



# NATRUE consumer study on attitudes to Digital Labeling



September, 2022

## Background

Consumers are looking to make **more sustainable choices** and also wish for **greater transparency** about the substances used in products, their origin / sourcing, manufacturer, social and environment impact.

Whilst **information on-pack** can help to orientate consumers **e-Labeling** can help to **expand a consumer's awareness** and further promote transparency:  
**E-Labeling** can be **complimentary to on-pack information** or as an **alternative option**. E-Labeling can be **invaluable to the NOC sector** (e.g., fragrance allergens listing and/or explanation + details related to sustainability, labels used etc.). Nevertheless, e-Labeling and digital information can also **spread misinformation** and **risk consumers' misunderstanding**.

## Objectives

Understanding **consumers perception, expectation, fulfilment & trust** regarding **digital tools** when it comes to **product information, claims and Labeling**.

## Hypothesis

- Consumers are faced with **increasing information on-pack** (e.g., ingredient list declarations) will **distrust**
- Consumers are faced with too much information on-pack and **more information should be placed off-pack**.
- Consumers' distrust and/or confusion can **lose trust** when their **expectations of green products are not matched** with what is being delivered in-general – greater clarity and transparency being a known driver.

Whilst **information on-pack** can help to **orientate** consumers **e-Labeling** can help to **expand a consumer's awareness** and further promote **transparency**.  
**E-Labeling/ a specific platform** can be used **complimentary to on-pack information** or as an **alternative option**.

# Topics covered in this research



## Research Design & Sample



## Category & Brand Usage

Categories and Brands  
used P6M



## Consumer Attitudes

Usage and Attitudes  
towards on- & off-  
pack information  
aspects



## INCIs Test

Compellingness,  
Clarity & Purchase  
Intent influenced by  
old vs. new INCI



## Digital Labeling Concept

Evaluation of the  
potential platform  
and app



# Study specifications and target group



## What?

- **Online survey using access panels:** 15 minutes questionnaire length
- Mobile friendly



## Who?

- **Both female (75%) and male (25%),** aged **18-59 years** old
- **Overall: National representative quotation** regarding age, region
- **Different personal care categories: P12M users of any of the categories**
- All to be **buyers** of personal care products in mass market channels
- All to be **non-rejectors of NOC**
- At least **25 % NOC-brand user**
- At least **15% user** who already looked for **off-pack info**



## Where?

- Germany, France



## How many?

- Total Germany n=1007
- Total France =1001



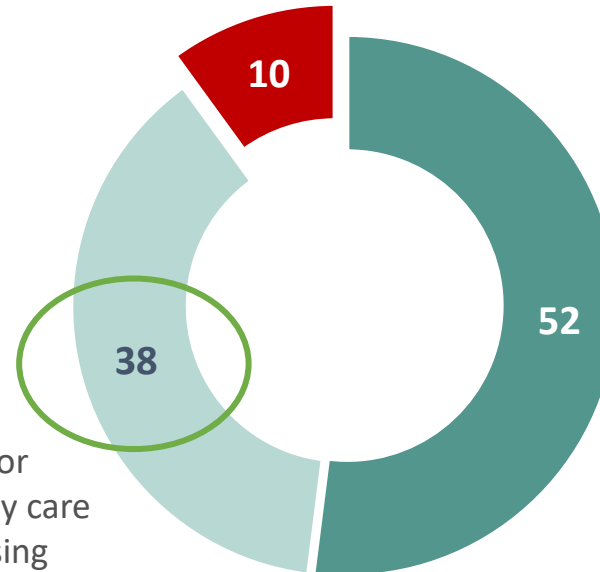
In Germany 52% currently use NOCs and a further 38% would consider using them in the future



## NOC – Potential and Rejectors in %



I'm **NOT** using natural and/or organic personal and beauty care products and do **NOT CONSIDER** using them.



I already **USE** natural and/or organic personal and beauty care products.

I'm **NOT** using natural and/or organic personal and beauty care products, but **CONSIDER** using them in the future.



Rejector were **screened out** for the main survey.  
Gross sample consists of **German based** people, **18-59** years old, working in **certain industries** and **used** at least one **personal care category** themselves in the **past 6 months**.

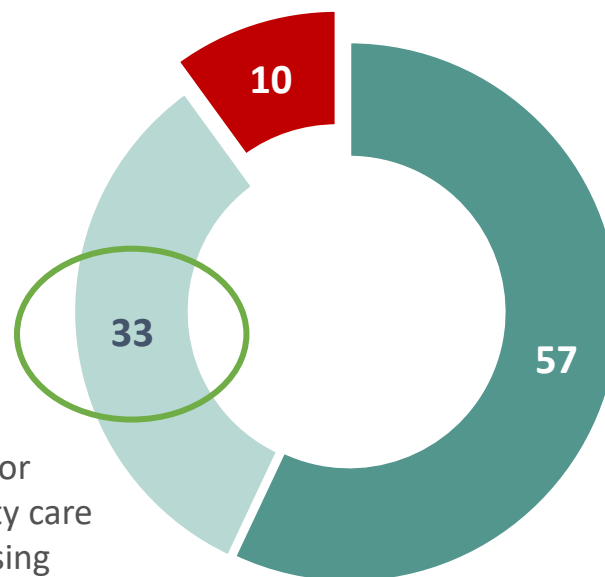
In France, 57% of shoppers currently use NOCs and a further 33% would consider using them in the future.



## NOC – Potential and Rejectors in %



I'm **NOT** using natural and/or organic personal and beauty care products and do **NOT CONSIDER** using them.



I already **USE** natural and/or organic personal and beauty care products.

I'm **NOT** using natural and/or organic personal and beauty care products, but **CONSIDER** using them in the future.



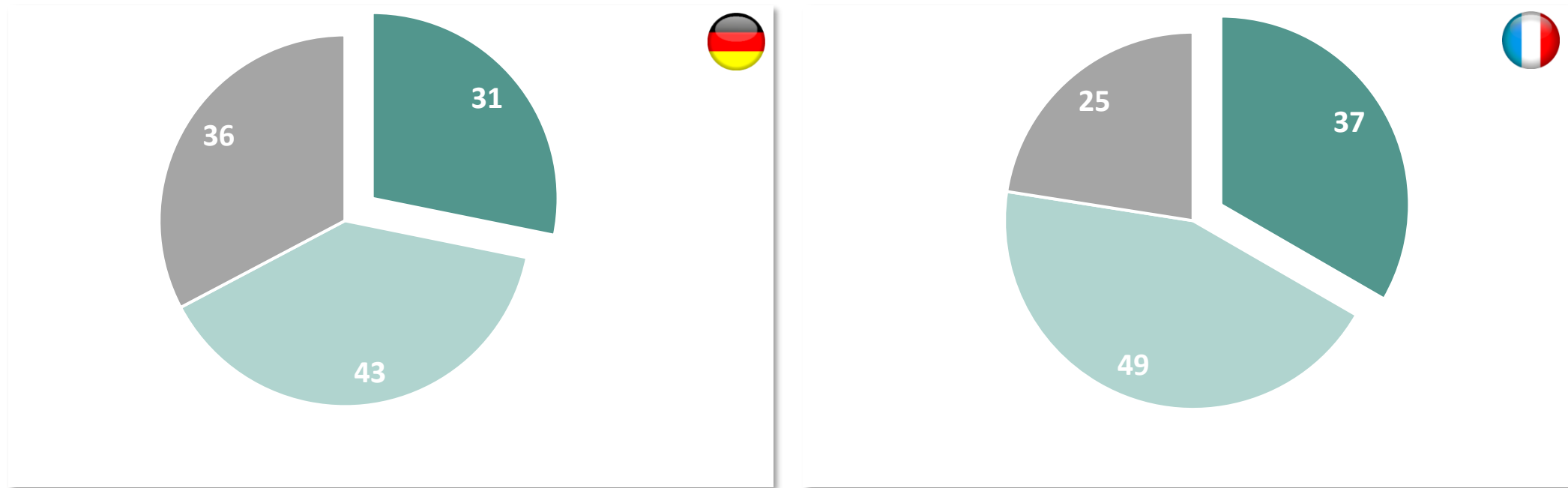
Rejector were **screened out** for the main survey.

**Gross sample** consists of **French based people, 18-59 years old, working in certain industries and used at least one personal care category themselves in the past 6 months.**

1/3 of respondents already searched for product information in other places than on the packaging.



### Off-Pack Information User in %

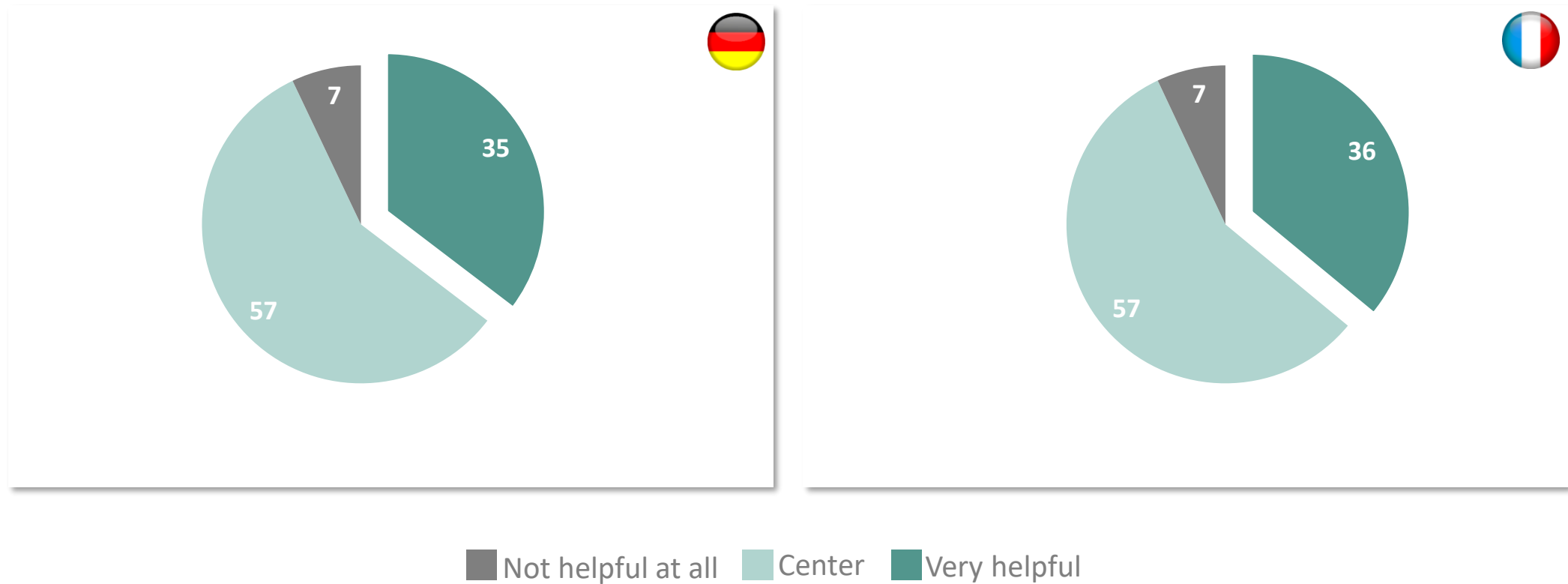


- I **searched for information** about the product in places **other than on the product packaging**.
- I looked for information about the product **on the product packaging** before or after buying it.
- I did **not check any product** information in specific.

1/3 of respondents would find more off-pack info very helpful with over half of shoppers remaining undecided indicating that shoppers are essentially open to new sources of information.



## Off-Pack Information User in %

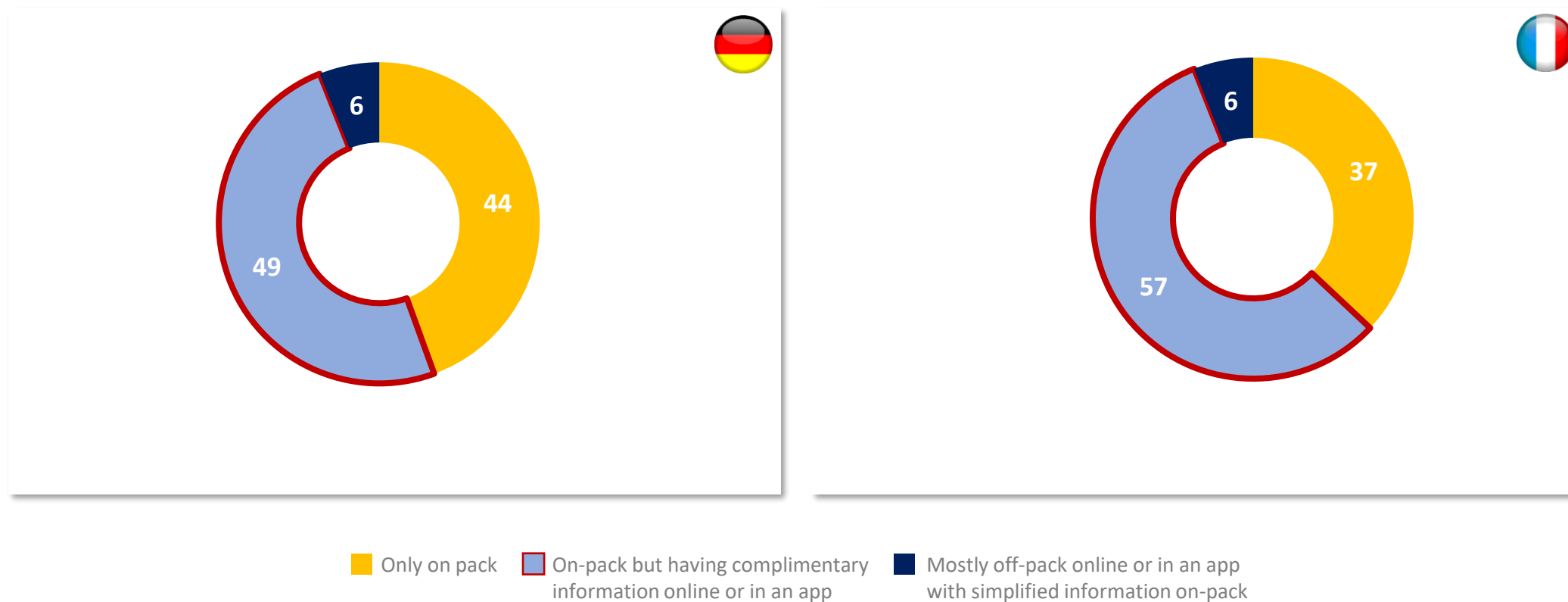


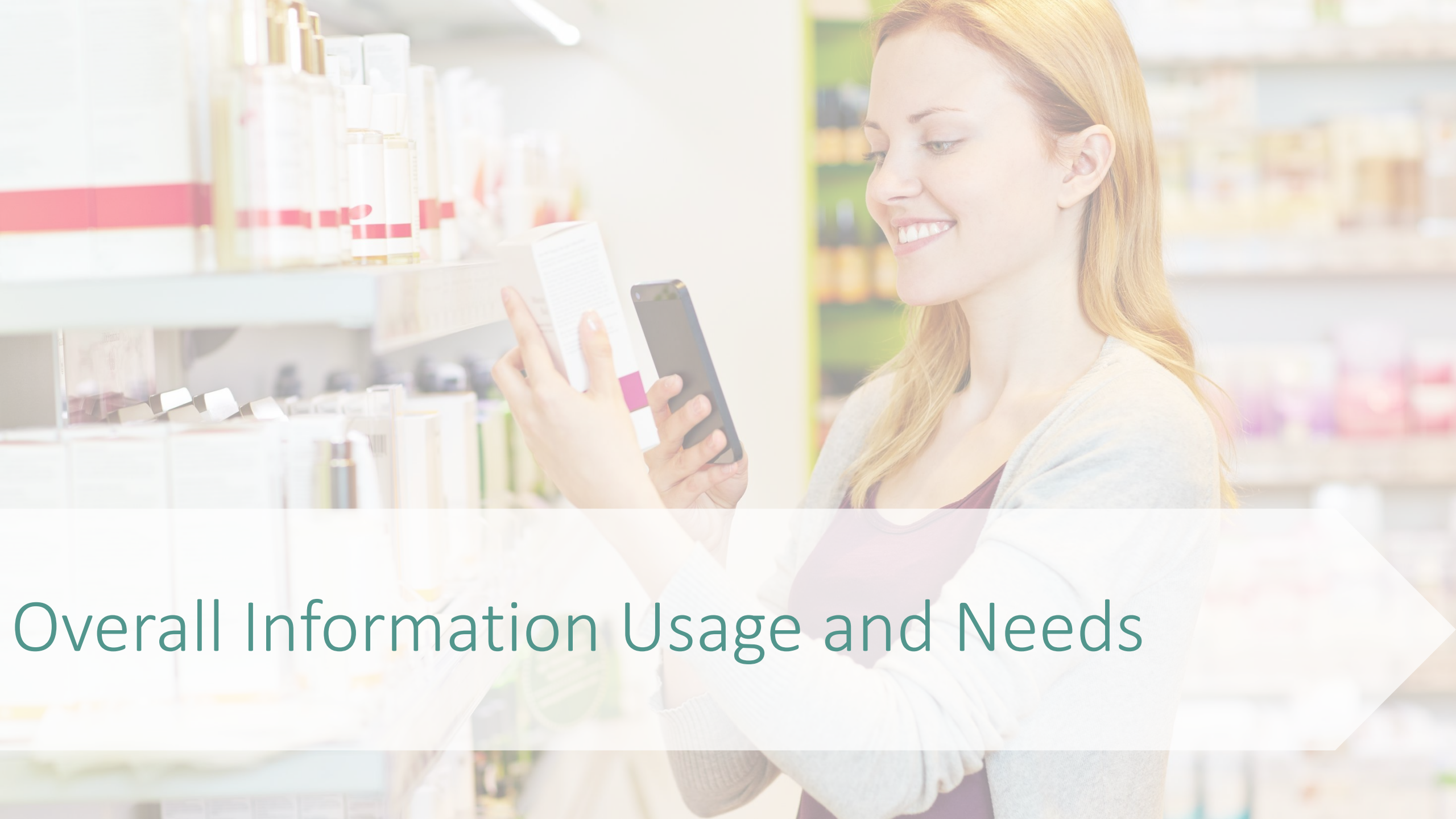


## In fact, consumers would wish for more information off-pack (complimentary and/or mostly off-pack)



### Preferred source of information in %





Overall Information Usage and Needs

Looking at the average shopper, price and skin type suitability score first, the list of ingredients is considered as 3<sup>rd</sup> criterium for purchase.



Product information used before purchase – Total in %

Very important

# 1 Price

# 2 Skin type suitability

# 3 Ingredients list



# 4 Texture

# 5 Size of the pack

# 6 Usage advice



# 7 Certification labels



# 8 Origin of ingredients



# 9 Material of the pack



# 10 Format of the pack



Especially stronger considered by respective User



Less important

The same is also true for France, where the INCI list is the 4<sup>th</sup> criterium to buy a beauty care product.



Product information used before purchase – Total in %

Very important

# 1 Price

# 2 Skin type suitability

# 3 Texture

# 4 Ingredients list

# 5 Origin of ingredients

# 6 Certification labels

# 7 Size of pack

# 8 Usage advice

# 9 Format of the pack

# 10 Material of the pack



Especially stronger considered by respective User



Less important

Given the choice, the majority of the German shopper would prefer to have the information on-pack but with additional information available online or in an app. There is a clear need.



Preferred source of information in %

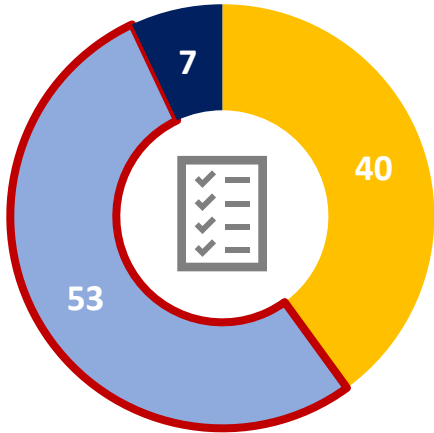
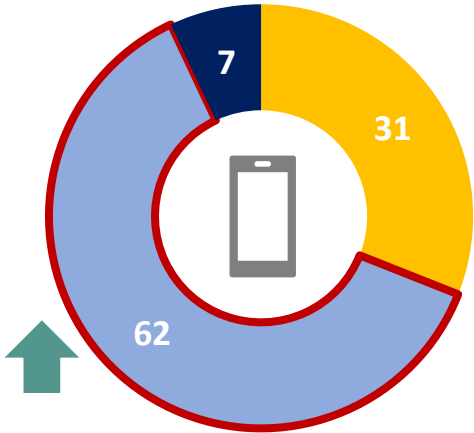
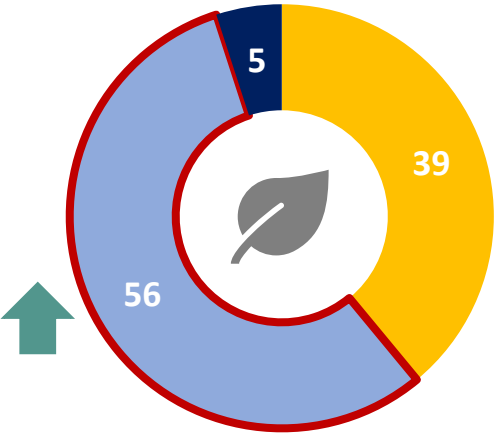
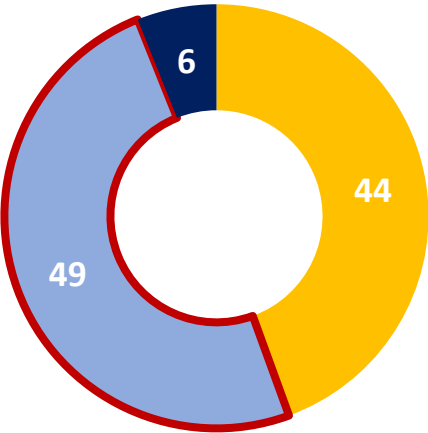


TOTAL

NOC Brand User

Off-Pack Info User

Ingredients List User



Only on pack

On-pack but having complimentary information online or in an app

Mostly off-pack online or in an app with simplified information on-pack

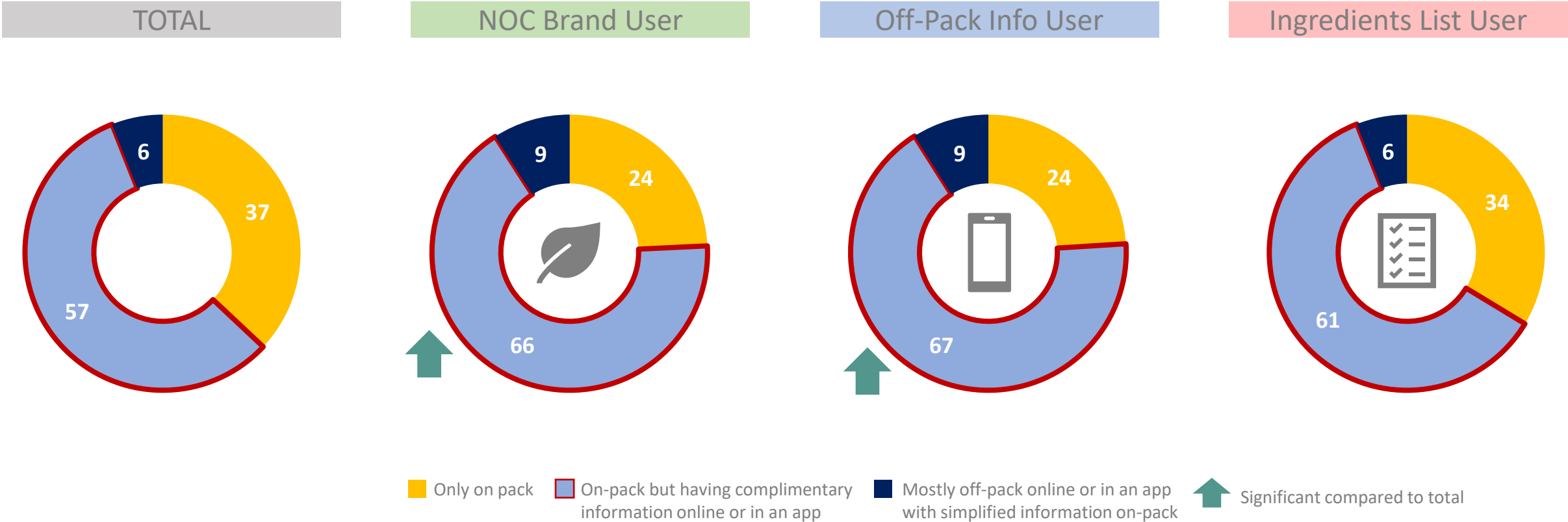


Significant compared to total

Given all options, the clear majority of French shoppers would prefer to have the information on-pack but with additional information available online or in an app. The need is clearer in France.



Preferred source of information in %

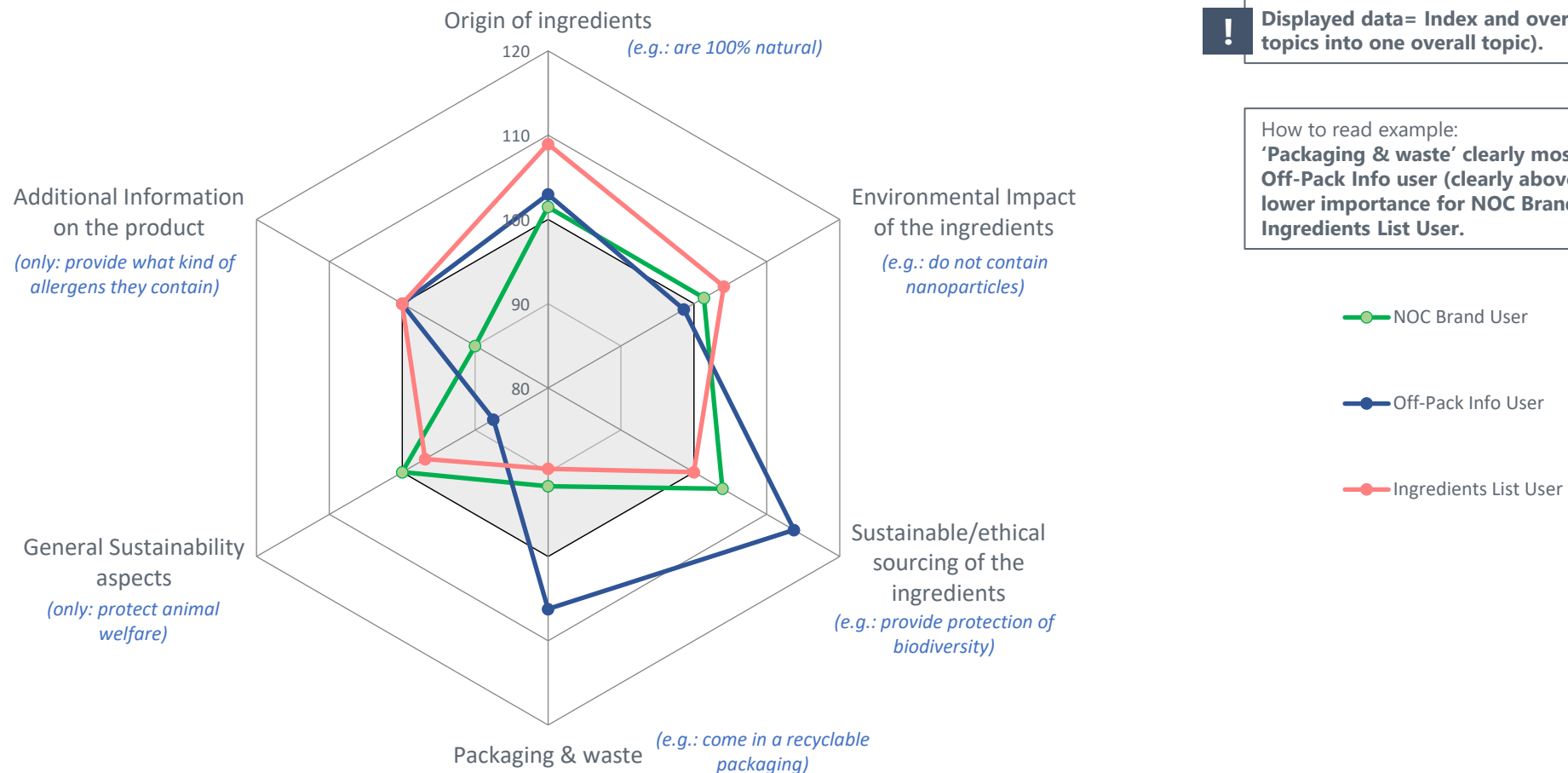




Looking at sustainability aspects, Off-Pack Info user would especially need info on packaging & waste and sourcing while INCI user look more for info on origin and environmental impact of ingredients.



## Importance of sustainability information, Index



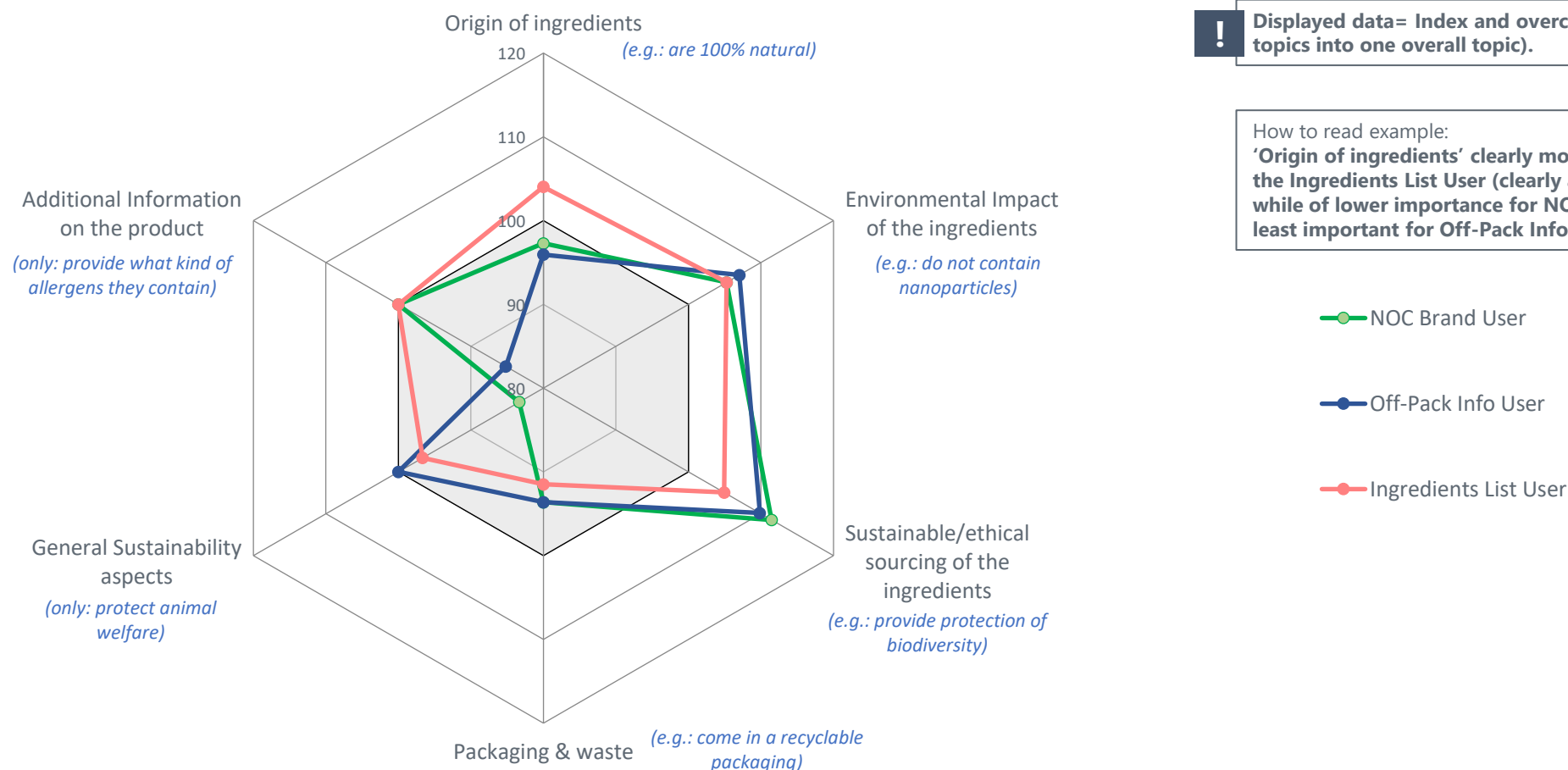
! Displayed data= Index and overcodes (clustered topics into one overall topic).

How to read example:  
**'Packaging & waste'** clearly most important for the **Off-Pack Info user** (clearly above average) while of **lower importance** for **NOC Brand User** and **Ingredients List User**.

Regarding the need of sustainability information, all target groups look for info in sourcing of ingredients & environmental aspects, while the INCI user are also more interested in the origin.



## Importance of sustainability information | Index based on Rank 1-5 evaluation



! Displayed data= Index and overcodes (clustered topics into one overall topic).

How to read example:  
**'Origin of ingredients' clearly most important for the Ingredients List User (clearly above average, while of lower importance for NOC Brand User and least important for Off-Pack Info User.**



# On-Pack Information Usage and Needs

Opportunities for (more detailed) Off-Pack Info include: Ingredients list (allergens), info regarding environmental impact, rules for certification, brands owner and acting of the manufacturer.



## Reasons for more off pack information



The ingredients list is written too small.



I often do not understand the ingredients list.



I cannot find sufficient information on allergens on the product.



I don't know which label/ certification means what.



I am interested in **ratings regarding the sustainability/ natural & organic** characteristics of the product.



I am interested if the product's characteristics/claims are **independently certified or self-declared** by the manufacturer.



I do not trust that all relevant information written on the pack.



I am interested in information regarding the environmental impact of the product.





More than 1/3 of German shoppers would find more off-pack info very helpful, especially those who already use it or those who especially consider the INCI list for their purchase decision.



Helpfulness of off-pack information in %

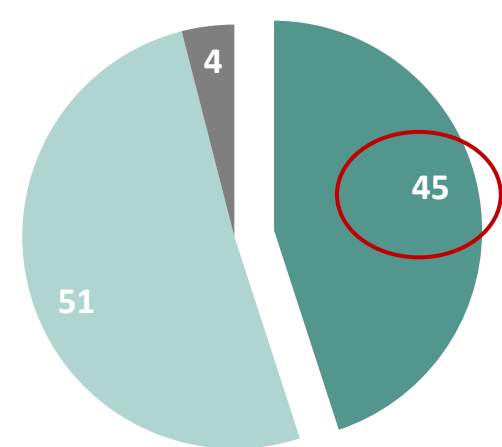
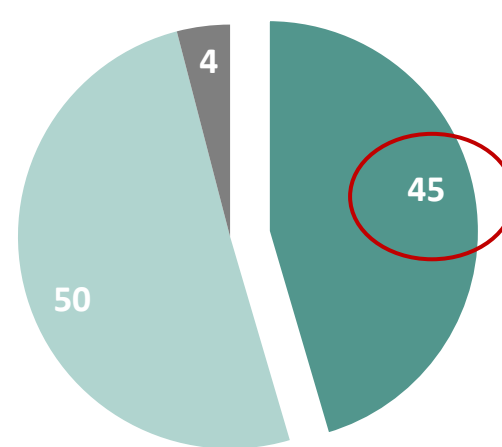
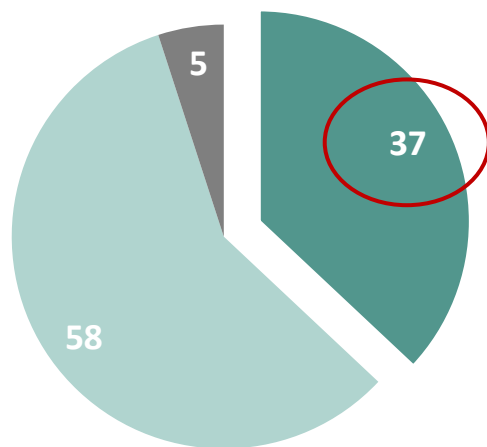
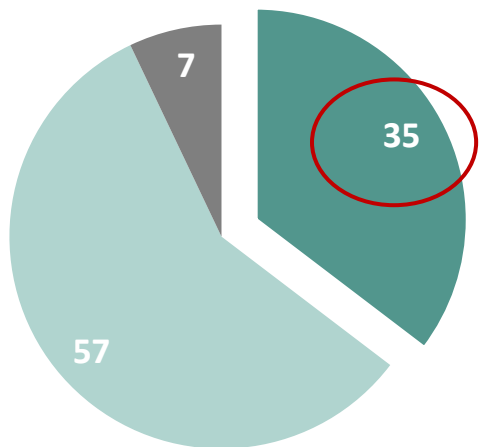


TOTAL

NOC Brand User

Off-Pack Info User

Ingredients List User



Not helpful at all Center Very helpful

In France, NOC Brand users, as well as those already using off-pack information and also INCI use, would find more off-pack information very helpful.



Helpfulness of off-pack information in %

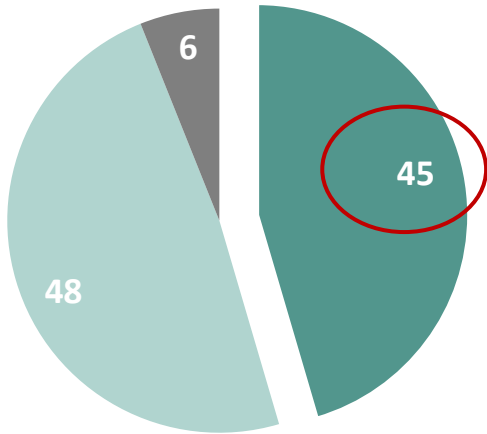
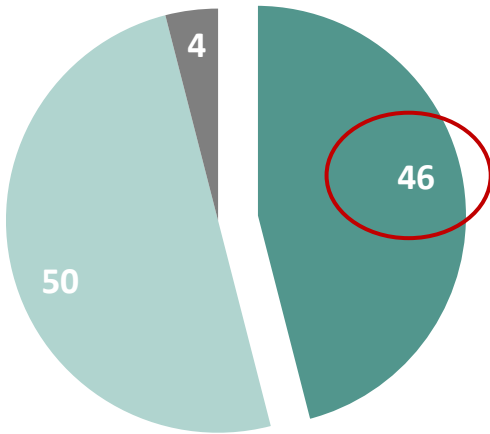
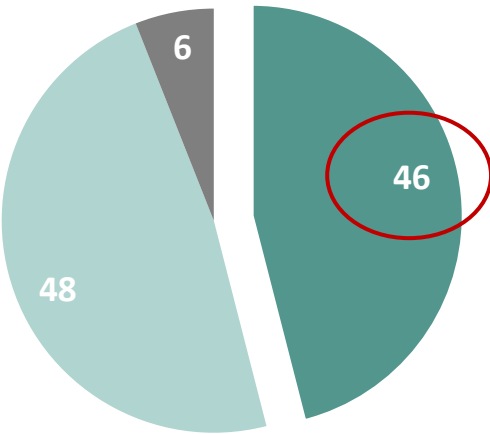
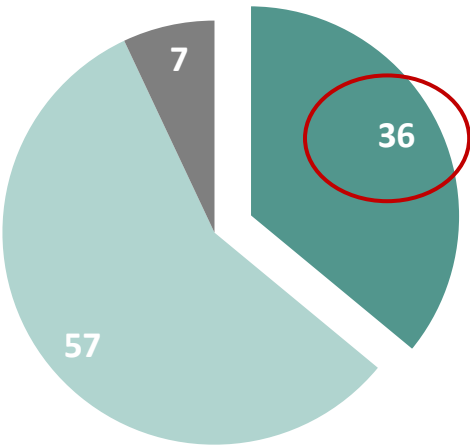


TOTAL

NOC Brand User

Off-Pack Info User

Ingredients List User



Not helpful at all Center Very helpful



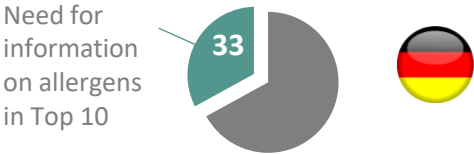


# Ingredient Listings

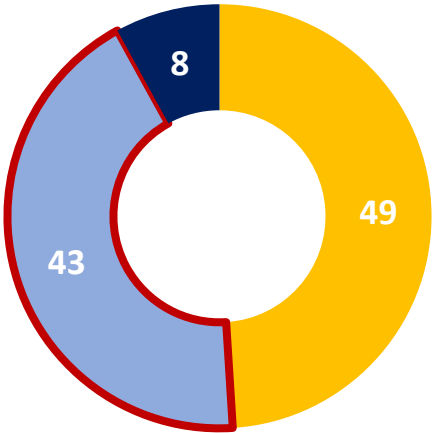
German shoppers, who have information on allergens in their top 10 needs for the purchase decision, partly prefer to have the info only on pack.



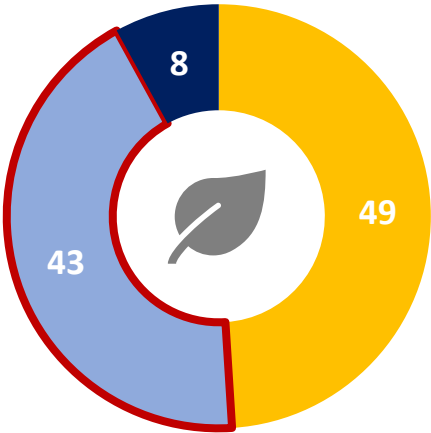
Preferred source of information on allergens in %



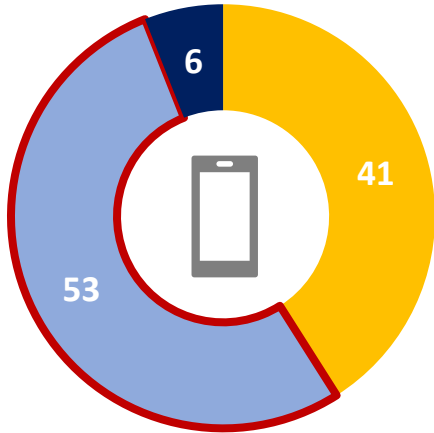
TOTAL



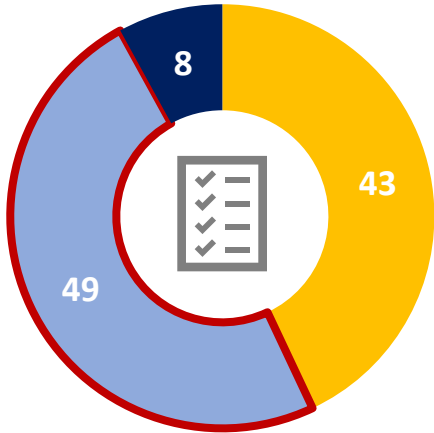
NOC Brand User



Off-Pack Info User



Ingredients List User



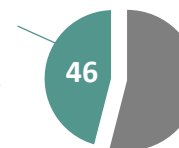
Only on pack    On-pack but having complimentary information online or in an app    Mostly off-pack online or in an app with simplified information on-pack

The majority of French shoppers, who have information on allergens in their top 10 needs for the purchase decision, would like to have the info on-pack with additional info online or in an app.



Preferred source of information on allergens in %

Need for information on allergens in Top 10

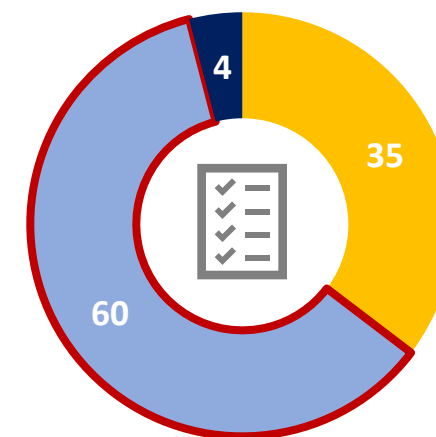
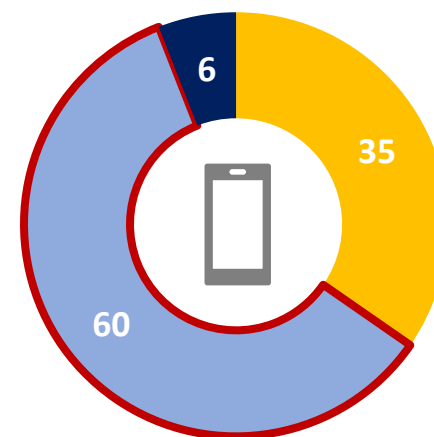
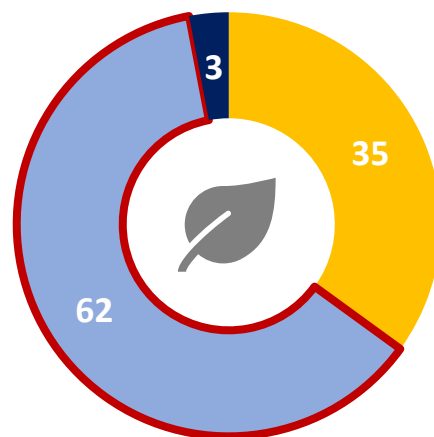
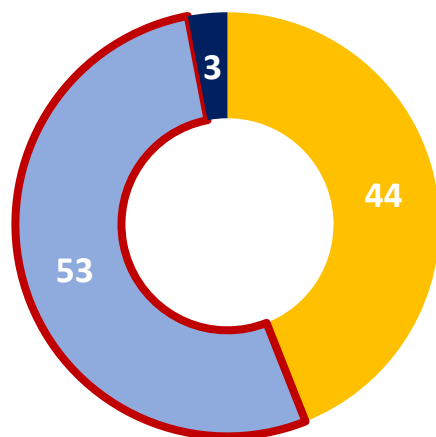


TOTAL

NOC Brand User

Off-Pack Info User

Ingredients List User



■ Only on pack
 ■ On-pack but having complimentary information online or in an app
 ■ Mostly off-pack online or in an app with simplified information on-pack



A woman with long blonde hair, wearing a grey cardigan over a maroon top, is smiling while looking at a white product box and a black smartphone. She is standing in a pharmacy aisle with shelves of various products in the background. A semi-transparent white arrow-shaped banner is overlaid at the bottom of the image.

Where do shoppers look for Off-Pack info?

Shoppers are primarily looking for a QR Code on the pack that could be scanned. The second source of information sought is the shelf: any booklet or flyer about the product available?



QR-Code/ scannable code on the product packaging



Website of the brand/manufacturer



Shelf in Store



Online ratings and reviews of the product



Product information/rating app







# Summary



## On- and Off-Pack Information

The majority of the German and French shoppers would prefer to have the relevant information:

**on-pack but with additional information available online or in an app**

**At least** info on **INCIs** and **allergens** as well as on **certification labels** should be provided **on-pack (in reduced amounts)**.

If the product pack is **not too crowded**, further info on the **most interesting elements of a product**, like **packaging & waste, sourcing, origin and environmental impact of ingredients**, could be provided **on-pack (again in a reduced form)**

In every case, **providing additional information** on all these aspects via **QR-code/ scannable information** or at the **shelf** is **highly recommended** to get greater **clarity and transparency to increase trust**.

## Ingredients List

The ingredients list is the **3rd /4th most important** aspect considered by German/French Shopper and therefore an **important purchase driver**.

For **NOC Brand Users** and **Ingredients Lists Users**, the longer ingredient list (e.g., with more allergens) are **less compelling** with **lower intention to buy**.

There is a consideration from respondents that **fewer ingredients** can be perceived as if the **product is purer or cleaner**, which is a **clear need** of NOC Brand Buyer.

## Digital Labelling

The **digital labeling platforms** and **apps** shows **high potential** to deliver the additional info.

**German shopper** would very likely **use** the digital labeling platform and app, and there is also a high potential for users to convert to digital.

**All French target groups** show a **high** intention to **use digital means with** a good potential to convert users towards digital platforms and/or apps.



- 1 Consumers wish for less crowded products – i.e. less information on the pack
- 2 Provide information via de-materialized formats, i.e. via online site or an app. Ideally as additional information (i.e. explanation of certification labels, explanation of substances – ingredients;allergens)
  - 2a Include a QR-Code scanner that links to an online source with more explanation
  - 2b Provide additional information on the shelf, via a leaflet or a booklet (*cf.* next to the products)
- 3 With less text on the pack, there's potential to use bigger font size to make elements more readable.