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innovation

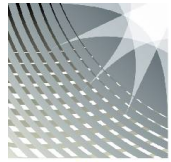
# WHAT IS 'NATURAL'

(conference paper Singapore 2008)

# We are INNOVATION ENABLERS

We integrate a strong sensory orientation & professional sensory evaluation skills, into our innovation processes.

We deliver client-tailored, consumer-centric solutions.



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The 'ideation' logo features a blue background with a pattern of white, overlapping diamond shapes. The 'mint innovation' logo is in the top right corner. The word 'ideation' is written in large white letters, with 'product service communication' in smaller white letters below it.

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innovation

**ideation**  
product service communication

The 'insights & strategies' logo features a green background with a pattern of white, overlapping diamond shapes. The 'mint innovation' logo is in the top right corner. The words 'insights & strategies' are written in large white letters, with 'business consumer & brand' in smaller white letters below it.

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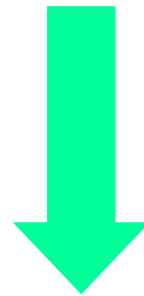
**insights &  
strategies**  
business consumer & brand

The 'futureSense' logo features a red background with a pattern of white, overlapping diamond shapes. The 'mint innovation' logo is in the top right corner. The words 'futureSense' are written in large white letters, with 'predictive sensory evaluation' in smaller white letters below it.

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**futureSense**  
predictive sensory evaluation

**DOUBT**



**CERTAINTY**

**OBSERVATIONAL**

**&**

**EXPERIMENTAL**

**The future is  
already here – only  
unevenly  
distributed.**

william gibson, neuromancer

WHAT DOES THIS WORD MEAN TO YOU ?

**SPICY**



## WHAT DO THESE WORDS MEAN ?

PURE ?

NATURAL ?

ORGANIC ?

FRESH ?

**PLEASE RANK THESE CONSUMER  
GOODS CATEGORIES IN ORDER OF  
NATURALNESS ?**

**FRUIT JUICE ?**

**CIGARETTES ?**

**SOYMILK ?**

**WHISKY ?**



## **RANKING IN ORDER OF NATURALNESS** Women

**SOYMILK &  
FRUIT JUICE**

**WHISKY &  
CIGARETTES**

## **RANKING IN ORDER OF NATURALNESS** Men

**WHISKY**

**SOYMILK  
& FRUIT JUICE**

**CIGARETTES**

**PLEASE RANK THESE CONSUMER  
GOODS CATEGORIES IN ORDER OF  
NATURALNESS ?**

**COSMETICS ?**

**SKIN CARE ?**

**LAUNDRY ?**

**CLOTHING ?**



## RANKING IN ORDER OF NATURALNESS **Women**

SKIN CARE  
CLOTHING  
SKIN CARE  
LAUNDRY  
COSMETICS

## RANKING IN ORDER OF NATURALNESS **Men**

CLOTHING  
COSMETICS  
SKIN CARE  
LAUNDRY

## Consumers & their views

- Dangerous to expect an understanding of peoples attitudes and values to predict consumption of specific food / predict attraction to a particular claim.
- Because espoused attitudes ARE NOT consistent with behaviours and values are less stable than you might expect.

SAY v DO

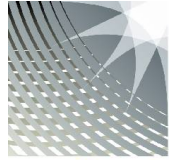
## Traditional research

- Assumes brain is connected to mouth / that people know what they want and why they want it...
- Assumes *behaviours* follow *attitudes*, which follow *values*... NOT SO – behaviours rule!
- Asks people questions they can't answer...
- Asks people questions they can answer, but not meaningfully...

## People v Respondents



This is no longer a Gorilla



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OBSERVE, OBSERVE, OBSERVE

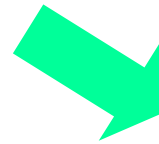
**TALK LESS &  
WATCH MORE**

## What's going on ?

- Consumers are increasingly confused by labeling.
  - There is no consistent understanding / meaning of the words we've all been using.
  - They believe they have been / are being lied to.
- Overload
  - Cynicism
  - Misconceptions
  - Myths
  - Intertwining of issues – health and environment

## Artificial / Synthetic Ingredients

- Every study from late 80s to the present day has shown that consumers increasingly reject synthetic / industrialised production



increasing perception that 'industrialised' production reduces nutritional value...



Many want to know the extent of processing of natural ingredients



## What's going on ?

Everywhere, at the very least, 'processing' is a low-key nagging concern that impacts purchase dependent on category.

- growing consumer interest for products which preserve health and well-being
- greater need for authenticity – so called ‘realness’
- ‘natural’ has had it’s day and anyway no-one knew what it meant !
- organic / pesticide-free is in – even when you might least expect it

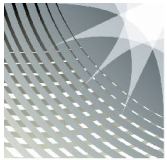
## What's growing ?

Interest in organically produced food is increasing throughout the world in response to concerns about intensive agricultural practices and their potential effect on human health as well as on the environment.



## Some Snapshots

- Packaged Facts estimates 'natural' food sales will reach \$12.9bn this year
- Natural/Organic skin care, hair care and color cosmetics markets will increase by 9% a year (total cosmetics and toiletries sector grow by only 1% a year to 2009): Euromonitor
- In 2006/7 33% of Bangkok residents regularly bought Organic produce.
- THE MORE AUTHENTIC / LESS PROCESSED / LESS MANIPULATED SPACE IS COMING – AND SOME !



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Brave

A photograph of a Diet 7UP can on the right, set against a background of a lemon tree with green leaves and yellow lemons. The can is green with the white 7UP logo and a red cherry. A yellow banner on the can reads "Now 100% Natural". The bottom of the can has the text "Now Crispy, Refreshing" and "Diet 7UP".

**NOW 100% NATURAL.**

DIET 7UP, NOW MORE LEMON LIME TASTE.

The famously crisp, refreshing taste of 7UP® is now better than ever, because it's been stripped of the artificial stuff found in most other soft drinks. Pick one up today.

# Step Back





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Credible ? Possible ? Probable ?



## Consumers & their views

- FAMILIES TALKING ABOUT FOOD AND FOOD CHOICES positively: *...when discussing favourably (why I like, why I buy)*
  - Sensory characteristics most frequently mentioned criteria
  - Practicality 2<sup>nd</sup> most frequently mentioned (ease of use, quick, etc.)
  - How it's good for me, 3<sup>rd</sup> most mentioned...

**SENSORY &  
CONVENIENCE**

## Consumers & their views

- FAMILIES TALKING ABOUT FOOD AND FOOD CHOICES negatively: ...when discussing unfavourably (why I don't like, why I don't buy)
  - Unnaturalness – what I know about the food in terms of ingredients and processing
  - Including some sensory criteria – appearance (colours too bright, etc.)
  - Poor quality (e.g. fatty, oily, smelly)

# UNNATURALNESS

## Consumers & their views

- TALKING TO FAMILIES ABOUT FOOD AND FOOD CHOICES:
  - SENSORY EXPERIENCE  
(When talking about what they do like / buy).
  - RECEIVED WISDOM  
(Knowledge & attitudes towards level of processing, additives, unethical methods, pollutants, etc. when talking about what they don't like / buy).

**INCONSISTENT**

## Consumers & their views

- TALKING TO FAMILIES ABOUT FOOD AND FOOD CHOICES:
  - DOUBTS, acknowledged inconsistencies, irrational justifications are WIDESPREAD.
  - People are not sure, CAN'T EXPLAIN THEIR BEHAVIOUR, they are not confident in their own knowledge, behaviour and attitudes – people are unsure what their values are...

HELPLESSNESS



- Consumers can not articulate their sensory experiences
- They apply incorrect terminology to describe experiences
- What is sweet for me is not for you
- Real preference drivers can be subconscious
- 30% of people fail discriminant testing – *around the world*
- Remember spicy – what does that mean !

# CERTAINTY

# EXPERIMENTAL