

Clean Label Research Community Behavior Report: Packaging Impact on Consumer Behavior Part One



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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 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 May 2019 report: **Clean Label Enthusiasts® & Packaging – Part 1**.

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Clean Label Enthusiasts® & Packaging – Part 1

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 May 2019, we conducted an online survey with 195 Clean Label Enthusiasts (CLE) and 216 primary shoppers who are not concerned with clean labels (Non-CLE). Both sets of participants completed a survey about their attitudes, motivations, and behaviors related to food and beverage packaging.



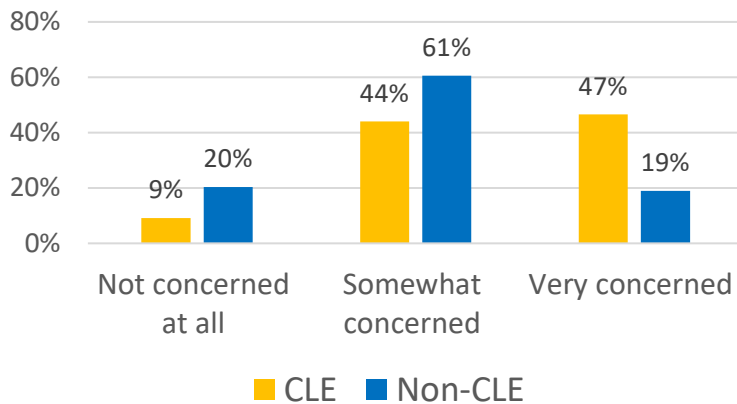
Summary of What We Learned

- ✓ **47%** of CLE said they were **very concerned** about what food and beverage packaging materials are made of, compared to **19%** of Non-CLE.
- ✓ **63%** of CLE would **avoid purchasing a product** if they were uncertain about what its package was made of, compared to **38%** of Non-CLE.
- ✓ Only **11%** of both CLE and Non-CLE stated that they are always able to **get all the information they need** regarding food packaging materials.
- ✓ Only **22%** of CLE would purchase a food or beverage if it was sold in packaging that **might not be sustainable**, compared to **38%** of Non-CLE.
- ✓ Only **4%** of CLE would purchase a food or beverage if it was sold in packaging that **might not be safe for their health**, compared to **16%** of Non-CLE.
- ✓ CLE are more likely than Non-CLE to often **reuse, recycle, or compost** packaging.
- ✓ **51%** of CLE avoid purchasing a product with **too much packaging**, compared to **35%** of Non-CLE.



Packaging Concern & Purchase Behavior

Concern About Food & Beverage Packaging

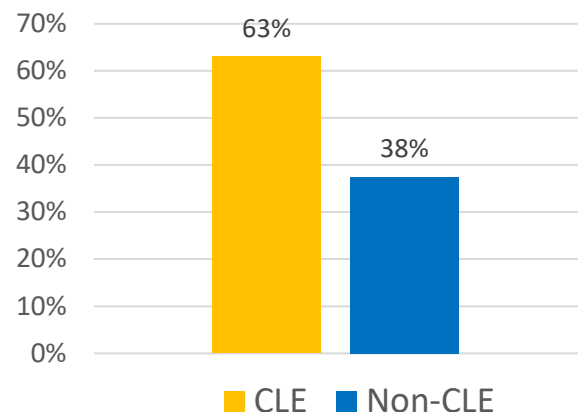


Clean Label Enthusiasts® are more likely than Non-CLE to pay attention to packaging: 47% of CLE said they were very concerned about what food and beverage packaging materials are made of, compared to only 19% of Non-CLE. Importantly, 63% of CLE would avoid purchasing a product if they were uncertain about what its package was made of, compared to 38% of Non-CLE.

These findings demonstrate that CLE will go to great lengths to ensure that the packaging materials that their food or drink comes in are acceptable. Since CLE are forward thinkers, this suggests that food and beverage packaging materials are likely to become even more of an important consideration for consumers in the future.

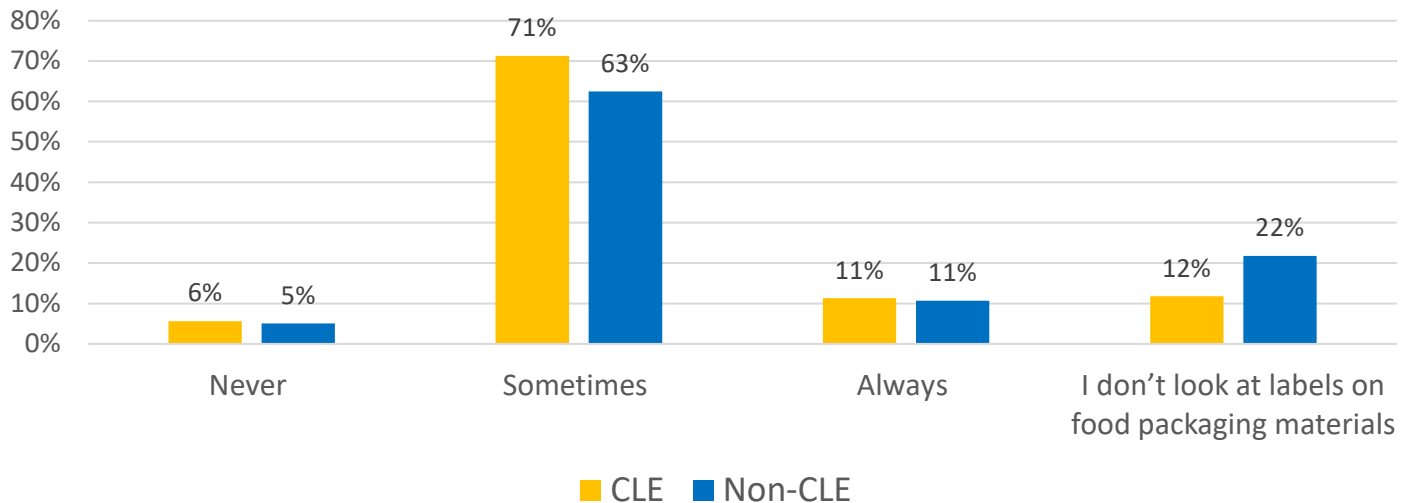


I avoid purchasing a product if I'm uncertain what its package is made of



Food & Beverage Packaging Information

Are you able to get the information you need about food packaging materials?

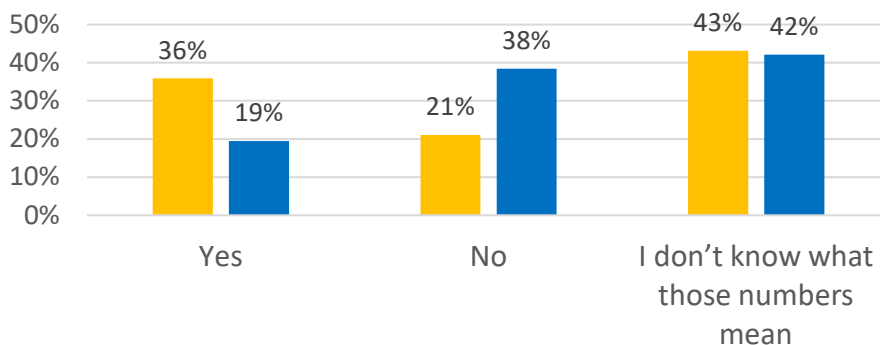


Importantly, both CLE and Non-CLE reported that when they look at food products to glean information about packaging materials, they are not necessarily able to find what they need. In fact, only 11% of all participants stated that they are *always* able to get all the information they need regarding food packaging materials. This suggests that food companies need to work on making their packaging material labels clearer and more informative—particularly since such a high percentage of CLE mention being very concerned about food packaging materials, and even avoid purchasing products when they are uncertain of what the package is made of.

More CLE (36%) than Non-CLE (19%) look at the numbers on plastic packaging in order to determine whether that type of plastic is acceptable to them. Interestingly, almost half of both CLE and Non-CLE don't know what the numbers on plastic packaging mean, which implies that manufacturers could benefit from sharing more details about their packaging on labels, beyond merely adding numbers.



Do you look at number on package to know the type of plastic?

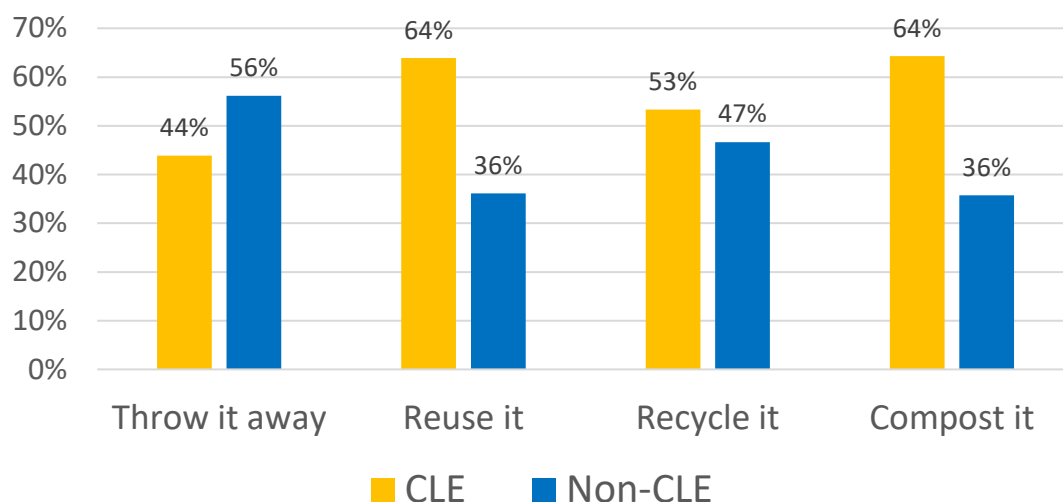


■ CLE ■ Non-CLE



Sustainable Behaviors

For food/beverage packaging, I often...



Clean Label Enthusiasts® tend to engage in sustainable behaviors: CLE are more likely than Non-CLE to often reuse, recycle, or compost packaging materials. CLE are also less likely to often throw away packaging materials, compared to Non-CLE. Their sustainable behavior extends to their shopping habits: only 22% of CLE would purchase a food or beverage if it was sold in packaging that might not be sustainable, compared to 38% of Non-CLE.

Clean Label Enthusiasts are trendsetters in the consumer realm, so their insistence on sustainable food and beverage packaging suggests that it is likely to become even more of an important concern for consumers in the future.

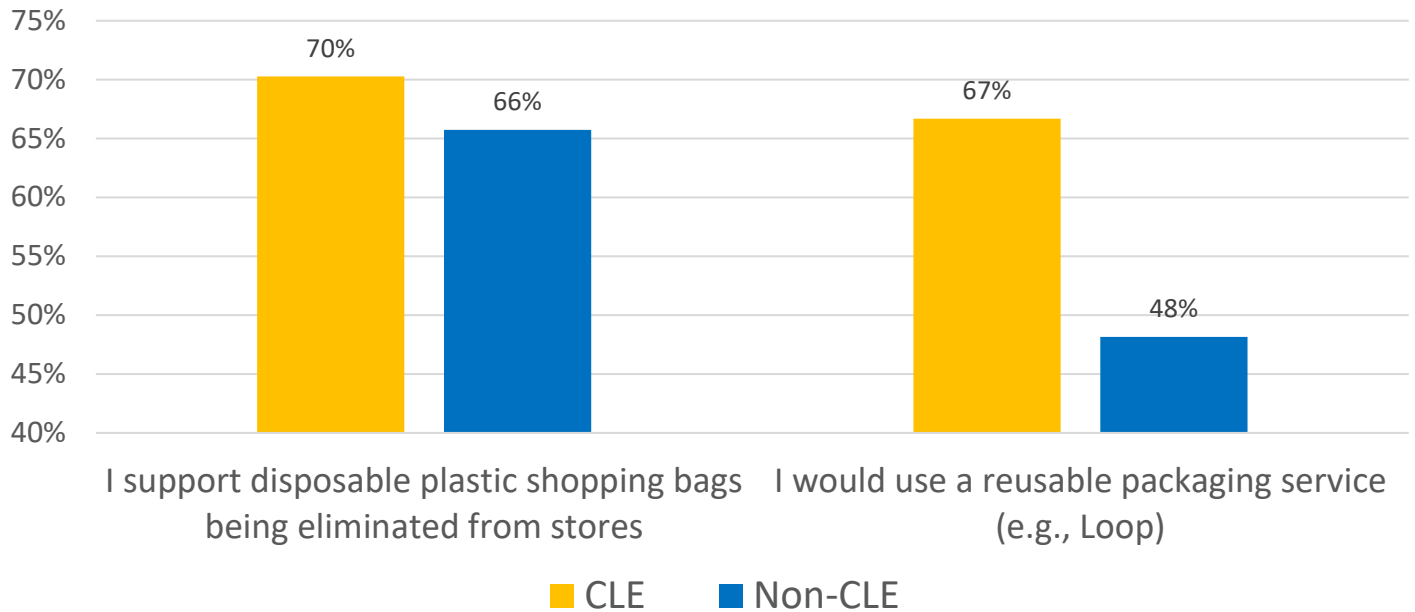


If the packaging of a product may not be sustainable, I would...



Attitudes Toward Sustainability

Support for Sustainability Initiatives

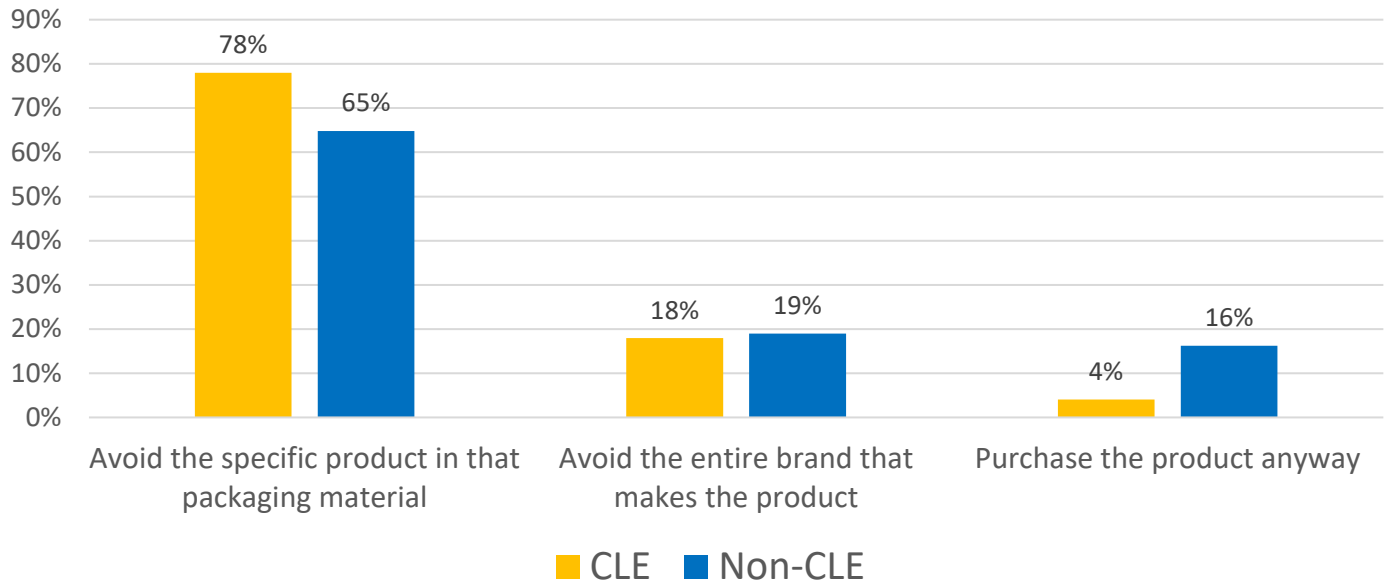


Clean Label Enthusiasts® not only engage in sustainable behaviors, but tend to have positive attitudes toward sustainability initiatives as well. The majority of both CLE and Non-CLE support disposable plastic shopping bags being eliminated from retail stores. In addition, 67% of CLE (compared to only 48% of Non-CLE) would use a reusable packaging service that cuts down on packaging waste (e.g., Loop) if it was available in their area.



Impact of Packaging on Health

If the packaging material of a product may not be safe for my health, I would...

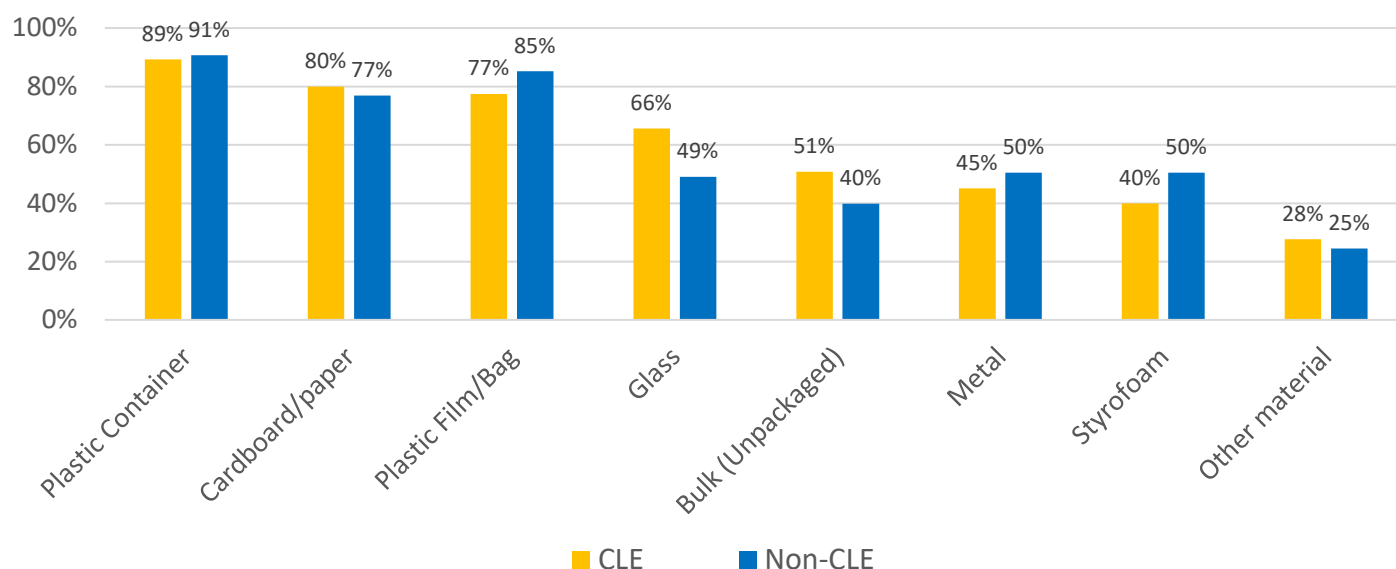


Clean Label Enthusiasts® are particularly worried about the impact of packaging materials on their health. Only 4% of CLE would purchase a food or beverage if it was sold in packaging that might not be safe for their health (vs. 16% of Non-CLE). Food and beverage companies should take note that not only the health impact of the product itself, but also the health impact of its packaging, is an important concern for forward-thinking consumers.



Packaging Materials Purchased

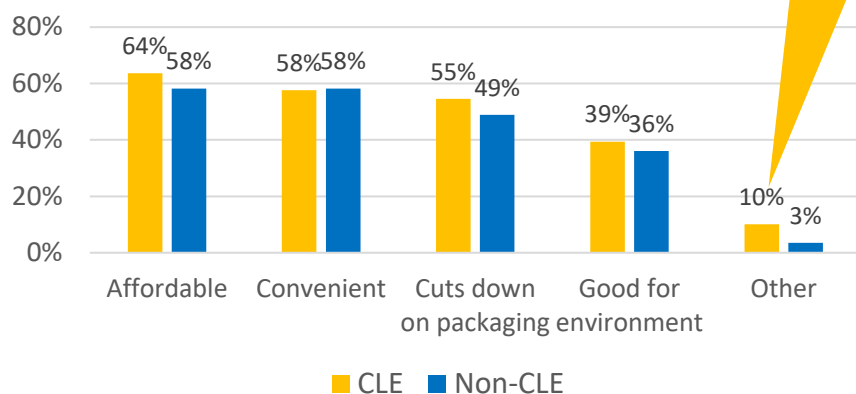
Food or Beverages Typically Purchased In...



Plastic containers, cardboard/paper, and plastic film/bags were generally very popular packaging materials for everyone. However, Clean Label Enthusiasts® were less likely than Non-CLE to purchase food and beverages in plastic film/bags and Styrofoam; they were also more likely than Non-CLE to purchase products in glass or in bulk (unpackaged). Out of those who said they tend to purchase in bulk, the majority of both CLE and Non-CLE cited affordability, convenience, and cutting down on packaging as their reasons for doing so.

Since Clean Label Enthusiasts are lead consumers, these results indicate that purchasing food and beverage products in glass and bulk is likely to become more popular in the future. On the other hand, the popularity of plastic film, plastic bags, and Styrofoam is likely to decline in the future.

Why do you purchase in bulk (unpackaged)?



"I can buy exactly as much or as little as I need"



Unnecessary Packaging

Clean Label Enthusiasts® dislike having what they perceive as too much packaging: 51% of CLE would avoid purchasing a product with too much packaging, compared to 35% of Non-CLE. These data have important implications for food and beverage companies, suggesting that they should be more careful to eliminate unnecessary packaging when selling and shipping items.



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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Published May 30, 2019