

# Gaining Clarity Through On-Demand Behavioral Research

**Sarah Kirkmeyer**

Sr. Director,  
Client Partnerships

**Karen Lynch**

Sr. Director, Innovation  
Research & Insights



*Changing the way you  
look at humans  
uncovers new insights  
into why products  
succeed—improving  
your speed-to and  
success-in market.*

# ***What industries are being disrupted today by on-demand?***





# Change in Era in Market Disruption

## Clean Label



### Growth of Plant-based Alternatives by Category

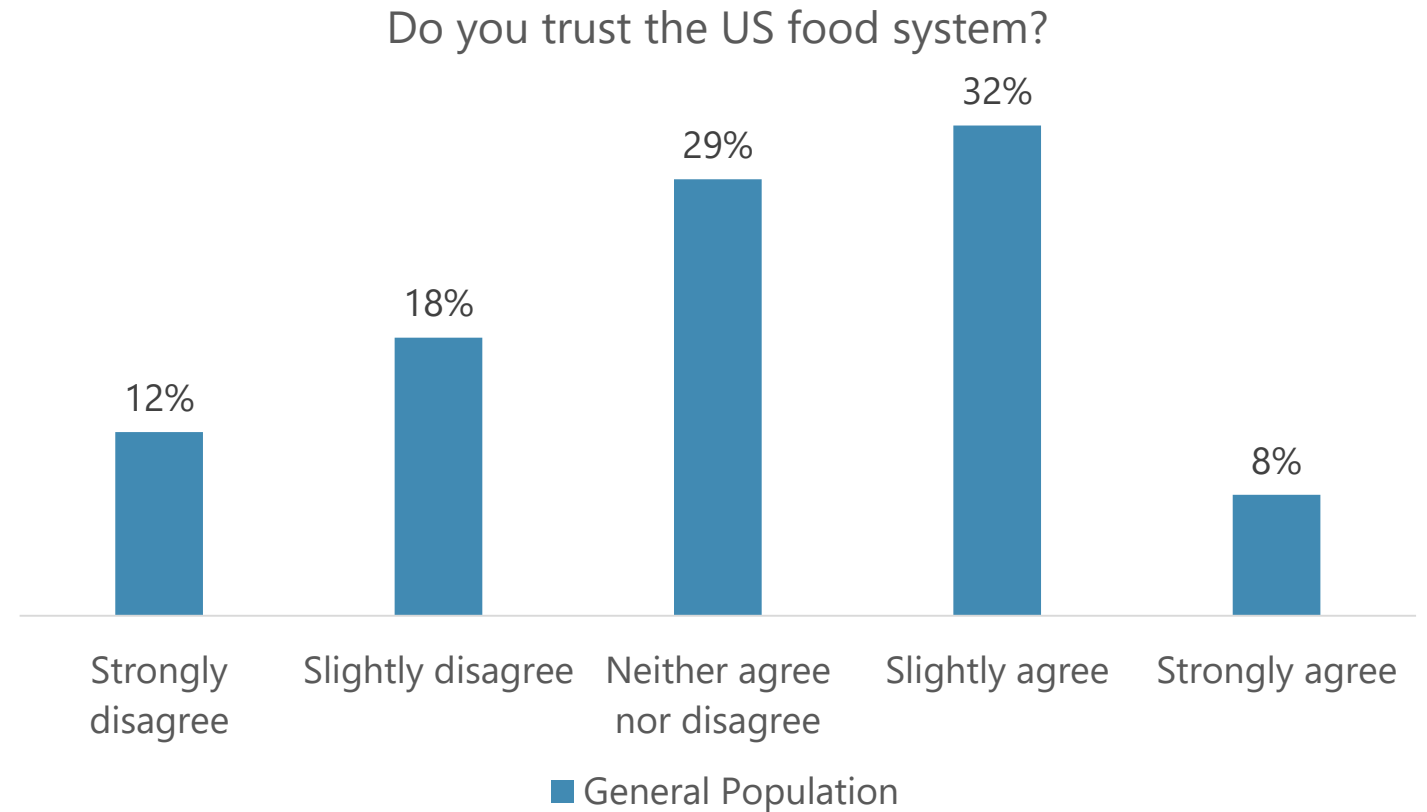
Category	Dollars	Growth
Milk	\$1.9B	6%
Meat	\$801M	10%
Meals	\$387M	6%
Ice Cream	\$304M	26%
Yogurt	\$230M	39%
Creamer	\$226M	40%
Butter	\$189M	5%
Cheese	\$160M	19%
Tofu and Tempeh	\$118M	5%
Ready-to-Drink Beverages	\$103M	23%
Condiments, Dressings, and Mayo	\$70M	7%
Spreads, Dips, Sour Cream, and Sauces	\$21M	52%
Eggs	\$6M	38%
<b>TOTAL PLANT-BASED FOODS</b>	<b>\$4.5B</b>	<b>11%</b>

52 weeks ending April 2019.  
Commissioned data from SPINS.



[plantbasedfoods.org](http://plantbasedfoods.org)

# An Erosion of Consumer Trust



April 2019 "Consumer Trust Study" by InsightsNow



# **Innovating to Disrupt Requires Clarity through Insights for Rapid Decision Making**



# ***On-Demand*** **Strategic** **Tools for** **Decision Makers**



A woman with dark hair and wide eyes is looking up at a chalkboard. On the chalkboard, there are several hand-drawn lightbulbs of different shapes and sizes, connected by dashed lines that form a network. The text "Faster Insights" is written in white across the middle of the board.

Faster Insights



# Speed to Insights



## Tools for Quick Access – Anywhere, Anytime

- Changes in Food Product Choices
  - Impact of Ingredients, Benefits and Claims
  - Impact on Brand Trust and Awareness
  - Impact of Trial





# *Save money*

## Cost Effective Insights



# Cost Effective Insights



## Tools: Information → Insights

- Community Based (e.g. Clean Label Enthusiasts, Category Advocates)
- Automatic Processing of Data into Insights (e.g. Machine Over Human)
- Cost Sharing through Apps and Dashboards







# Behavioral Insights

# Investing in Databases of *Behavioral KPIs*



## Tools Based on Behavioral KPIs

- Key off of Different Consumer Perspectives (Category Shoppers, Lead Adopters, Influencers)
- Measures of Performance (Ingredients, Claims, Brand, Positioning)
- Proven Metrics that Indicate Behavioral Impact (Nudge or Disrupt)





# Behavioral KPI – Ingredient Clean Label Score™



What is the impact of seeing an ingredient on a product label?



Results Back to Home Download

Type	Compare Implicit/Explicit Test Scores of Ingredients within Food Category
Name	Sweeteners
Executed	Jan 23, 2020
Filters	<b>Ingredients</b> Agave, Aspartame, High Fructose Corn Syrup, Honey, Stevia, Sucrose, Sugar <b>Food Categories</b> Beverages (Dairy), Beverages (Nutritional)
Credits used	1 credits

Hide lettering Show sample size

Search rows	Beverages (Dairy)	Beverages (Nutritional)	Total
Honey	79.83 A	87.32 A	85.66 A
Agave	59.17 B	69.75 B	66.62 B
Stevia	56.25 BC	60.50 C	59.56 C
Sugar	47.13 C	50.00 D	48.92 D
Sucrose	22.13 D	26.87 E	25.68 E
High Fructose Corn Syrup	10.67 D	16.18 F	14.10 F
Aspartame	11.46 D	15.50 F	13.98 F
Mean	47.73	58.88	55.83
Sample size	126 - 212	143 - 342	396
P-Value	<0.0001	<0.0001	<0.0001

← High Acceptance

← High Avoidance

# Strategies for Behavioral KPIs



## Food Product Design

**Claims &  
Positioning**

**Label  
Design**

**Ingredients**

**Brands**

## Sensory Experience

**Emotional  
Impact &  
Liking**

**Context of  
Use**

**Perceived  
Relevance**

**Perceived  
Benefits**



# THE INSIGHTSNOW BEHAVIORAL APP STORE™

Product Development & Marketing Tools  
to Nudge and Disrupt Consumers



By accessing unique Behavioral Key Performance Indicators (KPIs), Behavioral Reports and custom research opportunities, you can accelerate learning through this cost effective online service.

Integrating knowledge you need to improve your focus on consumers seeking cleaner living, this app store is a highly efficient, collaborative and economical improvement to your innovation research process.

## BEHAVIOR KNOWLEDGE CENTER

Stay current on consumer behavior to learn how and where you can nudge and disrupt consumers.

## BEHAVIOR KPI CENTER

Is your label clean enough?

Quickly look up behavioral scores for ingredients, supplements, claims, benefits, and brands to make quick product development and positioning decisions.

## BEHAVIOR TESTING CENTER

Conduct proprietary research with category advisors quickly and efficiently to improve new product innovation processes and measure influence and consumer impact.



# Plant-Based Burgers | Case Study



# Plant-Based Burger Category Disruptor

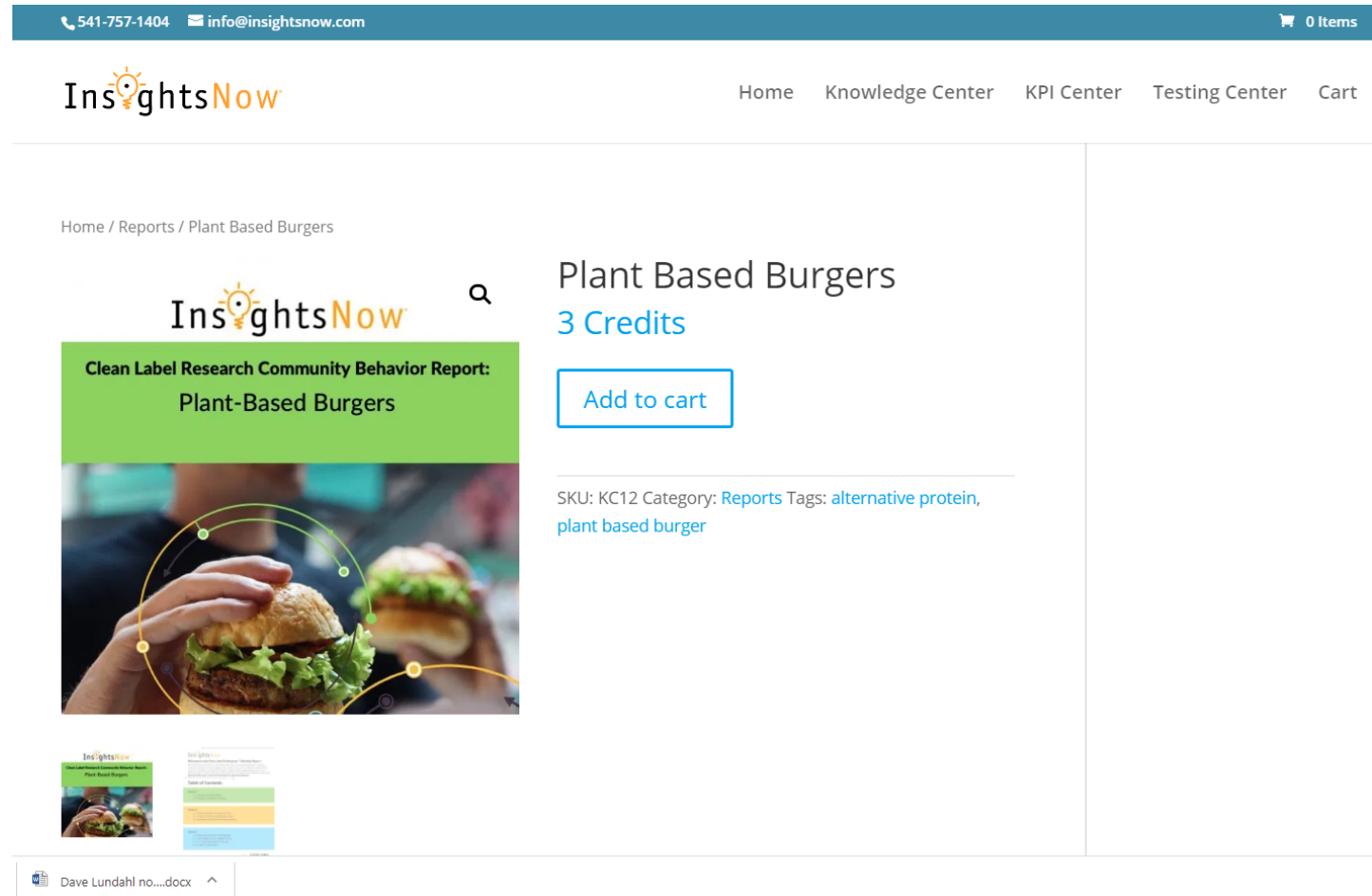


## New Formula for Disruption





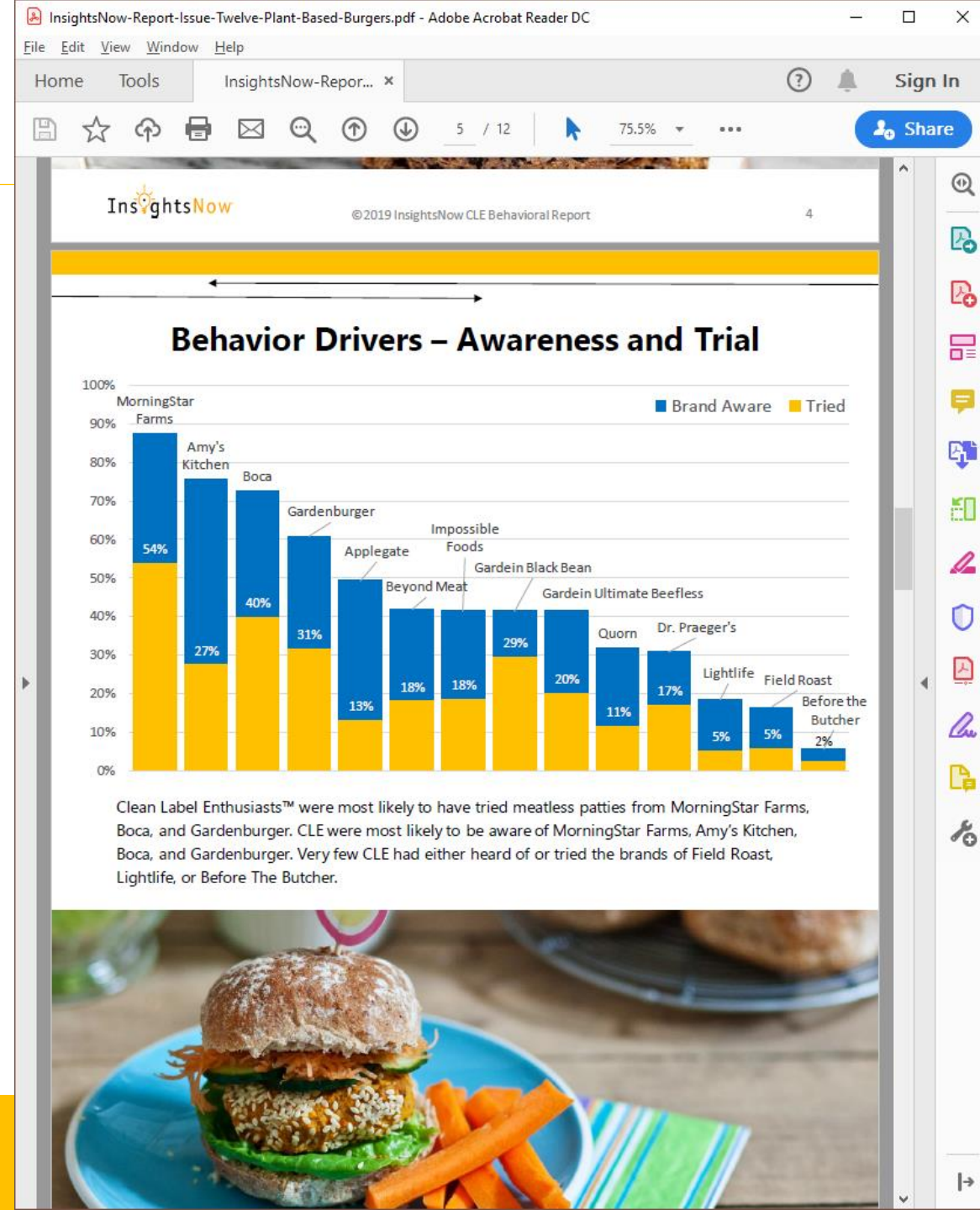
# Opportunities to Nudge or Disrupt



# Category Review

## *Initial Insight*

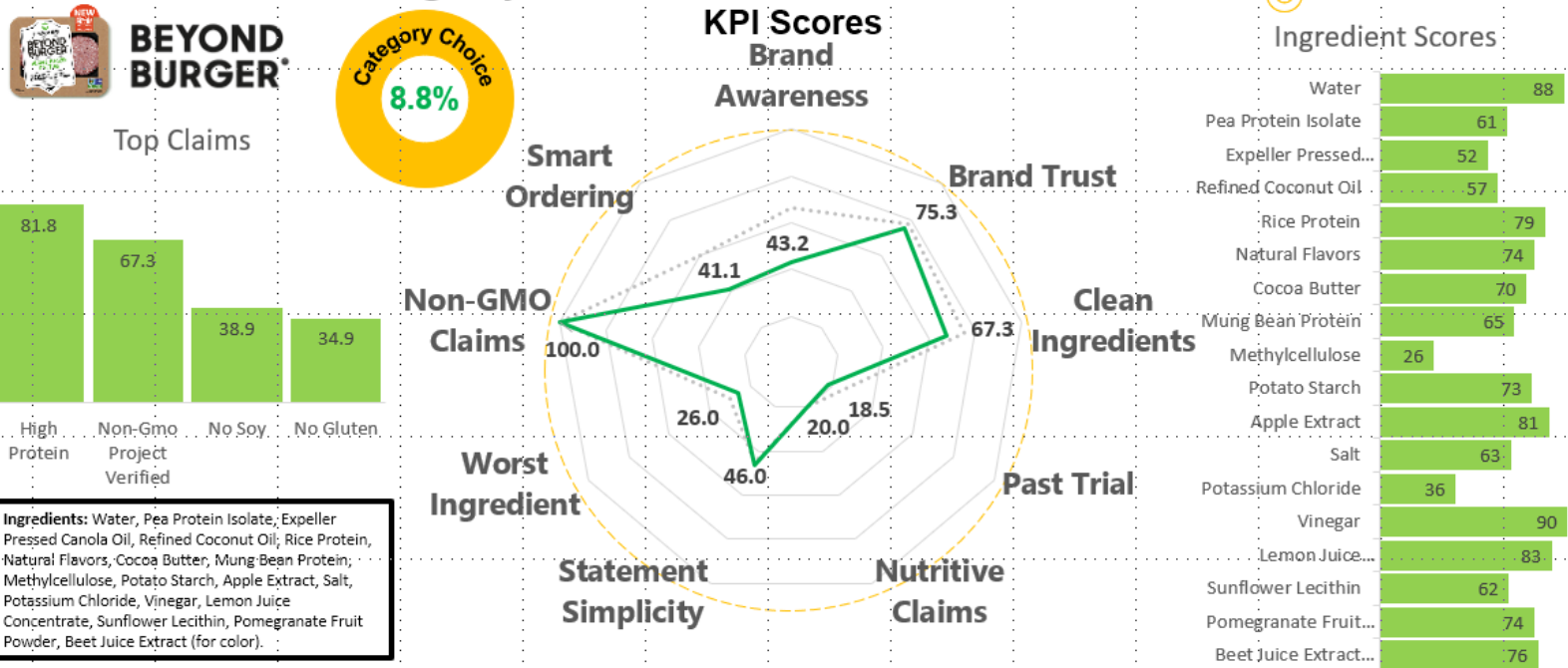
**Awareness is a key driver  
of plant-based burger  
choice**



# Opportunities to Nudge or Disrupt



## Beyond Burger Product Scorecard Plant-Based Category Baselines





# Behavioral KPIs

*Baselines and Focus Areas Available On-Demand*



## Plant-Based Burger Category

### Behavioral KPIs

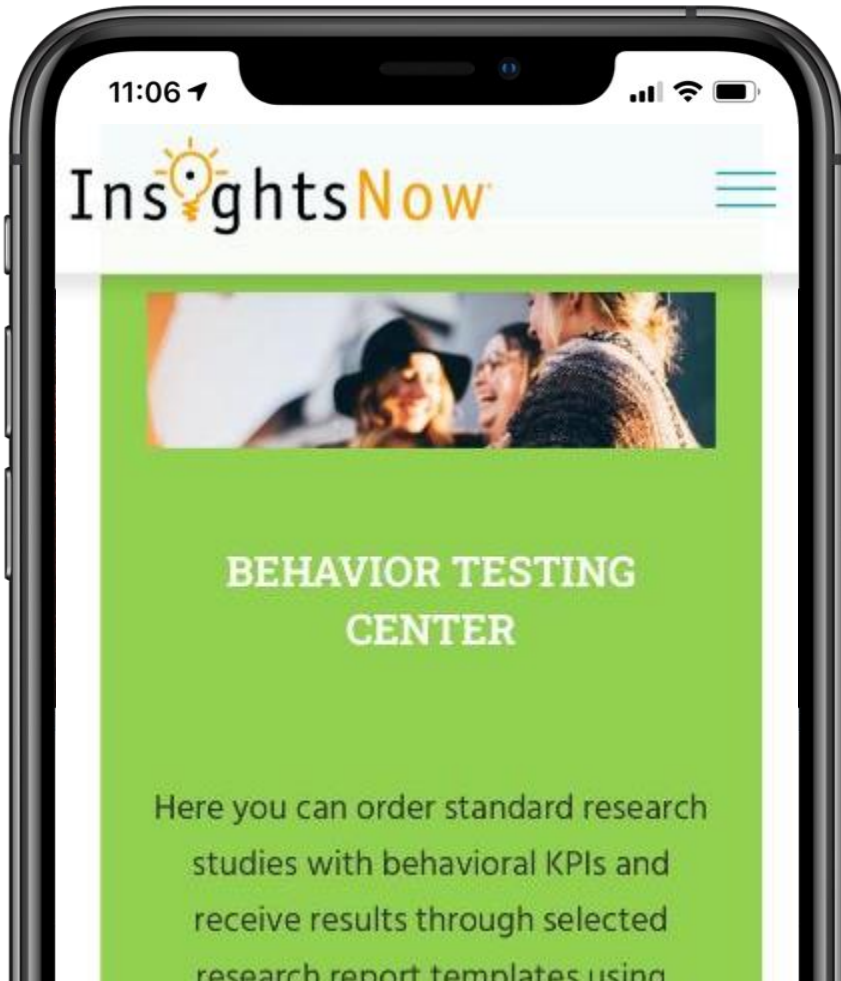
- 193 Ingredients - Clean Label Scores
- 14 Brands – Brand Awareness & Trust Scores
- 29 Claims – Claims Importance Scores
- Ingredient Statement Simplicity, Smart Order
- Awareness of Brands

### Behavioral Baselines

- Category User Choices (14 SKUs) – Max Diff Exercise



# Opportunities to Increase Category Choice



541-757-1404 info@insightsnow.com 0 Items

InsightsNow Home Knowledge Center KPI Center Testing Center Cart

BEHAVIOR TESTING CENTER

Conduct research with category advisors quickly and efficiently. From idea creation and screening to in-home product placements, the behavioral testing center caters to the core product research methods needed to improve the development and design of your new product innovation and measure how your new product will change what consumers will buy and where you will take share.

HOME USE TESTING  
InsightsNow Communities

ONLINE FOCUS GROUPS  
InsightsNow Communities

ONLINE BULLETIN BOARDS  
InsightsNow Communities

VIDEO DEEP DIVES  
InsightsNow Communities

Order standard research studies with behavioral KPIs and receive results through selected research report templates using account credits. Research is executed through InsightsNow Communities of advocates pre-screened to be specific category buyers and/or representatives of shoppers with specific buying behaviors (e.g. Clean Label Enthusiasts).

Home Use Testing

Online Focus Groups Online Bulletin Board Video Deep Dives

Re-focus your product research with in-home, in-the-moment product trial and review.

Order InsightsNow Community Home Use Tests (cHUTs) with product delivered for assessment by community members pre-screened to fit your target consumer.

Apply credits to access consumer insights through the Behavioral Key Performance Indicators (KPIs) Application Center.



# cHUT Design

## Pre-cHUT Baseline

- Category Choice
- Category Use

## cHUT Current Product

- Liking, JAR
- Emotions Reactions
- Product Impressions
- Category Choice
- Anticipated Use

## cHUT Beyond Burger

- Liking, JAR
- Emotions Reactions
- Product Impressions
- Category Choice
- Anticipated Use








# New Choice-Based Baseline

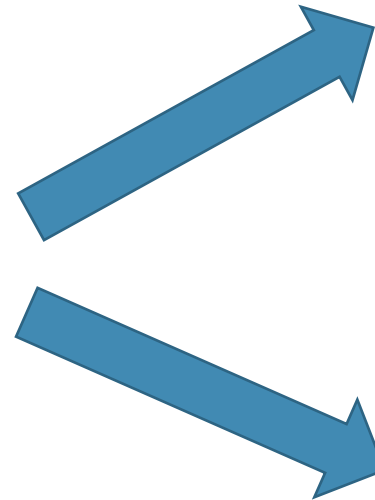
## *Ranked Choice from Max Diff*



From these 3 plant-based burger patty products, please select the product that is the **MOST APPEALING** to you and the product that is the **LEAST APPEALING** to you.

Please select one response in each column.

	Most Appealing	Least Appealing
 <p><b>Boca All American Classic Burger</b> Non-GMO Soy, High Protein <b>Ingredients:</b> Water, Soy Protein Concentrate, Reduced Fat Cheddar Cheese (Pasteurized Part-Skim Milk, Cheese Culture, Salt, Enzymes, Annatto (Color), Vitamin A (Palmitate)), Wheat Gluten, Corn Oil, Yeast Extract, Caramel Color, Modified Cellulose, Salt, Natural Flavor (Non-Meat), Dried Onion, Garlic Powder, Sesame Oil.</p>	<input type="radio"/>	<input type="radio"/>
 <p><b>Gardenburger The Original Veggie Burger</b> Natural Ingredients, Lots of Whole Grain, Good Source of Fiber <b>Ingredients:</b> Cooked Brown Rice (Long Grain Brown Rice, Water), Button Mushrooms, Rolled Oats, Mozzarella Cheese (Pasteurized Part-Skim Milk, Cultures, Salt, Enzymes), Onions, Water, Hydrated Wheat Bulgur (Water, Bulgur Wheat), Cremini Mushrooms, Spices, Portabella Mushrooms, Cheddar Cheese (Pasteurized Milk, Salt, Enzymes, Cultures, Annatto Color), Contains 2% or less of Salt, Natural Flavors, Modified Vegetable Gum, Garlic Powder, Yeast Extract, Citric Acid, Whey, Malted Barley, Annatto Color, Malted Barley Flour, Onion Powder, Mushroom Powder, Guar Gum, Annatto Extract (Color), Turmeric Extract (Color), Soy Lecithin.</p>	<input type="radio"/>	<input type="radio"/>
 <p><b>Beyond Burger</b> No Soy, No Gluten, Non-GMO Project Verified, High Protein <b>Ingredients:</b> Water, Pea Protein Isolate, Expeller-Pressed</p>	<input type="radio"/>	<input type="radio"/>



Probability “Most  
Appealing”

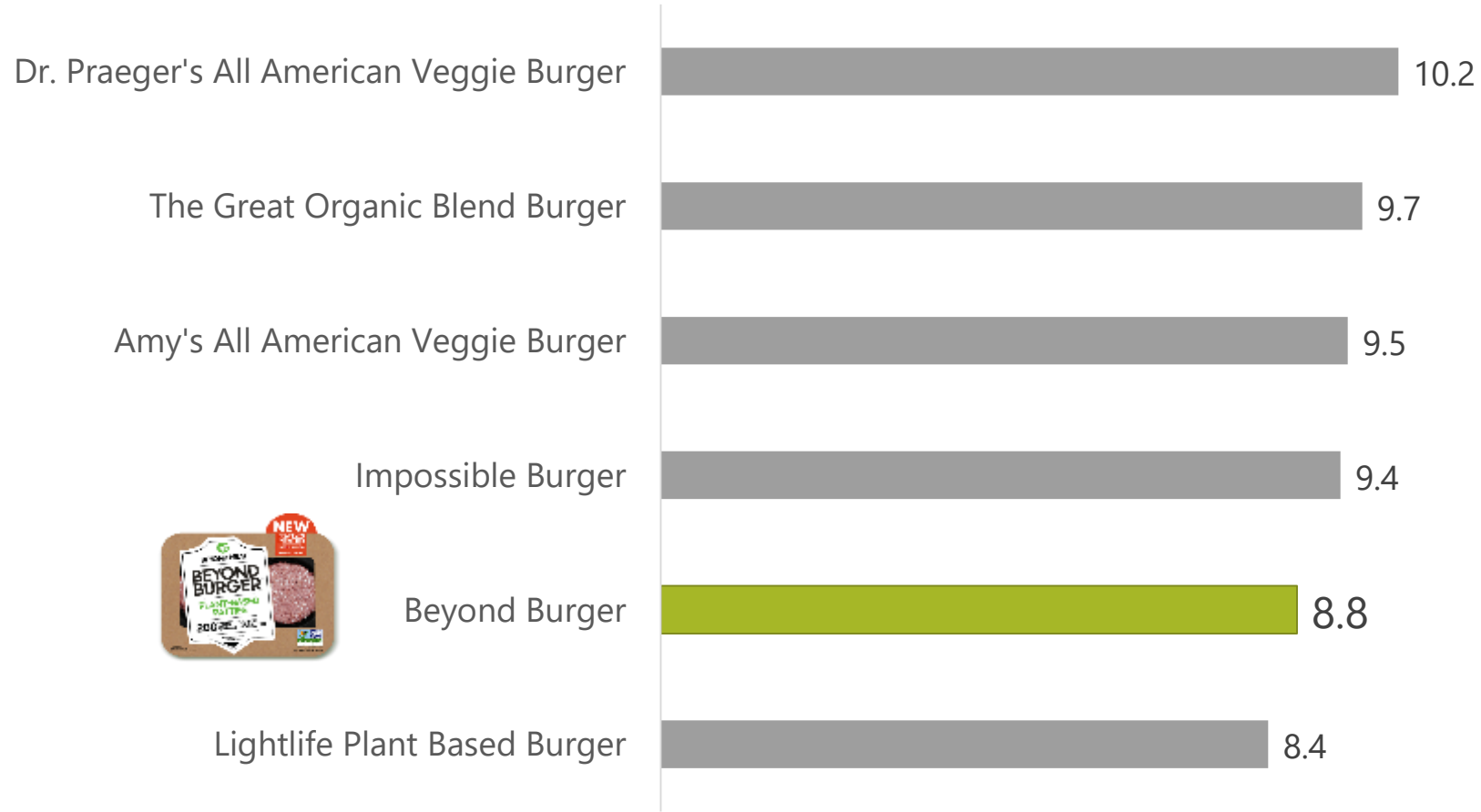
Probability “Least  
Appealing”

# Category Choice

## *Ranked Choice – MaxDiff Index*



### Pre-Trial “Baseline”

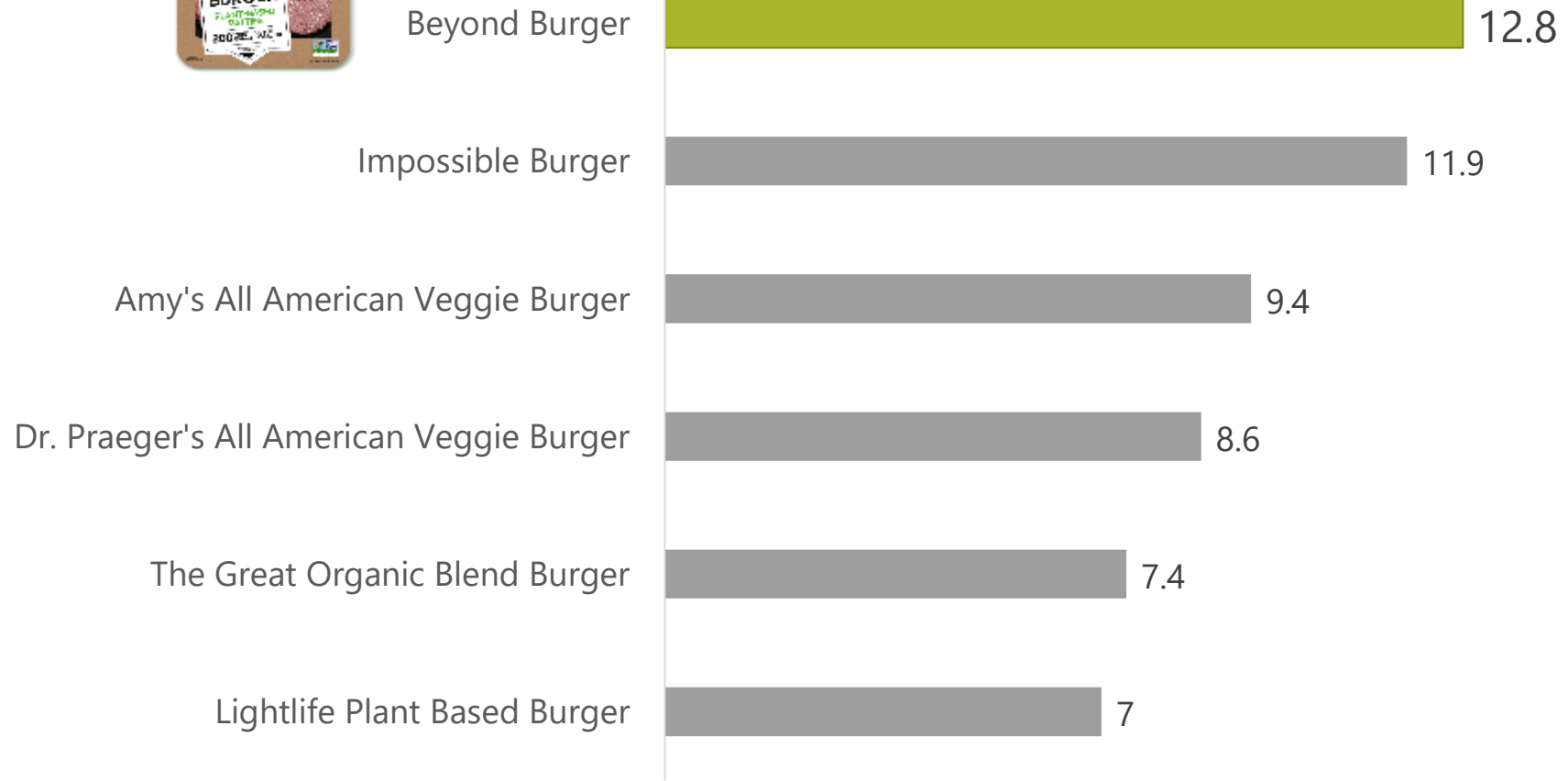


# Category Choice

## Ranked Choice – MaxDiff Index



### POST-Trial





# Lift Potential

*By Increasing Awareness and Trial*

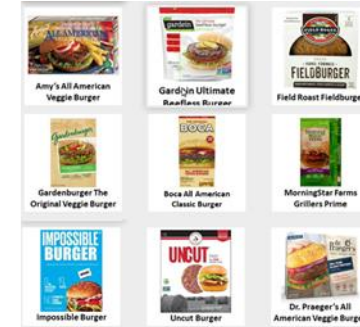


$$\text{Lift \%} = \frac{\text{Choice After Trial}}{\text{Choice Before Trial (Baseline)}}$$

=

8%

**Average All Products**



**BEYOND  
BURGER®**

46%

# Lift is a Metric of Potential to Disrupt



**BEYOND  
BURGER®**

46%

Vs

8%

**Average All Products**

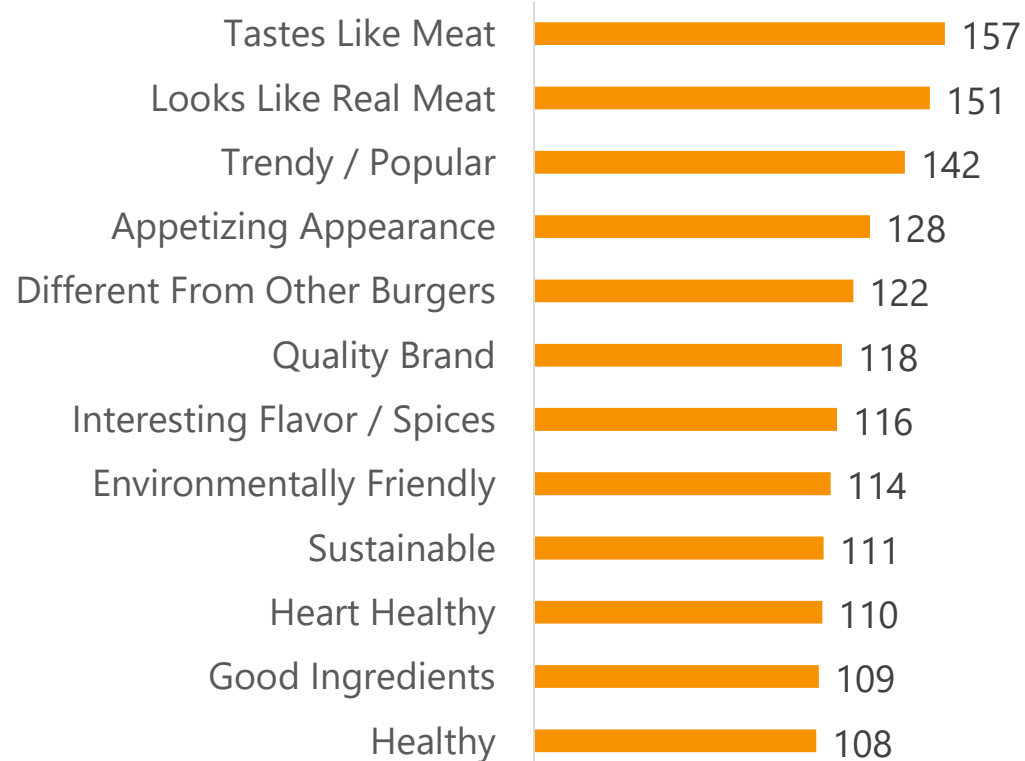


# Why Beyond Burger is a Disruptor

## *New Rewards*



### Index Compared to Current



Note: Index of 120 and above is significantly greater than average



**BEYOND MEAT** GO BEYOND PRODUCTS

## BEYOND BURGER®

THE WORLD'S FIRST PLANT-BASED BURGER THAT LOOKS, COOKS, AND SATISFIES LIKE BEEF WITHOUT GMOS, SOY, OR GLUTEN. FIND IT IN THE MEAT AISLE.

- 20G PLANT PROTEIN
- NO GMOS
- NO SOY OR GLUTEN
- KOSHER

FIND BEYOND BURGER® [GO](#)

# Opportunities to Improve the Reward

## *Nudge through the Sensory Experience*



	Current Product	Beyond Burger
9pt Scale Mean Scores		
Overall Liking	6.7	7.0
Uncooked Appearance Liking	5.5	6.2
Cooked Appearance Liking	<b>6.5*</b>	<b>7.4*</b>
Aroma While Cooking Liking	6.3	6.5
Flavor Liking	6.7	7.0
Texture Liking	<b>6.4*</b>	<b>7.1*</b>

*\*Statistical Difference between Current and Beyond Burger*

**Ensure quality of  
Appearance and Texture  
are maintained to keep  
ahead of competition**





# Opportunities to Improve Experience

## *Product Improvement*



	Beyond Burger		
	% Too Much	% JAR	% Not Enough
<b>Uncooked Exterior Color</b>	4	65	31
<b>Cooked Exterior Color</b>	5	78	17
<b>Cooked Interior Color</b>	1	81	17
<b>Flavor</b>	9	77	15
<b>Grill Flavor</b>	4	75	21
<b>Smoke Flavor</b>	4	62	35
<b>Spice Blend Flavor</b>	4	63	33
<b>Beef Flavor</b>	5	67	28
<b>Juiciness</b>	5	72	23
<b>Firmness</b>	4	84	12

Please describe the strength of the Beef Flavor...

Much too weak	Somewhat too weak	Just about right	Somewhat Too Strong	Much Too Strong
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

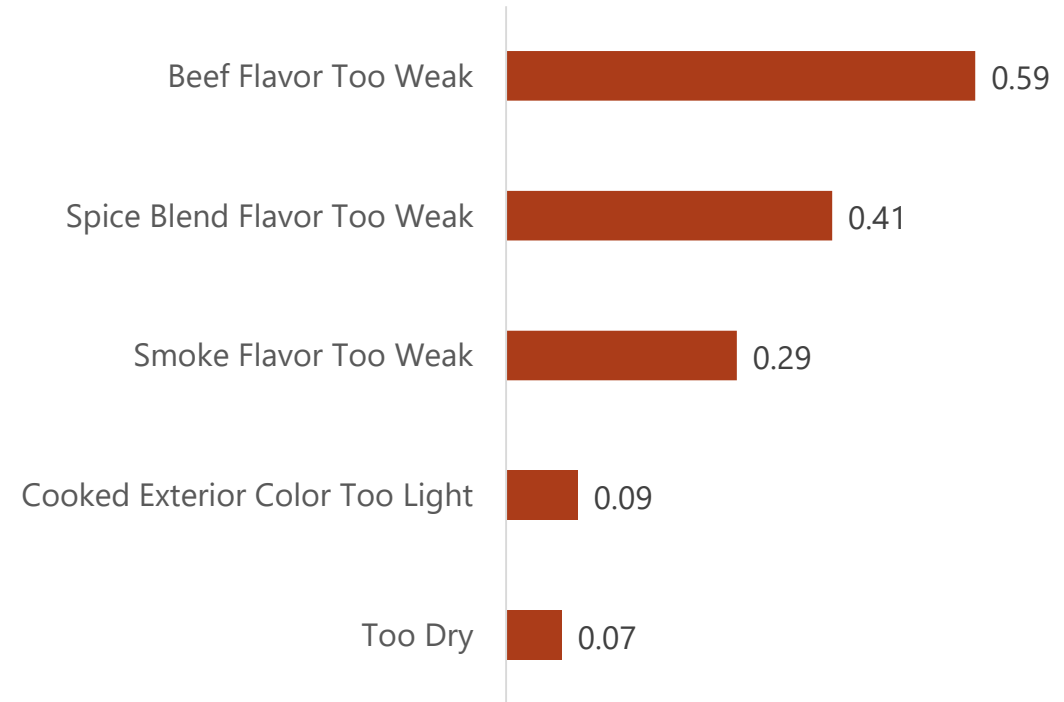
# Opportunities to Improve Experience

## *Actionable Insight*



### **Continue to Innovate Beef Flavor to Increase Liking**

#### Beyond Burger Weighted Penalties Against Overall Product Liking



**Gaining Clarity Through On-Demand Behavioral Research**

**Focus Your Strategy**

**Empower Decision Making**



**Fuel Disruption**



# InsightsNow® Booth 13

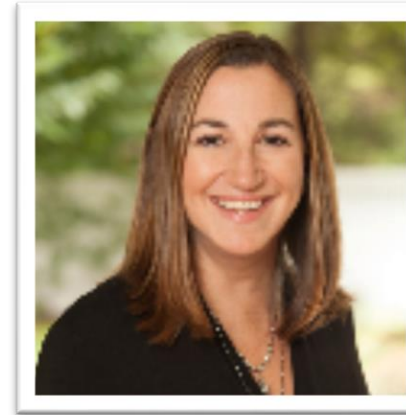


**Sarah Kirkmeyer**

Senior Director, Client Partner,  
InsightsNow

[Sarah.Kirkmeyer@insightsnow.com](mailto:Sarah.Kirkmeyer@insightsnow.com)

541-757-1404 ext 122



**Karen Lynch**

Senior Director, Innovation Research  
Insights, InsightsNow

[Karen.Lynch@insightsnow.com](mailto:Karen.Lynch@insightsnow.com)

541-757-1404 ext 241

