



NO TO ARTIFICIAL, YES TO FLAVOR: A LOOK AT CLEAN BALANCERS

2018 • TREND INSIGHT REPORT

Out of four personas options, 46% of consumers self-identify as Clean Balancers. We're exploring this group in-depth through detailed analysis and a deep look at their views on specific food ingredients. Though just one group along the "clean continuum," their size means that this group will impact the industry for decades to come. For them, clean label is deeply personal. As their familiarity with the term "clean label" has grown, so too has their passion on the subject. Clean label to them means not only reducing artificial ingredients but also consuming more "better-for-you" ingredients like protein and fiber. Interestingly, our research reveals that natural and organic flavors align perfectly within their needs. Let's dive in.

ABOUT THE CLEAN PERSONAS

In 2016, FONA's clean [research](#) identified what we called the Clean Continuum – there is no “one size fits all” solution when it comes to clean label. Each brand and each consumer sit in a different spot on the continuum. In 2017, we identified four clean label personas based on the results of a nationwide proprietary consumer survey. (See that full report [here](#).) From the “most clean” (Clean Savvy) to the least, (Clean Avoider), we highlighted the seven consumer trends that will shape the future for clean label.

Most recently, we’re sharing some in-depth research into one of those personas – the Clean Balancer. Nearly half (46%) of all consumers in fact self-identify as Clean Balancers. It’s a group that eats healthy whenever possible with room for occasional indulgence. They gravitate towards kitchen-friendly ingredient lists, equate clean label with “health,” and are accepting of natural and organic flavors in the products they buy.

Let’s explore the motivations and behavior of this group. After all, life is all about balance...

About our 2018 Survey

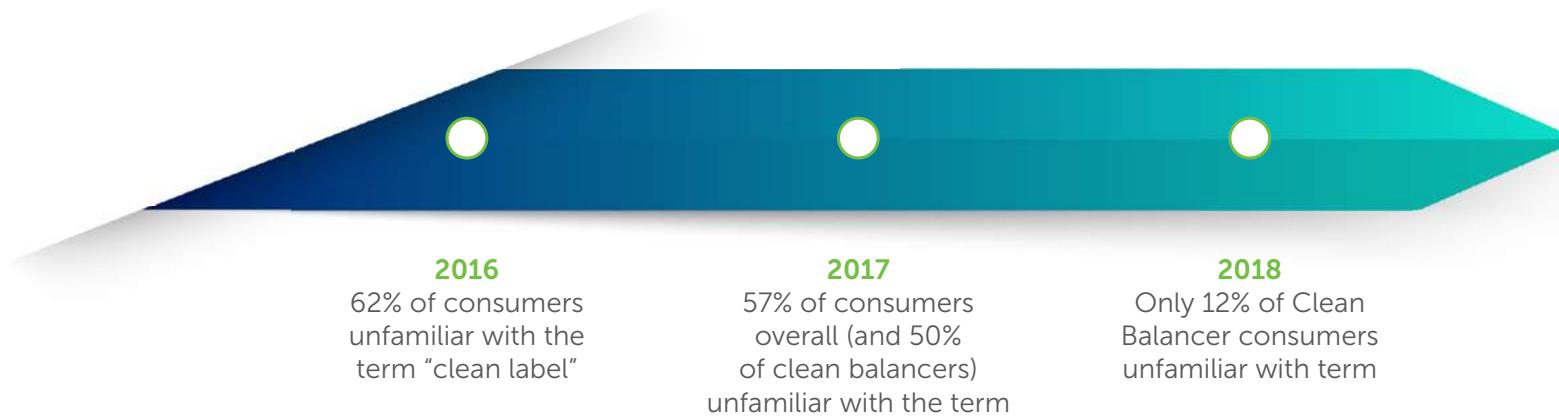
- n = 506
- Geo | Total U.S.
- Age | 18 + Equal Distribution
- Gender | Equal Distribution
- Consumer Target | Those that self-identify as a Clean Balancer



WHAT DOES CLEAN MEAN?

Growing awareness

FONA's been health & wellness drivers for decades. *Clean label* however is a relatively new term and in 2016 we first started asking consumers what "clean label" meant to them. Clearly, consumers (Clean Balancers in particular) have become more familiar with the term over time.



No single definition

We asked Clean Balancers: "As it relates to food and beverage products, please select the description listed below that best fits how you define the term "clean label." →

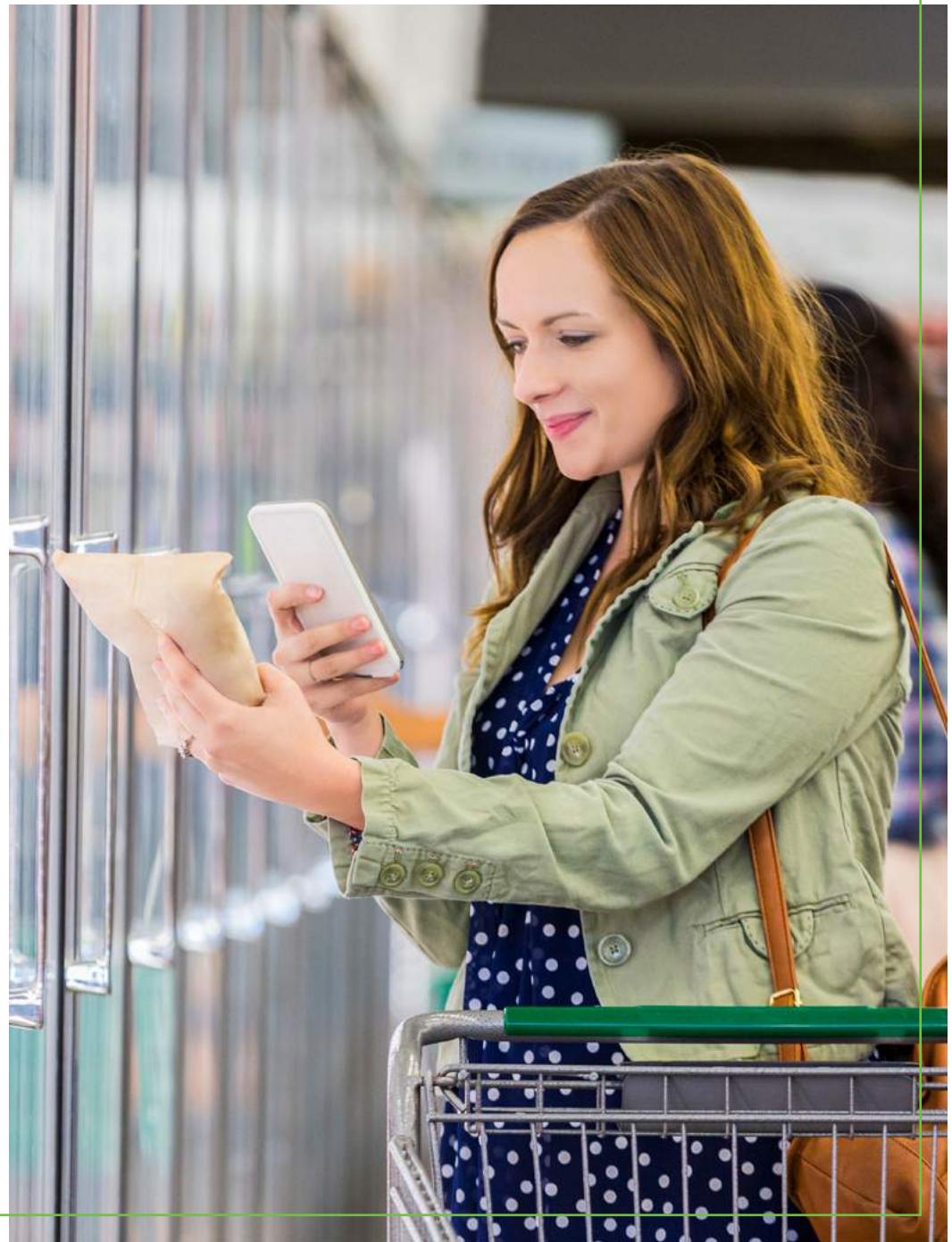
Their answers reveal how closely connected clean consumers view health and clean label. In fact 28% said that clean label means not only moving towards "nothing artificial" and "free-from" but also getting more beneficial ingredients into the mix like protein, fiber and vitamins.

- 24%** → Choosing whole foods that are healthy, and eating less processed foods when I can
- 17%** → Avoiding artificial ingredients in the products I consume
- 11%** → Choosing healthy products with added benefits such as fiber, protein, vitamins or minerals
- 8%** → Choosing healthy products that are free-from or reduced such as low sugar, low fat, reduced sodium
- 28%** → **Clean Label means all of the above**

Ingredient Perception & Clean Label Scores

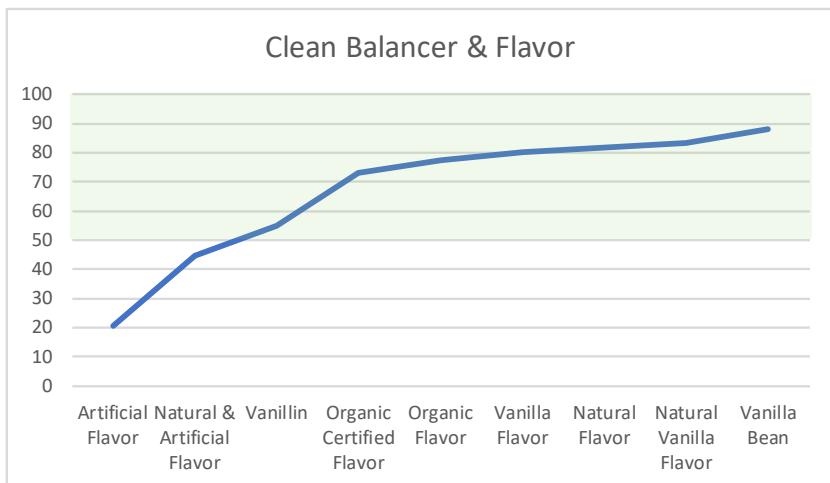
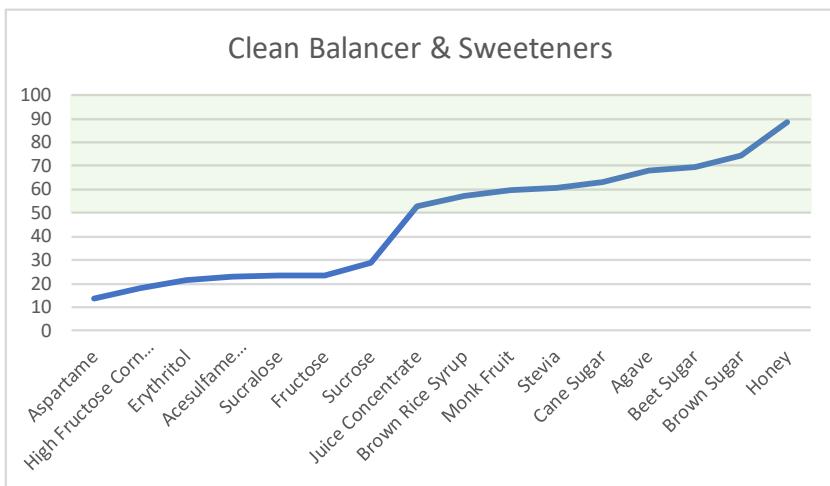
As the definitive consumer group when it comes to clean label, Clean Balancers' opinion matters. To inform your product development (and labeling) you need to understand consumer perspective on ingredients at a deeper level. With that in mind, FONA and a research partner are drilling down into exactly how consumers perceive specific ingredients. Each ingredient is assessed by a large pool of consumers, and their response (and response time) leads to a Clean Label Score™.

This analysis covers the spectrum of consumers and nearly any imaginable ingredient. But for now, let's zero in on the Clean Balancer and how they view select flavors and sweetener ingredients...



Flavors & Sweeteners: A Perception Snapshot

Using this analysis, let's take a look at how the Clean Balancer views common flavor ingredients and sweeteners. Note: the higher the score, the more "clean" the ingredient is perceived. Any score over 50 is perceived considered "clean label."



Some key takeaways:

- Interestingly: natural flavors are actually viewed as more clean than organic flavors – but both types of flavor easily meet the threshold for "clean".
- No surprise, the word "artificial" and scientific-sounding ingredients are viewed as less clean.
- On the sweetener side, aspartame appears to have the worst reputation for clean consumers, and even at the height of sugar focus, is rated lower than high fructose corn syrup.
- Ingredients like monk fruit, stevia and agave are not only well-known, but benefitting from clean perception

There's so much more.

Clean insights by category, channel, persona, occasion. We're happy to dig in deeper to the robust analysis to help you better inform your product development.

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Balance & Motivation

So, where will the clean label consumer take the food and beverage industry in the future? A peek at their motivation reveals that it's quite intimate – it's all about living an enjoyable life. In talking to the Clean Balancer group about their goals and habits, our survey revealed three key motivators...

1. Weight control 2. High-quality longevity 3. Family life



Why they try to eat healthy, in their own words:

"I want to lose weight and have more confidence in my body image."

"Try to live longer for my daughter."

"So that I can be around for my family for a long time."

"To be able to stay healthy to do the things that are necessary for daily living and for special things."

"To feel good and look good. Healthy living is happy living."



Weight loss, longevity and family life are interconnected in the lives of consumers. Having a "long life" isn't enough – that life has to be gratifying, independent and all alongside the family they love. What's interesting is that for many in this consumer group, the push toward healthier living is new. In fact, 57% say that their interest is new – that it's just recently they are paying more attention to their health to achieve a long and happy life.

Weight control is a top concern as well, with 44% of clean balancers citing weight (either maintaining or losing) as a primary motivation for their food and health decisions.

On Habits: Balancer Fast Facts

- 73% take vitamins
- 19% use essential oils
- 41% don't drink alcohol, and 38% drink "only socially."
- 76% exercise at least twice a week

THE TAKEAWAYS



Clean label is not a checkbox, but a continuum. This look at the Clean Balancer segment of consumers showcases just how personal the subject can be. It's intertwined with overall wellness, longevity and quality of life. Awareness of the term clean label has grown – as has the passion and defining parameters around the concept. A key piece of clarity to take forward: natural and organic flavors align perfectly within the Clean Balancers' expectations of clean label ingredients.

SOURCES

- FONA Proprietary Survey, *Clean Balancers*, 2018
- InsightsNow Database, 2018
- FONA, *Clean: Seven Consumer Trends That Will Define What's Next*, 2017
- FONA, *Clean: The Opportunity Report*, 2016

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/