



European Consumer Packaging Perceptions study

An independent assessment of the
importance of packaging sustainability
on consumers' purchasing decisions.



PRO CARTON
PACKAGING FOR
A BETTER WORLD

Outline of the study

The study, conducted independently by Coleman Parkes Research and commissioned by Pro Carton, surveyed 7,000 consumers across seven countries – **France, Germany, Italy, Poland, Spain, Turkey and the United Kingdom.**

The research was designed to gauge consumers' views on different packaging formats and understand their attitudes to packaging sustainability.

COLEMAN ✓ **PARKES**

R E S E A R C H



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Introduction

Tony Hitchin
General Manager
Pro Carton



“We are pleased to present the findings of our largest consumer study to date, conducted independently in seven key European markets. It stands to help us appreciate consumer attitudes to sustainability in packaging and the extent in which recent media attention is influencing consumers’ purchasing decisions.

The results speak for themselves. Consumer attitudes are changing and there is a growing consensus that brands and retailers need to act and make necessary changes for both the future of the planet and their businesses.

These findings should be held as an important reminder to us all. The environment has never been so high on the agenda and consumers are willing to act to protect it, be that with their feet or their wallets. It’s time for us all – associations, brands, retailers and manufacturers – to listen to consumers and make sure that packaging sustainability is a priority for us all.

We hope you find the research thought provoking, useful and an inspiration for the change we want and need; helping the industry to move one step closer to the sustainable circular economy which we strive for.”

Horst Bittermann
President
Pro Carton



“The consumer voice in the study clearly demonstrates the paradigm shift in Europe from a linear to a circular economy. A circular economy approach looks beyond take-make-discard processes of production and consumption to models that keep packaging materials in the loop, eliminate pollution and regenerate natural resources.

Folding cartons and cartonboard preserve the quality of the packed product, promote the sales as being an extremely eye-catching medium, and protect the environment – they are renewable, recyclable and biodegradable.

It is pleasing to see that European consumers recognise and appreciate cartonboard as the most environmentally-friendly and recyclable form of packaging, influencing their buying habits to a growing extent.

I am confident that cartonboard and folding cartons will become the most widely-used packaging medium in the coming decade and that Pro Carton can play an important role in achieving that success. It is time now for brands and retailers to take note of the benefits, and the insights represented in this report, and make the change today for a better tomorrow.”

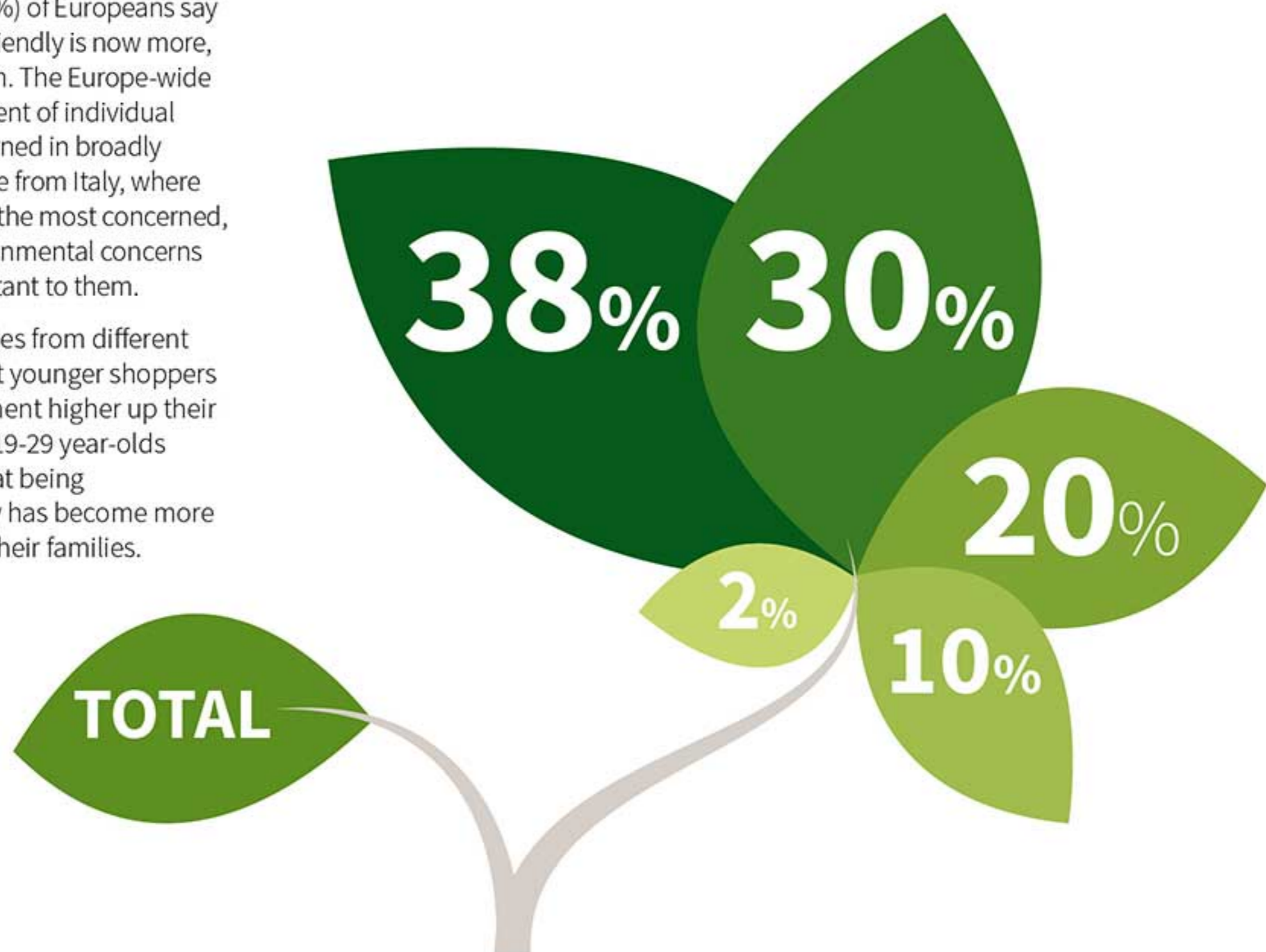
Attitude adjustment

There's no doubt that the environment is climbing the agenda across Europe. An intense media focus fuelled by increasingly urgent calls from environmental campaigners for the world to address the literal rising tide of unwanted waste, is making inroads into consumer, industry and political thinking.

To what extent has being environmentally-friendly become more important to you and your family over the past five years?

More than two thirds (68%) of Europeans say being environmentally-friendly is now more, or very important to them. The Europe-wide result reflects the sentiment of individual countries, all of which turned in broadly similar percentages, aside from Italy, where consumers appear to be the most concerned, with 73% claiming environmental concerns were more or very important to them.

When it comes to attitudes from different age groups, it's clear that younger shoppers are putting the environment higher up their agenda, with 80% of all 19-29 year-olds across Europe saying that being environmentally-friendly has become more important to them and their families.



| | ITALY | TURKEY | FRANCE | SPAIN | UK | GERMANY | POLAND |
|----------------------------------|-------|--------|--------|-------|-----|---------|--------|
| VERY MUCH MORE IMPORTANT | 47% | 43% | 39% | 39% | 35% | 31% | 31% |
| MORE IMPORTANT | 26% | 27% | 30% | 26% | 32% | 37% | 31% |
| NO CHANGE | 15% | 17% | 20% | 18% | 21% | 25% | 23% |
| NOT REALLY IMPORTANT | 10% | 10% | 9% | 14% | 10% | 6% | 12% |
| NOT AT ALL MORE IMPORTANT | 3% | 2% | 2% | 3% | 3% | 2% | 4% |

Please note that some figures in the report have been rounded up/down so may not add exactly to 100%.



Has the recent media attention about packaging ending up in the sea made you change the type of purchases you make?

There's no getting away from the intense publicity about the pollution of the world's oceans. Little surprise then that 74% of Europeans say the media focus on the issue has influenced them to change their purchasing habits. Here, more Spanish shoppers (82%) claim to be changing how they shop, compared to the other six European countries.

Media coverage on packaging waste has influenced the purchasing habits of

74%
of Europeans.

Which of the following have you changed in the last 12 months?

Recycling waste is top of the consumer agenda when it comes to putting words into action.

69% of all Europeans say they are recycling more waste. More consumers in the UK (78%), Italy (74%) and Turkey (74%) agree that they are recycling more waste, whereas in Germany the figure is 58% - probably because German households have recycled as a matter of course for some years. When it comes to the different age groups, recycling clearly becomes more important the older you get, with 79% of over 60s recycling more waste over the last year, compared to 62% of 19-29 year olds.

Just over half (52%) of all Europeans say they are seeking out products in environmentally-friendly packaging – rising to 55% of French shoppers and 56% of consumers in Turkey.

Recycling more of your waste



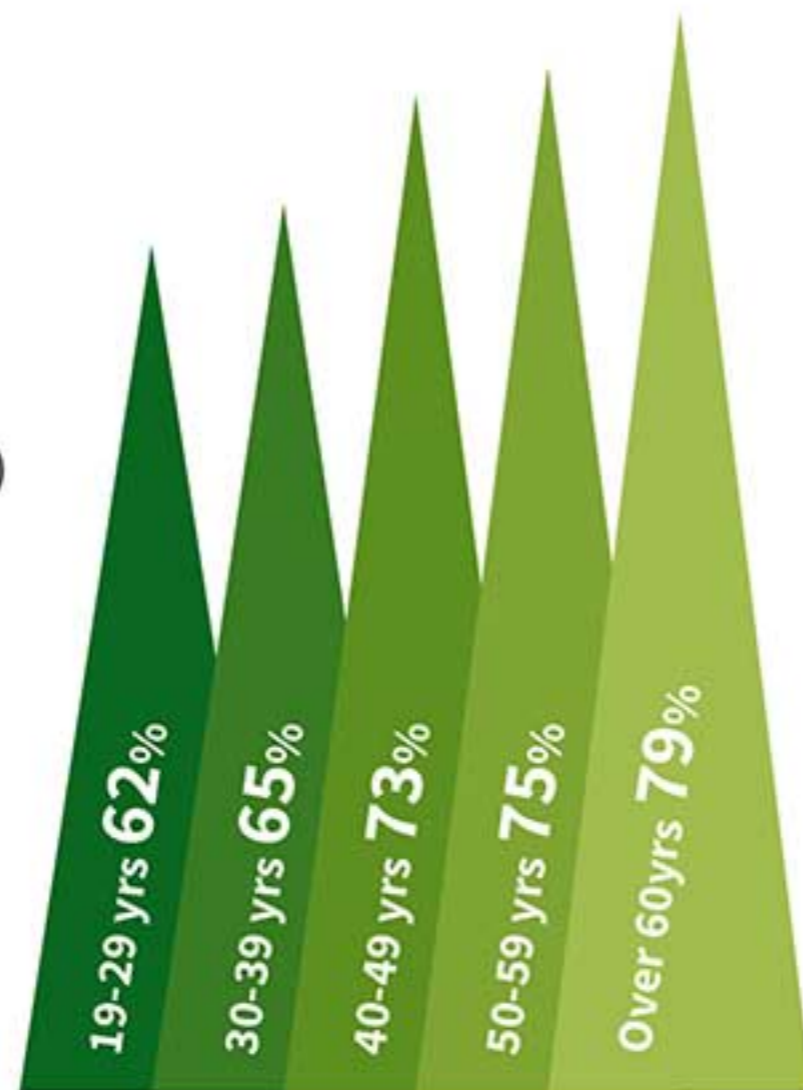
Purchasing more products in environmentally-friendly packaging



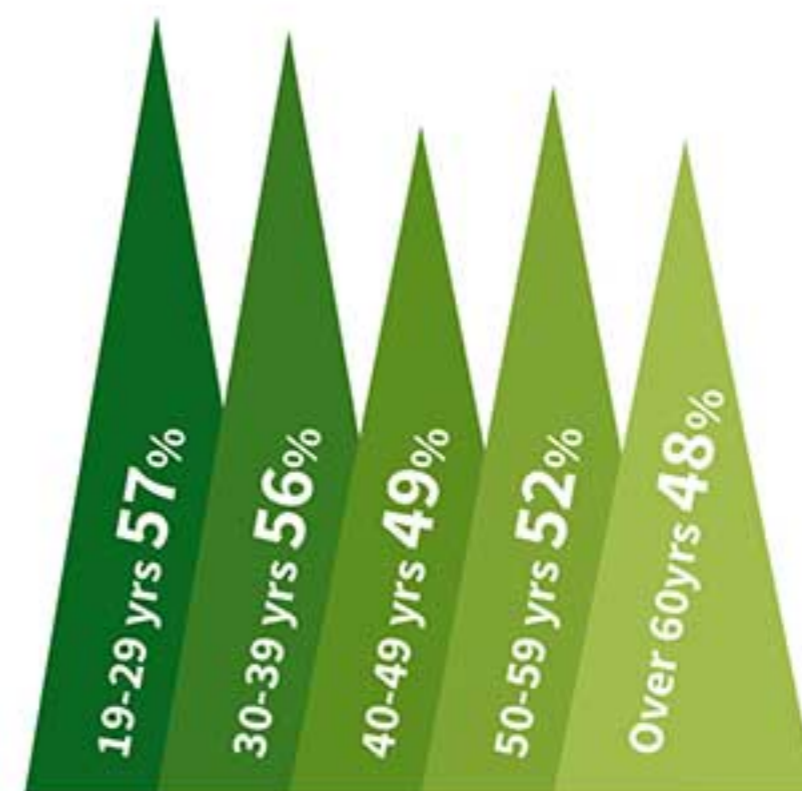
| | UK | ITALY | TURKEY | FRANCE | SPAIN | POLAND | GERMANY |
|---|-----|-------|--------|--------|-------|--------|---------|
| Recycling more of your waste | 78% | 74% | 74% | 70% | 67% | 66% | 58% |
| Purchasing more products in environmentally-friendly packaging | 55% | 49% | 56% | 55% | 51% | 53% | 52% |

KEY age group (all of Europe)

- ▲ 19-29 years old
- ▲ 30-39 years old
- ▲ 40-49 years old
- ▲ 50-59 years old
- ▲ Over 60 years old



Number of shoppers recycling more of their waste



Number of shoppers purchasing more products in environmentally-friendly packaging

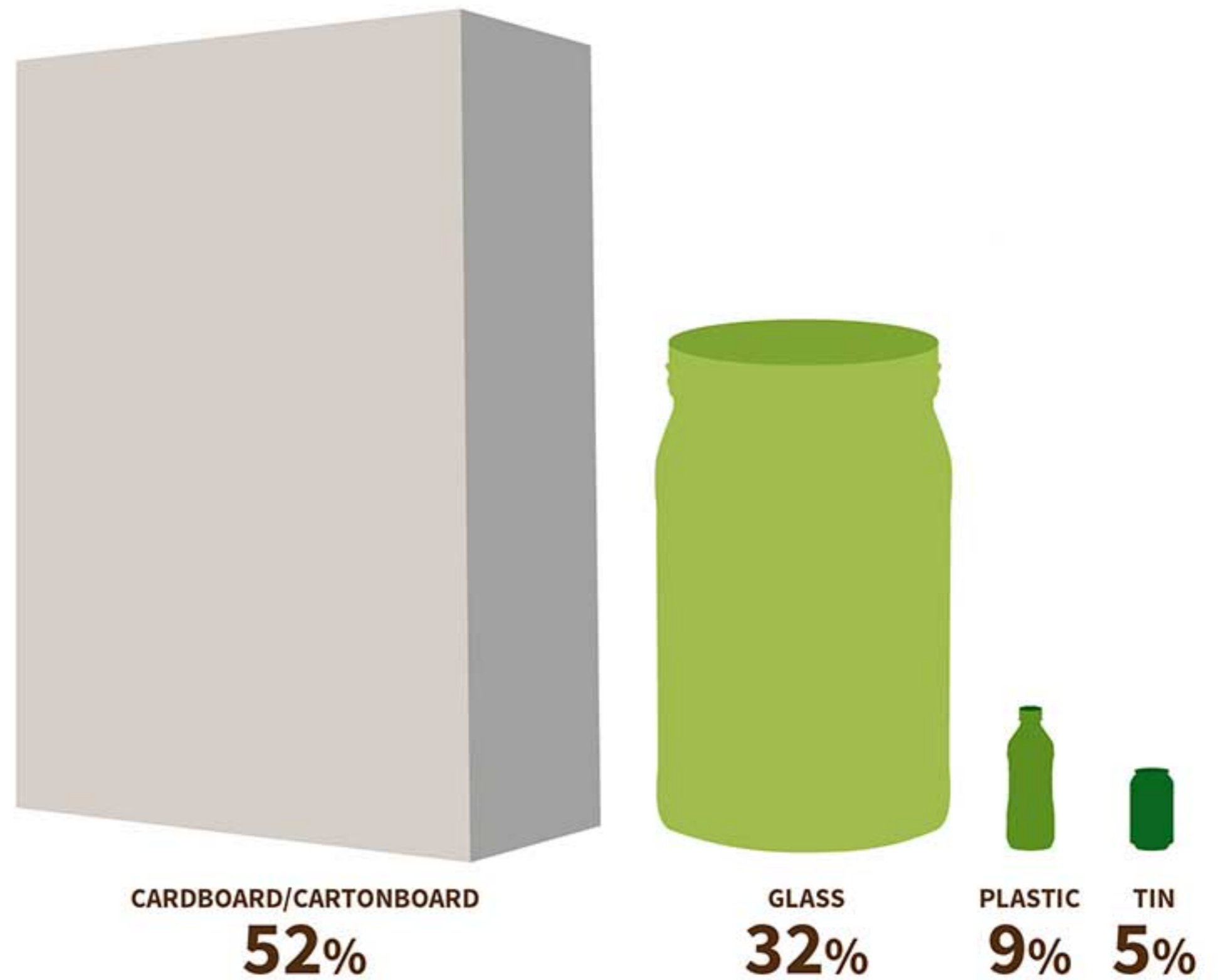
Shaping understanding

Consumers have a good working understanding of the different forms of packaging, but there is still work to be done in improving their knowledge

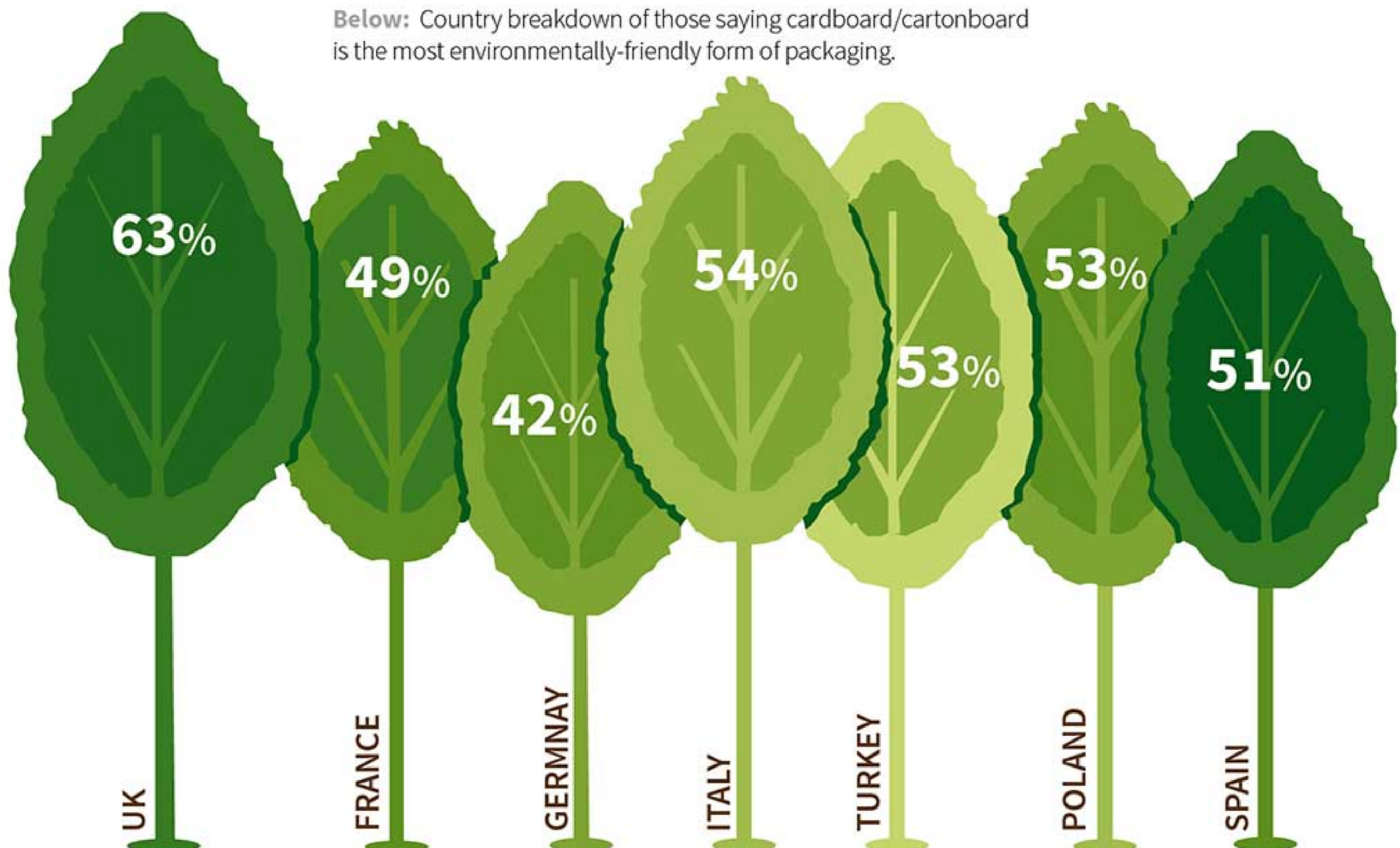
What would you say is the most environmentally-friendly form of packaging?

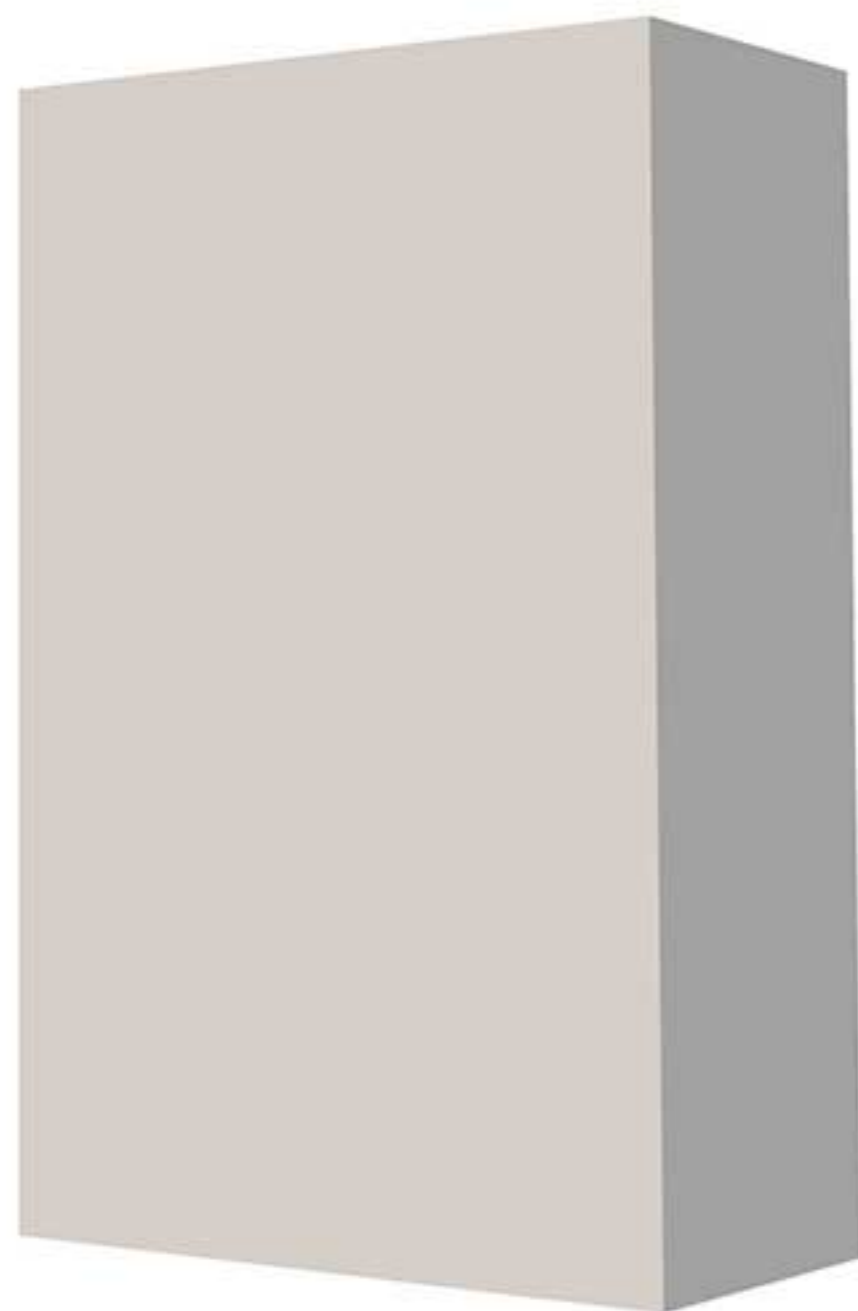
52% of all Europeans believe cartonboard/ cardboard is the most environmentally-friendly packaging – a result broadly echoed across each country, but especially in the UK where 63% of shoppers point to this material.

Our survey respondents named glass as the second most environmentally-friendly packaging – 32% Europe-wide, rising to 43% of Germans. Some 9% of Europeans believe plastic is the most environmentally-friendly form of packaging, whereas only 5% thought tins/cans to be the best.



Below: Country breakdown of those saying cardboard/cartonboard is the most environmentally-friendly form of packaging.





CARDBOARD/CARTONBOARD
45%



GLASS
32%



PLASTIC
15%



TIN
9%

What would you say is the most recyclable form of packaging?

When it comes to what consumers believe to be the most recyclable form of packaging, again cartonboard wins out. 45% of Europeans point to cartonboard/cardboard as the most recyclable material, with 32% selecting glass. Tins/Cans were felt to be the least recyclable, scoring slightly lower than plastic.

How important are the various packaging features?

The research reveals a heightened focus on sustainability and product safety when it comes to current and future packaging solutions. It comes as no surprise that protecting the product is the most highly ranked packaging feature – as it is the primary function of any packaging solution.

However, across Europe there is also a growing awareness of the importance of protecting the environment. 'Easy to recycle' was considered the second most important packaging feature in every country surveyed, with 63% of respondents ranking it as one of the top three attributes. It is followed by 'made of natural, renewable materials', which scored most highly among consumers in Germany.

A product's ecological impact is becoming an increasingly important factor in consumers' purchasing decisions, packaging that is both recyclable and made from a natural, renewable resource scored significantly higher than 'easy to open' and 'resealable', suggesting that the environmental features are more important than functional benefits.



Shoppers taking action

Retailers and brand owners should note that shoppers care very much about how products are packaged and say they are willing to shun items they believe are not packaged using sustainable materials.

When shopping, does the environmental impact of a product's packaging affect your purchasing decisions?

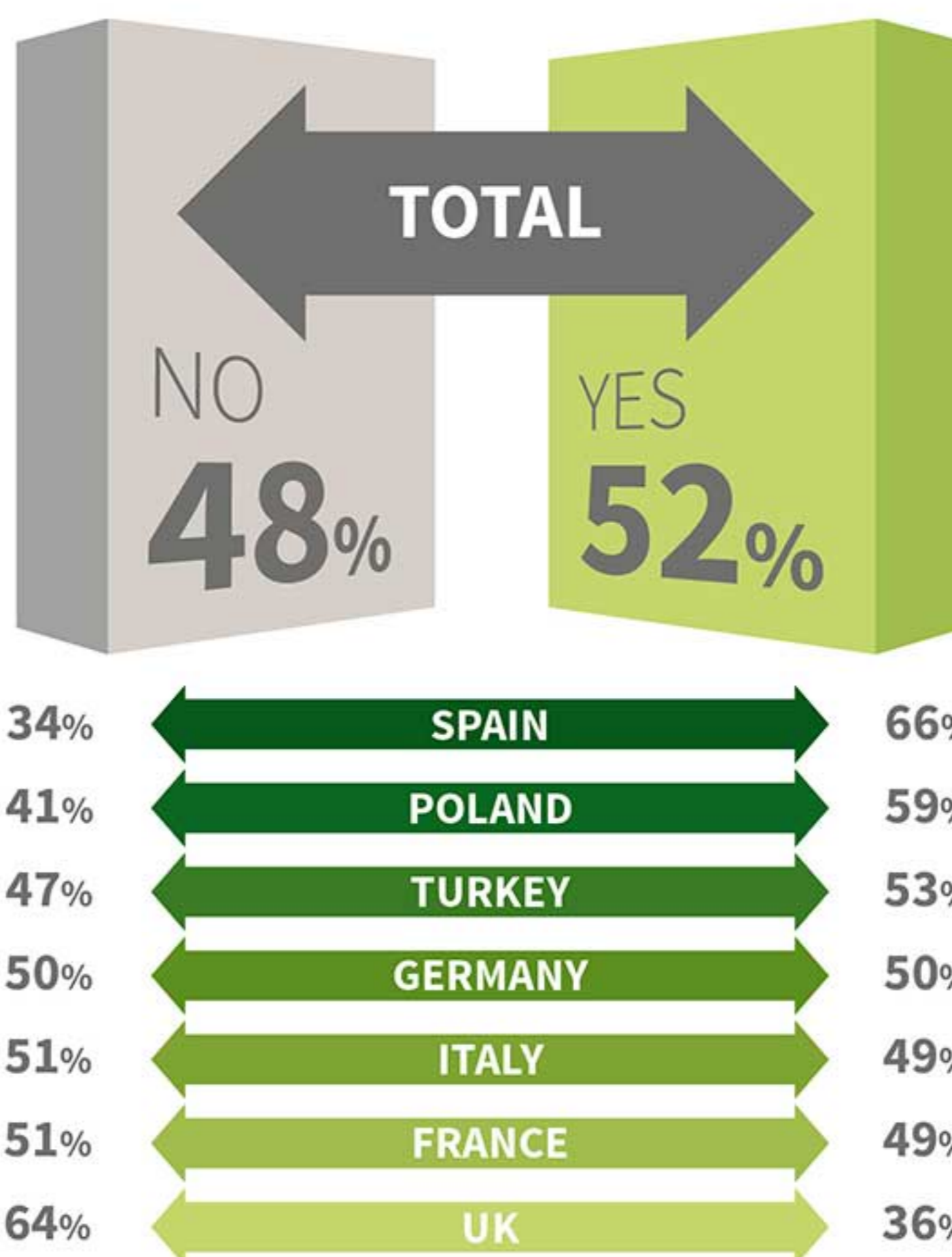
The answers to this question echo the responses given to the very first question. 75% of consumers from across Europe say the environmental impact of a product's packaging affects their purchasing decision. This percentage rises to 77% in Germany and Poland, and to 81% in Spain.



Have you ever switched brands or products because of concerns about the packaging used?

Spanish shoppers are the most militant when it comes to packaging choice, with 66% saying they have switched a brand or product because of environmental concerns about how it is packed. This is in contrast to UK shoppers, just 36% of whom say they've changed purchases for similar reasons. Across all seven countries, more than half (52%) of consumers say that environmental concerns have prompted a switch.

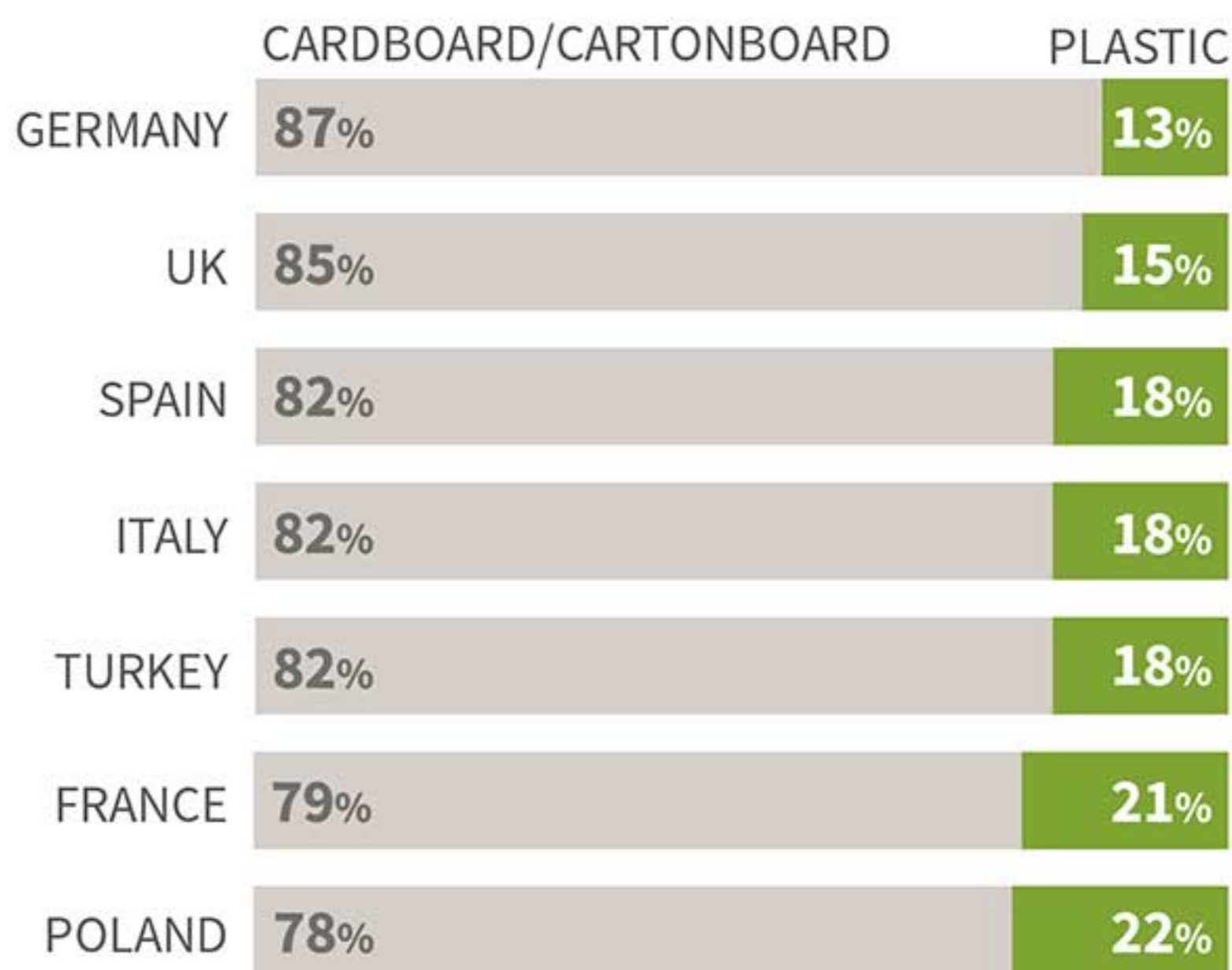
Responses to this question show a disparity between the ages when it comes to positive action. In fact, 62% of 19-29-year-olds say they have switched brands because of packaging concerns, compared to only 35% of over 60s.



Drilling down to the reasons that shoppers chose to switch brand or products, 52% of all respondents said it is because packaging is non-recyclable, 45% say because of too much additional/unnecessary packaging

If the same product was packaged in two different forms of packaging – one in plastic and one in cardboard, which one would you choose?

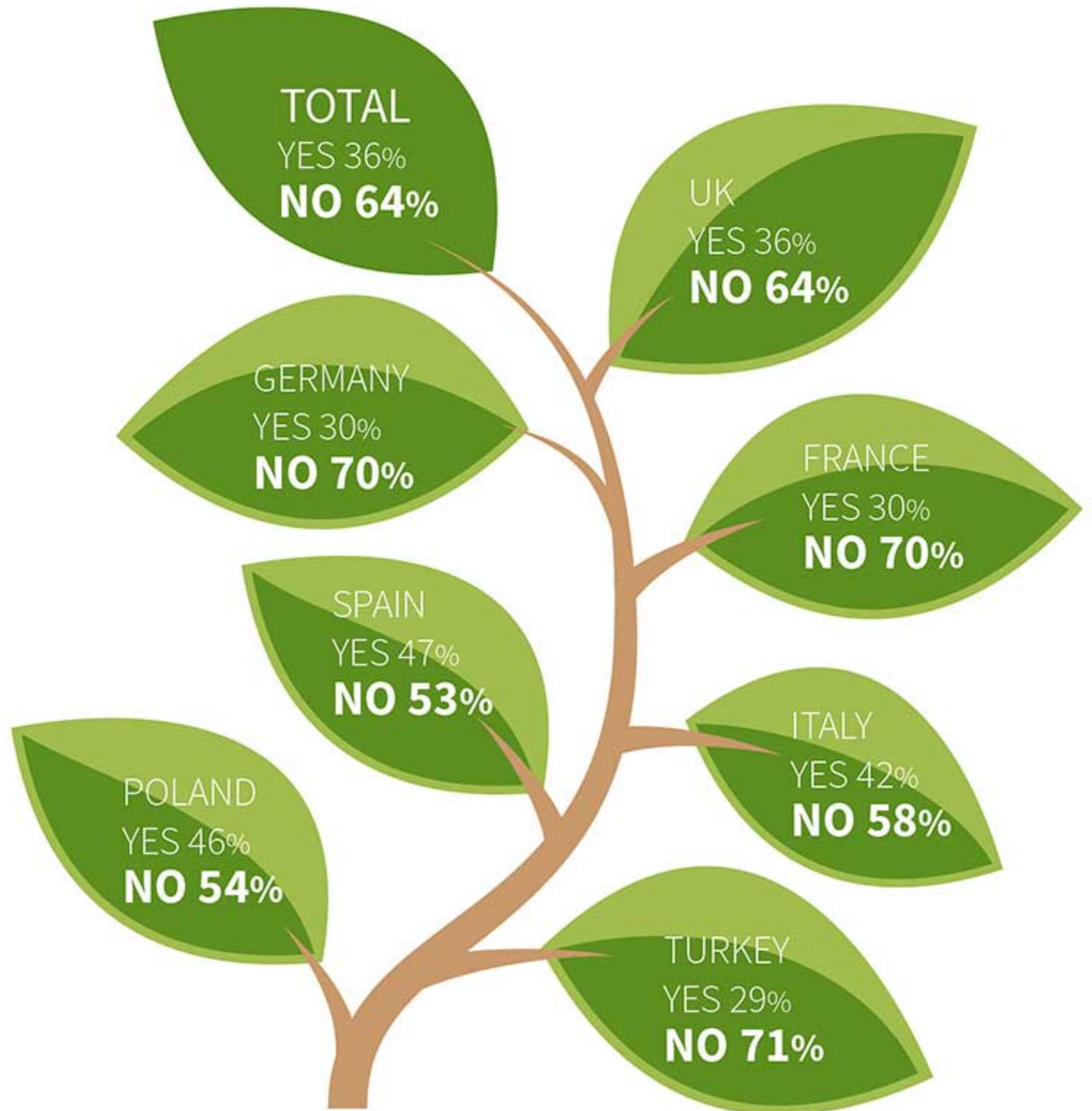
Four out of five consumers (81%) said that, given the choice, they would choose cartonboard/cardboard packaging over plastic. Shoppers in Germany (87%) and the UK (85%) are the most likely to choose cardboard over plastic, but even in countries where the percentages are not quite as high, cardboard/cartonboard still comes out clearly on top.



In your opinion, are retailers and brands doing enough to introduce more environmentally-friendly forms of packaging?

The answers here throw a spotlight on the perceived environmental responsibility that consumers clearly expect from brands and retailers. Only a third (36%) of Europeans believe brands and retailers are doing enough to introduce more sustainable packaging, dropping to under 30% in the UK and Turkey. Even in countries where consumer sentiment towards the efforts of the brands and retailers is more positive, such as Spain (47%) and Poland (46%), not one country saw results top 50%.

It's particularly the older consumers that believe most strongly that brands and retailers are not doing enough with 82% of over 60s saying they should introduce more environmentally-friendly forms of packaging.



Would you choose to shop at a supermarket or shop that was proactively encouraging suppliers to adopt more environmentally-friendly forms of packaging?

Retailers with an environmentally-friendly focus have everything to play for, according to our survey results.

A resounding 91% of European consumers say they'd choose to spend their money with a supermarket or shop that was proactively encouraging suppliers to adopt more environmentally-friendly forms of packaging and policies. Italian shoppers are the most enthusiastic, with 96% taking a positive view.



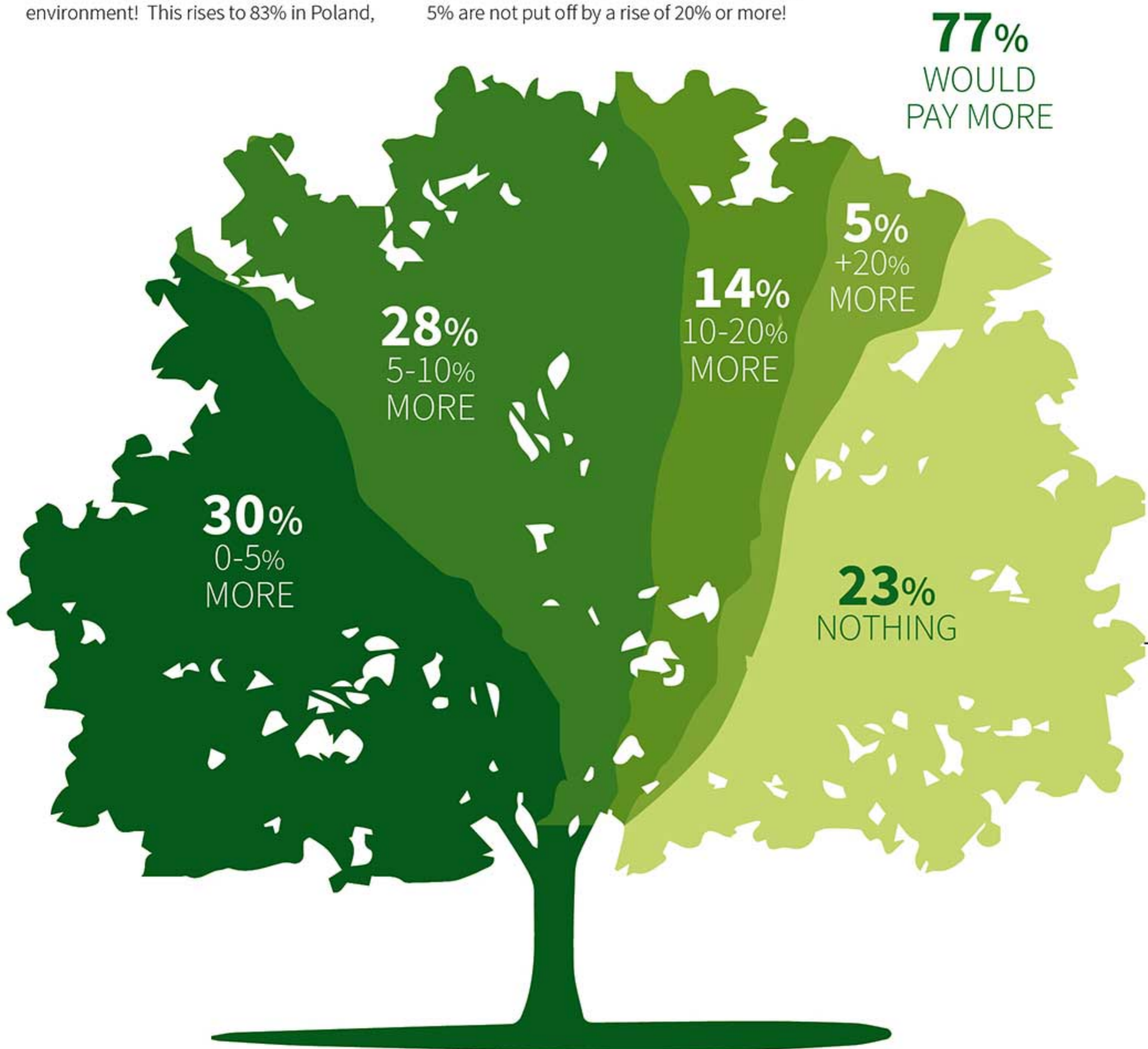
Money talks

A significant number of respondents claim to be open to paying more for environmentally-friendly packaging and a majority even favour a tax to force retailers and brands to take action. They're also strongly in favour of governments intervening to provide more information on the environmental credentials of a brand or product's packaging.

How much extra would you pay for a product if it meant that the packaging of your desired product had less impact on the environment?

An incredible 77% of all respondents, that's well over 5,000 people in our 7,000-strong survey, say they are willing to pay extra for packaging that has less impact on the environment! This rises to 83% in Poland,

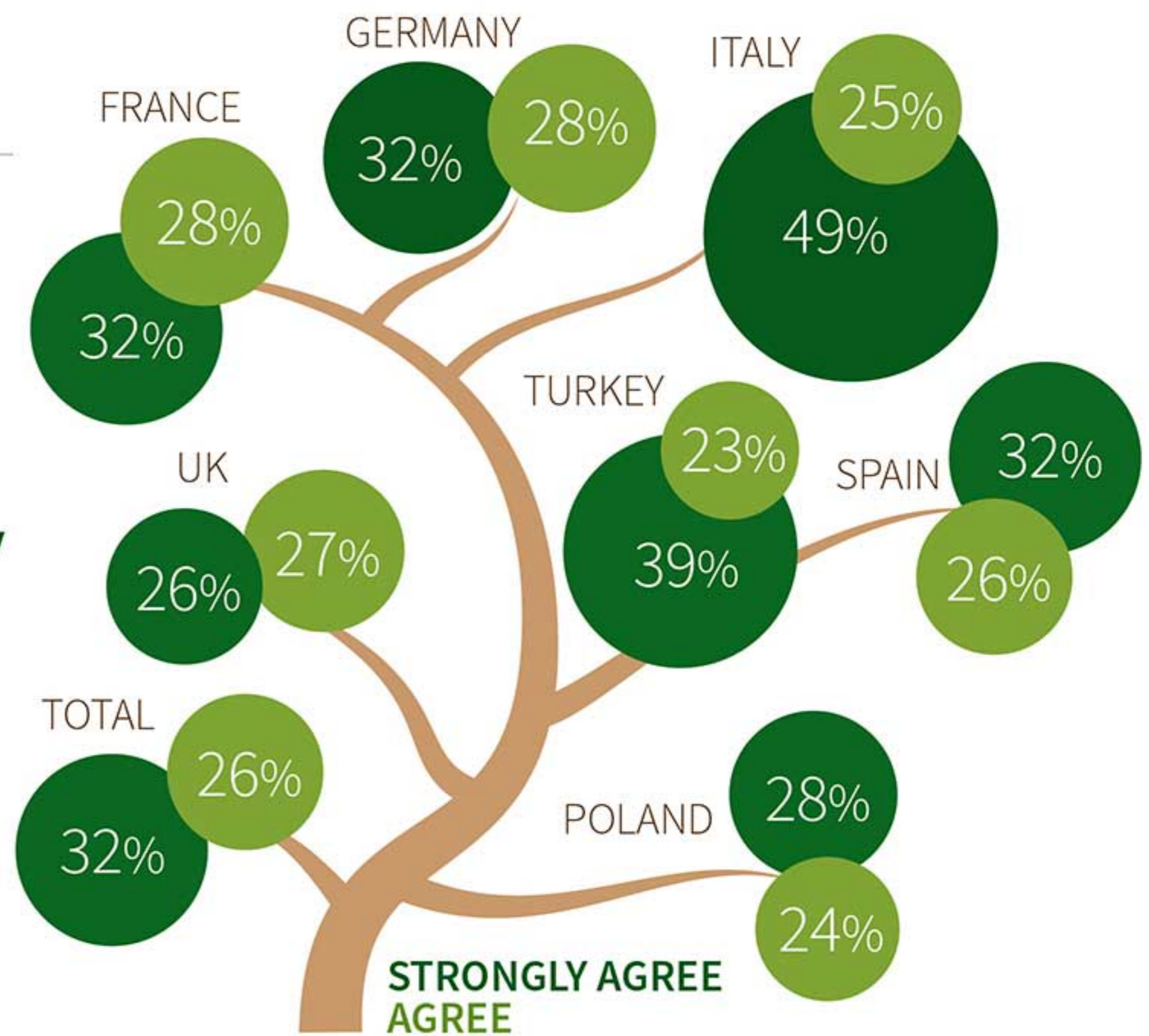
82% in Spain and 81% in Italy. Some claim that they are prepared to pay significantly more: 20% of all respondents believe an increase of in excess of 10% is acceptable, and 5% are not put off by a rise of 20% or more!



To what extent do you agree with the following statement: A tax should be introduced to force brands and retailers to adopt more environmentally-friendly forms of packaging?

There is significant appetite for a 'tax' or 'levy' on brands and retailers to force them to adopt more sustainable packaging approaches.

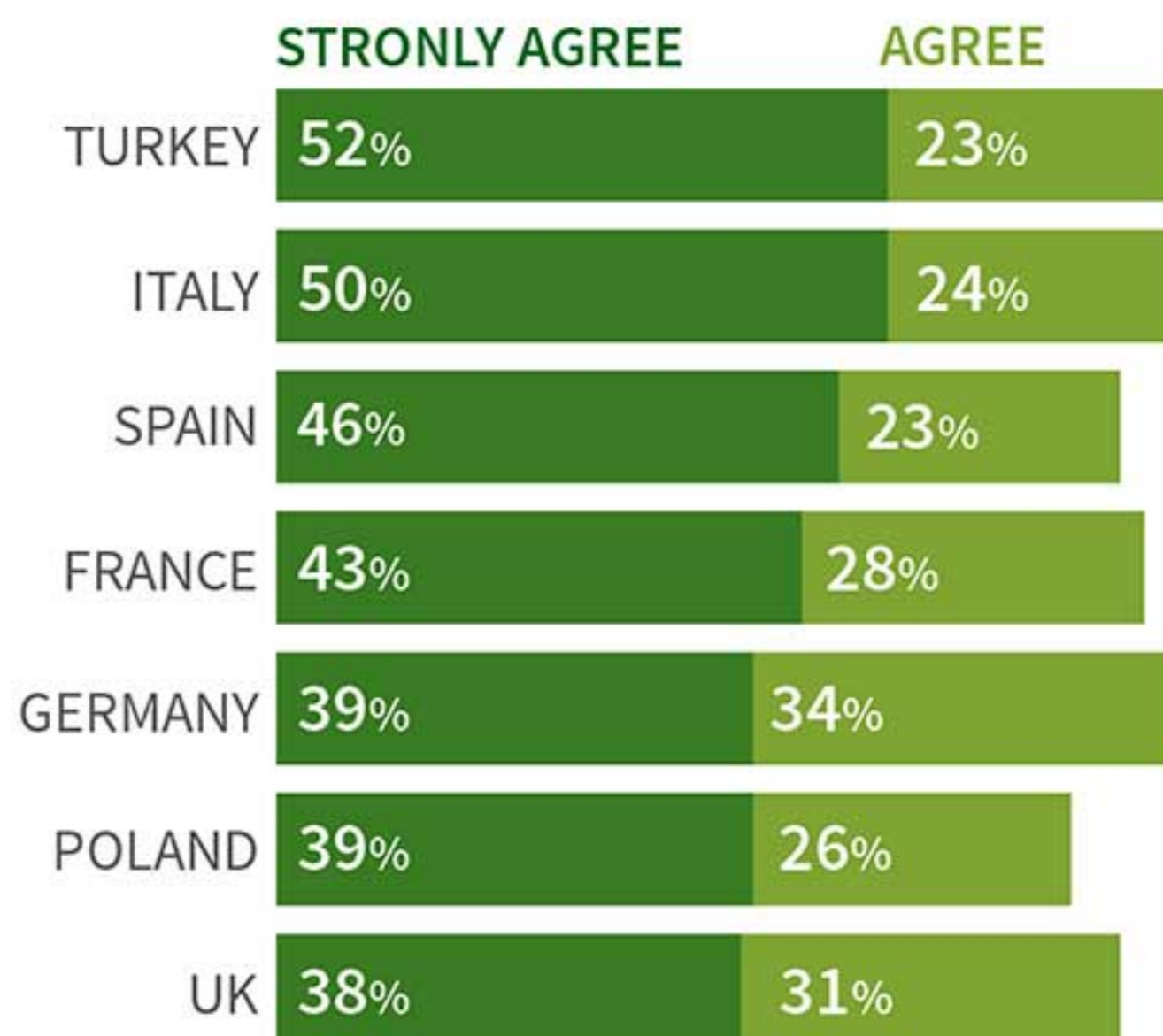
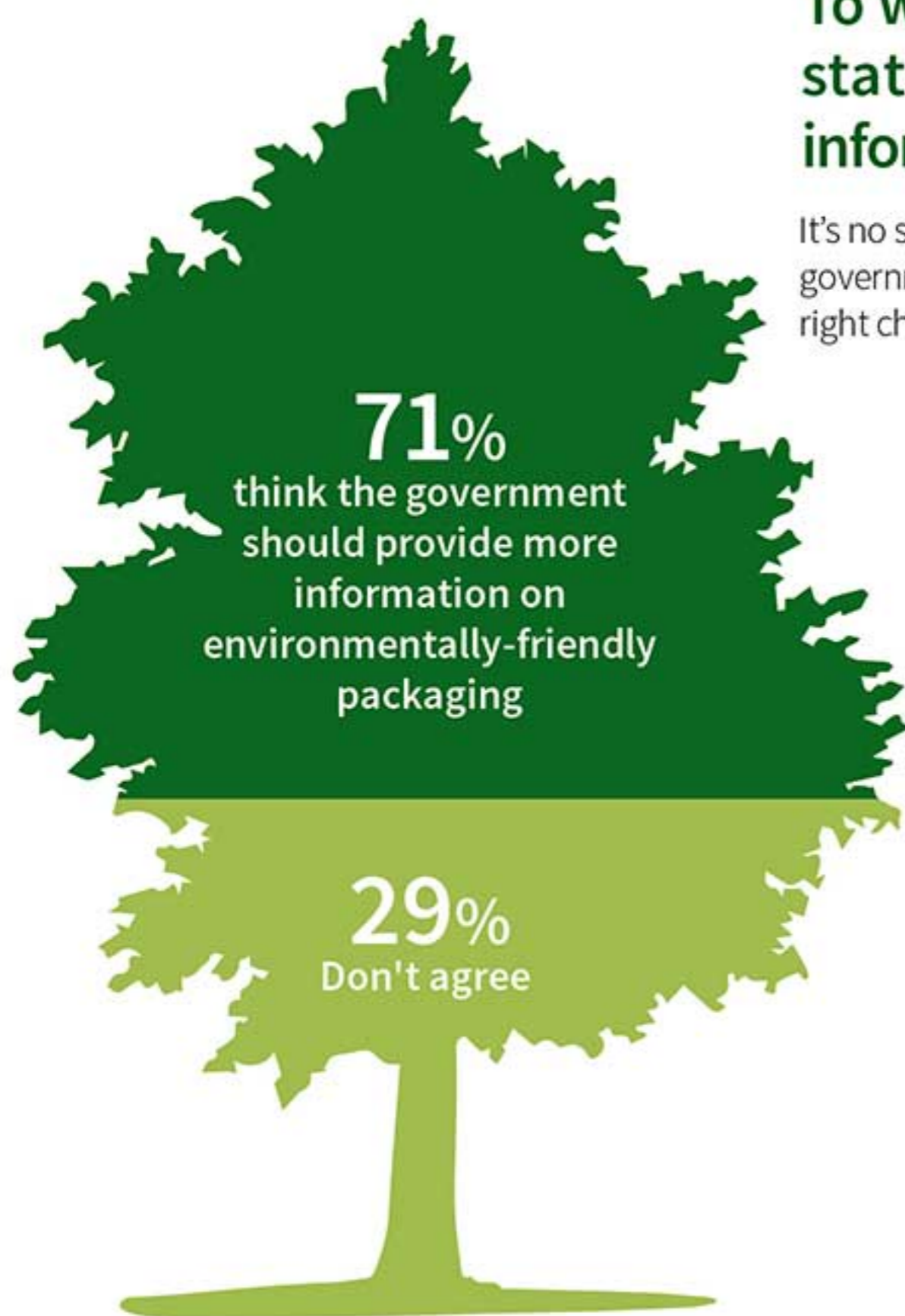
In fact, 58% of all survey respondents agree or strongly agree with this statement, with 28% not sure, while in Italy 74% agree or strongly agree. Overall only 17% of consumers were against the principle, with no country having more than 20% against the idea.



To what extent do you agree with the following statement: The government should provide more information on environmentally-friendly packaging.

It's no surprise that consumers want government guidance to help them make the right choices. 71% of consumers in the

surveyed countries strongly agree or agree with the statement. In Italy and Turkey that percentage rises to 74% and 75% respectively.





Would you like the government or brands to introduce information on-pack to show how environmentally-friendly the packaging format is?

Survey respondents are crying out for greater guidance on the packaging they buy. A resounding 90% of shoppers in all countries surveyed say they'd like information about the environmentally-friendliness of packaging. A very strong message indeed!

Key findings

- 68% of European consumers admit that making environmentally-friendly decisions has become more important to them over the past five years.
- Recycling is on the rise with 69% of consumers recycling more waste in the last 12 months.
- Three quarters (75%) admit that the environmental impact of a product's packaging affects their purchasing decision.
- Packaging in the media has impacted the purchasing decisions of three quarters of consumers.
- More than half of all consumers identify cardboard/ cartonboard as the most environmental and recyclable form of packaging.
- 64% of consumers think retailers and brands are not doing enough to introduce environmentally-friendly packaging.
- 91% of all consumers would shop at a supermarket or retailer that proactively encouraged environmentally packaging from its suppliers.
- 77% of consumers would pay a premium for more environmentally-friendly packaging.
- More than half of all consumers have switched brands because of packaging - non-recyclable and unnecessary packaging are the most common reasons for change.
- Over half of all consumers support a tax to force brands and retailers to adopt more environmentally friendly packaging – only 17% disagreed.
- 90% of consumers want on-pack labelling to demonstrate environmentally-friendly packaging, while 71% want guidance from government.



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Pro Carton is the association of European
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