



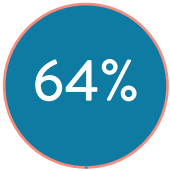
SHOPPER PANEL SPOTLIGHT

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

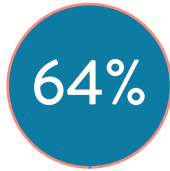


KEY FINDINGS

For our panelists, the term clean label is defined as: few, easy-to-pronounce, recognizable natural and real ingredients; not heavily processed and free from impurities and fillers and some panelists are still unsure of the term overall. They are willing to pay more for products with no artificial ingredients, recognizable ingredients, and organic but not non-GMO. They also identify with the "clean balancer" persona most.



agree they are willing to pay more for food & beverage items with "no artificial ingredients"



agree they are willing to pay more for food & beverage items with "recognizable ingredient lists"



agree they are willing to pay more for "organic" food & beverage items



agree they are willing to pay more for food & beverage items that are "non-GMO"

This week, our shopper panel takes on...

CLEAN LABEL

ATTITUDES & OPINIONS

In this interaction we wanted to know what our panelists think about clean label. Are they health savvy and strive to eat real food? Are they seeking food and beverages with and without certain ingredients? What are they willing to pay more for and how does flavor play a role in their perception of clean label.

CLEAN CONSUMER PERSONA



of our panelists identify as a "**clean balancer**."

You're all about balance. You choose to eat healthy on most days but still like to indulge time to time. You need convenience, but you try your best to make healthy choices.

"I know healthy, but life is about balance. Moderation also comes to mind. I feel I can indulge, especially if I've cut back on some of my intake." – Robin

"Because I want to be healthy but I also view food as enjoyment so it's a balance for me. If I'm out I'll order something more decadent but at home it's just as easy to have a salad or veggies than eating unhealthy." – Rhonda

CLEAN LABEL DEFINED

We asked our panelists to define clean label in their own words as it relates to food & beverages. Here are their responses.

- "Little or no chemicals, not heavily processed, few ingredients." – Howard
- "Honestly, I have no idea. I've never heard this term so I have never looked for that or been concerned over it. But I'm definitely going to look it up now!" – Zack
- "To me clean means it's free of any impurities or 'bad' ingredients i.e. sugar, etc." – Rhonda
- "Clean label should include ingredients you can pronounce and know what they are." – Jolene
- "Natural with little processing." – Robin
- "A minimal, clean, pleasing package design that conveys transparency re: nutrition and ingredients." – Theo
- "Items I can identify as whole food. Items without High Fructose Corn Syrup or Brown Rice Syrup or any other sucrose-form." – Sarah

There are many ways that flavor can be listed on an ingredient statement. We asked our panelists to select the preferred way that they would like to see flavor listed on the ingredient statement of an organic strawberry-flavored cookie. Organic natural flavor and organic natural strawberry flavor are the most acceptable versions.

- 79% stated “organic natural flavor” is acceptable
- 79% stated “organic natural strawberry flavor” is acceptable
- 71% stated “organic flavor” is acceptable
- Natural flavor was a 50/50 split
- 57% stated “natural strawberry flavor” is not acceptable

CHRISTINE B.

“Organic natural strawberry flavor would be the simplest, acceptable form. The others leave out something and are not acceptable.”

JUSTIN P.

“I am looking for something that resembles the natural form of the strawberry as proof that real. I am not looking for ‘Organic Strawberry flavor’ I am looking for ‘Strawberries’ in the ingredient list.”

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

Maybe you’re working on developing a new product or adding line extensions to an existing product line, but not sure what flavor profiles consumers are looking for. Maybe you’re looking to find a balance between classic flavor profiles and more up & coming alternatives and could use some advice. FONA’s subject matter experts can help you keep that signature taste AND the label claims your consumers demand. Clean label spans the spectrum. Where does your product fit in? Let’s talk. Contact us

WANT US TO ASK 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 POscarson@fona.com and let’s dive in!

CLEAN LABEL INGREDIENTS

We asked our panelists to define clean label in their own words as it relates to food & beverages. Here are their responses.

CLEAN LABEL	NOT CLEAN LABEL
79% organic flavors	100% natural & artificial flavors
71% natural sweeteners	93% artificial flavors
71% natural colors	93% artificial sweeteners
57% natural flavors	93% artificial colors

THE TAKEAWAYS

1

Clean Label Still Unclear.

Clean label is still considered an industry term. Many panelists are unable to clearly define clean label as it relates to food and beverage products. Consumer education and transparency are key to keeping shoppers informed and up-to-date on key happenings within the industry.

2

A Balancing Act.

The “clean balancer” is the consumer persona that our panelists identified most with. Finding ways to eat healthy all of the time is not feasible for most consumers. Finding small ways to treat themselves without feeling guilty as well as seek convenient ways to stay on track are definitely top of mind.