



Exploring the territory of natural and organic cosmetics

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Background

People's lives are affected by the world around them. Consumers react to these changes by **changing their values and lifestyles**. Changing values and lifestyles give rise to changing needs. Consumers look to companies, brands, products and services **to serve these changing needs**.

As an international non-profit association, **Natrue** provides a home to all true friends of Natural and Organic Cosmetics. NATRUE has the goal of **promoting and protecting natural beauty and skin care products** to the benefit of consumers worldwide.

Objectives

The research objective was to explore **what consumers expect from natural and organic cosmetics**. The study focused on:

- Drivers and barriers for purchasing NOCs
- Associations with NOCs
- Differences in perception of the terms natural and organic
- Familiarity with labels and importance and reliability of those labels
- Evaluation of the NATRUE label



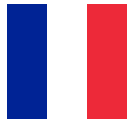
Target group: we selected only women who take into account the presence of natural and organic ingredients when purchasing cosmetics



EU women; 25-65 years old

Purchase cosmetics and have interest in NOCs

Mix EU countries (geographical spread and size)





How were consumers studied?



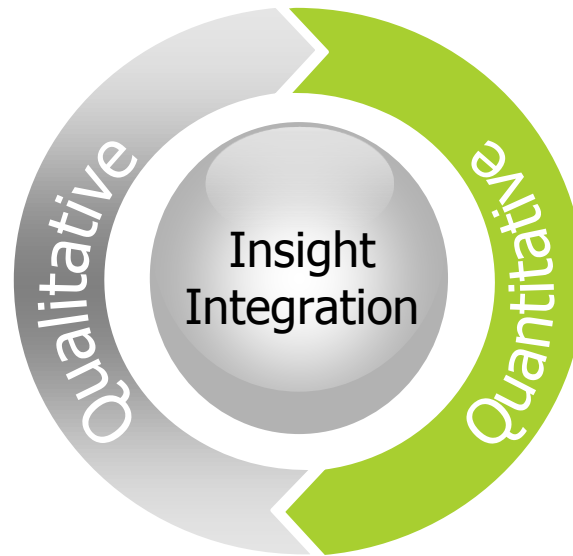
Qualitative

Two focus groups

8 female participants per focus group

Interest in NOCs

Northern/Southern EU groups



Quantitative

Validation of findings from qualitative research

Online survey

6 European countries

Females (n = 900)

Purchase drivers and associations with NOCs



Looking at purchase drivers in general, we see that the presence of natural and organic ingredients is especially important for facial and body care



	Total	Showergel	Facial care	Bodycream, bodyoil, bodylotion	Deodorant	Make-up	Make-up remover	Hair care
Contains only natural ingredients	79%	47%	64%	56%	43%	47%	46%	47%
Is not tested on animals	75%	58%	63%	60%	58%	61%	57%	58%
Contains no chemical ingredients	72%	47%	57%	53%	47%	49%	47%	48%
Is not polluting	66%	49%	46%	46%	50%	43%	42%	48%
Is not harmful to animals	65%	51%	52%	51%	51%	51%	48%	52%
Contains only organic ingredients	64%	35%	49%	44%	31%	37%	34%	38%
Contains no aluminium	64%	31%	34%	33%	51%	32%	31%	31%
Contains no parabens	64%	43%	49%	47%	39%	43%	39%	44%
No ingredients of animal origin	64%	47%	53%	51%	45%	49%	45%	47%
Is produced with respect to people	63%	49%	52%	50%	47%	48%	48%	50%
Contains essential oils	60%	29%	27%	43%	15%	14%	15%	28%
Does not contain GMOs	60%	44%	49%	47%	44%	44%	42%	43%
Does not contain sulphides	57%	36%	39%	37%	34%	36%	35%	39%
Is packed in a recyclable packaging	51%	38%	37%	37%	35%	33%	32%	38%
Contains herbs	47%	24%	23%	25%	15%	14%	15%	31%



As the purchase drivers show, the use of NOCs is for a large part inspired by a motivation of avoiding negative outcomes



- For yourself → avoid harmful/unsafe ingredients: chemical ingredients or ingredients that might have side effects (eg. aluminium, parabens)/a negative impact on health
- For others → avoid harmful and underpaid work conditions (Fairtrade)
- For animals → avoid products tested on animals and with ingredients of animal origin
- For the environment → avoid heavy impact of production processes on the environment



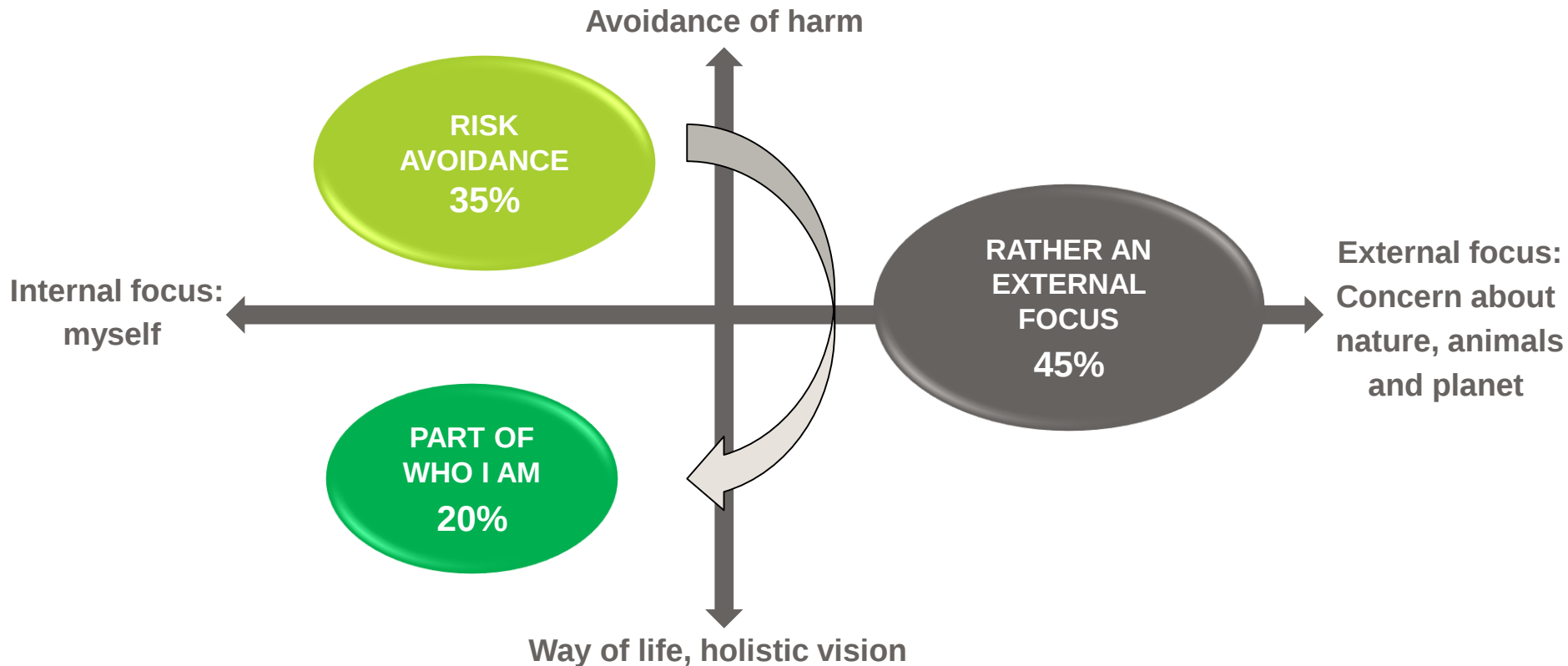
...yet while risk a negative driver is often the reason for starting to use NOCs, continued use of NOCs is based on positive experiences and associations



- Through the use of NOCs, women feel that they are taking part in making this world a **better place**, which makes them **proud**
- They feel like “**doing the right thing**” or feel more **connected** to the planet
- NOCs are regarded as **the best long-term choice for oneself and**



Within the group of users of NOCs, we can identify 3 different subgroups: for one group, risk avoidance remains key to the use of NOCs; others have gone on to more positive drivers





Identifying 3 consumer subgroups



RISK
AVOIDANCE
35%

Need: avoid
harm for
themselves
(no chemical
ingredients)

Result: heavy
ingredient
screening

RATHER AN
EXTERNAL
FOCUS
45%

Need: avoid negative
outcomes for others
(animals, planet, other
people)

Result: screen for
information on
origin and
production process

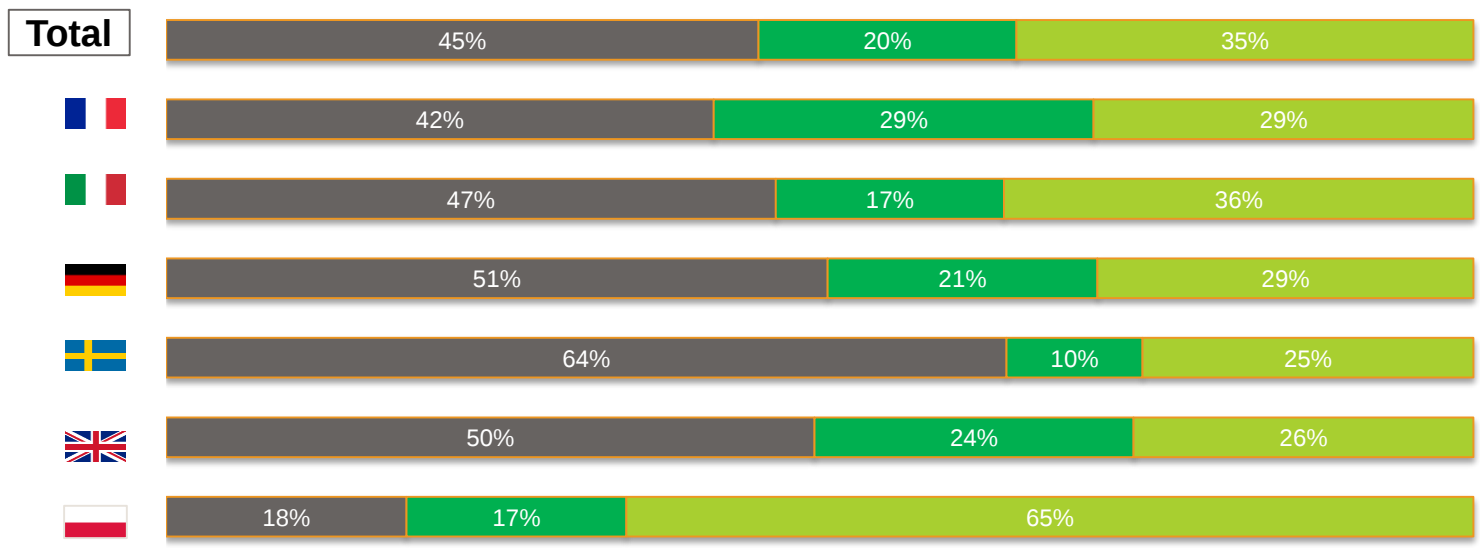
PART OF
WHO I AM
20%

Need: to avoid
artificiality in all
aspects of life

Result: using NOCs
because these fit
their healthy and
natural lifestyle

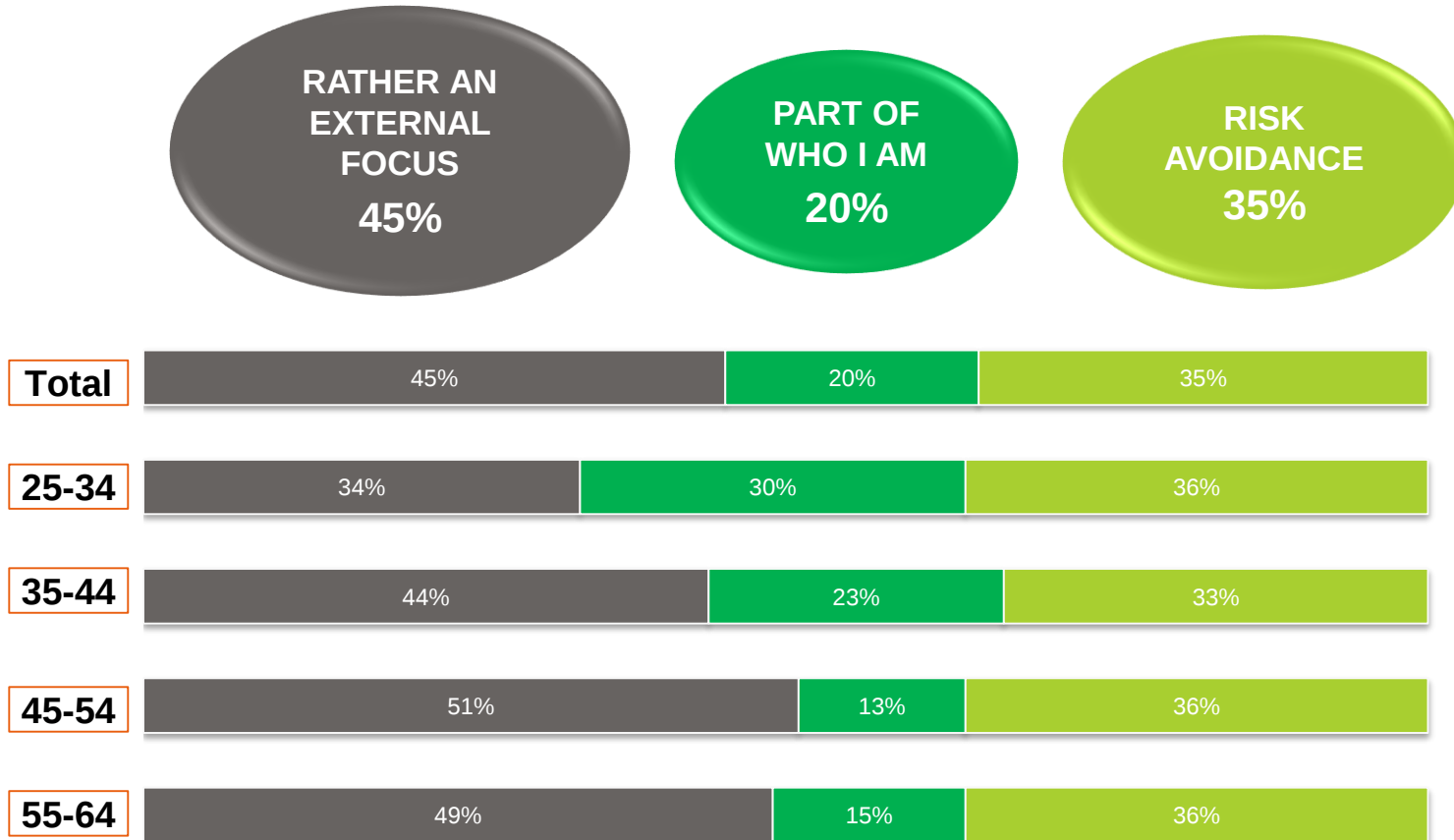


The risk avoidance group is clearly larger in Poland vs other countries: NOCs seems less established in emerging countries



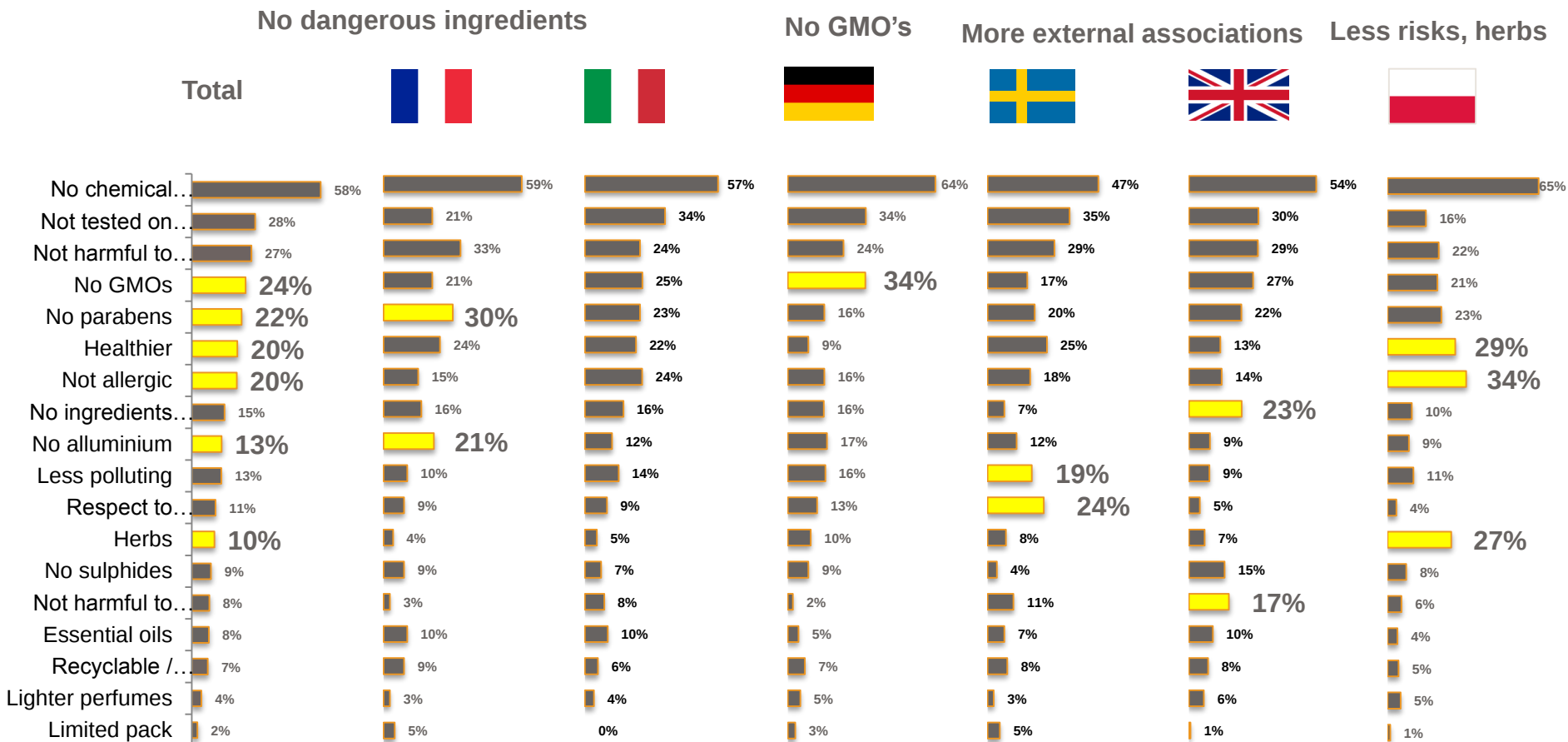


The group with a more holistic view on NOC's is slightly higher among younger women, the group with external focus is relatively overrepresented among 45+





Note that associations with NOCs depend on cultures/degree of development of markets





Group 1: Risk Avoidance (for one's self)

- Remains the focus of women in eastern EU
- 2.5 times greater than western EU
- Unchanged across all ages 25-64 years old

Group 2: External Focus (concern for Nature/Planet)

- Primary focus of 1/2 to 2/3 women in Northern EU countries
- Swedish women have highest external focus (64 %)
- Highest in women aged over 45 years old

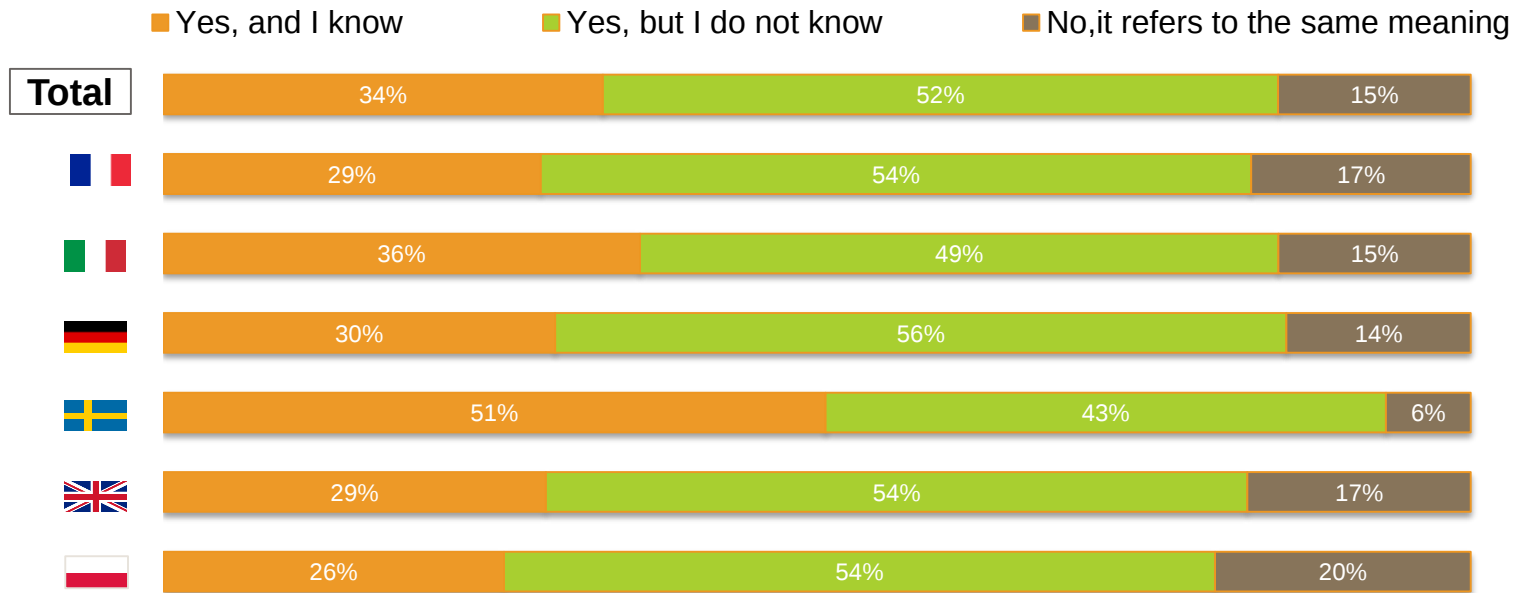
Group 3: “Part of a healthy and natural lifestyle”

- Highest representation (ca. 1/3) in younger women

Natural & Organic: understanding of the difference



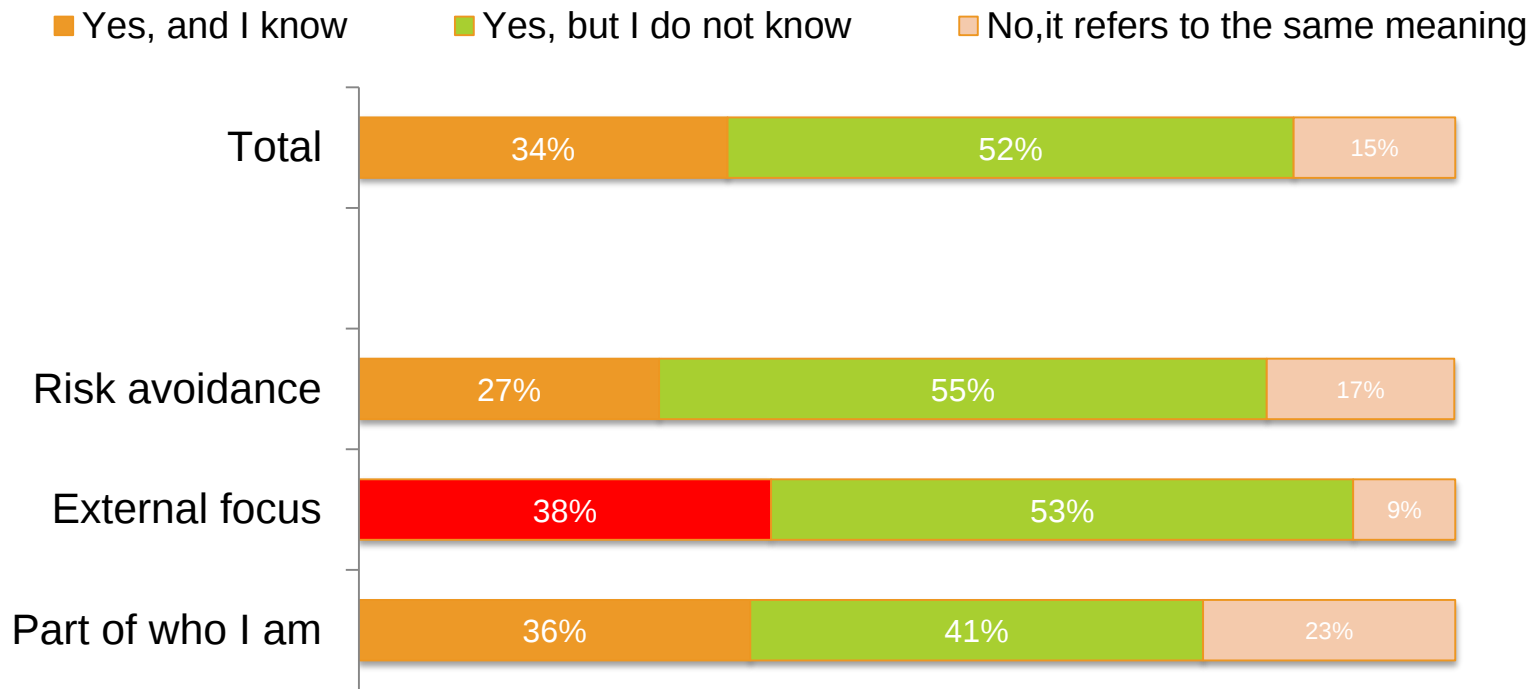
Most women are aware that there is a difference between 'natural' and 'organic', but only 1/3 claims to know what the difference is exactly



- 85 % of all women know a difference exist between natural and organic
- Swedish women are more familiar with the difference between organic and natural (50 %) and Polish women are less (26 %)



Women with a rather external focus/more holistic vision about NOCs have a higher awareness that there is a difference between N&O and that they know what the difference is

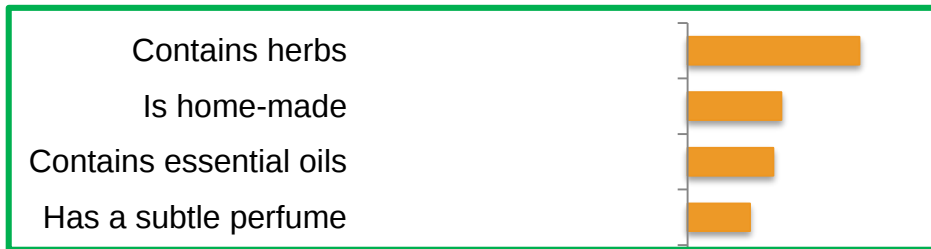




Natural and Organic: Associations and Differences

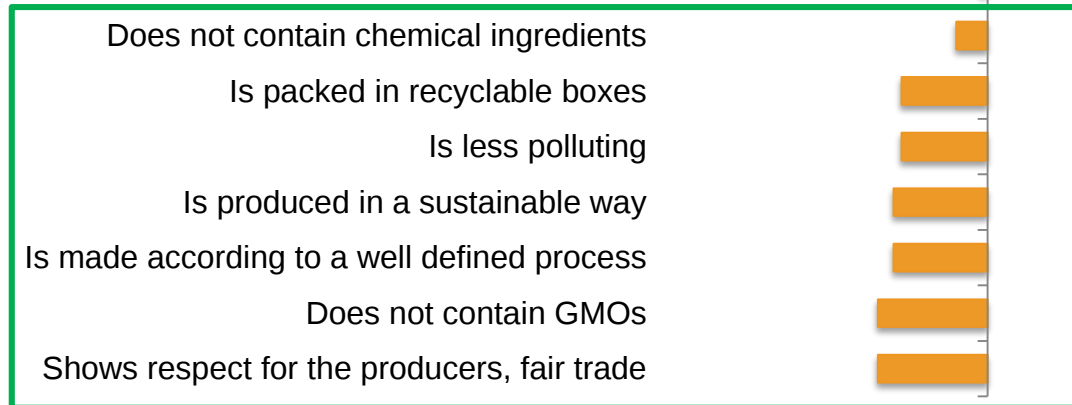


Associated
with natural



Is not allergic
Is not tested on animals
Does not contain ingredients of animal origin
Is not harmful to me
Has a better quality

0%
0%
0%
0%
-5%



Associated
with organic

Labelling: awareness, importance and trustworthiness, and evocation of logo's



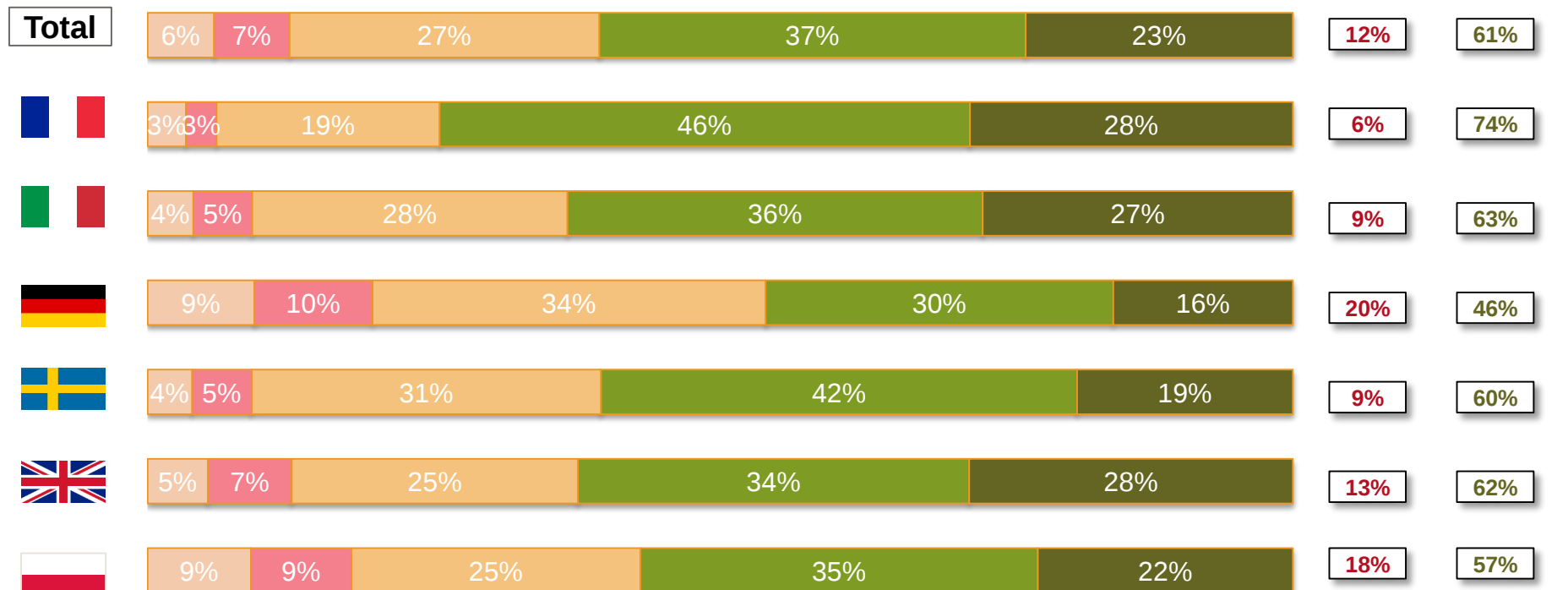
Over 60% of consumers are reassured by the presence of Labels on NOC



Not at all (1) (2) (3) (4) Very much (5)

Bottom 2

Top 2





NATRUE Label: awareness and evokation



- 1/5 consumers (18%) declares to know the NATRUE Label - *for benchmark Ecocert 17%*
- Among those the 49% declares to pay attention to it when purchasing - *for benchmark Fairtrade 48% - EU organic leaf 50% - Ecocert 60%*
- The most associated word by looking at the NATRUE label is “trust” (21%) followed by “reassuring when buying” (18%) and “peacefulness” (11%)

Conclusions



Messages to take home



- the presence of natural and organic ingredients is especially important for facial and body care
- the use of NOCs is for a large part inspired by a motivation of avoiding negative outcomes but continued use of NOCs is based on positive experiences and associations
- we can identify 3 different subgroups of consumers: “risk avoidance”; “external focus” and part of who I am”
- Most women are aware that there is a difference between ‘natural’ and ‘organic’, but only 1/3 claims to know what the difference is exactly
- Over 60% of consumers are reassured by the presence of Labels on NOC



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