

Is Sustainability in Packaging Important?



Consumer Attitudes on Packaging & Sustainability

Summary of a report commissioned from GfK by Pro Carton



PRO CARTON

Association of European Cartonboard
and Carton Manufacturers

Summary

This report shows unequivocally that Sustainability in packaging is important and consumers are interested in, and concerned about this issue. Over 64% of respondents said that packaging should consist of environmentally friendly materials and over 55% felt that packaging should contain as little plastic as possible. People are aware that cartons are made from a renewable resource and that cartons can be recovered and recycled more effectively than other materials. As one respondent says "Cartons or paper can be reused in various ways. Furthermore it is produced from renewable resources". Consumers also felt that cartons made of cartonboard were easier to recognise on the shelf and one said "plastic harms the environment and the look of a product".

Introduction by Stéphane Thiollier – President of Pro Carton



Sustainability is at the top of the agenda in all aspects of people's lives, and Pro Carton was keen to look in detail at the expectations and wishes of consumers regarding sustainability and packaging. We also wished to examine if there were differences in attitudes between different types of people – defined as different types of Corporate Social Responsibility (CSR) types – and also to look at whether there was a willingness to pay an additional price to ensure real sustainability in packaging.

We commissioned GfK in Germany to look in detail at these questions and whilst the survey they carried out was conducted only in Germany, GfK have advised us, that based on their experience across Europe, they feel that these results are likely to be replicated to a large extent across the whole of Europe, especially western Europe.

This booklet provides a summary of the main findings of this comprehensive and detailed report and the full text of the report is available to all members of Pro Carton.

We hope you find this both interesting and informative and that it adds to the knowledge pool on this vital and current topic.

Background and methodology – Thomas Bachl, General Manager GfK Germany



The purpose of the study was to address the following questions:

- What relevance does packaging have in purchasing decision making?
- How relevant is sustainable packaging?
- What type of packaging does the customer judge as sustainable?
- Do consumers of different CSR-Clusters have different preferences?

In developing this report, we were also able to utilise research we had carried out with Roland Berger Strategy Consultants that identified five different types of CSR consumers. This enabled the report to be more focused and also show the differences in needs and opinions between the various types of consumer.

The research used focus groups to explore the basic attitudes and ideals for packaging for both those interested in Corporate Social Responsibility and also those that were not. In addition, interviews were carried out with 2,500 households with 500 being drawn from each of the five different consumer types. And finally the purchasing behaviour in terms of packaging preferences was established with a panel of 30,000 consumers



Purchasing criteria

It is critical to establish at the outset what is the importance of the different reasons that consumers buy products. This was discussed in the focus groups and showed that packaging is a vital element in the decision making process. Various different types of products were looked at but in virtually all sectors, the focus groups felt that packaging was a key element.

Criteria for buying-decision	Sweets	Hot Beverages	Yoghurt	Groceries (pasta, rice)	Frozen products	Washing agents	Cosmetics
Quality, Product performance		●	●	●			●
Brand	●	●		●		●	●
Price		●	●	●	●		
Ingredients	●	●	●	●	●		●
Naturalness, organic, ecological			●				●
Packaging, Look	●		●	●	●	●	●
Kind, Shape of product		●		●		●	

"Must have" requirements

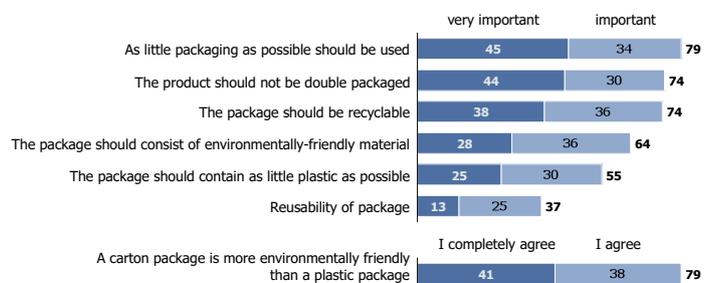
The focus groups were also asked for a greater breakdown in some of the purchasing criteria to establish what are the most important elements. Most important within the sustainability criteria: using as little packaging as possible is consistent with the product being adequately protected. But packaging that is recyclable and made from an environmentally friendly material is also considered very important.

	"Must Have"-Requirements		"Nice to have"-Requirements	
Information Function	• Date of expiry	4,5	• Look	2,6
	• No air package	4,3	• Disposal information	3,0
	• Ingredients	4,2		
	• Information on calories	3,6		
Sustainability Function	• Little package	4,2	• Reusability	3,1
	• Recyclable	4,0		
	• environmentally friendly material	3,8		
Convenience Function	• Easy opening	4,0		
	• Easy handling	3,9		
	• Resealability	3,8		
Safety Function	• Protection of Product	4,2		
	• Stability	3,8		

Mean (1 = not important at all; ...; 5 = very important)

Important sustainability elements

The various different aspects of sustainability were then looked at in more detail with the focus groups. Around 75% of respondents see it as important that as little packaging as possible is used, that there should not be double packaging and that the packaging should be recyclable. Nearly two thirds wanted packaging to be made from an environmentally friendly material and 55% said it was important that any packaging should contain as little plastic as possible.

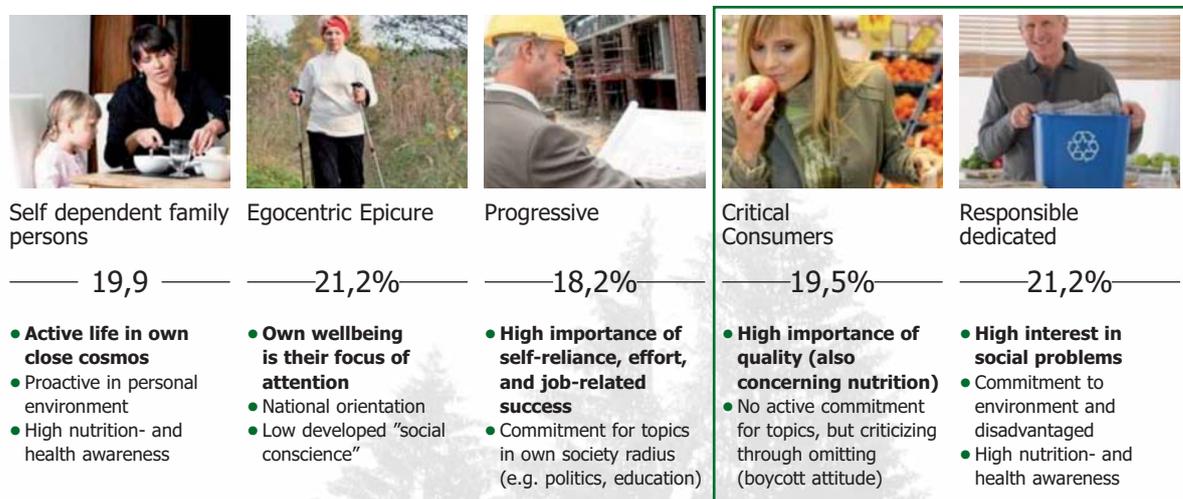


GfK Domestic panel, n=2.500, September 2009



Different target groups

In developing this report, GfK utilised extensive research that they had carried out in association with Roland Berger Strategy Consultants to break down the population into different types of purchasers. They looked at over 40,000 people and established 5 different types of purchasers and also defined the different characteristics that these different groupings show. As can be seen from the chart below, the five different groups represent almost exactly equal parts of the population.



%-Data = share of total population

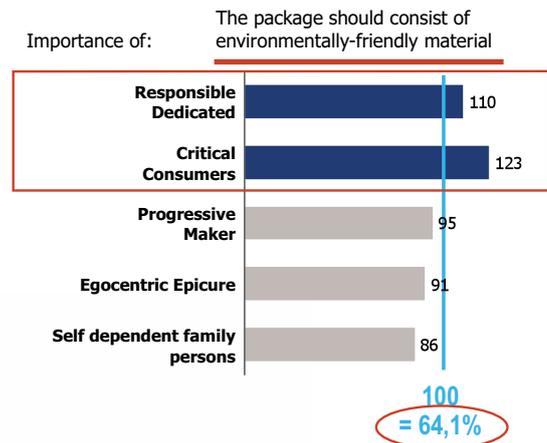
The reason for using these different types of purchasers was that it would be possible to better understand the differing needs and requirements of these groups and it also shows that differing types of purchasers do not react in the same way and that there is substantial divergence in their requirements and opinions.

It will be seen from the following charts that the reactions of the different groups vary quite substantially and that some groups focus more on some areas than others.



Environmentally friendly materials

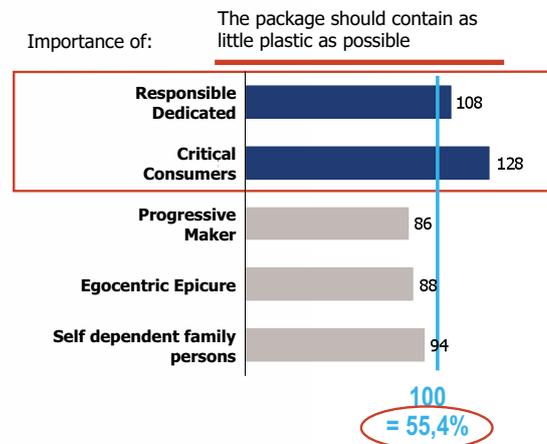
In total over 60% of respondents said that it was important that packaging be manufactured from an environmentally friendly material. But the proportion of "responsible dedicated" and "critical consumers" was much higher than the other groupings with the "self dependent family" group being the lowest.



GfK Domestic panel, n=2.500, September 2009

The use of plastic

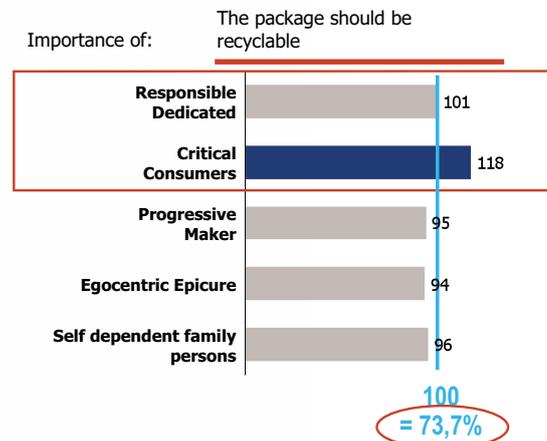
When asked specifically about the use of plastic in packaging, just over 55% said that they would like packaging to contain as little plastic as possible. Once again the highest figures came from the "responsible dedicated" and "critical consumers".



GfK Domestic panel, n=2.500, September 2009

Recyclability

When asked if packaging should be recyclable, nearly three quarters of all respondents said that this was important. The differences between the different groupings was not as marked as in the previous two examples and therefore this can be seen as one of the key criteria of packaging expected by all consumers.



GfK Domestic panel, n=2.500, September 2009



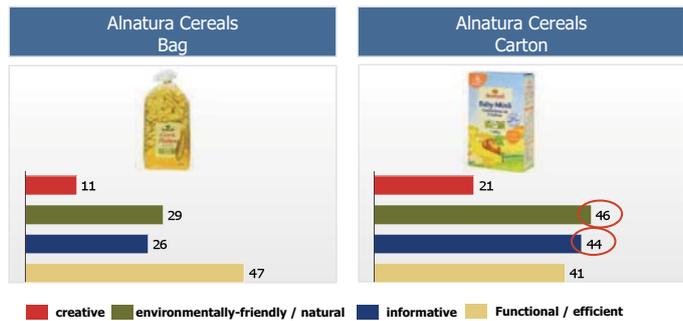
Packaging preferences

Consumers were asked to look at different types of packaging for the same product and asked to give their preferences in terms of creativity of the pack, environmental friendliness, the information contained on the pack and how functional and efficient they felt the pack was.

In the first example for a cereal product, on three of the four criteria, consumers felt the carton was better. Whilst the plastic bag was thought to be more functional and efficient, in the other three areas the carton was liked almost twice as much.

In the detergent sector the results were very much the same, with plastics being preferred from a functional point of view but the carton was preferred on all other criteria.

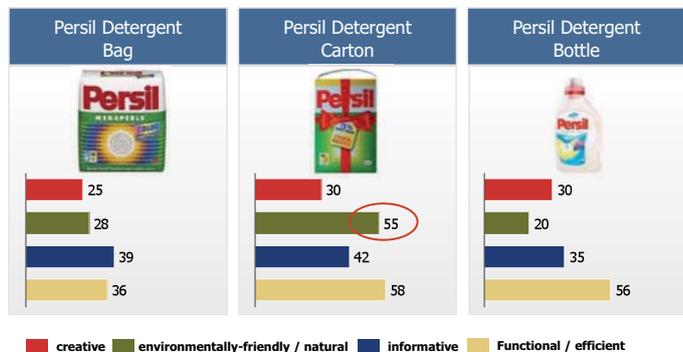
Finally three different types of packaging were evaluated for Persil detergent with a plastic bag, a plastic bottle and a carton. All three types of packaging were seen as very similar with regard to the creativity of the pack and the ability to carry information. But the perception of environmental friendliness and naturalness was more than twice as high for the carton, showing that consumers really feel that a carton is both good for the environment and made from a natural material.



GfK Domestic panel, n=2.500, September 2009



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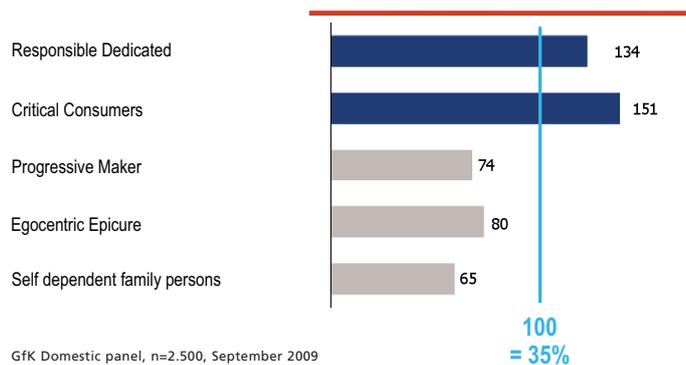


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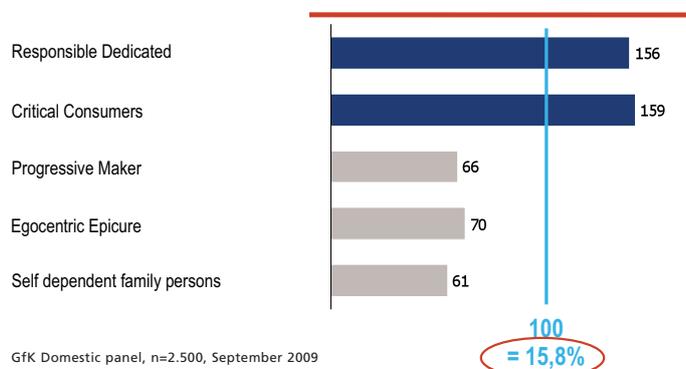
How important is sustainability in packaging?

All respondents were asked how important the sustainability of the packaging was to them when choosing what products to buy. It can be seen from the table alongside that overall 35% of all respondents considered this an important aspect when choosing what to buy. But there is a distinct variation between the different purchasing groups with the "responsible dedicated" and "critical consumers" seeing this aspect as nearly twice as important.



Will consumers pay more for sustainable packaging?

The 2,500 respondents were also asked if they agreed with the statement "I am willing to pay a higher price for an environmentally friendly package". Overall 15.8% of all respondents said they either completely agree or agree but yet again there was a distinct variation between the different consumer groups. The "responsible dedicated" and "critical consumers" both agreed with the statement to a much higher level and when compared with the self dependent family people were nearly three times as likely to agree.





Pro Carton is the Association of Cartonboard and Carton Manufacturers. Its main purpose is to promote the use of cartons and cartonboard to brand owners and retailers as well as designers, the media and regulatory decision-makers as an economically and ecologically balanced packaging medium which plays an important role in society

For further information, please visit www.procarton.com

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