Consumer Perceptions of Free From Labeling
About MotivBase
Big data ethnography on-demand
About This Report

This report is a study of the dominant 'meanings' that make up your topic or research question. It is created by a cultural anthropologist, using our AI powered anthropology engine that uses contextual intelligence and big data to study and model the structures of meaning surrounding topics, trends, and issues in culture.

The big idea in 97 words.

Everything in culture - every topic, every idea, every trend, has both explicit and implicit meanings associated with it. Understanding these meanings (especially the implicit) allows us to not only decode the consumer’s mental model around these topics and ideas but also predict where those topics are headed and what impact they can have on your business.

This is what our AI Anthropologist does.

It decodes and quantifies the meanings around the topics that you care about, by examining and analyzing the natural and organic conversations that millions of consumers have on the internet (within each country).
Methodology
How data is gathered
How does it work?
Contextual Intelligence: The key to MotivBase's AI Ethnography

MotivBase understands that to truly decode culture (and conduct an immersive ethnography), it needs to go beyond direct mentions of a topic to explore the universe of topics or meanings surrounding a search term (discussed by consumers in the broader context of the search term).

To do this, we built an AI platform that uses Cultural Context Graphing technology. It’s a mouthful, we know. What is that you ask? It is the culmination of decades of social science theory married with the latest in NLP technology. And it allows our machine to perform a full, contextual analysis of millions of consumer conversations in the context of a topic to truly decode the system of meanings that are shaping it.

This is what allows MotivBase to perform an authentic, observational, big data ethnographic analysis of a culture in seconds. More importantly, it allows our technology to quantify trends, issues, ideas in culture based on the meanings consumers associate with it rather than the volume of conversation around it - giving us a real picture of where trends are headed.

This is a big data ethnographic analysis

This analysis is the result of MotivBase's algorithm studying product reviews and consumer chatter on the Internet.

100k+ Topics
MotivBase has examined thousands of meanings consumers create around your topic to deliver deep ethnographic insights.

20k+ Unique Individuals
MotivBase has conducted an ethnography of thousands of individuals to quantify the value of your search terms.
Where our data comes from

Our AI Anthropologist decodes the broader context of meanings around a topic in seconds and enables our team of PhD researchers to identify and quantify microcultures (areas of demand) for your business. To achieve this, we rely on sources that:

- Enable and encourage long-form interactions among consumers
- Give consumers the feeling of anonymity through the use of pseudonyms/usernames

These conditions give us a quality of data that allows us to get to the true consumer-led perspective around any topic or idea that is relevant to consumers in culture.

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**Facebook, Instagram, Twitter**

Platforms like Facebook or Instagram are not only a tiny piece of the overall picture, they also enable short/low quality interactions and give a distorted view of culture. Which is why it doesn’t meet our quality criteria for big data ethnographic analysis.

**Forums, Blogs, YouTube, News Sites, Product Review Sites etc.**

In order to enable real ethnographic analysis, our AI Anthropologist scrapes consumer interactions on platforms that enable pseudonymity and long-form conversation. Platforms like forums, blogs, comments under YouTube videos, news sites etc. make up our data sources. They also account for 95% of the activity on the internet.
Project Brief

Free From Labelling
Project Brief

• What are consumers' perceptions of free-from labeling?
Building Empathy
In what follows, we explore the major socio-demographics as well as the motivations, fears, and attitudes that shape consumers’ behavior.

Why do they care about free from labelling?

They want to prove that their decisions are based on evidence. Life decisions for these people are made after gathering extensive amounts of data and executing a great deal of research. They believe that there is a “right” way to do things, which needs to be substantiated with empirical proof.

What values are important to them?

They value healthy living. The support, improvement, maintenance, and enhancement of health for the self, and for others, including caring for physical and personal well-being.

What do they do about it?

They feel that product information tends to be confusing. They believe that most information regarding consumer products is confusing these days due to the use of “code words,” scientific terminology, and generic terms (like natural colors). This makes it hard for them to understand and decode labels. Different brands and media outlets also send out conflicting messages about product benefits, which makes decision-making highly frustrating.

What do they fear the most?

They fear harming their health and the environment. They care about the environment and about the welfare of the living beings in it. They fear that their consumption habits are ultimately harming the planet and their health, and even the health of their kids, given the rising pollution levels, mass food production and GMOs.
This culture is being driven by people who are 25-44, middle and upper middle class and educated.

487,880 Unique Individuals studied; 380,282 Topics or meanings studied; 30 hours spent by PhD cultural anthropologist studying the topic.

*Note: the people that drive a culture aren't always the people most affected by it. Although the middle-to-upper class is driving this culture, changes within it impact the lower and upper class as well.

**Maturity Curve For: free label, list of ingredients**

This topic scores 17.1% on the maturity curve.

This culture is currently relevant to **30.2M** people.
Here are the five microcultures relevant to free from labelling

1. **Certifications**
   Consumers want to know that free-from labelled products are certified and vetted by third party agencies.

2. **Scrutinizing Ingredients**
   Consumers are pouring over product labels to make sure their purchases are actually free from unwanted ingredients.

3. **Soy & Phytoestrogens**
   People are increasingly worried that the phytoestrogens in soy may harm their health.

4. **Soy & Ethical Farming**
   Consumers increasingly associate soy with farming practices that they deem unethical like genetic modification, deforestation, and use of toxic pesticides.

5. **Soy & Plant-Based Foods**
   Vegan and vegetarian consumers are searching for delicious meat and dairy alternatives that are also soy-free.
Certifications
Consumers want to know that free-from labelled products are certified and vetted by third party agencies.

- Consumers are beginning to question whether free-from labels always guarantee a product's quality or contents, and so they're scanning food packaging for logos and symbols that indicate third-party vetting and certification.

- They're learning that **some free-from labels are misleading**. For example, they're reading that brands occasionally falsely claim that a product is gluten-free (using terms like gluten-friendly, meaning it wasn't prepared in a certified gluten-free facility).

- They want to see **evidence of third-party testing** on product packaging like Vegan.org’s Certified Vegan symbol or the official stamp of the Gluten-Free Certification Organization (GFCO).

- They're **more suspicious of free-from labeling on generic brands**, as they believe these brands have less control over their supply chains.

### Topics that indicate these findings

- certified gluten
- labeled gluten
- labeling laws
- organic ingredients
- certified gf
- vegan brand
- gluten content
- is dairy
- gluten free
- generic brand
- kirkland brand
- brand products
- certified vegan
- contain gluten
- ingredient label
- avoid products
- 3rd party lab
- contain ingredients
- food products
- ingredient list

### Maturity Curve

**Maturity Curve For: free label, list of ingredients, certified gf**

- This topic scores **15.2%** on the maturity curve.
- This culture is currently relevant to **27.6M people**.
Scrutinizing Ingredients
Consumers are poring over product labels to make sure their purchases are actually free from unwanted ingredients.

- Some consumers reveal that they distrust free from labeling because many ingredients are hidden behind scientific names.

Given this distrust, they're scrutinizing ingredients list and researching the origins of different additives. For example, they're reading that chemical additives like sulfites, sodium lauryl sulfate, dyes, and thickening and caking agents are often omitted from ingredient lists or disguised using catch-all terms like "artificial flavoring," making them hard to verify and avoid.

Thus, they prefer products with short and transparent ingredient lists so they can double-check free-from claims.

They also discuss how certain ingredients (such as lecithin) may be made from a common allergen (such as soy) but not necessarily labeled as such. Even if a product has a free from label, they scrutinize the possible origins of these ingredients. Consumers are also worried that free from labels may not extend to the contents of the packaging. For example, they discuss the fact that vegan products may be in beeswax wrappers, which strict vegans may want to avoid. They worry that a free from label may not consider the packaging materials.

Topics that indicate these findings

- ingredients list
- added ingredients
- thickener
- flavorings
- artificial flavors
- natural flavors
- additives
- fruit flavors
- sulphite
- beeswax wraps
- artificial ingredients
- natural extracts
- other additives
- artificial flavoring
- safe ingredients
- similar ingredients
- check ingredients
- bad ingredients
- minimal ingredients
- harmful ingredients
- extra ingredients
- ingredient label
- artificial preservatives
- synthetic additives
- thickening agent
- fortified foods
- food dye
- laureth sulfate
- different formulations
- other sweeteners
- caking agents
- soy lecithin
- bleaching agent
- sulfites

Maturity Curve For: free label, list of ingredients, ingredients list

This topic scores 14.5% on the maturity curve.

This culture is currently relevant to 24.6M people.
Soy & Phytoestrogens
People are increasingly worried that the phytoestrogens in soy may harm their health.

- Consumers increasingly think they should avoid soy products because they believe they're full of estrogen-mimicking chemicals. They see free from soy and free from dairy labels as a promise that a product won't disrupt their natural hormones.
- They're worried that the high concentrations of phytoestrogens in soy products like tofu, soy milk, and edamame may cause them to develop hormone imbalances, causing issues like acne. They're also reading that phytoestrogens may cause early-onset puberty.
- Although they're learning that heat-treated soybean oil or fermented soy products like tempeh have lower concentrations of phytoestrogens, they're still inclined to look for soy-free labels on their food products to play it safe.
Soy & Ethical Farming
Consumers increasingly associate soy with farming practices that they deem unethical like genetic modification, deforestation, and use of toxic pesticides.

- Consumers are beginning to look for free-from soy labels because they want to avoid environmental destruction, and they believe some commercial soy is farmed irresponsibly.
- They believe that soy crops are often GMO and drenched in toxic pesticides. They're also reading that soy farms are contributing to massive deforestation in places like Brazil.
- Furthermore, consumers also want to know that the meat that they're purchasing hasn't been given soy feed. They're looking for grass-fed labels on meat and dairy products, which they see as a form of free-from soy labeling for animal products.
- If consumers do buy soy products, they want them to be vetted by an organization such as Rainforest Alliance to ensure sustainable and ethical farming.

### Topics that indicate these findings

- rainforest alliance, hydrogenated vegetable oils, nestle, bad chemicals, kind of oil, expeller, unethical companies, avoid brand, check labels, food manufacturers, milk industry, bad brand, grass fed, canola oil, licensed brand, gmo, beef flavoring, meat burger, different milk, dairy milk, think milk, dairy cheese

### Maturity Curve For: free label, soy, rainforest alliance

**Maturity Curve**

**16.6%**

**current**

This topic scores 16.6% on the maturity curve.
This culture is currently relevant to 27.8M people.
This topic is exhibiting high volatility and therefore cannot be predicted.
Soy & Plant-Based Foods
Vegan and vegetarian consumers are searching for delicious meat and dairy alternatives that are also soy-free.

- Consumers are increasingly interested in finding vegan meat and dairy alternatives that are soy-free. They’re reading that soy is often **highly processed** and some believe it’s may have negative health impacts when **eaten in high quantities**. Even though they discuss eating soy protein sources like tofu, they are worried about the overall amount of soy in their diet.

- They look for free from labels on **vegetarian protein substitutes** to more easily diversify their protein sources. In particular, they discuss replacing **soy milk, burgers, and cheeses** with soy-free nut milks, vegan “cheeses” made from cashews or coconut oil, and veggie burgers made using pea protein, mycoproteins, and/or beans (e.g., Impossible Foods).

- As they see it, diversifying the protein **minimizes the possible negative health impacts of soy and improves their overall health**.

- However, they worry that many non-soy vegetarian protein sources aren’t **vegan friendly**, and they express frustrations when they have to juggle soy-free and vegan-friendly labels.

**Topics that indicate these findings**

- vegan thing, mock meats, oatly, dairy alternatives, beyond burger, fake meat, contain animal products, vegan alternatives, quorn, almond milk, pea milk, beyond meat burgers, oat milk, contain eggs, based milk, vegan products, contain gelatin, impossible burger, impossible meat, vegan cheese, pea protein, impossible whopper, dietary reasons, have tofu, meat options, soybeans, quorn products, seitan, violife, primary ingredient, gmo, texture of meat, based protein, vegan label, vegan meat substitutes, rice protein, soy protein

**Maturity Curve For: free label, soy, vegan products**

This topic scores **13.5%** on the maturity curve. This culture is currently relevant to **23.1M people**. This topic has only recently begun to stabilize. Hence could be considered to exhibit some amount of volatility.
Synthesis
Zone of Innovation
Future State: *Where the demand spaces net out*

Through more than 200 benchmarking experiments, MotivBase has learned that the key time to launch a solution into market is when a demand space falls between 33% - 55% on the maturity curve. That is, it ideally falls in the second half of the Early Majority Stage.

When we look at demand spaces and their predictions through MotivBase, we recommend focusing on those opportunities that will fall into the zone of innovation in the future (through the prediction capability). This ensures that we prioritize those opportunities that will not only fall within the zone of innovation but also provide us the runway needed (time) to bring something powerful into market in a timely manner.
SUMMARY
Consumers want to know that free-from labeled products are certified and vetted by third-party agencies.
Future State: *Where the demand spaces net out*

**SUMMARY**

Consumers are poring over product labels to make sure their purchases are actually free from unwanted ingredients.
Future State: *Where the demand spaces net out*

**SUMMARY**

People are increasingly worried that the phytoestrogens in soy may harm their health.
SUMMARY
Consumers increasingly associate soy with farming practices that they deem unethical like genetic modification, deforestation, and the use of toxic pesticides.
Future State: *Where the demand spaces net out*

**SUMMARY**

Vegan and vegetarian consumers are searching for delicious meat and dairy alternatives that are also soy-free.
Executive Summary
Who cares about **consumer perceptions of free from labeling**?

They want to prove that their decisions are based on evidence. Life decisions for these people are made after gathering extensive amounts of data and executing a great deal of research. They believe that there is a “right” way to do things, which needs to be substantiated with empirical proof.

### What are consumers discussing?

- **Certifications**
  Consumers want to know that free-from labeled products are certified and vetted by third-party agencies.

- **Scrutinizing Ingredients**
  Consumers are pouring over product labels to make sure their purchases are actually free from unwanted ingredients.

- **Soy & Phytoestrogens**
  People are increasingly worried that the phytoestrogens in soy may harm their health.

- **Soy & Ethical Farming**
  Consumers increasingly associate soy with farming practices that they deem unethical like genetic modification, deforestation, and the use of toxic pesticides.

- **Soy & Plant-Based Foods**
  Vegan and vegetarian consumers are searching for delicious meat and dairy alternatives that are also soy-free.

### Calls to action:

- Develop a resource for consumers to learn about which free-from labels require third-party vetting.
- Keep consumers in the loop about changes in free-from labelling requirements.
- Create a resource for consumers to learn more about controversial arming practices like genetic modification.