

INFLUENCE OF PACK FORMAT AND MATERIAL ON PERCEIVED ENVIRONMENTAL PRODUCT BENEFITS



AUTHORS: L. Brillault, P. Bailey – Ipsos

INTRODUCTION

Sustainability is fast becoming the new business imperative, with 83% of global citizens saying that we are heading for an environmental disaster if we don't change our habits soon.¹ When it comes to whose responsibility it is, citizens have given governments and business a mandate to act, with almost 7 in 10 global citizens (68%) saying that if businesses don't act now to combat climate change, they will be failing both their employees and customers.²

Although when we look at the various environmental concerns that people have, the accumulation of waste, packaging and plastic is the No.1 concern across the globe (46%)³, ahead of climate change (44%).

Three-quarters of people across 28 countries agree that single-use plastic should be banned as soon as possible and more than 8 in 10 global citizens say they would like to see an international treaty to combat plastic.⁴

Moving towards more sustainable packaged products is both an opportunity to help the planet but also a commercial opportunity with consumers looking to more environmentally friendly solutions. Removing unnecessary packaging is a key step, although our research shows that using different packaging designs and materials can provide a significant impact as a driver of choice for Sustainability related claims.

SAMPLE & METHODOLOGY

- Brazil, China, Germany, UK, USA
- Base ~400 per market for each survey
- Males & Females
- 18-65 years old

Ipsos DUEL (paired comparison based including time response)

1. Appeal for 40 Sustainability claims for the Food category
2. Appeal for 37 Sustainability claims for Household and Personal Care (HPC) category
3. Appeal for 5 Sustainability claims illustrated with 5 different Caffé Latte pack designs/formats for the Food category
4. Appeal for 5 Sustainability claims illustrated with 6 Moisturising Body Cream pack designs/formats for HPC

3.A SUSTAINABILITY CLAIMS RESULTS

Across all markets considered, in Food and Personal Care (PC), of 40 and 37 claims evaluated respectively (only 8 of the claims were packaging focused), the most appealing claim was 'Packaging decomposes naturally and isn't harmful to the environment'.

3.B IMPACT OF MATERIAL IN EACH CATEGORY

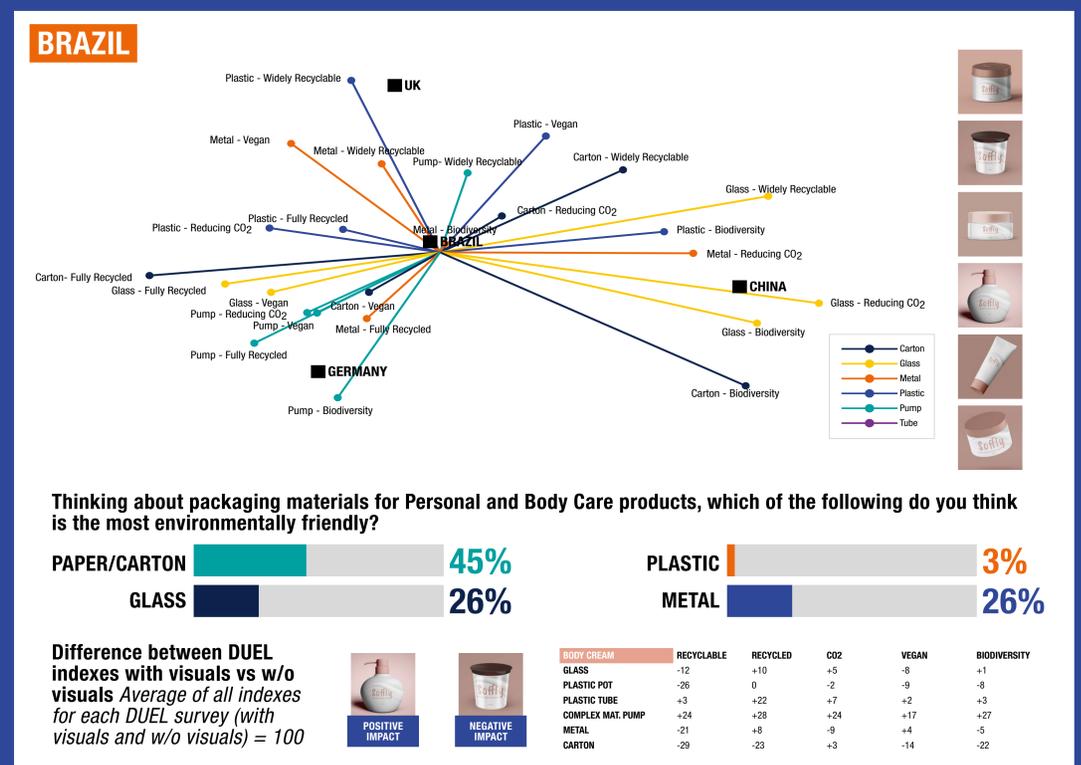
To illustrate the Food category, ready to drink (RTD) coffee was used with the hypothetical brand 'Café Maison'. RTD coffee is already available in all types of materials tested: glass bottle, transparent plastic bottle, sleeved plastic bottle, carton, can. Hence removing the novelty that could bias some of the answers.

For PC, we chose body moisturising cream with the hypothetical brand 'Softly'. Again all pack materials used can be found on the market.

In each market, we observed that whilst there is a positive or negative association between the pack material and a specific claim, this wasn't always intuitive (e.g. in Germany, plastic negatively impacting the appeal of the moisturising cream proposition when shown together with 'recyclable' and 'recycling' claims), nor consistent from one category to the other.

3.C IMPACT OF MATERIAL PER MARKET

We observed that in each market, there was positive or negative association between a pack material and specific claims. However, those associations were not consistent from one country to another. And, whilst asked in the context of sustainability, the pack formats that respondents were most likely to choose are not necessarily the product packaged in the material that they considered to be the most environmentally friendly. Category norms, may explain the extent of the positive impact of the pump and negative impact of the carton pot.



DISCUSSION

Results reinforce that there is no such a thing as a global consumer. Whilst each market showed at least one material having positive or negative association with at least one of the 5 claims looked at (recyclable, recycled, vegan, CO2 reduction and biodiversity), among the 5 markets considered, there was no alignment on the impact of a pack material on any of the claims. Within one market even, the impact of one material can be different for one category to another.

Although today, compostability seems to be the most appealing sustainability claim globally, consumers may not chose the packaging reflecting what material they said would be the most environmentally friendly.

To translate an overall sustainability strategy – whether global or local, into the most effective project pipeline, it is critical to understand and quantify the drivers of performance of the new pack design in key markets. This would help:

- mitigate the risk and cost associated with a new packaging design, from sourcing of the new material to investment in new production line assets
- adjust at a local level, the communication to build on or overcome some of the implicit associations between a pack material and a sustainability claim.

IPSOS INNOVATION



IPSOS SUSTAINABILITY



1. Global Trends Survey, 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets interviewed August - September 2021
2. Base: 2022: 22, 033 online adults aged 16-74 across 29 countries; 2021: 20,511 online adults aged 16-74 across 29 countries. Fieldwork dates: 18 Feb - 4 Mar 2022; 19 Feb - 5 Mar 2021
3. Source: EDF & Ipsos Global Study, Online, 24,000 people 16-75, 30 countries, 30th August - 21st September 2021
4. This 28-country Global Advisor survey was conducted between 20th August and 3rd September 2021 via the Ipsos Online Panel system among 20,513 adults aged 18-74 in Canada, Israel, Malaysia, South Africa, Turkey and the United States, and 16-74 in all 21 other countries.