



## Clean Label Research Community Behavior Report

# Product Scorecarding



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 November 2019 report: **A Global Review of the Clean Living Phenomena**

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# Clean Label Enthusiasts® & Product Scorecarding

## 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, they 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 September 2019, we conducted an online survey. This study consisted of 201 Clean Label Enthusiasts® (CLE) who completed a questionnaire that explored their perceptions of ingredients, claims, and brands in the plant-based meat patty category. From this information we determined 9 Behavioral Key Performance Indicators (KPI) that were the most important to CLEs when choosing and evaluating plant based burgers. This methodology was then compiled into a Behavioral Scorecard that can be a strategic tool for Decision Makers of any product based on the category brands, claims and ingredients.



# Summary of What We Learned

- Key Performance Indicators can be used to predict choice using a regression model.
- The most important KPI is awareness.
- Brand trust is also an essential KPI when looking at predicting choice.
- Ingredient statements can make or break a product, simpler ingredient statements are key.
- Previous trial of a product or brand definitely is proven to give lift to the product, consumers do not like the unfamiliar or untested.
- Claims resound with consumers, those based around nutrition carry more weight than those that mention GMO's.
- Clean Label Enthusiasts® do not tolerate some ingredients, and having them in an ingredient statement will certainly prove detrimental to your product.
- If possible, ingredient statements benefit from putting the most favorable (highest Clean Label Score™) ingredients first.
- In the plant-based burger category, there is room for improvement by all companies involved as none have the perfect combination of KPIs that we have defined.








# Which Behavioral KPIs Were Most Important?

## Regression Model to Predict Ranked Choice from Behavioral KPIs

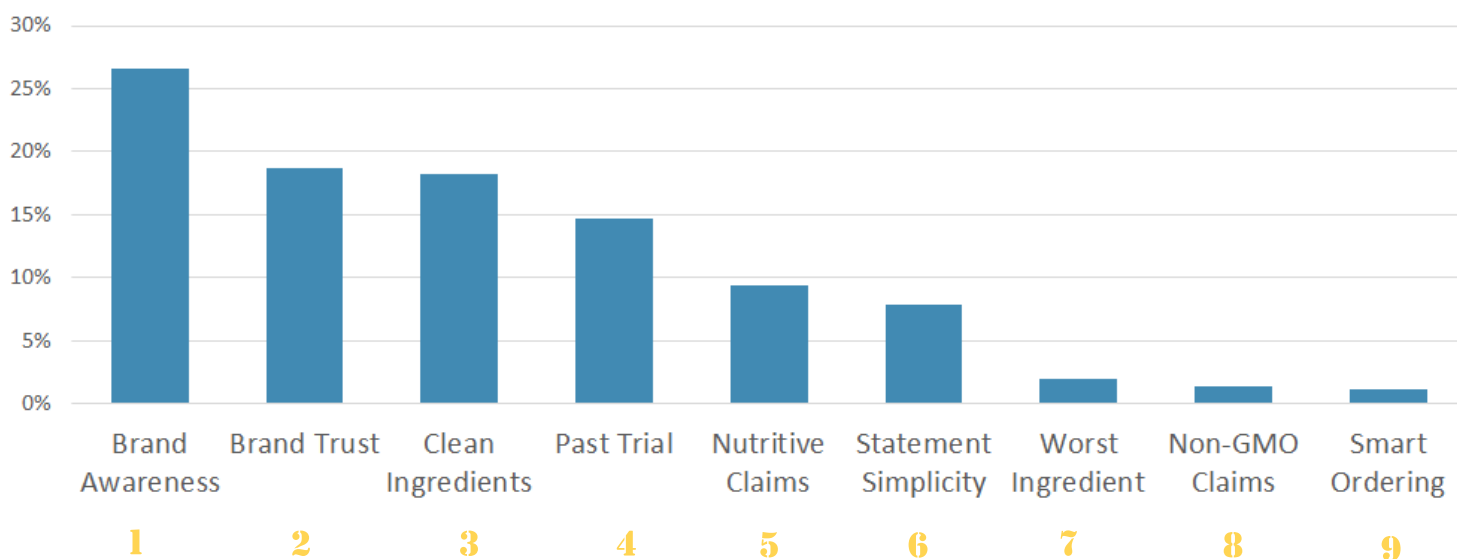
From these 3 plant-based burger patty products, please select the product that is the **MOST APPEALING** to you and the product that is the **LEAST APPEALING** to you.

Please select one response in each column.

	Most Appealing	Least Appealing
 <p><b>Boca All American Classic Burger</b> Non-GMO Soy, High Protein <b>Ingredients:</b> Water, Soy Protein Concentrate, Reduced Fat Cheddar Cheese (Pasteurized Part-Skim Milk, Cheese Culture, Salt, Enzymes, Annatto (Color), Vitamin A (Palmitate)), Wheat Gluten, Corn Oil, Yeast Extract, Caramel Color, Modified Cellulose, Salt, Natural Flavor (Non-Meat), Dried Onion, Garlic Powder, Sesame Oil.</p>	<input type="radio"/>	<input type="radio"/>
 <p><b>Gardenburger The Original Veggie Burger</b> Natural Ingredients, Lots of Whole Grain, Good Source of Fiber <b>Ingredients:</b> Cooked Brown Rice (Long Grain Brown Rice, Water), Button Mushrooms, Rolled Oats, Mozzarella Cheese (Pasteurized Part-Skim Milk, Cultures, Salt, Enzymes), Onions, Water, Hydrated Wheat Bulgur (Water, Bulgur Wheat), Cremini Mushrooms, Spices, Portabella Mushrooms, Cheddar Cheese (Pasteurized Milk, Salt, Enzymes, Cultures, Annatto Color), Contains 2% or less of Salt, Natural Flavors, Modified Vegetable Gum, Garlic Powder, Yeast Extract, Citric Acid, Whey, Malted Barley, Annatto Color, Malted Barley Flour, Onion Powder, Mushroom Powder, Guar Gum, Annatto Extract (Color), Turmeric Extract (Color), Soy Lecithin.</p>	<input type="radio"/>	<input type="radio"/>
 <p><b>Beyond Burger</b> No Soy, No Gluten, Non-GMO Project Verified, High Protein <b>Ingredients:</b> Water, Pea Protein Isolate, Expeller-Pressed</p>		

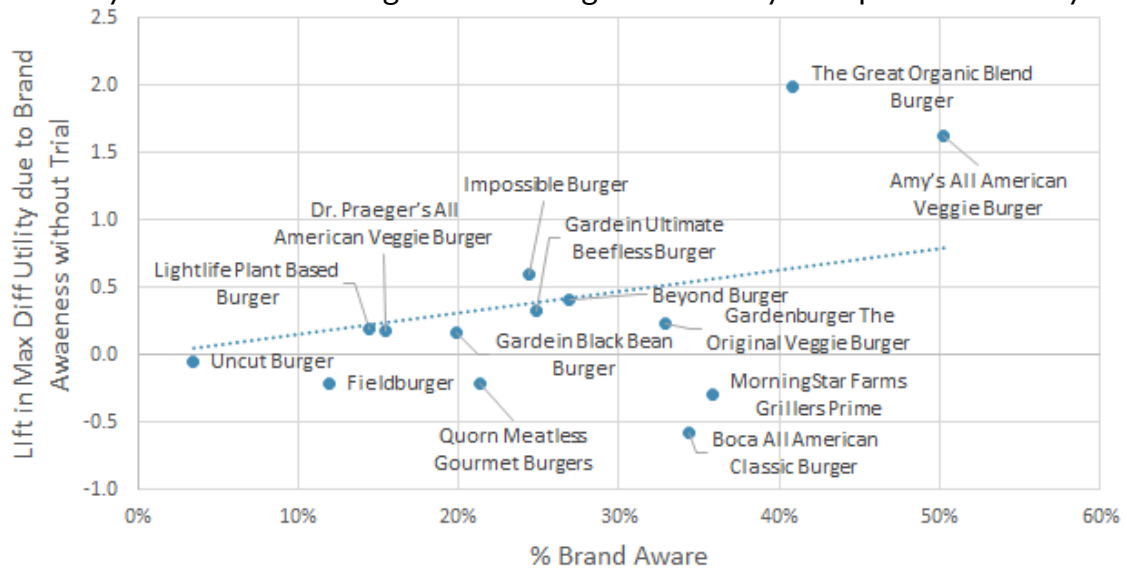
While all of the KPIs have a positive relationship with product choice, some proved to be more critical than others in the model.

Importance Weights

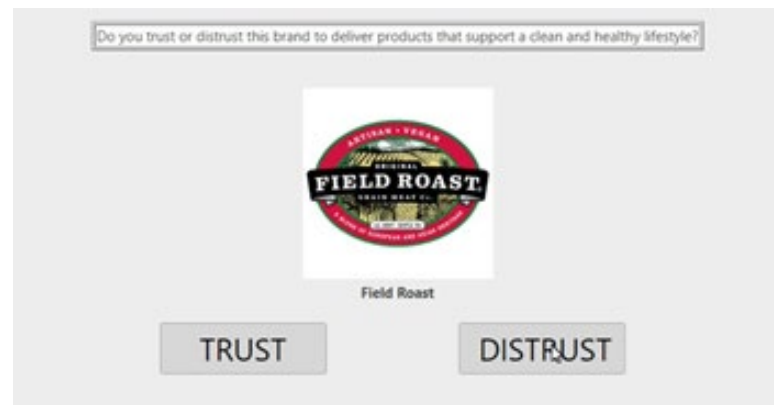
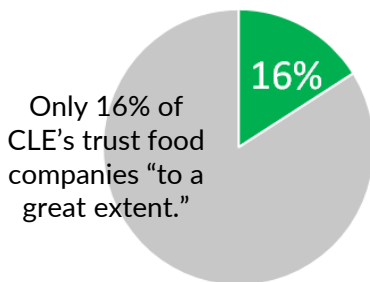


# KPIs – Brand Awareness and Brand Trust

**1 Brand Awareness** – How many consumers are familiar with your brand? Do previous consumer experiences with and perceptions of your brand encourage or discourage them to try new products from your brand?



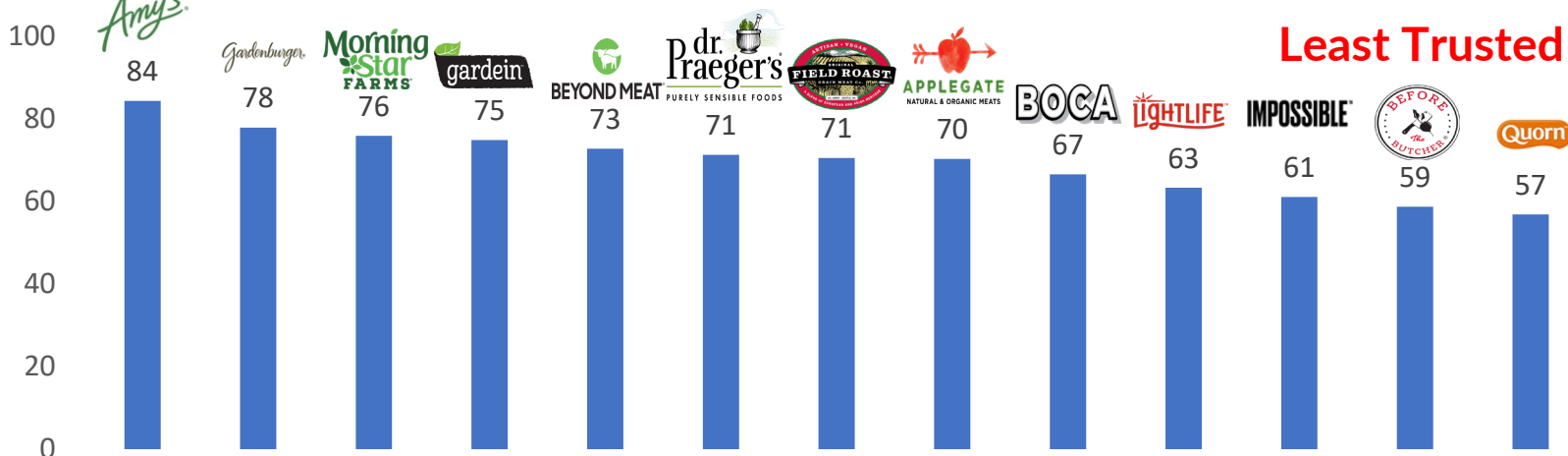
**2 Brand Trust** – Does your name mean trust? Brand Trust evaluates Clean Label Enthusiasts® trust in your brand to deliver products that support a clean and healthy lifestyle. This measurement uses the Implicit/Explicit test to understand consumer behavioral reactions to the brand.



## Most Trusted

## Brand Trust

## Least Trusted



# KPIs – Clean Ingredients and Past Trial

Determine each ingredients' clean score. **Clean Ingredients** allowed for the assessment of all 193 ingredients in the product ingredient lists. Each Clean Label Enthusiast that participated evaluated 50 ingredients.

**Implicit/Explicit Test:**  
100 point score measuring how much each ingredient contributes to a Clean Label.

For the following ingredients in plant-based burger patties as a main meal: are you OK with the ingredient or do you AVOID it.

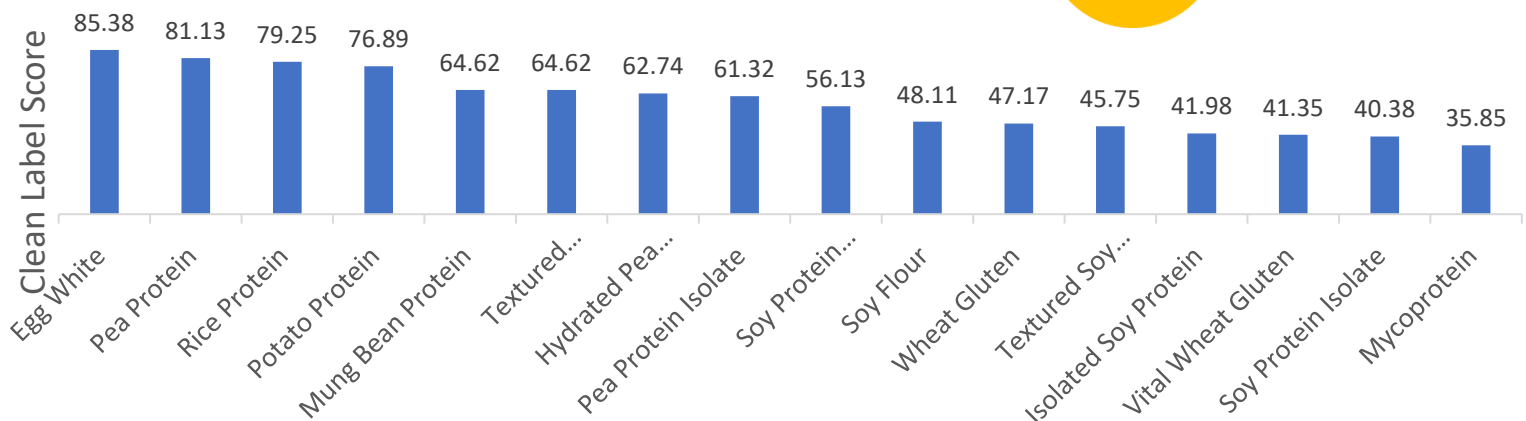
Ingredients for plant-based burger patties as a main meal or part of a meal.

SUCCINIC ACID

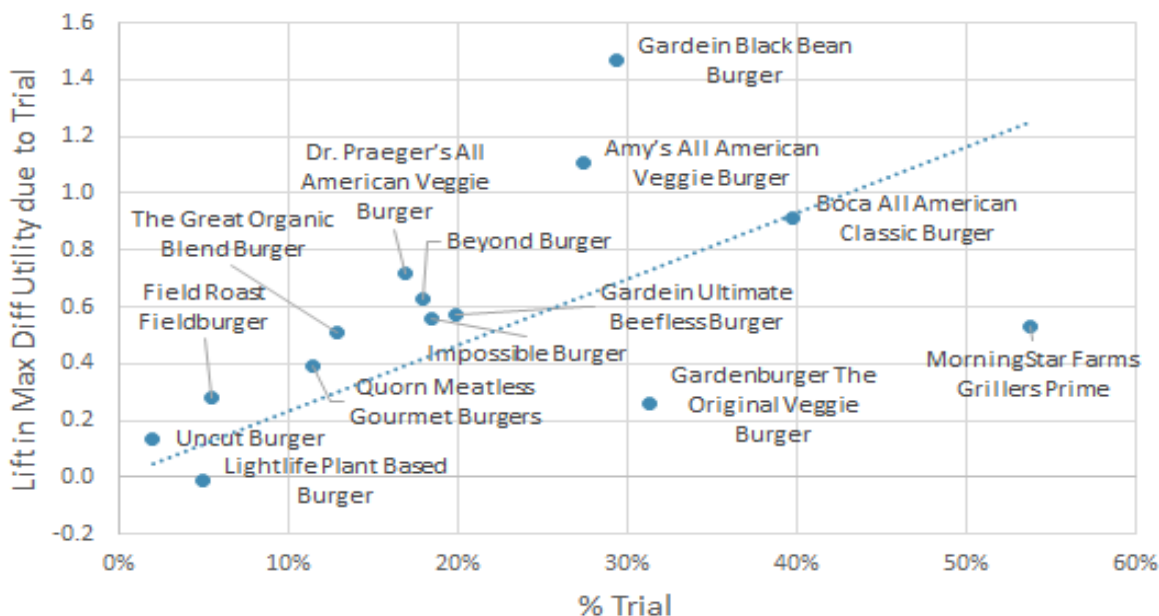
OK AVOID

Implicit Behavioral Measures  
% Avoid and Time to Respond

## Proteins



**Past Trial** – How many consumers have tried your product? Do they like it enough to repeat instead of choosing another option?



# KPIs – Nutritive Claims and Statement Simplicity

Inform your consumers! **Nutritive Claims** have an influence on your product, call out those things that are important and differentiating.

*Less Fat*  
*Reduced Fat*  
*No Cholesterol*  
*High Protein*  
*Excellent Source of Protein*  
*Good Source of Fiber*

20 points  
per claim  
(0-100 per SKU)

Evaluates influence of claims on choice of products

Did this claim influence your choice of the most appealing plant-based burger patty products?

GLUTEN FREE

YES NO

Keep the product simple! **Statement Simplicity** evaluates the length of the ingredient list to ensure Clean Label Enthusiasts do not view your product as having an excessive number of ingredients. Shorter ingredients lists are more appealing.

Why would consumers want this...

Impossible Burger

41

**Ingredients:** Water, Soy Protein Concentrate, Coconut Oil, Sunflower Oil, Natural Flavors, Potato Protein, Methylcellulose, Yeast Extract, Cultured Dextrose, Food Starch Modified, Soy Leghemoglobin, Salt, Soy Protein Isolate, Mixed Tocopherols (Vitamin E), Zinc Gluconate, Thiamine Hydrochloride (Vitamin B1), Sodium Ascorbate (Vitamin C), Niacin, Pyridoxine Hydrochloride (Vitamin B6), Riboflavin (Vitamin B2), Vitamin B12.

Dr. Praeger's All American Veggie Burger

52.2

**Ingredients:** Hydrated Pea Protein (Water, Pea Protein), Avocado Oil, Onions, Sweet Potato Puree, Butternut Squash Puree, Carrot Puree, Natural Flavors, Methylcellulose, Fruit Juice Color, Oat Fiber, Potato Starch, Roasted Garlic, Sea Salt.

The Great Organic Blend Burger

92

...when this is so short and clean!

**Ingredients:** Organic Grass-Fed Beef, Organic Mushrooms, Organic Rosemary Extract.

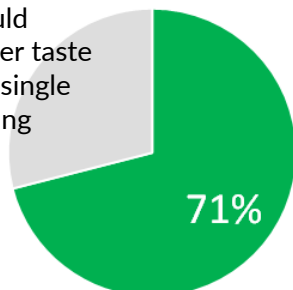




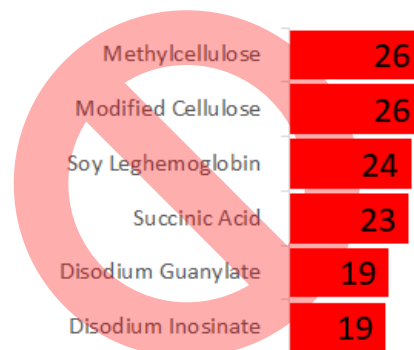
## KPIs – Worst Ingredient, Non-GMO and Smart Ordering

It only takes one ingredient! **Worst Ingredient** examines how badly your least palatable ingredient will turn off Clean Label Enthusiasts.

71% of Clean Label Enthusiasts would trade away better taste to avoid even a single chemical sounding ingredient.



Clean Label Enthusiasts won't tolerate these:



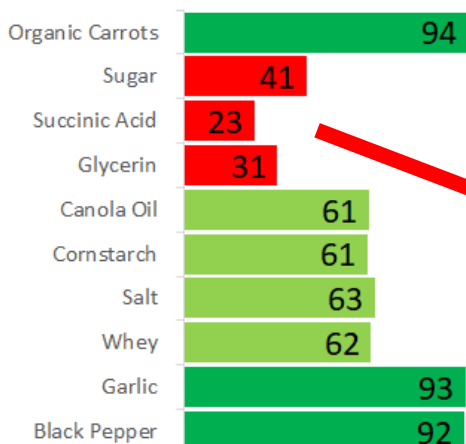
Address Non-GMO concerns! **Non-GMO** claims are considered to have some of the most influence of all potential claims for products.

*No GMOs*  
*Non-GMO*  
*Non-GMO Project Verified*  
*Non-GMO Soy*

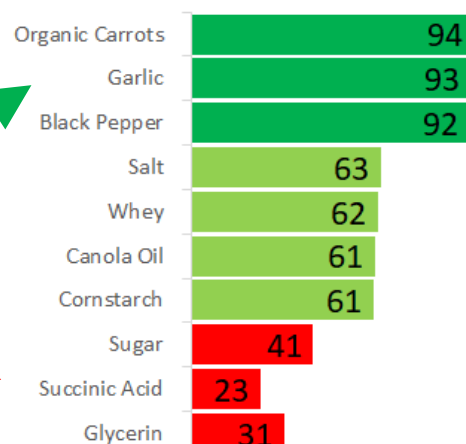
80 - 100 points  
 (0-100 per SKU)

Put your best foot forward! **Smart Ordering** measures whether the first impression Clean Label Enthusiasts have when reading your product's ingredients list is positive by beginning with popular ingredients that receive higher clean label scores.

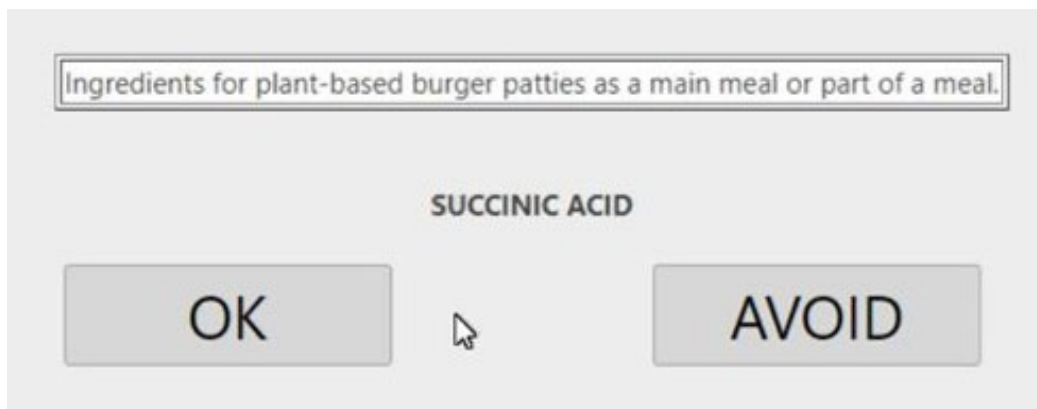
Don't show consumers this....



....excite them with this!!

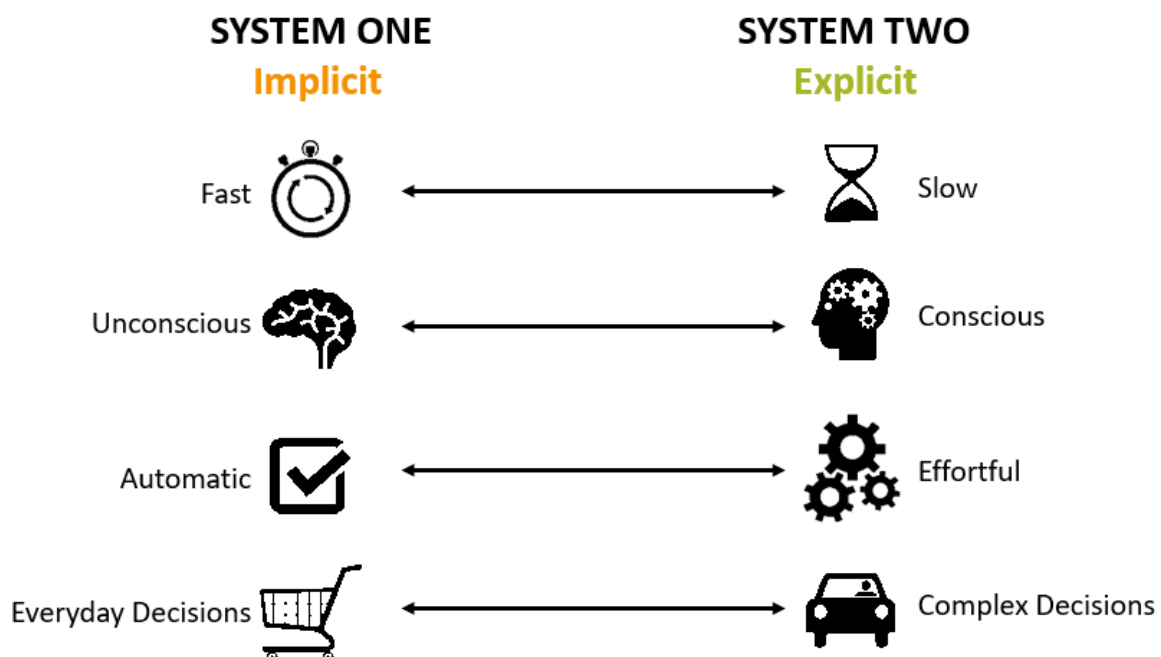


# Implicit/Explicit Test™ Methodology

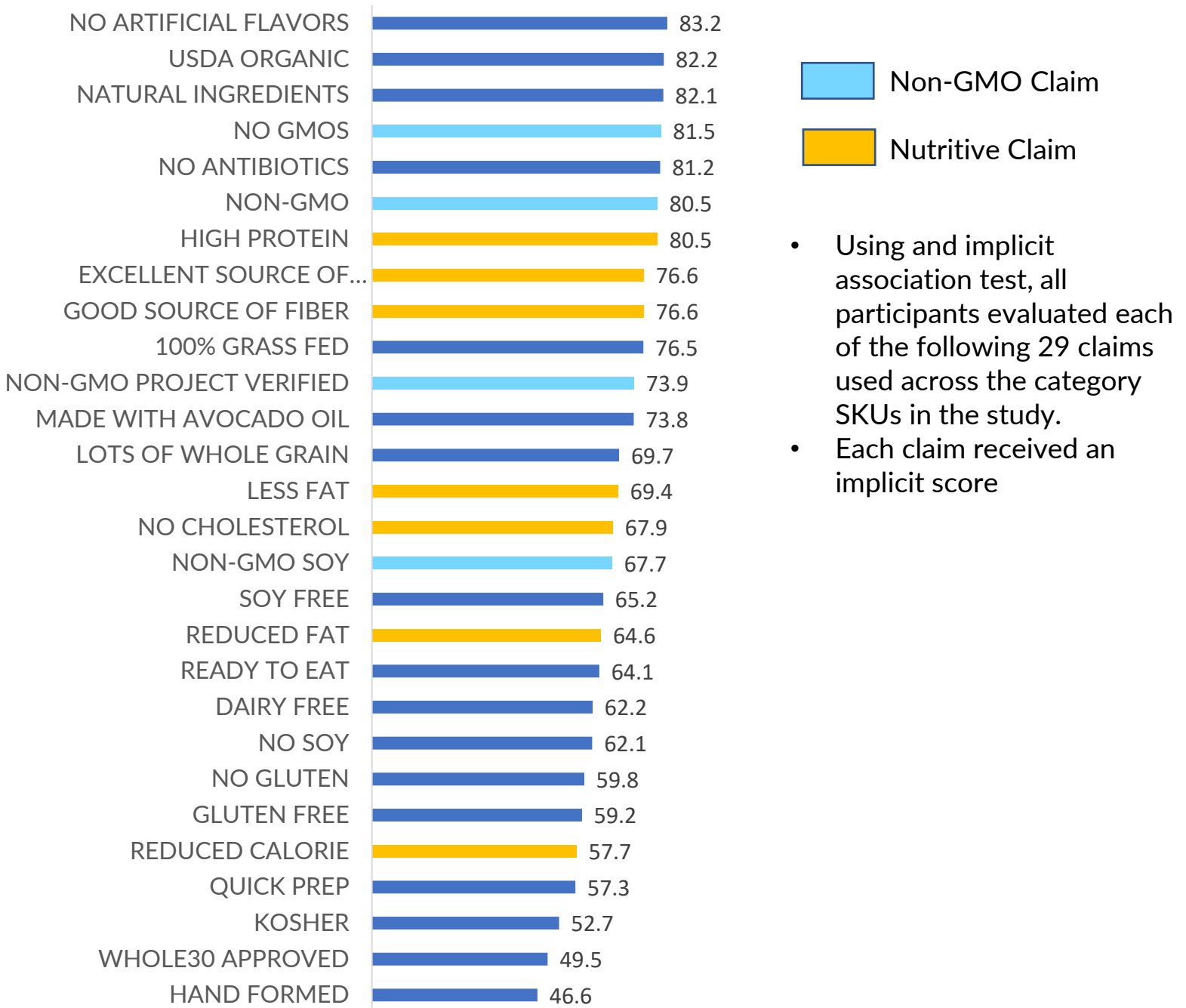


In order to measure CLE consumers' reactions to various ingredients in plant-based burger patties, we conducted an Implicit/Explicit Test™. Participants were shown a list of ingredients, one at a time, and asked to select "OK" or "Avoid" as quickly as possible. The ingredients were taken from current ingredient lists within the plant-based burgers category. Each participant evaluated 50 ingredients out of the 193 total ingredients in the products we tested. Their choice and reaction time were used to calculate a clean label score for each ingredient. Higher clean label scores indicate that participants were more likely to implicitly accept an ingredient, while lower clean label scores indicate that they were more likely to implicitly reject an ingredient.

## Indicators of Behavior Measuring System 1 and 2 Modes of Thinking



# KPIs – Claims Influence

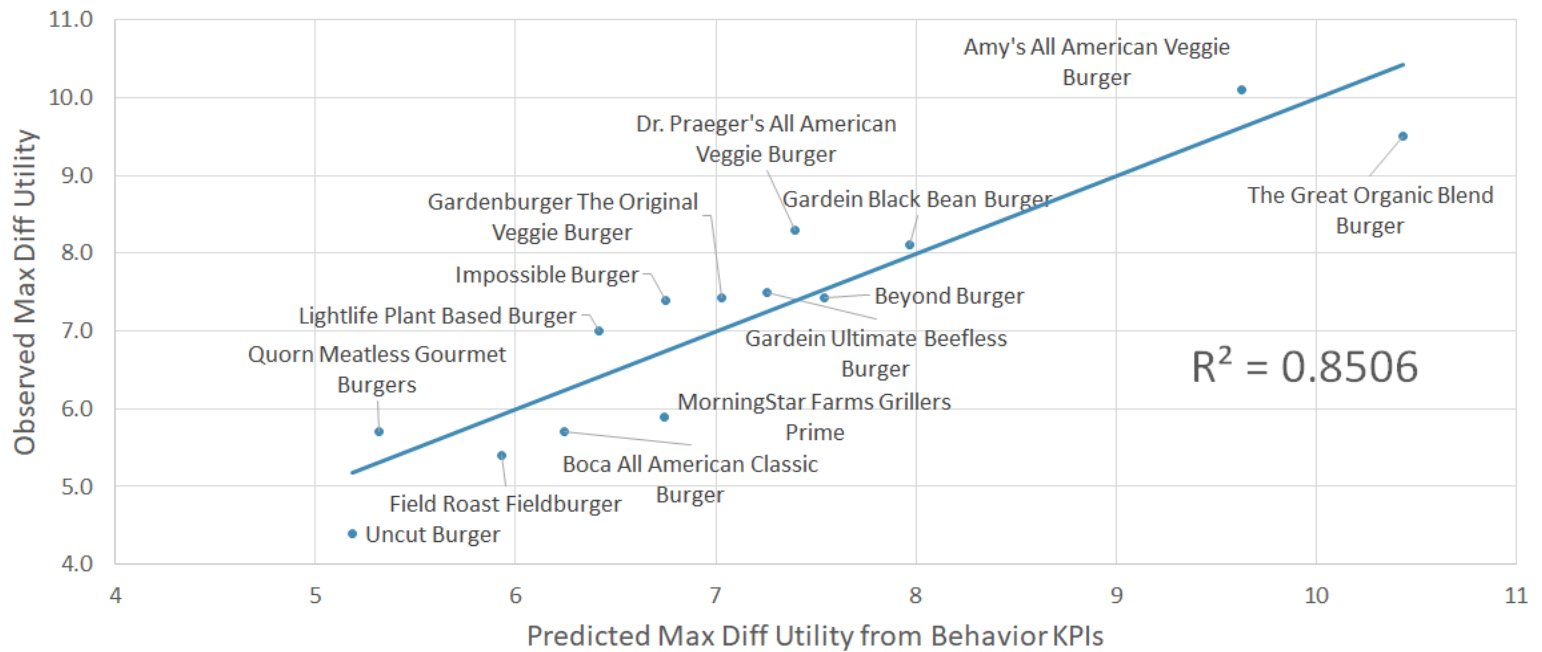


Did this claim influence your choice of the most appealing plant-based burger patty products?

GLUTEN FREE

YES NO

# Prediction Model for Ranked Choice (Max Diff Utility)



Using the prediction model from Behavior KPIs and plotting against what was observed, a linear relationship emerges.



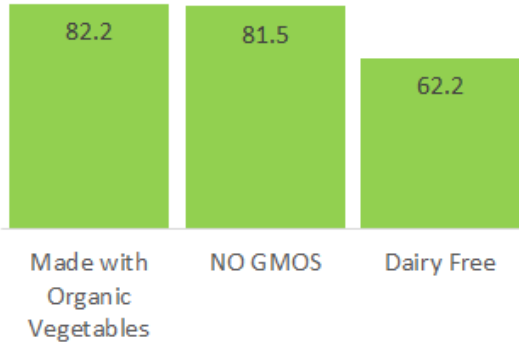
# Plant-Based Burger Category Product Scorecard

*Amy's*

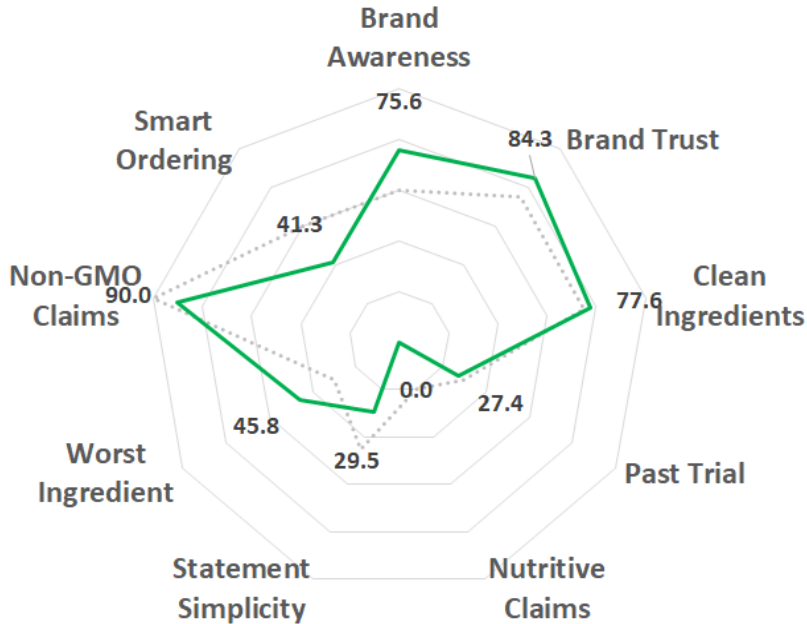
All American Veggie Burger



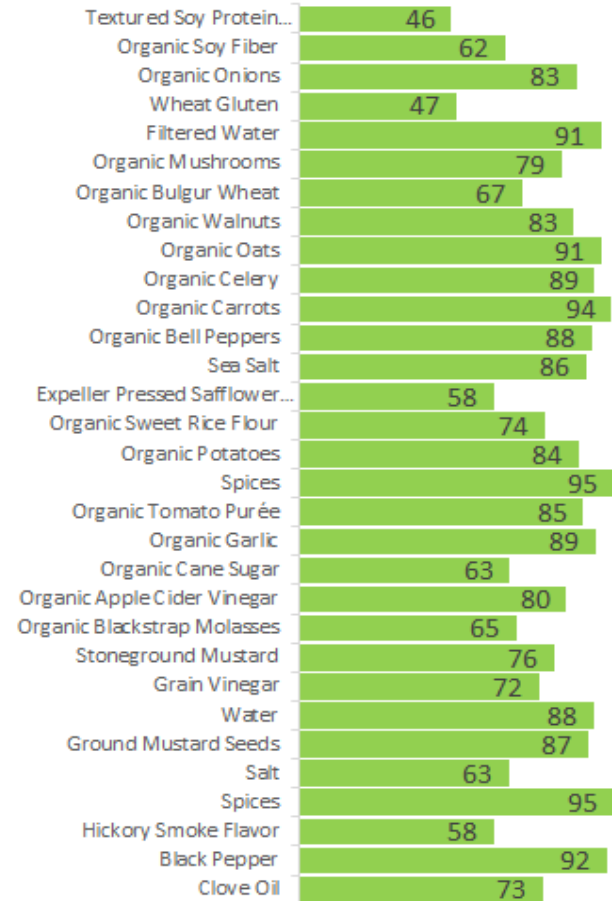
## Top Claims



## KPI Scores



## Ingredient Scores

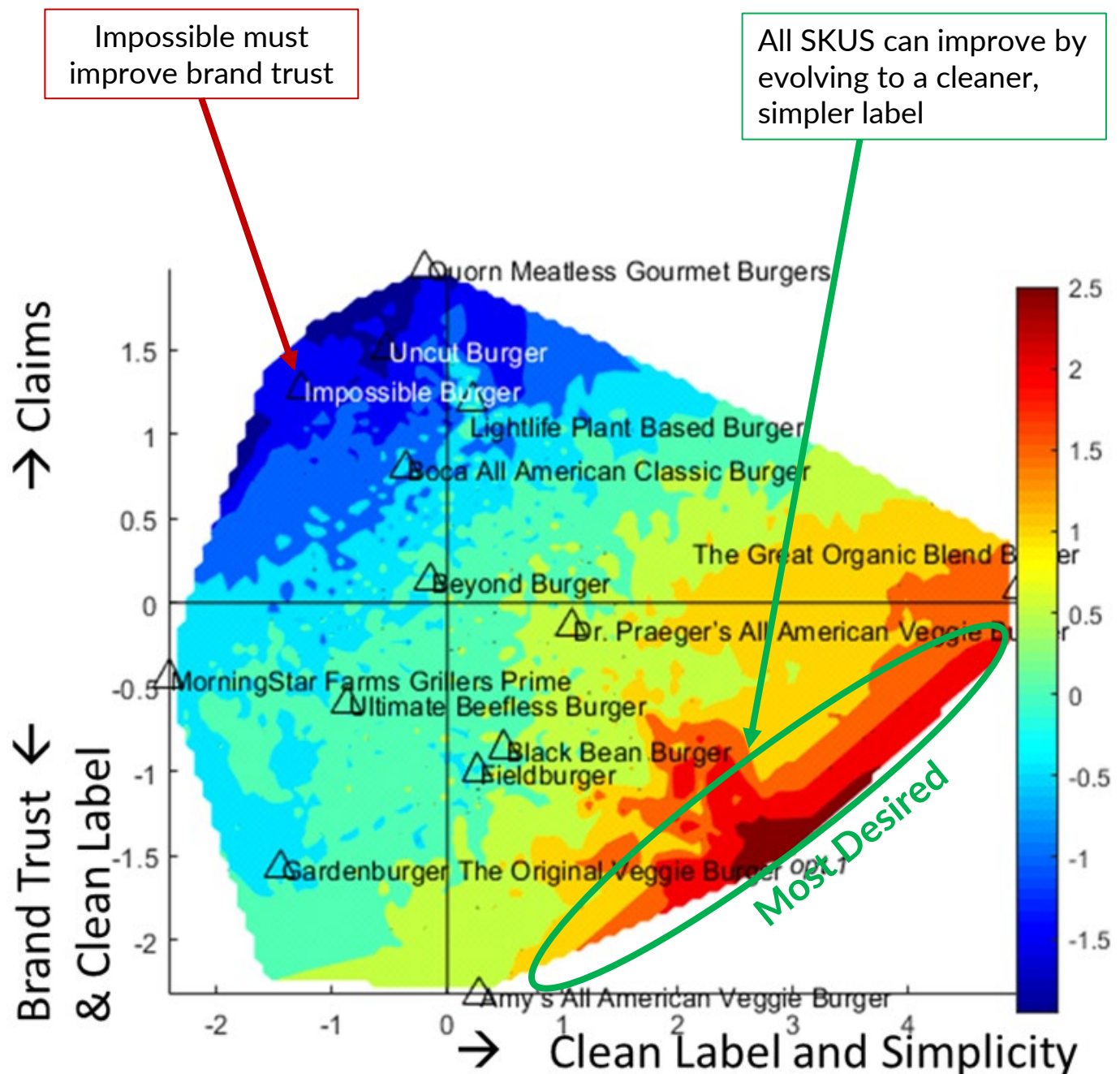


**Ingredients:** Textured Soy Protein (Hexane Free), Organic Soy Fiber, Organic Onions, Wheat Gluten, Filtered Water, Organic Mushrooms, Organic Bulgur Wheat, Organic Walnuts, Organic Oats, Organic Celery, Organic Carrots, Organic Bell Peppers, Sea Salt, Expeller Pressed Safflower Oil, Organic Sweet Rice Flour, Organic Potatoes, Spices, Organic Tomato Purée, Organic Garlic, Organic Cane Sugar, Organic Apple Cider Vinegar, Organic Blackstrap Molasses, Stoneground Mustard (Grain Vinegar, Water, Ground Mustard Seeds, Salt, Spices), Hickory Smoke Flavor, Black Pepper, Clove Oil.



# Individual Prediction Models - Ranked Choice

- 9% Rank Choice Explained from Awareness and Trial
- Amy's, Impossible, Beyond Meat the Most lift from Awareness
- 85% Additional Variation from other Behavioral KPIs



*To our valued subscribers:*

We thank you for subscribing to the Clean Label Enthusiasts® Behavior Report and we look forward to providing future issues to help you achieve more rapid informed clean label decisions.

Interest in plant-based foods are creating a tectonic shift in clean eating among not only Clean Label Enthusiasts but other shoppers as well. Therefore, this issue is most relevant for companies seeking to quickly bring to market plant-based foods. The interest in plant-based burgers that have the same taste, look, and mouthfeel as beef is bringing in new users into the category. We are closely watching this category in anticipation of how plant-based foods will impact other categories.

As always, we welcome your input about how future issues can be of further value in helping you overcome the challenges of the clean label movement.

Sincerely,

Dave Lundahl, Ph.D.  
CEO, InsightsNow, Inc.