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**Clean Label Research Community Behavior Report:**

# Consumer Trust and
# the Free-From Movement

Report Powered By:

## CLEAN LABEL ENTHUSIASTS®
An InsightsNow Community

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## 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 March 2019 report: Clean Label Enthusiasts & Trust.

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CLEAN LABEL ENTHUSIASTS®
An InsightsNow Community

# Clean Label Enthusiasts® & Trust

## 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 March 2019, we conducted an online survey with 203 members of the InsightsNow Clean Label Enthusiasts community (CLE) and 228 members of the general public who are not concerned with clean labels (non-CLE). We had the CLE group complete an implicit test and respond to a questionnaire. The non-CLE group responded to a subset of the questions that the CLE had answered for comparison purposes; however, the non-CLE group did not take part in the implicit test.

# Summary of What We Learned

Based on information we gathered from an online survey and an implicit test, we concluded that:

✓ Only 25% of Clean Label Enthusiasts® trust today's food system, compared to 45% of the general population.

✓ Clean Label Enthusiasts' interest in the clean label movement is driven primarily by their concern for their health (61%) or their family members' health (46%), their distrust of food manufacturers (53%), and their distrust of government regulations (40%).

✓ Shoppers hold federal and state regulatory agencies, manufacturers and farmers most responsible for safe food. A gap exists – more so among CLE – in the percent of shoppers trusting who they hold responsible, especially for federal and state agencies and food manufacturers.

✓ Clean Label Enthusiasts hold restaurants and retailers much less responsible for their food safety than non-CLE; however, they trust these institutions even less than food manufacturers.

✓ CLE were more likely to believe headlines that were true (i.e., based on scientific evidence), compared to headlines that were false (i.e., not based on scientific evidence).

✓ Negative headlines were more believable for sweeteners that CLE had negative perceptions of: sugar, sucralose, and aspartame.

✓ Positive headlines were more believable for sweeteners that CLE had positive perceptions of: agave, monk fruit, honey, and stevia.

✓ Information was most often deemed believable because it aligned with Clean Label Enthusiasts' core beliefs, it was perceived as unbiased, or it was believed to be scientific.

✓ When information was disbelieved, only 10% of CLE would not fact check it at all; the majority (62%) would fact check by looking up the information on another site.



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# Overall Food System Trust

## I trust today's food system
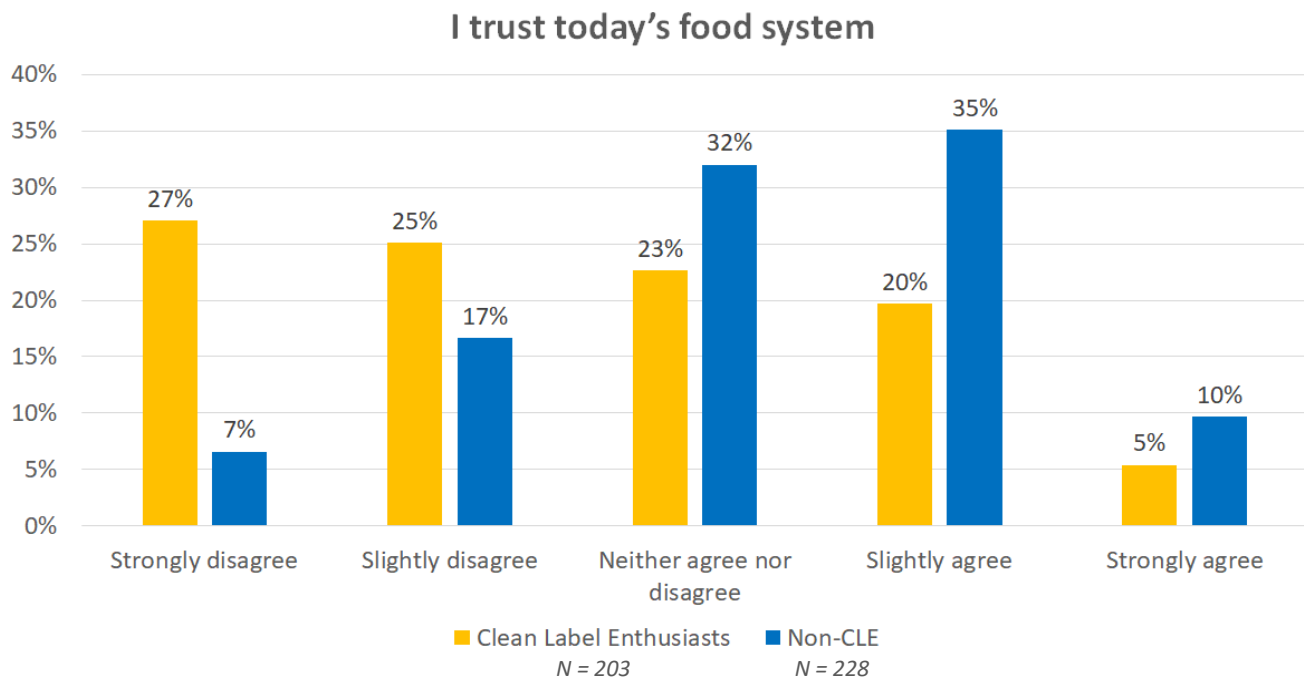


Only a quarter of Clean Label Enthusiasts® indicated that they agreed with the statement "I trust today's food system," while over half disagreed with it. On the other hand, almost half of non-CLE agreed with that statement, and only a quarter disagreed with it. Clearly, CLE are much more suspicious of current food production and manufacturing practices than the general population. This finding is relevant to food and ingredient companies attempting to create claims that appeal to CLE, as it suggests that Clean Label Enthusiasts' general distrust of the food system is likely to translate into an increased distrust of any claims they're exposed to.
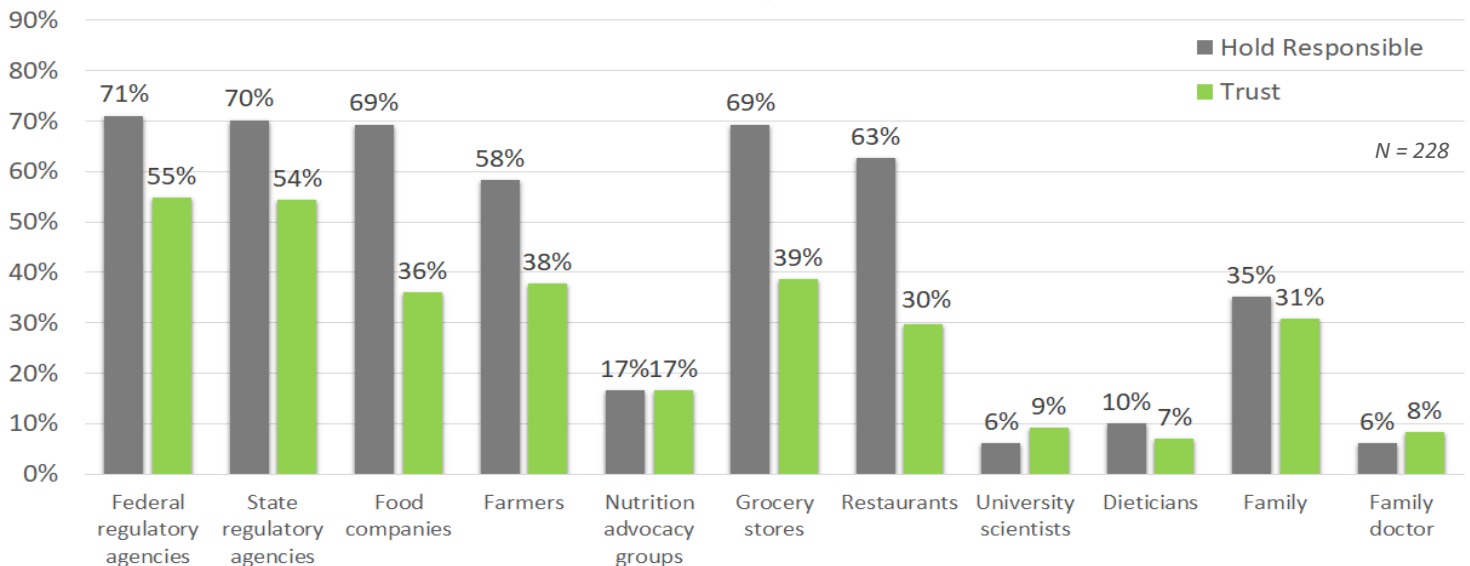
# Gap Between Responsibility & Trust

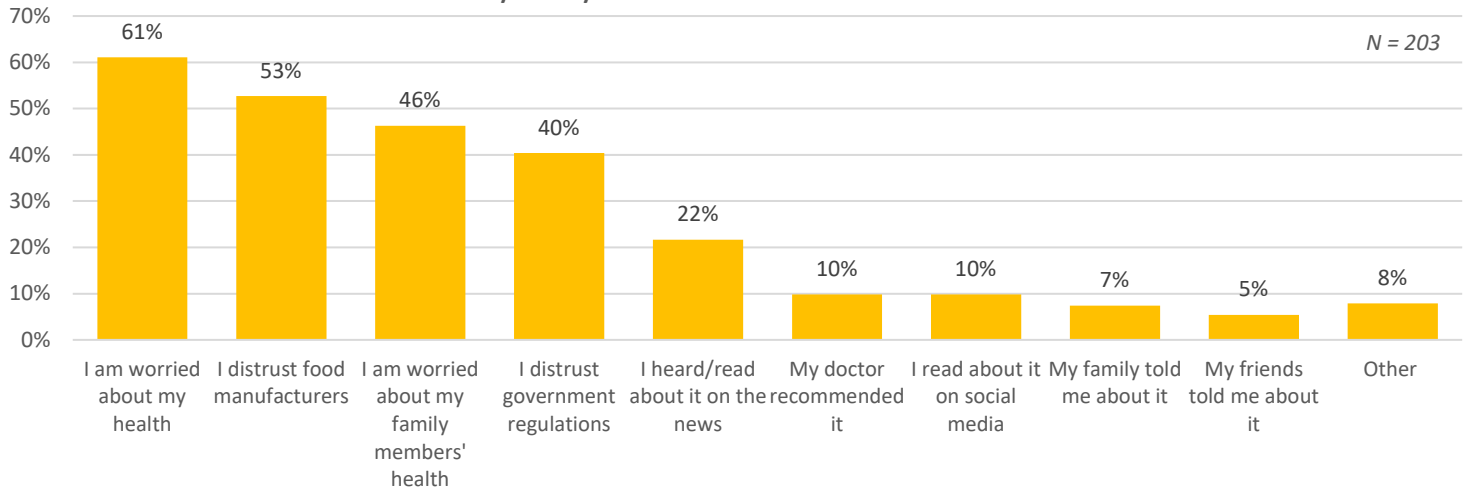## Clean Label Enthusiasts™ – Hold Responsible vs. Trust
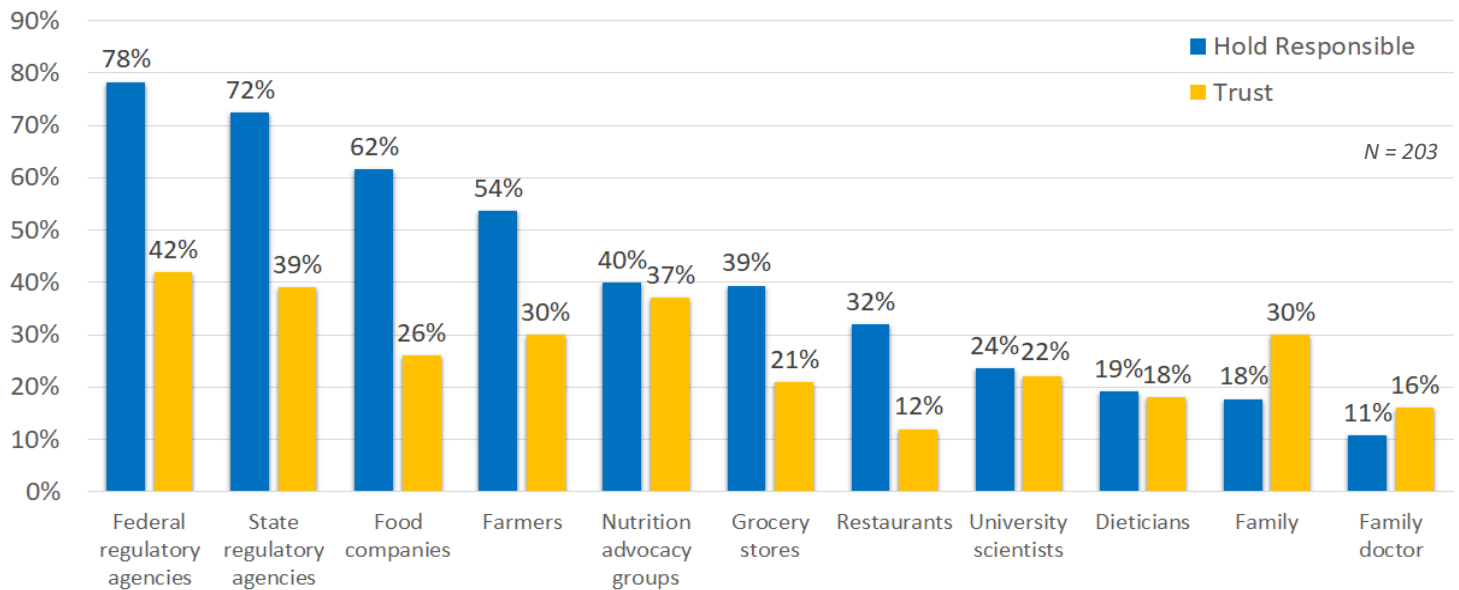


Interestingly, there is a large gap between the extent to which Clean Label Enthusiasts® hold certain entities *responsible* for ensuring safe food, and the extent to which they *trust* those entities to ensure safe food. Three quarters of CLE believe that federal and state regulatory agencies are responsible for ensuring safe food, but less than half of CLE actually trust those agencies to ensure safe food. Among non-CLE, the gaps for federal and state regulatory agencies are not nearly as large; the gap within the CLE appears to be driven by the fact that CLE are generally more distrustful of federal and state agencies. Another important finding is that over a third of both CLE *and* non-CLE hold food companies responsible for ensuring safe food, but do not trust them to do so. These results have important implications for food companies, as they suggest that such companies must work to improve perceptions of their trustworthiness among both Clean Label Enthusiasts and the general public.

## Non-CLE – Hold Responsible vs. Trust

# Clean Label Interest

## Why are you interested in Clean Label?



*N = 203*

Bar chart values:
- I am worried about my health: 61%
- I distrust food manufacturers: 53%
- I am worried about my family members' health: 46%
- I distrust government regulations: 40%
- I heard/read about it on the news: 22%
- My doctor recommended it: 10%
- I read about it on social media: 10%
- My family told me about it: 7%
- My friends told me about it: 5%
- Other: 8%

"Companies try too hard to conceal what is in our food supply"

"For my own health and family's health/safety."

"How could chemicals in food be of any benefit to human beings?"

The majority of Clean Label Enthusiasts® reported that they were interested in the Clean Label movement because they were worried about their health (61%) or their family members' health (46%). Interestingly, over half reported that they were interested in Clean Label because they distrusted food manufacturers. This is an important finding for food companies and manufacturers, as it shows that Clean Label Enthusiasts' lack of trust in food manufacturing practices is one of the main drivers of their behavior.



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# Implicit Test Methodology

In reading information about sweeteners on the internet, would you believe content from:
**Google Scholar**
with the headline:
**Honey increases blood sugar levels in diabetics**?

**BELIEVE**          **DISBELIEVE**

Context:
➢ Reading information about sweeteners on the internet
➢ 7 sweeteners (honey, sucralose, etc.)

Headlines about sweeteners:
➢ Positive or negative
➢ True (science-based) or false (not science-based)
➢ 28 headlines

Source of headline:
➢ WebMD, Food Babe, etc.
➢ 14 sources

We put Clean Label Enthusiasts® in the context of reading information about sweeteners on the internet. We then showed them a series of news headlines about sweeteners (e.g., "Stevia reduces the presence of beneficial gut bacteria") and attributed each headline to a particular source (e.g., WebMD). The specific source that each headline was attributed to was varied for each participant: one participant might see that the headline "Stevia reduces the presence of beneficial gut bacteria" came from WebMD, while another participant might see that same headline as coming from Food Navigator.

The headlines varied in whether they made a positive statement (e.g., "Honey lowers bad cholesterol and raises good cholesterol") or a negative statement (e.g., "Stevia reduces the presence of beneficial gut bacteria") about the sweetener in question. The headlines also varied in whether they were true (i.e., based on scientific evidence) or false (i.e., not based on scientific evidence).

Each participant was asked to select "Believe" or "Disbelieve" for each source and headline combination; their reaction time was used to calculate an implicit score. Higher implicit scores indicate that participants were most likely to implicitly *believe* a source/headline combination, while lower implicit scores indicate that participants were most likely to implicitly *disbelieve* a source/headline combination.
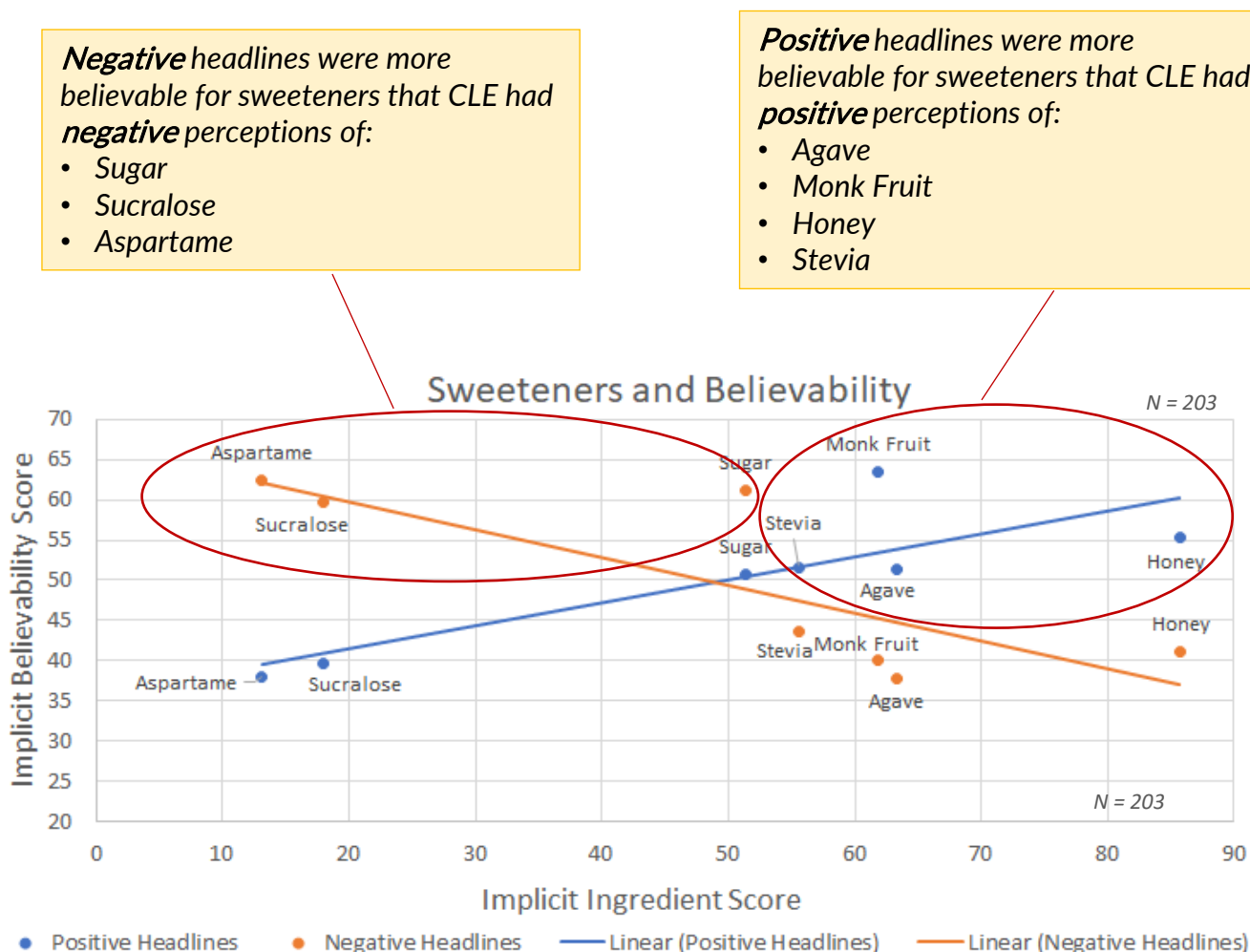
# Implicit Test Results: Headlines

Using the methodology described on the previous page, we found that CLE were equally likely to believe both positive and negative headlines. However, this differed depending on the specific sweetener: negative stories were more believable for some sweeteners (e.g., aspartame) than for others (e.g., honey).

These results fit with other studies that InsightsNow has carried out on perceptions of various ingredients:
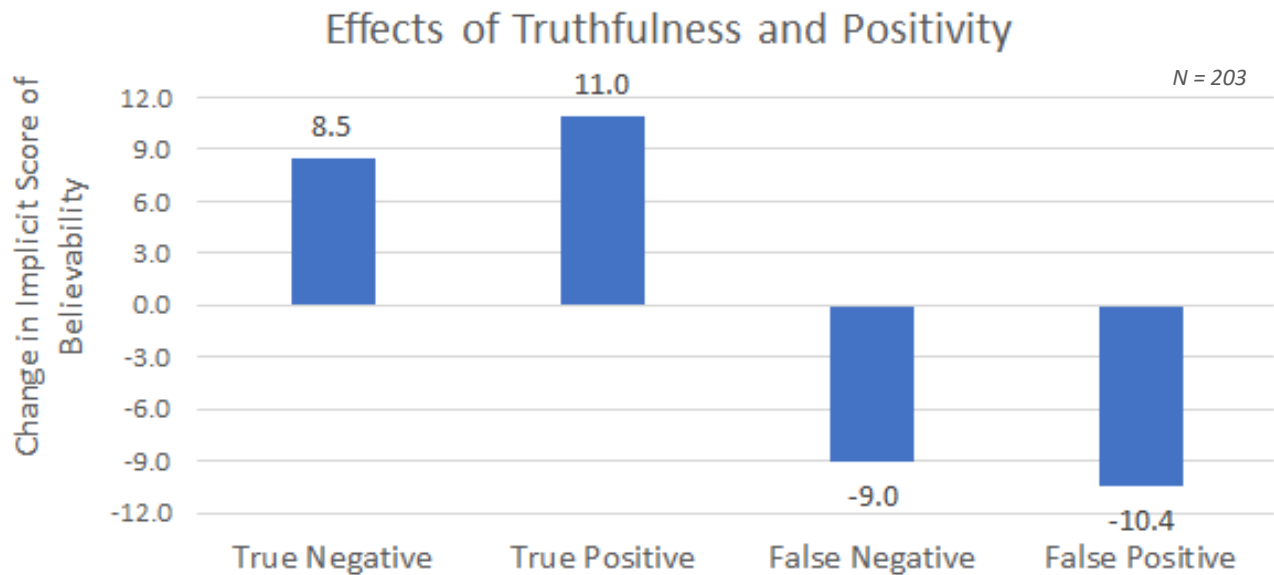
❖ For sweeteners that had low implicit scores in our other ingredient studies, positive headlines were less believable and negative headlines were more believable. (A low implicit score means that individuals have negative perceptions of a particular sweetener.)

❖ For sweeteners that had high scores in our other ingredient studies, the opposite was true: positive headlines were more believable and negative headlines were less believable.

This information is relevant for food and ingredient companies, as it provides evidence that CLE are more willing to believe negative information about sweeteners they perceive to be "bad", such as aspartame. More broadly, this data shows that individuals' willingness to trust is biased by their existing perceptions: they are more likely to believe a statement when it aligns with their current beliefs.

*Negative headlines were more believable for sweeteners that CLE had negative perceptions of:*
- *Sugar*
- *Sucralose*
- *Aspartame*

*Positive headlines were more believable for sweeteners that CLE had positive perceptions of:*
- *Agave*
- *Monk Fruit*
- *Honey*
- *Stevia*



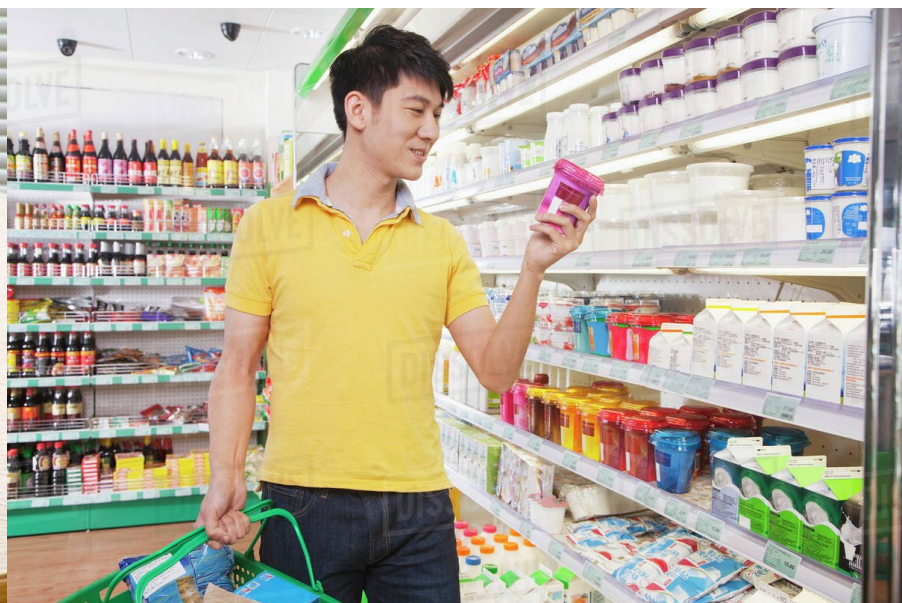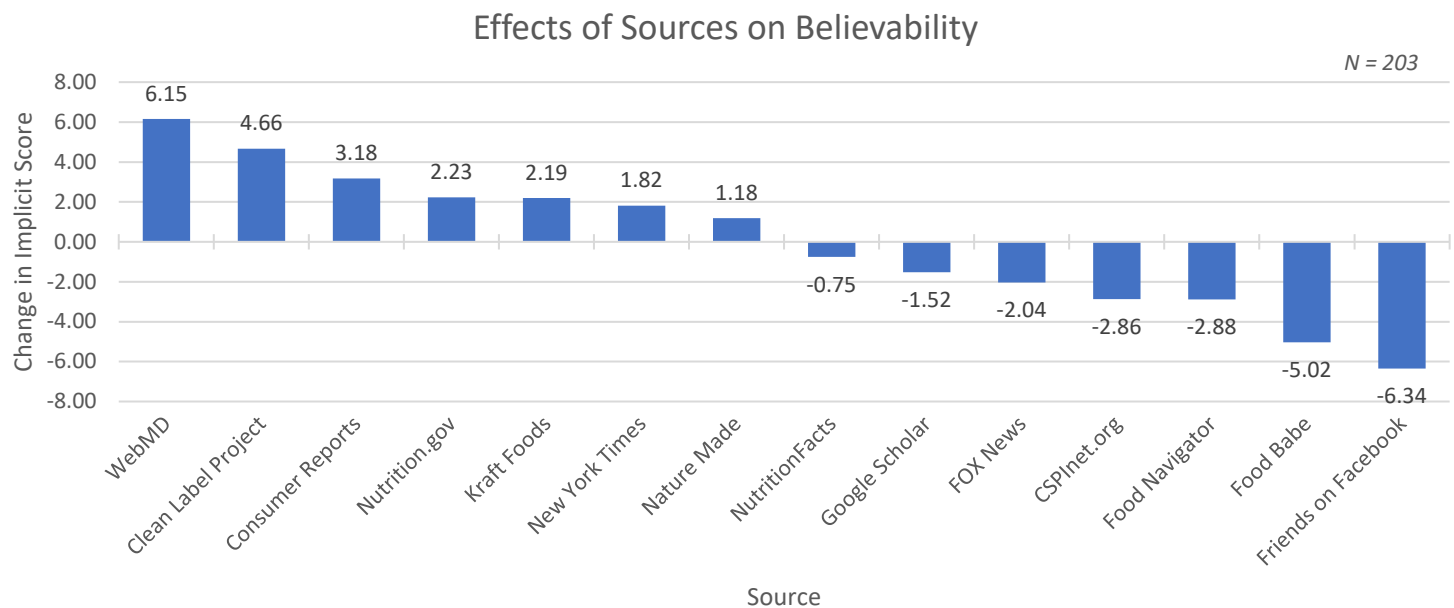*Sweeteners and Believability*

N = 203

# Implicit Test Results: Headlines

Another interesting result is that CLE were more likely to believe headlines that were true (i.e., based on scientific evidence), compared to headlines that were false (i.e., not based on scientific evidence). This is an important finding because it suggests that CLE are familiar with the science of sweeteners. Food companies and manufacturers who hope to appeal to the CLE segment could try to influence their beliefs by promoting scientific studies in the media.

## Effects of Truthfulness and Positivity

N = 203



Bar chart — Change in Implicit Score of Believability:
- True Negative: 8.5
- True Positive: 11.0
- False Negative: -9.0
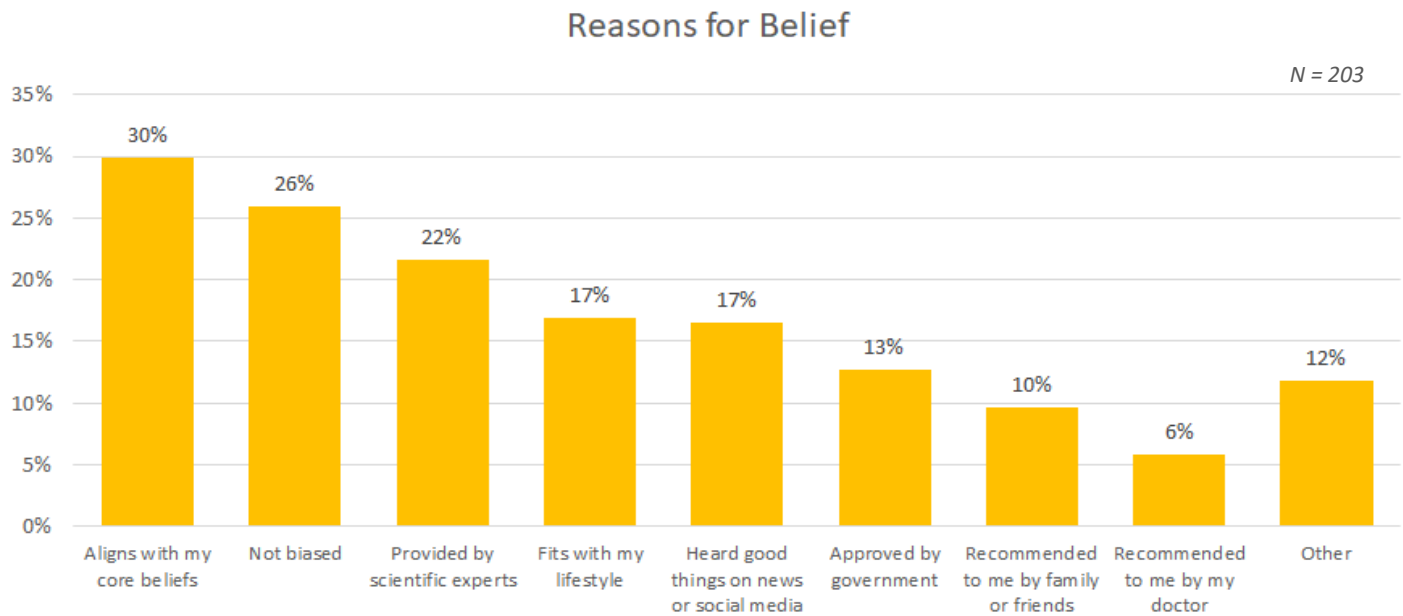- False Positive: -10.4

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# Implicit Test Results: Sources

When it came to sources, WebMD had the highest implicit belief score, followed by Clean Label Project, Consumer Reports, and the New York Times. Food Babe and friends on Facebook scored the lowest. These results show that social media word-of-mouth may not matter as much to Clean Label Enthusiasts® as what they perceive to be objective scientific evidence that comes from reputable sources such as WebMD and the New York Times. This finding is important to food and ingredient companies, as it suggests that the product information that CLE are most likely to take seriously comes from sources that are perceived to be more scientific and evidence-based.

### Effects of Sources on Believability

N = 203

| Source | Change in Implicit Score |
|---|---|
| WebMD | 6.15 |
| Clean Label Project | 4.66 |
| Consumer Reports | 3.18 |
| Nutrition.gov | 2.23 |
| Kraft Foods | 2.19 |
| New York Times | 1.82 |
| Nature Made | 1.18 |
| NutritionFacts | -0.75 |
| Google Scholar | -1.52 |
| FOX News | -2.04 |
| CSPInet.org | -2.86 |
| Food Navigator | -2.88 |
| Food Babe | -5.02 |
| Friends on Facebook | -6.34 |

# Reasons for Belief vs. Disbelief
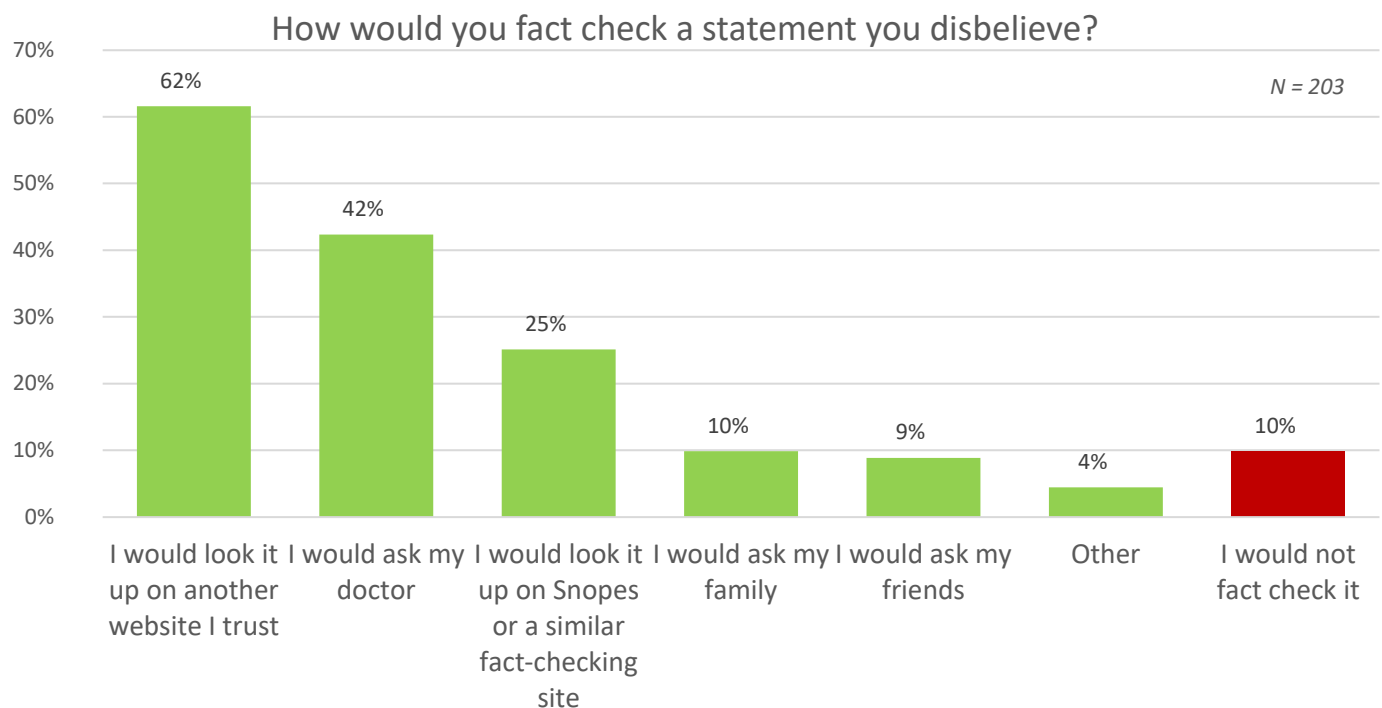
## Reasons for Belief

*N = 203*



Clean Label Enthusiasts® most often believed news headlines or sources about sweeteners because the content aligned with their core beliefs (30%), the source was not biased (26%), or the content was provided by scientific experts (22%). On the other hand, CLE most often disbelieved news headlines or sources about sweeteners because the content was not provided by scientific experts (32%), the content did not align with their core beliefs (28%), or the source was biased (21%). These results align with the insights from the implicit test described earlier: when deciding whether to believe content they encounter, CLE will carefully consider how that content fits with their core beliefs, as well as whether it appears to be scientific and unbiased.

## Reasons for Disbelief

*N = 203*
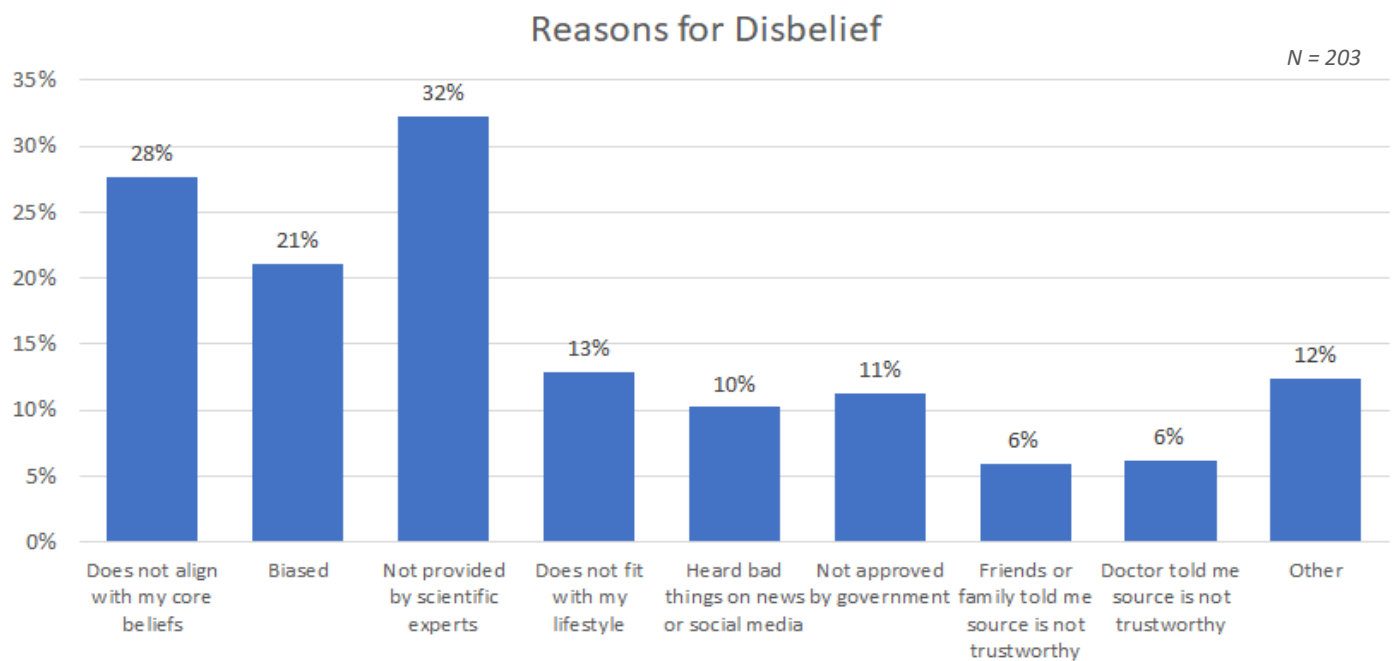
# Fact Checking

Upon reading a statement they disbelieved, only 10% of Clean Label Enthusiasts® reported that they would *not* fact check it. This finding supports the notion that CLE are generally suspicious of food-related information they encounter and seek to do more research when they encounter something they disbelieve. The majority of participants (62%) reported that they would fact check by looking it up on another website that they trust; very few said that they would fact check by asking family (10%) or friends (9%). This result suggests that food companies need to be aware of the information that is available about them online—in particular, the information that is available on the sites that Clean Label Enthusiasts trust, as CLE will often go to these sites to decide on the veracity of food-related statements they encounter.

### How would you fact check a statement you disbelieve?

N = 203

| Category | Percentage |
|---|---|
| I would look it up on another website I trust | 62% |
| I would ask my doctor | 42% |
| I would look it up on Snopes or a similar fact-checking site | 25% |
| I would ask my family | 10% |
| I would ask my friends | 9% |
| Other | 4% |
| I would not fact check it | 10% |

*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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