

# Clean Label Research Community Behavior Report: Clean Label Lifestyle Diet Trends



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**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 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 January 2019 Community Behavioral Report focused on Clean Label Enthusiasts Lifestyles and Diets.

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## Behavioral Study Details: *Clean Label Enthusiast® Lifestyle Diet and Diet Programs*

201 members of the InsightsNow Clean Label Enthusiasts® community completed an online questionnaire regarding lifestyle and diet choice in December 2018.

Clean Label Enthusiasts (CLE) are a behavioral segment of US primary household shoppers, differentiated by their attitudes and avoidances of products with artificial ingredients and other additives that they believe are unhealthy. At 27% of U.S. primary shoppers, CLE are lead indicators of consumer behavior. They are underlying much of the CPG market change that is impacting these industries.

CLE tend to read labels to a greater extent than other primary shoppers. They take action on what they read, avoiding brands they view as “unhealthy.” 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.

Members of this community were asked questions about their familiarity with and participation in the following popular lifestyle diet and weight loss diet programs.

### Lifestyle Diet

- Vegetarian
- Vegan
- Lacto Vegetarian
- Ovo Vegetarian
- Lacto-ovo Vegetarian
- Pollotarian
- Pescatarian
- Flexitarian
- Low Carb
- Low Fat
- Gluten Free
- Non-GMO
- Intermittent Fasting
- High Protein

### Diet Program

- Mediterranean Diet
- Paleo Diet
- Weight Watchers
- Ketogenic Diet
- DASH Diet
- Volumetrics
- Whole 30 Diet
- Zone Diet
- TLC Diet
- Ornish Diet
- MIND Diet
- South Beach
- Atkins
- Nutrisystem
- Slim Fast
- Jenny Craig

## *Overview of Behavioral Insights: Clean Label Enthusiasts® Lifestyle Diet and Diet Programs*

CLE are great lead indicators for understanding clean label Lifestyle Diet and weight loss Dieting Program trends. 67% of CLE are currently participating in a Lifestyle Diet compared to only 17% for a Diet Program. This difference is part of a trend to Lifestyle Diets over Diet programs as 66% of CLE have tried a Lifestyle Diet in the past compared to 55% having tried a traditional Diet Program.

Underlying this trend to Lifestyle Diets over Dieting Programs are implicit reactions congruent with the new trust economy. Non-GMO – signaling small (vs big) agriculture and food safety - is on the increase with 35% currently participating and another 17% having tried. In comparison, weight loss lifestyles such as Low Carb are declining with 20% CLE trying vs the 32% having tried in the past. As previously reported in CLE Behavioral Reports, Gluten Free is less popular with CLE as only 17% are currently adhering to a Gluten Free diet compared to 18% having tried in the past.

Currently 20% of CLE are participating in one of several plant-based (vegetarian) diets such as Vegetarian, Vegan, Lacto-Vegetarian, Ovo-Vegetarian and Lacto-Ovo-Vegetarian. However, this is also down from 64% participating in one of several vegetarian diets in the past.

In comparison, a high percentage of CLE are currently participating or have tried some of the newer popular Diet Programs such as Mediterranean (16%), Paleo (11%) and Ketogenic (11%). CLE are also very familiar with traditional and newly popular Lifestyle Diet and Diet Programs. This includes familiarity with leading edge dieting plans such as Zone 30 (33%) and Zone Diets (37%).

Among traditional Diet Programs, Weight Watchers, Slim Fast and Atkins have been with most popular with CLE with 23%, 24% and 27%, respectively, having tried. Weight Watchers leads CLE Diet Programs with 5% currently participating, while only 2% are trying either Slim Fast or Atkins. This may be a result of Weight Watchers changing its name in 2018 to WW and starting a move to a clean label. Other lifestyle diet plans such as Jenny Craig, South Beach and Nutrisystem are less popular with CLE and have yet to promote their products or recommendations as clean label.



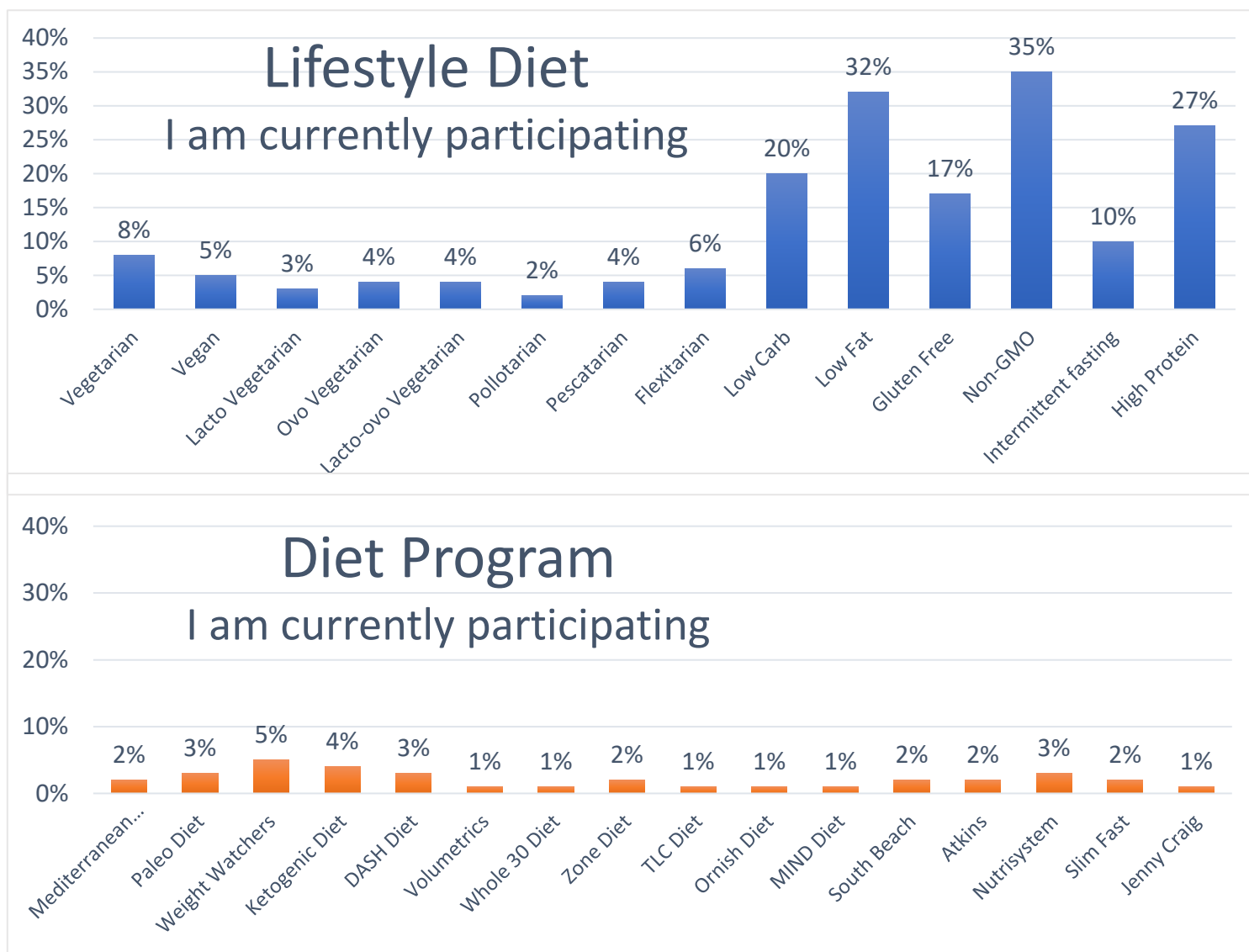
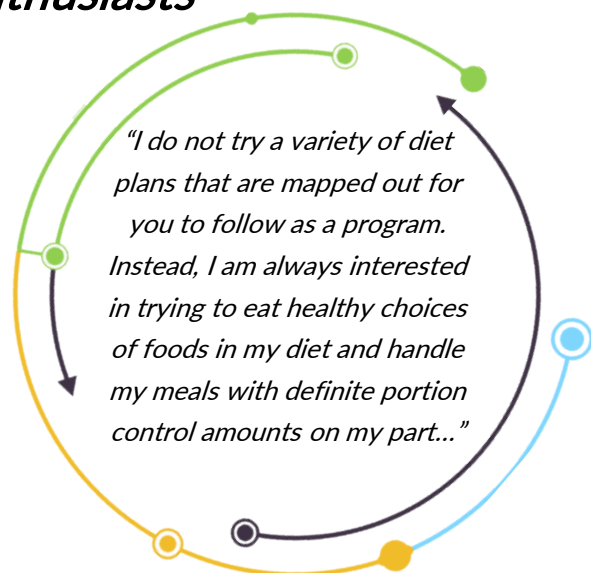
# Lifestyle and Diets within the Clean Label Enthusiasts®

## Current Diet Participation

Clean Label Enthusiasts tend to follow lifestyle diets more so than weight loss diet plans.

35% of CLE members follow a non-GMO life style diet. This was followed closely by Low Fat (32%) and High Protein (27%).

The percentage of CLE participating in specific diet plans was no more than 5% for any one plan. Weight Watchers was the highest of the weight loss diets currently being tried.



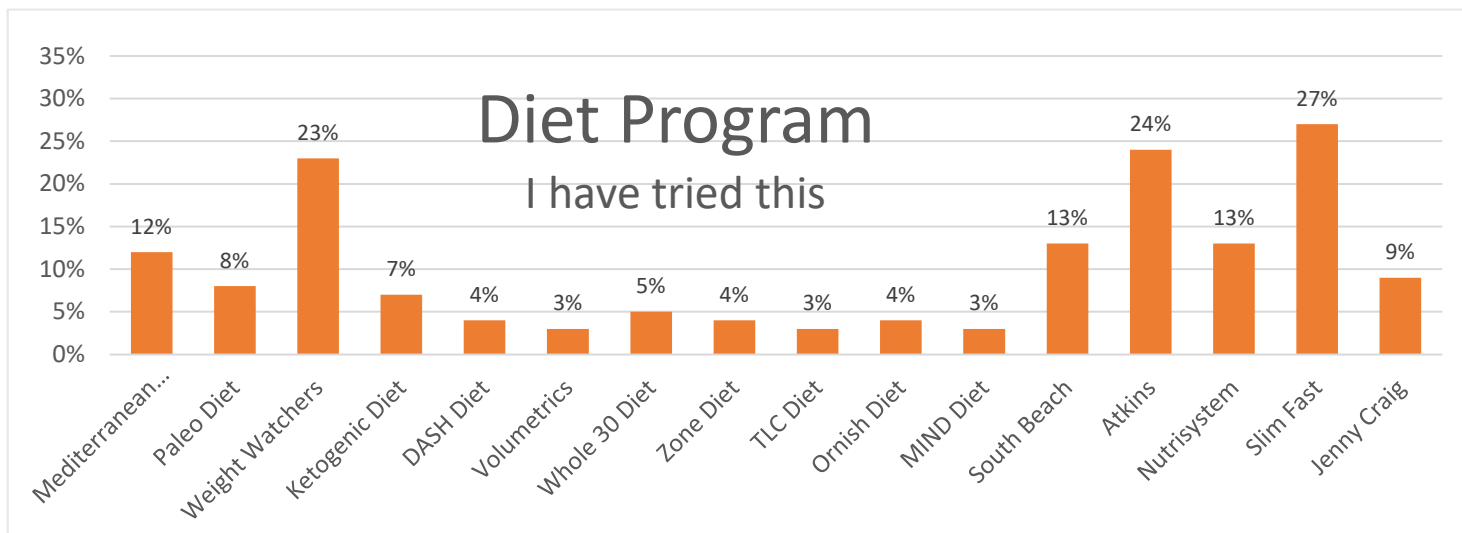
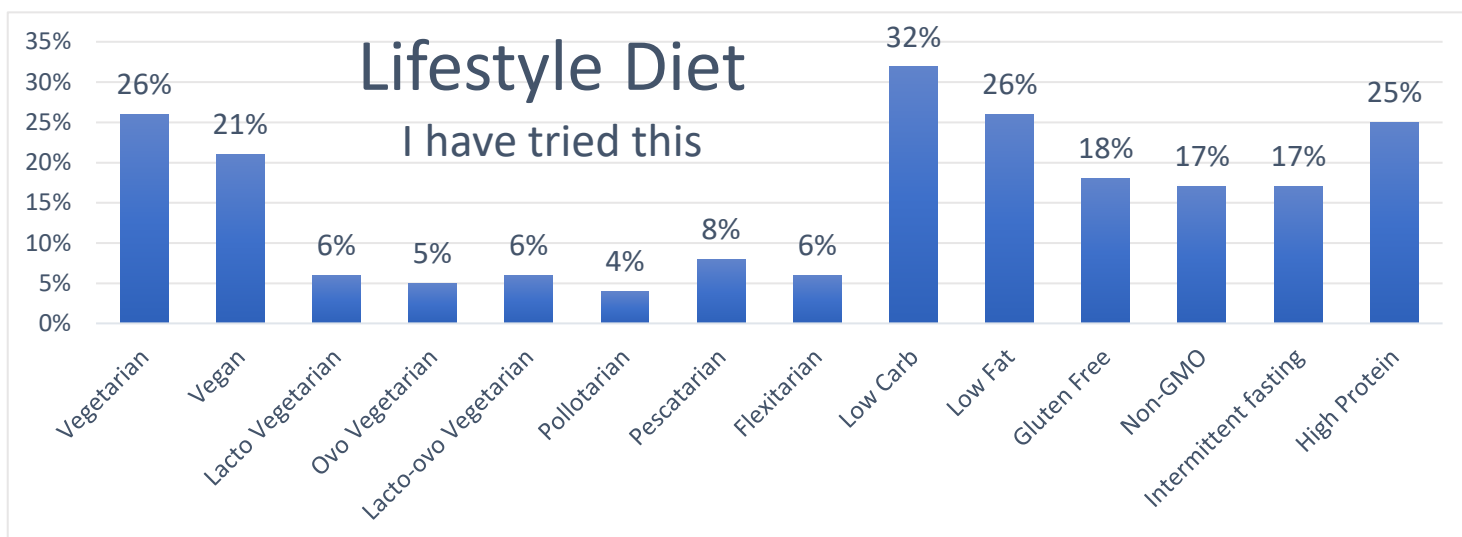
## Lifestyle and Diets within the Clean Label Enthusiasts®

### Dieting trends and tryouts among CLE

Clean Label Enthusiasts have tried various lifestyle and weight loss diet plans. Low Carb eating has been the most popular lifestyle diet with 52% having tried or currently participating. Also popular as tried or currently participating are Low Fat (58%), High Protein (52%), Non-GMO (52%) and Vegetarian (34%). However, comparing current trying to past have tried, Low Carb and Vegetarian diets are on the decline and Non-GMO on the increase.



Weight Watchers is on the increase with 23% having tried and another 5% currently participating. Whereas, Slim Fast was the most tried (27%) followed by Atkins (24%), only 2% of CLE are currently participating.

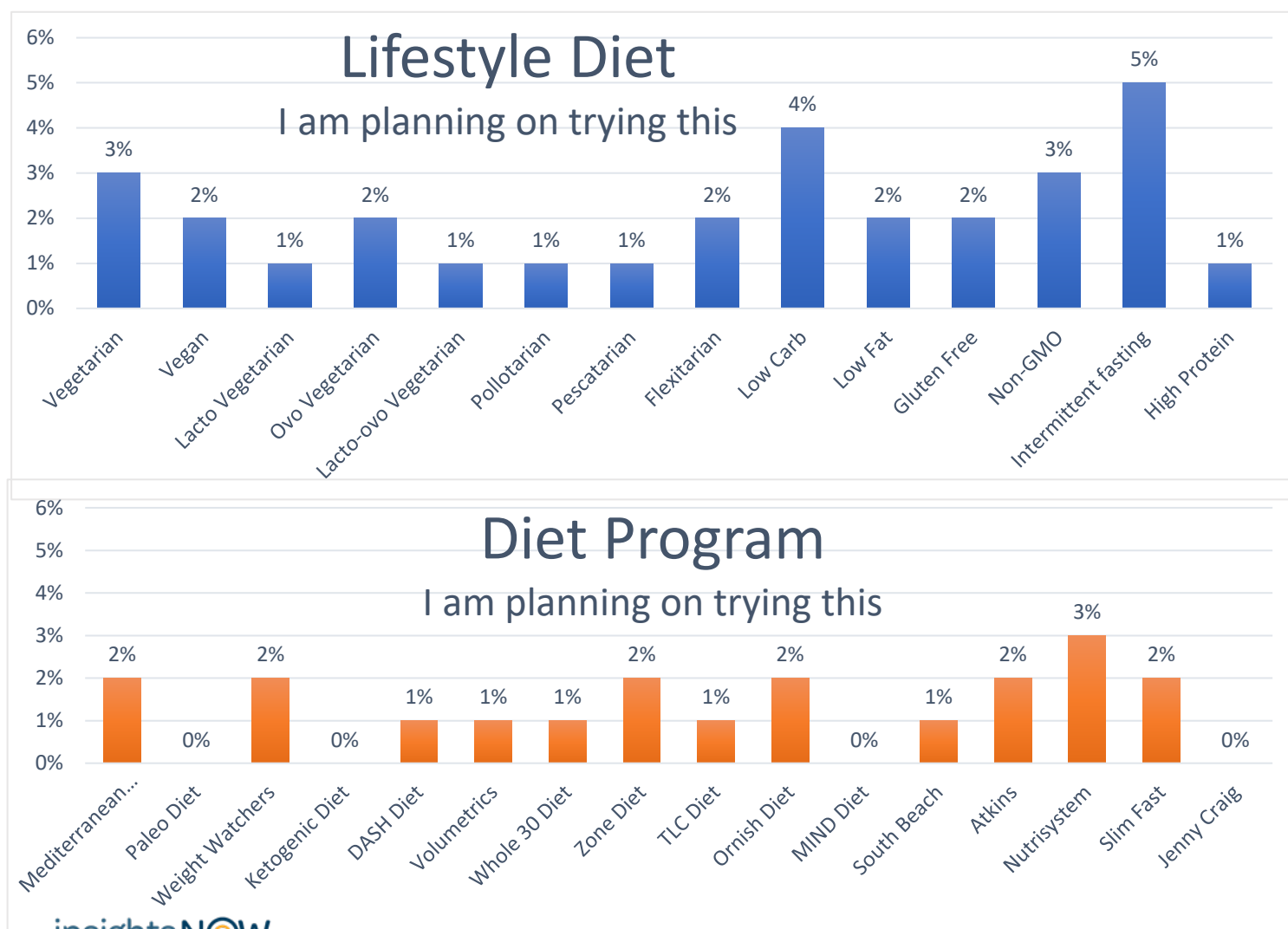


## Lifestyle and Diets within the Clean Label Enthusiasts®

### Planned Diet Participation

Intermittent fasting (5%) and Low Carb eating (4%) were lifestyles that CLE planned to adopt most in the future. This indicates that CLE members view these options as short term, intermittent lifestyle choices to achieve specific short-term health and diet goals.

16% of CLE had tried, were trying or planned to try a Mediterranean Diet. This was followed by Paleo and Ketogenic (11% tried or trying each) with none expressing a plan to try in the future. This shows that CLE have a good mix of lead adopters for new popular life style diets such as Mediterranean Diet.



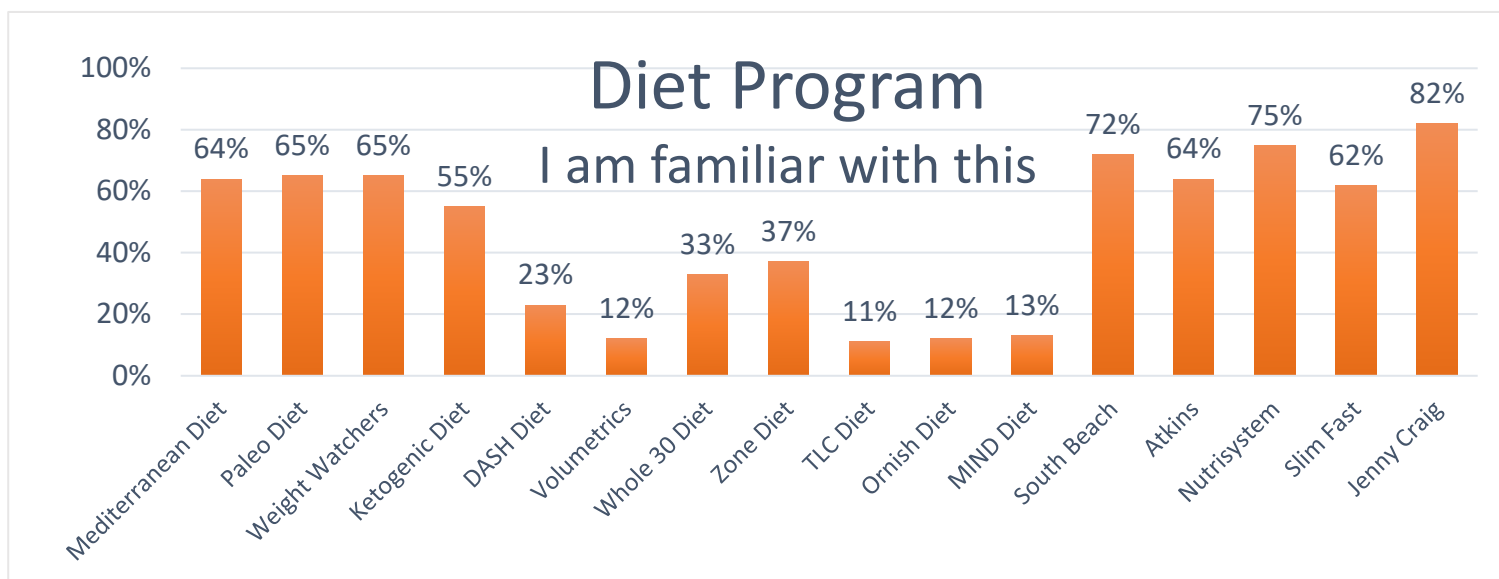
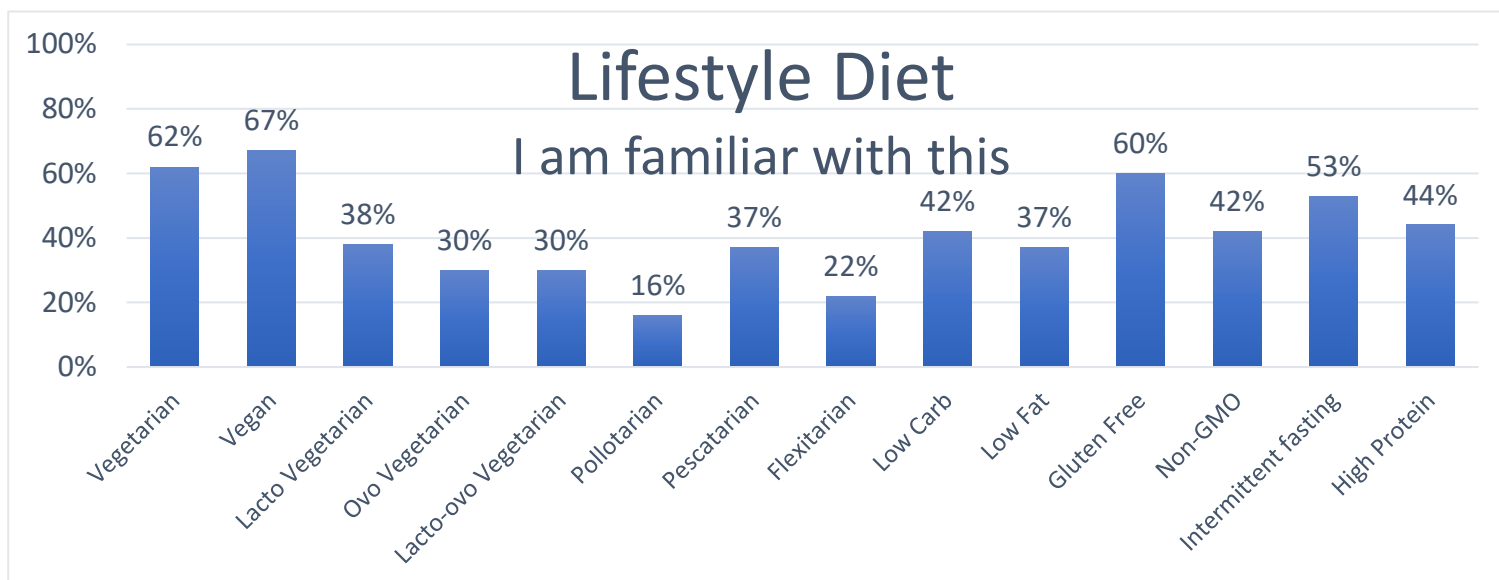
# Lifestyle and Diets within the Clean Label Enthusiasts®

## Familiarity with Lifestyle Choices

When not a lead adopter (trying or having tried), CLE have a high degree of familiarity with various lifestyle and weight loss program dieting plans.

Vegan, Vegetarian and Gluten Free are the top three lifestyle eating choices with which CLE are most familiar.

Of all weight loss diet choices, the most familiar name is Jenny Craig (82%), followed by Nutrisystem and South Beach. Slim Fast, Atkins and Weight Watchers were as familiar as newer “fad” diets such as Mediterranean, Paleo and Ketogenic Diets. Over a third of CLE were familiar with Whole 30 Diet and Zone Diet plans.

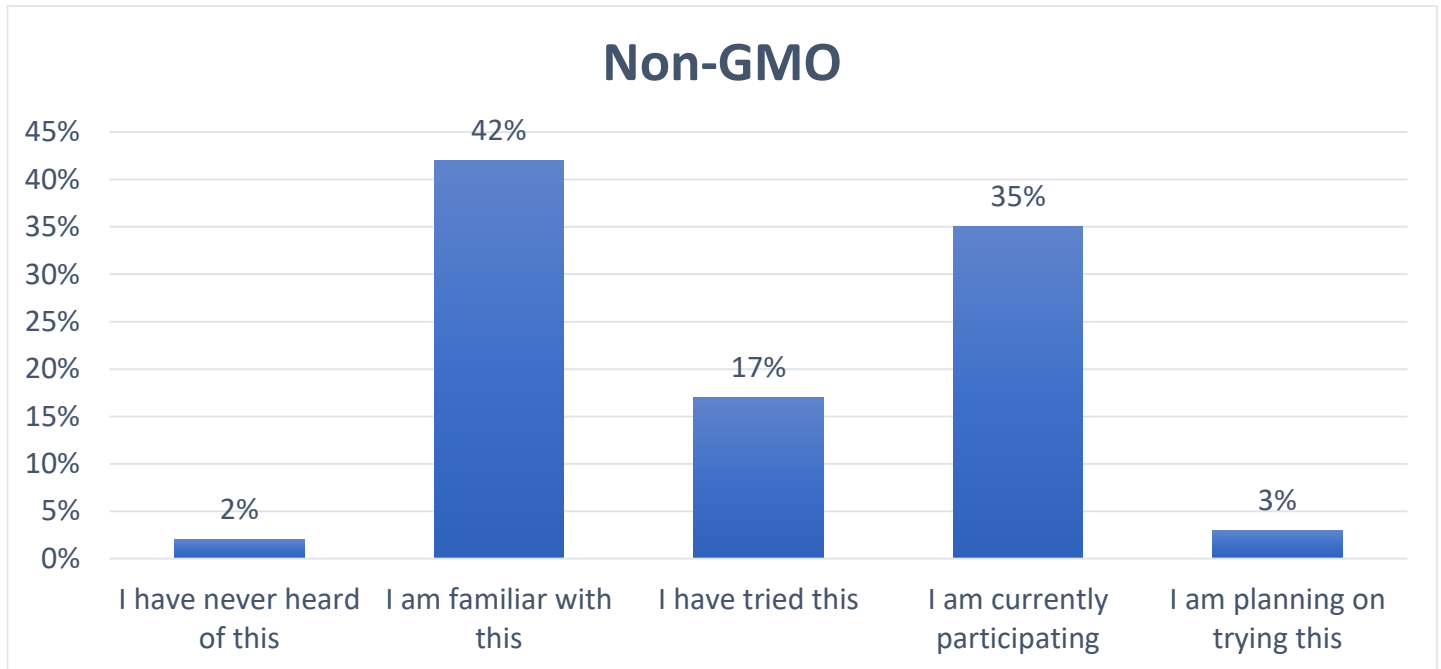




## *Lifestyle and Diets within the Clean Label Enthusiasts®*

### **Specific Lifestyle: Non-GMO**

Non-GMO was the highest scoring lifestyle choice as far as currently participating, and familiarity was high as well. When looking at research from the Clean Label Community Food Behavior Report Q4 2017, this closely supports our findings that non-GMO influences about 40% of CLE.



## *Lifestyle and Diets within the Clean Label Enthusiasts®*

### Lifestyle: Gluten Free



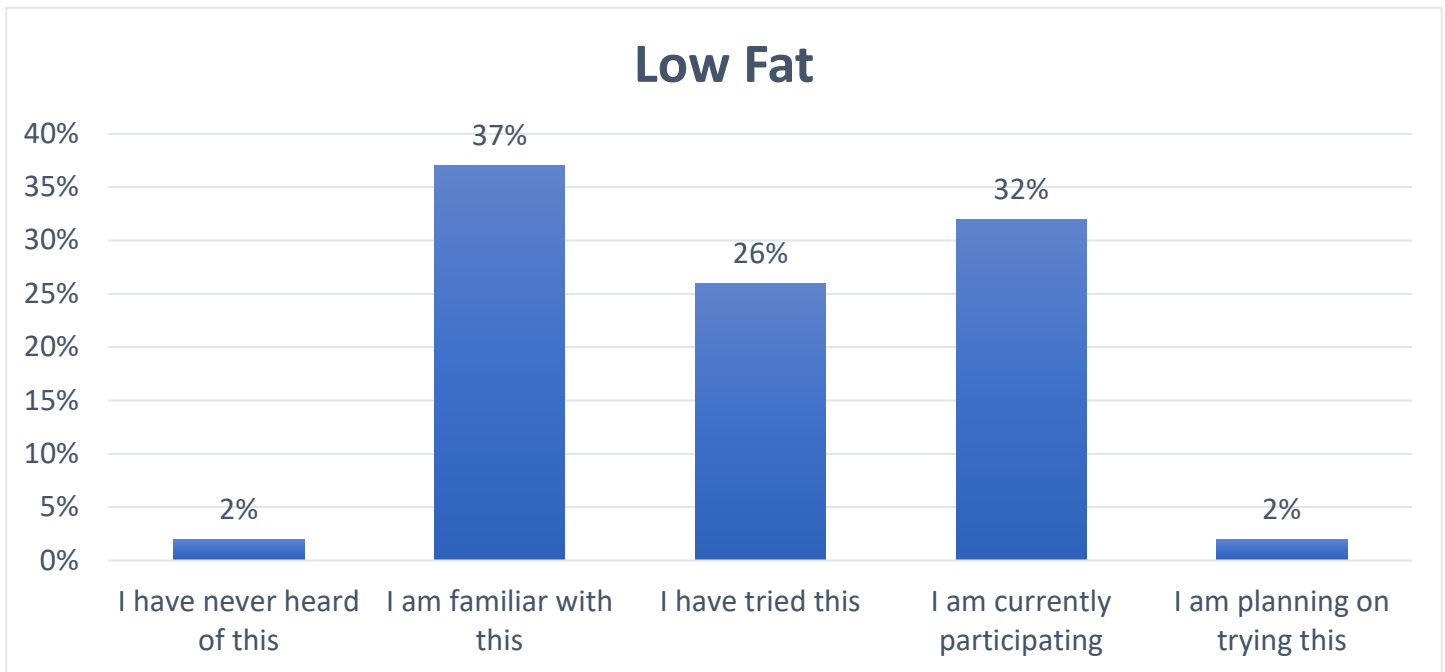
Looking at just this lifestyle, Gluten Free was one of the highest scoring as far as familiarity. When it comes to those currently participating, numbers drop to 17%, and 18% have tried it at some point. This reinforces our previous findings that Gluten Free influences only 20% of CLE (Clean Label Community Food Behavior Report Q4 2017).



## *Lifestyle and Diets within the Clean Label Enthusiasts®*

### **Specific Lifestyle: Low Fat**

Low Fat was a lifestyle choice for nearly 1/3 of CLE members when looking at overall food and beverage choices. This is in line with our prior research (Clean Label Community Food Behavior Report Q4 2017).



## *About Us*

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.

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Published January 30, 2019