

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



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 June 2019 report: **Clean Label Enthusiasts® & Packaging – Part 2**.

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# Clean Label Enthusiasts® & Packaging – Part 2

## 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 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:

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 an Implicit/Explicit Test™ that focused on perceptions of various types of food packaging (e.g., aluminum cans, glass jars, plastic coffee pods, and paper egg cartons).





## Summary of What We Learned

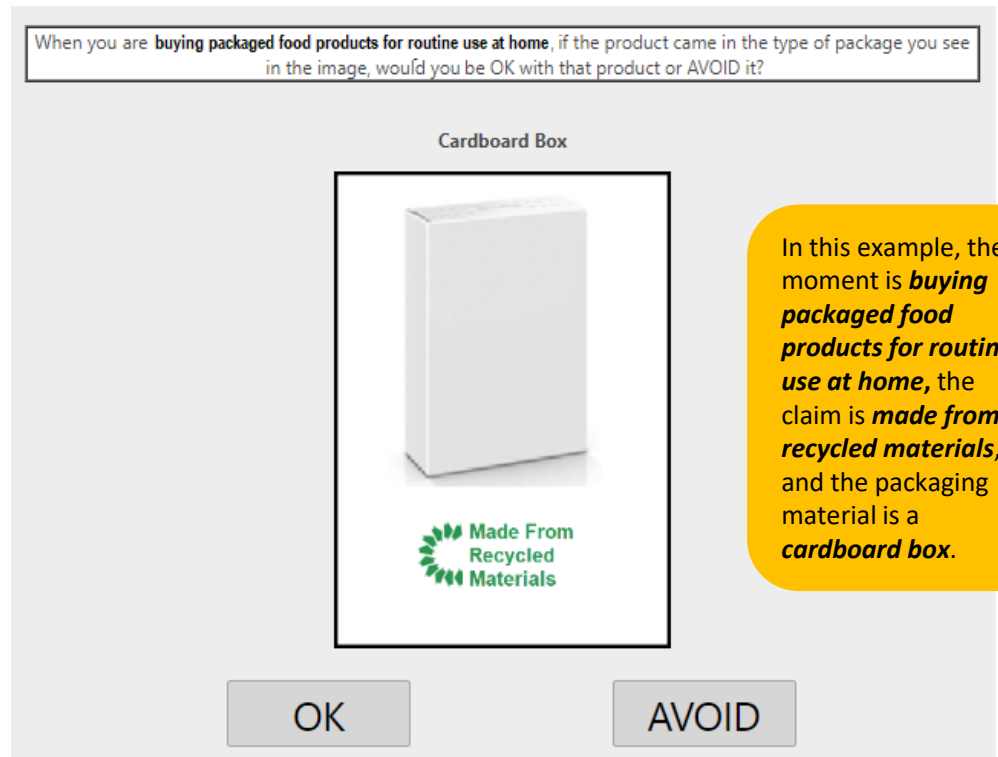
- ✓ Freshness is a must have that consumers are not willing to trade away for other packaging benefits. The majority of participants valued **freshness**, and would choose less convenient packaging, plastic packaging, and even non-recyclable/compostable packaging over packaging in which **the contents might get stale**.
- ✓ Gaps between CLE and Non-CLE shoppers are a leading indicator of how packaging will motivate choice in the future. This includes:
  - ✓ **Sustainability** and **health concerns** as the primary reasons for accepting packaging materials.
  - ✓ The effectiveness of claims such as **BPA Free** and **Made from Recycled Materials** to motivate choice.
  - ✓ A willingness among consumers to pay more for and trade away **convenience** for **recyclable/compostable** packaging materials.
  - ✓ A willingness among consumers to pay more for **plastic-free** packaging.



# Implicit/Explicit Test™ Methodology

In order to measure CLE and Non-CLE consumers' reactions to various types of packages and packaging claims, we conducted an Implicit/Explicit Test™. In the test, we put respondents into the context of 1 out of 4 consumption moments. Participants were then shown images of various package types. They saw each package type both without a claim and in combination with each of the applicable claims from the list below.

When they saw each image, participants had to select "OK" or "Avoid" as quickly as possible; their choice and reaction time were used to calculate an Implicit/Explicit Test™ score for each package and claim combination. Higher Implicit/Explicit Test™ scores indicate that participants were more likely to implicitly accept a package and claim combination, while lower scores indicate that participants were more likely to implicitly reject it.



## Claims:



## Moments:

- Buying packaged **food** products for **routine use at home**
- Buying packaged **food** products to use while **on the go for convenience**
- Buying packaged **beverages** for **routine use at home**
- Buying packaged **beverages** to use while **on the go for convenience**

## Food packages:

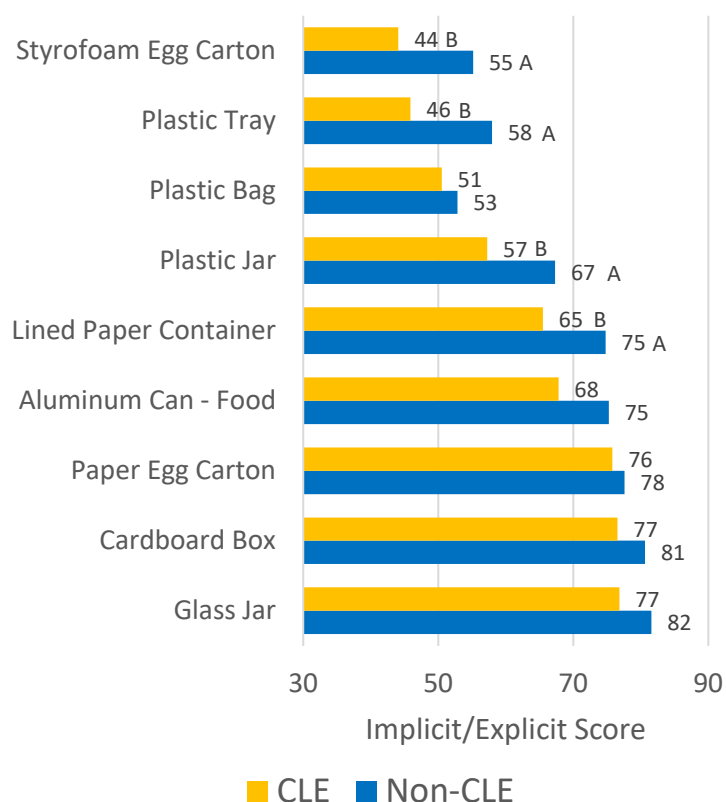
- Cardboard box
- Glass jar
- Plastic bag
- Plastic tray
- Plastic jar
- Styrofoam egg carton
- Paper egg carton
- Lined paper container
- Aluminum can - food

## Beverage packages:

- Glass bottle
- Plastic bottle
- Plastic jug
- Plastic coffee pod
- Foil juice pack
- Lined paper juice box
- Aluminum can - beverage

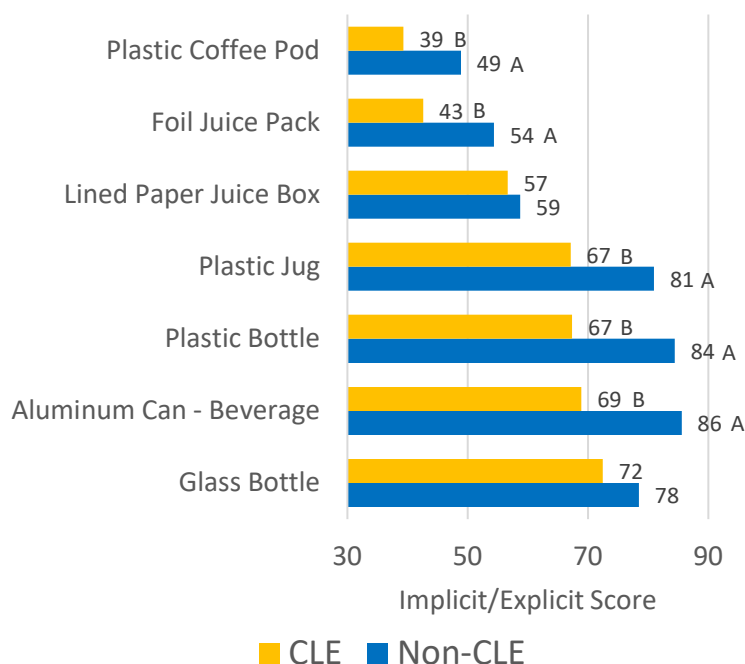
# Implicit/Explicit Test™ Results - Materials

## Food Packaging Materials\*



Clean Label Enthusiasts® had significantly lower Implicit/Explicit Test™ scores than Non-CLE on most food and beverage packaging materials presented without claims. While CLE were less accepting of all packaging types (compared to Non-CLE), they were most accepting of glass jars, cardboard boxes, and paper egg cartons, and least accepting of plastic coffee pods, foil juice packs, and Styrofoam egg cartons. Since CLE are lead consumers, these results imply that consumers will become more critical of food and beverage packaging in the future.

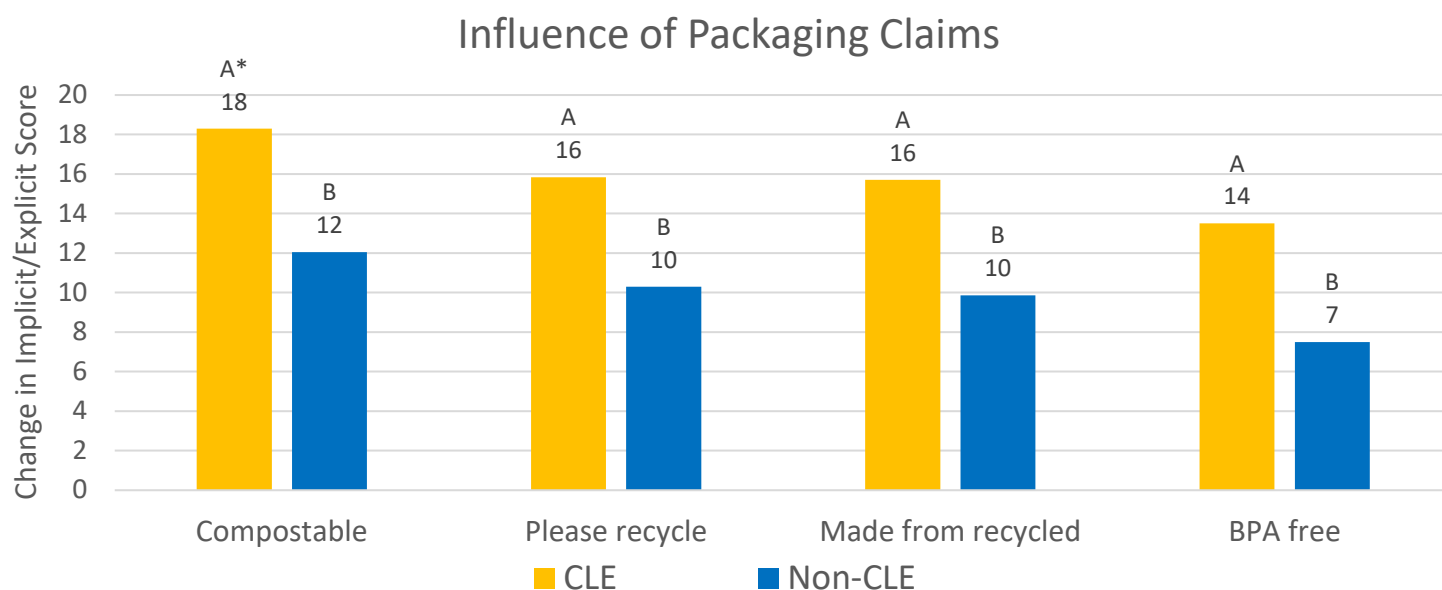
## Beverage Packaging Materials\*



\*Scores for packaging materials when presented without claims; letters indicate significant differences at 95% confidence



# Implicit/Explicit Test™ Results - Claims



Clean Label Enthusiasts® were more responsive to packaging claims: all four of the added claims increased Implicit/Explicit Test™ scores among CLE more than they did among Non-CLE. This provides evidence that CLE care about the sustainability and health impact of their food and beverage packaging.

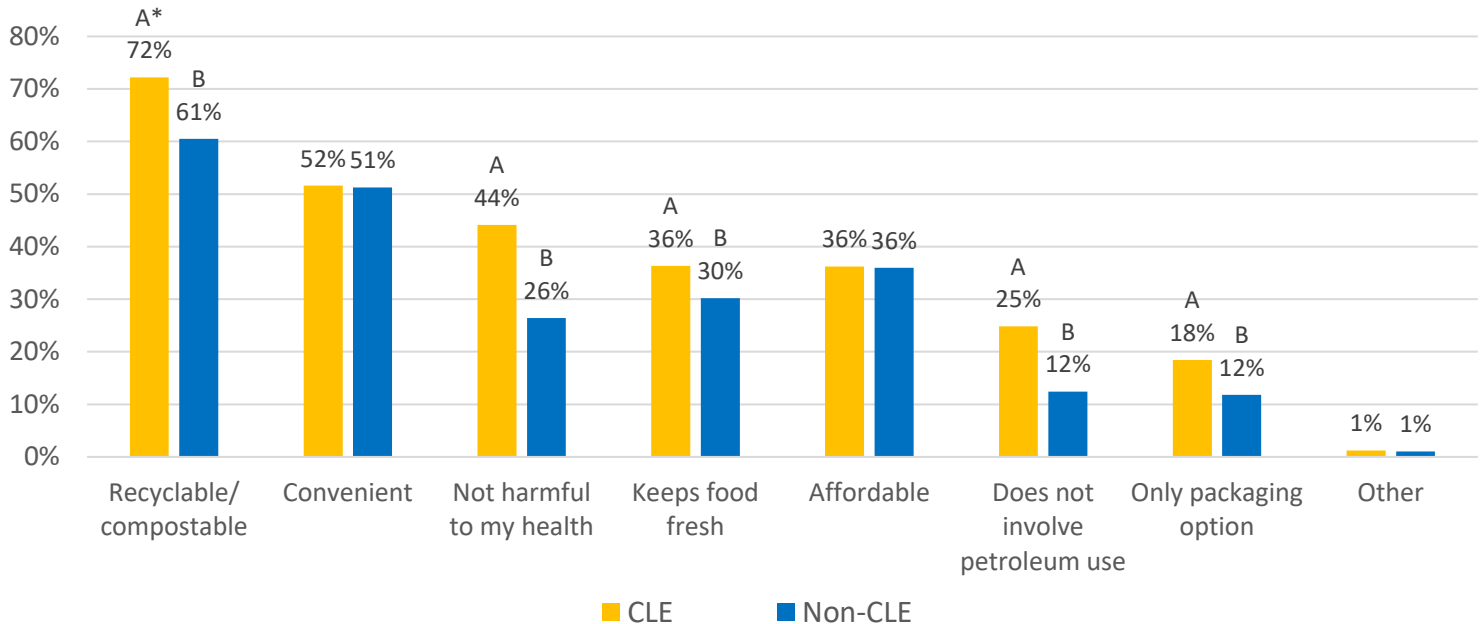
These results show that an important way for packaging companies to forestall negative opinions about their packaging is to include explicit claims on the label that draw attention to the positive aspects of their packaging (e.g., that the package is compostable, recyclable, or BPA free).



*\*Letters in graph indicate significant differences at 95% confidence*

# Reasons for Acceptance of Packaging

Reasons for Acceptance



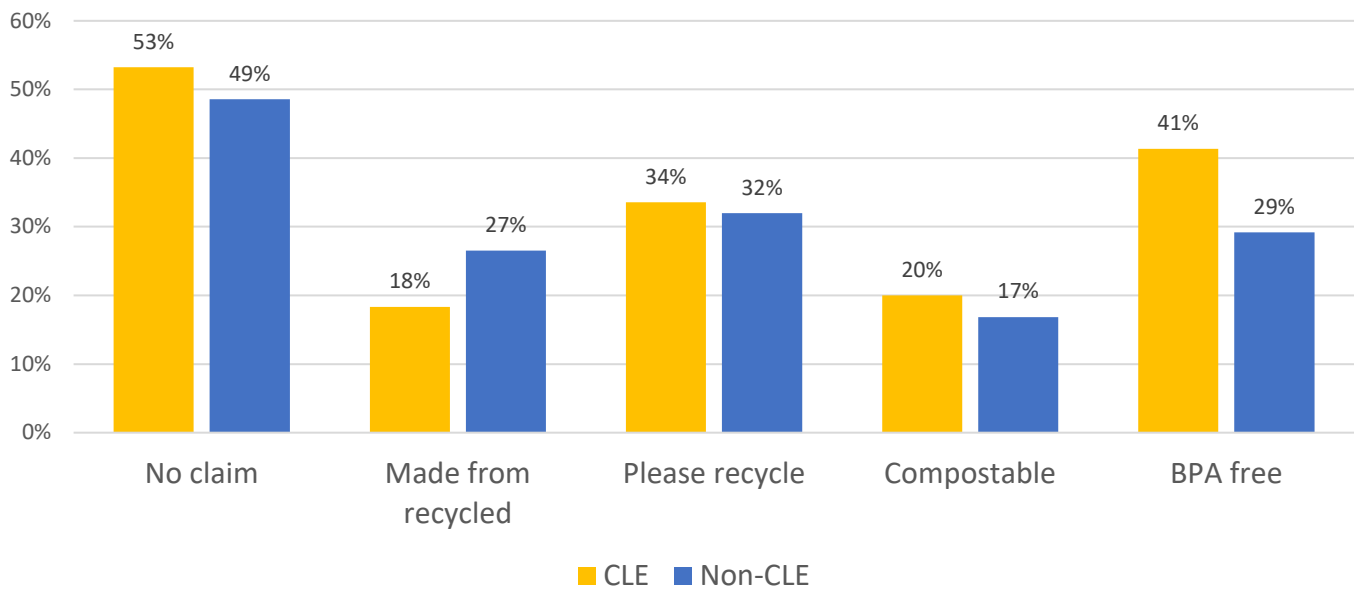
When participants stated that they would be OK with a particular package type and claim combination in the Implicit/Explicit Test™, we asked about their reasons for accepting it. The most common reasons for acceptance in both Clean Label Enthusiasts® and Non-CLE were that packaging is recyclable/compostable, convenient, and not harmful to health. Sustainability and health concerns were more frequently cited as reasons for acceptance in CLE than Non-CLE, suggesting that both of those concerns will grow in importance in the future. Food and beverage companies may wish to focus on improving perceptions of the health and sustainability of the packages that their products come in.





# Reasons for Avoidance of Packaging

## Avoided because it is not recyclable/compostable

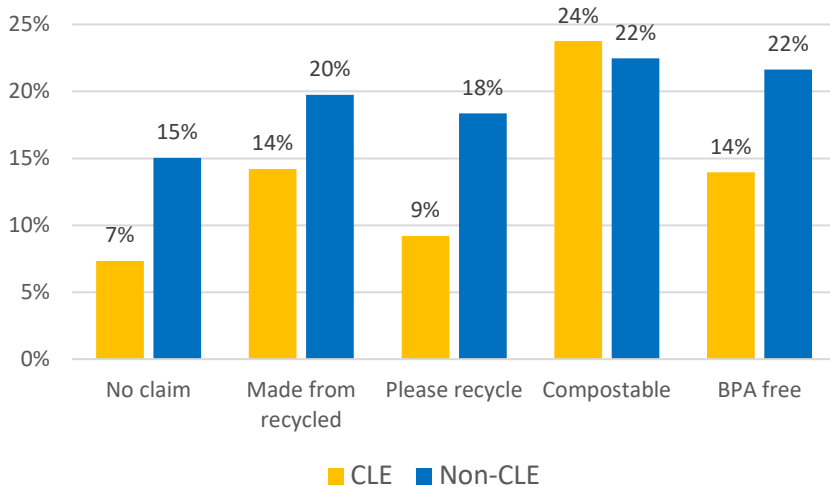


When participants stated that they would avoid a particular package type and claim combination in the Implicit/Explicit Test™, we asked about their reasons for avoiding it. When there was no claim on a package, approximately half of the respondents assumed that the package was not recyclable/compostable, and avoided it as a result. Interestingly, there seemed to be a trust gap with consumers when the claim “Please Recycle” was on a package, with more people still avoiding the package because it was not recyclable/compostable, compared to when a claim like “Made from Recycled Materials” or “Compostable” was made. These results suggest that if a company’s packaging is either made from recycled materials or compostable, they would benefit from placing specific claims on the package to that effect, rather than merely asking consumers to “Please Recycle.”



# Reasons for Avoidance of Packaging

## Avoided because it is expensive

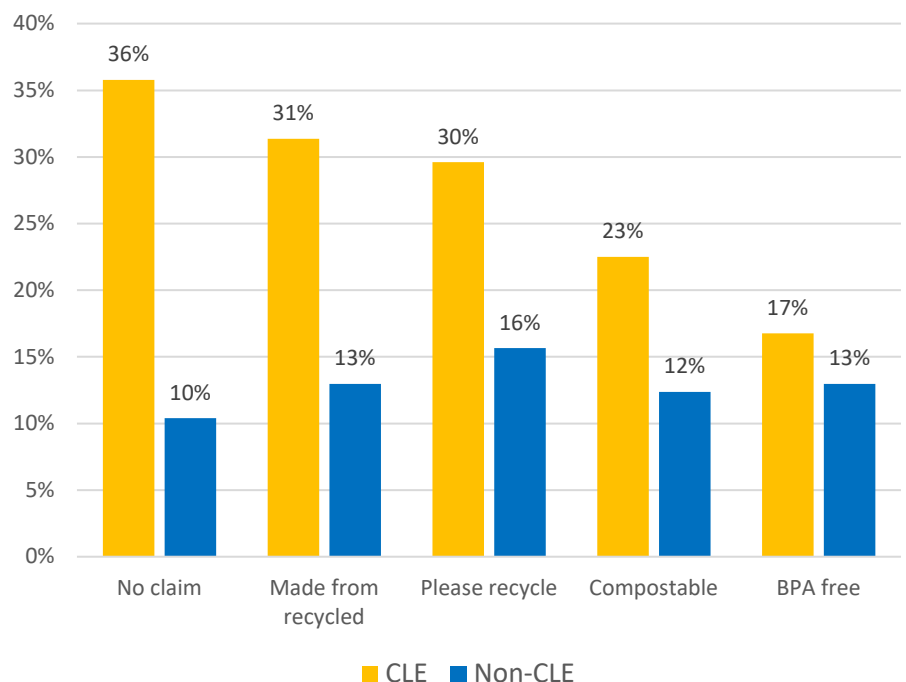


Clean Label Enthusiasts® are less cost-conscious than Non-CLE, and are less likely to avoid packaging because it is expensive (regardless of the claim on the package). However, CLE are just as likely as Non-CLE to avoid compostable packaging because they believe it costs more. Since CLE are lead consumers, this suggests that compostable packaging may struggle in the future because of its higher perceived price.



Clean Label Enthusiasts are very concerned about health: CLE are more likely than Non-CLE to avoid packaging because they believe it is harmful to their health (regardless of the claim on the package). When there is a compostable or BPA-free claim on a package, CLE are less likely to avoid the packaging because it is harmful to their health (compared to other claims or no claim). This implies that consumers in the future are likely to prioritize health, and that companies may benefit from putting health-related claims on their packaging.

## Avoided because it is harmful to health



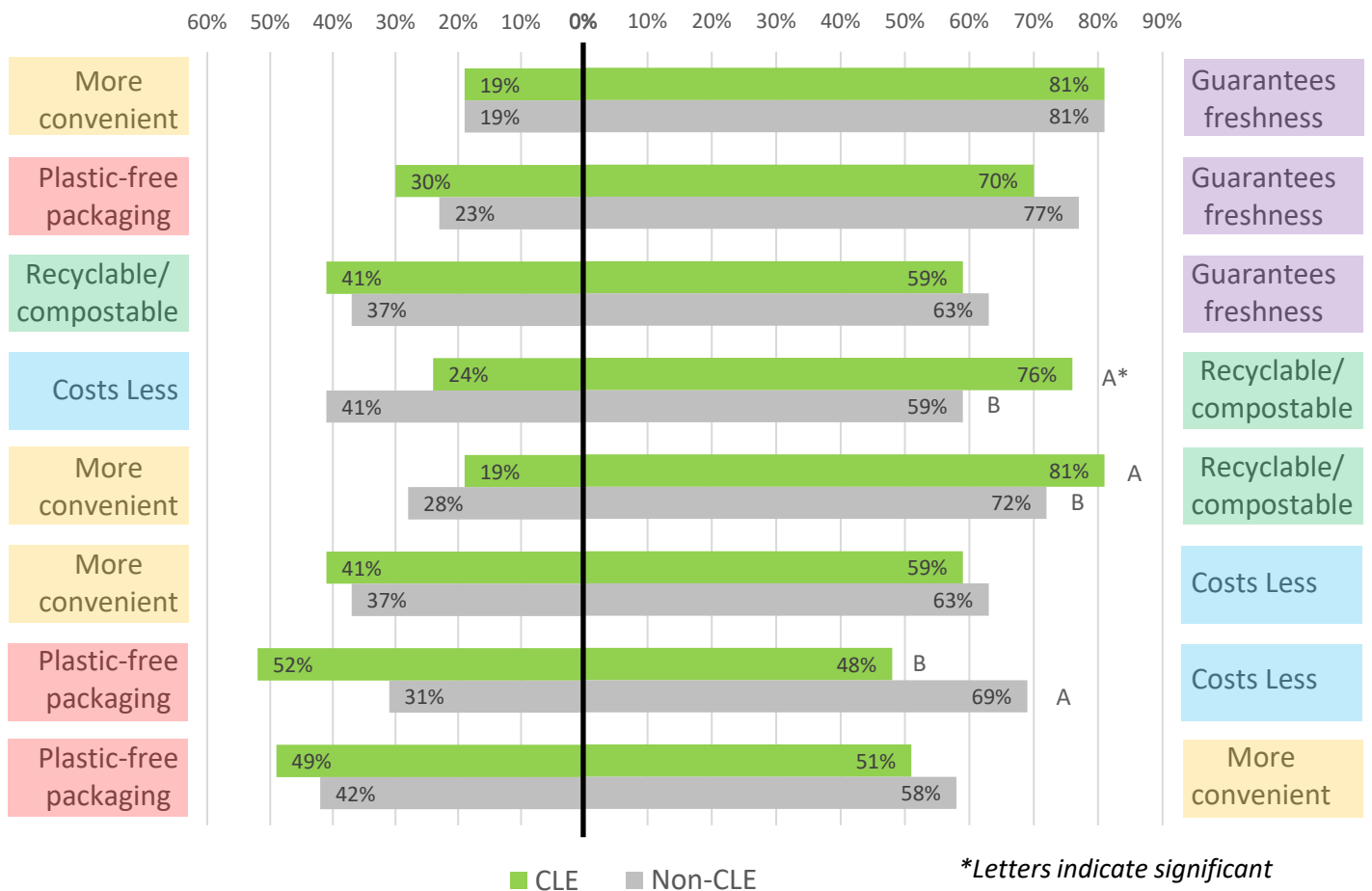
# Tradeoffs

The majority of all participants (both CLE and Non-CLE) valued freshness, and would choose less convenient packaging, plastic packaging, and even non-recyclable/compostable packaging over packaging in which the contents might get stale. Most respondents chose recyclable/compostable packaging over convenient or affordable packaging. More than half of all participants also preferred less convenient packaging that is more affordable.

Clean Label Enthusiasts® were unique in that they were more likely than Non-CLE to choose plastic-free packaging even when it costs more or is less convenient. CLE also valued sustainability: they were more likely than Non-CLE to choose both more expensive and less convenient packaging as long as it is recyclable or compostable. These trends imply that plastic-free, recyclable, and compostable packaging are going to be very important aspects of food and beverage packaging for consumers in the future.



## Which food/beverage packaging benefit would you prefer?





## *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.

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