

The Second **European Consumer Packaging Perceptions Study**

THE SECOND EUROPEAN PACKAGING PERCEPTIONS STUDY

**An independent assessment
of the importance of packaging
sustainability on consumer
purchasing decisions.**



PRO CARTON
PACKAGING FOR
A BETTER WORLD



**perspectus
global**

Outline of the study

The study, conducted independently by Perspectus Global and commissioned by Pro Carton, surveyed 7,051 adults across eleven countries - **Austria, France, Germany, Italy, Poland, Spain, Turkey, Belgium/Netherlands/Luxembourg (Benelux) and the United Kingdom.** The research was designed to gauge consumers' views on different packaging and environmental issues and how this may have been affected by the COVID-19 pandemic.

Due to roundings, some of the charts do not add exactly to 100.

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Introduction



Tony Hitchin
General Manager
Pro Carton

"We are pleased to present the latest findings of our widest reaching consumer survey, conducted independently with over 7,000 people across eleven countries.

Even with continuing concerns surrounding COVID-19, environmental issues remain very high on everyone's agenda, which you can see throughout the report.

Some of the questions are repeated from a similar study conducted in mid-2018, and the strength of feeling largely hasn't changed.

It is this environmental consciousness that is driving many brand owners to adopt cartonboard packaging (as it's renewable, recyclable and biodegradable) over less sustainable alternatives. However, there's still a long way to go to get to a truly circular economy, as highlighted by a study from Material Economics that showed that 25% of plastic packaging currently in use could be replaced by paper and board today.

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 last year has made people modify their lifestyles and rethink some of their views. Clearly, their attitude towards the needs of the environment has, if anything, hardened. The coronavirus pandemic has made people reconsider what types of packaging they want their food and other goods packaged in and it is encouraging that brands and retailers are making changes.

The cartonboard market, as more manufacturers choose it as their preferred packaging material, is in solid growth despite the hit that the industry has taken from the weakening of the fast food and luxury sectors. Clearly, more than ever, consumers want products and packaging that do not deplete the Earth's resources, and doesn't harm the environment at the end of life.

I am confident that cartonboard and folding cartons will become an even more widely used packaging medium in the future and that Pro Carton can play an important role in communicating the benefits of cartonboard and paper-based packaging in general. The insights represented in this report provide clear guidelines for manufacturers and, indeed, governments about consumers' attitudes. Listening to them and acting upon them can only make a change today for a better tomorrow."

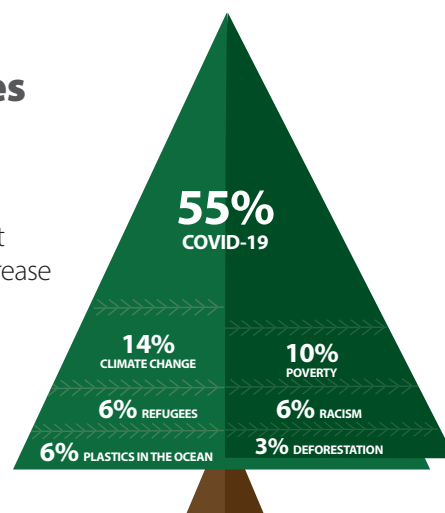
Challenging times

There is no doubt that the coronavirus outbreak is top of people's minds, which has led to a significant change in the way we live in terms of work, lifestyle and the way we shop.

What do you think are the biggest issues facing us today?

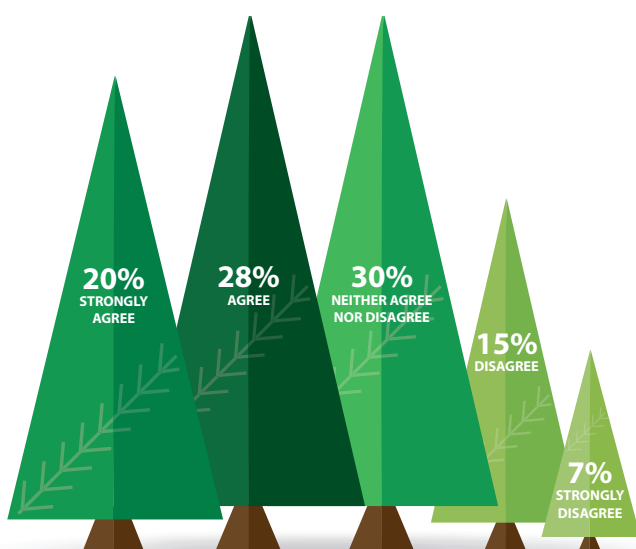
Not surprisingly, more than half (55%) of Europeans said that the coronavirus is the biggest issue facing us today. This was consistent across each of the individual countries and age ranges, with no increase in the number of older people ranking this as the number one concern, perhaps surprising given this group's greater vulnerability.

Climate change was rated the second most important ahead of other issues including poverty, racism and refugees. Indeed, when asked for a second choice after the coronavirus, climate change was clearly the most important issue.



Has COVID-19 made us more concerned about the environment?

Almost half of European consumers surveyed (**48%**) strongly agreed or agreed that COVID-19 has made us **more** concerned about the environment.



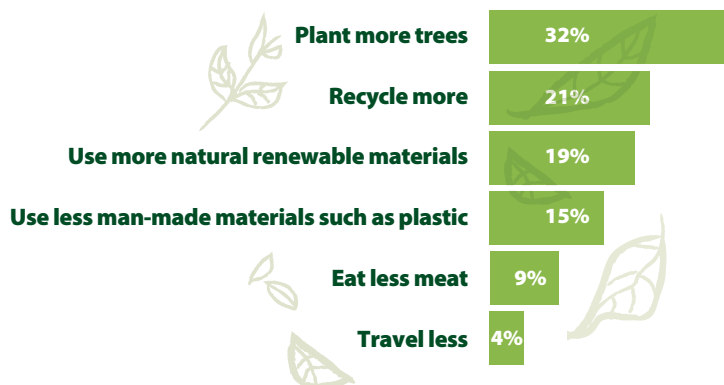
48%
Agree
only 22%
Disagree

While coronavirus has, unsurprisingly, been the key focus for 2020, its impact on all aspects of human consumption has not gone unnoticed.

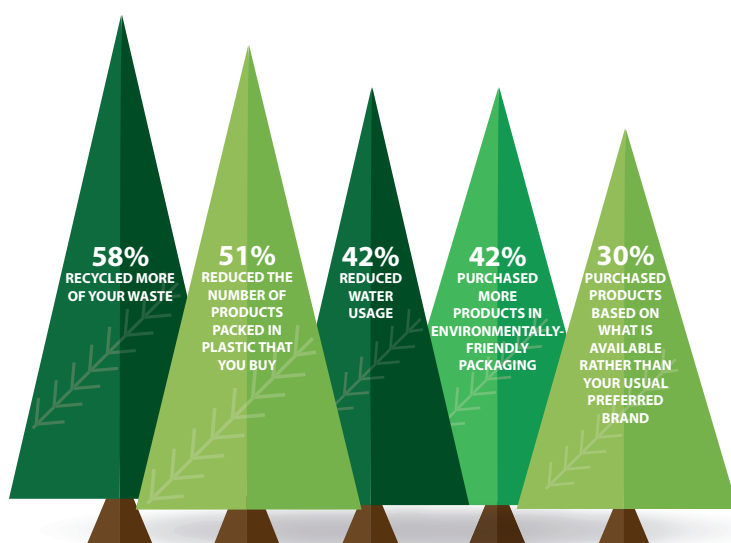
Eco-friendly habits

In terms of what we need to do to stop climate change, more people said that we should plant more trees than any other response (32% ranked it highest). Next were “recycle more” and “use more natural resources”. Interestingly, people aren’t so keen on actions that might affect their own enjoyment as only 4% rated “travel less” as a top priority.

What do you think are the best ways of stopping climate change?

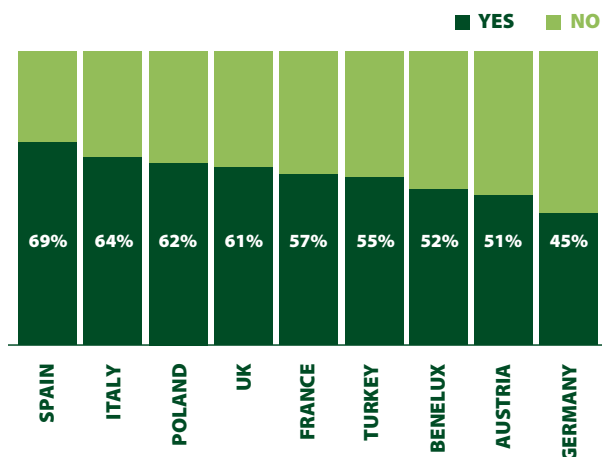


Which of the following have you done over the past 12 months?



Due to the problems created by the pandemic, one might have expected that pragmatism would have taken over from more ideological beliefs. Our survey suggests this not to be true. More than half (58%) of those surveyed said they were now recycling more than they were a year ago and over half had reduced the number of products packed in plastic that they buy. The increase in recycling is particularly notable in Spain (69%) and Italy (64%) although, of course, if you are already recycling everything you wouldn't be able to increase the amount, which may explain why Germany was bottom of this poll with 45% of people saying they are recycling more than they used to.

Are you recycling more now than a year ago?



When shopping, the environmental impact of a product's packaging affects my purchasing decisions

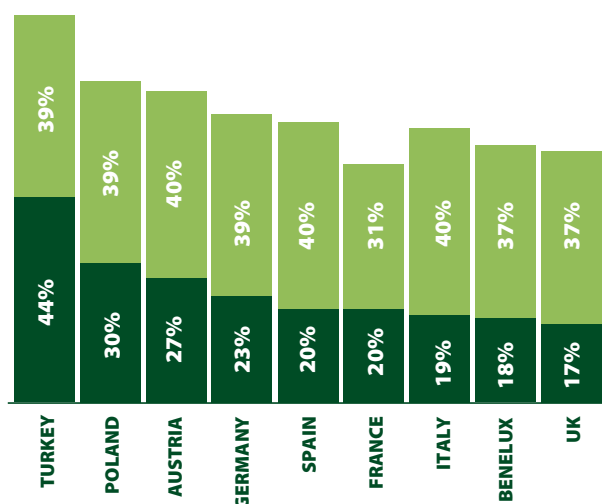
Shopping habits are changing too. More than 6 out of every 10 consumers admit that the environmental impact of packaging affects their purchasing decisions. Indeed, only 12% said that their purchasing behaviour was not affected.

61%
Agree
only **12%**
Disagree



There were some notable differences by country and age with consumers in Turkey (**83%**) and Poland (**69%**) being most influenced by the environmental impact of the packaging. Similarly, younger adults tended to be more affected than older adults.

TOTAL 83% 69% 67% 62% 60% 51% 59% 55% 54%



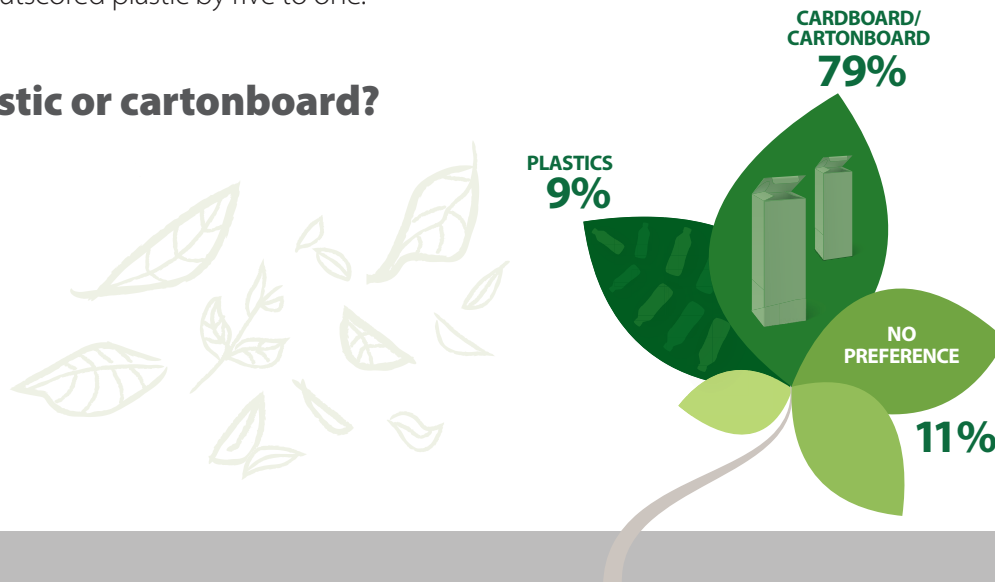
Percentage agreeing that the environmental impact of the packaging affects their purchasing decisions

■ **STRONGLY AGREE** ■ **AGREE**

Environmentally friendly packaging

When asked for a preference if the same product was available in plastic or cartonboard/cardboard, four out of five opted for the paper-based format. Indeed, less than one in ten would prefer to go for the product packed in plastic. Older consumers were slightly more likely than the younger generation to have a preference for cartonboard but even in the under 34 age group cartonboard still outscored plastic by five to one.

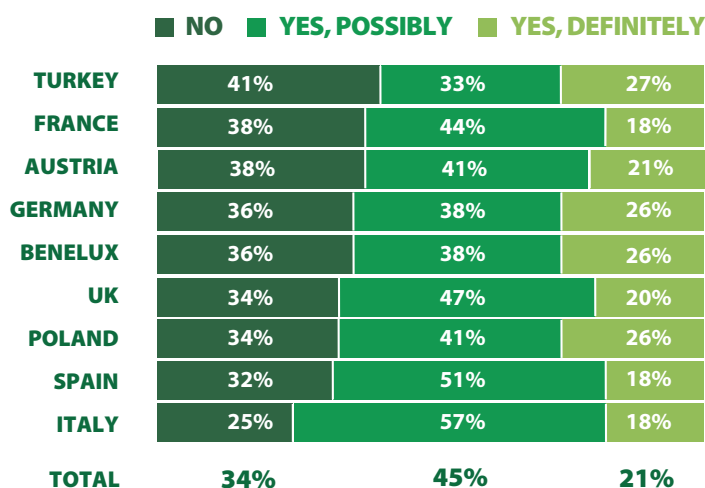
Plastic or cartonboard?



Proactive Retailers will Win

When asked if consumers would choose to shop at a supermarket or retailer that was proactively encouraging suppliers to adopt more environmentally friendly forms of packaging, an overwhelming **93%** of respondents said that they would.

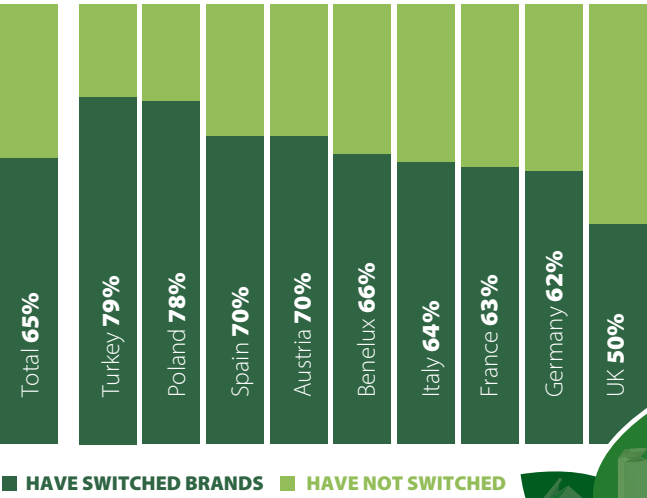
Are retailers and brands doing enough to introduce more environmentally friendly forms of packaging?



According to the United Nations 'Goodlife Goals', everybody from the government to the private sector and civil society needs to do their bit to reach Sustainable Development Goals for a better future.

Only one third of consumers felt that retailers and brands are **not** doing enough to introduce more environmentally friendly packaging. It is encouraging that the good work being done by these sectors is being appreciated by a large proportion of the general public.

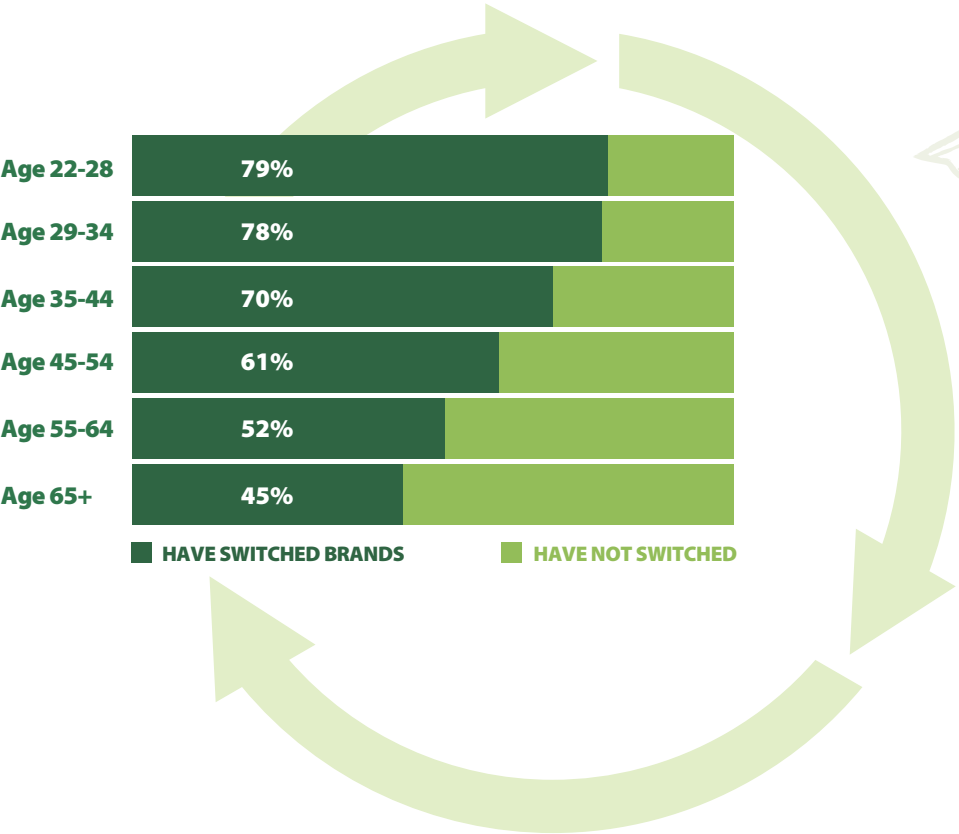
Have you switched brands due to concerns about packaging?



Almost two thirds of respondents claim to have changed the products they buy due to concerns about the packaging.



It is particularly notable that younger consumers are far more likely to switch brands due to concerns about the packaging.



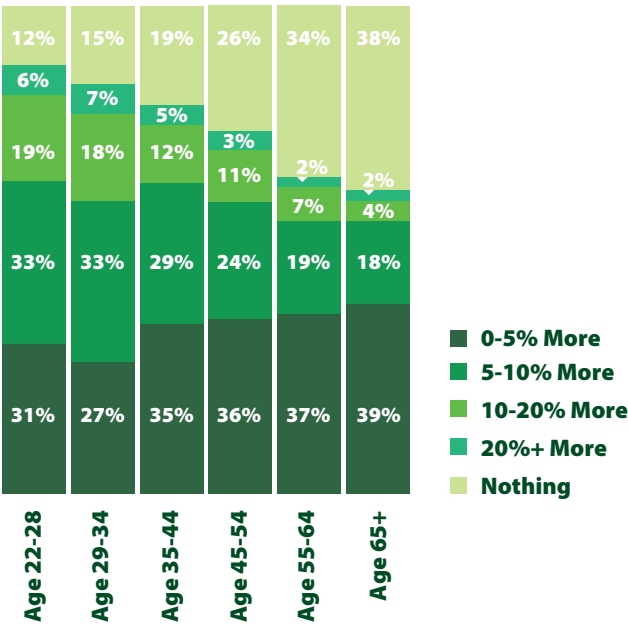
How much extra would you pay for a product if it meant that the packaging of your desired product had less impact on the environment?



Over three quarters of all consumers would be prepared to pay more for more environmentally friendly packaging.

Despite typically having lower incomes and a tougher economic outlook, **88%** of younger adults are prepared to pay more when it comes to buying products which are in packaging that is less environmentally damaging.

The survey found a willingness to pay more decreases with age. Although nearly two-thirds of the over 65 age group said that they will pay more, they are only willing to pay a smaller premium than the younger age groups.



Pressure on Companies and Government

The United Nations urged governments to declare “a state of climate emergency” in December 2020 during a virtual Climate Ambition Summit of 75 world leaders. At the same summit, 70 of those countries gave more details of plans to reduce greenhouse gas emissions in line with the Paris Agreement. So, how do consumers view the actions of governments and brand owners?

To what extent should the government and companies/brands do more to help the environment?

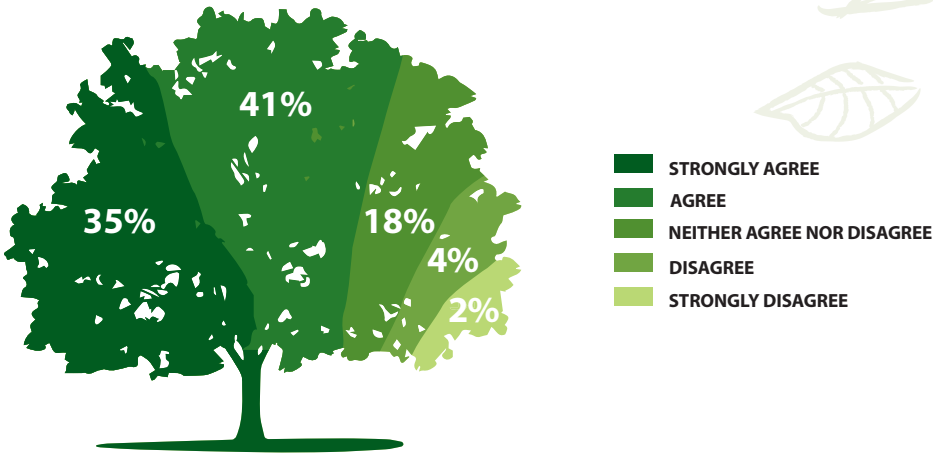
It was almost unanimously agreed (96%) that governments and brands should do more to help the environment.



	■ YES, A LOT MORE	■ YES, A BIT MORE	■ NO
COMPANIES/BRANDS	71%	25%	4%
GOVERNMENTS	73%	23%	4%

An overwhelming majority (76%) of Europeans strongly agreed/agreed that they would like the government to provide more information on environmentally friendly packaging.

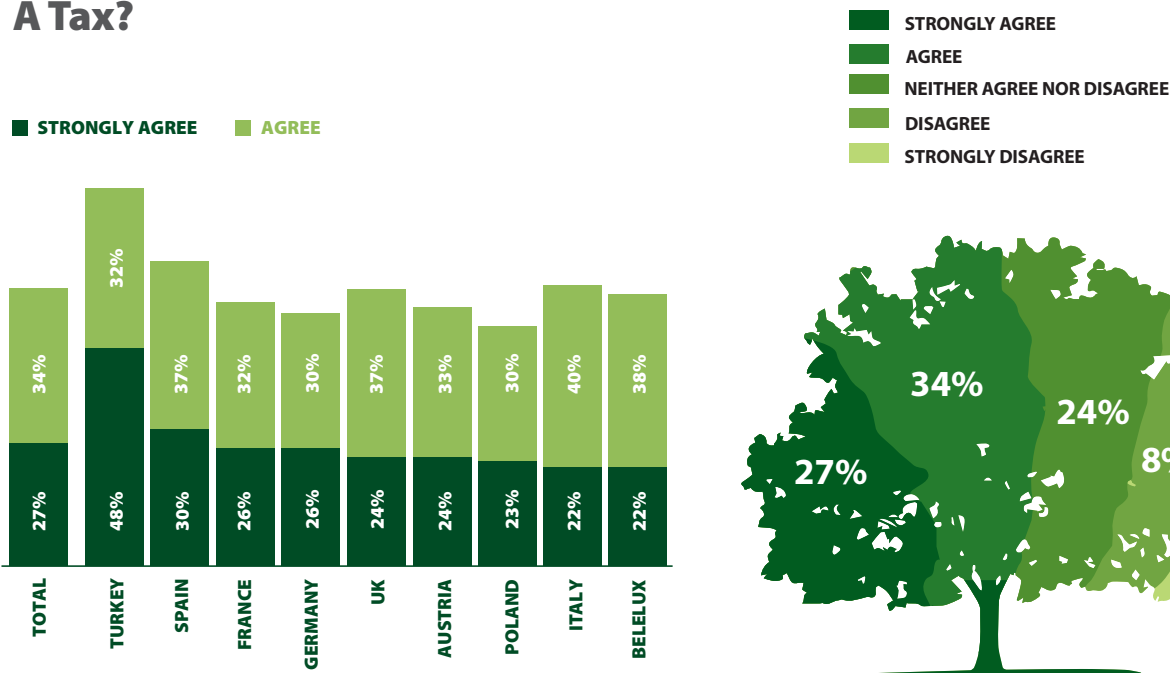
More information?



Should the Government provide more information on environmentally friendly packaging or a tax to force brands to use environmentally friendly packaging?

Additionally, **61%** also agree or strongly agree that a tax should be introduced to force brands and retailers to adopt more environmentally friendly forms of packaging. Turkish citizens were most in favour of this legislation being introduced.

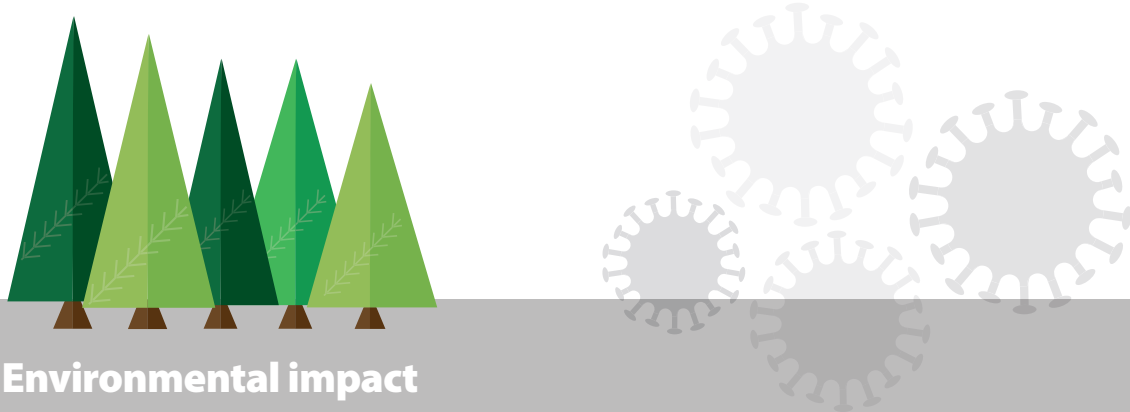
A Tax?



Comparison with 2018

In 2018 Pro Carton conducted a similar survey amongst 7,000 consumers across seven European countries. Some key questions were revisited in this study, to analyse changes in attitudes over time and, in particular, the affect that the COVID-19 pandemic might have had.

Overall, the results were largely in line with the findings in 2018. It should be borne in mind that, as reported earlier, almost half of those surveyed said that COVID-19 had actually made them more concerned about the environment with only 22% saying that the pandemic had made them less concerned.



Environmental impact

More than half of consumers, both in 2020 and in 2018, said the environmental impact of a product's packaging influenced their purchasing decisions.

When asked about a preference between plastic and cartonboard packaging, the numbers were very similar with **79%** of people choosing cartonboard in this study, whereas it was **81%** in 2018.

Recyclability

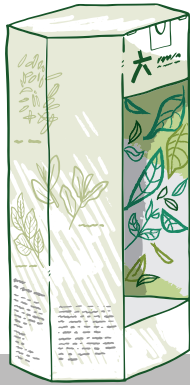
Recycling waste was top of the agenda in 2018, with 69% of all Europeans saying that they were recycling more waste. This percentage increased with age. The same is true in 2020, although to a slightly lesser extent with 58% claiming they are recycling more. This may be because the question asked if consumers were recycling more and many consumers are likely to be recycling everything they can already – and are therefore unable to increase this activity without additional facilities or infrastructure.



Are retailers/brands doing enough?

In 2018, 91% of European consumers said they'd choose to spend their money with a supermarket that was encouraging suppliers to adopt more environmentally friendly forms of packaging.

The same applies this time - 93% agreed they would choose to shop at a supermarket or retailer that proactively encouraged suppliers to adopt more environmentally friendly forms of packaging.



Money talks

More than three quarters of the people surveyed in 2018 (**77%**) said they were willing to pay extra for a product whose packaging had less impact on the environment. At the time this seemed a higher figure than might have been expected. It was interesting, therefore, that the latest study threw up exactly the same percentage! Once again, **77%** of consumers stated they would be prepared to pay more for a product if it was in more environmentally friendly packaging.

There is also still a significant appetite for a tax or levy on brands and retailers to force them to adopt more sustainable packaging approaches, with 61% of all survey respondents agreeing/strongly agreeing with this statement compared to 58% previously.

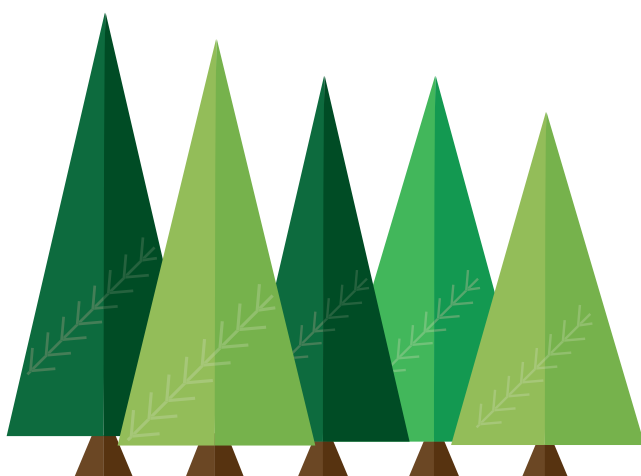
An overwhelming amount of people surveyed (75%) agreed the government should provide more information on environmentally friendly packaging. The figure is similar to two years ago when 71% strongly agreed/agreed with this statement.

Overall, it is clear that attitudes to packaging and the environment have not changed significantly in the two and a half years between the surveys and that COVID-19 has not lessened the importance of needing to protect our planet and the role that sustainable packaging needs to play.



Key Findings

- More than half of Europeans said that the coronavirus is the biggest issue facing us today. Climate change was rated the second most important issue.
- **Almost half of European consumers surveyed strongly agreed or agreed that COVID-19 has made us more concerned about the environment.**
- Six out of 10 Europeans agree that the environmental impact of a product's packaging affects their purchasing decisions and has influenced what they buy.
- **People felt that planting more trees was the most important action to arrest climate change.**



- When asked for a preference, if the same product was packed in plastic or cartonboard/ cardboard, four out of five opt for the paper-based format.
- **Most consumers felt that retailers and brands are doing enough to introduce more environmentally friendly packaging.**
- Almost two thirds of respondents claim to have changed the products they buy due to concerns about the packaging.
- **Over three quarters of all consumers would be prepared to pay more for more environmentally friendly packaging.**
- An overwhelming majority of Europeans agreed that governments should provide more information on environmentally friendly packaging and a majority support a tax to force its adoption.
- **Younger consumers feel more strongly about the need for environmental change than the older generation.**
- This study supports the findings of a similar survey in 2018. COVID-19 does not appear to have changed consumers' attitudes towards packaging or the environment.

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Pro Carton is the association of European
Cartonboard and Carton manufacturers

For further information, please see
www.procarton.com



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