

Clean Label Research Community Behavior Report: Free-From Forecasts and Resolutions



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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 February 2019 report, Hopes, Dreams and 2019 Resolutions of Clean Label Enthusiasts.

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Hopes, Dreams and 2019 Resolutions of Clean Label Enthusiasts®

Overview:

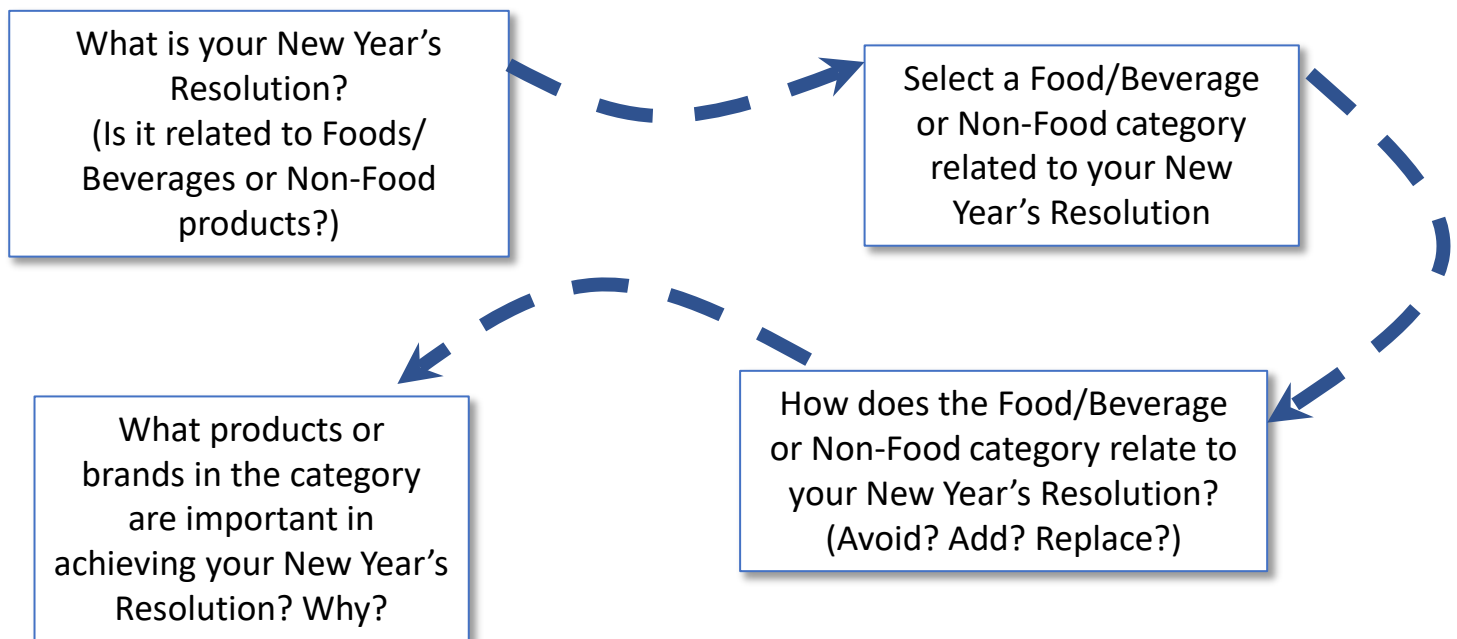
Clean Label Enthusiasts (CLE) are a behavioral segment, differentiated by their attitudes and avoidances of products with artificial ingredients and other additives that they believe are unhealthy. They tend to read ingredient labels and avoid brands due to these concerns.

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:

203 members of the InsightsNow Clean Label Enthusiasts community completed an online questionnaire regarding New Year’s Resolutions for food and non-foods in January 2019.

Respondents were asked about their New Year’s Resolutions for 2019:



Hopes, Dreams and 2019 Resolutions of Clean Label Enthusiasts®

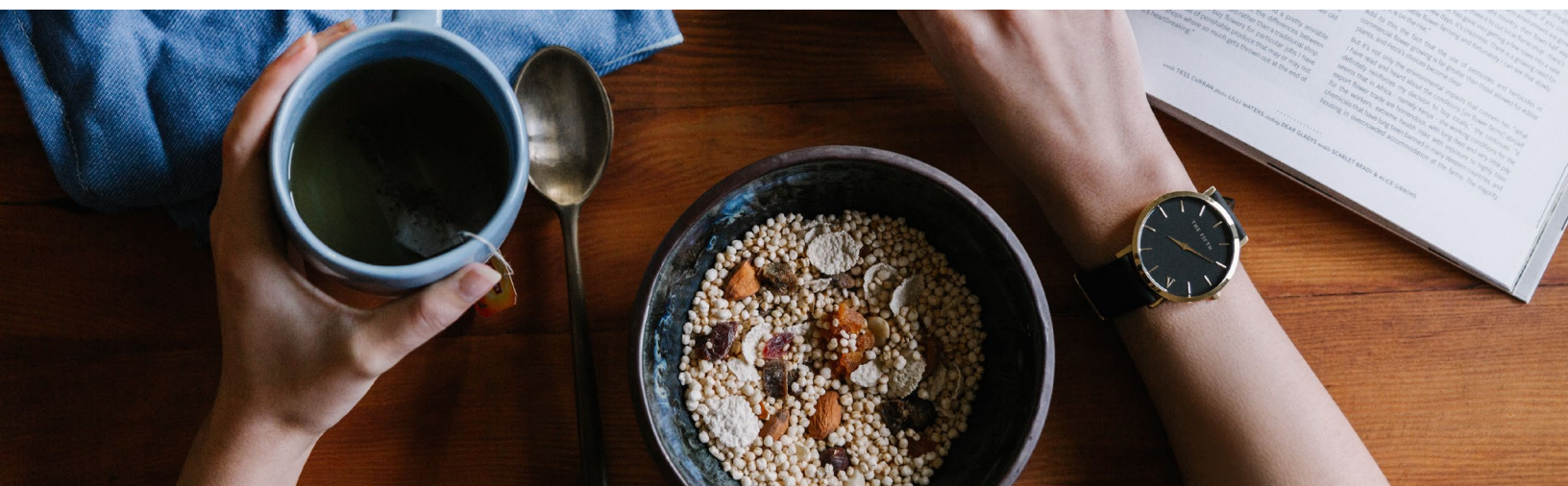
Conclusions:

Opportunities for Food and Beverage Companies

- Seek more opportunities for hydration – Clean and pure beverages such as water
- Seek healthier beverage alternatives – Smoothies, juices, and teas
- Seek fresh fruits and vegetables
- Seek less alternative snacking options
- Seek less sugar and sweets

Opportunities for Non-Food Companies

- Seek oral care alternatives – Natural toothpaste
- Seek skin care alternatives – Natural body lotions
- Seek hair care alternatives – Chemical and cruelty free coloring, shampoos
- Seek home cleaning alternatives – Safer cleaners



New Year's Resolutions of Clean Label Enthusiasts®

61% made a New Year's Resolution specifically related to foods or beverages in 2019, compared to 67% in 2018.

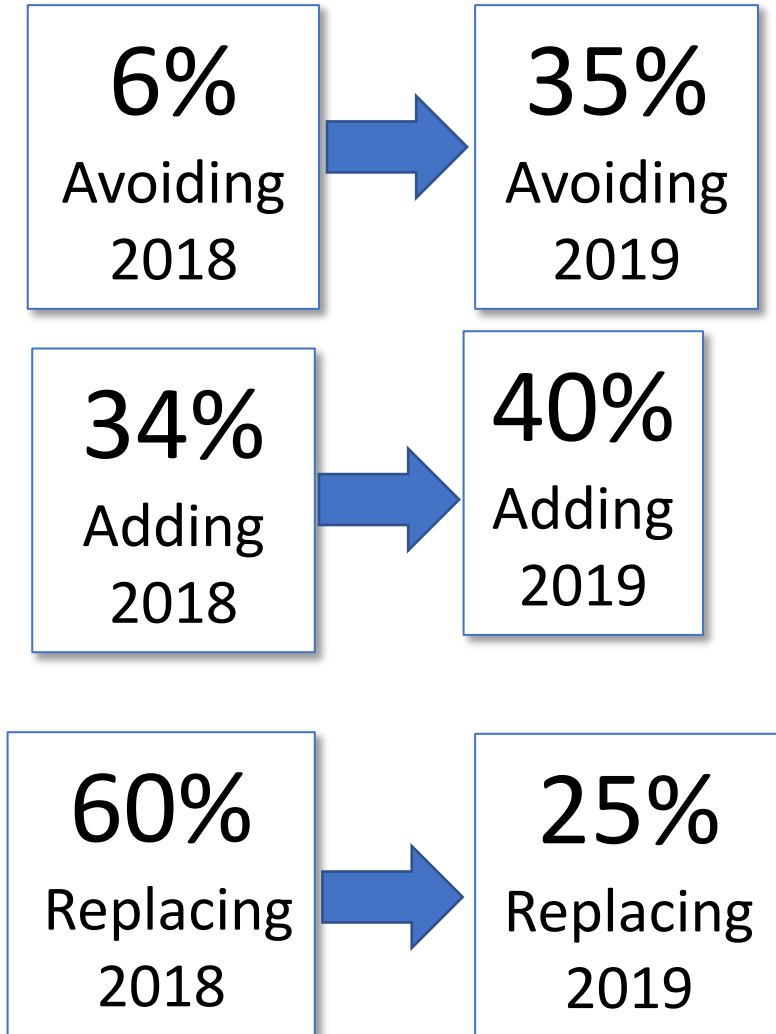
28% made a New Year's Resolution specifically related to non-food products (e.g., hair care)

Respondents were asked to relate their most important resolution to a food category (24 choices) or non-food category (6 choices).



New Year's Resolutions of Clean Label Enthusiasts®

Food and Beverage Strategies



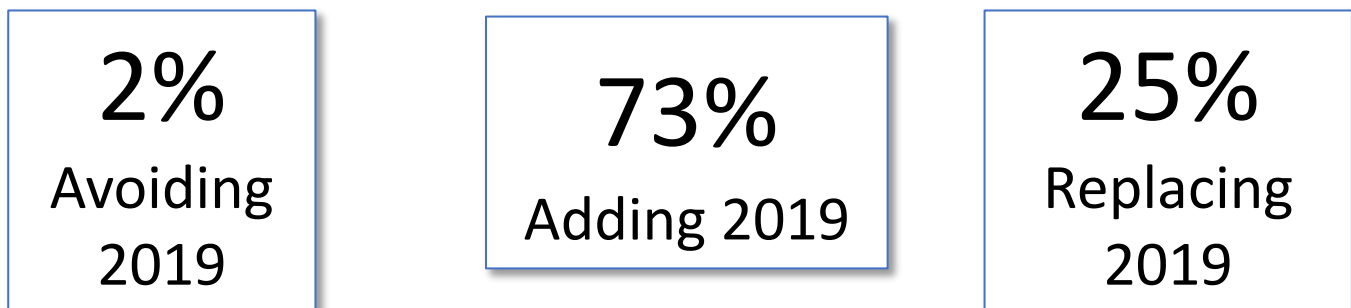
Responses were classified as either:

- Avoid
- Adding
- Replacing

Note the jump in avoidance and the drop in replacing.



Non-Food Strategies



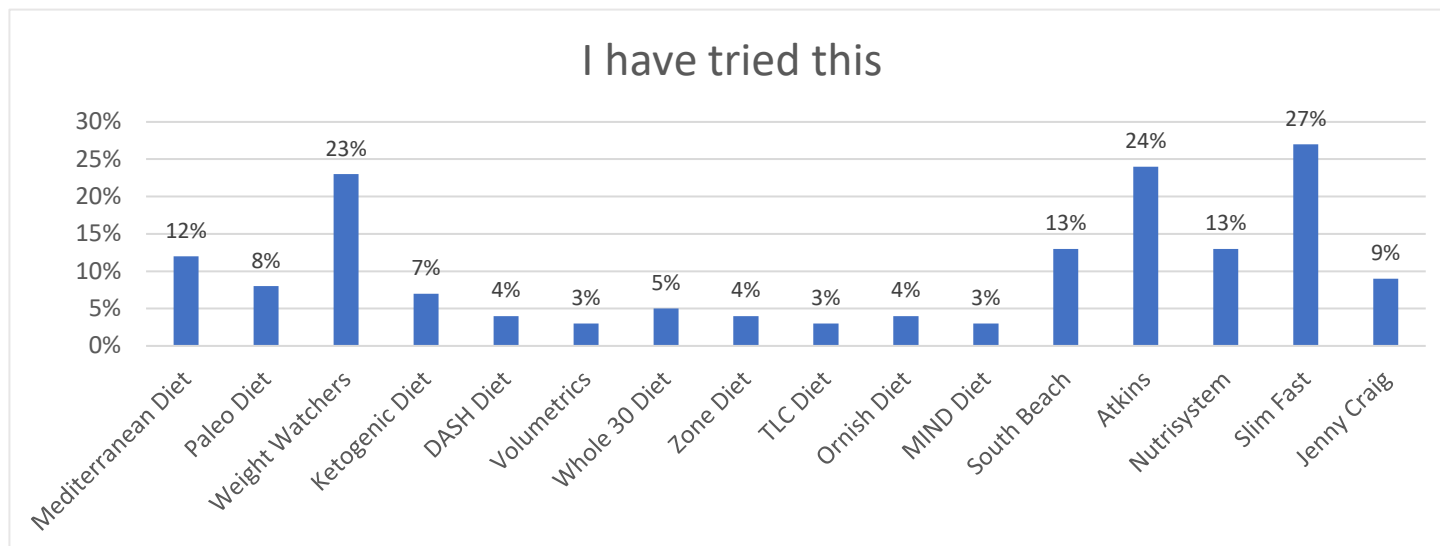
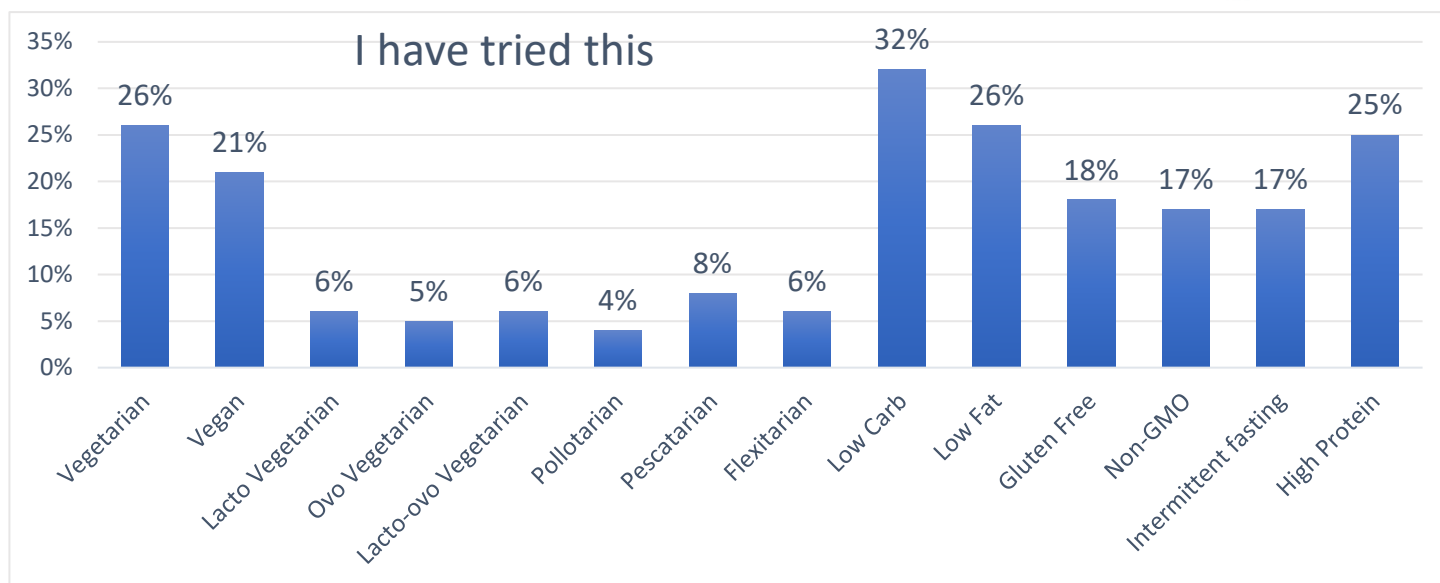
Lifestyle and Diets within the Clean Label Enthusiasts

Dieting trends and tryouts among CLE

Low Carb eating is the most popular, with almost 1/3 of respondents indicating that they have tried It.

Even though Jenny Craig has the most recognition for diets, a scant 9% have actually tried it.

Slim Fast (which has been around for over 40 years) was the most tried of all of the options, followed by Atkins and Weight Watchers.

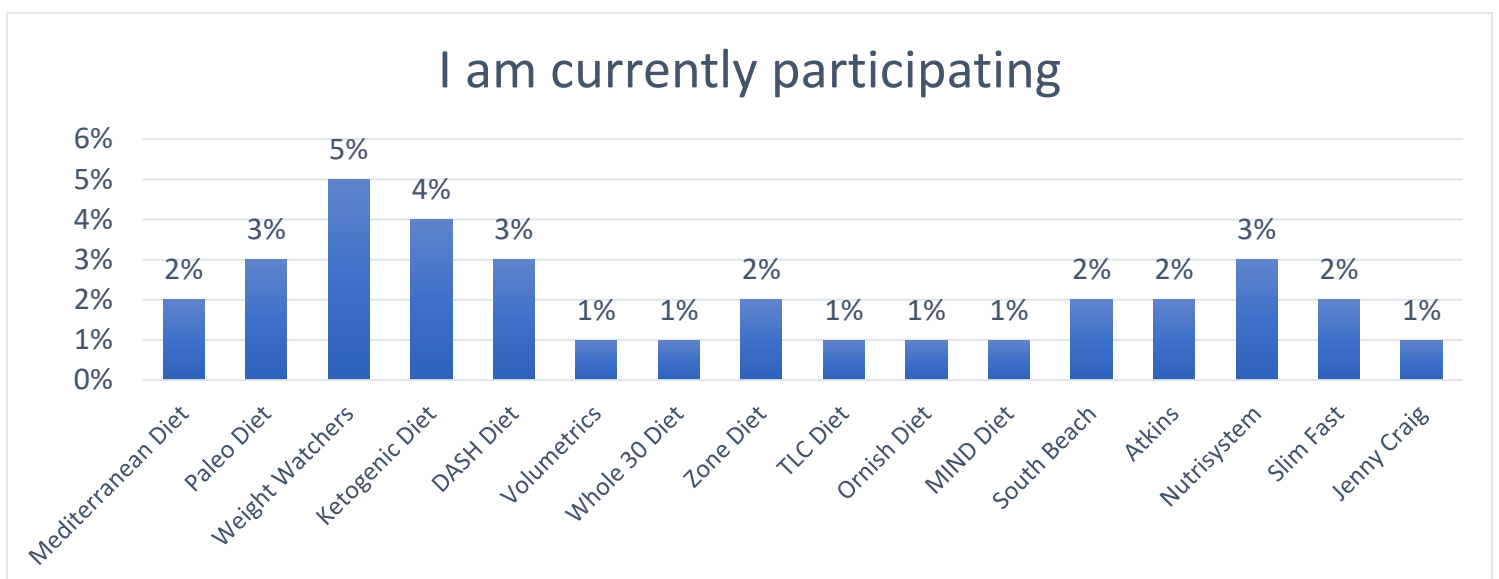
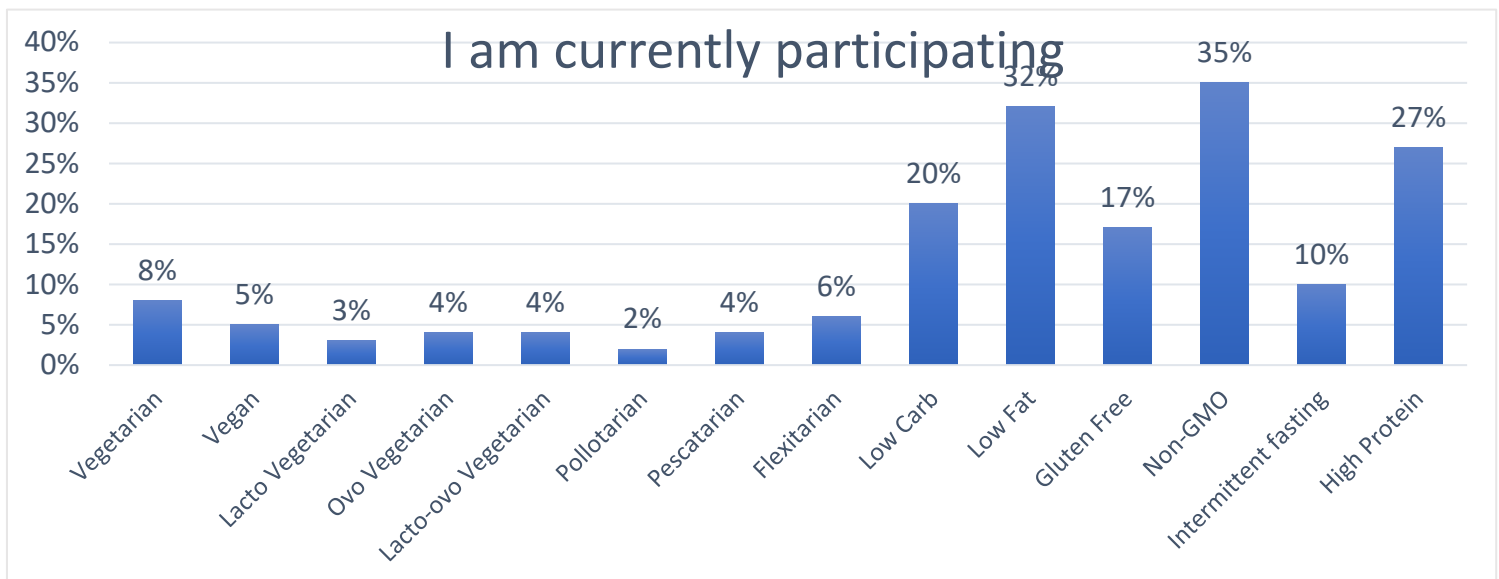
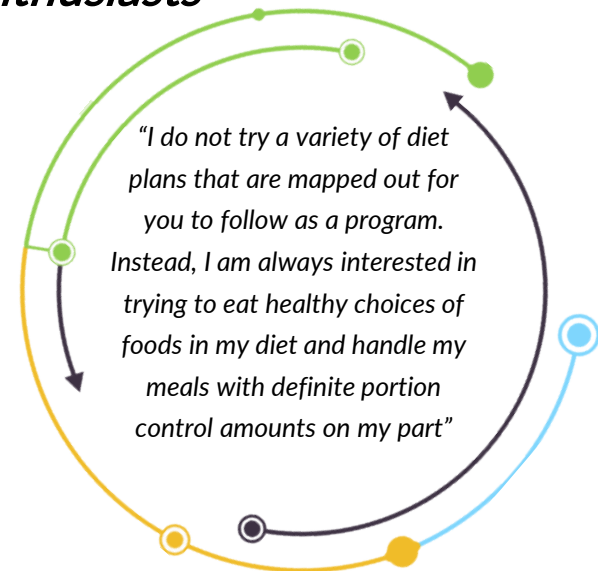


Lifestyle and Diets within the Clean Label Enthusiasts®

Current Diet Participation

CLE members that participated in this study were most frequently participating in non-GMO followed closely by low fat. Some participated in combinations of lifestyle choices.

The percentage of respondents participating in diets was much lower than the lifestyle choices, with only 5% participating in Weight Watchers which was the highest of the weight loss diets.

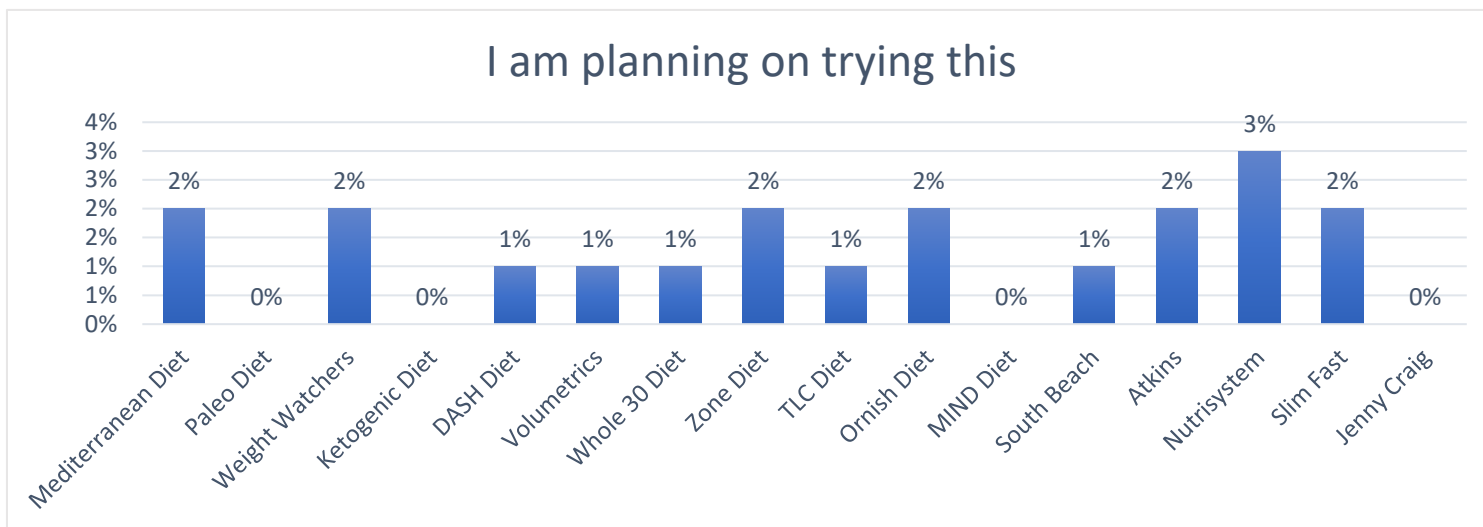
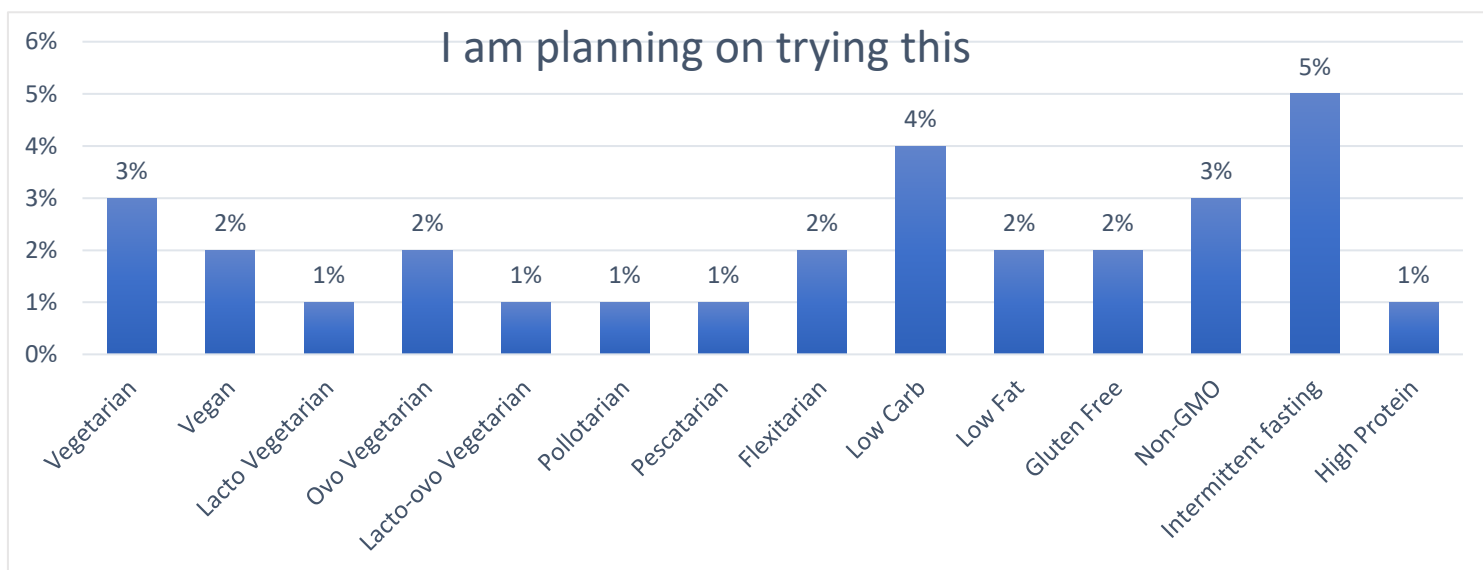


Lifestyle and Diets within the Clean Label Enthusiasts®

Planned Diet Participation

The number of CLE that were planning on participating in a lifestyle or diet was very low. This indicates that CLE members have already adopted a lifestyle of being concerned and in tune with their health and diet.

Interestingly, the Keto diet was the top trending diet search according to Google Trends (<https://trends.google.com/trends/yis/2018/US>) but had little to no interest from the CLE community.



Lifestyle and Diets within the Clean Label Enthusiasts®



Specific Lifestyle: Gluten Free

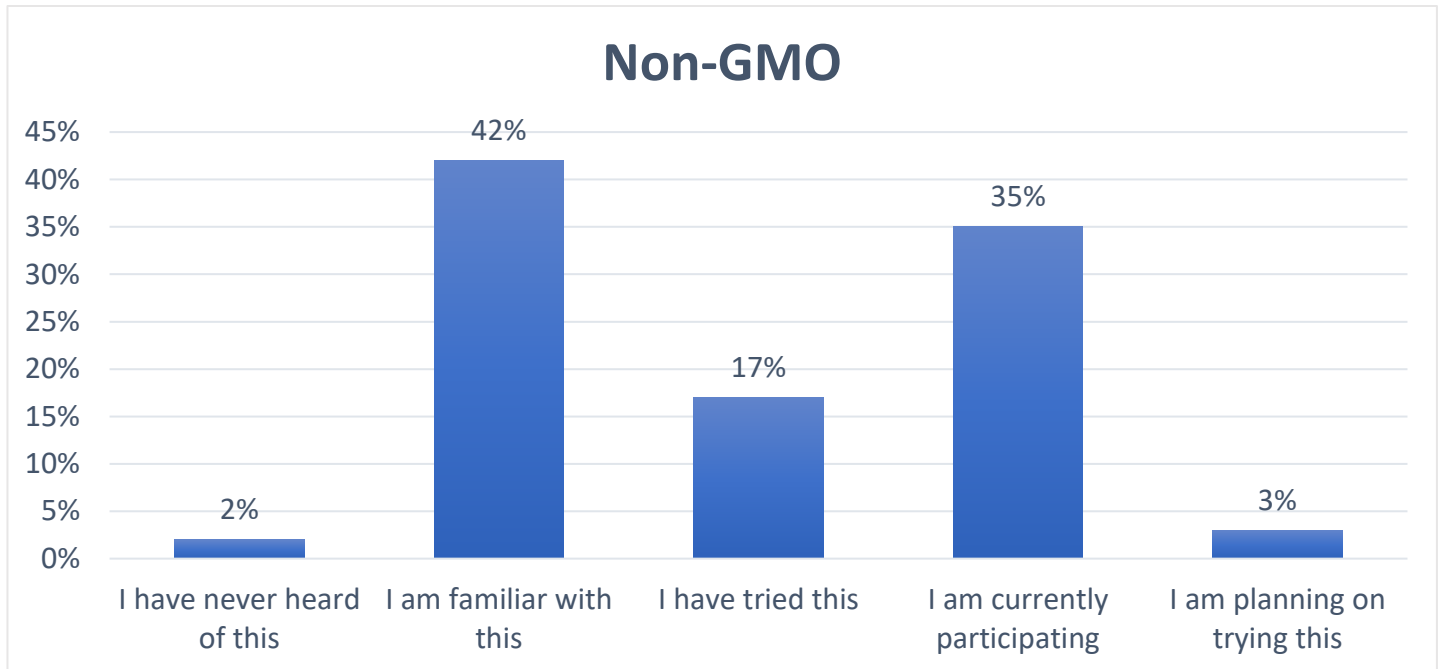
Looking at just this lifestyle, gluten free was one of the highest scoring as far as familiarity. When it comes to those currently participating, numbers drop to 17%, and 18% have tried it at some point. This reinforces our previous findings that gluten free influences only 20% of CLE (Clean Label Community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



Lifestyle and Diets within the Clean Label Enthusiasts®

Specific Lifestyle: Non-GMO

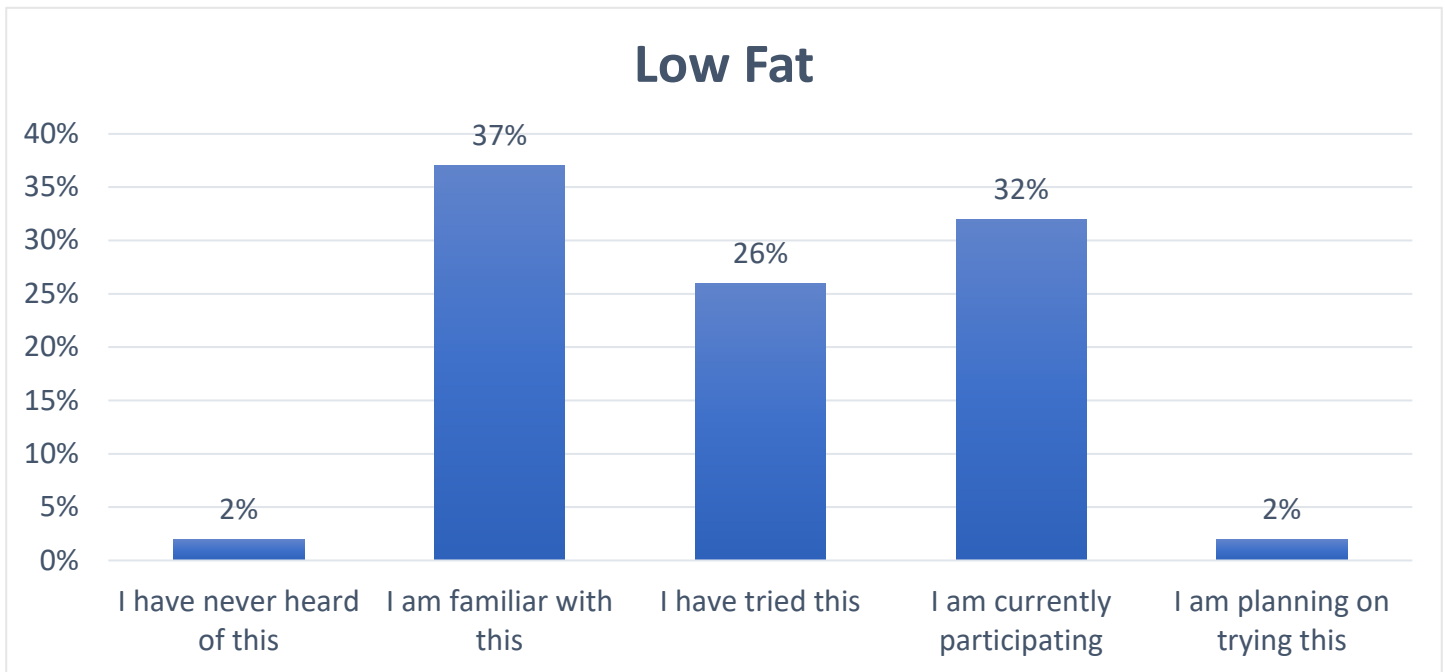
Non-GMO was the highest scoring lifestyle choice as far as currently participating, and familiarity was high as well. When looking at previous research (below), this closely supports our findings that non-GMO influences about 40% of CLE (Clean Label Community Food Behavior Report Q4 2017).



Lifestyle and Diets within the Clean Label Enthusiasts®

Specific Lifestyle: Low Fat

Low fat was a lifestyle choice for nearly 1/3 of respondents 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 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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