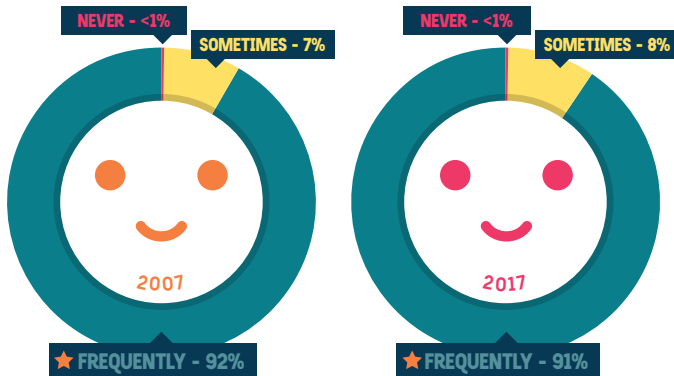
■ 2007: 2,767 Responses ■ 2017: 16,100 Responses



➔ **Based on 10 year research trends, consumers managing gluten free and allergy friendly lifestyles continue to be extremely loyal and discerning customers. Providing safe meals the first time equals loyal repeat customers and increased revenues.**

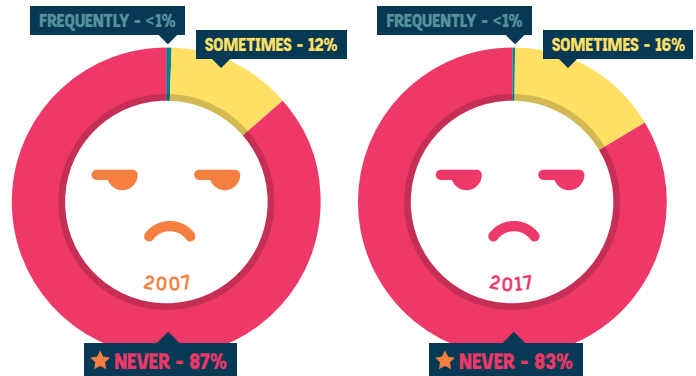
POSITIVE EXPERIENCE

2007: 2,707 Responses 2017: 16,100 Responses



NEGATIVE EXPERIENCE

2007: 2,707 Responses 2017: 16,100 Responses



➔ **Although progress has been made in public awareness, during the past 10 years, there are still additional areas for improvement across the global community.**

Increased training for restaurants, food service and travel providers as well as wider selection and more food choices are the top two priorities in the next 1-2 years for consumers managing gluten free and allergy friendly lifestyles.

