

## CONSUMER RESEARCH STUDY

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# SURVEY OF ITALIAN CONSUMERS TO EVALUATE THE ITALIAN PROPOSAL OF ADDITIONAL NUTRITIONAL LABELING



## PRESENTATION OF MAIN RESULTS

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# Flow topics

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- 1 | Background, methodology and sample
- 2 | Perception relating to well-being, nutrition and nutritional values
- 3 | Evaluation of proposal for additional nutrition labelling FOP
- 4 | Evaluation of proposal for additional nutrition labelling FOP  
in the mini shelf of products
- 5 | Back up slide

# Background, methodology and sample

1

## Background, objectives and sample size of the survey

In order to evaluate the Italian proposal for additional nutrition labelling, IRI carried out a survey of a **representative sample** of **Italian consumers** men and women aged 18 to 75 years with 2 main objectives:

1. The interest, readability and understanding of the information elements of the label
2. The ability of the label to food education, in terms of change in purchase attitudes and consumptions.

*The consumer research was conducted with scientific criteria and high statistical robustness evoked in Article 35*

- **1,504 interviews** to represent and segment the **average consumer**; **statistically significant** sample (error margin of +/- 2.5% with 95% confidence interval for the total interviewed values)
- Representative sample of Italian consumers by gender, age, social class, geographical area and town size
- Survey was conducted using CAWI (Computer Assisted Web Interview) methodology

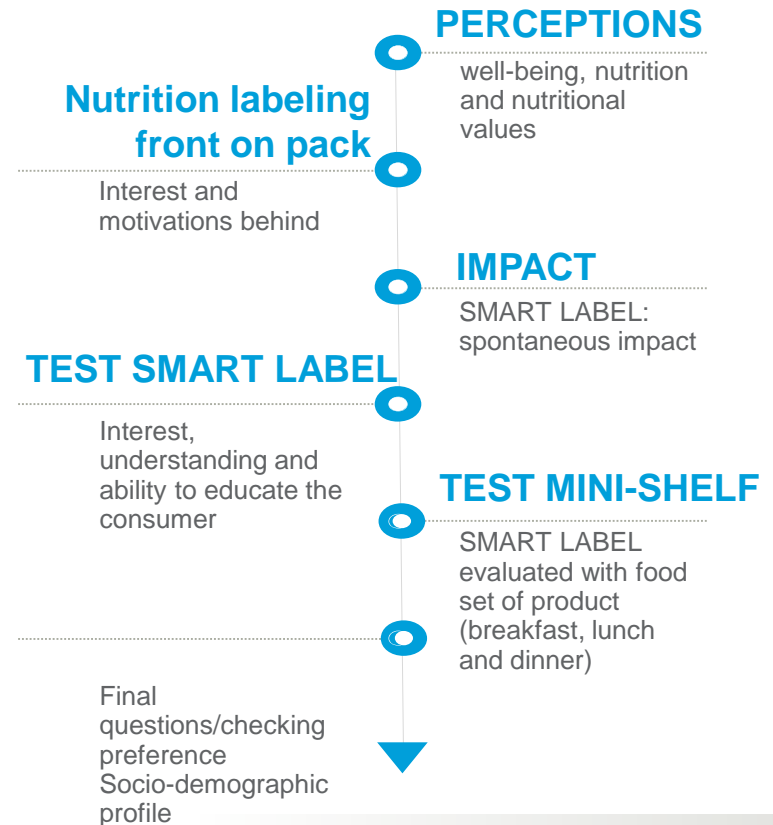
# The flow of the questionnaire

To the sample of 1504 consumers a questionnaire was submitted that included a series of pre-coded questions (to evaluate their perceptions and opinions using a Likert scale or with dichotomous answers) and an open-ended, spontaneous question regarding the elements of understanding and impact of the Italian proposal for additional nutrition labelling

Here is the information flow carried out in the questionnaire.



Questionnaire flow



# Perception relating to well-being, nutrition and nutritional values

# 2

# What is the awareness and consciousness of Italian consumers regarding the nutritional values of foods?

For nutritional values we mean: eg. total calories, fats, saturated fats, sugar and salt content



**72% of Italian consumers are very careful about the nutritional values of the foods they consume**



**75%**

**Women pay more attention to nutritional value**



**Adult (45 yo +) and senior** higher than average **75%**

**Gap on Young Millennials** (18-24 anni) **59%** at **66%**



**Social class Upper/medium upper** above average **76%**

**Small Gap on social class Medium low/low** at **70%**



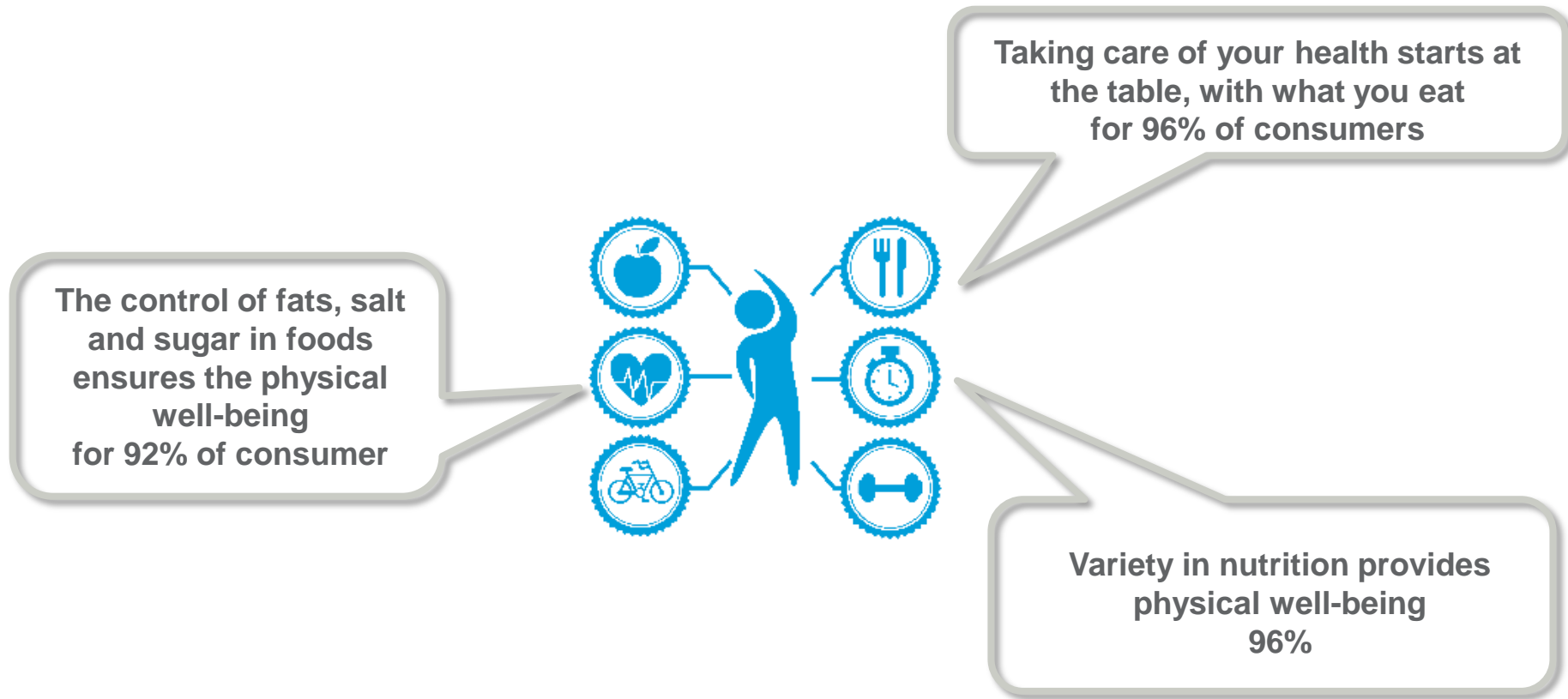
Q7) In relation to your attitudes and habits towards food, indicate to what extent the following statements fit you ...  
Top box: % of strongly agree + quite agree



\*\* Statistically significant difference at 95% compared to the total population

# Why?

## Wellness and health are strongly linked to nutrition



Q7) In relation to your attitudes and habits towards food, indicate to what extent the following statements fit you ...  
Top box:% of strongly agree + quite agree



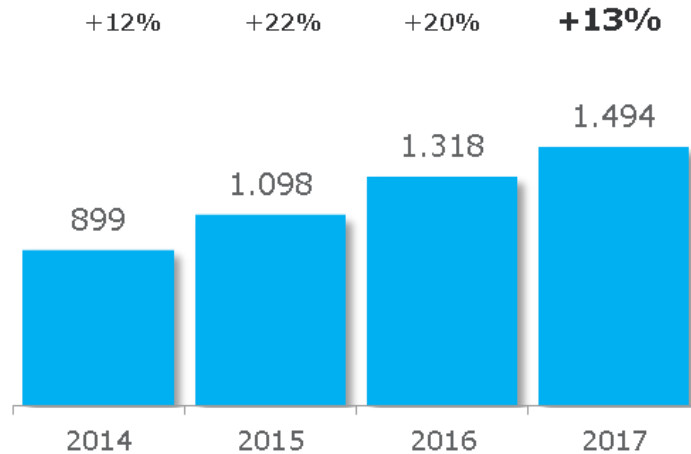
# The growth of sales of organic food products is a sign that confirms the evolution of the consumer

IRI Insight contribution

## Sell out of organic food products detected by IRI Retail Tracking

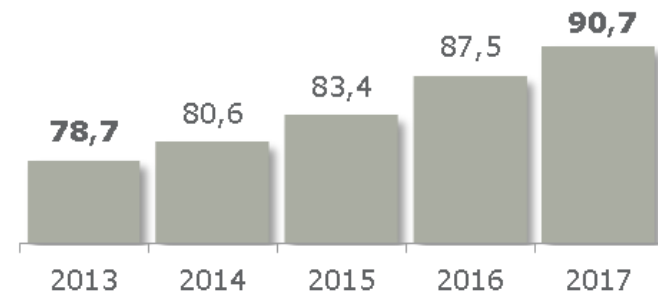


MIO €



## 90% of Italian households have consumed an organic product at least once in 2017

### % Absolute penetration in Household



Spource: IRI Retail Tracking Italian sell out . Hypermarket, Supermarket, Traditional pos

## Summary for perception relating to well-being, nutrition and nutritional values

- **Consumers are evolving:** majority of Italian consumers are aware that paying attention to the control of fats, salt and sugar helps wellbeing
- Consumers **actively search for information on nutritional values:** **87%** of consumers looked for, at least once, information about the nutritional values of foods.
- Notably, consumers **look for understanding** the fat content, the sugar content, the total calories.
- Almost all consumers **read the label** of the products, mainly at the time of purchase
- **80% of consumers** is generally interested in the **nutritional label** on the **front of packaging**, a **33%** of whom is very interested
- **Why?** Consumer seeks **knowledge, information** in order to be able to **decide independently** on purchases of different food products

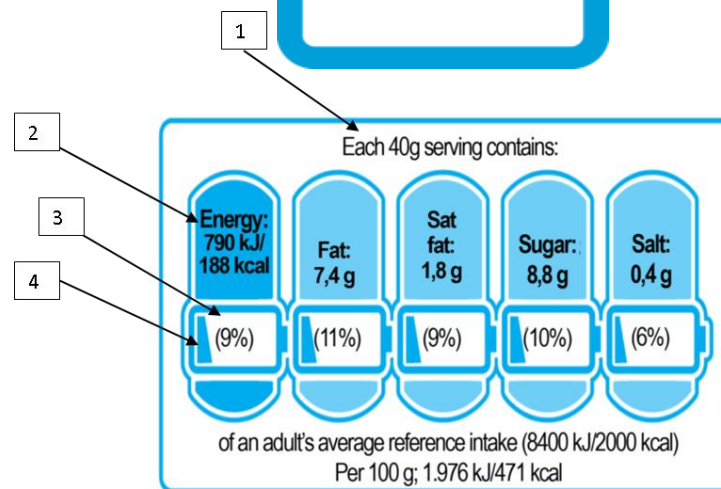
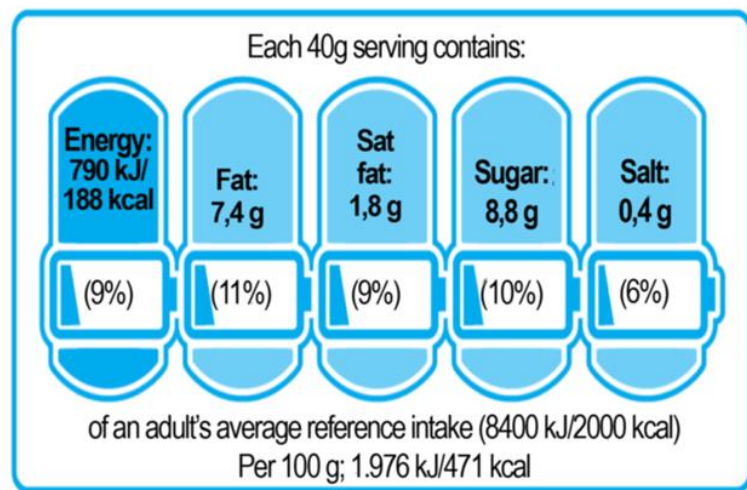
# Evaluation of Italian proposal for additional nutrition labelling FOP



# Procedure of the evaluation of Italian proposal for additional nutrition labelling FOP



Number of respondents  
1504 Italian consumers



1- All data refer to a single serving.

2- Each box indicates the energy, fats, saturated fats, sugars and salt content of each serving; the energy content being expressed both in Joule and in Calories; the content of fats, saturated fats, sugars and salt being expressed in grams.

3- Inside the "battery" symbol it is indicated the percentage of energy, fats, saturated fats, sugars and salt contained in a single serving of the recommended daily intake. The recommended daily intake amounts for an average adult are:

Energy: 8400 kJ/ 2000 kcal

Fats: 70 g

Saturated fats: 20 g

Sugars: 90 g

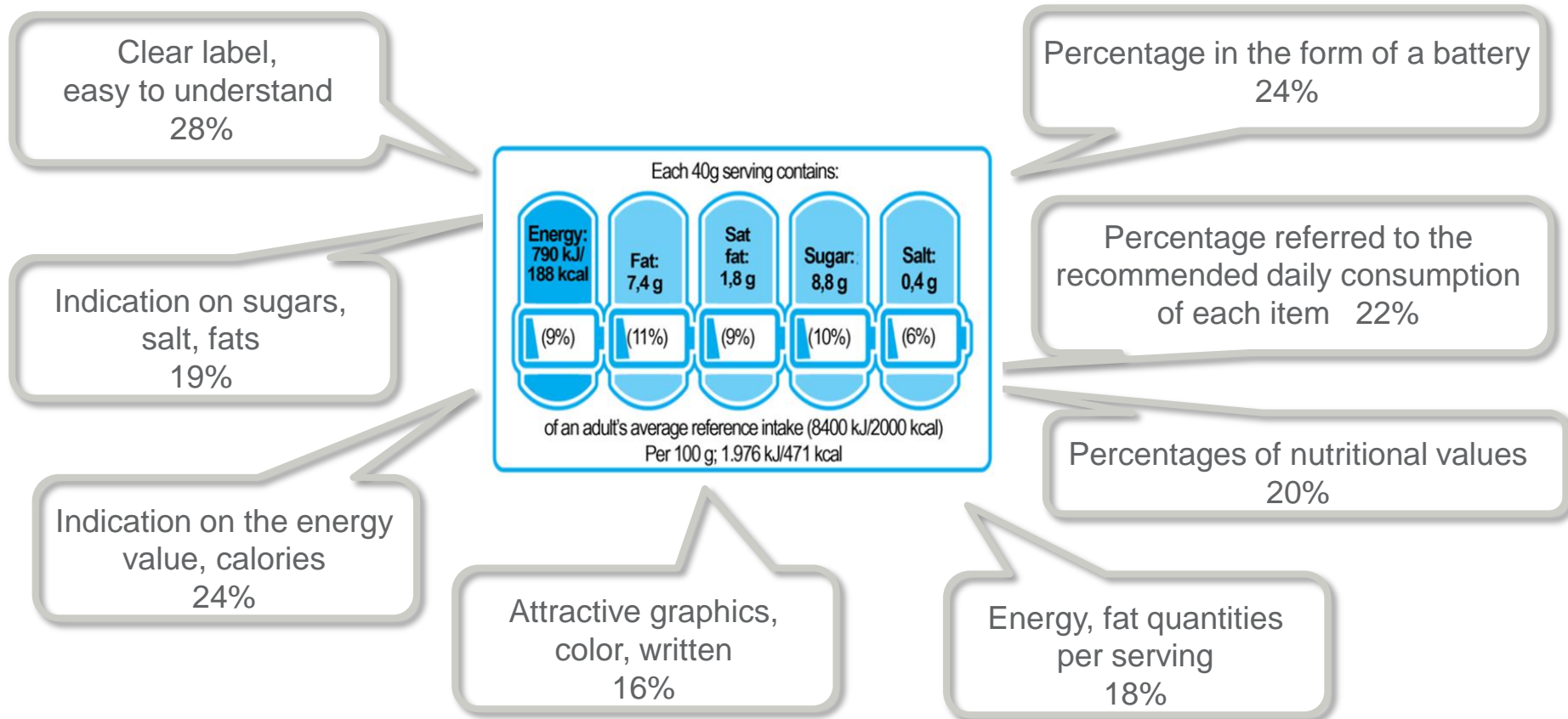
Salt: 6 g

4- The charged part of the battery represents graphically the percentage of energy or nutrients contained in the single serving, allowing to quantify it also visually. For a balanced daily diet the sum of what they eat during the day should not exceed 100% of the recommended daily intake amount.

# 87% of consumers spontaneously mentioned one or more positive reasons for the proposal

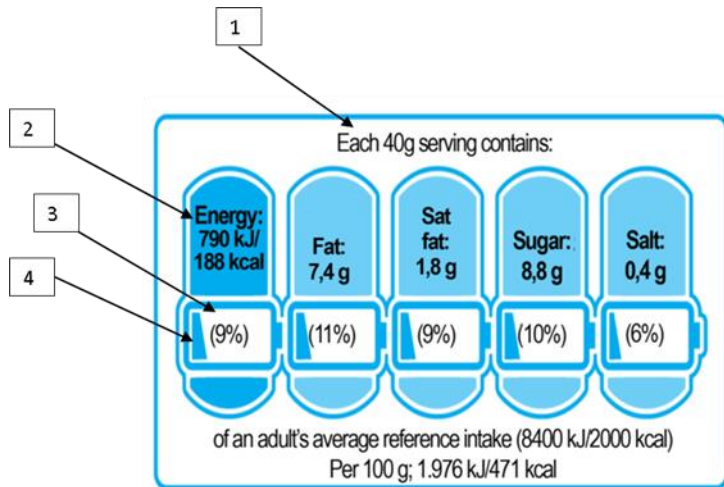


Spontaneously, 87% of consumers, following the view only of the label, mentioned a plurality of reasons of equal importance that highlight the positive impact.



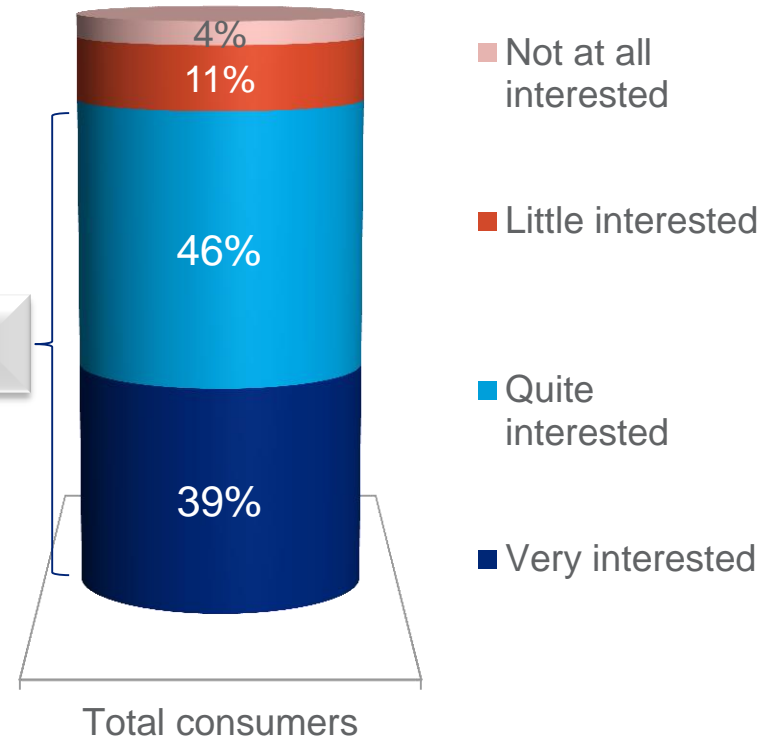
Q18) Spontaneously, in your opinion, what are the elements of this new label that most attracts your attention?  
If you were to describe to a friend of yours what you understood by seeing this new label, what would you say?

# 85% of Italian consumers are interested in the new nutrition labelling FOP compared to the labels currently present on the pack



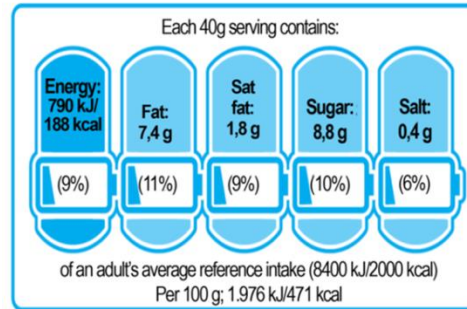
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Energy: 8400 kJ/ 2000 kcal  
Fats: 70 g  
Saturated fats: 20 g  
Sugars: 90 g  
Salt: 6 g
- 4- The charged part of the battery represents graphically the percentage of energy or nutrients contained in the single serving, allowing to quantify it also visually. For a balanced daily diet the sum of what they eat during the day should not exceed 100% of the recommended daily intake amount.

85%




D20) Compared to labels currently on the pack of food products that you purchase and consume regularly, what is your level of interest in this new proposal for additional nutrition labelling of food products?

# Why? The new proposal is considered easy to understand and provides relevant information for 8 out of 10 consumers



**For 84% of consumers the proposal it's very clear, not confusing and it is easy to understand by everyone**



**84%**

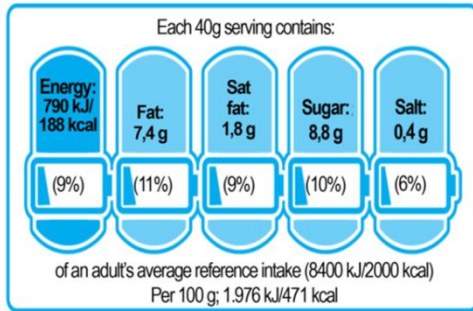


**83%**

**Provides a lot of useful and relevant information for me**

Q21) I would like to know how much you agree that these phrases describe the opinion you might have regarding this additional nutritional labeling FOP of food products? Top box:% of strongly agree + quite agree

# For about 80% of consumers the battery helps the balance of consumption



Simple, easy and instant viewing

86%

The battery makes you realize every day the amount of nutrients you are taking

81%

It helps you adjust your daily intake of various nutrients

78%

Q21) I would like to know how much you agree that these phrases describe the opinion you might have regarding this additional nutritional labeling FOP of food products? Top box:% of strongly agree + quite agree

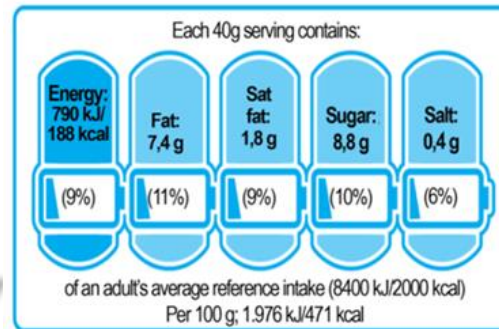


# The new proposal educates and promotes a healthy way of life for more than 70% of consumers



It helps me to learn more about the characteristics of food products  
85%

It helps me to balance the daily consumption of different foods  
79%



It helps me to take more care of my diet, even for my family  
77%

Would promote a healthier lifestyle for me and even for my family  
74%

Q21) I would like to know how much you agree that these phrases describe the opinion you might have regarding this additional nutritional labeling FOP of food products? Top box:% of strongly agree + quite agree

# Evaluation of Italian proposal for additional nutrition labelling FOP in the mini shelf of products

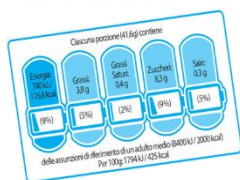


# Procedure of evaluation of Italian proposal for additional nutrition labelling FOP in the mini shelf of products

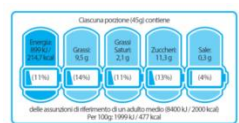


The products consumed in everyday life (from breakfast to lunch and dinner) were displayed, showing on the front of the pack the Italian proposal for additional nutrition labelling FOP (listed below separately). Consumers have expressed their ratings with respect to real stimuli

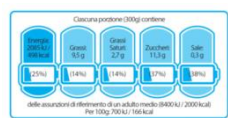
**Biscotto tipo petit**



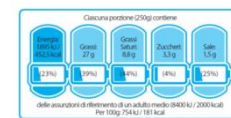
**Muesli croccanti al cioccolato**



**Gnocchi alla sorrentina**



**Pollo alla diavola con patate**



**ARANCIATA lattina 33 cl**



# The new proposal conveys trust towards the products in about of 70% of consumers



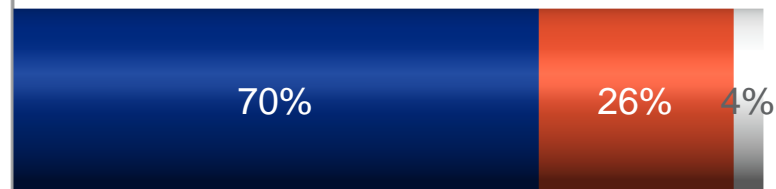
Trust

■ Confident ■ Indifferent ■ Wary



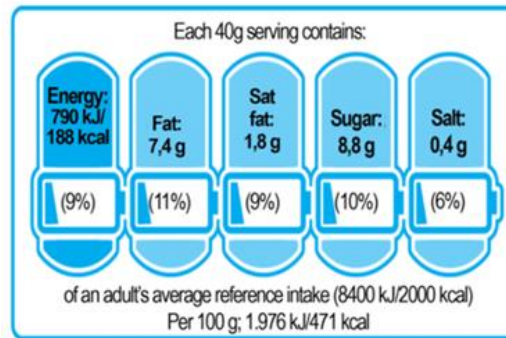
Recommendation

■ Promoter ■ Indifferent ■ Detractor



Q25) How much would you trust of food products that bring this new labelling proposal than what reported today on food labels?  
Q26) Would you recommend food products with this new labeling proposal to a friend or relative?

# Summary of evaluation of Italian proposal for additional nutrition labelling FOP



- **Impact: 87%** of consumers **spontaneously** mentioned one or more **positive reasons** for the Italian proposal for additional nutrition labelling FOP
- **85% of Italian consumers** are **interested** (39% is very interested) in the **new nutrition labelling FOP** compared to the labels currently present on the pack
- The new proposal is considered **easy to understand** and provides **relevant information** for 8 out of 10 consumers
- The Italian proposal for additional nutrition labelling FOP **educates** and **promotes a healthy way of life** for more than 70% of consumers

Back up slide

5

# Details of consumer research

## Sample size

- **1,504** interviews to **represent** and **segment** the **average consumer** according to the principles of scientificity evoked by Article 35.
- Robust, credible and **statistically significant sample** (error margin of +/- 2.5% with 95% confidence interval for the total interviewed values)

## Target

- **Representative sample** of Italian consumers: **men and women aged 18 to 75 years.**
- Representative by gender, age, social class, geographical area and town size

## Methodology

- The quantitative survey was conducted using the CAWI (Computer Assisted Web Interview) methodology

## Sample Extraction Method

A stratified, quota-based sampling method was used for the extraction of the sample.

The selection of the sampling units was according to:

- a casual-systematic criterion for municipalities
- a random criterion for families
- by quotas, for the individuals to be interviewed.

The sample selected from the access panel consists of approximately 60,000 members highly profiled.

## Fieldwork period :

From April 13th to May 2nd 2018

# Profile of consumers interviewed



## Representative sample of the Italian population by gender, age and social class

Gender	Total
• Male	49%
• Female	51%

Age	Total
• 18-24 yo	10%
• 25-34 yo	15%
• 35-44 yo	19%
• 45-54 yo	22%
• 55-75 yo	34%

Social class	Total
• Upper/medium upper	9%
• Medium	55%
• Medium low/low	36%

## Representative sample of the Italian population by geographical area and town size

Geographical area	Total
• North West	26%
• North East	19%
• Center	20%
• South and Island	35%

Town size	Total
• Big cities (more than 100.001 inh.)	33%
• Middle towns (30.001-100.000 inh.)	31%
• Small towns/rurale (less than 30.001 inh.)	36%

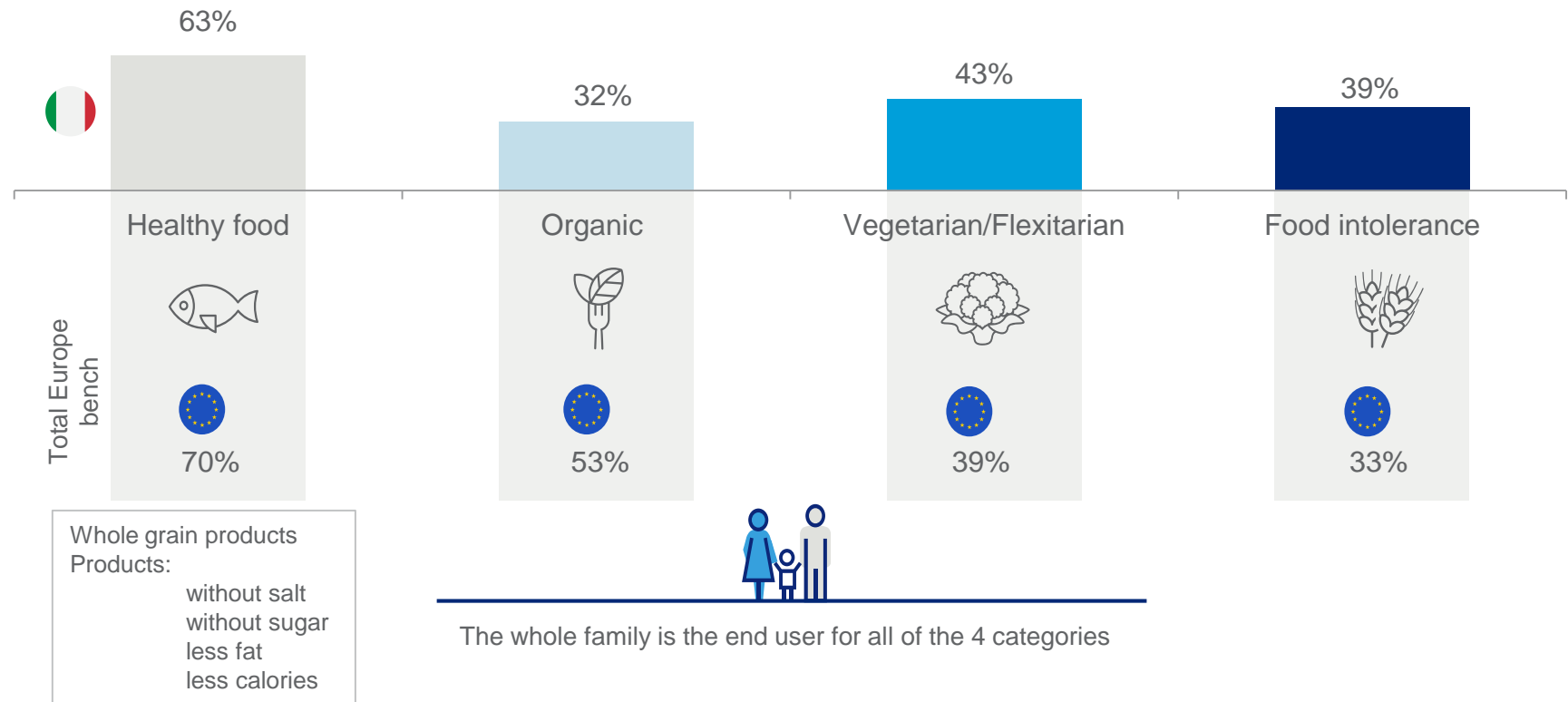
The original universe of reference is made up of individuals resident in Italy aged between 18 and 75 that, on the basis of the most recent ISTAT data, corresponds to 44,302,421 individuals (Source ISTAT demo 2017)



# Consumers are evolving: Wellness has become a relevant part of the “menu” of Italian consumers

IRI Insight contribution with proprietary study

% of wellness consumers – Italy and Total Europe bench



20. Let’s speak about food wellness. Do you buy the following types of food for yourself or your family?

Source: IRI European Shopper Survey - 2017 - Quantitative online survey has been undertaken in 7 European countries on a sample of 2.600 shoppers

# In the purchase of food, the nutritional values are a relevant selection criteria



I am very careful about the quality-price ratio 76%

I pay attention to nutritional value (eg. total calories, sugars, fats, saturated, salt content ..) 72%

Price, I take care not to spend too much 64%

Are brand conscious 56%

Practical aspect, buy food that make life easier 41%

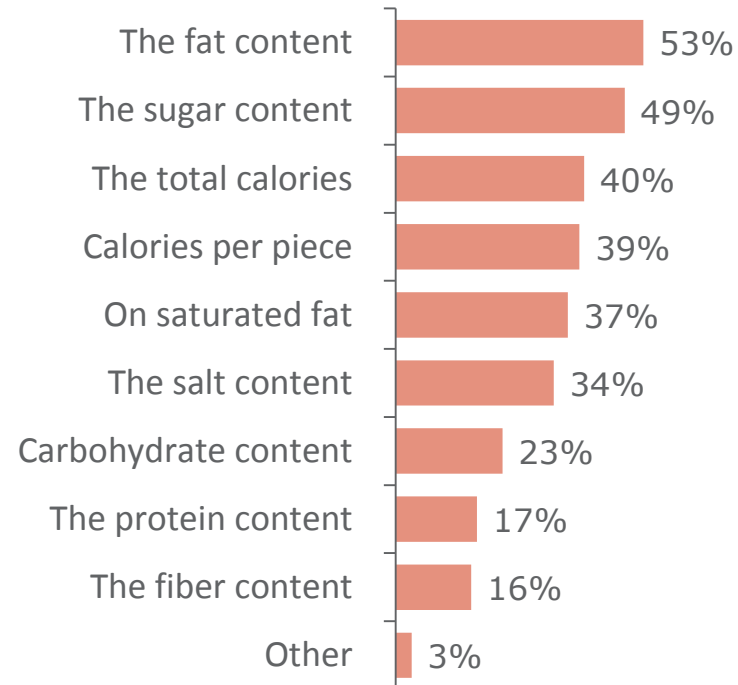
Q15) When buying food products, which of these factors takes more account?

# They are looking for information on nutritional values of foods? Where and what info?



**The label of food products is the main source of information on nutritional values**

## What information do they specifically look for?



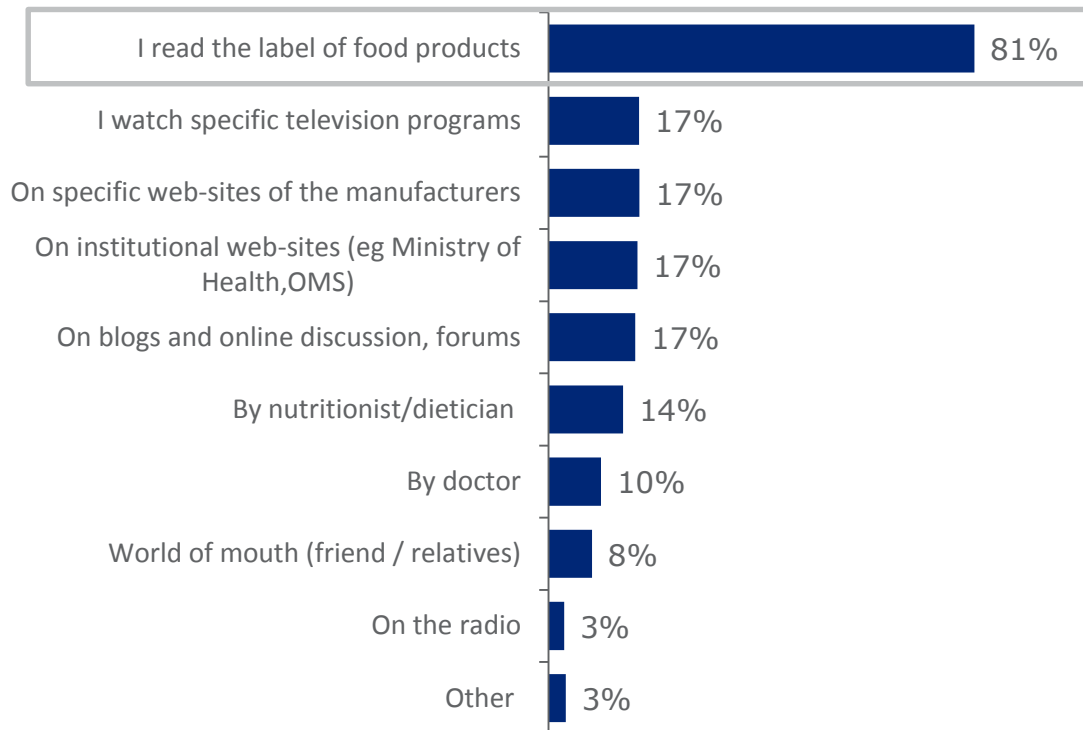
D.8) Did it happen, at least once, to search for information on the nutritional values of food (that is, the nutritious elements of every food you buy and consume)? What information did you look for (multiple answer)?

Number of respondents: 1504 italian consumers

Num. of respondent: 1312 consumers looking for nutritional info

# In detail where they seek information about the nutritional value of food?

The label of food products is the main source of information on nutritional values



## INFORMATION SOURCES



Consumer use on average **1,9 different information sources**



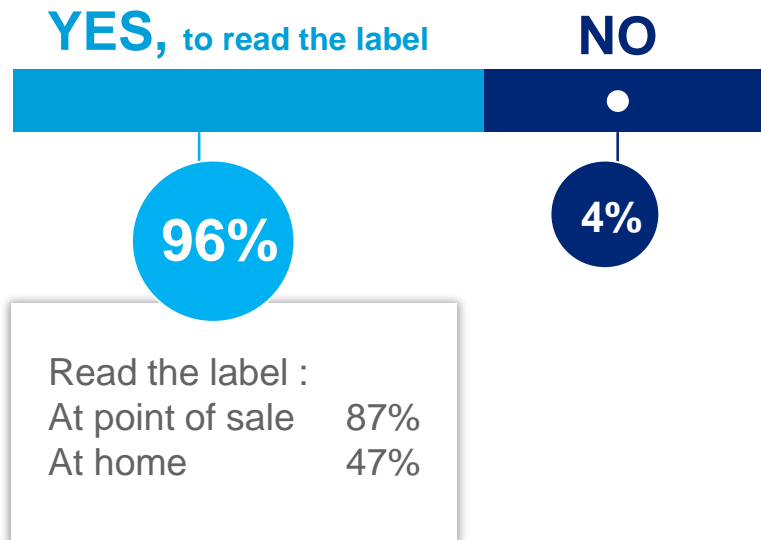
**Read more the label of food product: adults (45-54 yo) 84% and senior (over 55 yo) at 88%**



**Young and Millennials** seek more information on blogs and online discussion forums (24%)

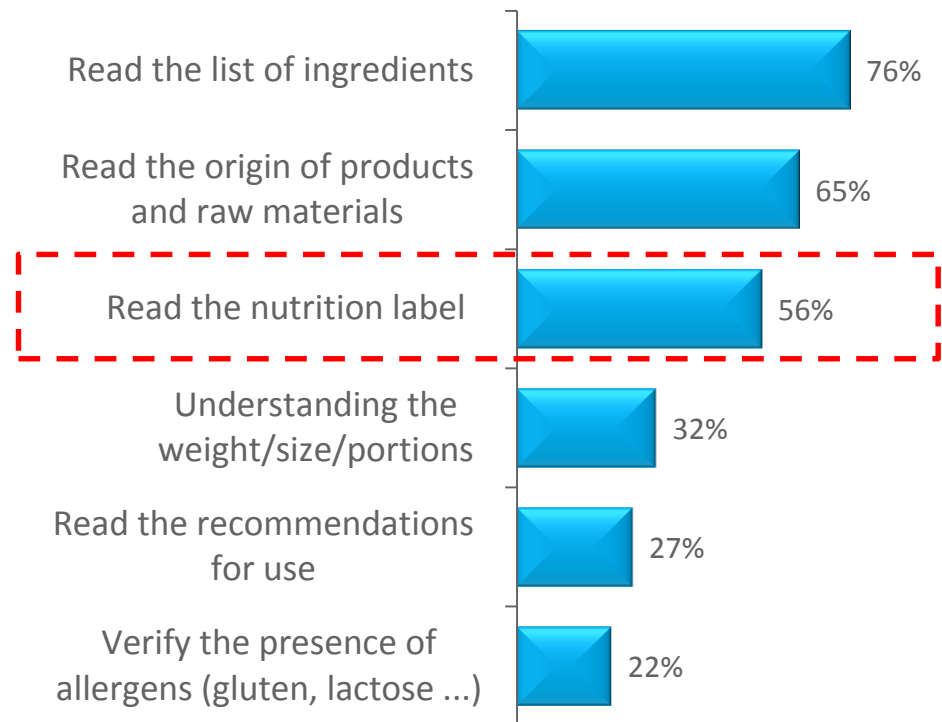
Q.10) Where did you look for information on the nutritional values of foods (multiple answer)?

# Consumers during the purchase check the packaging of food products? 96% of consumers read the label



**High-frequency label reading : 65% of consumers read the food label in the last week**

## Specifically, what do they check on the package during purchase?

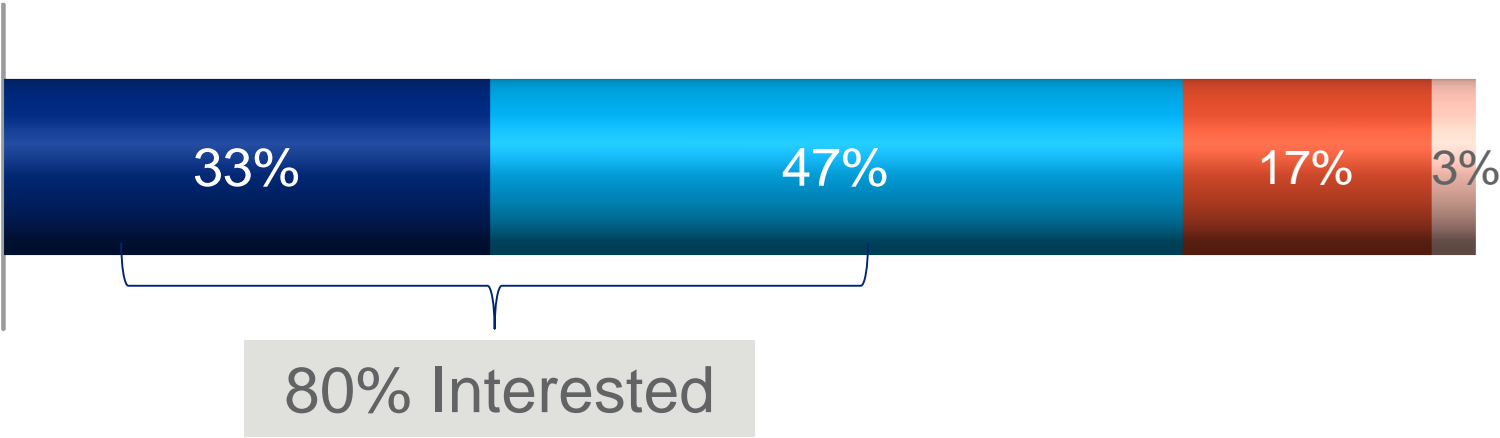


Q11) When you buy food in general, did you check the packaging? If yes for ...

# 80% of consumers are interested in the nutritional label on front of the pack of different food products

Now think about the nutritional label of food products that is currently placed on the back or side of the pack of food products; what could be your degree of interest if this nutritional label of food products was placed on the front of the pack of different food products?

■ Very interested   ■ Quite interested   ■ Little interested   ■ Not at all interested



\*\* High degree of interest among **Women** (84%) and **adults** (45-54 years) to 83%

\*\* Statistically significant difference at 95% compared to the total population



Number of respondents: 1504 Italian consumers

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# Why? Consumer seeks knowledge, information in order to be able to decide independently on purchases

What benefits could you have with nutritional label on the front of the pack..

Top box:% of strongly agree + quite agree



I would understand immediately the nutritional information on the product 85%

It would help me to learn more about the products we purchase 81%

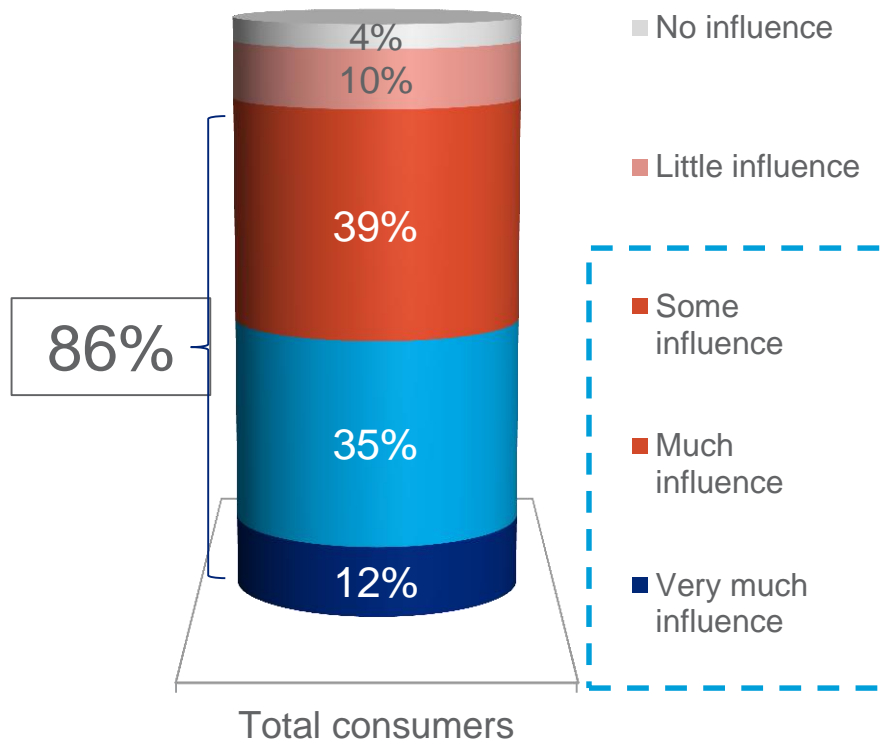
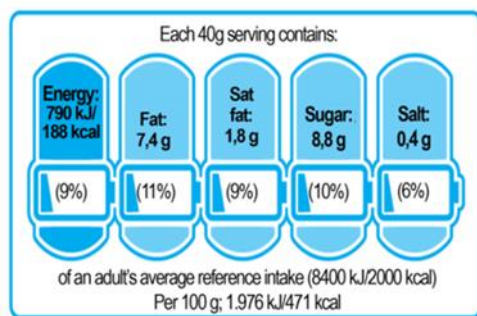
I would be facilitated in purchase 79%

Help me decide the purchase of products based on nutritional values 74%

Help me to take more care of my diet 72%

Would promote a healthier lifestyle for me 69%

# 86% of consumers would be influenced in their purchases by the new proposal for additional nutrition labelling FOP



D22) What influence could have the additional nutrition labelling FOP on its purchases of food products?