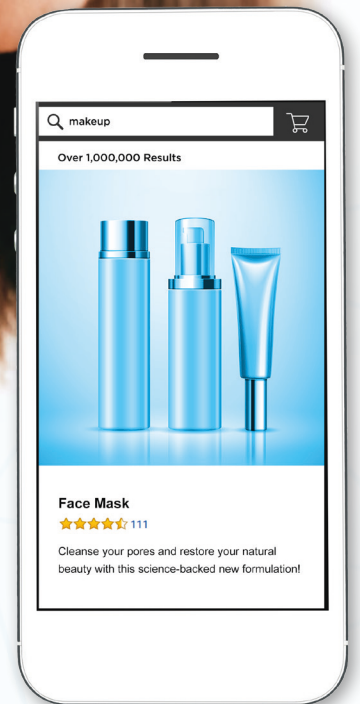


PACKAGING

and the **DIGITAL** shopper



Meeting Expectations
in Health & Beauty

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INTRODUCTION

For consumer goods companies, packaging has always been a **key driver** of purchase at retail. As more and more of the shopper's wallet has **shifted online**, it's tempting to think that the product package plays less of a role in this less tangible, digital shopping experience.

Consumer packaged goods companies consistently want to **understand how shoppers feel** about the products they purchase, why they buy online, what they buy online and what their expectations of packaging are. One big challenge marketers have is to maintain brand message, value and experience throughout multiple environments, some of which are outside the brand's control: the physical retail store, the digital shopping experience online and the physical delivered-to-door unboxing experience.

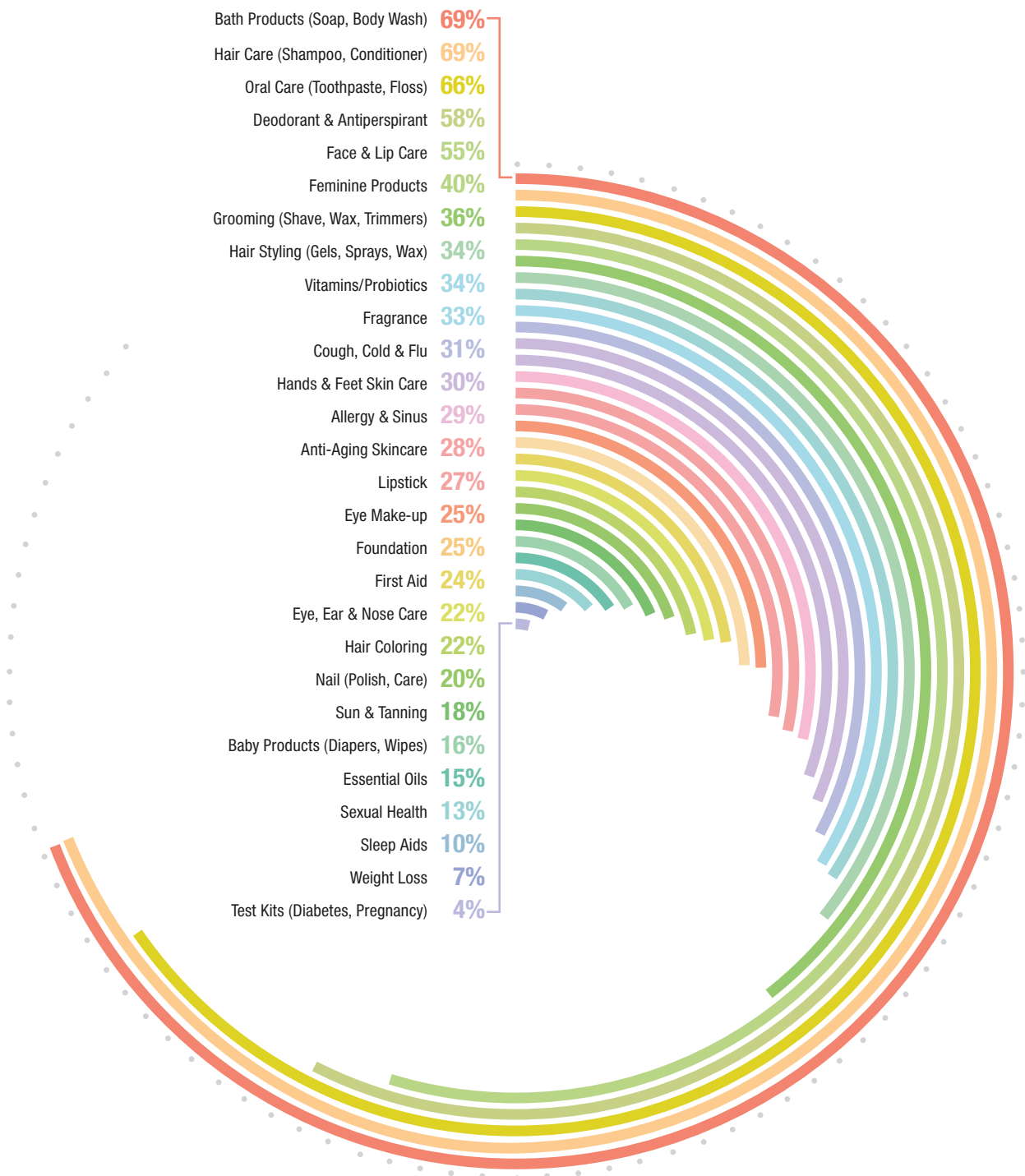
Many of the statistics in this paper regarding shopper behavior and expectations of consistency echo findings from our previous [Packaging and the Digital Shopper](#) study, which was focused on [Food & Beverage categories](#).

This paper is packed with charts, data and includes actual quotes from our survey respondents about their **fun and engaging experiences** with health, beauty and personal care packaging, as well as recent frustrating experiences. It is our aim to enlighten the reader with information that will help guide and direct their **packaging strategies** and **packaging design** choices so they can delight shoppers and consumers with **better product experiences** before, during and after purchase, whether online or offline, even as the line itself becomes increasingly blurry.

WHAT AND WHY SHOPPERS BUY ONLINE?

Most shoppers buy products specifically from hygienic categories such as **bath**, **hair care** and **oral care**. It's no surprise, then, that shoppers reportedly purchase the same types of products online. (See next page.)

Which of the following product categories have you purchased in the last three months?

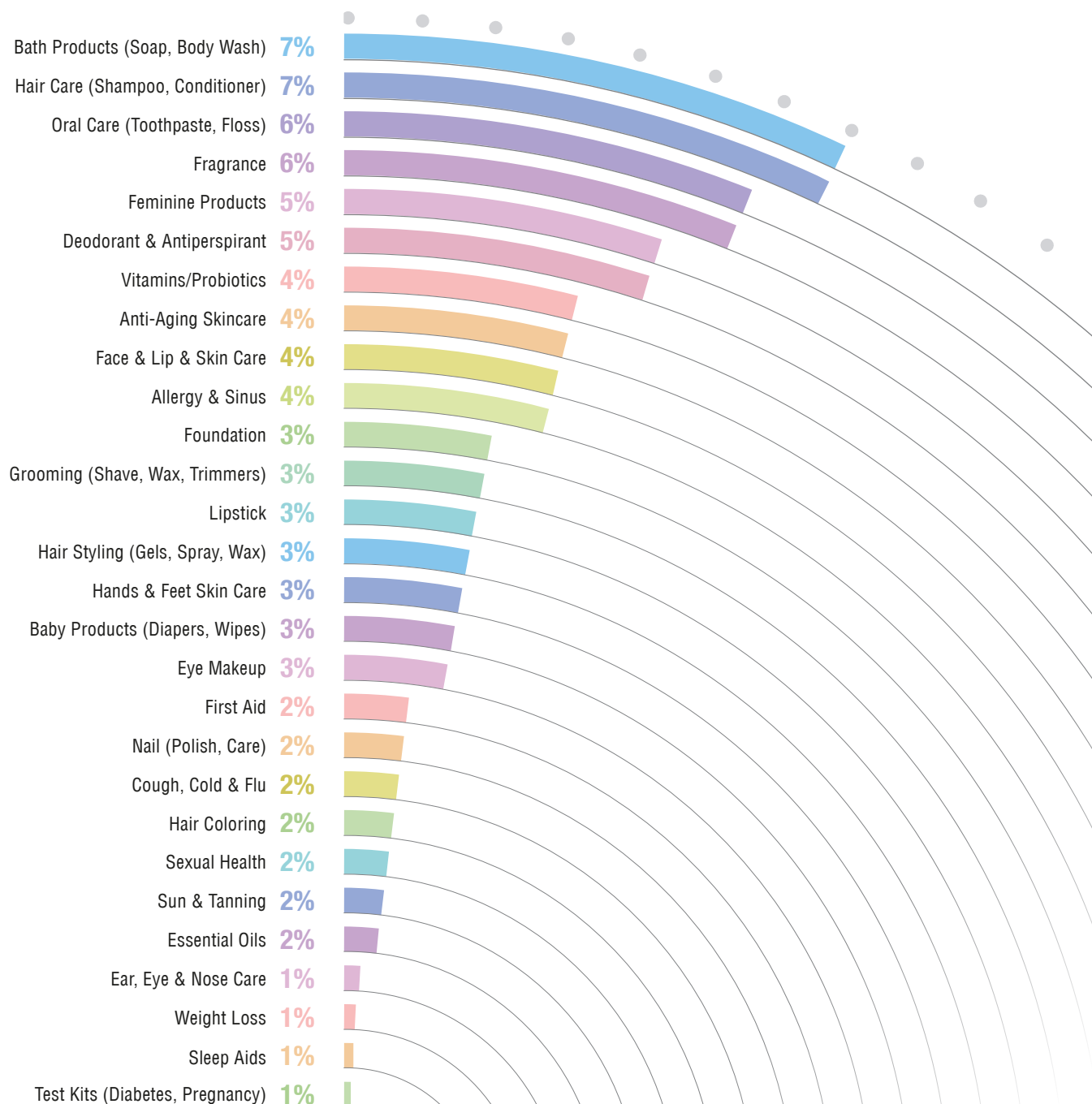


WHAT AND WHY SHOPPERS BUY ONLINE?

Fragrances jump up the list to fourth for online purchases. This could be surprising, since one would think shoppers would want to smell the product before buying! We'll see the result of these purchase decisions when we get to product return rates later in the study.

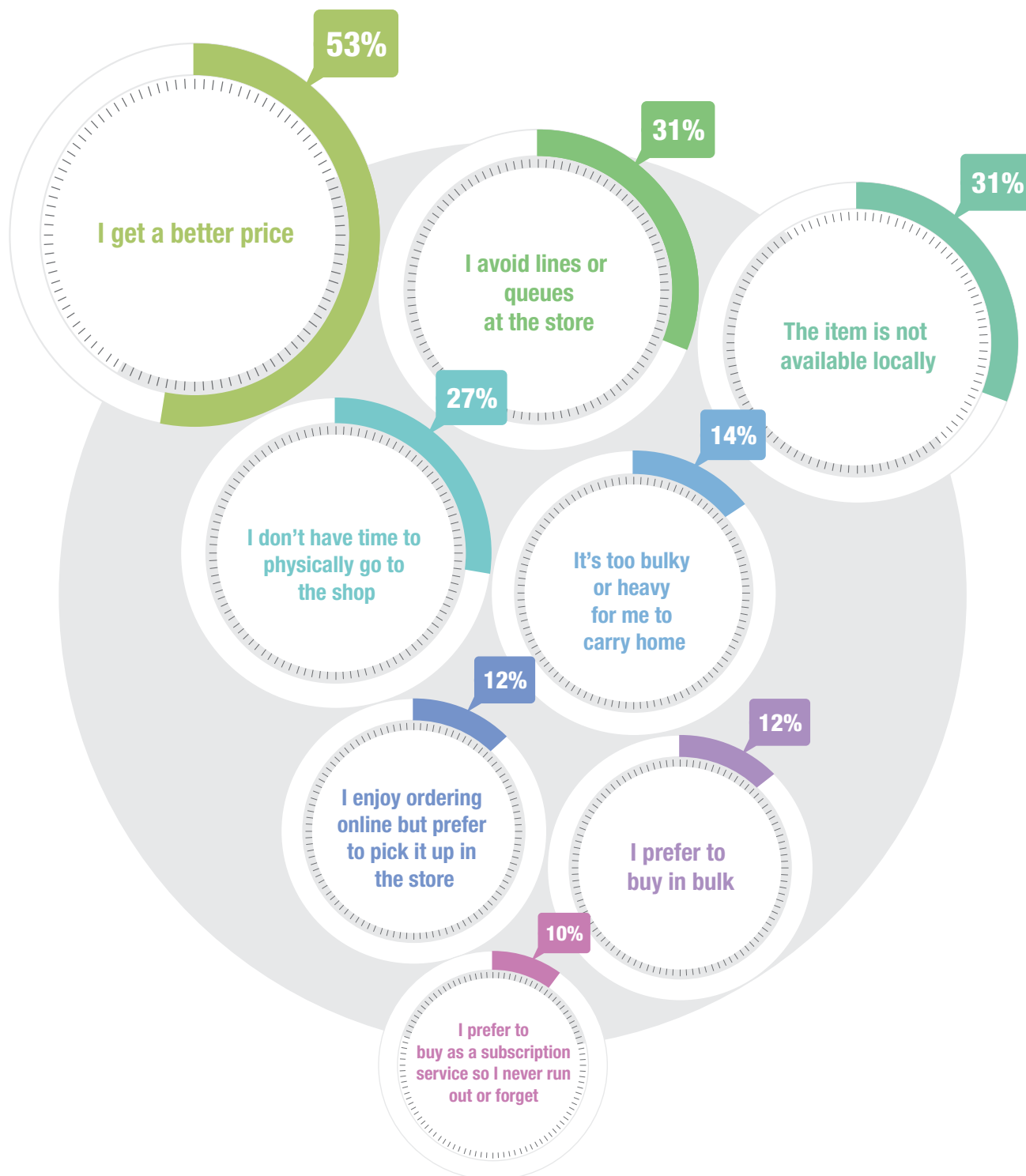
But shoppers are mainly buying online for price and convenience reasons, anyway. (See next page.)

Over the last three months, which of the following items have you purchased online?



WHAT AND WHY SHOPPERS BUY ONLINE?

What are your top reasons for purchasing health, beauty or personal care products online?



SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

The health, beauty and personal care brands shoppers are most loyal to.

“
Lipstick from Lancôme; the **sparkly package** made it look fun, also had an unusual way of opening product.”

“
Lamaur hairspray. I can't ever remember the product name but because of its **cow spotted packaging** I am always able to convey to the salespeople what I am looking for and they always laugh.”

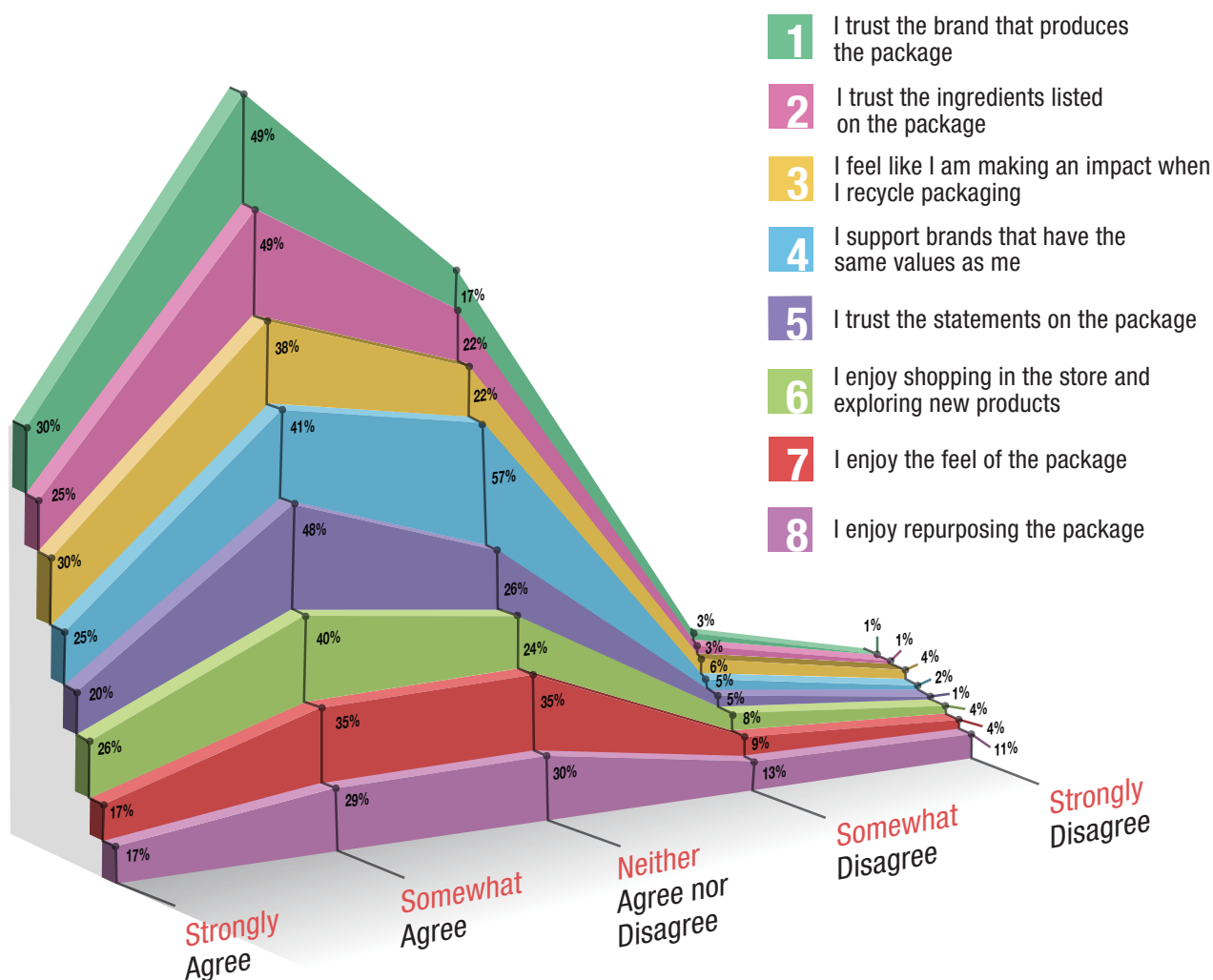


“
I bought a MAC bronzer and the packaging was **floral and fun.**”

SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

For these categories of products, shoppers agree that they trust the brand at a slightly higher rate than they agree that they trust the ingredients on the package.

Thinking of health, beauty or personal care products, which of the following statements do you agree with?



- 1 I trust the brand that produces the package
- 2 I trust the ingredients listed on the package
- 3 I feel like I am making an impact when I recycle packaging
- 4 I support brands that have the same values as me
- 5 I trust the statements on the package
- 6 I enjoy shopping in the store and exploring new products
- 7 I enjoy the feel of the package
- 8 I enjoy repurposing the package

“It’s the color and design that makes it attractive and fun. It’s the quality and strength of the packaging that makes it reusable.”

Shoppers here reveal **important differences** in their attitudes toward sustainability practices. While **68%** of shoppers agree that they feel they are making an impact when they recycle packaging, only **46%** enjoy repurposing the package. Even though slightly more people don’t enjoy reusing packaging, there are many who do, and some of their words express how much they appreciate high-quality packaging materials.

SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

Shoppers are not looking to extremes, such as getting a thrill or standing out or succeeding in life, when using their favorite health, beauty and personal care brands. Instead, they most frequently report experiencing a **sense of confidence**, which **28%** expressly report having when using their favorite brands.

When I use a product from my favorite health, beauty or personal care brands I....



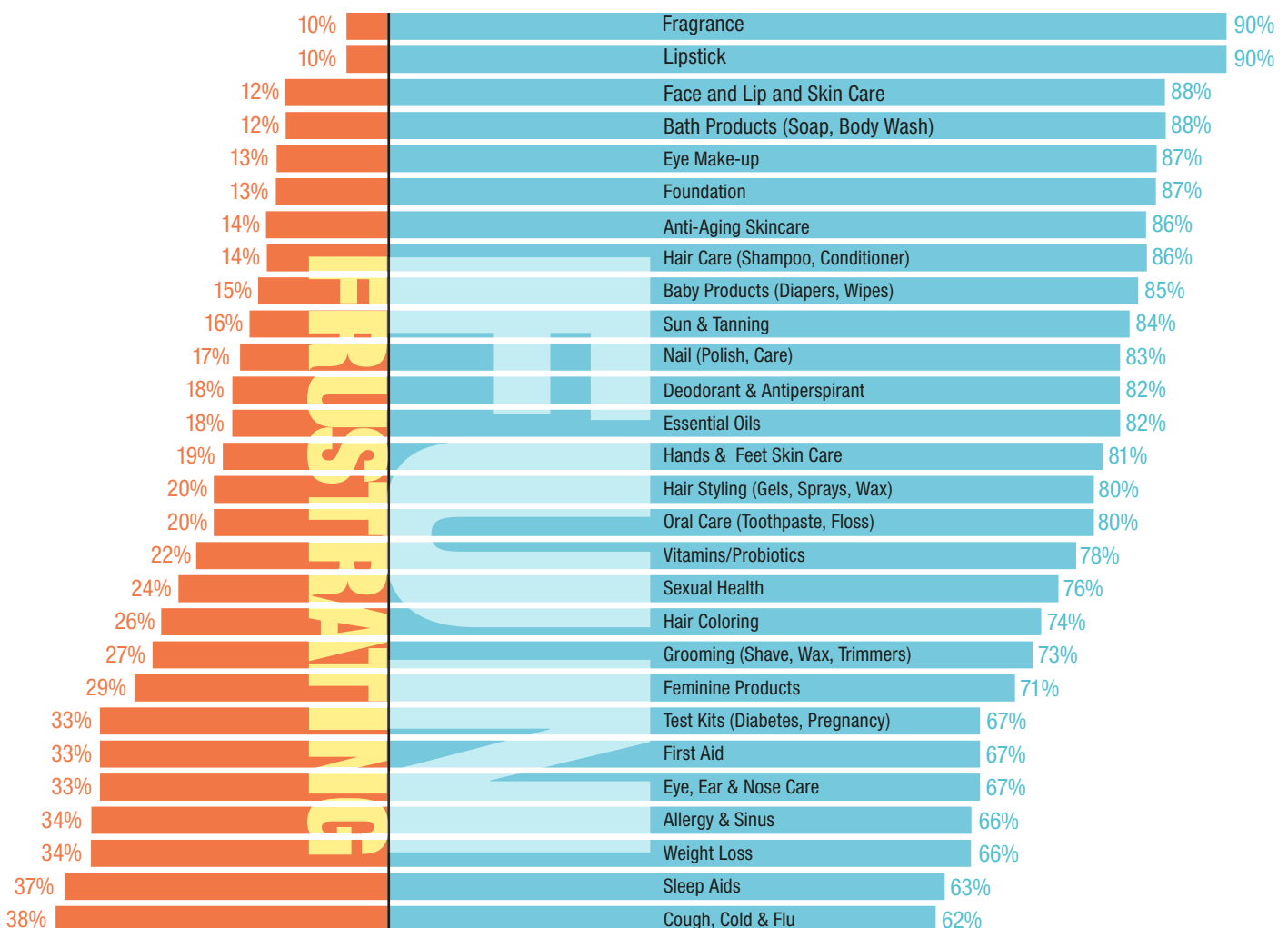
SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

It's rather easy to see that the items that shoppers consider to have the most fun and engaging packaging are those typically purchased with disposable income: fragrance, lipstick, skin care and makeup. These are things people don't have to buy, so the packaging works harder to get shoppers' attention and motivate purchase. Many high-end beauty brands use packaging to differentiate from competition.

Beauty packaging in particular caters to an audience that reviews products, applicators, packaging and colors, in an engaging way that can highlight the fun factor.

The items most often marked as having frustrating packaging are over-the-counter drugs and health treatments such as cough & cold, sleep aids, weight loss, allergy & sinus, ear & nose, first aid and test kits. There is an opportunity here to heighten the **product packaging experience** for these items people feel they need to buy to relieve their pain and their health concerns.

Which items have packaging that are fun and engaging and which types of product packaging frustrate you?



SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

WHAT DO SHOPPERS LIKE?



WHAT DO SHOPPERS DISLIKE?



“

I bought a powder cold remedy and the packaging was a slim rectangular paper-like sachet. It was **easy to store** and to get the product from the packaging.

”

“

If the packaging is cluttered, disorganized, dull, boring, not memorable it just blends in and is the **exact same as everything else** on the shelf.

”

“

In general, there's **too many words** on the labels that seem to blur together.

”

SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

Shampoo was frequently mentioned in the write-in comments regarding fun & engaging packaging. Here are some examples of shampoo packaging that shoppers thought were fun and engaging.

SELECT RESPONDENT COMMENTS

My cousin got to play with his shampoo bottle it has a built-in toy.

I liked the **color** of the bottle of shampoo and conditioner.

The shampoo product could be stood up either direction.

A Dove Men+ care shampoo packaging was **fun** and engaging. It had a **sophisticated** design. It had a unique shape. It had fun graphics. It had **bold colors**. It had **sustainable** packaging. It had a lot of relevant information on it. It had a **unique** way to open and close the packaging.

Shampoo was in a nice looking bottle and **easy to use**.

I love shampoo or/and rinse that has the pump on top.

SHOPPER PREFERENCES TOWARDS BRANDS AND PACKAGING

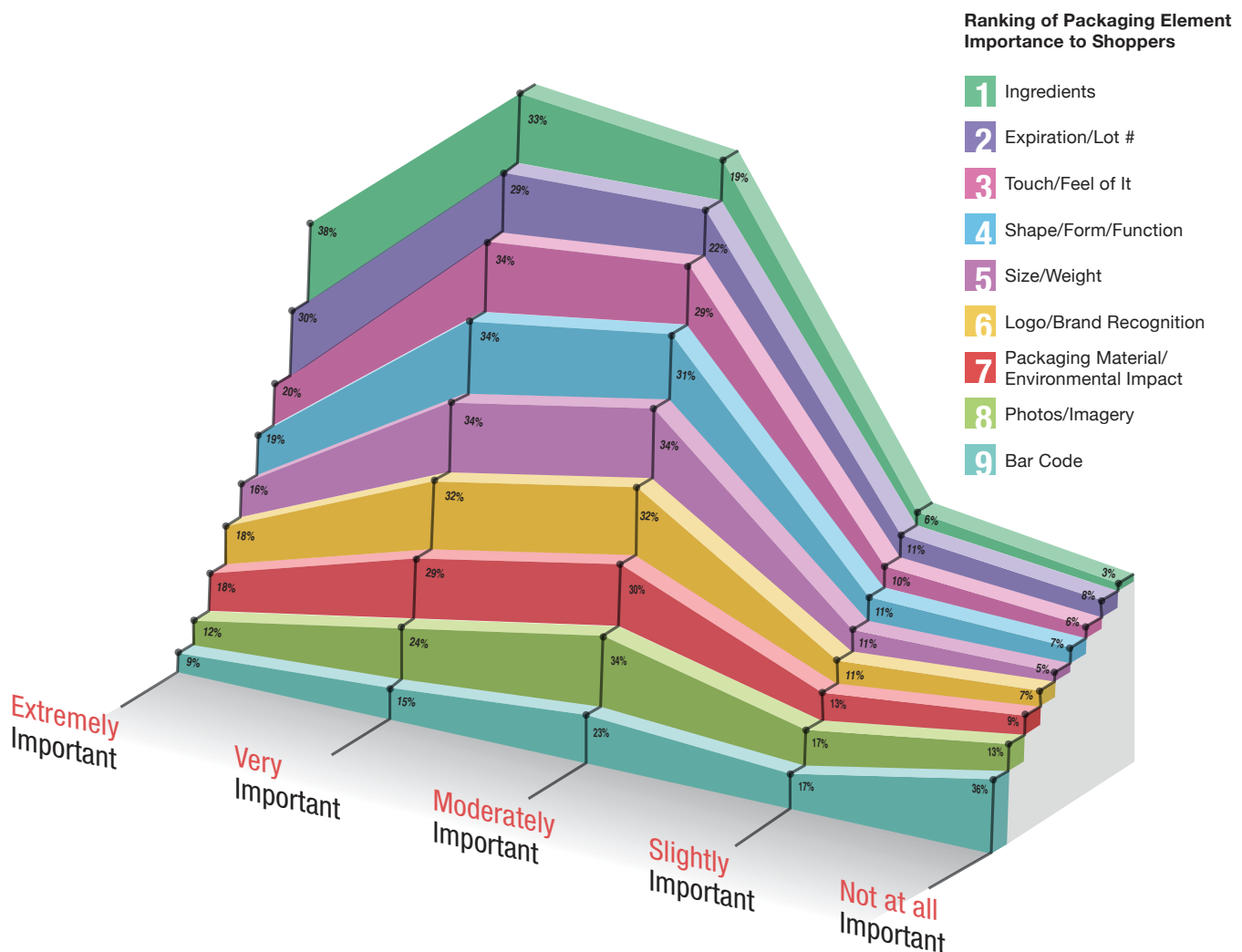
Shoppers look to the **ingredients** as the most important information on health, beauty and personal care packaging. It seems that because these items are being applied to the body or going inside the body, **the ingredients are the way the shopper perceives efficacy**. The ingredients provide the benefit and thus the value for the shopper.

Ranking fourth was **Shape/Form/Function**, a real opportunity for health, beauty and personal care brands because the use cases are so specific to environments. Shampoo was frequently mentioned in the comments.

Shoppers prioritized elements like ingredients, expiration and touch/feel above logo/brand recognition. However, marketers should not worry, because shoppers also have positive thoughts and brand loyalty towards specific products. This is demonstrated in our word cloud on page 10, where one can see adjectives that can be associated with the brand, logo, package and product.

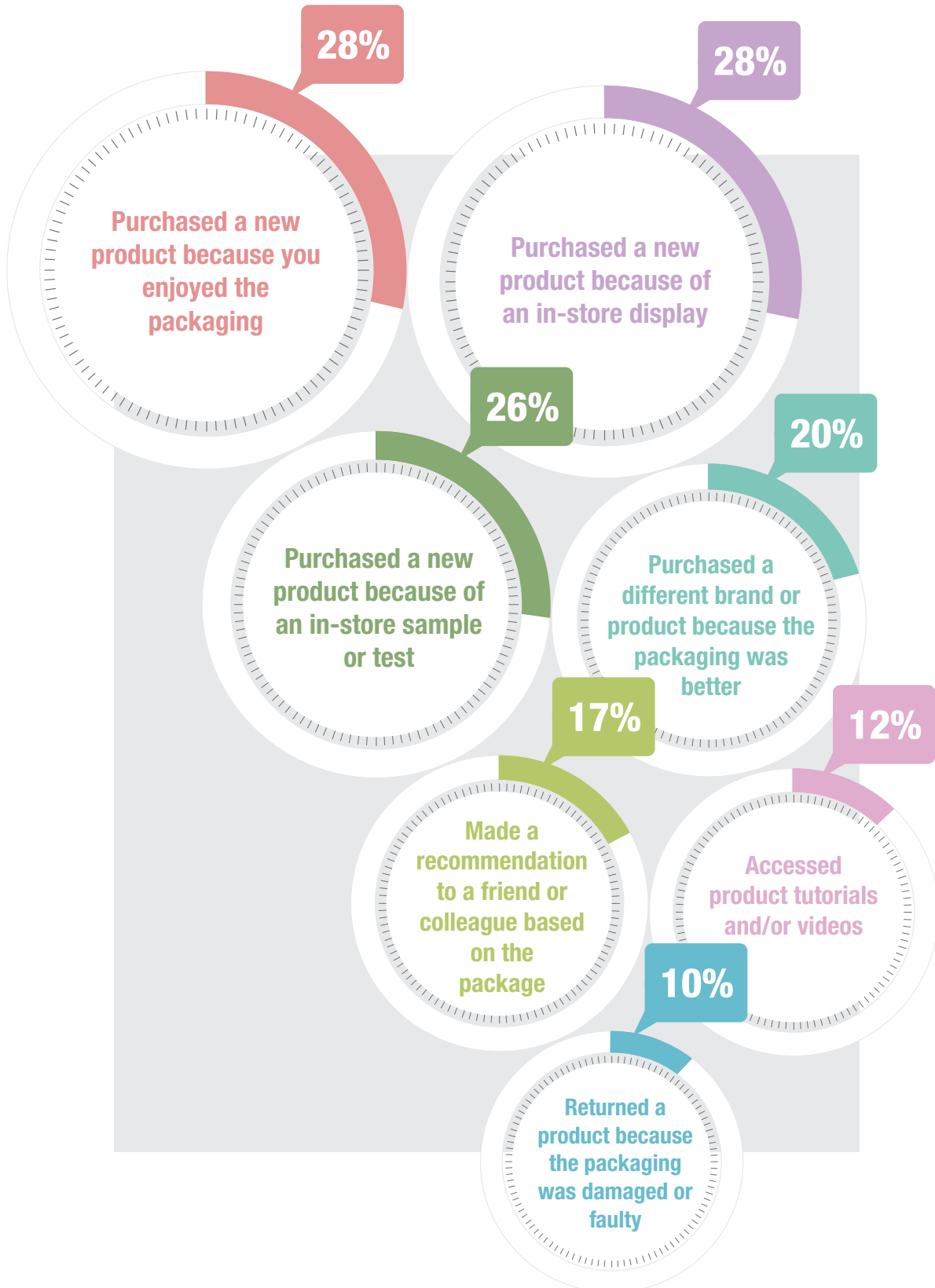
It's no surprise here that the bar code, which is primarily for the supply chain and retailer benefit, is the least important information on the package, from the shopper's perspective.

When evaluating or searching for healthy, beauty or personal care products, how important are the following on the package?



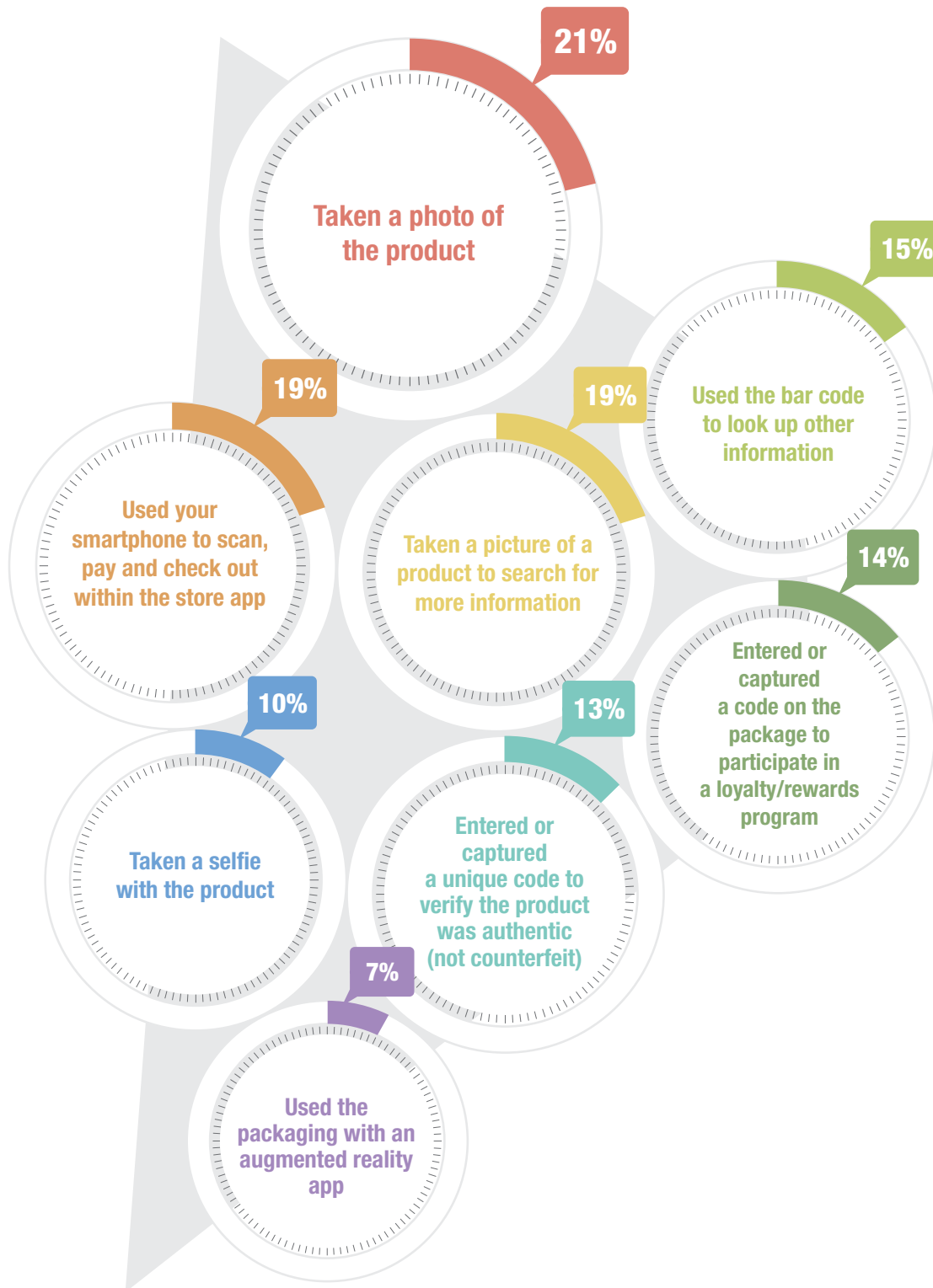
DIGITAL & PHYSICAL SHOPPING BEHAVIORS

Over the last three months, which of the following have you done during your in-store shopping experience?



DIGITAL & PHYSICAL SHOPPING BEHAVIORS

Over the last three months, which of the following have you done using your smartphone along with the health, beauty and personal care packaging?

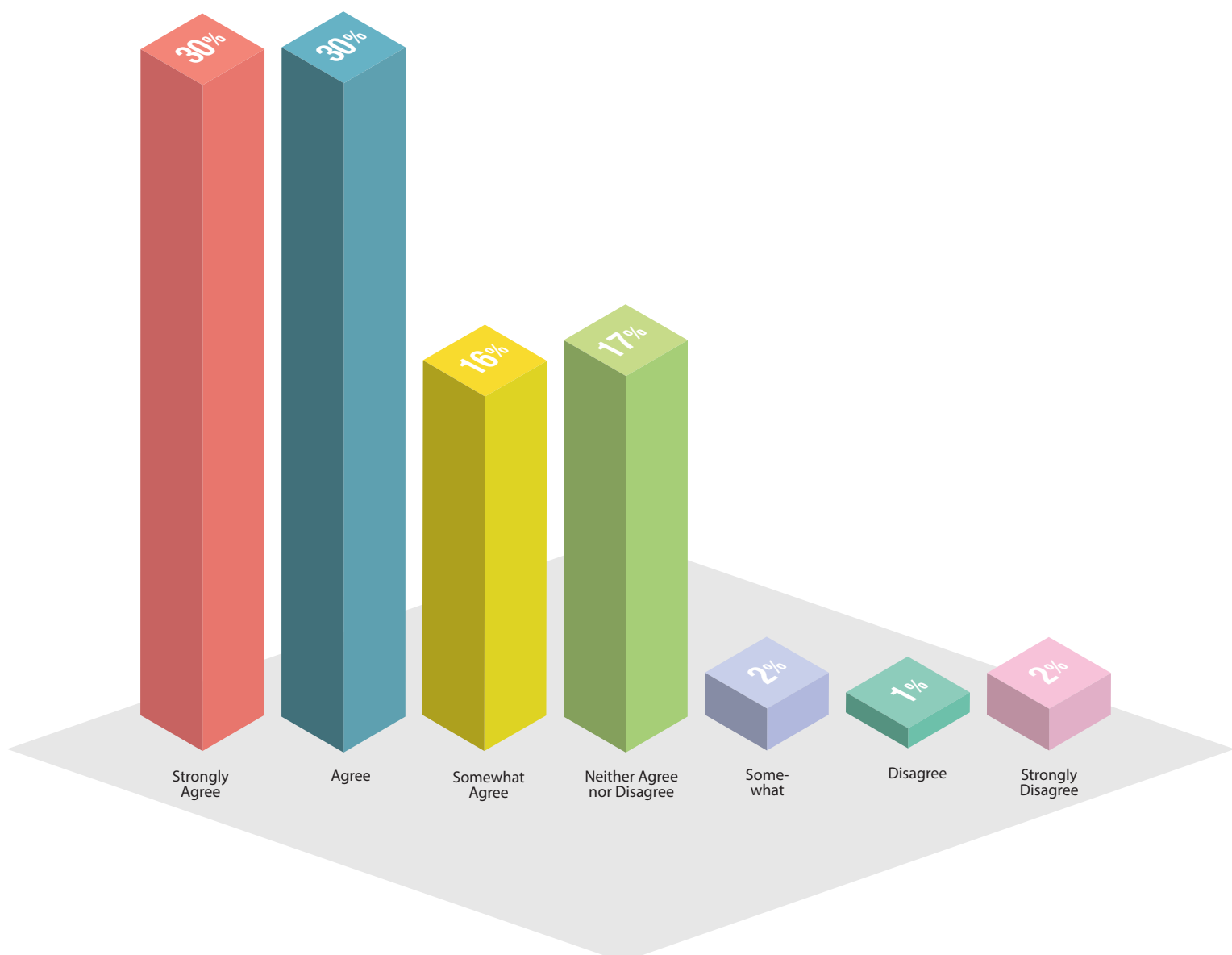


HOW IMPORTANT IS CONSISTENCY TO SHOPPERS?

Shoppers have an expectation that the product is the product, no matter **where they purchase** it or see it. This assumption of **inherent consistency** shows how they personify brands, thinking they are like individual people, not reflecting the fact that a brand is the combined essence and identity of millions of individual products and advertising impressions. **Omnichannel synchronicity** is of the utmost importance and a big challenge for marketers to manage.

Their expectations of packaging mirror this shopper naiveté about brand consistency. They expect imagery online and packaging in-store and products that arrive at their doors to all **appear exactly the same** (or at least very similar). They have no regard for the complexities of manufacturing and fulfillment supply chains.

I expect the health, beauty and personal care products I purchase in-store to have the same packaging as those I buy online.

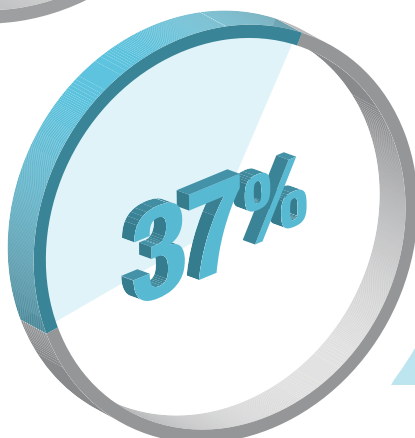


HOW IMPORTANT IS CONSISTENCY TO SHOPPERS?

How important is it that the images of these products you purchased online look the same when the product arrives at your front door as it did as online?



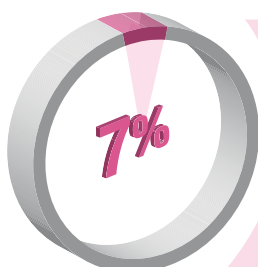
I expect the image of the product I buy online to be exactly the same as what is delivered. If it is not, I assume something is wrong with the product.



I am all right with small variations but would prefer the product look as similar as possible as the image I saw online.



I really don't care—all I care about is what is on the inside of packaging.



I expect the packaging to be similar but I understand that colors, designs or pictures can sometimes look different online than in real life.

WHAT ARE THE RESULTS OF AN **INCONSISTENT** EXPERIENCE?

One-third of shoppers surveyed reported that they had returned, exchanged or asked for a refund for a health, beauty or personal care product they had bought online due to the packaging specifically. The type of product most online shoppers reported to return was **Fragrance**.

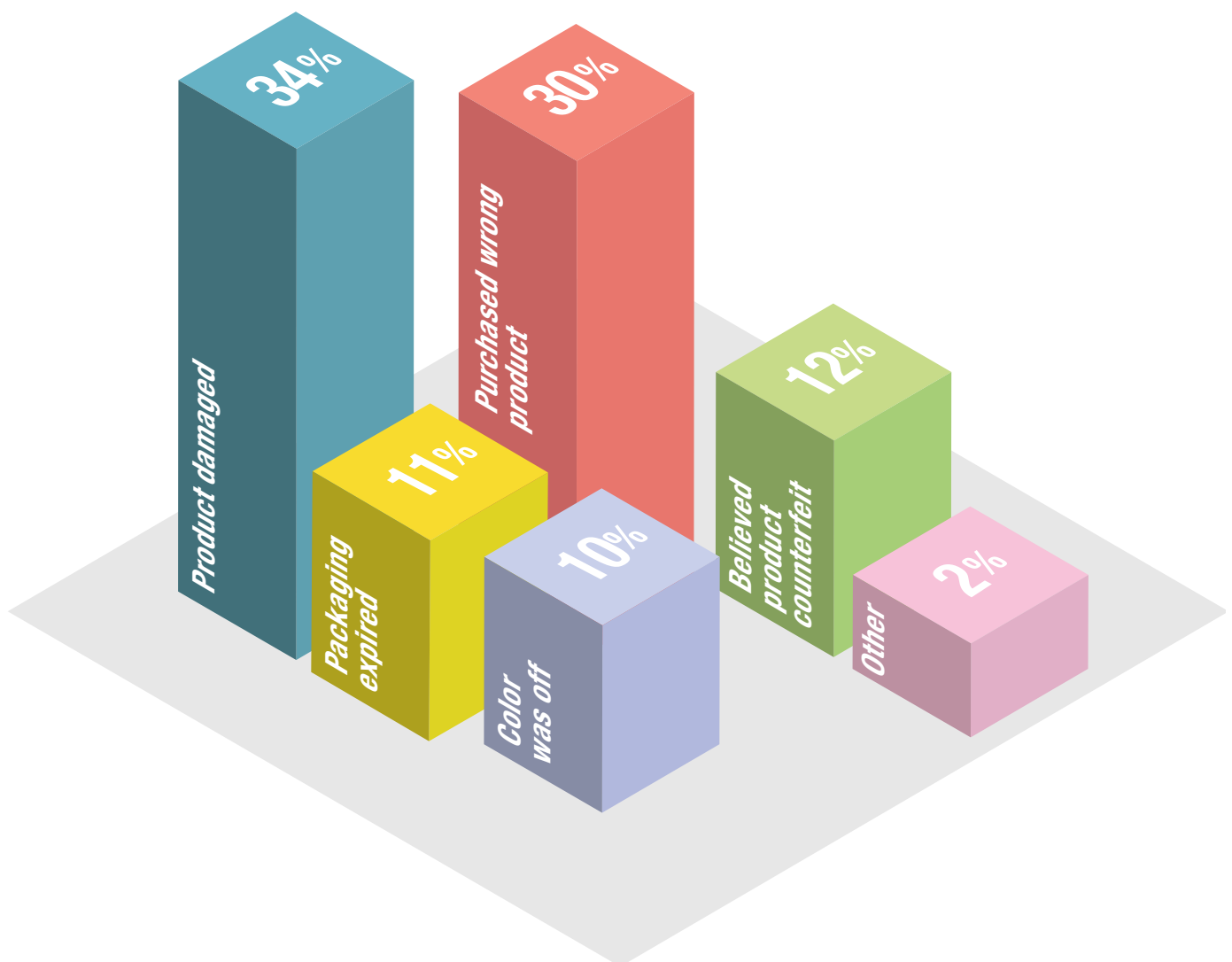
Have you ever returned, exchanged or asked for a refund for any of the following health, beauty or personal care products you purchased online because of the packaging?

	TOTAL	5+ TIMES	3-4 TIMES	1-2 TIMES
Fragrance	71	5	17	49
Feminine Products	58	8	17	33
Anti-Aging Skincare	57	5	20	32
Bath Products (Soap, Body Wash)	52	2	12	38
Allergy & Sinus	51	3	19	29
Hair Care (Shampoo, Conditioner)	45	5	12	28
Baby Products (Diapers, Baby Wipes)	44	6	10	28
Foundation	39	5	9	25
Lipstick	38	6	4	28
First Aid	33	4	15	14
Deodorant & Antiperspirant	33	3	8	22
Nail (Polish, Care)	31	4	12	15
Oral Care (Toothpaste, Mouthwash, Floss)	29	3	3	23
Face, Lip & Skin Care	28	3	9	16
Vitamins/Probiotics	28	1	7	20
Grooming (Shave, Wax, Trimmers)	27	3	8	16
Hair Styling (Gels, Spray, Wax)	26	7	5	14
Eye Makeup	23	4	5	14
Hands & Feet Skin Care	23	2	7	14
Hair Coloring	21	5	3	13
Sexual Health	21	2	5	14
Cough, Cold & Flu	18	1	7	10
Sun & Tanning	11	1	3	7
Ear, Eye & Nose Care	11	0	6	5
Weight Loss	7	1	1	5
Essential Oils	6	0	2	4
Test Kits (Diabetes, Pregnancy)	3	0	0	3
Sleep Aids	2	0	1	1

WHAT ARE THE RESULTS OF AN **INCONSISTENT** EXPERIENCE?

One third of shoppers agreed that they had returned products they had purchased online due to the packaging. Most of the returns for online purchases of health, beauty & personal care products were because the product package was damaged (**34%**). Shoppers are having difficulty with order accuracy, as **31%** of those who returned because of the packaging did so because they realized they purchased the wrong product. Similarly, shoppers return when the product quality or authenticity seems questionable. **Ten percent** of those who returned online purchases due to packaging cited the product package color was 'off' as the reason, and **12%** believed the product was a counterfeit or fake.

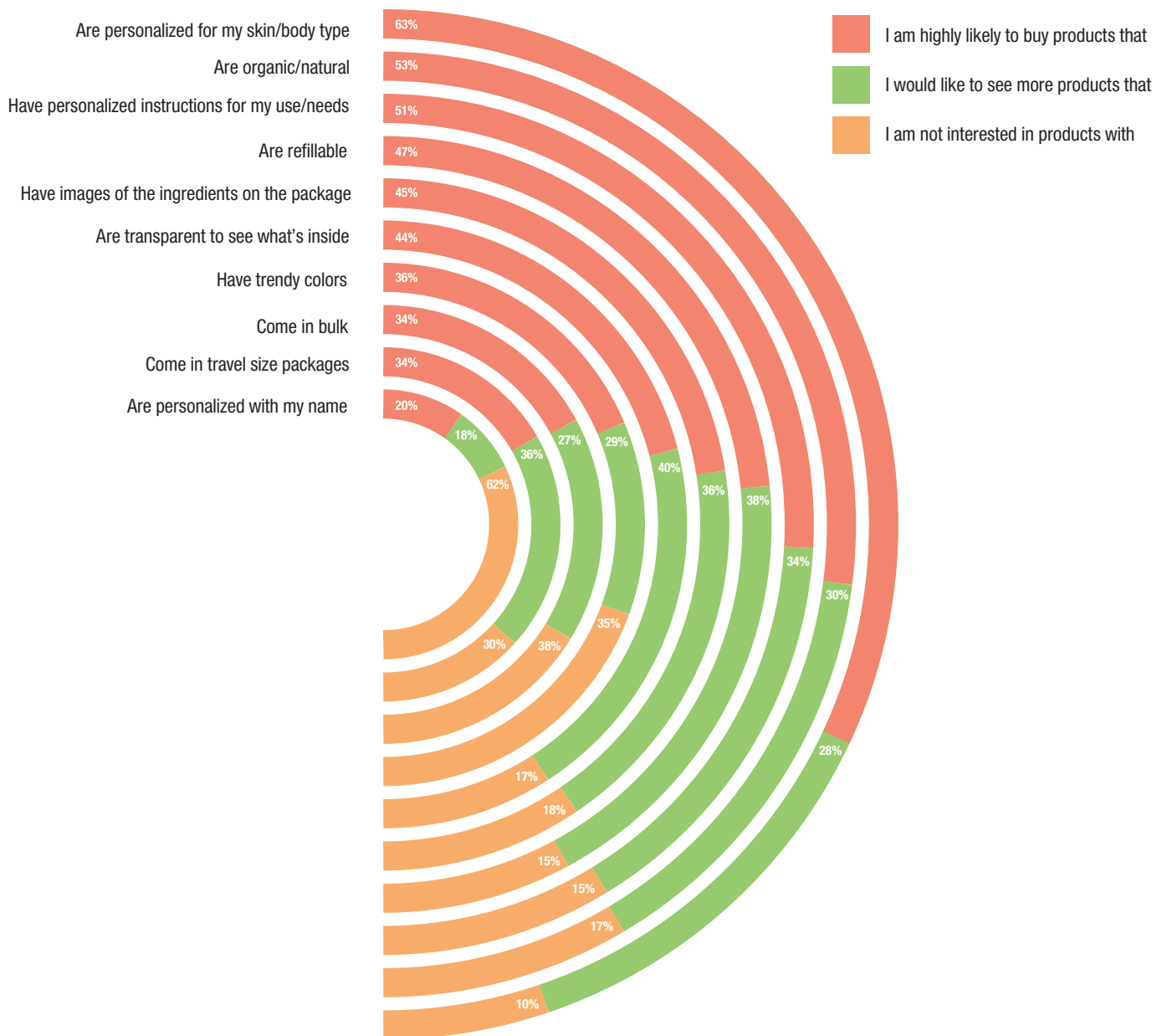
Reasons for returning online purchases due to packaging.



WHAT DO SHOPPERS VALUE MOST FOR THE FUTURE?

We asked shoppers to reflect on what they would like to see from health, beauty and personal care products. Their responses to **personalization** are very interesting, indicating they are highly likely to buy products that are personalized for their skin/body type (**63%**) and also that they are interested in products with personalized instructions for their own needs or use case (**51%**). This definition of effective, valuable personalization is contrasted with the **62%** of shoppers saying they are not interested in products “personalized with my name”.

Product attributes of the future.



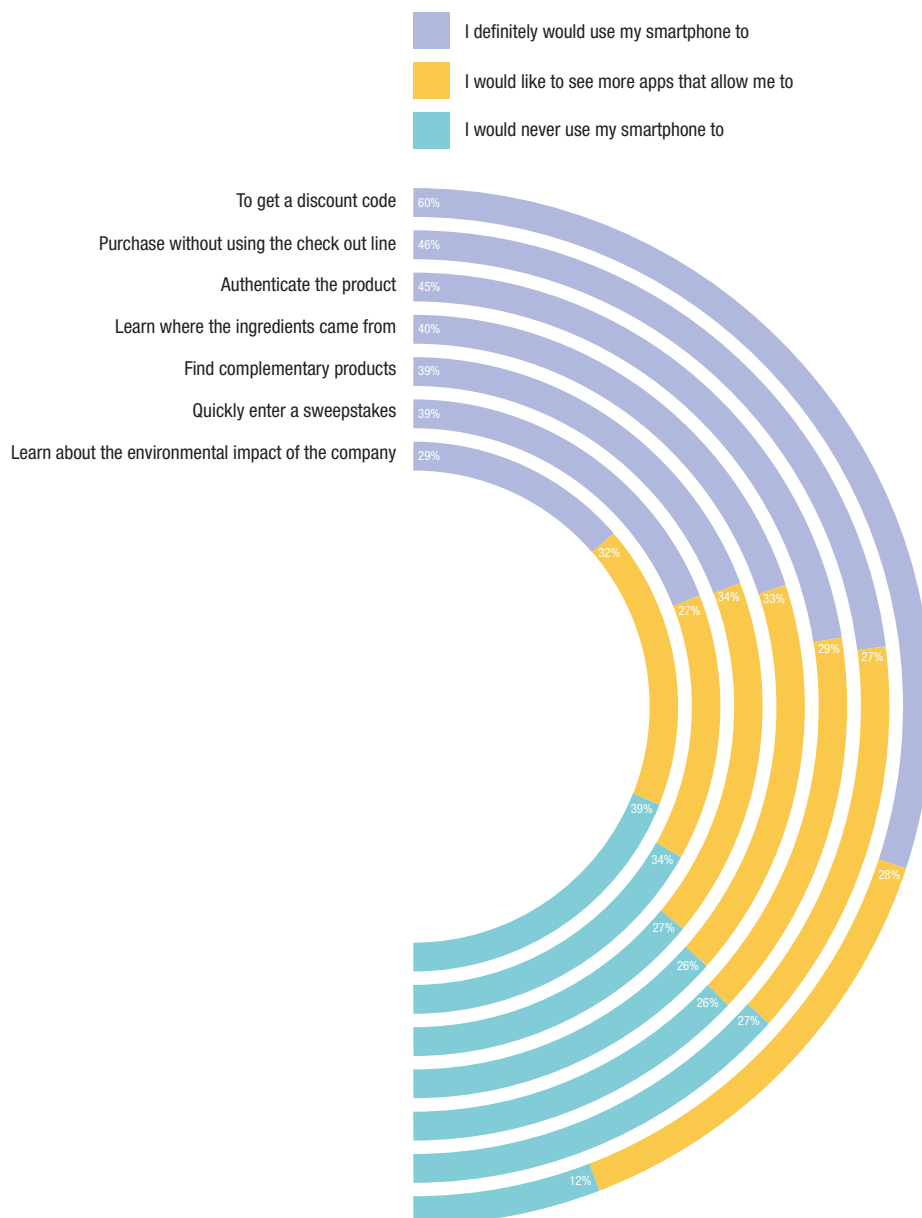
WHAT DO SHOPPERS VALUE MOST FOR THE FUTURE?

Shoppers also say they definitely would use their smartphones to get a discount code (**60%**), the most popular of the choices we surveyed.

Shoppers expect to increasingly authenticate the products they buy via digital means. Forty-five percent of shoppers would definitely use their smartphones to authenticate health, beauty and personal care products and **40%** would like to learn where the ingredients came from with their smartphones. Shoppers may want to know that what they're buying is authentic, that it is in fact what they believe it to be and what it claims to be, that the product is new and unadulterated.

Convenience is also a strong desire when it comes to future smartphone use, as **46%** of shoppers would definitely use their smartphones to skip the checkout line for their purchase.

The future of smartphone use with product packaging.



CONCLUSION

Today's shoppers consider a multitude of benefits they will receive from the health, beauty and personal care products they buy, from **emotional benefits** to **personal efficacy**. They require products from their favorite brands to help them lay a foundation of **security** and **well-being** so they can feel the **confidence** they need to be the people they want to be.

Shoppers take into account the broader product story when they purchase, a story that starts with the place the **ingredients** were sourced and extends to the product packaging's **recyclable qualities** or ability to be repurposed. This amounts to more pressure on the product packaging to communicate these increased points of consideration, more opportunities for error in the packaging creation process and more opportunities for miscues from packaging that can lead to costly returns for brands.

Together, the Danaher Product Identification Platform's operating companies, X-Rite, Pantone, Esko, and AVT desire to continue to **reveal insights** about the digital shopper journey and the **changing expectations** of packaging to better equip brand marketers and other leaders in consumer goods companies with the data they need to develop **tighter strategies** for creating and executing packaging, thereby supporting the keystone of communication between brand and shopper: the product package.

METHODOLOGY

Survey respondents are those who are the **primary shopper** of health, beauty & personal care products or have shared responsibilities. A **random sampling** was drawn from a list of consumers until a minimum of **3,000 responses** were obtained via an online survey in the following settings. Sampling were shared across **North America, Western Europe** and **Asia**. North America's sampling was 1,000; 1,000, split equally between France, United Kingdom, Germany and Spain; Asia consisted of 500 in Japan and 500 in China.

Gender was split **52% Female** and **48% Male**.

Age followed US 2016 Census,

- **13%** ages 20-24
- **20%** ages 25-34
- **20%** ages 35-44
- **20%** ages 45-54
- **15%** ages 55-64
- **10%** ages 65+

If we categorized by generations,

- **15%** iGen/GenZ
- **20%** Millennials
- **20%** Xennials
- **20%** Gen X
- **15%** Boomers
- **10%** Boomers and Silent



ABOUT US

Pantone provides the universal language of color that enables color-critical decisions through every stage of the workflow for brands and manufacturers. More than 10 million designers and producers around the world rely on Pantone products and services to help define, communicate and control color from inspiration to realization – leveraging advanced X-Rite technology to achieve color consistency across various materials and finishes for graphics, fashion and product design. Pantone Standards feature digital and physical color specification and workflow tools. The Pantone Color Institute™ provides customized color standards, brand identity and product color consulting as well as trend forecasting inclusive of Pantone Color of the Year, Fashion Runway Color Trend Reports, color psychology and more. Pantone B2B Licensing incorporates the Pantone Color System into different products and services, enabling licensees to communicate and reproduce certified Pantone values and improve efficiencies for their users. Pantone Lifestyle brings color and design together across apparel, home, and accessories. Learn more at www.pantone.com.

X-Rite Incorporated is a global leader in the science and technology of color and appearance. With Pantone, X-Rite employs more than 800 people in 11 countries. The company's corporate headquarters are located in Grand Rapids, Mich., with regional headquarters in Europe and Asia and service centers across Europe, the Middle East, Asia, and the Americas. X-Rite offers a full range of solutions used by manufacturers, retailers, printers, photographers and graphic design houses to achieve precise management and communication of color and appearance throughout their processes. X-Rite products and services are recognized standards in the printing, packaging, photography, graphic design, video, automotive, paints, plastics, textiles and medical industries. For further information, please visit www.xrite.com.

Esko helps its customers to make the best packaging for billions of shoppers. Its software and hardware product portfolio supports and manages the packaging and print processes for brand owners, retailers, designers, pre-media and trade hops, packaging manufacturers and converters. For nine out of ten retail packages, Esko solutions are used in packaging management, asset management, artwork creation, structural design, prepress, 3D visualization, flexo plate making, workflow automation, quality assurance, sample-making, palletization, supply chain collaboration and/or the production of signage and displays. Enfocus, with its PDF quality control tools and automation solutions, MediaBeacon, with its digital asset management (DAM) solutions and BLUE Software, with its SaaS label and artwork management applications are all part of the Esko family. For further information, please visit www.esko.com.

AVT is the global leader in print process control, quality assurance and press control for the packaging label and commercial print industries. Backed by state-of-the-art technology and field-proven solutions, more than 7,000 AVT systems are installed at customer sites worldwide. AVT is headquartered in Hod-Hasharon, Israel, with sales marketing and support offices in the United States, Europe and China. For further information, please visit www.avt-inc.com.

Danaher is a global science and technology innovator committed to helping its customers solve complex challenges and improving quality of life around the world. As part of Danaher's Product Identification Platform, Esko, X-Rite, Pantone, AVT, Videojet provide tools that digitize, automate, and connect tasks, people and processes to simplify the packaging value chain. For further information, please visit www.danaher.com.

ABOUT US



DANIELLE SAUV 

Director, Customer Insights and Experience, Product Identification Platform, Danaher

Danielle Sauv  is a marketing technologist, writer and strategist for a collection of global companies owned by Danaher, including Pantone, MediaBeacon, Esko, X-Rite, AVT, Laetus and Videojet. Throughout her 16-year career, Danielle has held positions in many parts of the consumer packaging ecosystem: consumer goods manufacturer, promotional agency, brand strategy and package design firm, premedia firm and packaging management software start-up, giving her a uniquely broad perspective on simplifying the packaging value chain. Her packaging technology insights have been featured in The Dieline, FoodDive, MediaPost, Marketing Tech Outlook, Loyalty360, Packaging Strategies, Brand Packaging, Packaging Digest and Chief MarTec. Danielle earned her B.A. in English and Theater from Messiah College and now lives outside Chicago with her husband, four children, dog, fish, tortoise



SHOSHANA BURGETT

Director, Corporate Strategy and Customer Insights, X-Rite

Shoshana Burgett leads PANTONE[ ] and X-Rite's voice of the customer (VOC) initiative across several industries, including print, packaging, apparel, footwear, cosmetics and more. She is responsible for advancing customers' needs by incorporating their voices into the company's product, pricing, marketing, sales, and innovation strategies. Shoshana has 25 years' experience in the print and packaging industry, specializing in on-demand manufacturing and personalization. She regularly speaks at industry events and has been featured in HOW, WhichPLM, Quality Digest, Beauty Packaging, Packaging Digest, Printing Impressions and WhatTheyThink. She holds a Masters in Science in International Business and Personalization, and a B.A from School of Visual Arts and currently lives outside of Boston where she enjoys hiking, traveling and taking on new adventures.