

# Clean Label Research Community Behavior Report: Clean Label and Functional Ingredients



Report Powered By:



**CLEAN LABEL  
ENTHUSIASTS®**

An InsightsNow Community

## Welcome to the Clean Label Enthusiasts® Monthly Report

The free-from food movement is a multi-billion dollar shift in consumer behavior that is impacting companies within the consumer packaged goods industry. To know how to effectively respond to this movement, InsightsNow has launched a long-term research initiative applying behavioral science to generate insights for faster, more informed clean label decisions. Please read on to find the results of our July/August 2019 report: Clean Label Enthusiasts & Functional Ingredients.

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# Clean Label Enthusiasts® & Functional Ingredients

## Overview:

Clean Label **Enthusiasts** (CLE) are a behavioral segment, differentiated by their attitudes and avoidances of products with artificial ingredients and other additives that they believe are unhealthy. They tend to read ingredient labels and avoid brands due to these concerns.

Not only do CLE tend to read labels, but they also exhibit concern about chemicals and avoid "unhealthy" brands. All CLE shoppers state that clean label concerns impact their shopping choices, versus only 22% of Non-CLE shoppers. 76% state that they avoid buying brands to avoid "bad/unhealthy ingredients" versus 22% of Non-CLE.

## Study Details:

In July and August 2019, we conducted 2 waves of an online survey. The first wave consisted of 199 Clean Label Enthusiasts (CLE) and 202 primary shoppers who are not concerned with clean labels (Non-CLE), participants completed a questionnaire that explored which health and wellness benefits matter most to them. In the second wave, 241 CLE completed an Implicit/Explicit Test™ to gauge their perceptions of various functional ingredients.





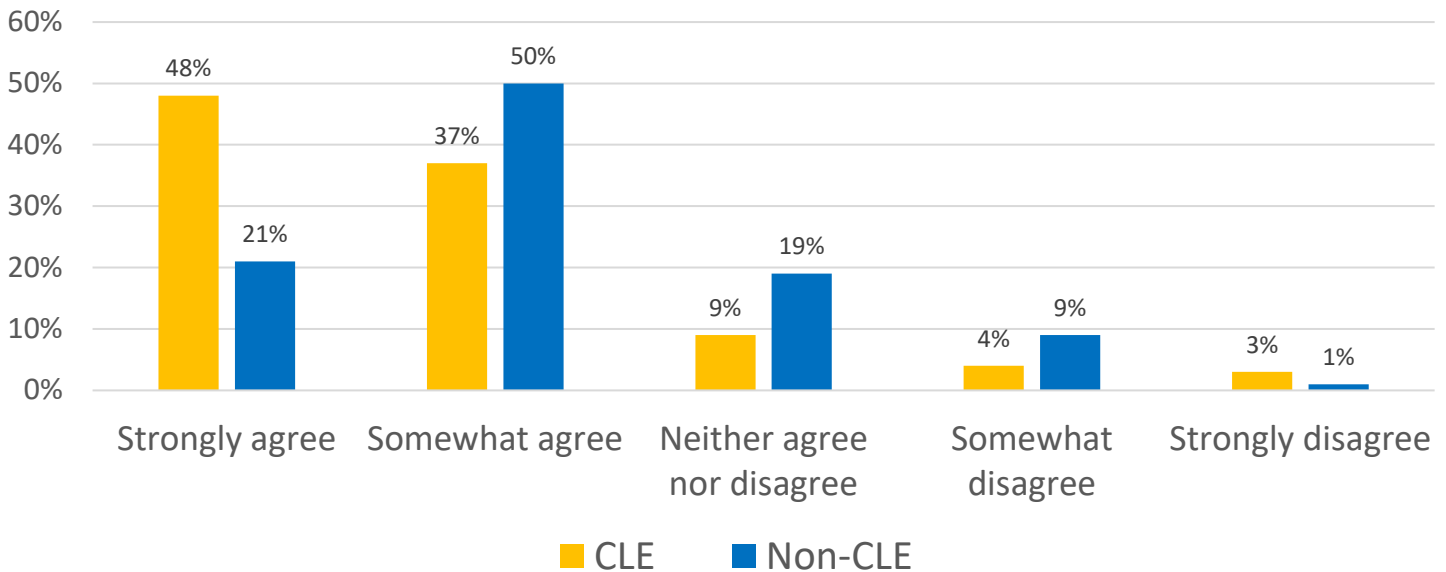
# Summary of What We Learned

- ✓ 48% of Clean Label Enthusiasts® strongly agree with the statement “I am proactive with my health”, compared to only 21% of Non-CLE.
- ✓ 68% of CLE always check the ingredient label to see whether there is an ingredient that supports a product health claim, compared to just 17% of Non-CLE.
- ✓ CLE care much more about the health and wellness benefits provided by the products they consume, as they reported that their purchased products were overall more likely to have more health and wellness benefits (compared to the products that Non-CLE purchase).
- ✓ 56% of CLE get health and wellness benefits from unprocessed foods such as fresh fruit or vegetables, and 47% of CLE also get benefits from naturally sourced supplements.
- ✓ Overall, CLE are fairly accurate in identifying the ingredients that provide specific health and wellness benefits, and can select the ingredients that have anti-inflammatory properties, increase energy, and provide immune support.
- ✓ When they wish to find out whether an ingredient has a health and wellness benefit, CLE tend to do an internet search 48% of the time.



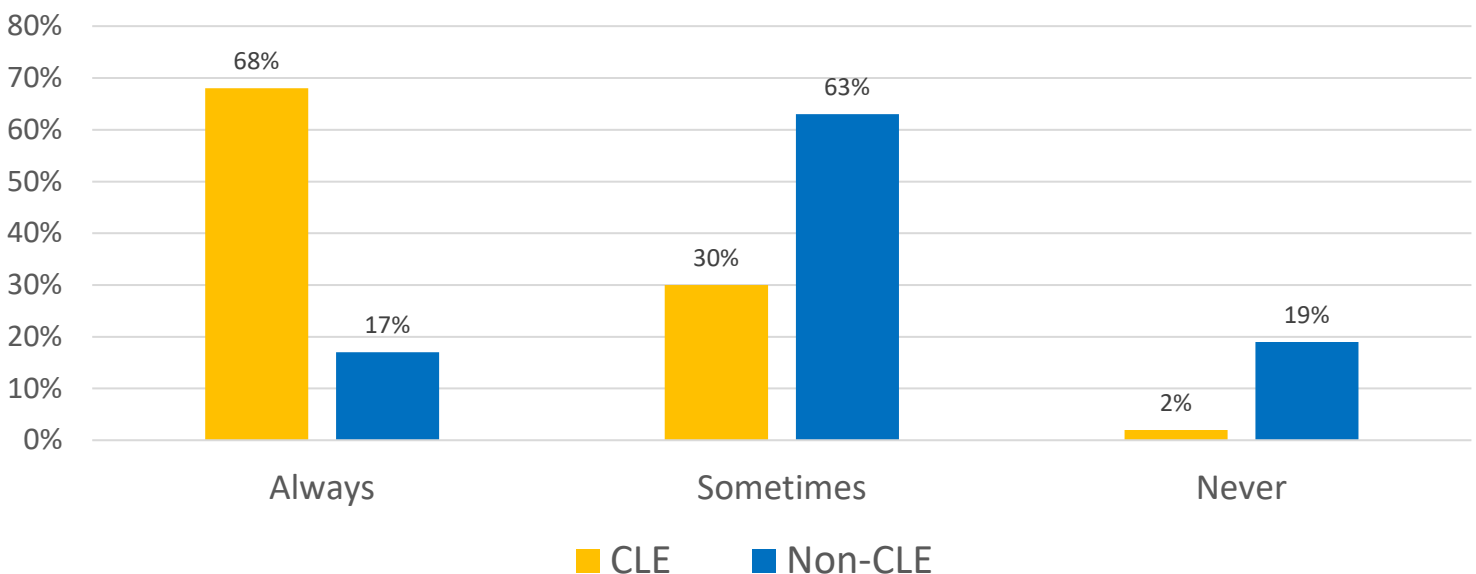
# Health Attitudes & Behaviors

## Proactive with Health



We found that almost half of Clean Label Enthusiasts® strongly agree with the statement “I am proactive with my health”, compared to only 21% of Non-CLE. When they see a claim on a food or beverage package which states that the product has health benefits, 68% of CLE *always* check the ingredient label to see whether there is an ingredient that supports that claim, compared to just 17% of Non-CLE. Consumers will be more proactive with their health and will check ingredient labels to ensure that products actually contain ingredients that support their claims.

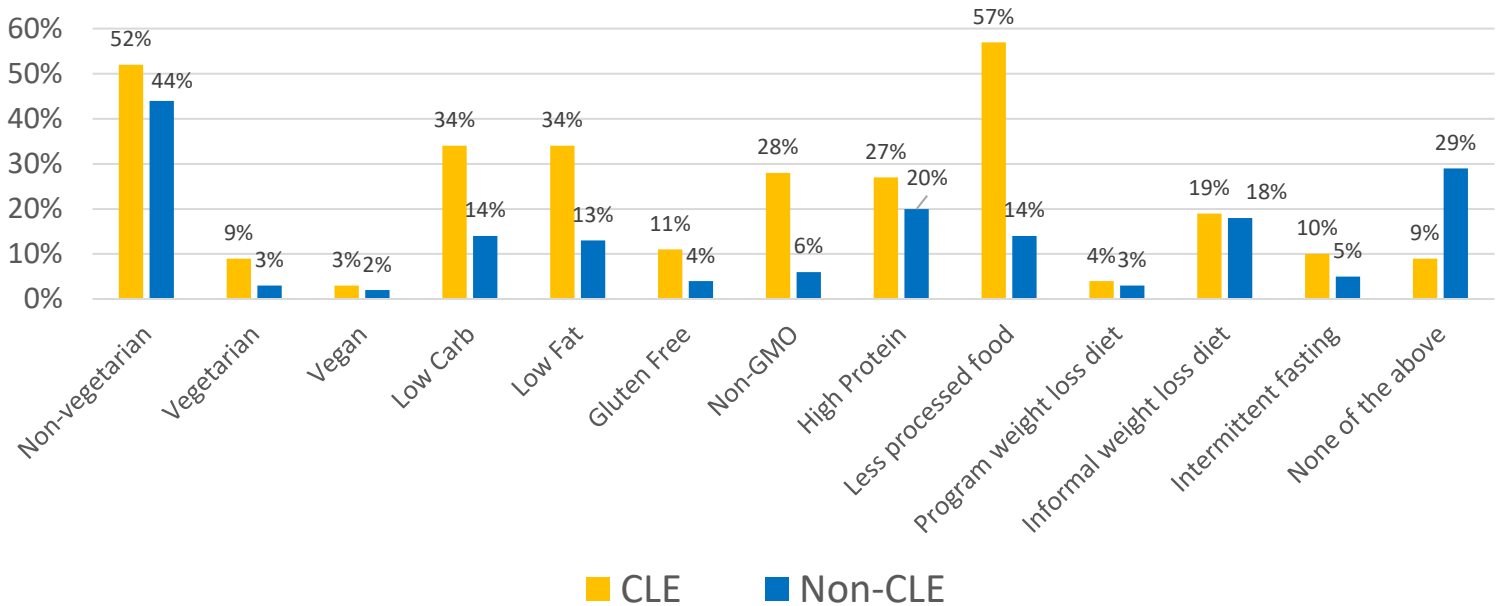
## Health Benefit Ingredient Check





# Diet & Lifestyle

## Lifestyle Diets I Follow

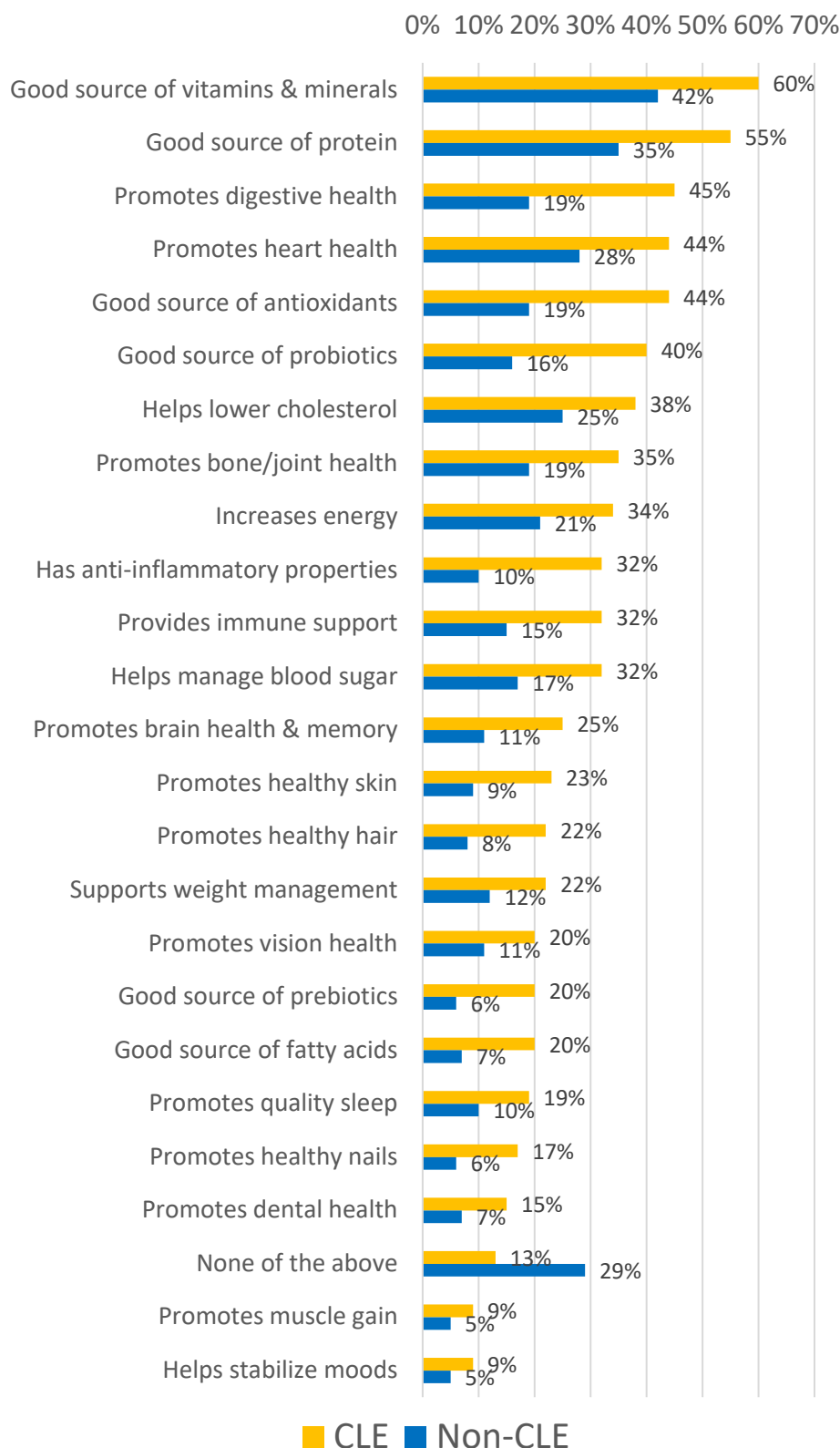


Approximately half of both Clean Label Enthusiasts® and Non-CLE are non-vegetarian, suggesting that meat is still included and accepted as a lifestyle eating choice. More than half of CLE say that they follow a lifestyle diet of eating less processed food, compared to only 14% of Non-CLE. CLE are also more likely to follow low carb, low fat, and non-GMO lifestyle diets (compared to Non-CLE). These results suggest that lifestyle diets will grow in popularity in the future.



# Health & Wellness Benefits

## Health & Wellness Benefits Provided By Purchased Products



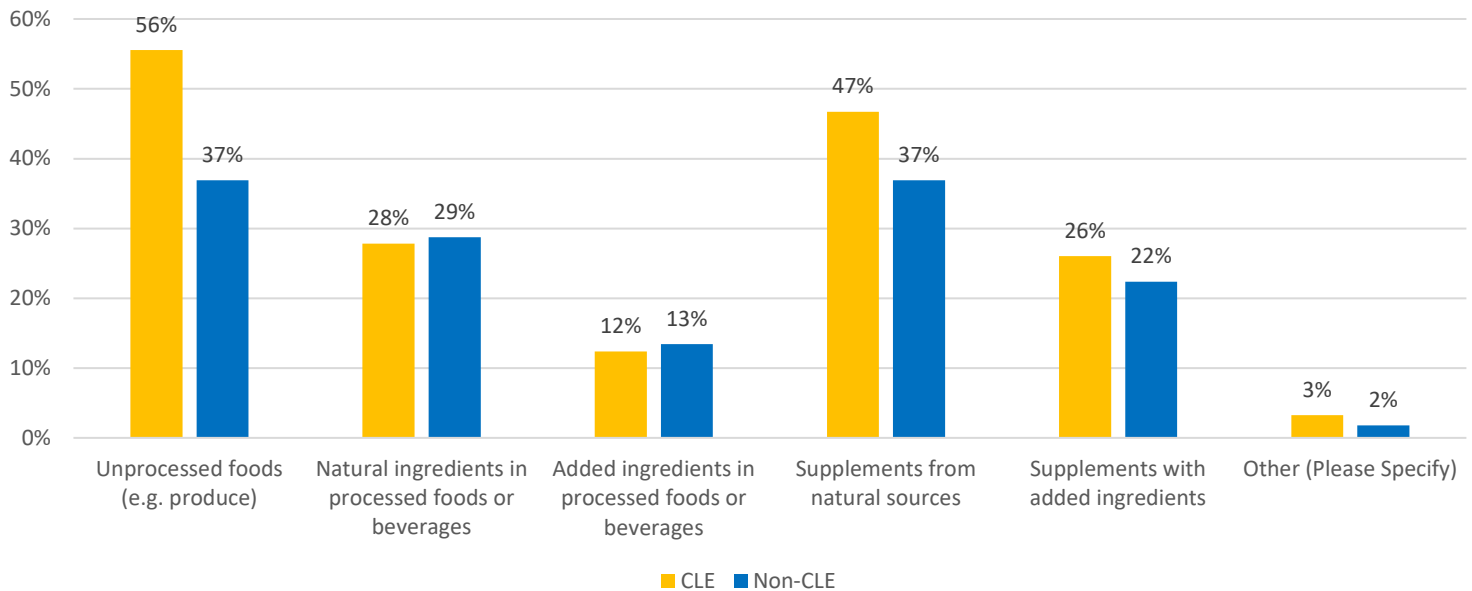
Clean Label Enthusiasts® care much more about the health and wellness benefits provided by the products they consume. They reported that their purchased products were overall more likely to have more health and wellness benefits (compared to the products that Non-CLE purchase).

CLE and Non-CLE were more interested in benefits that were more all-encompassing such as "good source of vitamins & minerals" and "good source of protein" than specific areas such as "promotes dental health."

These findings suggest that consumers will be very interested in the benefits studied. Food, beverage, and supplement companies should focus on ensuring that their products have these particular benefits and should consider adding claims to their product packaging that make the health and wellness benefits of their products very clear.

# Sources of Benefits

Sources of Health and Wellness Benefits



Our study found that over half of Clean Label Enthusiasts® get health and wellness benefits from unprocessed foods such as fresh fruit or vegetables, and almost half of CLE also get benefits from naturally sourced supplements. On the other hand, a very low percentage of both CLE and Non-CLE get their health and wellness benefits from added ingredients in processed foods or beverages. These findings suggest that consumers of the future will seek out unprocessed foods, and supplements from natural sources, as much as they can.





# Implicit/Explicit Test™ Methodology

In order to measure CLE consumers' reactions to various types of ingredients and functional benefits, we conducted an Implicit/Explicit Test™. In the test, we put respondents into the context of the personal health and wellness benefits provided by the food, beverages and supplements that they purchase for themselves or family members.

When you see a statement on a food or beverage package which states that the product **promotes heart health**, does this ingredient support that claim?

**APPLE**

YES

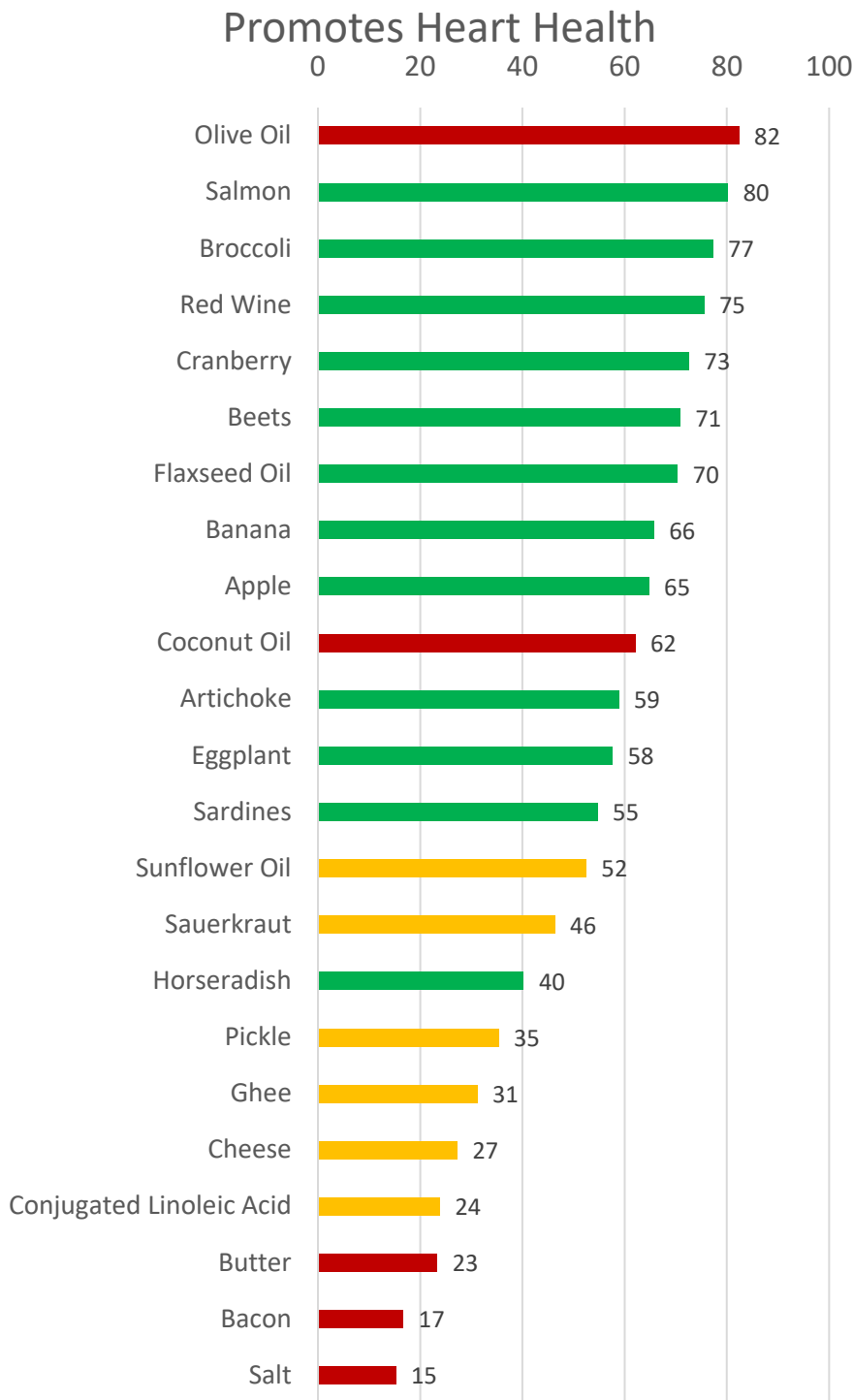
NO

When they saw each ingredient and benefit, they had to select "YES" or "NO" as quickly as possible; their choice and reaction time were used to calculate an Implicit/Explicit Test™ score for each ingredient and benefit combination. Higher Implicit/Explicit Test™ scores indicate that participants were more likely to implicitly accept an ingredient and benefit combination, while lower scores indicate that participants were more likely to implicitly reject it.

Benefit Areas

| Promotes Heart Health    | Promotes Bone/Joint Health | Promotes Digestive Health | Increases Energy           | Has Anti-Inflammatory Properties | Provides Immune Support |
|--------------------------|----------------------------|---------------------------|----------------------------|----------------------------------|-------------------------|
| Apple                    | Apple                      | Apple                     | Banana                     | Apple                            | Bell Pepper             |
| Artichoke                | Bok Choy                   | Beans                     | Beef                       | Avocado                          | Brazil Nut              |
| Bacon                    | Broccoli                   | Bok Choy                  | Beets                      | Cherry                           | Broccoli                |
| Banana                   | Carrot                     | Broccoli                  | Cayenne Pepper             | Chili Pepper                     | Cayenne Pepper          |
| Beets                    | Collard Greens             | Brussel Sprouts           | Cocoa                      | Cloves                           | Cinnamon                |
| Broccoli                 | Fig                        | Cabbage                   | Coffee                     | Cocoa                            | Cloves                  |
| Butter                   | Grapefruit                 | Carrageenan               | Dark Chocolate             | Eggplant                         | Echinacea               |
| Cheese                   | Kale                       | Celery                    | Eleutherococcus Senticosus | Flaxseed                         | Elderberry              |
| Coconut Oil              | Milk                       | Chickpeas                 | Ginkgo                     | Garlic                           | Garlic                  |
| Conjugated Linoleic Acid | Mung Beans                 | Collard Greens            | Ginseng                    | Ginger                           | Ginger                  |
| Cranberry                | Nuts                       | Flaxseed                  | Goji Berry                 | Grapes                           | Honey                   |
| Eggplant                 | Parsley                    | Garlic                    | Green Tea                  | Green Tea                        | Kiwi                    |
| Flaxseed Oil             | Phosphorus                 | Ginger                    | Nuts                       | High Fructose Corn Syrup         | Licorice                |
| Ghee                     | Protein Hydrolysate        | Green Beans               | Omega 6                    | Melatonin                        | Monosodium Glutamate    |
| Horseradish              | Prunes                     | Horseradish               | Oyster                     | Milk                             | Mushroom                |
| Olive Oil                | Salmon                     | Mint                      | Pasta                      | Monosodium Glutamate             | Orange                  |
| Pickle                   | Salt                       | Miso                      | Pickle                     | Mushroom                         | Orange Juice            |
| Red Wine                 | Sesame Seeds               | Oats                      | Raspberry                  | Omega 3                          | Oregano                 |
| Salmon                   | Soda                       | Sorbitol                  | Rice Protein               | Omega 6                          | Oyster                  |
| Salt                     | Soy                        | Spinach                   | Turkey                     | Rosemary Extract                 | Papaya                  |
| Sardines                 | Sweet Potato               | Sweet Potato              | Yerba Mate                 | Saffron                          | Rosemary                |
| Sauerkraut               | Wheat Bran                 | Tofu                      |                            | Spinach                          | Sugar                   |
| Sunflower Oil            |                            | Yogurt                    |                            | Squash                           | Thyme                   |
|                          |                            |                           |                            | Tomatoes                         | Turmeric                |

# Implicit/Explicit Test™ Results - Heart Health



**Green** = scientific evidence of benefit

**Orange** = little/mixed scientific evidence for

**Red** = no scientific evidence for

The results of our Implicit/Explicit Test™ showed that Clean Label Enthusiasts® hold misconceptions about olive oil and coconut oil: they believe that both ingredients promote heart health, although neither of those ingredients actually have that benefit.

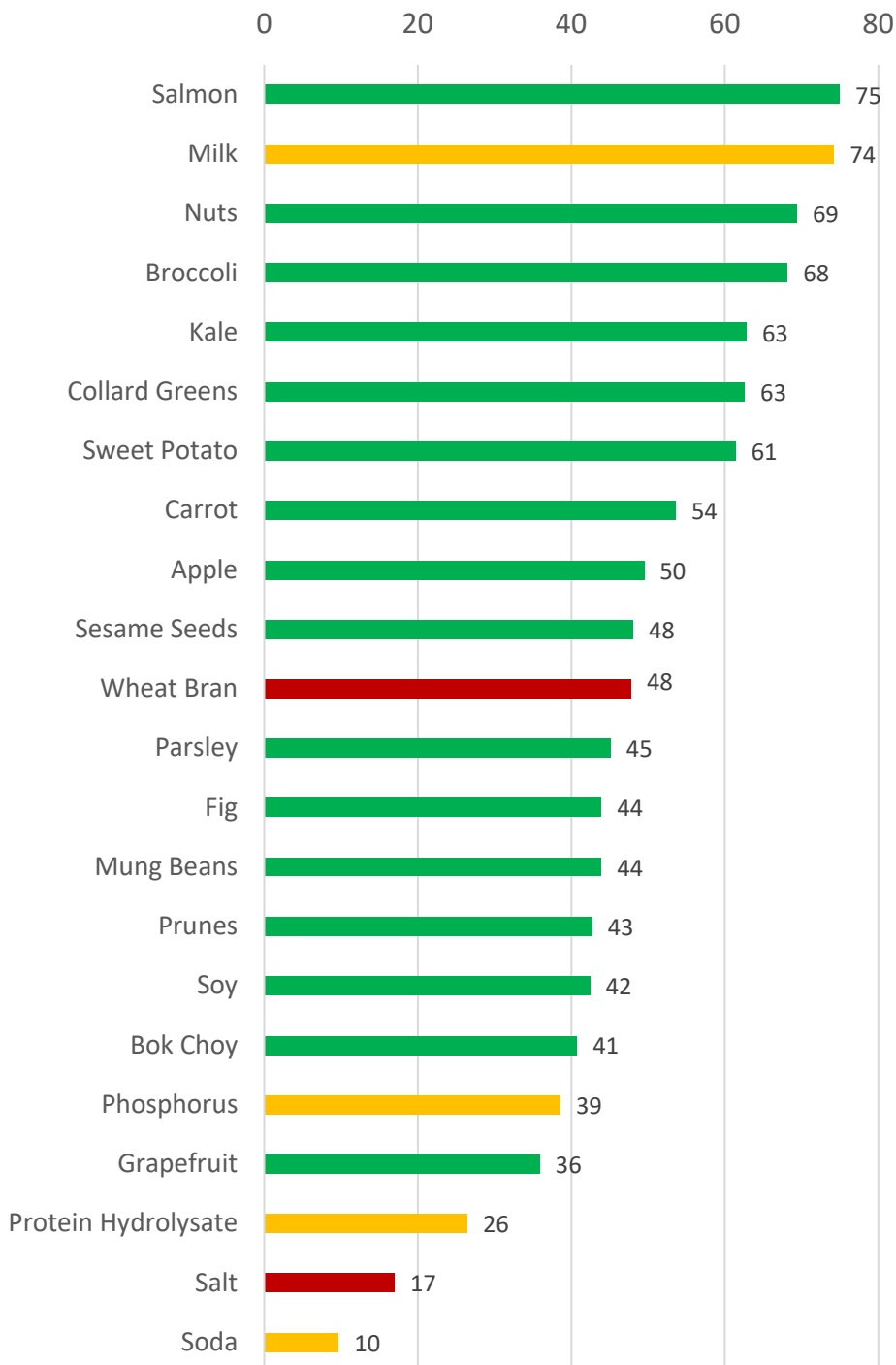
Interestingly, however, CLE had very accurate perceptions about the majority of heart-healthy ingredients, such as salmon, broccoli, red wine, and cranberries. They also correctly identified ingredients that do not promote heart health, such as butter, bacon, and salt.

These results suggest that while CLE may be susceptible to some common misconceptions about ingredients, they are nonetheless savvy and forward-thinking consumers who are generally well-informed about the science of nutrition.



# Implicit/Explicit Test <sup>TM</sup> Results - Bone/Joint Health

## Promotes Bone/Joint Health



**Green** = scientific evidence of benefit

**Orange** = little/mixed scientific evidence for

**Red** = no scientific evidence for

Our research found that Clean Label Enthusiasts® were susceptible to common misconceptions about milk and wheat bran. Both ingredients may actually cause higher fracture rates, and therefore do not promote bone or joint health.

However, CLE had a good understanding of other ingredients that promote bone and joint health, such as salmon, nuts, broccoli, and kale. CLE also understood that ingredients such as salt and soda are not good for bone and joint health.

These findings demonstrate that although CLE have some misconceptions about ingredients such as milk, overall, CLE have a fairly good grasp of which ingredients actually contribute to bone and joint health.

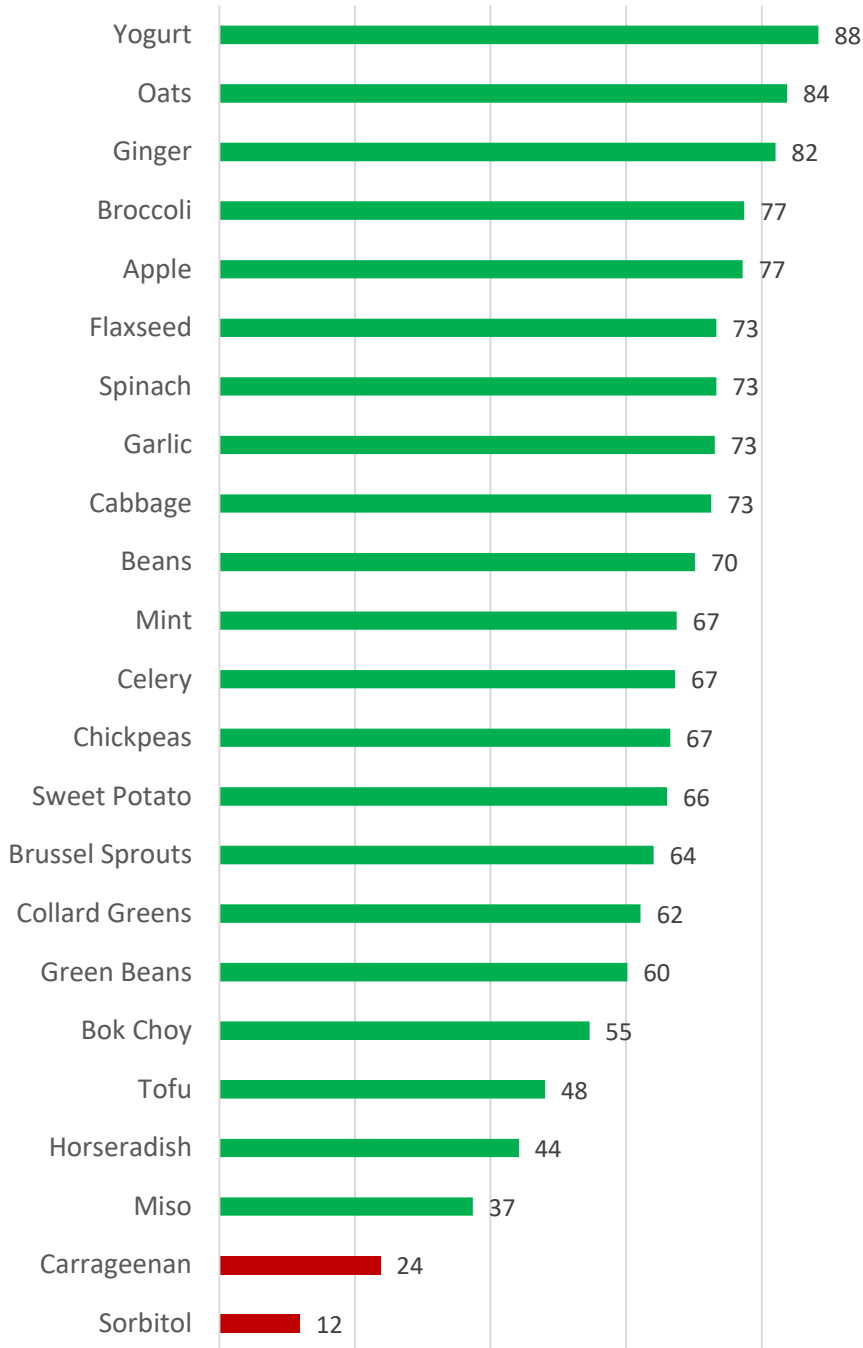




# Implicit/Explicit Test <sup>TM</sup> Results - Digestive Health

## Promotes Digestive Health

0 20 40 60 80 100



**Green** = scientific evidence of benefit

**Orange** = little/mixed scientific evidence for

**Red** = no scientific evidence for

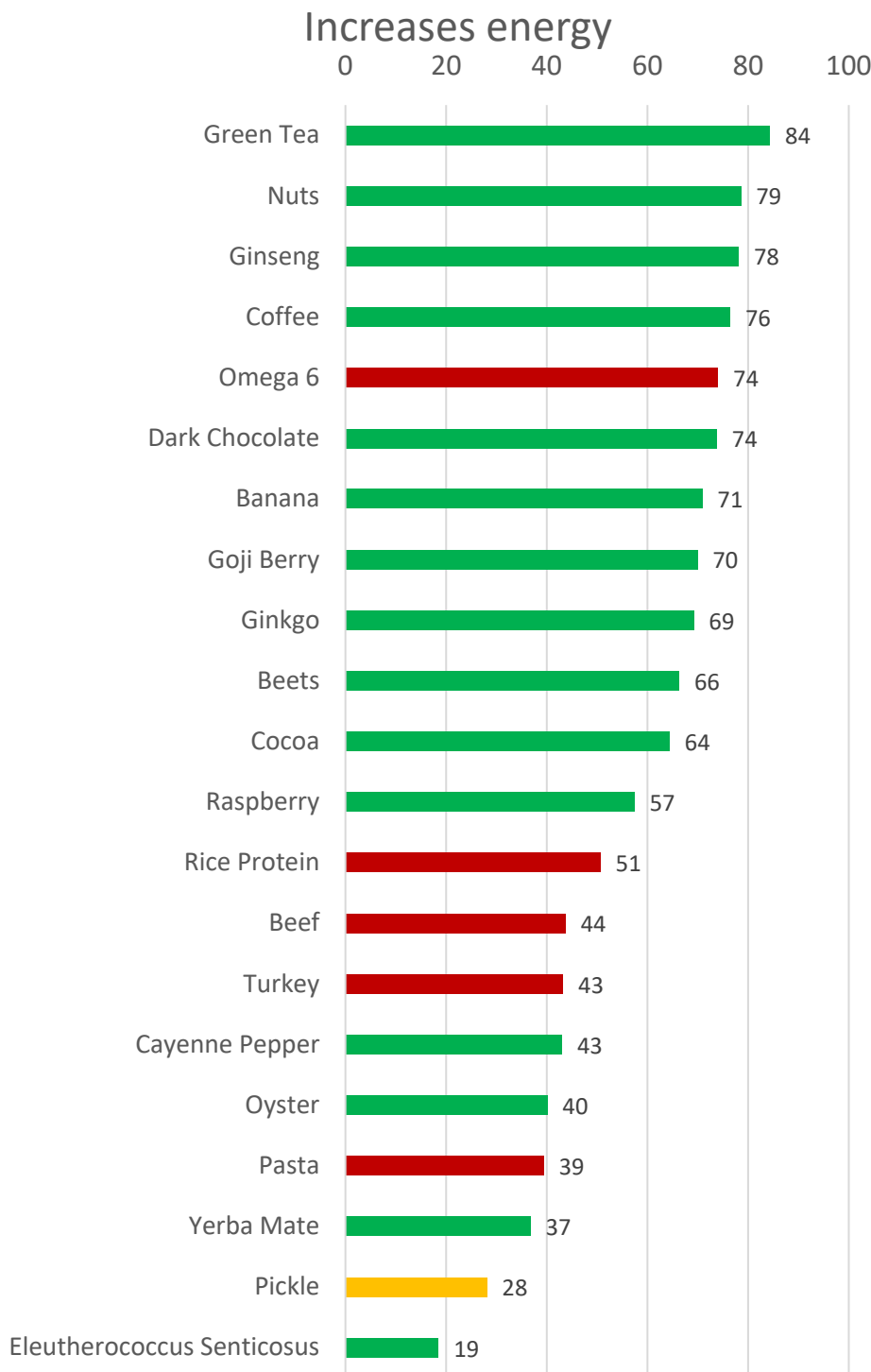
Our study found Clean Label Enthusiasts<sup>®</sup> know their fiber and probiotic ingredient benefits. CLE were able to correctly identify many ingredients that promote digestive health, such as yogurt, oats, ginger, and broccoli.

CLE also accurately pinpointed ingredients that are bad for digestive health, such as carrageenan and sorbitol.

These results show that CLE are well-educated about digestive health.



# Implicit/Explicit Test <sup>TM</sup> Results - Energy



**Green** = scientific evidence of benefit

**Orange** = little/mixed scientific evidence for

**Red** = no scientific evidence for

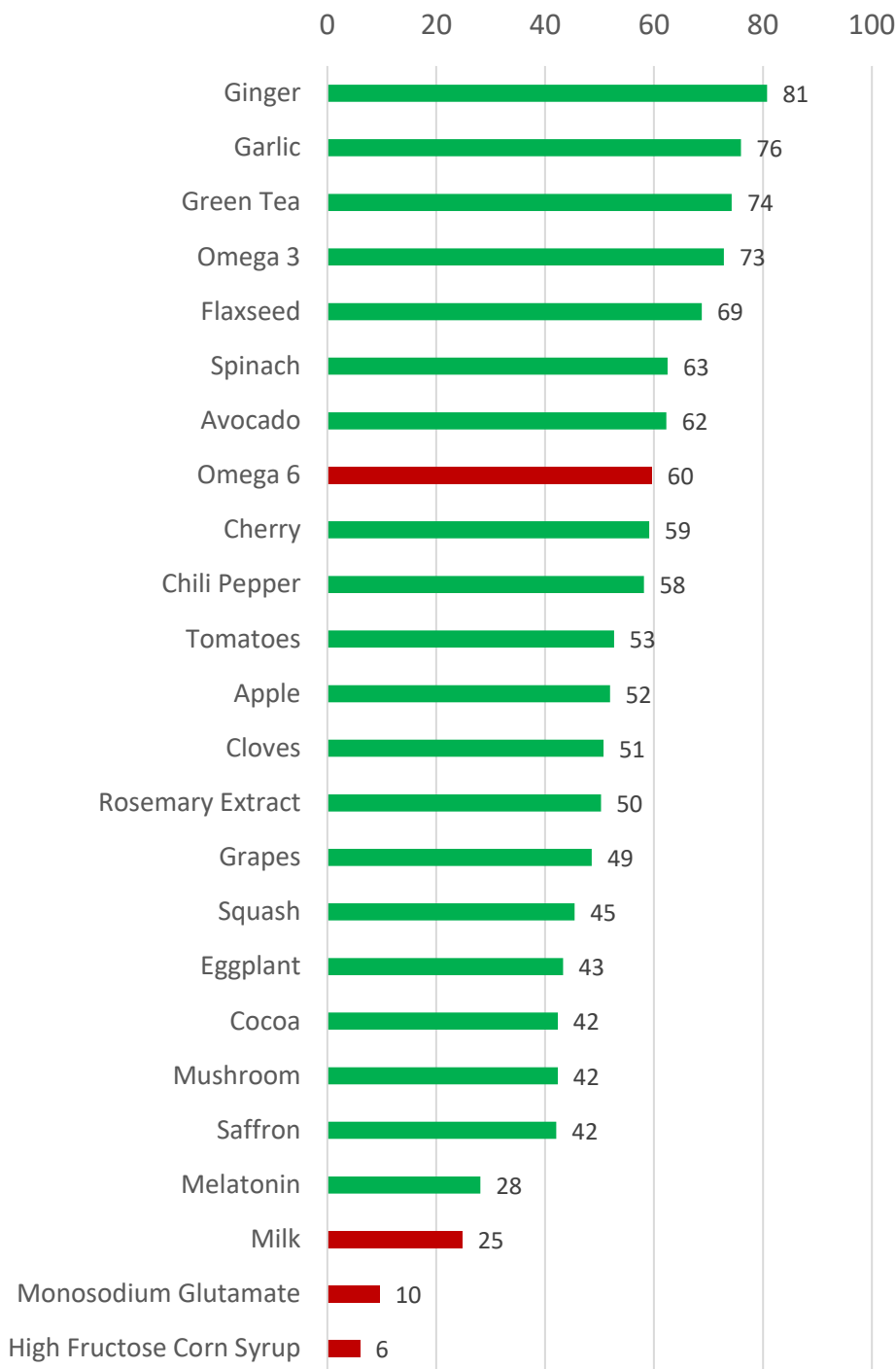
Our study found that Clean Label Enthusiasts® believed that Omega 6 increases energy, even though it actually doesn't have that effect. CLE also did not recognize that yerba mate does increase energy.

These results suggest that ingredient companies should make an effort to publicize the health and wellness benefits of some ingredients, such as yerba mate. CLE are well-informed about nutrition, so if they are not aware of the health benefits of certain ingredients, this implies that the benefits of those ingredients are not well-understood in general.



# Implicit/Explicit Test <sup>TM</sup> Results - Anti-Inflammatory

## Has Anti-Inflammatory Properties



**Green** = scientific evidence of benefit  
**Orange** = little/mixed scientific evidence for  
**Red** = no scientific evidence for

Our research found that Clean Label Enthusiasts® correctly ascertained that ginger, garlic, green tea, and omega 3 have very good anti-inflammatory properties.

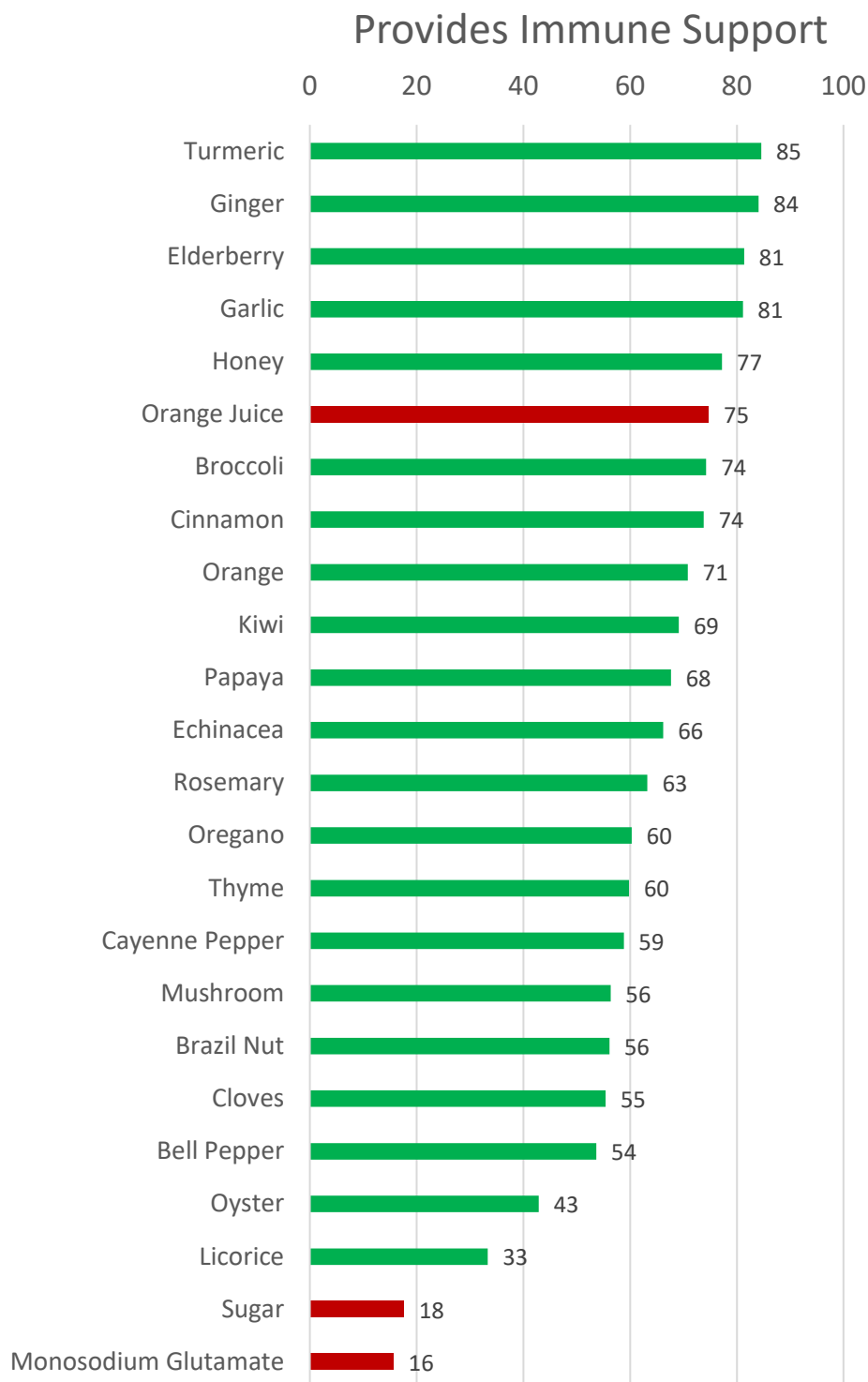
CLE correctly noted that milk, monosodium glutamate (MSG) and high fructose corn syrup did not have anti-inflammatory properties. However, CLE did hold some misconceptions about omega 6, believing it to have anti-inflammatory properties even though it does not actually have that benefit.

These findings provide further support for the notion that overall, CLE are knowledgeable consumers who understand the functional benefits of ingredients.





# Implicit/Explicit Test <sup>TM</sup> Results - Immune Support



Our study found that Clean Label Enthusiasts® were accurately able to identify turmeric, ginger, elderberry, and garlic as providing immune support.

CLE also understood that sugar and monosodium glutamate (MSG) were not beneficial for immune support. However, they mistakenly believed that orange juice was good for immune support.

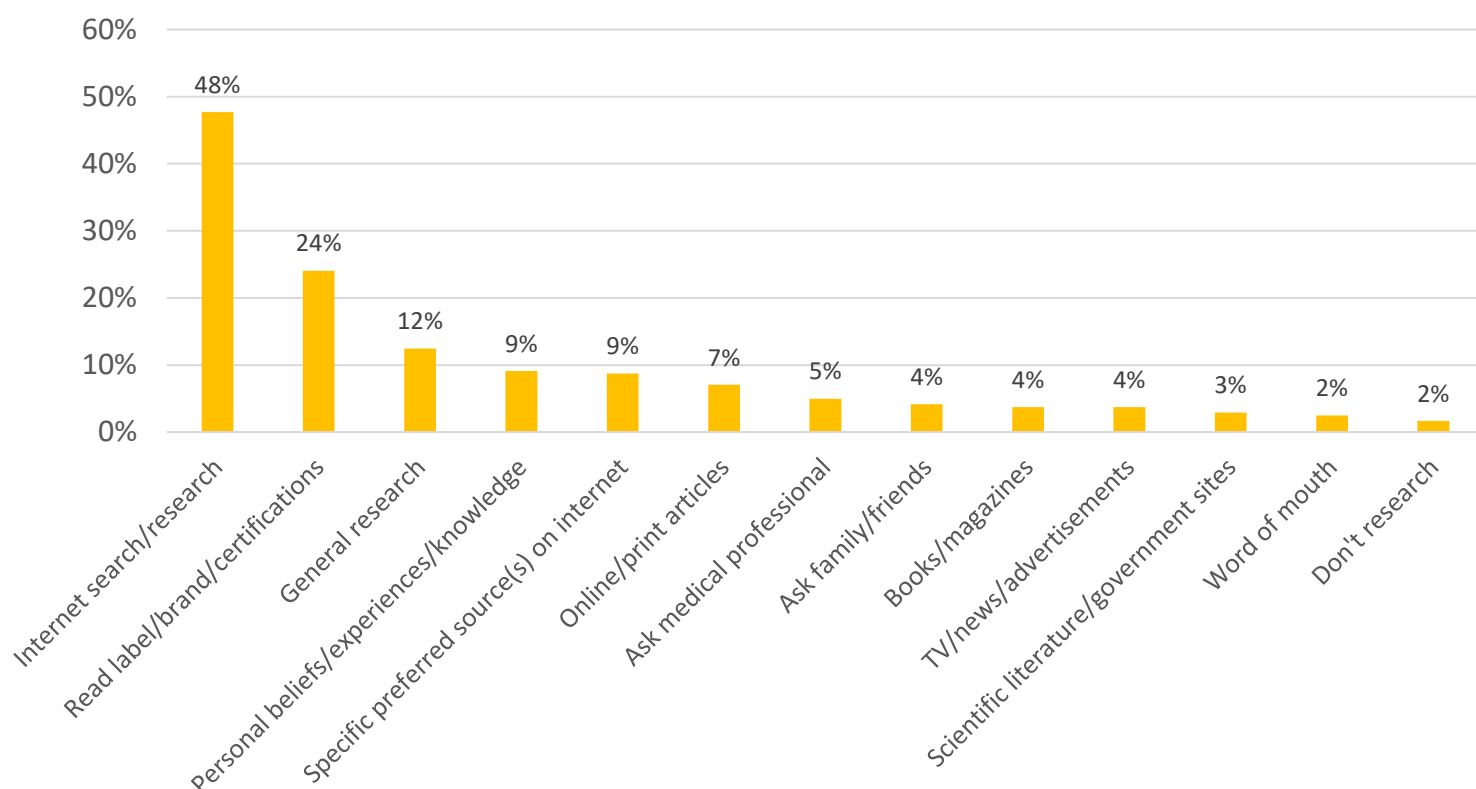
These findings show that while CLE are generally very well-educated about the ingredients that have specific functional benefits, such as immune support, they are nonetheless susceptible to some misconceptions. These results imply that many consumers may fall prey to the same misconceptions.



**Green** = scientific evidence of benefit  
**Orange** = little/mixed scientific evidence for  
**Red** = no scientific evidence for

# How do you find out whether an ingredient has a personal health and wellness benefit?

How I Find Out Whether Ingredient Has Benefit



When they wish to find out whether an ingredient has a health and wellness benefit, Clean Label Enthusiasts® tend to do an internet search 48% of the time. Besides an internet search, the most common way for CLE to find out whether an ingredient has a health and wellness benefit is to read the label and/or any certifications it has. Only 2% of CLE don't tend to do any research about whether an ingredient has a particular benefit. These results are important because they suggest that food and ingredient companies should strive to be aware of the information that is widely disseminated online about their products, as such information is likely to influence consumers' perceptions.



# How do you find out whether an ingredient has a personal health and wellness benefit?







## *About Us*

### **InsightsNow and the Clean Label Enthusiasts® Community**

InsightsNow has a special focus on behavioral marketing research. While we work with a whole spectrum of product types, we especially want to help guide companies trying to engage consumers with healthy living products and practices. Our clients create strategies based on deeper, actionable insights from engaging our custom CLE community and unique behavioral frameworks for interpreting consumer responses.

Clients benefit from work with InsightsNow's community of Clean Label **Enthusiasts** by gaining new insights on CLE's attitudes, behaviors, or ingredients they avoid. These consumers place a high priority on aligning their purchases with values of personal and planetary health. They are especially aware of ingredients and conscientiously read labels. Thus, companies can better design product attributes that engage or reduce aversion in this consumer segment.

We want to partner with clients in optimizing innovation and marketing so they can meet their customer's needs with the best product for their category and authenticity in their messaging.

Please contact us for more information about this study or to inquire about future research.

Thank you,  
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