

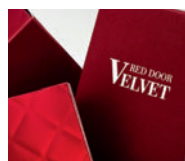
Pro Carton

"Brand recognition"



Pro Carton

What is Pro Carton?



Pro Carton is the European Association of Carton and Cartonboard manufacturers. Headquartered in Brussels, it has offices in 11 countries in Europe who, through various publications, activities and events, promote the use of cartons and cartonboard to a wide variety of people and groups.

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"Brand recognition of different types of packaging"

Pro Carton

"Cartons promote brands"

The effect of packaging on brand recognition

A European report commissioned by Pro Carton



PRO CARTON

Association of European Cartonboard and Carton Manufacturers



Introduction

Cartons promote brands

Index

Introduction

Why is brand recognition important?

Page 3

Methodology and background

An in depth look at how packaging influences brand recognition

Page 4

Case study 1

Frozen food

Page 6

Case study 2

Transparent packaging

Page 8

Case study 3

Biscuits

Page 10

Other examples and results

Confectionery, mayonnaise and sugar

Page 12

Conclusions

Cartons are judged positively in all respects

Page 14

Pro Carton

Contacts for further information

Page 15

Pro Carton

What is Pro Carton?

Page 16

Why is brand recognition important?

I am pleased to be able to introduce a summary report on the latest study carried out by Pro Carton. With an ever increasing number of products being made available for sale and with about 75 % of all purchasing decisions made in front of the shelf, it is critical that brands are recognised quickly and those that are recognised more quickly will doubtless be more successful.

With this in mind Pro Carton wanted to find out how carton packaging performed in comparison with other packaging materials and so commissioned TNS Dimarso* to carry our research in six countries across Europe. A scientific approach was used in this study using the Tachistoscope method whereby photographs of examples of different type of packaging are shown to the respondent for six different amounts of time varying from 0.05 seconds to 0.5 seconds. It can then be established how fast the respondent recognised the brand.

TNS Dimarso, in the summary of their report, state that "cartonboard communicates brands a lot better than other packs" and it is evident from the report that a number of other different characteristics ensure that cartons offer the best chance of a brand being recognised and selected.

Quality of print and strong colour reproduction are important as indeed is legibility and with cartons being made in a huge variety of shapes and surface textures, shelf standout is assured. Respondents felt that cartons were easy to read and recognise and are simple to open and re-close. Also previous studies have shown that consumers value the fact that cartons are made from natural, renewable materials and can, and are, easily recovered and recycled. Cartons offer a rigidity that consumers value and feel comfortable with and find them not only easy to recognise in the retailer but also easy to use at home.

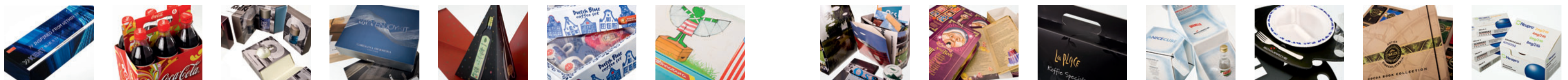
In the following pages you will find as well as the results, details of the methodology used and I hope you will find this report interesting and useful and an insight into how important packaging is to consumers to help them recognise brands amongst the huge variety of products on offer. It is obviously impossible to report on every product that was studied, but Pro Carton will be happy to talk to people interested in getting additional details of this report and can be contacted via www.procarton.com.



Mike Clark,
President of Pro Carton

TNS Dimarso was commissioned to carry the "brand recognition" research in six countries across Europe: Belgium, France, Germany, United Kingdom, Poland and Spain.

*www.tns-global.be



Methodology and background

An in depth look at how packaging influences brand recognition

"It was therefore against this background that Pro Carton decided to look in depth at how packaging can influence brand recognition."

Brand recognition at the point of sale is one of the key areas to ensure a successful product. The numbers of products available on retailer's shelves is increasing all the time and amongst those products more and more variants of the same product are being launched. The consumer is therefore faced with a vast array of different items and with most people having less and less time to spend shopping, it is vital that brands attract the eye and appeal to potential buyers.

Recent research has indicated that, even after making a shopping list, about 75 % of all purchases are unplanned. Whilst a consumer may know they wish to buy a product, which exact brand they will finally select is usually left until they are in front of the range of products on the shelf. Eye tracking research indicates that the time the eye actually looks at a product is very short and so instant appeal of the product on the shelf is critical for a product's success. Also, as conventional advertising has become more and more fragmented, a greater number of brand selection decisions are left until the consumer is actually in front of the shelf and the packaging itself becomes the advertising for that product.

Communication of brands is therefore vital and packaging plays a significant role in this. Packaging has a multitude of roles to perform. Safe transportation of the product from manufacturer to retailer, legibility of instructions and contents so that consumers understand the product and its use and secure storage of the product throughout its life. In addition the packaging has to be safe, easy to pick up, easy to use in the home and simple and convenient to dispose of, preferably to be recovered and recycled. As elderly people form an increasing proportion of the population throughout Europe, it is also necessary that packaging suits their needs where legibility and ease of use are two of the most important considerations.

It was therefore against this background that Pro Carton decided to look in depth at how packaging can influence brand recognition.

Some years ago Pro Carton ran a similar study but only in Belgium and for this new study it was decided to look at six different countries. Belgium was once again chosen but this time similar studies were also carried out in Germany, UK, Spain, France and Poland to see if there were any significant differences

between countries. Products and brands were chosen from across the spectrum and included such markets as frozen food, sugar, biscuits, rice, pasta and many others.

For each category chosen in each of the countries studied, two product examples were purchased from local retailers. In some cases both examples were of the same brand but packaged in different types of packaging. In others competing brands were chosen again packed in different types of packaging.

Approximately 200 respondents were chosen in each of the countries

studied and they were selected as those responsible for the shopping for their household. A variety of age groups were selected to see if there were differences in responses. The testing was carried out using the Tachistoscope method and respondents were shown photographs of the products for six different periods of time varying from 0.05 seconds to 0.5 seconds. The time at which they were able to correctly identify the brand was recorded. All the photographs used in the research were taken to replicate the way the product looked on the retailer shelf.

Categories tested by country

Category	Belgium	France	Germany	UK	Poland	Spain
Ready to eat	X					
Frozen food	X			X	X	
Confectionery	X			X		X
Biscuits	X	X	X	X	X	
Sugar		X				
Cake		X				
Mayonnaise		X				
Rice			X			
Pasta			X	X		X
Soup			X			
Soft Drinks					X	
Dental Care					X	X
Canned food						X

Each respondent in each country was shown three different sets of examples and each was also asked questions afterwards covering their likes and dislikes of the packaging they had been shown. All the research and fieldwork was carried out between 11th June and 2nd July 2007.



Case study 1

Frozen food

Frozen food packaging was tested in several countries and there were both similarities and differences in the results obtained in the study. This is a large diverse market and with so many products on offer, fast and accurate recognition is vital.



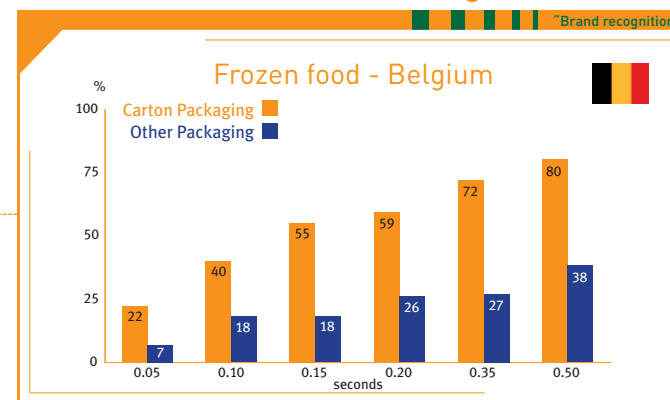
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Belgium

In Belgium, similar potato products were tested packed in both a carton and a flexible plastic bag. Respondents were measured on the speed with which they recognised

the brand and the results of these tests show that the speed of recognition of brand was much faster for the carton packed product than the flexible packed product. The graph below shows clearly the greater speed of recognition.

How fast are brands recognised?

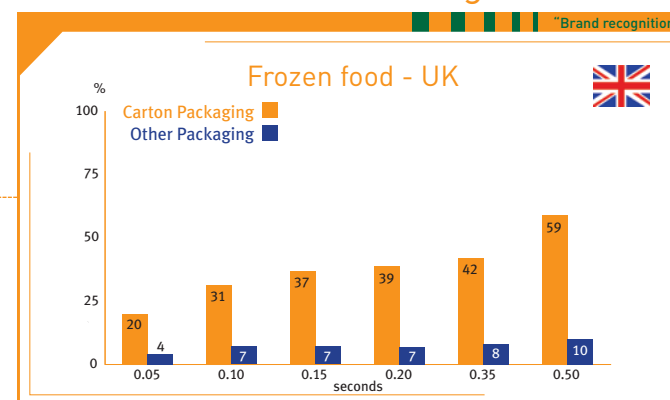


United Kingdom

In the UK, testing a very similar result was obtained using a well known brand packed in a carton compared

with a supermarket own brand packed in a flexible plastic bag. It can clearly be seen from the graph below that the carton packaged product offered much faster consumer recognition with 59% recognising the carton packed brand within half a second compared with only 10% recognising the bag packaged brand.

How fast are brands recognised?

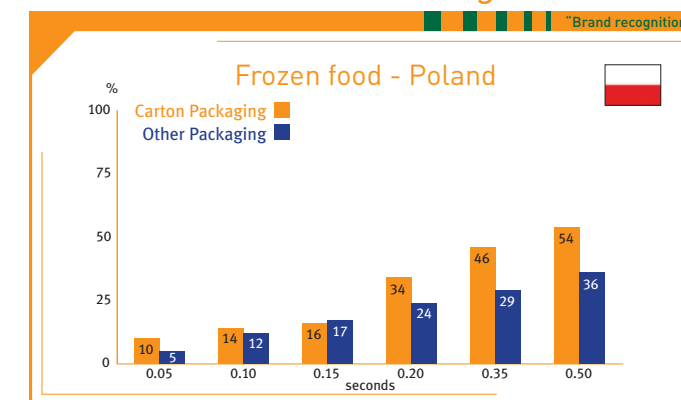


The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Poland

In Poland however, the results were closer. When it came to recognising the brand, the carton packed brand was recognised 50% more quickly with 54% of respondents identifying the carton packed brand in comparison with only 36% recognising the bag packed brand.

How fast are brands recognised?



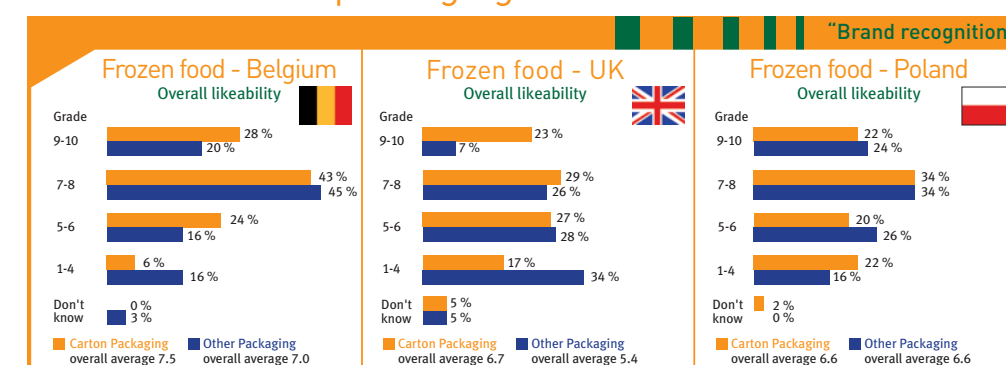
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Conclusion

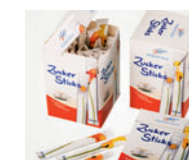
Respondents in all tests were also asked which type of packaging they liked more and the tables below show the result of these questions in each of the three tests. Each respondent was asked to rate how much they liked each packaging type between 1 and 10 with 10 being liked a great deal. From the results obtained an average figure for each type of packaging in each country was derived. Whilst the results

of the respondents in Poland show very similar levels of likeability, in both Belgium and the UK there was a marked preference for carton packed products with the average score in Belgium for cartons being 7.5 compared with 7.0 for the alternative packaging material. In the UK the comparable results were 6.7 for cartons and only 5.4 for the flexible bag.

How much is the packaging liked?



In the frozen food sector carton packed brands were identified more quickly and liked more by respondents.



Case study 2

Case study 2

Transparent packaging

Many products are packaged in clear packaging. This can take the form of a clear plastic bag or pouch, glass or cartons with a window and it was decided to look in greater detail at examples to see what the speed of recognition of the brand was. It was established that recognition speed of the actual product was faster in general when clear packaging was used. However, consumers tend to buy brands and not simply products and so the key measure is how fast a brand is identified and three examples of this type of packaging are looked at below.



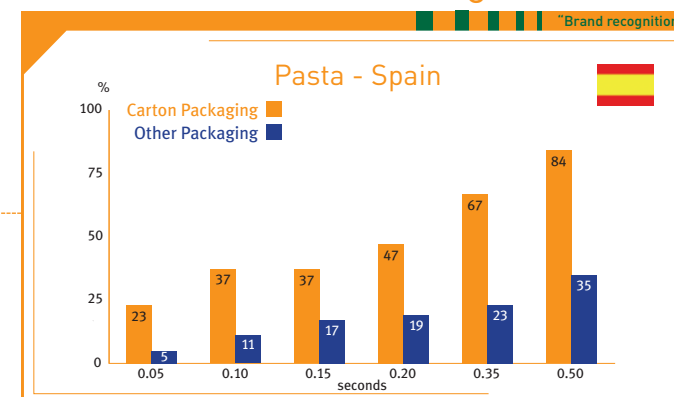
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Pasta – Spain

In Spain, the results for the comparison between two pasta brands show that the product

packed in a carton scored significantly better with 84 % naming the brand after half a second compared with only 35 % for the plastic pack.

How fast are brands recognised?

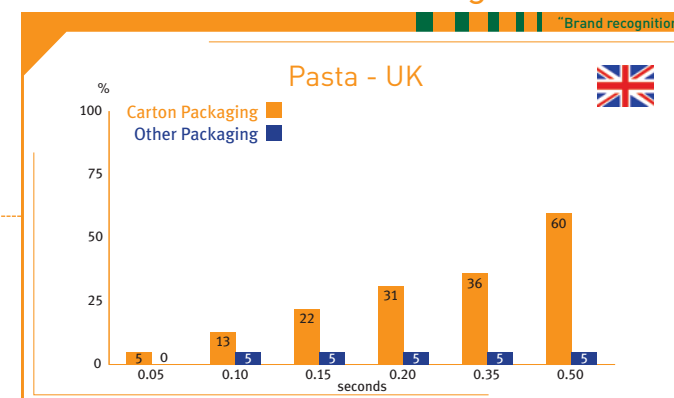


Pasta – UK

In the UK, the difference in brand recognition speed was significant with

60 % recognising the carton packed brand whereas only 5 % were able to identify the plastic packed brand in the same time. It is also interesting to note that whilst the brand recognition increased with time for the carton packed product, on the plastic bag product, the recognition time remained static indicating that on this pack it was very difficult to identify the brand.

How fast are brands recognised?

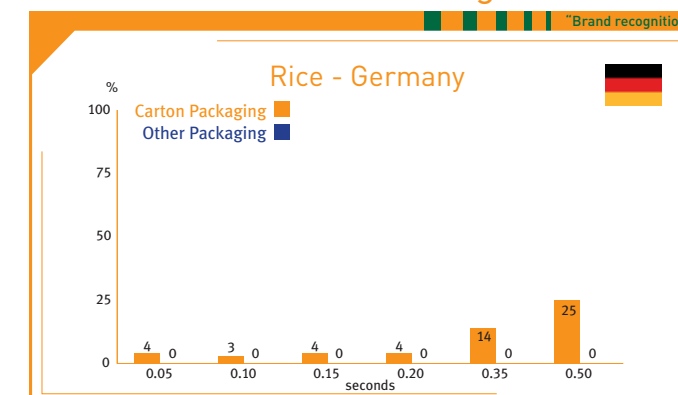


The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Rice – Germany

Once again in the tests on the German rice products, recognition of the actual type of product was greatly helped, it is felt, by the see through packaging used on the non carton example and whilst for both products, brand recognition was below the levels in other countries, the carton performed well ahead of the alternative material which in fact was not identified by any respondents.

How fast are brands recognised?



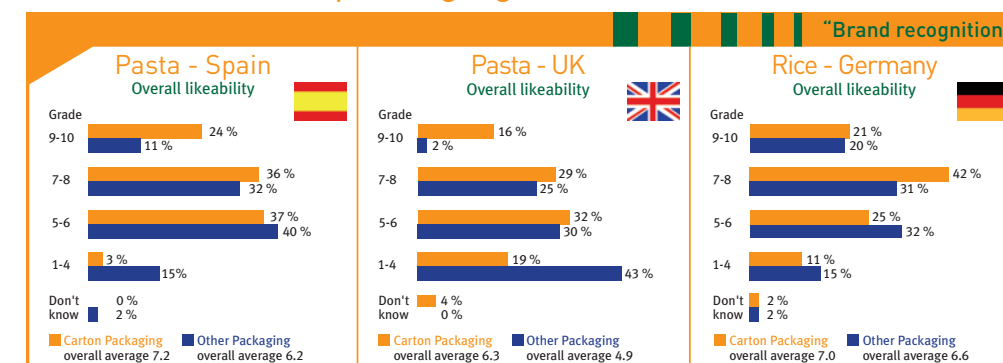
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Conclusion

In all these three examples, when respondents were asked which pack they preferred, cartons scored well ahead of the alternatives. So whilst product recognition was generally

better in the non carton examples, identification of the actual brands amongst the products was far better on the carton examples.

How much is the packaging liked?



Whilst recognition of the product was faster in clear packaging, identification of the actual brands was much faster when they were packed in cartons.

Case study 3

Biscuits

Biscuits are one of the sectors with the largest variety of products and brands. Many similar products are sold under different brands and so in this sector particularly, it is vital that identification of brands is as fast as possible. Consumers will have decided to buy biscuits but the brand they select will more often than not be an impulse purchase. This can be driven by brand, an attractive pack, colour, shape and a whole variety of other stimuli. It is for this reason that the speed of recognition of brands is so important and below are the results of an examination in this sector in the UK, Germany and Poland.

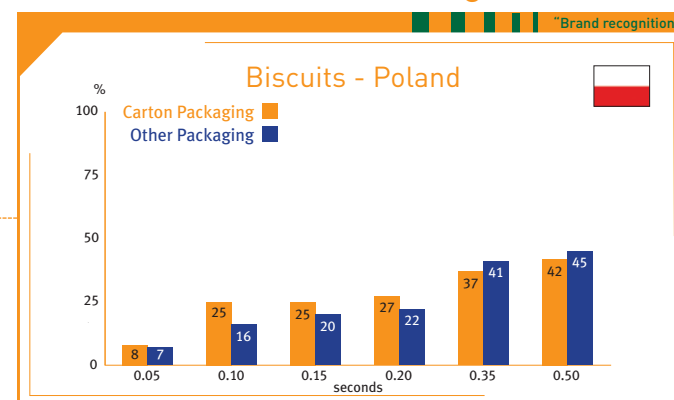


The X axis shows the different time periods in seconds that the photographs were shown to respondents. The Y axis shows % of respondents who correctly identified the brand in that time.

Poland

The results of the Polish biscuit carton were very similar to the

How fast are brands recognised?



German example with the carton packaged brand being recognised faster when the photograph was only shown for a very short time. Overall the brand was not recognised as well in Poland as in the other countries.

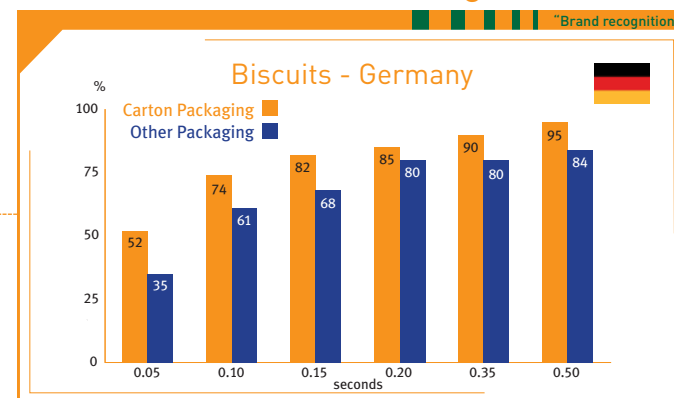


The X axis shows the different time periods in seconds that the photographs were shown to respondents. The Y axis shows % of respondents who correctly identified the brand in that time.

Germany

Recognition of both product and brand in the German tests were

How fast are brands recognised?



broadly similar with cartons leading by a small margin. In this test the brands selected were the same but in different packaging and so recognition speeds were broadly similar though cartons were recognised more quickly when the photographs were only shown for a very short time.

United Kingdom

In the UK, the biscuit market is very large and more and more products and brands vie for shelf recognition.

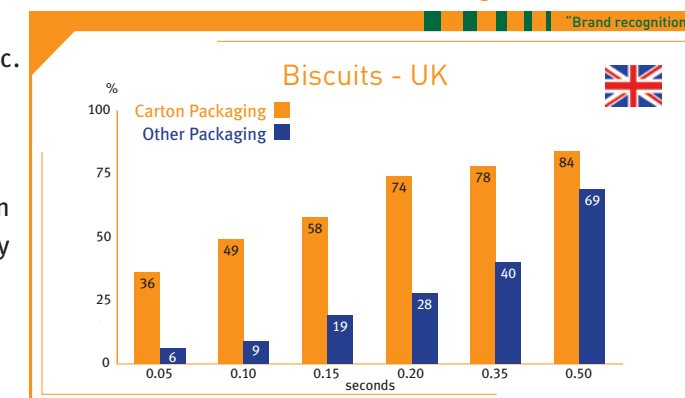
The results of the sample biscuit packs from the UK indicate that product recognition speeds are more or less similar but brand identification is faster

for the carton pack tested than the alternative packed in flexible plastic. This is especially true when the time was very short so that when respondents were shown the photographs for only 0.1 of a second, 49% recognised the brand

packed in a carton with only 9% recognising the brand packed in flexible plastic.



How fast are brands recognised?



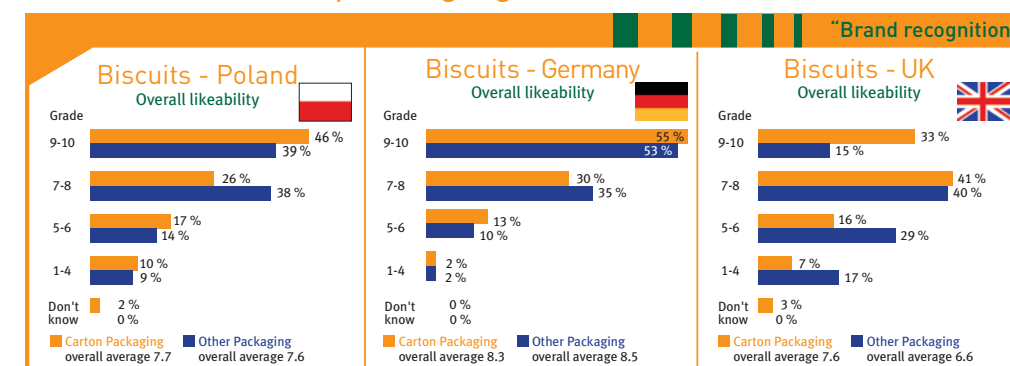
The X axis shows the different time periods in seconds that the photographs were shown to respondents. The Y axis shows % of respondents who correctly identified the brand in that time.

Conclusion

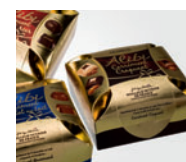
In the likeability tests it is interesting to note that whilst the UK example packed in a carton is preferred with an average score of 7.6 for the carton

compared with 6.6 for the flexible pack, in both Germany and Poland the figures were very similar for both types of packaging.

How much is the packaging liked?



In the very competitive biscuit sector, cartons have an advantage in the speed of brand recognition.



Other examples and results

Confectionery, mayonnaise and sugar

Whilst it is not possible to look, in this summary, at all the products tested during the survey, in this section you will see the findings from three other pairs of packaging in different market sectors. Recognition at the point of sale is a vital element in the marketing mix in all product sectors and this section looks at three distinct markets to give a feel of how recognition varies depending on the type of packaging used.



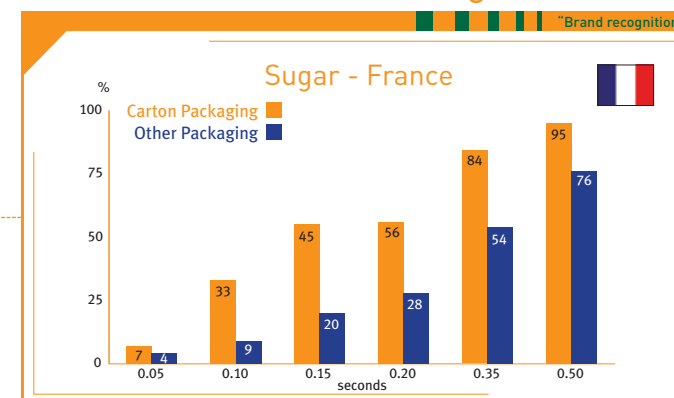
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Sugar – France

The first example of sugar packaging in France compares a carton with a

plastic pouch and as the figures below show the brand recognition of the carton was significantly better than that of the pouch with 95 % of respondents correctly identifying the brand after half a second compared with only 76 % who identified the brand packaged in the alternative material.

How fast are brands recognised?



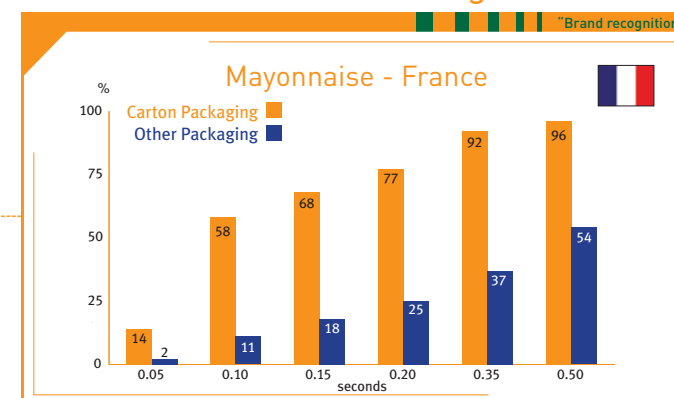
The X axis shows the different time periods in seconds that the photographs were shown to respondents.
The Y axis shows % of respondents who correctly identified the brand in that time.

Mayonnaise – France

In this example in the mayonnaise sector, a carton packed tube of mayonnaise has been compared with a more conventional glass jar.

Despite the fact that the vast majority of this type of product is sold in jars, the brand was recognised more quickly in the carton than in the bottle. The difference in speed of recognition was more apparent in the shorter time tests and so when people have less and less time to look and survey all that is on offer, it appears that cartons are recognised more quickly.

How fast are brands recognised?

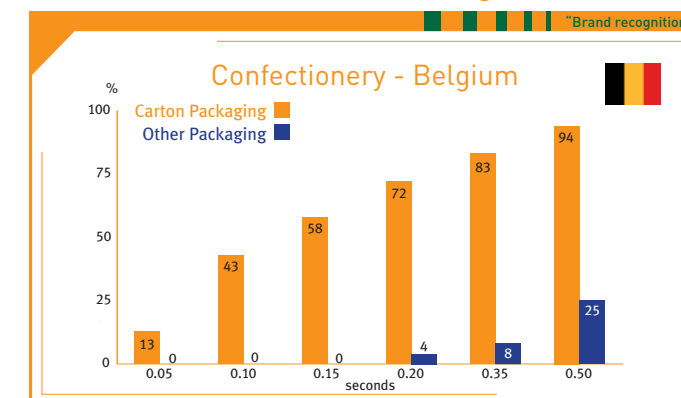


Confectionery – Belgium

In the final example, a carton of confectionery has been compared with a plastic bag. Whilst the visibility of the product is better in the clear bag, if the consumer is searching for a brand then the graph below shows that the brand was recognised on the carton far better and in fact on the shorter exposure times the brand on the bag was not identified at all.



How fast are brands recognised?



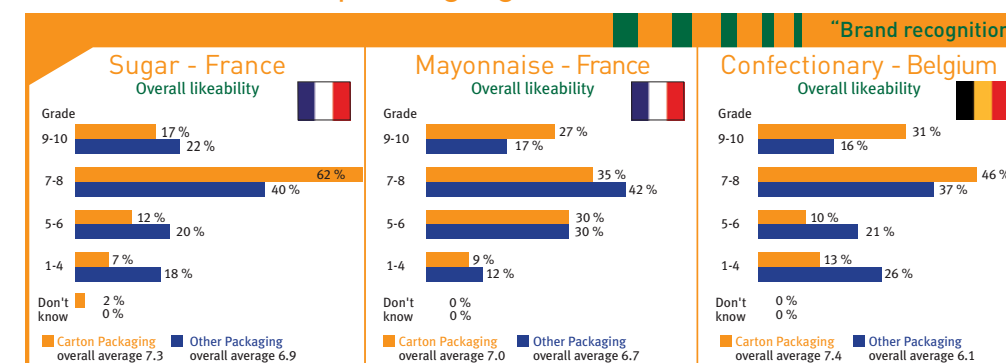
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Conclusion

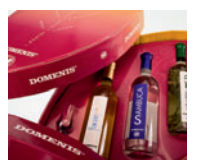
When respondents were asked which type of packaging they preferred in all these three examples, cartons were the clear favourite in each case

with average readings for cartons varying from 7.0 to 7.4 compared with the other materials varying from 6.1 to 6.9.

How much is the packaging liked?



Accurate brand identification is clearly faster for products packed in folding cartons.



Conclusions

Pro Carton

Cartons are judged positively in all respects

- It is clear from this research that generally, brands packed in cartons are recognised more quickly in almost all cases.
- With fast recognition, cartons offer ideal marketing and advertising opportunities.
- Consumers usually know what products they wish to buy but tend to make decisions about which brands to buy in store.
- In most cases the respondents preferred the carton packaged products to the alternatives.
- Even in the mayonnaise sector where glass jars dominate, the carton packed alternative provided faster brand recognition.
- The most liked aspect of cartons amongst respondents were
 - Better colours and print quality
 - More attractive and eye catching packaging
 - Easier to pick up and use
 - More recognisable and easier to read
- Transparency of packaging helps recognise the product but not necessarily the brand.
- Not only luxury products benefit from carton packaging. Recognition is vital in all market sectors.
- The fact that about 75 % of all purchasing decisions are made in store means that brand recognition is vital.
- With less time available to select items, speed of brand identification is critical.

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