



SHOPPER PANEL SPOTLIGHT

What's really in consumers' mind in their quest for clean label? To help you understand the motivations and opinions behind purchase behavior, FONA put together a shopper panel. The group spans the spectrum from Clean Savvy to Clean Avoider (visit www.fona.com/clean for details about our clean consumer personas). The group gets regular assignments, and we share our learnings with you!



This week, our shopper panel takes on... NATURAL CLAIMS

SITUATION

We wanted to understand our shoppers' take on clean label claims. We gave them this list of claims and asked about the importance to their purchase.

- All Natural/ 100% Natural
- Free of Artificial Flavors
- Preservative-Free
- Antibiotic-Free
- Gluten Free
- GMO-Free / Non-GMO
- Organic
- No High Fructose Corn Syrup
- Free of Artificial Colors
- Hormone Free
- Allergen Free
- Dairy Free
- Free of MSG

KEY FINDINGS



View food as nourishment and carefully consider the food they eat and feed their family.



Choose to eat healthy most days but like to indulge time to time.

MIDDLE OF THE ROAD, BUT RARELY THE BOTTOM.

Antibiotic/hormone-free trended toward the middle of our consumers' importance list, but none of our consumers listed these claims much lower than halfway down their list.



Aspire to eat healthy but sometimes fall back into their own way of eating.



Food is pleasure. They're aware they could eat healthier, but they're not overly concerned.

(continues on reverse...)

NATURAL CLAIMS continued



ERICA N.

"I do not need things to be organic... just more "natural" and only containing the ingredients necessary."



SARA B.

"Natural and organic claims are very important to my purchases. In regards to organic, I care more about raw fruits and vegetables being organic than processed foods."



ANNE E.

"Non-GMO and Organic are both pretty top for me. Natural claims aren't important to me."



JANET M.

"Natural products appeal more to me than organic claims. Many times organic products are just too expensive... natural products help with overall health and wellness."



JOLENE G.

"I honestly do not worry about organic or natural purchases too much. I focus more on fresh produce and then the nutritional information on packaged food."



ROBIN S.

"I'm not sold on the benefits of organic foods, therefore, it's not much of a factor."

THE TAKEAWAYS

1 Split on claims.

Our consumers were split on which "natural" claims worked for them.

2 For our shoppers, clean label = health.

One universal driver? The reason our shoppers seek natural-related claims is for health & wellness. Our clean label research reveals the same motivations.

All this might leave you with a bit of a challenge. We get it, and we can help.

How do you deliver on label claims, nutrition and taste? What claim appeals to your consumer? FONA's subject matter experts can walk through your options in terms of taste solutions and label implications. Clean label spans the spectrum. **Where does your product fit in?**

Let's talk. Visit us at:
www.fona.com/chat
or call **630-578-8600**



Shopping Cart Check

- ✓ CLEAN SAVVY. LiveGFree Granola: Apple Almond Honey Flavor (Claims of Note: Gluten-free; Non-GMO)
- ✓ CLEAN BALANCER. Nutrigrain Soft-baked Cereal Bar: Blueberry (Claims of Note: Made with real fruit; No HFCS)
- ✓ CLEAN ASPIRATIONAL. Brownberry Health Nut Bread (Claims of Note: No Artificial Colors or Flavors; No HFCS)
- ✓ CLEAN AVOIDER. Merkt's Cheese Spread: Sharp Cheddar (Claims of Note: Made with All Natural Cheese; Never Processed)



CURIOUS ABOUT SOMETHING SPECIFIC?

Our panel can help inform YOUR decisions. Let us know what you'd like us to find out from our shopper panel.

Email LDemme@fona.com and let's dive in!