

THE CHALLENGE OF PLASTIC PACKAGING AND WASTE

An Ipsos Briefing: November 2019

GAME CHANGERS



USER GUIDE

How to respond to the challenges presented by the growth of plastic packaging and the resulting environmental problems we see in the world around us? It's a topic on the agenda for **Ipsos clients around the world: manufacturers, retailers, governments...**

This document from the Ipsos Knowledge Center brings a range of Ipsos resources into a single place. We reference **external reports and data sources** along the way.

Everything here is in the public domain and can be shared freely. See next page for a **summary** of our published reports.

This resource is therefore intended to supplement our published work. It has two underlying principles:

- To provide stimulus for conversations and context to our work. We hope that, by providing the material in this format, it can be **adapted and used with clients**, for example to support conversations or to provide context to reports and presentations.
- To serve as an ongoing **resource base**, to help us navigate the various topics, rather than as a stand-alone presentation. Although if you think your client will like the full document, it's fine to share it with them!

Given the above, we are not putting the full resource on our website. Please contact **Simon Atkinson, Mathieu Doiret** or **Ian Payne** with any questions.

PUBLICATION GUIDE

Ipsos research and reports on packaging and waste

- **Earth Day 2019.** A global study by Ipsos, carried out online among adults across 28 countries about environmental concerns including plastic waste.
 - [See the report](#)
- **A Throwaway World.** A global study by Ipsos, carried out online among adults across 28 countries about the issues of plastic waste and recycling.
- **Thinking Green.** An Ipsos webinar on consumer perceptions on the future of packaging.
 - [See the deck](#)



PUBLICATION GUIDE

Ipsos research and reports on related topics

- **What the Future: Food.** An issue of the *What The Future* series with data from a global survey and an article on sustainable packaging.
 - [See the report](#)



- **The Tetra Pak Index 2019.** A global study by Ipsos on behalf of Tetra Pak also covering the issue of plastic waste (including the potential impact of microplastics on human health)
 - [See the report](#)

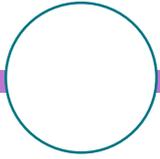


WHAT DOES THIS ALL MEAN?

OUR POV



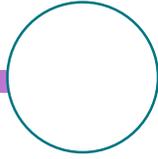
OUTLINE



Increasingly, brands will have to operate in a more **constrained environment with packaging material, coming under more scrutiny from government and consumers alike.**

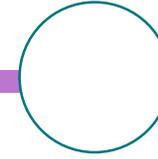
*Fifty years on from the birth of the recycling symbol, we're at a metaphorical **tipping point** where **fundamental attributes of packaging design are challenged.***

© Ipsos | The Challenge of Plastic Packaging and Waste



Packaging development will be well served by **leveraging insights which recognize people as both consumers and citizens**

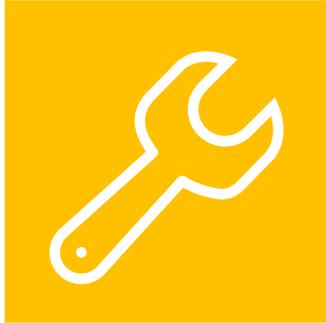
*The pack can communicate **higher order meanings**, such as **brand purpose** and packaging's role in the product life-cycle, with attention to sustainability.*



Manufacturers must increasingly demonstrate to consumers **tangible packaging outcomes which are understandable as a direct consequence of the CSR aspirations**

*Necessity is the mother of invention and **those companies who grasp the opportunity to take leadership have the potential for great reward***

HOW TO UNLOCK ANTI-WASTE PACKAGING'S LEVERS OF DEVELOPMENT OPPORTUNITIES



FUNCTIONALITY FOR BETTER OUTCOMES

Packaging which delivers an **easily understood functional benefit** e.g. food fresh for longer, **in addition to a positive environmental association** e.g. volume, ease of fulfilment, weight, material, will resonate with consumers.



BETTER COMMUNICATION

Opportunity to promote better **understanding** of the reason why a particular material is used. Consumers see a wide range of claims as essentially equally trustworthy. Is it time for **enforced definitions and for more transparency** in terms of actual expected recyclability. Can **technology** (e.g. QR codes and cleaner labels) be used to engage interested consumers on packaging's role in the full product lifecycle?



INCENTIVIZATION & TANGIBLE OUTCOMES

Brands which deliver **meaningful innovation** without compromising benefits or price, will be rewarded a **competitive advantage**. Of course more recyclable materials and less unnecessary packaging could be particularly rewarding in today's context. **What's in it for the consumer?** Positive outcomes are more likely when people are incentivized with systems that support behavior. Packaging which is more easily sorted and disposed of will encourage virtuous behaviours with tangible outcomes.

AGENDA

Content guide



A GROWING CONCERN

1

A GROWING CONCERN

This section covers consumers' awareness of and concern about the issues related to the impact of packaging waste on the environment.

PLASTICS: THE CRITICAL POINT WHERE SUSTAINABILITY, ENVIRONMENTAL AND HEALTH SAFETY ISSUES CONVERGE

2

PLASTICS

This section covers more specifically consumers' awareness of and concern about the impact of single-use and non-recyclable plastics on the environment and health.

RECYCLABILITY AS A SOLUTION... AND AN ISSUE

3

RECYCLABILITY

This section covers the challenges that consumers face when confronted with difficulty in identifying, using or properly sorting recyclable packaging.

ANTI-WASTE PACKAGING

4

ANTI-WASTE PACKAGING

This section covers the many ways in which brands can innovate to reduce the environmental footprint of packaging and encourage more virtuous consumer behaviours.

A GROWING CONCERN

1

WEF / MACARTHUR FOUNDATION: A PARTNERSHIP WHICH HIGHLIGHTS THE GLOBAL DIMENSION OF THE ISSUE...

...AND THREE STRATEGIES TO TRANSFORM THE GLOBAL PLASTIC PACKAGING MARKET



CORE PROJECT PARTNERS



WEF / MACARTHUR FOUNDATION: A PARTNERSHIP WHICH HIGHLIGHTS THE **GLOBAL DIMENSION** OF THE ISSUE...

The Ellen MacArthur Foundation and World Economic Forum (WEF) have collaborated closely to advance the circular economy since the Foundation, and with McKinsey & Company, published its analysis of the economic opportunity of a circular economy in Davos, in 2012. Together with WEF, the Foundation leads Project Mainstream - a CEO-led initiative that helps to scale business-driven circular economy innovations. The Foundation is also an affiliate member of WEF's Platform for Accelerating the Circular Economy (PACE), a global public-private collaboration platform and project which aims to create systems change at speed and scale.

Building on this work, the Platform for Accelerating the Circular Economy - PACE- was launched in 2017 as a public-private collaboration, co-chaired by the CEO of Philips, the heads of the Global Environment Facility and UN Environment, with the Ellen MacArthur Foundation, the International Resource Panel, Circle Economy and Accenture Strategy as knowledge partners. The World Economic Forum hosts and facilitates the Platform.

PACE aims to create systems change at speed and scale by enabling partners to:

- Develop blended financing models for circular economy projects, in particular in developing and emerging economies
- Help create and adjust enabling policy frameworks to address specific barriers to advancing the circular economy
- Bring the private and public sector into public-private collaborations to scale impact around circular economy initiatives

The Global Leadership Group currently includes over 40 CEOs, Ministers and heads of international organizations committed to leading a portfolio of projects and activities. Project focus areas include - plastics, electronics, food & bio economy and business model and market transformation across China, ASEAN, Europe and Africa.

THREE DISTINCT TRANSITION STRATEGIES TO ACCELERATE THE SHIFT TOWARDS THE NEW PLASTICS ECONOMY (SHARE OF PLASTIC-PACKAGING MARKET BY WEIGHT)

1. Without fundamental redesign and innovation about 30% of plastic packaging will never be reused or recycled
2. For at least 20% of plastic packaging, reuse provides an economically attractive opportunity
3. With concerted efforts on design and after-use systems, recycling would be economically attractive for the remaining 50% of plastic packaging

(Source: [World Economic Forum](#))

WE HAVE A PROBLEM: CONSENSUS IS GROWING GLOBALLY

Q. We are heading for environmental disaster unless we change our habits quickly

KEY:



In the wake of the Paris conference on climate there was a significant shift towards increased awareness of the seriousness of man-made ecological disasters.

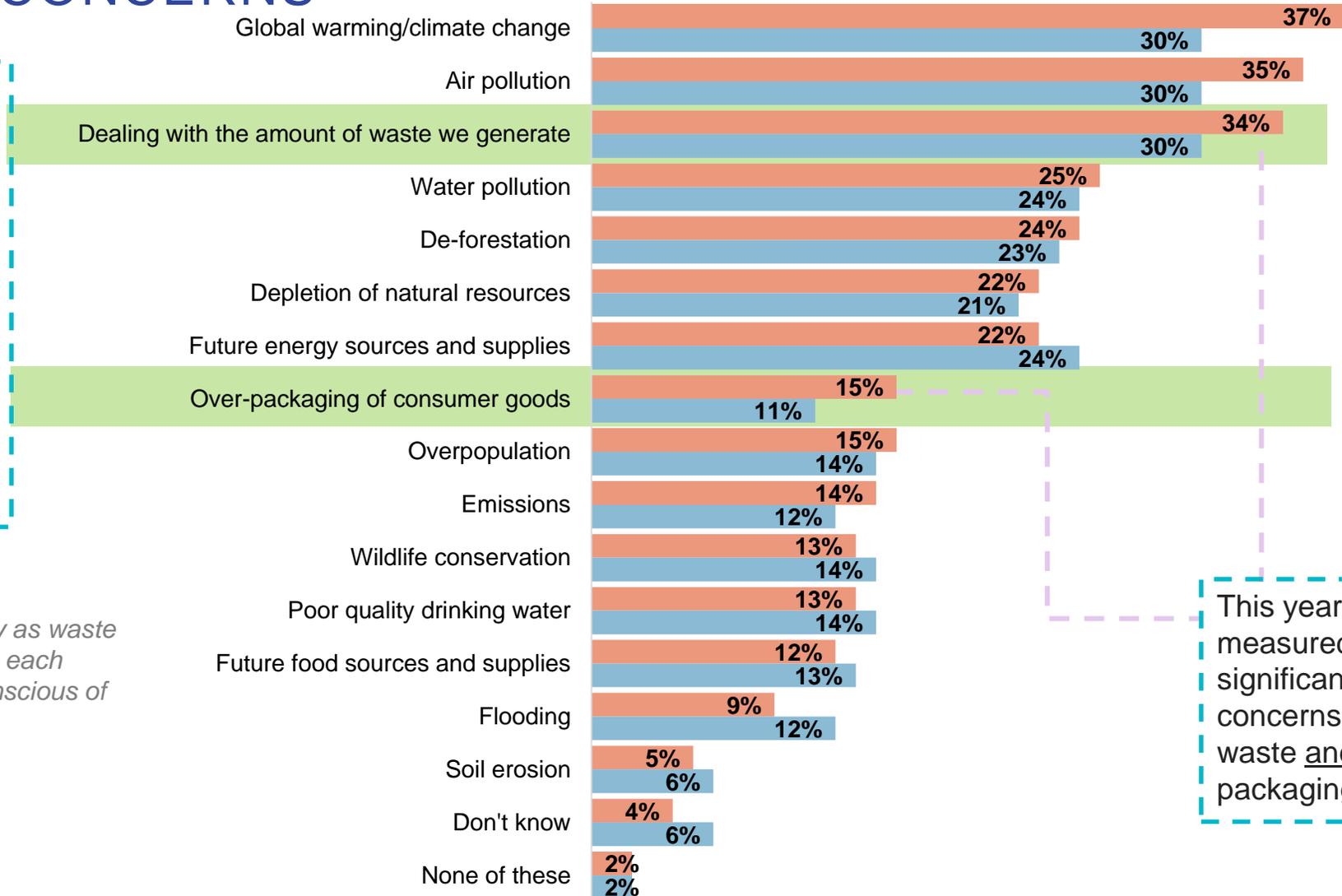


CONSUMERS ARE INCREASINGLY AWARE: WASTE AMONG TOP 3 ENVIRONMENTAL CONCERNS

Q. In your view, what are the **three most important environmental issues** facing [COUNTRY] today?

That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

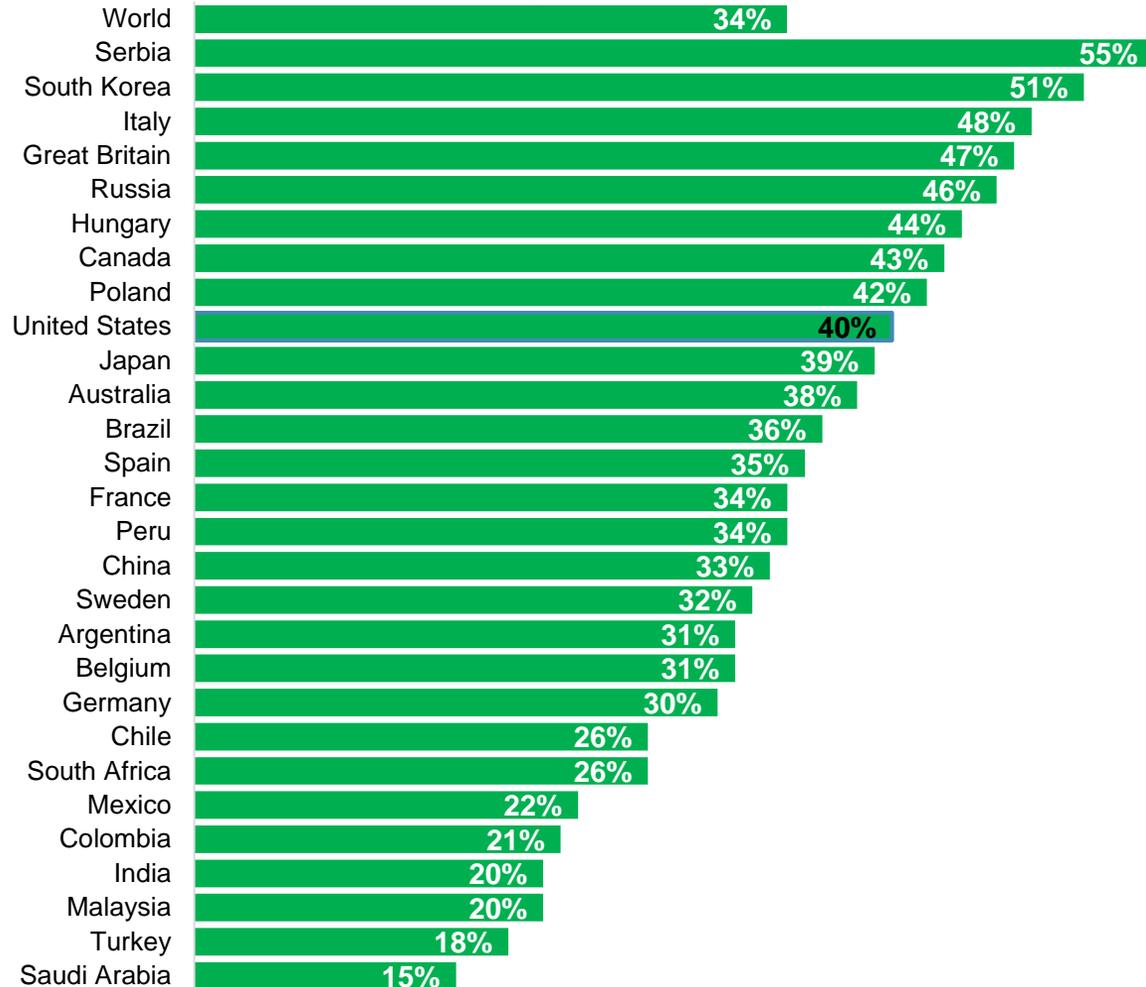
Over-packaging is not understood as clearly as waste is. It is thus necessary to link both issues to each other in order to make consumers more conscious of what is at stake with over-packaging.



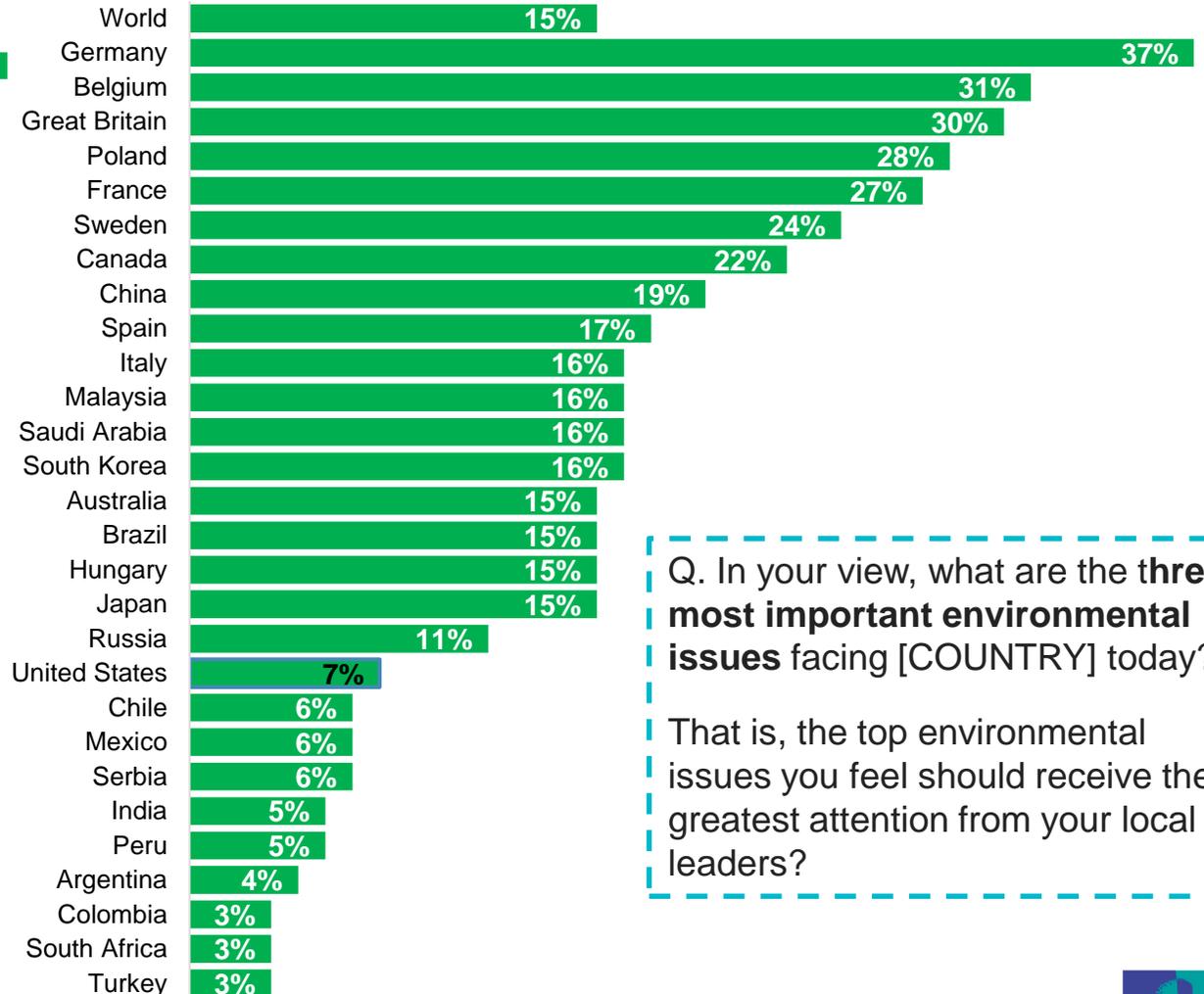
This year we measured a significant increase in concerns about both waste and over-packaging

NORTHERN EUROPE MOST CONCERNED ABOUT OVER-PACKAGING

% responding 'dealing with the amount of waste we generate'



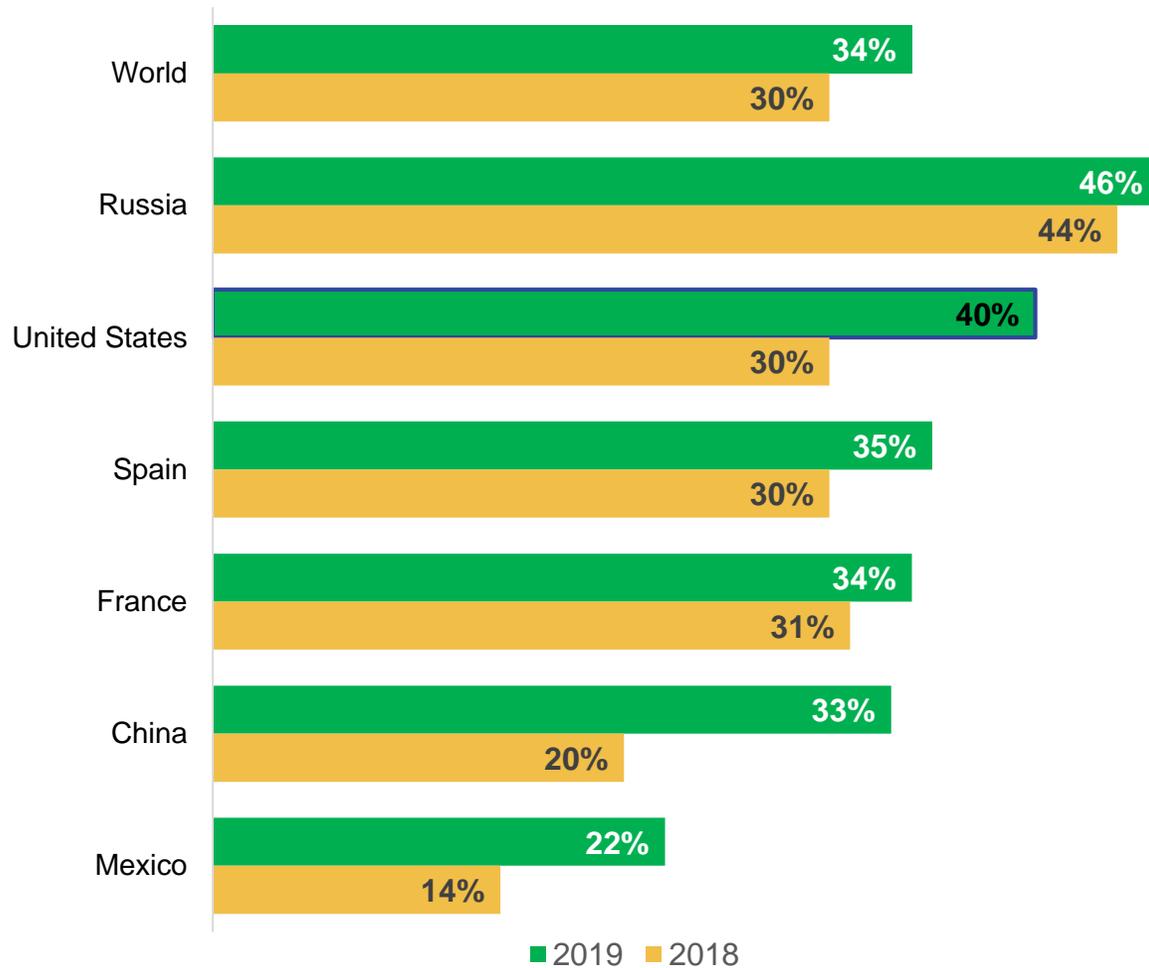
% responding 'over-packaging of consumer goods'



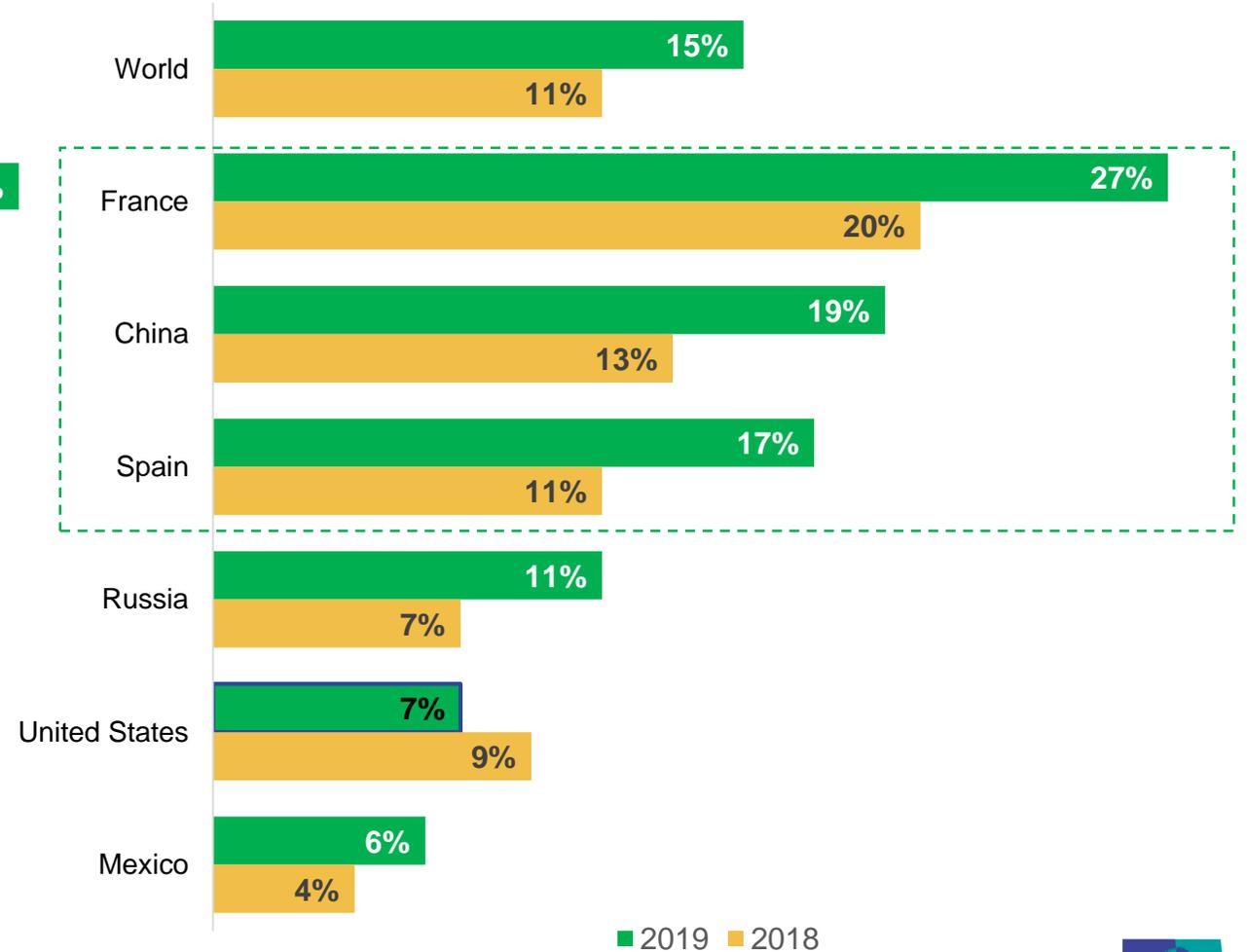
Q. In your view, what are the **three most important environmental issues** facing [COUNTRY] today?
That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

CHANGE IN SELECT COUNTRIES

% responding 'dealing with the amount of waste we generate'



% responding 'over-packaging of consumer goods'

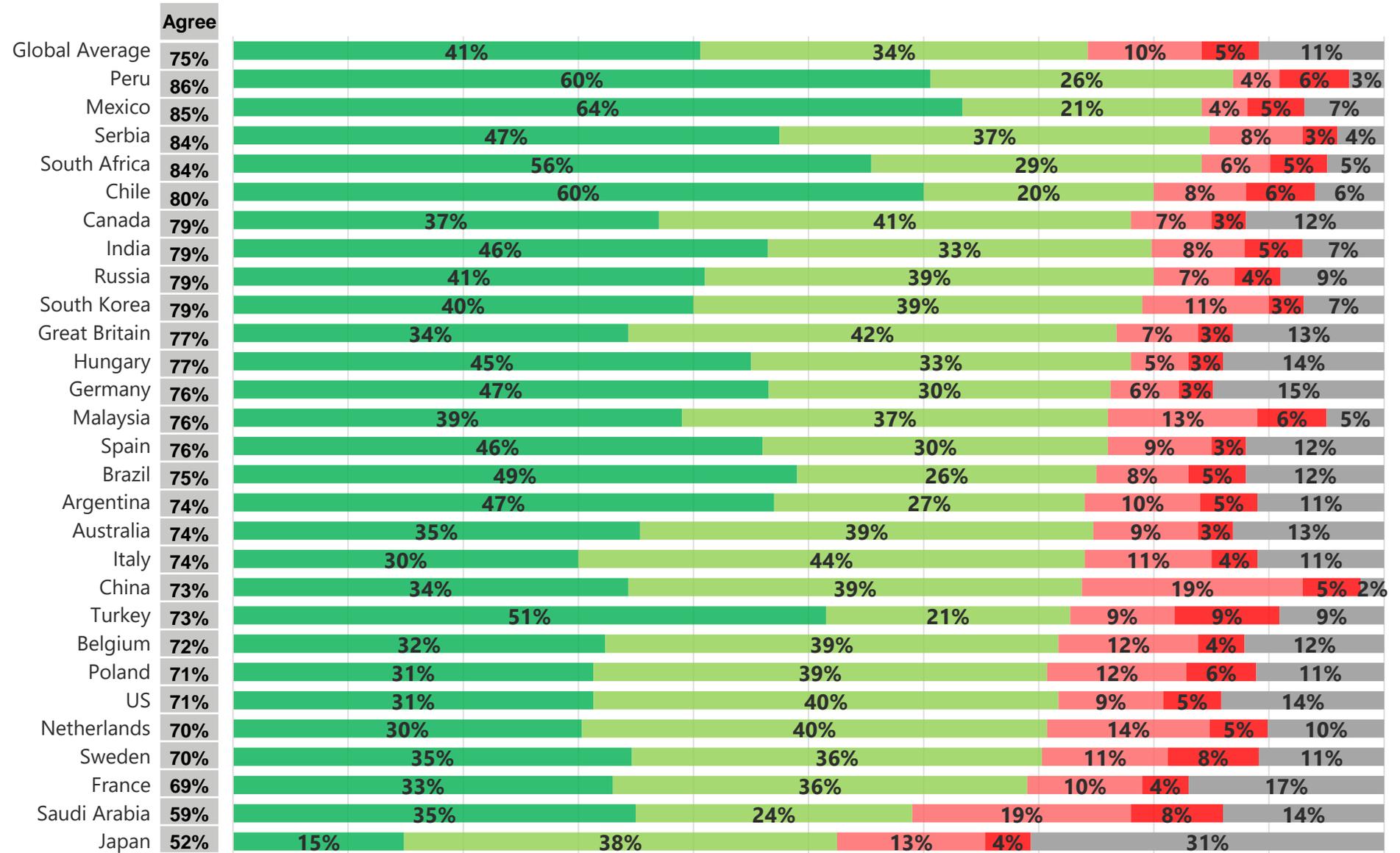


A GROWING CONCERN ATTITUDES TOWARDS ENVIRONMENTALLY VIRTUOUS BRANDS

Q. Do you agree or disagree with the following statement?

I feel better about brands which make changes to achieve better environmental outcomes

A strongly positive attitude towards brands which make changes to achieve better environmental outcomes is more evident in emerging economies like Peru (60% strongly agree), Mexico (64%), Chile (60%), and also Turkey (51%), than in the most affluent countries like Japan (15%), the US (31%), the Netherlands (30%), France (33%), Sweden (35%), but also Saudi Arabia (35%) (a country with a higher GDP per capita than Germany).



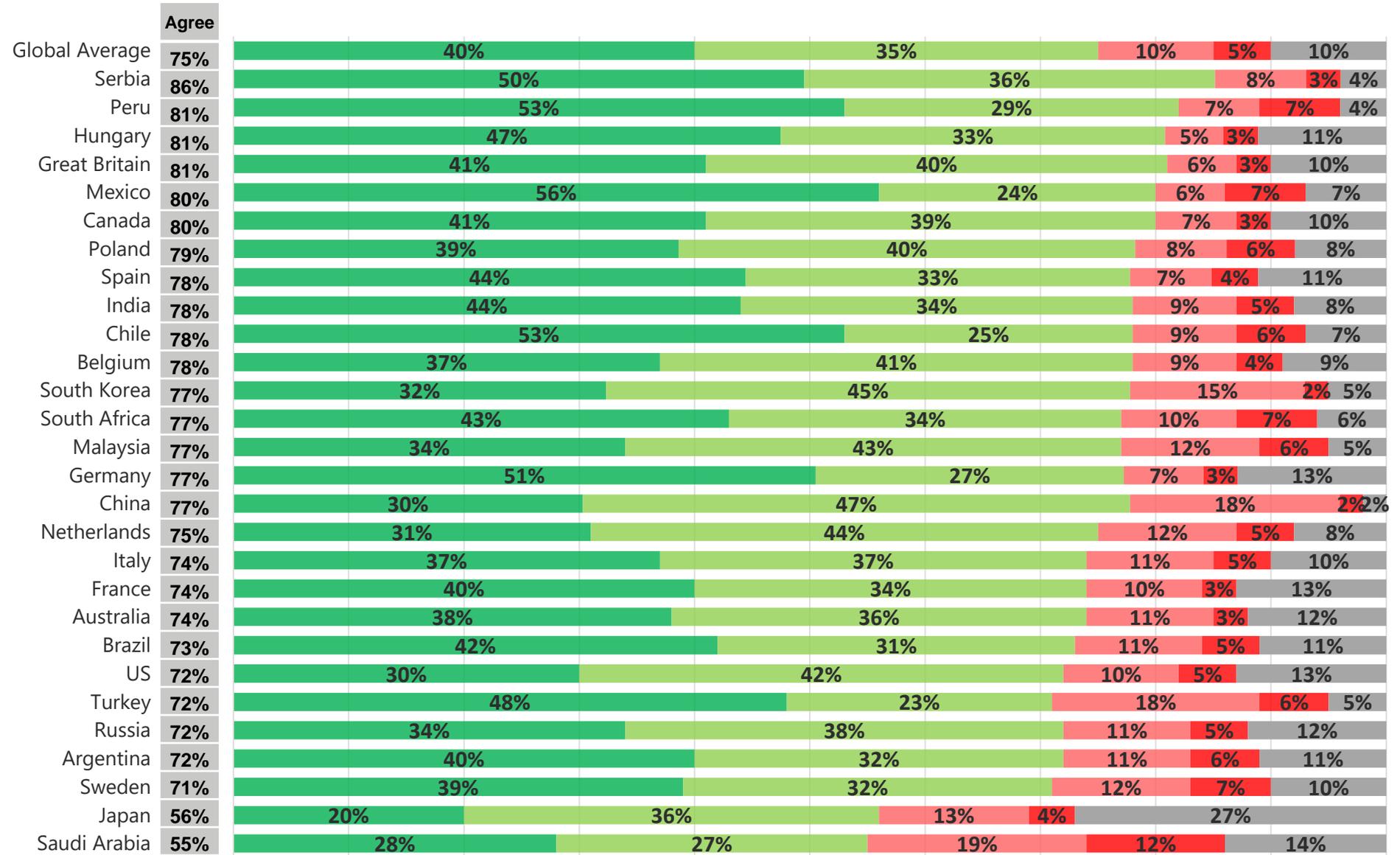
Strongly agree Tend to agree Tend to disagree Strongly disagree Don't know

Q. Do you agree or disagree with the following statement?

I want to buy products which use as little packaging as possible

People around the world say they are ready for change. Three in four global consumers (75%) say they want to buy products with as little packaging as possible, a figure which rises to 81% in Great Britain, Hungary and Peru and 86% in Serbia.

Saudi and Japanese consumers (with respectively 56% and 55%) are the least determined, but nowhere does the proportion of consumers actively disagreeing surpass a third of the total.

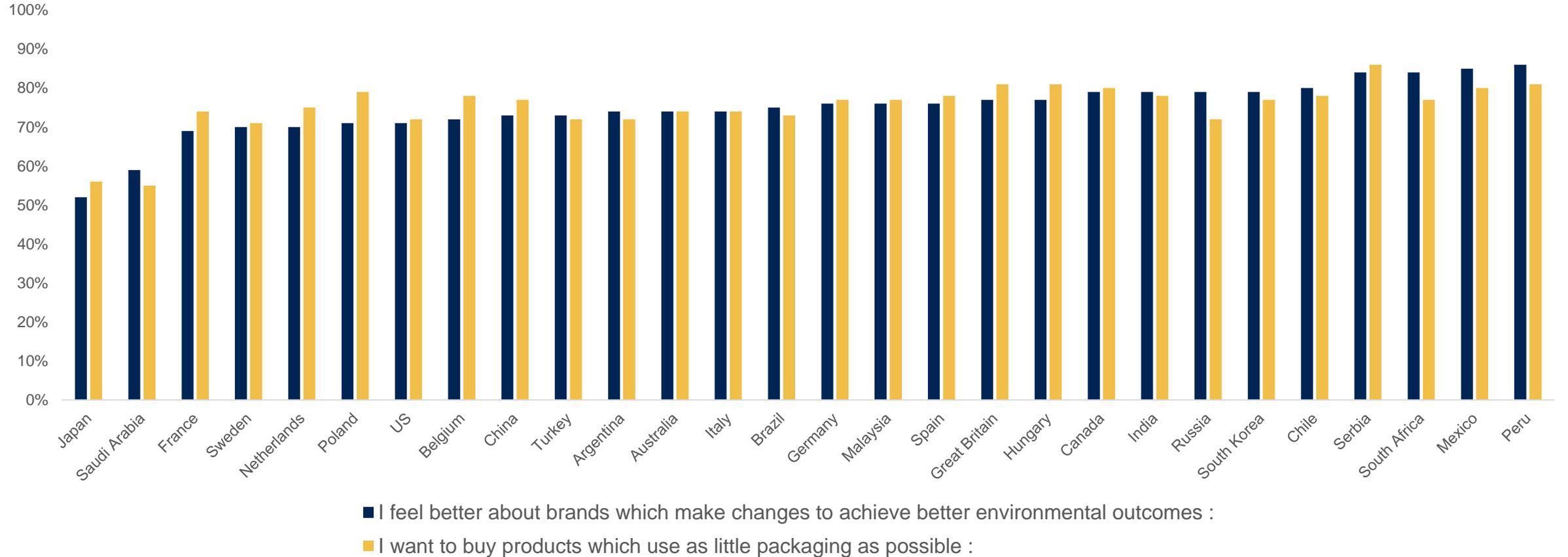


Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

A GROWING CONCERN

ALMOST TOTAL CORRELATION (ACROSS COUNTRIES) BETWEEN PREFERENCE FOR BRANDS ACHIEVING BETTER ENVIRONMENTAL OUTCOMES AND WILLINGNESS TO BUY PRODUCTS WITH NO OR LITTLE PACKAGING

Agree (%)



■ I feel better about brands which make changes to achieve better environmental outcomes :

■ I want to buy products which use as little packaging as possible :

Source: Throwing World Survey

Base: 19,515 adults aged 16-64/74 across 28 countries, online, August 2019

Correlation coefficient= 0.846352952

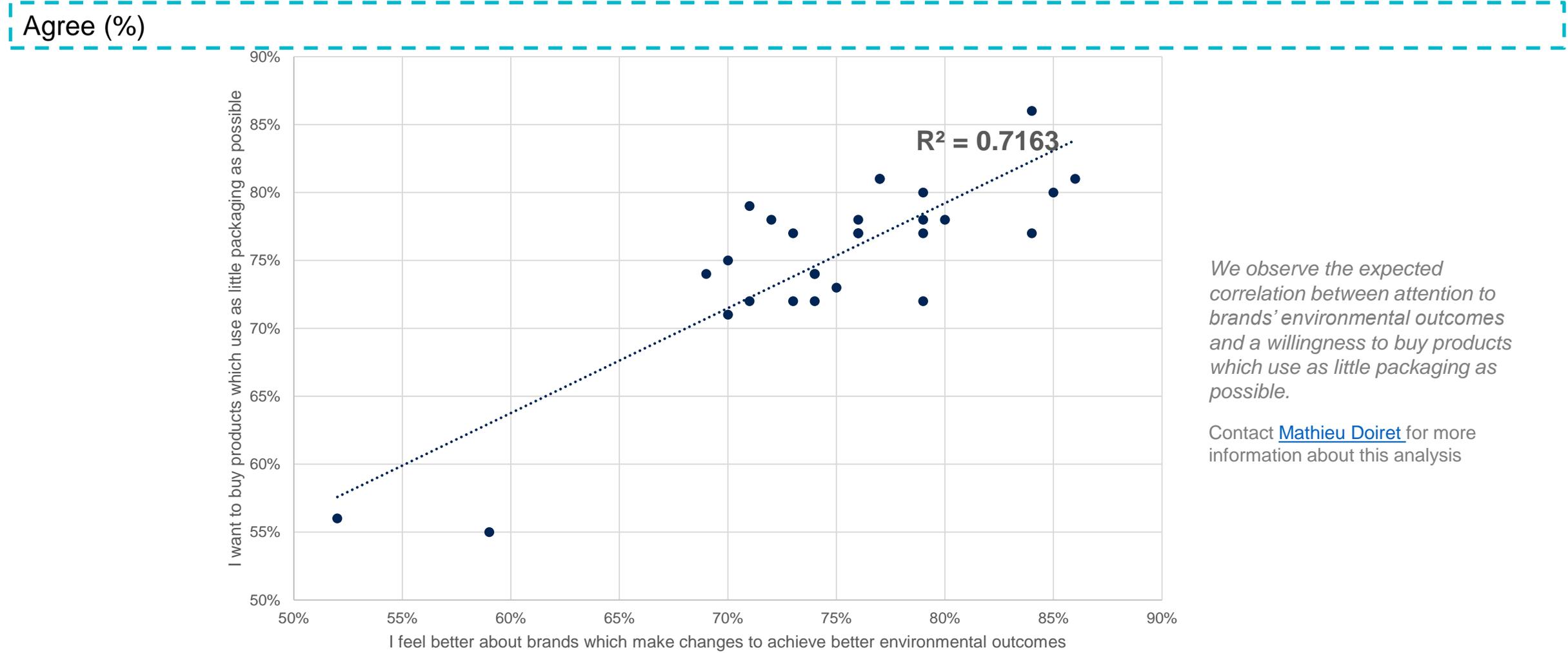
© Ipsos | The Challenge of Plastic Packaging

Contact [Mathieu Doiret](#) for more information about this analysis



A GROWING CONCERN

ALMOST TOTAL CORRELATION (ACROSS COUNTRIES) BETWEEN PREFERENCE FOR BRANDS ACHIEVING BETTER ENVIRONMENTAL OUTCOMES AND WILLINGNESS TO BUY PRODUCTS WITH NO OR LITTLE PACKAGING

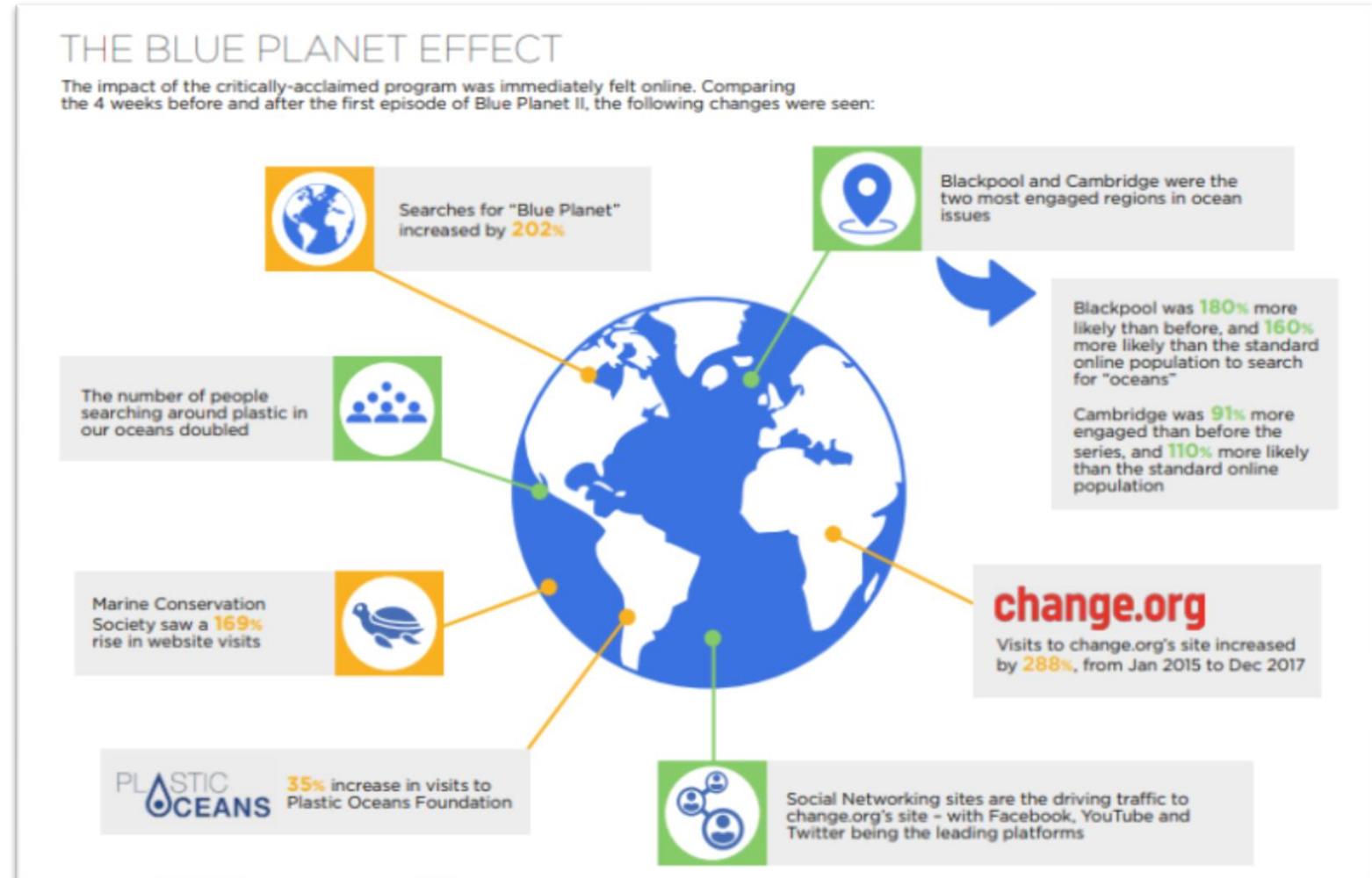


We observe the expected correlation between attention to brands' environmental outcomes and a willingness to buy products which use as little packaging as possible.

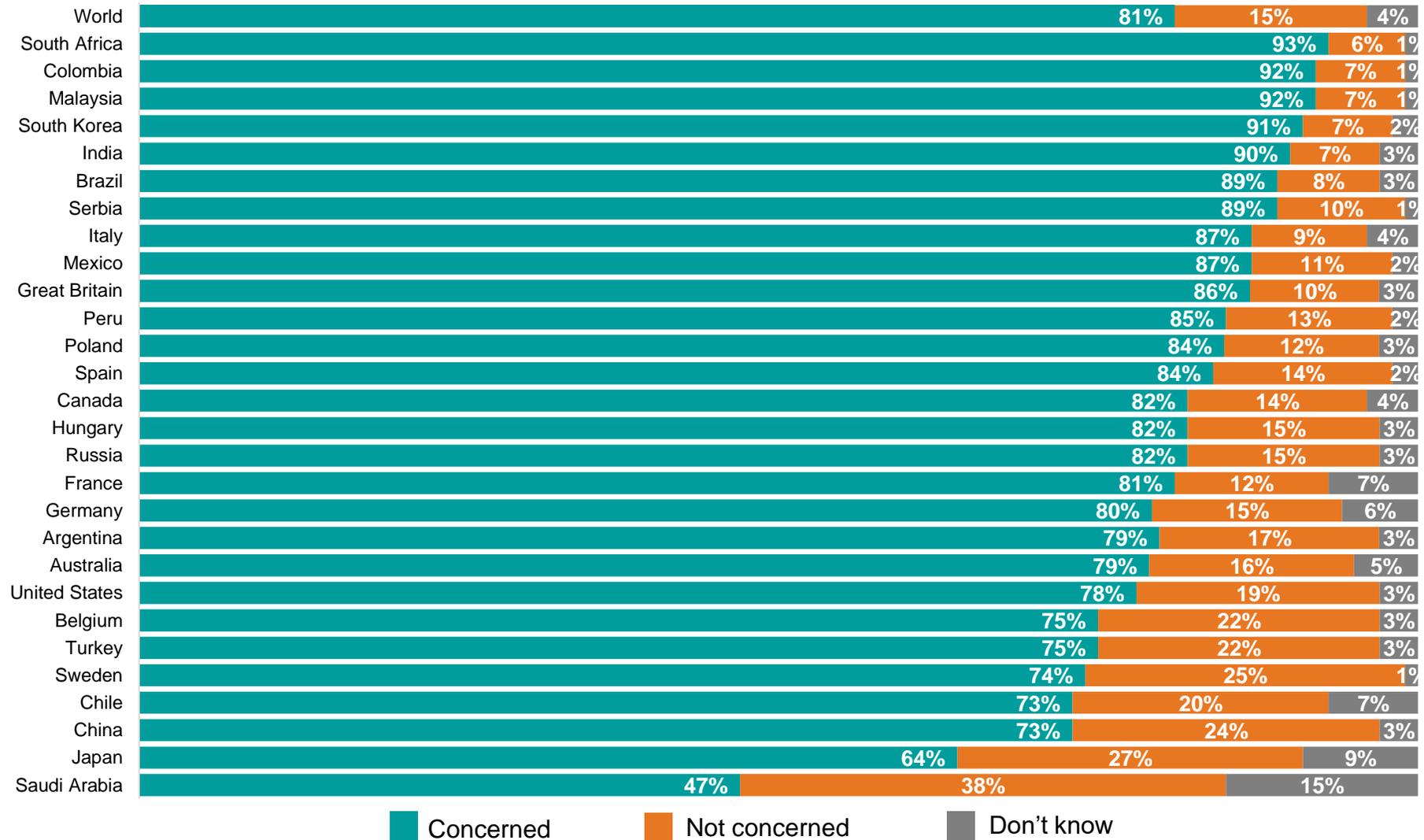
Contact [Mathieu Doiret](#) for more information about this analysis

A CASE STUDY: INTERNET SEARCHES OF “PLASTIC RECYCLING” IN THE UK ROSE BY 55% FOLLOWING DAVID ATTENBOROUGH’S APPEAL IN THE FINAL EPISODE OF BLUE PLANET II

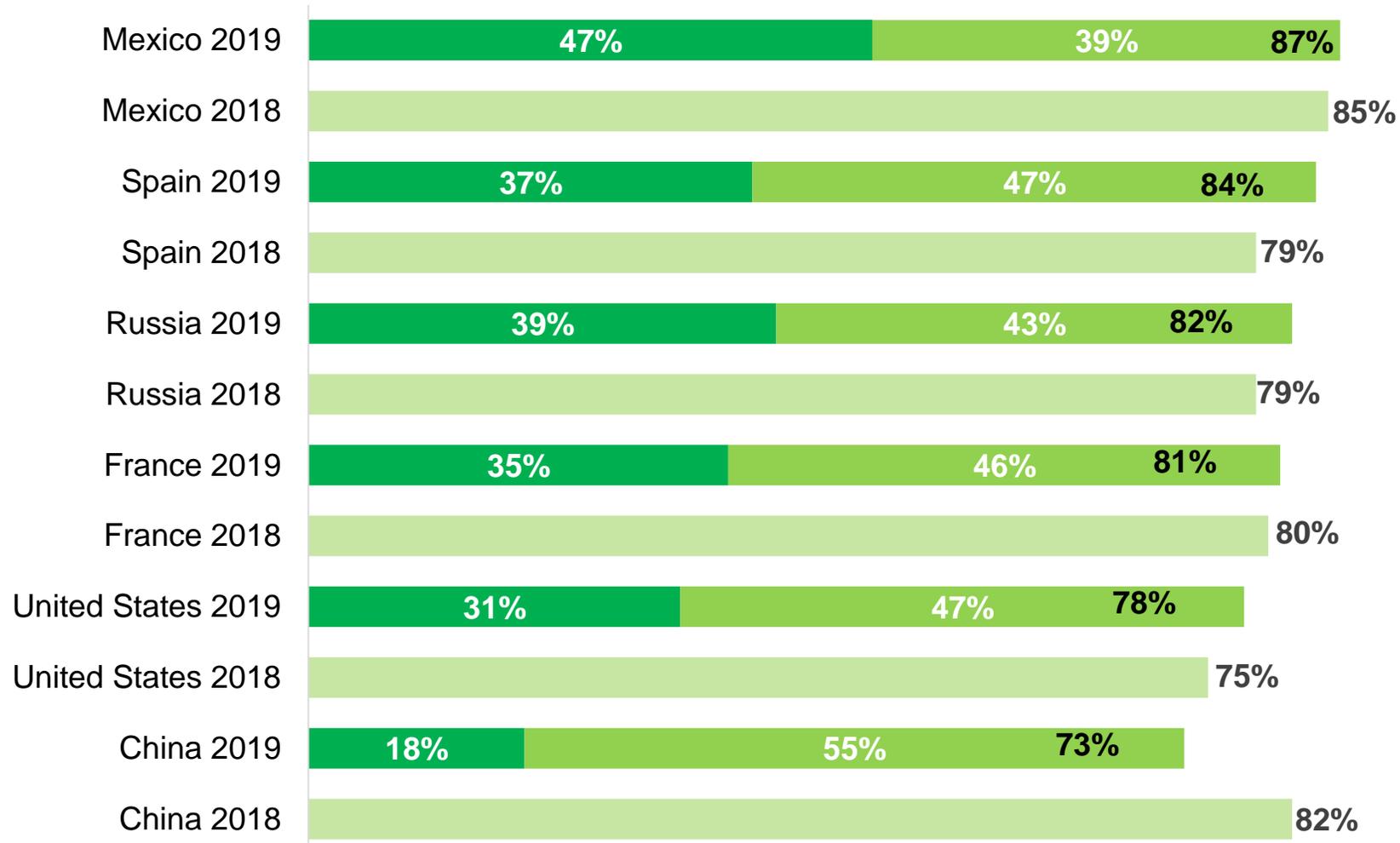
This reminds us of the impact that other documentary films could have had in the past like e.g. Al Gore’s An Inconvenient Truth in 2006. (In July 2007 a 47-country internet survey conducted by The Nielsen Company and Oxford University found, 66% of those respondents who said they had seen An Inconvenient Truth stated that it had "changed their mind" about global warming and 89% said it had made them more aware of the problem. Three out of four (74%) said they had changed some of their habits because of seeing the film).



RIISING CONCERN ABOUT USE OF DISPOSABLE, NON-RECYCLABLE PRODUCTS

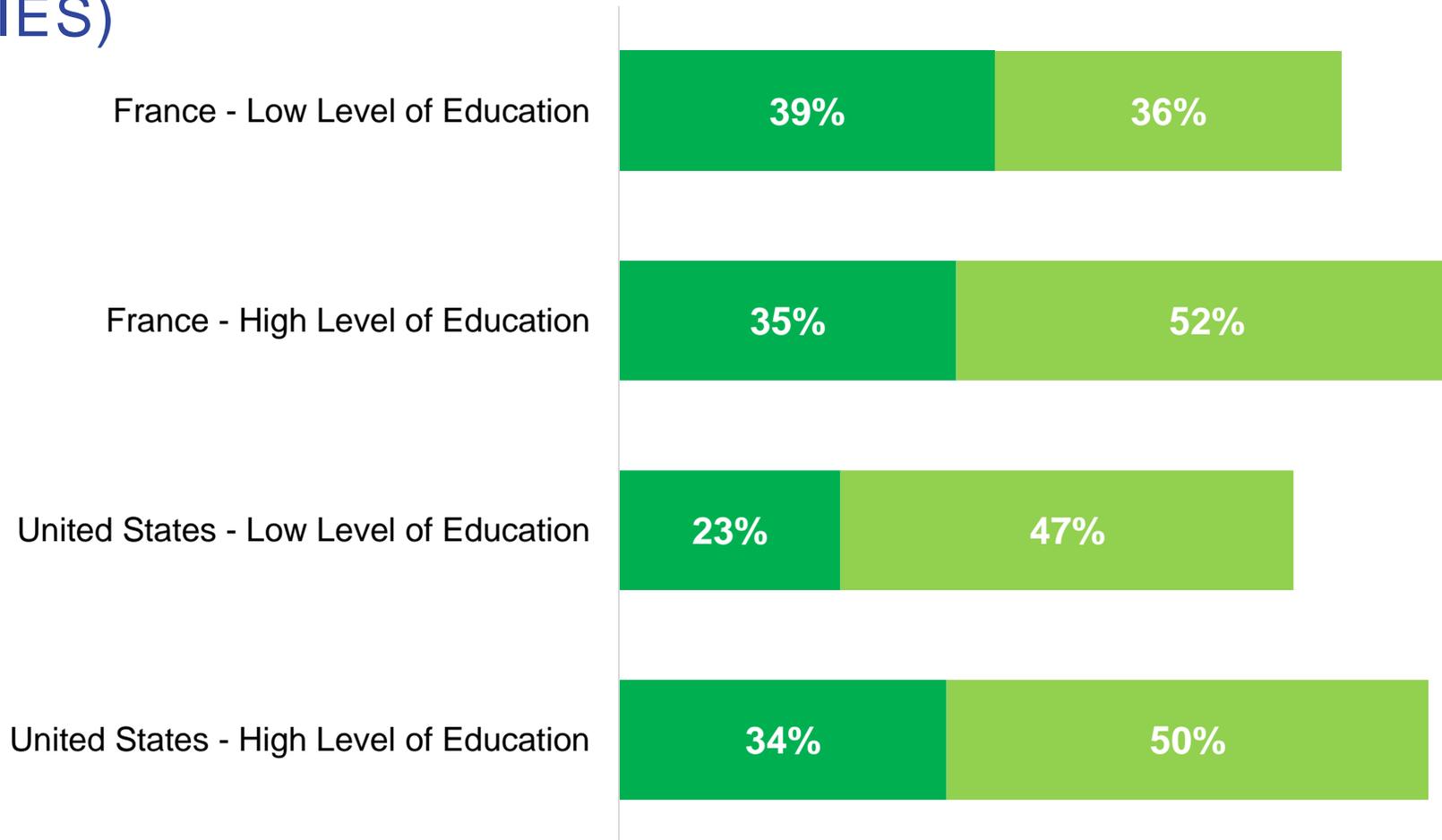


RISING CONCERN ABOUT THE USE OF DISPOSABLE, NON-RECYCLABLE PRODUCTS - FOCUS ON SELECT COUNTRIES



Concern is growing everywhere

RISING CONCERN ABOUT THE USE OF DISPOSABLE, NON-RECYCLABLE PRODUCTS - FOCUS ON DEMOGRAPHICS (SELECT COUNTRIES)



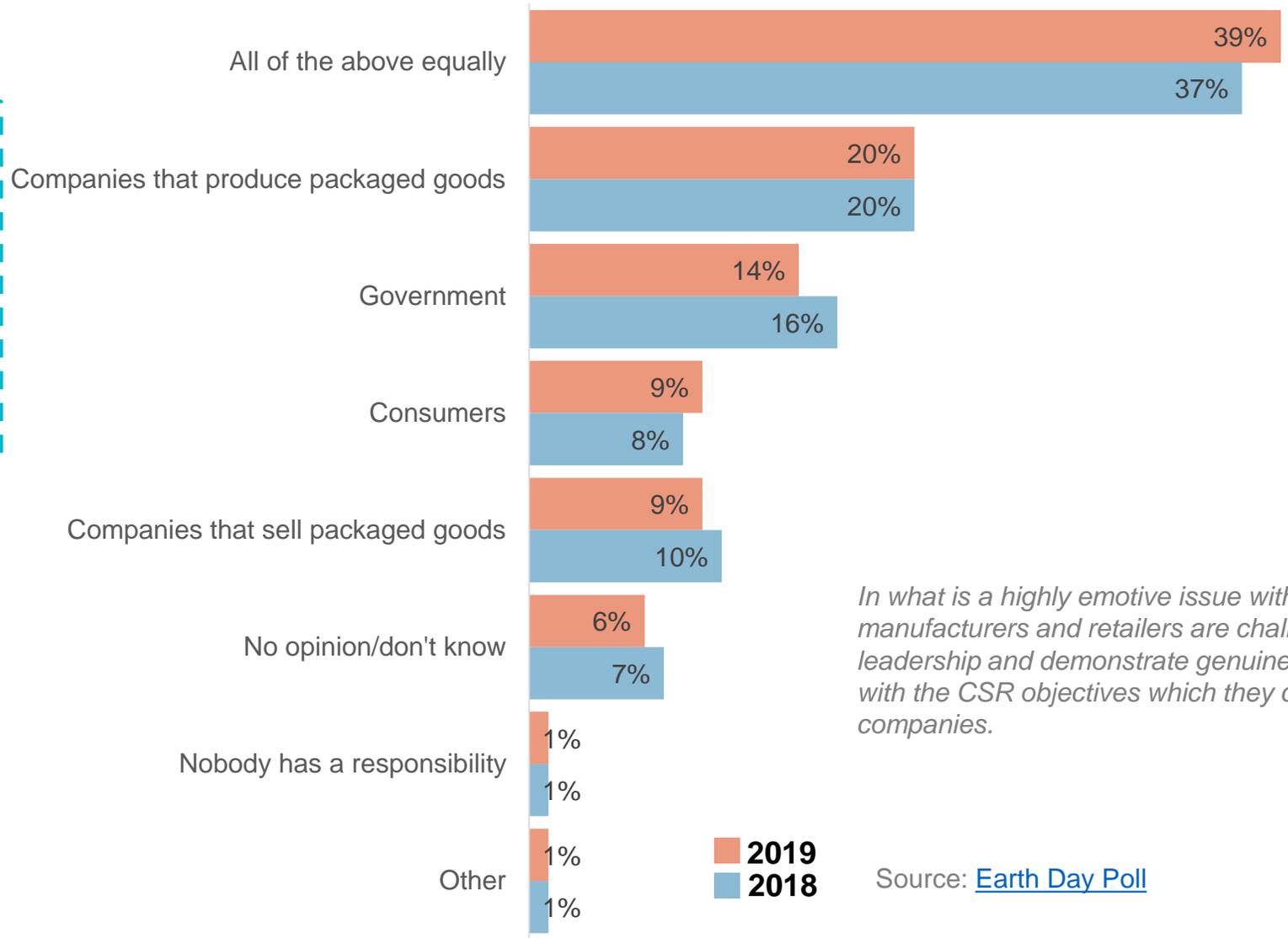
But it remains more frequent among people with a higher level of education

■ Very concerned ■ Fairly concerned

Source: [Earth Day Poll](#)

CONSUMERS ARE NOT READY TO CARRY THE BURDEN ALONE...

Q. Who if anybody do you believe **should take most responsibility** for finding a way to reduce the amount of **unnecessary packaging** which is sold?

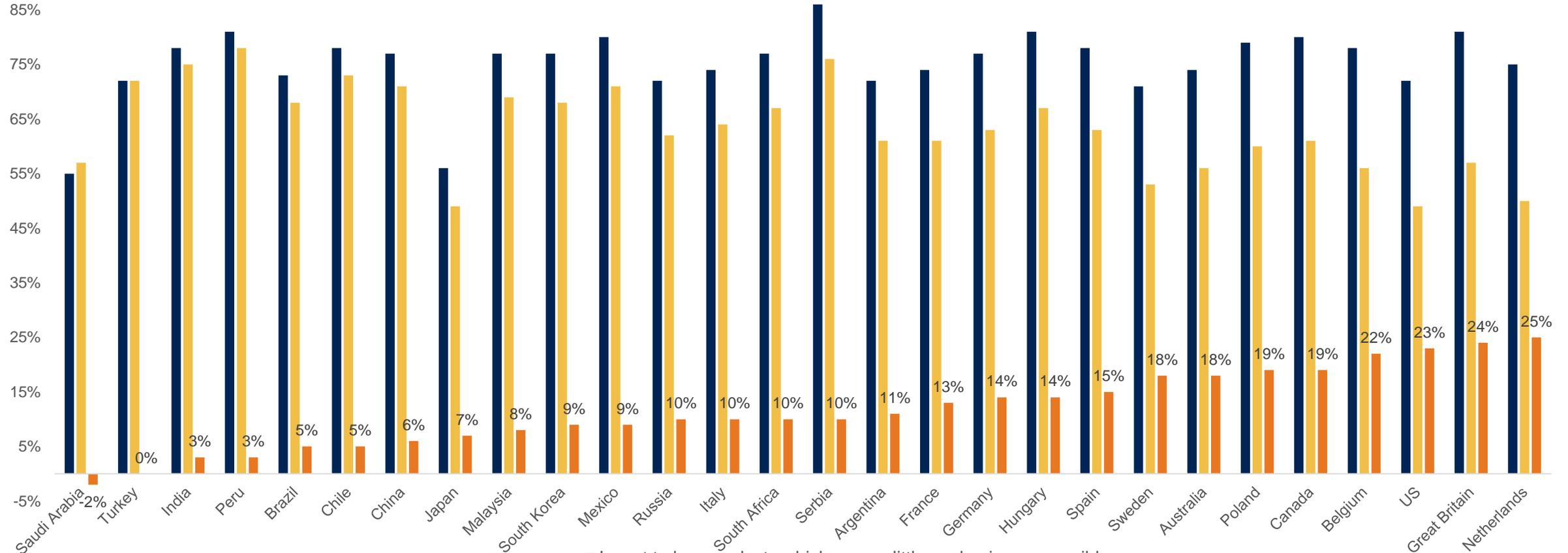


In what is a highly emotive issue with growing saliency, manufacturers and retailers are challenged to take leadership and demonstrate genuine change, consistent with the CSR objectives which they claimed for their companies.

Source: [Earth Day Poll](#)

MIND THE GAP BETWEEN GOOD INTENTIONS AND ACTUAL READINESS TO CHANGE SHOPPING HABITS

Agree (%)



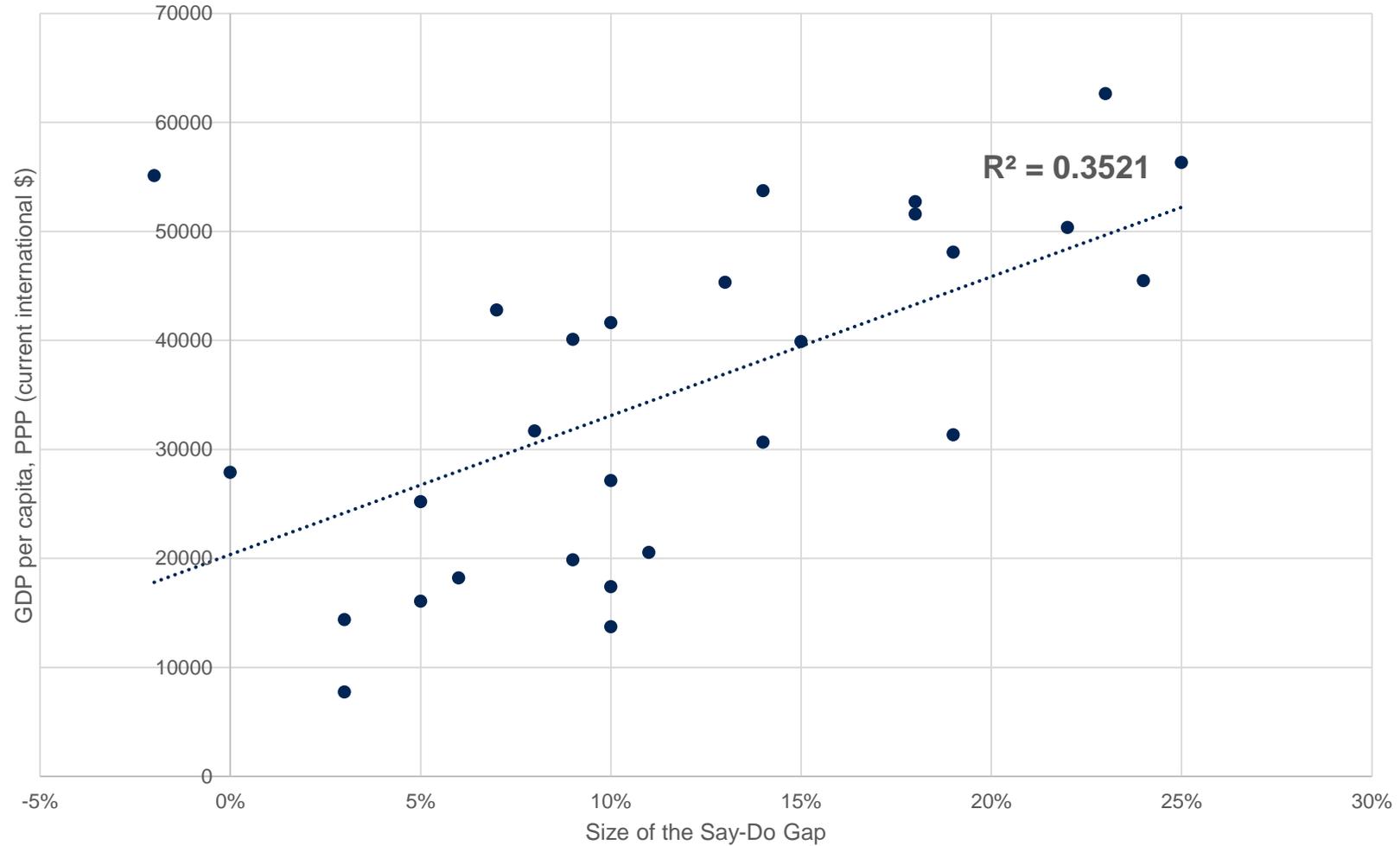
Source: Throwaway World Survey

Base: 19,515 adults aged 16-64/74 across 28 countries, online, August 2019

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MIND THE GAP BETWEEN GOOD INTENTIONS AND ACTUAL READINESS TO CHANGE SHOPPING HABITS



Source: Throwing World Survey

Base: 19,515 adults aged 16-64/74 across 28 countries, online, August 2019

The largest gaps are found in the rich countries

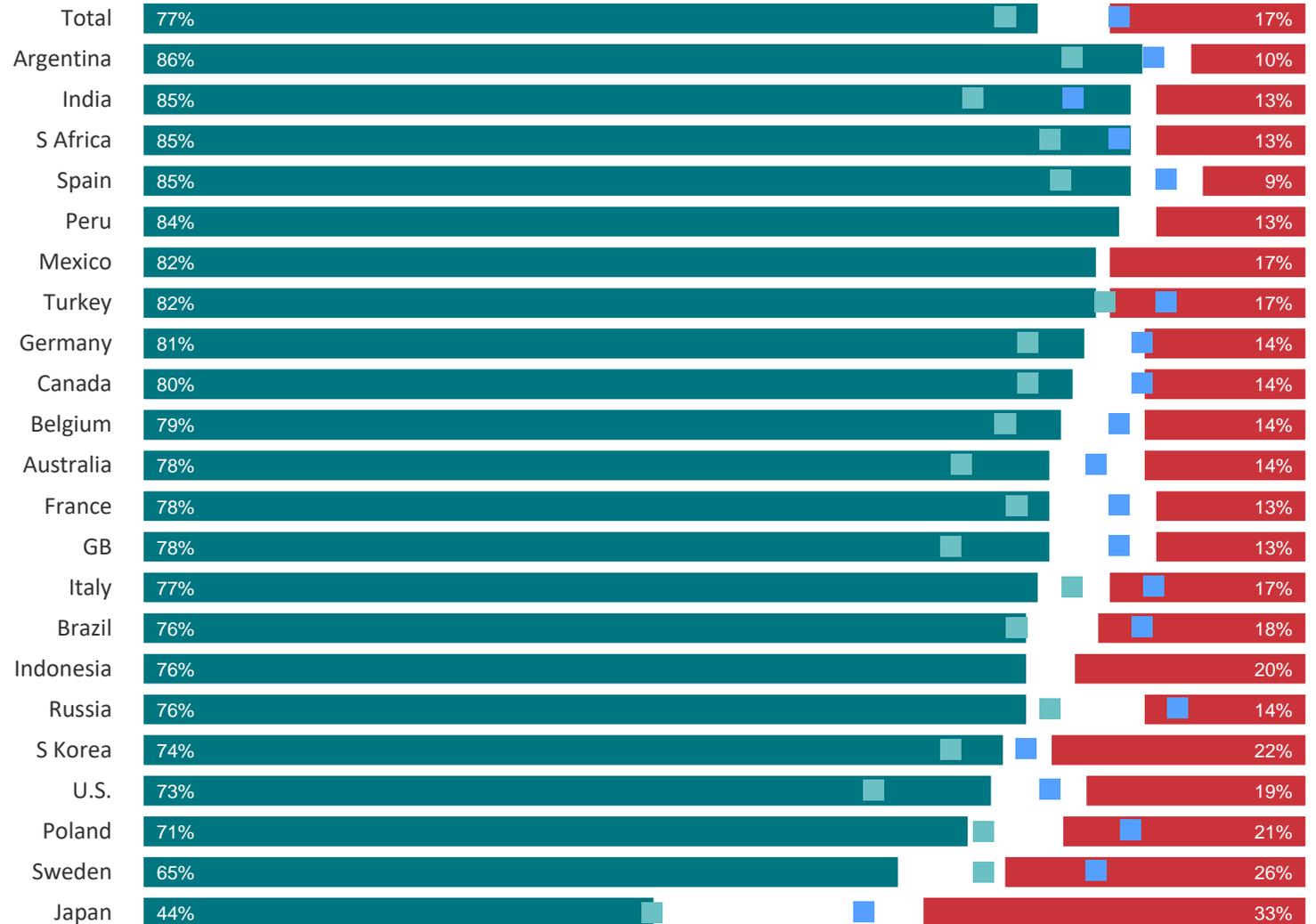
CONSUMERS THINK THAT COMPANIES AREN'T DOING ENOUGH

Q. Companies do not pay enough **attention to the environment**

KEY:

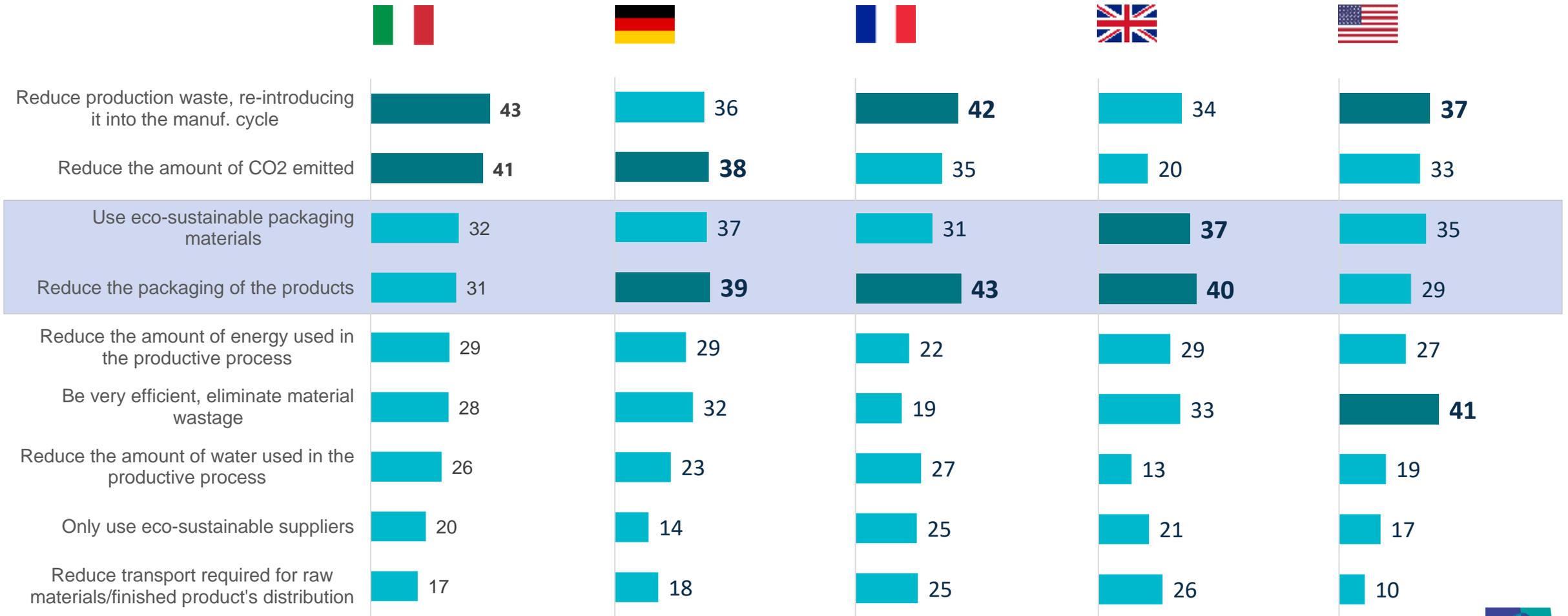


Companies could be easy scapegoats for the efforts consumers are not making...



FOCUSING ON PACKAGING IS A RELEVANT REQUIREMENT TO BECOME ECO-SUSTAINABLE

Q. To enable a company to be defined eco-sustainable, which of the following actions do you think it should undertake?



WHAT MARS IS DOING

PACKAGING AT MARS

At Mars, we're taking action across our packaging footprint.



Primary Packaging
What our consumers take home.



Secondary Packaging
Outer cartons, shipping trays, and retail displays.



Tertiary Packaging
Distribution pallets, stretch wrap, etc.



RECYCLING INFRASTRUCTURE

OUR CHALLENGE

Effective infrastructure is critical to collecting and recycling of used packaging. Collection services need to be convenient, recovery facilities must optimize the power of today's technologies, and markets for recycled material should support a business case for material recovery facilities.

OUR GOALS

- Support industry-wide adoption of initiatives that improve collection and recycling of packaging after consumer use.
- Identify and support the development of new technologies and innovations that expand the amount of packaging material that can be recycled.

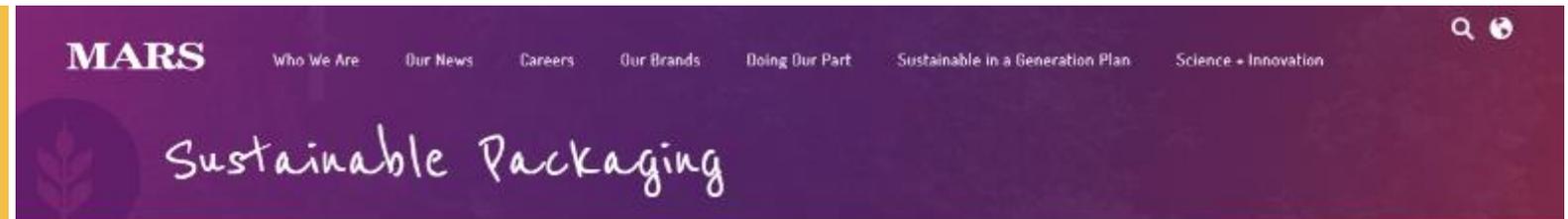


collaboration

Cookie Consent

OUR GOALS

- Continue to work toward packaging that is 100% recyclable by 2025
- Increase recycled content of pulp- and paper-based materials



MARS Who We Are Our News Careers Our Brands Doing Our Part Sustainable in a Generation Plan Science + Innovation

Sustainable Packaging

WHAT NORTH SAILS IS DOING

North Sails Manifesto:

“Every breath you take and every drop of water you drink comes from the sea. The ocean generates 50% of the oxygen we breathe, it regulates the climate and is an essential source of food, energy and life. In fact, it is so vast that we often consider it limitless; able to satisfy our increasing needs and remaining immune to human interactions.

Although we cannot deny that something is changing. For years, a huge quantity of metals, plastic and pesticides have been pouring into the ocean compromising its flora and fauna. It is estimated that 8 million tons of plastic pollute it each year – that’s a truck full of plastic every minute. If we continue this way, by 2050 there will be more plastic in the ocean than fish.

The good news is that is not too late to take actions and changes can be reached starting by small daily gestures and individual choices. North Sails has its roots in the sea and decided to act for it, by raising awareness on the issue of plastic pollution in the ocean. We are only at the beginning of this challenging, yet stimulating, journey. Starting from Spring/Summer '18 we're donating 1% of our revenues to the Ocean Family Foundation and investing in a communication aimed to this objective. These are just little steps but, as you know, every great sea crossing must be dealt wave after wave.”

Go Beyond Plastic



<https://youtu.be/gU-pxqqiVgQ>

YouTube

Rechercher

North Sails Collection | Go Beyond Plastic

11 696 vues

112 3 PARTAGER ENREGISTRER

North Sails
Ajoutée le 22 mars 2018

S'ABONNER 1,5 K

WHAT LUSH AND H&M ARE DOING



Home > Stories > Our Values: Naked

Packaging generates an enormous amount of waste, with millions of tons ending up in landfills each year.



“SIMPLY RETURN FIVE CLEAN BLACK POTS TO ONE OF OUR SHOPS IN EXCHANGE FOR A FREE FRESH FACE MASK!”

RECYCLE YOUR CLOTHES

At H&M group, we believe it's senseless that so much clothes and discarded textiles end up in landfills. Recycling is one of many ways fulfil our goals towards a sustainable future. In 2017 we collected more than 17,771 tonnes of textiles – the equivalent of 89 million T-shirts.

<https://about.hm.com/en/sustainability/get-involved/recycle-your-clothes.html>



“WHEN YOU DROP OFF YOUR UNWANTED TEXTILES IN A H&M STORE, YOU’LL GET REWARDED WITH A VOUCHER”

RETAILERS COME SECOND IN LINE AFTER BRANDS (BUT MAYBE FIRST IN CONSUMERS' TOP OF MIND...) IN PROMOTING RE-USING, WITH SIMPLE PLASTIC BAG REDUCTION...

Because they have a special place in consumers' everyday life and experience, retailers' eco-moves generally leave a particularly strong print.



In France, the Leclerc hypermarkets stopped giving out plastic bags 20 years before the legal ban of free, single use plastic bags



In the UK, the 7 main retailers issued 83% fewer bags (over 6 billion bags fewer) in 2016 to 2017 vs. calendar year 2014, as a function of a tax on plastic bags. Asda, Morrisons, Aldi and Lidl have removed single use plastic bags from their shops in 2018 and are experimenting small plastic bags for self-service fruit and vegetables



With the help of campaign group "A Plastic Planet," Thornton's Budgens created plastic-free zones in its Belsize Park shop. Customers can pick up everything from fresh fruit/vegetables, bread and cheese, to wild game meat, including squirrel and wild boar, all free from plastic packaging.

...OR WITH ACTUAL CHANGES IN THE PACKAGING OF PRIVATE LABELS



Coop is the biggest Italian retailer. Coop claimed they saved 960 tons of plastic in 2018 by restructuring the packaging of all their private label products



AND REVERSE VENDING MACHINES ARE INCREASINGLY PRESENT IN RETAIL OUTLETS

BRAND AND RETAILERS IN CIRCULAR ECONOMY



Bottle drop: Asia drinks giant F&N launches recycling vending machines in Singapore

16-Jan-2018 By Lester Wan

Beverage manufacturer Fraser and Neave (F&N) and NTUC FairPrice supermarkets in Singapore have launched a 'reverse vending machine' to boost environmentally-friendly consumer behaviour in the city state, where household recycling rates remain stubbornly low.

[HTTPS://WWW.FOODNAVIGATOR-ASIA.COM/ARTICLE/2018/01/16/BOTTLE-DROP-ASIA-DRINKS-GIANT-F-N-LAUNCHES-RECYCLING-VENDING-MACHINES-IN-SINGAPORE >](https://www.foodnavigator-asia.com/article/2018/01/16/bottle-drop-asia-drinks-giant-f-n-launches-recycling-vending-machines-in-singapore)



Germany



Norway



USA

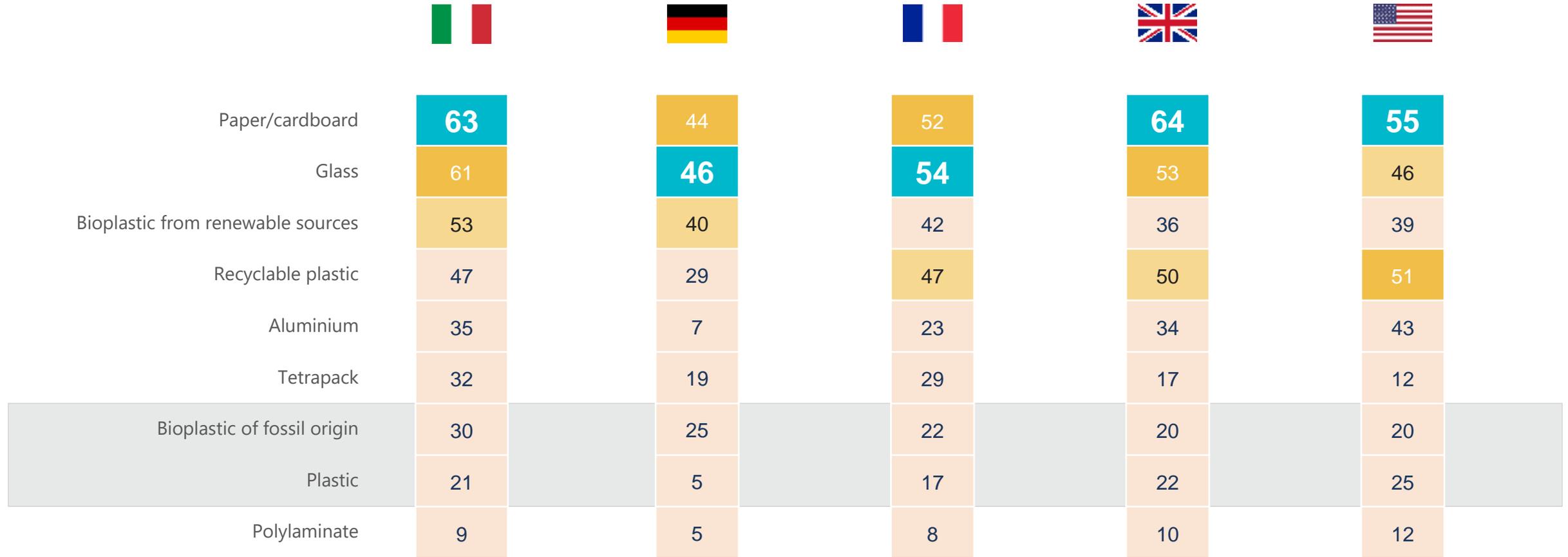


PLASTICS: THE CRITICAL POINT WHERE SUSTAINABILITY, ENVIRONMENTAL AND HEALTH SAFETY ISSUES CONVERGE

2

PLASTIC IN GENERAL IS SEEN AS THE LEAST SUSTAINABLE KIND OF PACKAGING

Q. How sustainable do you consider each of them from an environmental perspective (% “sustainable”)



3,700 CAWI interviews with adults 18-65, March 2017

© Ipsos | The Challenge of Plastic Packaging

This explains why plastic’s environmental image is so much worse than that of alternative packaging materials.

POLLUTION IS THE TOPIC MOST OFTEN ASSOCIATED WITH PLASTIC

Q. Which of the following **words would you associate** most with **plastic**?

Polluting	61
Excessively used	53
Recyclable	45
Dangerous	28
Affordable/low cost	20
Versatile	17
Useful	14
Light	14
Cumbersome	13
Poorly hygienic	5
Indispensable	4
Irreplaceable	2
Safe	2

Q. Which type of **separate collection** is more **effective**, brings more benefits?

6%



62%



13%



9%



10%

None of these

POLLUTION IS THE TOPIC MOST OFTEN ASSOCIATED WITH PLASTIC

Q. Which of the following words would you associate most with plastic?



PLASTIC STRAWS ARE A POSTER CHILD OF CONSUMPTION-RELATED WASTE

48%

**LOCAL
GOVERNMENT BANS**

Support local governments banning the use of plastic straws

75%

**ON-REQUEST
ONLY**

Support businesses choosing only to provide plastic straws on request

79%

**BIODEGRADABLE
ONLY**

Support businesses only choosing to provide biodegradable straws

41%

**ALREADY
TAKING ACTION**

Have started using fewer plastic straws because of the recent attention to the issue

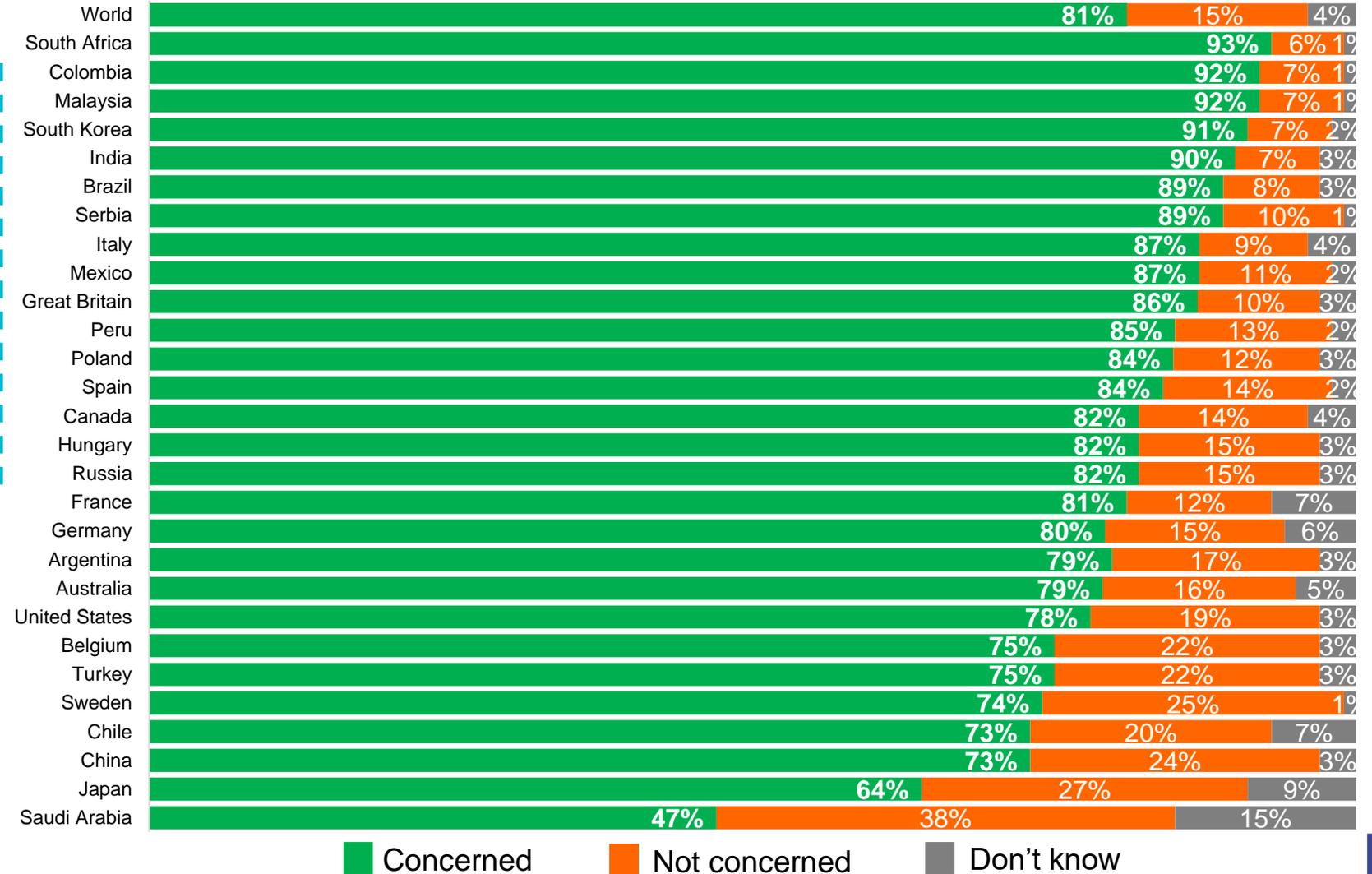
Already, four in 10 consumers report that they have started using fewer plastic straws due to recent attention on the issue, according to a recent Ipsos/Buzzfeed poll. Nearly half support local governments banning their use.

For more on the relationship between straws and microplastics, go [there](#).

THE USE OF DISPOSABLE NON-RECYCLABLE PRODUCTS/PACKAGING IS A REAL CONSUMER CONCERN

Q. Some people have recently been discussing the effects on the environment of plastic packaging, plastic bags, and other disposable objects which cannot be recycled. **How concerned**, if at all, would you say you are about this issue?

Saudi Arabia is the only exception to this global consumer consensus.



CONTINUING BAD BUZZ AROUND MICROPLASTICS FEEDS “PLASTICS-BASHING”

Microplastics in water: no proof yet they are harmful, says WHO

theguardian.com/environment/2019/aug/22/microplastics-in-water-not-harmful-to-humans-says-who-report

Plastics

This article is more than 2 months old

Microplastics in water: no proof yet they are harmful, says WHO

Report calls for more research and warns against complacency over the issue

Jonathan Watts *Global environment editor*
@jonathanwatts
Thu 22 Aug 2019 00.01 BST

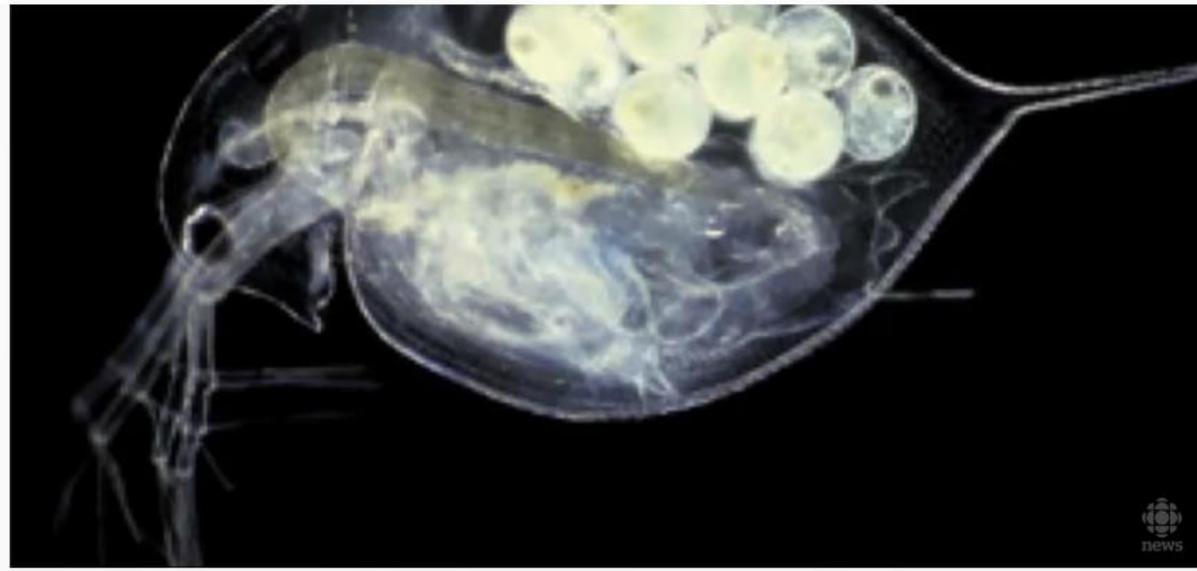


▲ Studies suggest bottled water contains minute elements of the polymers used in the container and cap. Photograph: Matt Cardy/Getty Images

Some tea bags may shed billions of microplastics per cup

youtube.com/watch?v=DVdrNCCGdK8

YouTube



CBC/Radio-Canada est une chaîne de service public canadienne. [Wikipedia](#)

Some tea bags may shed billions of microplastics per cup

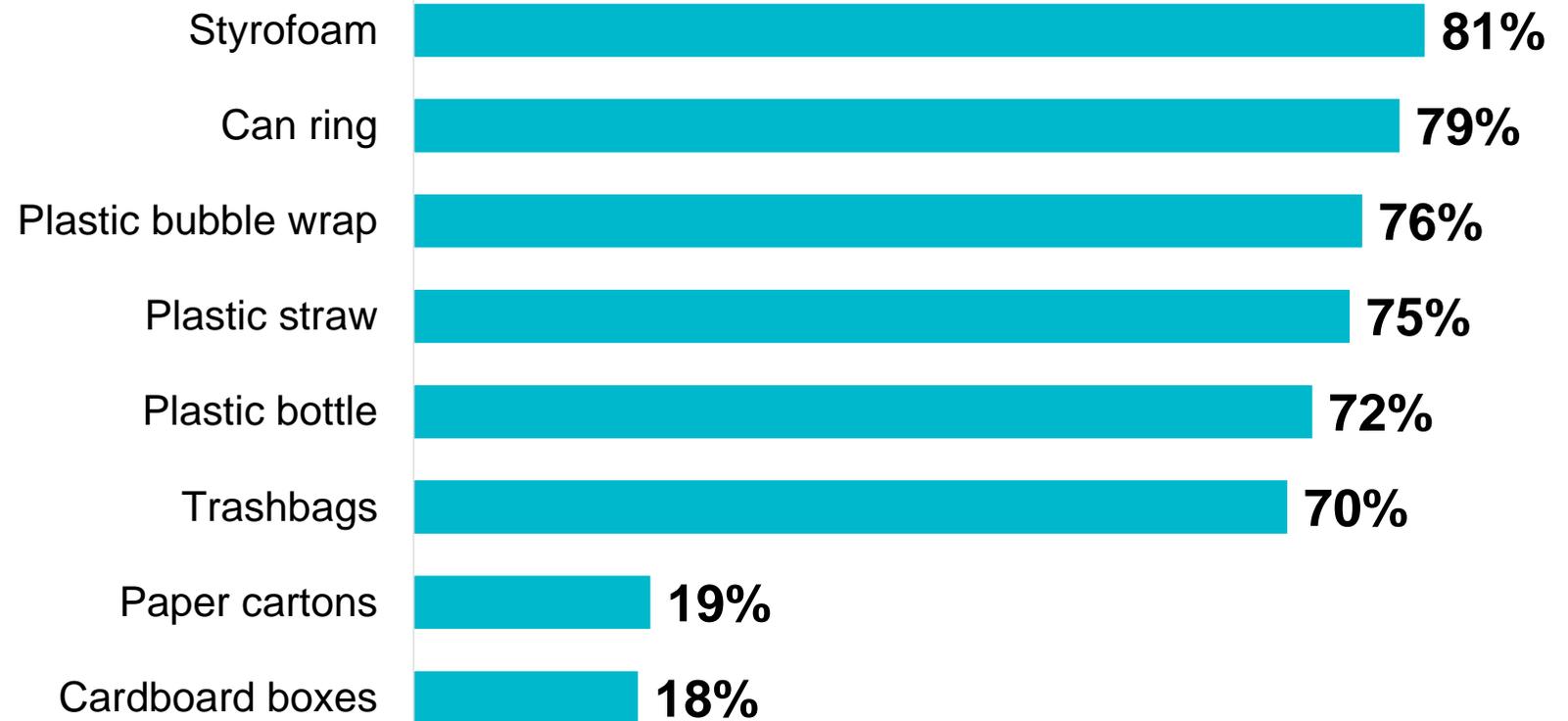
33 224 vues • 25 sept. 2019

893 33 PARTAGER ENREGISTRER

“ALL PLASTICS ARE BAD”, PEOPLE CAN HARDLY DIFFERENTIATE

Q. Below is a list of **packaging options**. Using the scale, please rate how bad or good you feel each is for the environment.

MATERIALS CONSIDERED BAD OR VERY BAD FOR THE ENVIRONMENT





PLASTICS IN ONLINE CONVERSATIONS: WHAT WE FOUND IN 12 MONTHS OF FACEBOOK, INSTAGRAM AND TWITTER POSTS

PLASTICS IN ONLINE CONVERSATION IN ENGLISH-SPEAKING MARKETS

In this section we present section an analysis covering 12 months of Facebook, Instagram and Twitter conversations in the UK, the US and Australia in 2018-19.

Main Findings:

- Looking at the USA, UK and Australia, it is clear that, relative to the size of the population in each of these markets, there is a significantly higher level of social media discussion around plastic (in relation to waste, recycling and the impact on the environment) coming from the UK. Conversely, the USA is generating considerably less discussion on social media than would be expected.
- A quick review of activity on social media around plastics shows that chatter in the UK is fairly consistent over the past 12 months. However, there are notable peaks seen in the USA and Australian data in June/July 2018. Reviewing press activity, these peaks align with announcements in the press that China has issued a ban on imported waste plastic from any outside country – with the USA being hardest hit by this ban.
- Discussion around plastics is primarily focussed on plastic bags and plastic straws across the three markets. There is approximately a third of the level of discussion around plastic bottles and about a sixth of the discussion around cups. However, this does vary notably across markets.

3.5M mentions of 'plastics' across markets in past year

USA = 2.1M actual mentions

UK = 1.2M actual mentions

OZ = 0.2 actual mentions

Index of concern based on size of population

USA
Expected level of interest
3.511M
Actual level of interest
67% **lower** than expected

UK
Expected level of interest
0.554M
Actual level of interest
46% **higher** than expected

Australia
Expected level of interest
0.210M
Actual level of interest
As expected

Population

X-mkt 418M

UK	66M
USA	327M
Oz	25M

3.5 million mentions for plastic over past 12 months across three markets, divided by x-market population of 418M = 0.0084.

Reproportion this by the population of each market can provide a level of **expected interest**. So if all markets were equally interested in plastics the number of mentions we would expect to see on social media based on country population.

Compare this to the actual mentions will provide an idea of **actual interest**.



USA

Actual level of interest

67% **lower**
than expected

Importance of the issue of “dealing with the amount of waste we generate” in our [Earth Day Poll](#)

As expected

Importance of the issue of “Over-packaging of consumer goods” in our [Earth Day Poll](#)

60% **lower**
than expected

Concern with the use of disposable, non-recyclable products in our [Earth Day Poll](#)

As expected

UK

Actual level of interest

46% **higher**
than expected

Importance of the issue of “dealing with the amount of waste we generate” in our [Earth Day Poll](#)

36% **higher**
than expected

Importance of the issue of “Over-packaging of consumer goods” in our [Earth Day Poll](#)

100% **higher**
than expected

Concern with the use of disposable, non-recyclable products in our [Earth Day Poll](#)

6% **higher**
than expected

Australia

Actual level of interest

As expected

Importance of the issue of “dealing with the amount of waste we generate” in our [Earth Day Poll](#)

9% **higher**
than expected

Importance of the issue of “Over-packaging of consumer goods” in our [Earth Day Poll](#)

As expected

Concern with the use of disposable, non-recyclable products in our [Earth Day Poll](#)

As expected

The high level of interest revealed by social media mentions of plastic in the UK matches the higher degree of concern which we have measured in this country in a survey conducted during the same month.

Note: for survey data, “expected” means “global average”.

PLASTICS IN ONLINE CONVERSATIONS

Population 418M
 USA 327M
 UK 66M
 Oz 25M

3.5M mentions of 'plastics' across markets in past year

From January 1st, 2019, an increasing number of local governments in the US are banning plastic straws in restaurants (e.g. California law bans restaurants from automatically giving out plastic straws) and significant brands are making the first move (e.g. Starbucks plans a total phasing-out in 2020). This might explain why straws are comparatively more often mentioned in the US. In a similar (but more accentuated) vein, the spread of plastic bag reduction moves or complete bans by supermarkets in the UK and even more strikingly in Australia (<https://bigthink.com/politics-current-affairs/australia-bans-plastic-bags-80-percent>) certainly explains the prominence of the plastic bag topic in these countries.



USA
2.1M mentions

UK
1.2M mentions

OZ
0.2M mentions

Plastics – Twitter, FB and Instagram / Past 12 months / UK/USA/Oz

USA plastic bags
211K mentions

22%

UK plastic bags
73K mentions

+33%

Oz plastic bags
62K mentions

295%

346,000 total
 USA expected 271K
 UK expected 55K
 OZ expected 21K

USA plastic straws
237K mentions

+4%

UK plastic straws
43K mentions

-7%

Oz plastic straws
10K mentions

-41%

290,000 total
 USA expected 227K
 UK expected 46K
 OZ expected 17K

USA plastic bottles
59K mentions

-35%

UK plastic bottles
52K mentions

288%

Oz plastic bottles
5K mentions

-29%

116,000 total
 USA expected 91K
 UK expected 18K
 OZ expected 7K

USA plastic cups
44K mentions

-19%

UK plastic cups
23K mentions

210%

Oz plastic cups
2K mentions

-50%

69,000 total
 USA expected 54K
 UK expected 11K
 OZ expected 4K

Top 12# on plastic

Plastics – Twitter, FB and Instagram / Past 12 months / UK/USA/Oz

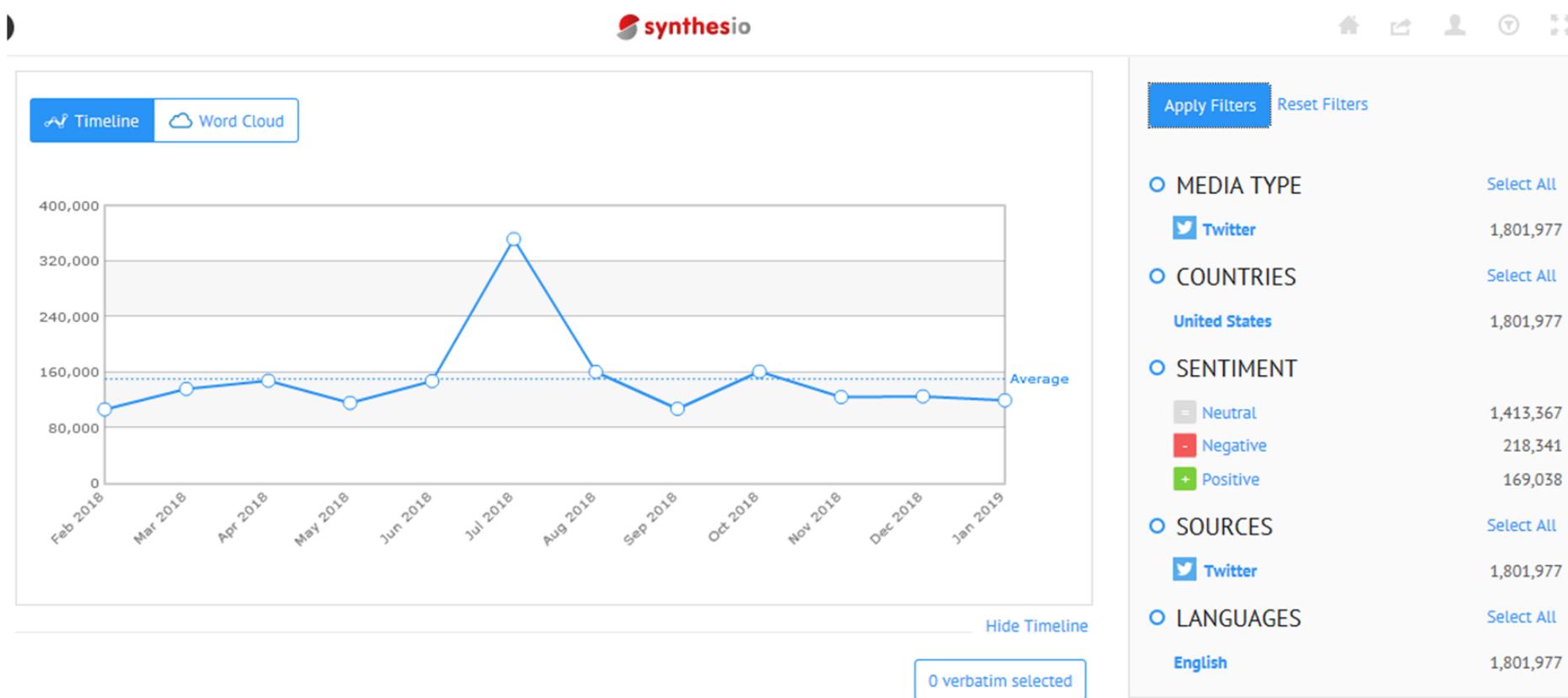
	Global	USA	UK	OZ
Position	Hashtag	Hashtag	Hashtag	Hashtag
1	#plastic	#plastic	#plastic	#plastic
2	#plasticpollution	#plasticpollution	#plasticpollution	#plasticpollution
3	#plasticfree	#breakfreefromplastic	#plasticfree	#auspol
4	#breakfreefromplastic	#beatplasticpollution	#passonplastic	#plasticfree
5	#beatplasticpollution	#plastics	#recycling	#breakfreefromplastic
6	#plastics	#plasticfree	#plastics	#environment
7	#environment	#environment	#environment	#sustainability
8	#recycling	#sustainability	#beatplasticpollution	#beatplasticpollution
9	#sustainability	#recycling	#sustainability	#waronwasteau
10	#recycle	#recycle	#breakfreefromplastic	#recycling
11	#passonplastic	#planetorplastic	#recycle	#coles
12	#pollution	#earthday	#zerowaste	#waronwaste

Several specific initiatives reach the Top 12#:

- [#breakfreefromplastic](#)
- [#beatplasticpollution](#)
- [#planetorplastic](#)
- [#earthday](#)
- [#passonplastic](#)
- [#zerowaste](#)
- [#waronwaste](#)
- And one brand, [Coles](#), in Australia

IN THE US, CHINA'S BAN ON IMPORTS OF FOREIGN PLASTIC WASTE SINCE JANUARY 2018 HIT THE HEADLINES IN JUNE/JULY OF 2018, WHEN WASTE STARTED TO PILE UP DANGEROUSLY – WHICH RELATES TO THE PEAK SEEN IN COMMENTS ON PLASTIC/S ON SOCIAL MEDIA

(Plastic OR plastics) NOT ("plastic surgery" OR "plastic surgeon*" OR "plastic figurine*" OR "Plastic molding" OR Barbie)
 USA – Twitter, Facebook,
 01/02/18 – 31/01/19



On January 1st, 2018, China issued a new [ban on imported waste plastics](#) from any outside country. This was done as a part of their ongoing initiative to reduce pollution, as the recycling of imported waste can result in the release of unwanted pollutants into the environment. Of the many countries affected by this ban, the United States may be hit the hardest.



#PLASTICFREEJULY MIGHT HAVE HAD A SPECIAL BUT EPHEMERAL IMPACT ON MENTION TRENDS IN AUSTRALIA

(Plastic OR plastics) NOT ("plastic surgery" OR "plastic surgeon*" OR "plastic figurine*" OR "Plastic molding" OR Barbie)
 Australia – Twitter, Facebook,
 01/02/18 – 31/01/19



synthesio

Apply Filters Reset Filters

- MEDIA TYPE: Twitter (148,744)
- COUNTRIES: Australia (148,744)
- SENTIMENT: Neutral (113,266), Negative (20,950), Positive (14,350)
- SOURCES: Twitter (148,744)
- LANGUAGES: English (148,744)

PLASTIC FREE JULY

Join the challenge and 'Choose To Refuse' single-use plastic during July.

Imagine a world without plastic waste. That's our mission - to build a global movement that dramatically reduces plastic use and improves recycling, worldwide.

Will you join us and give up single-use plastic this July?

YES, I will sign up for the challenge!

CHOOSE TO REFUSE SINGLE USE PLASTIC PLASTICFREEJULY.ORG

148,617 verbatim between 01/02/2018 and 31/01/2019 (0.542s)



RECYCLABILITY

AS A SOLUTION... AND AN

ISSUE

3

What are people searching for on Google about 'Plastics'

Answer the public

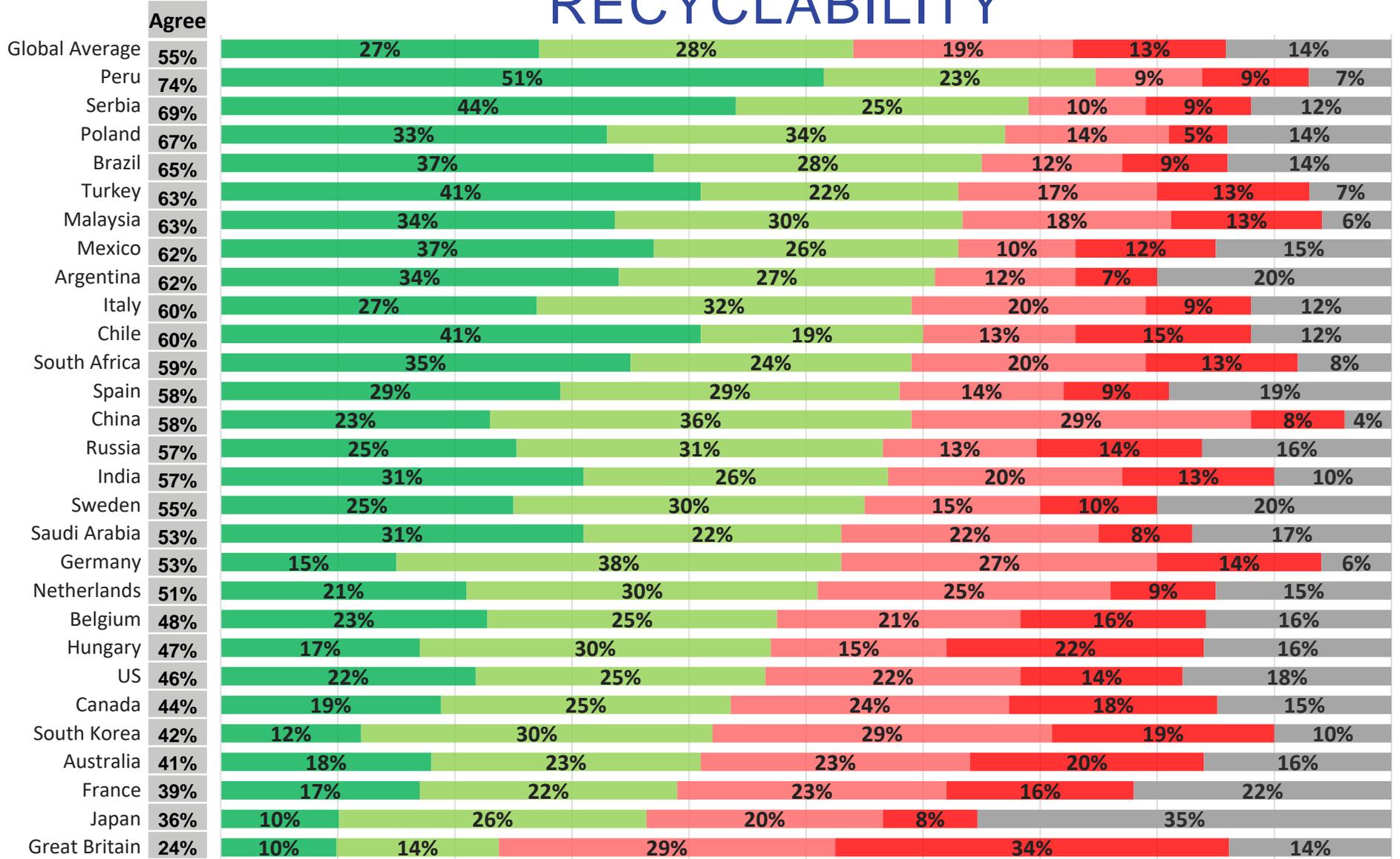
	USA	UK	Australia
Which	Plastics can be recycled	Plastics can be recycled	Plastics can be recycled
Where	Areas where plastics are used	Plastics come from	Plastics come from
Can	Plastics be recycled	Plastics be recycled	Plastics be recycled
What	Plastics can be recycled	Plastics can be recycled	Plastics are bpa free
When	Plastics invented	Plastics invented	Plastics invented
Are	Plastics biodegradable	Plastics biodegradable	Plastics biodegradable
How	Plastics are made	Plastics are made	Plastics are made
Why	Plastics are replacing metals in industries	Plastics are bad	Plastics should be banned
Will	Plastics be banned	Plastics be banned	Plastics be banned

A review of what the general public are searching for on Google with regard to plastics highlights that there are many questions from people about whether plastics can be recycled and which plastics can be recycled

AWARENESS OF PLASTICS' RECYCLABILITY

Q. Do you agree or disagree with the following statement?
All plastics can be recycled

The British are, by far, the most aware of the limits of recycling, with only a quarter (24%) believing that all plastics can be recycled, compared to a global average of 55% and more than two-thirds in Poland (67%), Serbia (69%) and Peru (74%), the latter two being countries where only a minority consider local recycling rules to be clear.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't know



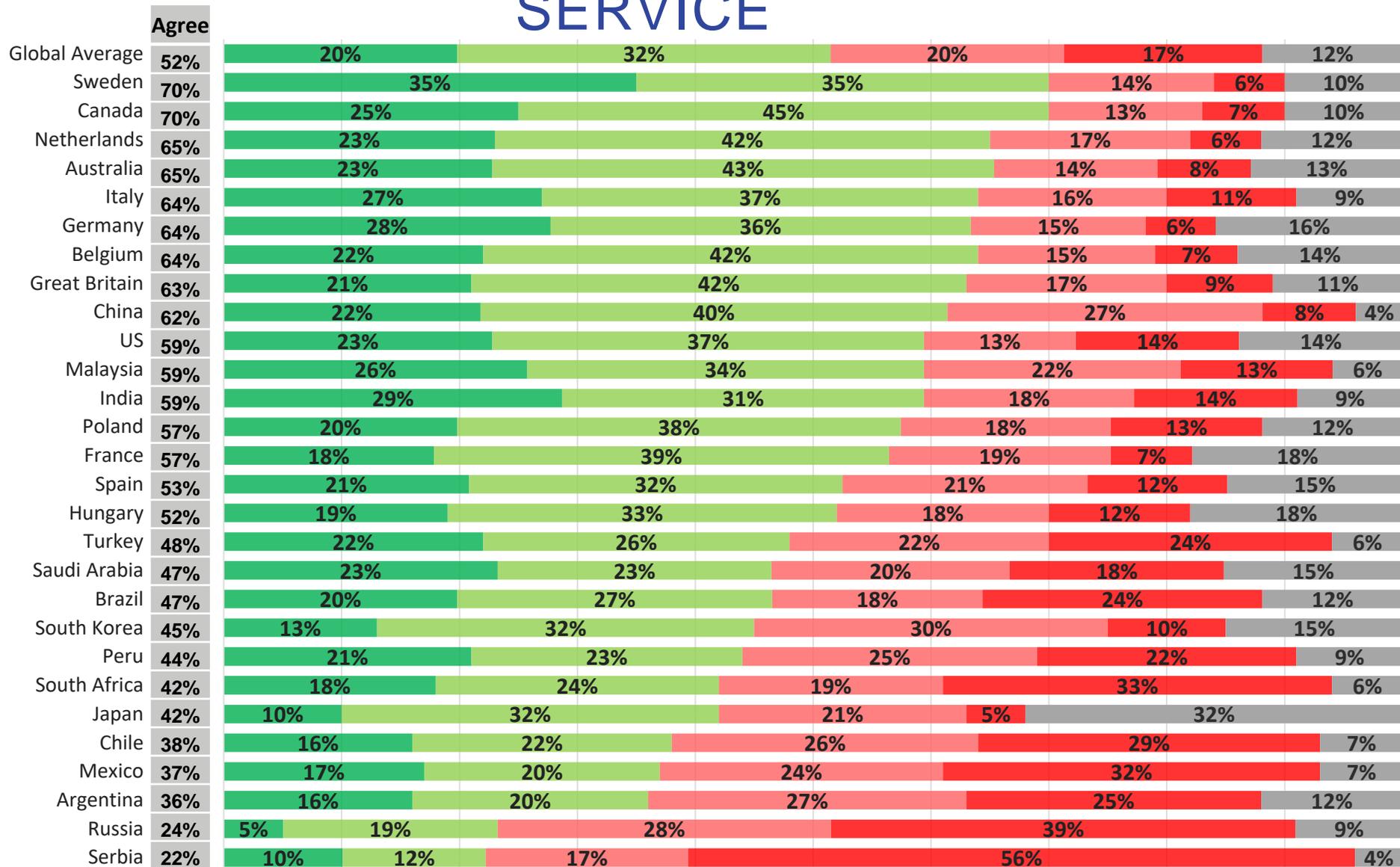
QUALITY OF LOCAL RECYCLING SERVICE

Q. Do you agree or disagree with the following statement?

The recycling service for household waste is good in the area where I live

We observe big variations around the world in assessments of the local household recycling service in the area they live. In Russia and Serbia, less than a quarter are positive (24% and 22% respectively), while in Sweden and Canada 70% agree that the facilities in place are in good shape.

In most of the emerging countries surveyed, satisfaction levels are under 50%.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't know



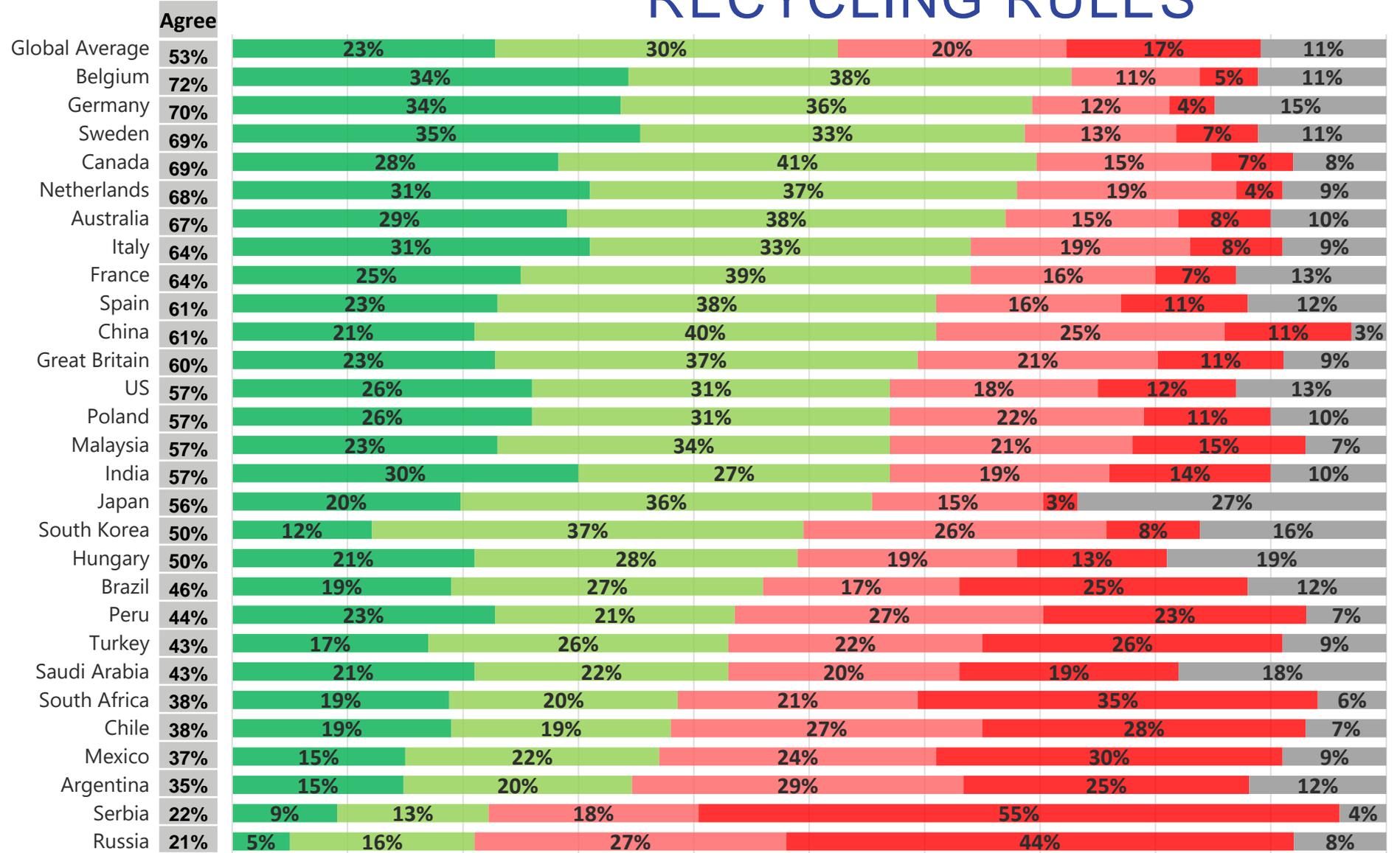
CLARITY OF LOCAL RECYCLING RULES

Q. Do you agree or disagree with the following statement?

The recycling rules for household waste are clear in the area where I live

A similar variation can be seen when it comes to the clarity of the rules for household recycling locally; they are rated particularly highly by people living in Belgium and Germany (72% and 70% respectively) and rather less so in Serbia and Russia (22% and 21%).

Once again, people in emerging countries are generally less likely to find these rules clear.



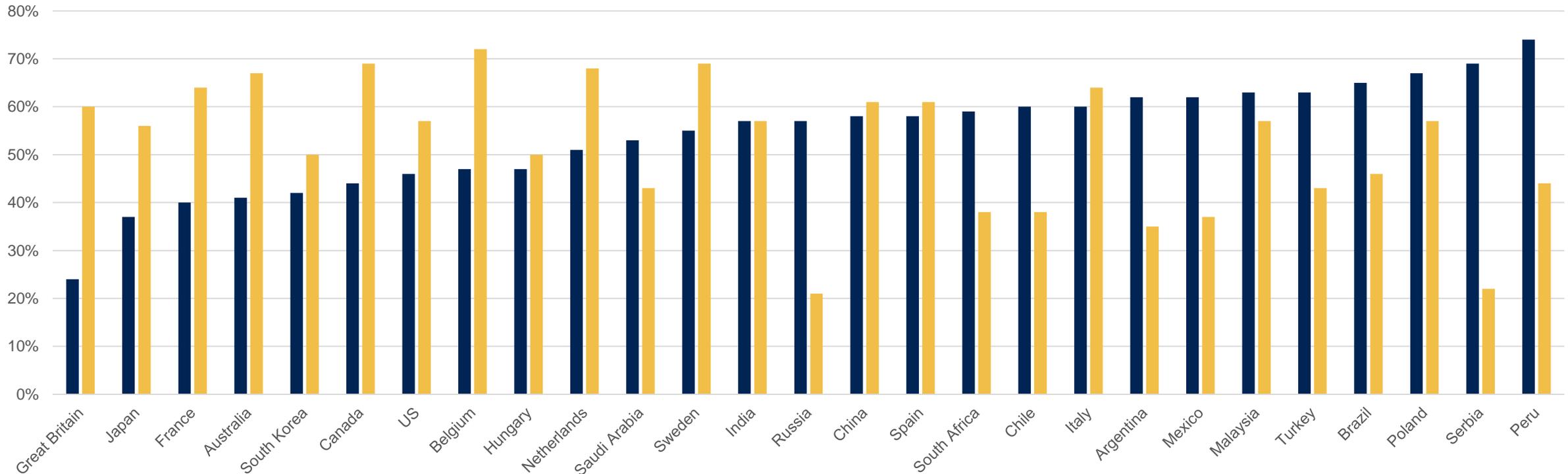
Strongly agree Tend to agree Tend to disagree Strongly disagree Don't know



PEOPLE ARE GENERALLY LESS LIKELY TO BELIEVE THAT ALL PLASTICS CAN BE RECYCLED WHERE INSTRUCTIONS ARE CLEAR

But where rules are found to be clear, people know better which kinds of plastic can be recycled and which ones can't

Agree (%)



■ All plastic can be recycled :
 ■ The recycling rules for household waste are clear in the area where I live :
 Correlation coefficient = -0,483707113

RECYCLABILITY IS THE MOST SALIENT ASPECT OF PRODUCT SUSTAINABILITY

Q. Which are the **features** which better describe a **sustainable product**?

48%

RECYCLABLE in all its parts

46%

Manufactured respecting the **HIGHEST ENVIRONMENTAL STANDARDS**

44%

Made with **CLEAN ENERGY**

36%

Health, does **NOT HARM MY HEALTH**

27%

NO CRUELTY WITH ANIMALS

23%

RESPECTING laws/regulations

22%

NOT ALTERING ECONOMIC BALANCE in favour of manufacturer

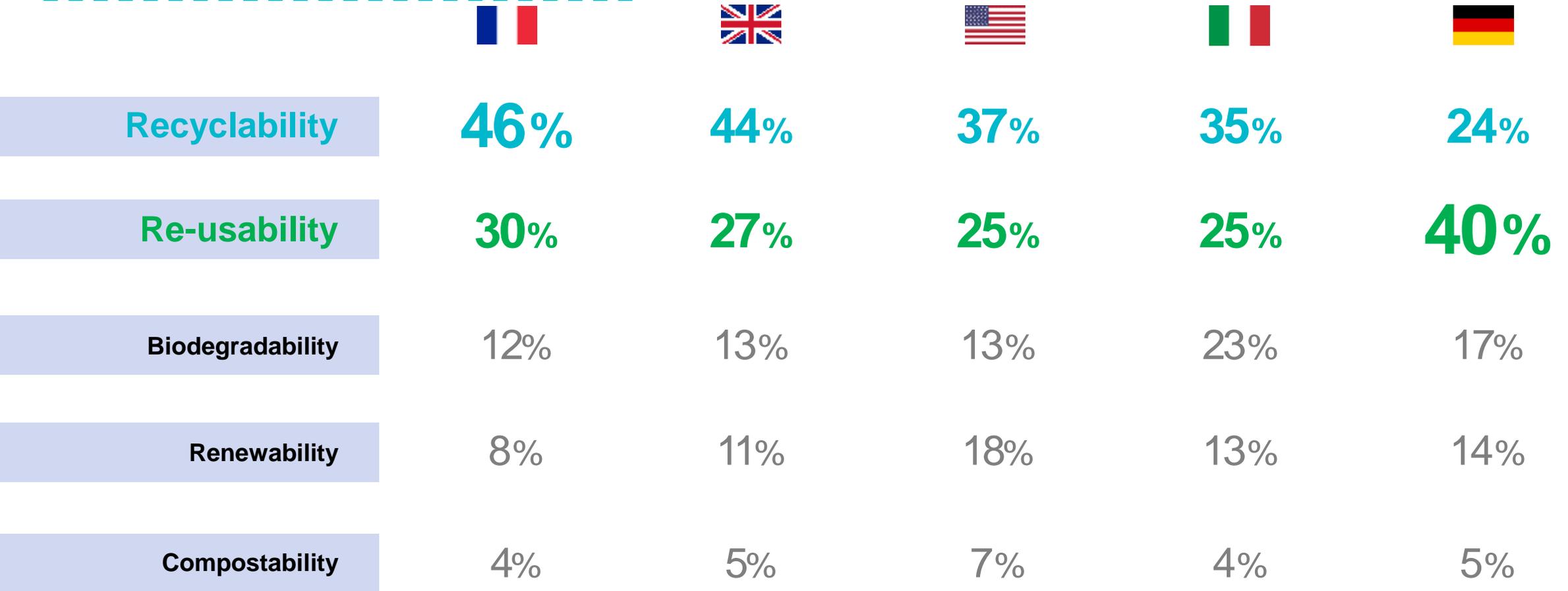
18%

All people involved in the process are **CORRECTLY REMUNERATED**

Recyclability is one of the most easily recognisable features of sustainability...

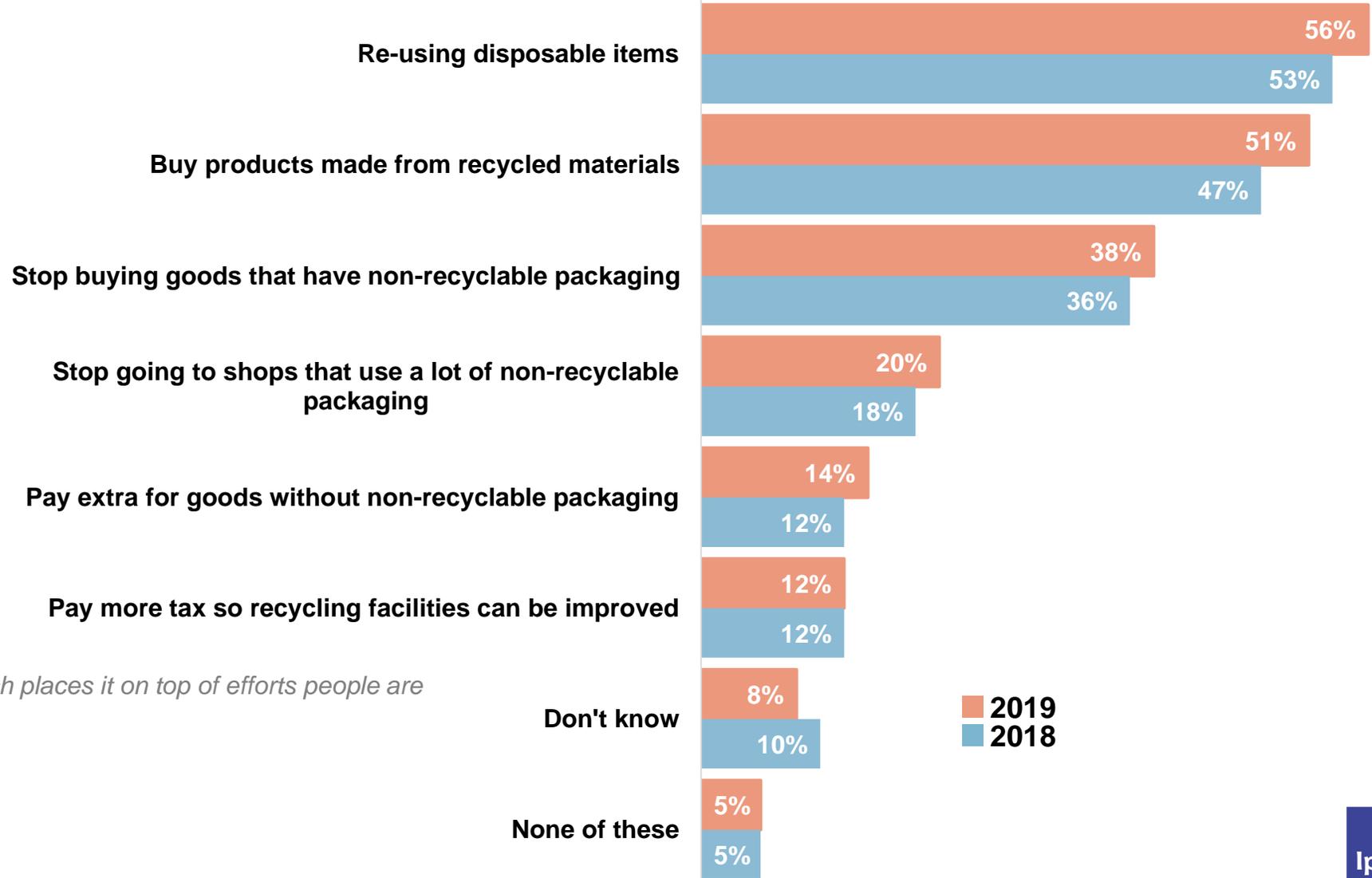
RECYCLABILITY AND RE-USABILITY MATTER

How do consumers **define sustainable packaging?**



RE-USING DISPOSABLE ITEMS AND BUYING RECYCLED MATERIALS ARE THE ACTIONS WHICH CONSUMERS ARE MOST READY TO TAKE

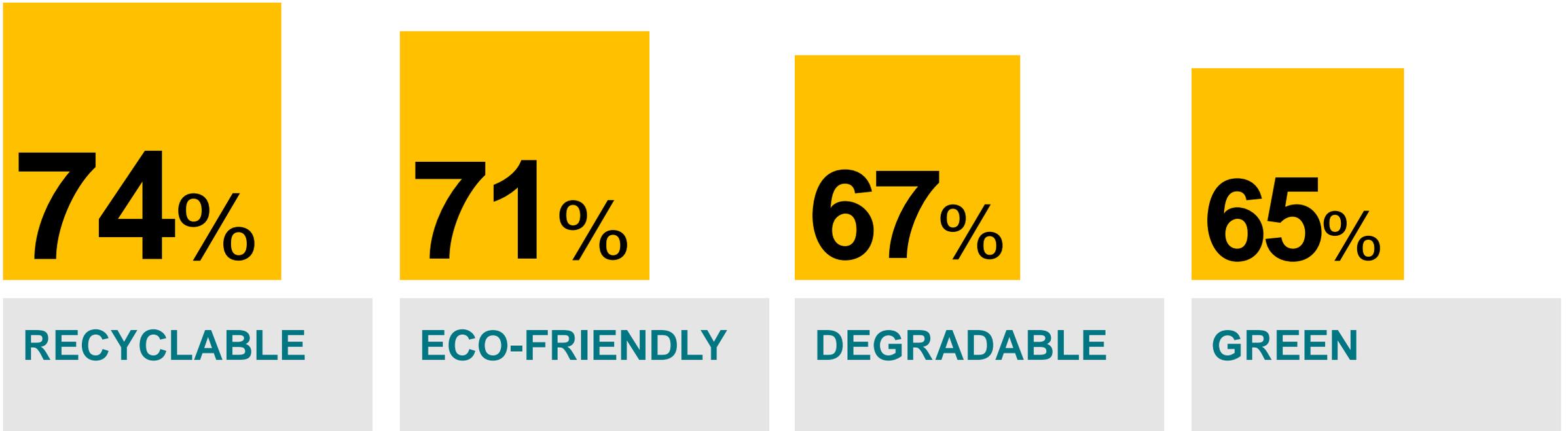
Q. Which, if any, of the following would you **personally do to reduce the problems** caused by unnecessary use of plastic and packaging **that cannot be recycled?**



And re-use is not felt as too demanding, which places it on top of efforts people are most ready to make.

...YET ALL PACKAGING SUSTAINABILITY CLAIMS ARE CREATED EQUAL! BUT SHOULD THEY BE? CONSUMERS SEE A WIDE RANGE OF CLAIMS AS ESSENTIALLY EQUALLY TRUSTWORTHY. IS IT TIME FOR ENFORCED DEFINITIONS?

Q. When you see the following **terms on grocery food packaging** about their impact on the environment, how do you compare that packaging to food packaging that doesn't use these phrases? (**Better net**)



Recyclability would be a slightly more credible and thus trustworthy claim than biodegradability (which is harder to believe).

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Ipsos surveys conducted for [What the Future: Food](#).

Source: Ipsos survey conducted between Oct. 10 and 12, 2018 among 2,010 adults in the U.S.



BECAUSE THERE IS STILL A LOT OF CONFUSION

I believe everything I place in the recycling bin **is able to be recycled** and repurposed

I only recycle the **products I know for sure can be recycled**, and throw anything questionable away

58%

48%

There is a persistent lack of clarity in recycling rules, particularly in the US.



NEARLY 2 OUT OF 3 BELIEVE PIZZA BOXES CAN BE RECYCLED

A: **Pizza boxes** are made from corrugated cardboard, however the cardboard becomes soiled with grease, cheese, and other foods once the **pizza** has been placed in the **box**. Once soiled, the paper cannot be **recycled** because the paper fibers will not be able to be separated from the oils during the pulping process.



Frequently Asked Questions: Contamination | Land, Buildings & Real ...

<https://lbre.stanford.edu/...recycling/frequently.../frequently-asked-questions-contaminati...>



THUS THERE IS STILL WORK TO DO TO MAKE RECYCLING MORE EFFICIENT...

AGREE WE NEED TO BE MORE DILIGENT

Top 2 Box Agreement

72%

I feel we as a society need to be more diligent about recycling

70%

I feel communities need to better communicate recycling guidelines

66%

Recycling is something I take very seriously, I always aim to recycle as much as possible



RECYCLABILITY AS A SOLUTION... AND AN ISSUE

...AND HOW EASY IT IS TO UNDERSTAND SYMBOLS

Let's consider the **recycling symbols** manufacturers add to their packaging. **How do you interact** with those on a regular basis?

How well would you say you **understand** all the **recycling symbols** that manufacturers add to their packaging?

31%

I typically review them when I am ready to dispose of product packaging

27%

I only review them if I am unsure of how to dispose of product packaging

25%

I rarely review them at all

16%

I typically review them prior to purchasing a product

EXTREMELY WELL **12%**

VERY WELL **25%**

SOMEWHAT WELL **38%**

NOT VERY WELL **18%**

NOT AT ALL **7%**

2/3

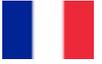
POPULATION ARE LESS POSITIVE ON THEIR UNDERSTANDING

Recycling symbols' meaning remains far from obvious.



AWARENESS OF PACKAGING SYMBOLS - SYNTHESIS...

Q. You will now see a list of symbols that are usually found on the packaging of products and we would like you to tell us **how well you know** each one.

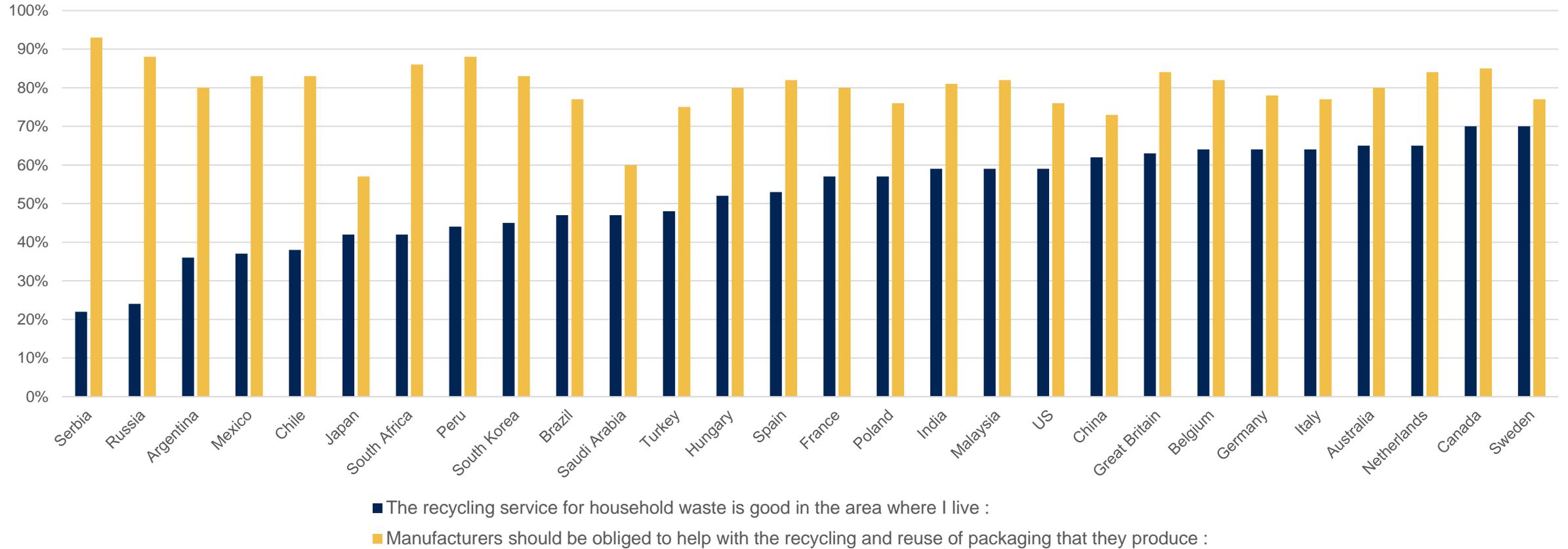
% aware					
	79	n.a.	n.a.	83	63
	60	64	21	26	23
	59	63	58	66	73
	39	32	23	27	15
	22	9	14	8	11
	20	n.a.	n.a.	31	5
	15	4	2	2	4
	12	6	11	7	8

RECYCLABILITY AS A SOLUTION... AND AN ISSUE

WHERE WASTE RECYCLING IS NOT PERCEIVED AS OPTIMAL, BRANDS MAY BE EXPECTED TO HELP

In the end, where recycling services do not help companies should take it on them to allow consumers to produce less unrecycled waste.

Agree (%)



Source: Throwing World Survey

Base: 19,515 adults aged 16-64/74 across 28 countries, online, August 2019

© Ipsos | The Challenge of Plastic Packaging

Correlation coefficient = -0,183792893

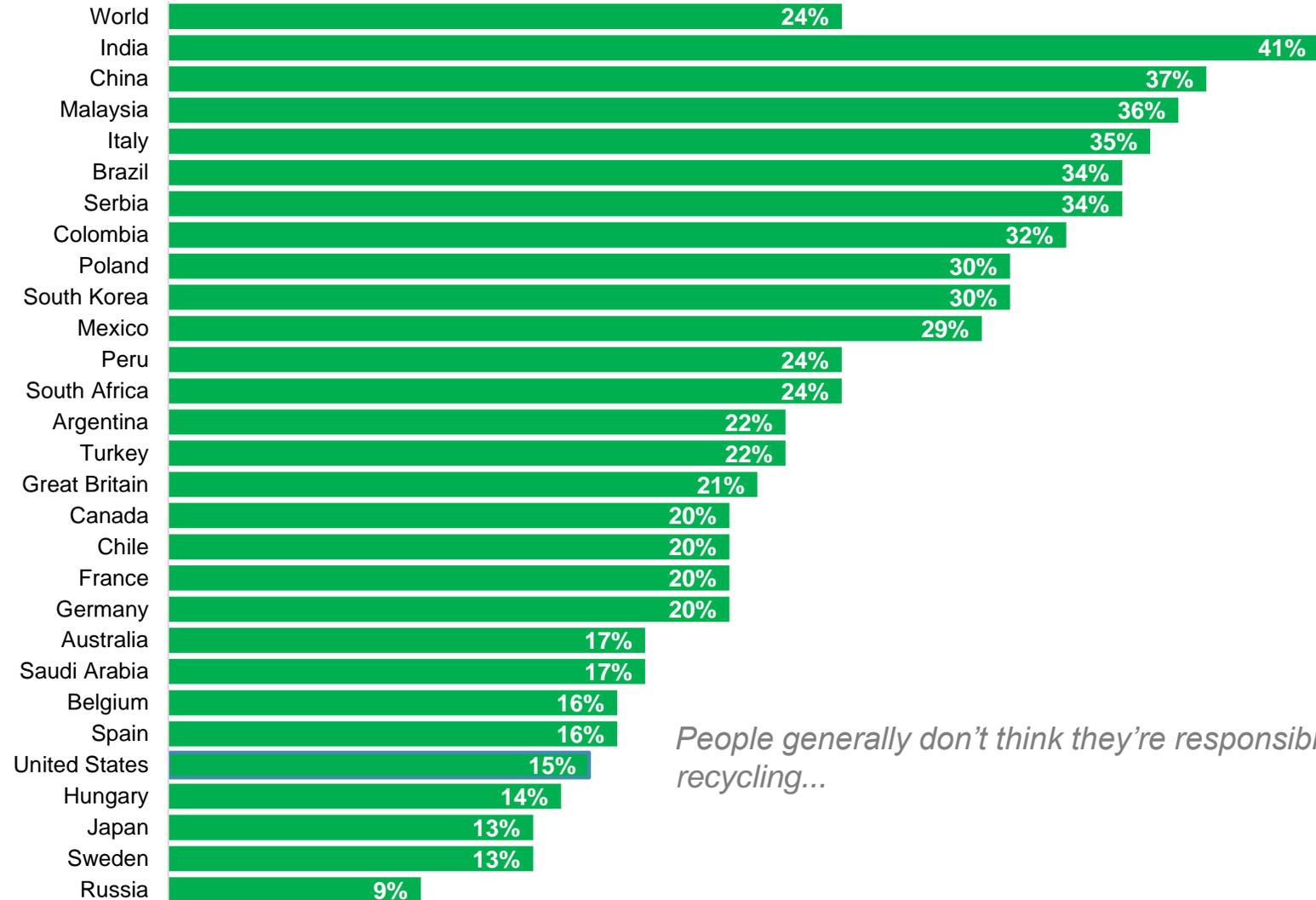
RECYCLABILITY AS A SOLUTION... AND AN ISSUE

VERY FEW CONSUMERS THINK A FINE ON HOUSEHOLDS WHO DO NOT RECYCLE ENOUGH THEIR WASTE WOULD BE AN EFFECTIVE SOLUTION...

This policy would be effective in reducing the use of non-recyclable products

Q. Which if any of the following do you think would be **effective at reducing the problems** caused by unnecessary use of plastic and packaging that cannot be recycled?

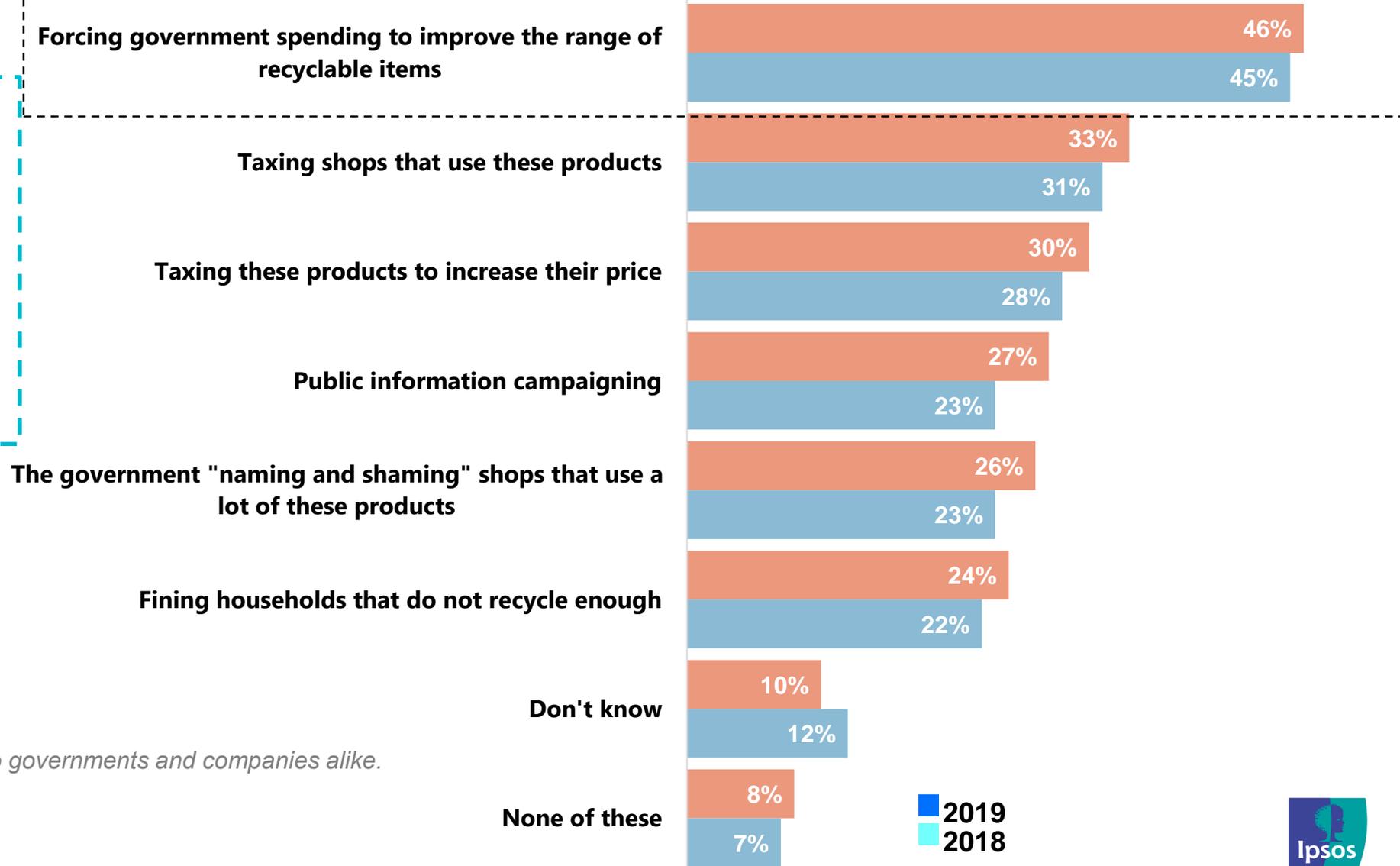
BIG FINES FOR HOUSEHOLDERS WHO DO NOT RECYCLE ENOUGH OF THEIR WASTE



People generally don't think they're responsible for inefficient recycling...

...BUT THEY THINK THAT GOVERNMENT AND COMPANIES SHOULD PAY TO SAVE THEM THIS EFFORT

Q. Which if any of the following do you think would be **effective at reducing the problems** caused by unnecessary use of plastic and packaging that cannot be recycled?



So they're willing to pass on the burden to governments and companies alike.

CONSUMERS ARE OPEN TO MORE COERCIVE LAWS... THOUGH FATALISTIC ABOUT THEIR FINANCIAL IMPACT

% agree with statements



4 to 1 think that legislation will have a positive outcome in terms of the role that brands play but with the expectation that change brings a price impact which of course is a very rational view. But price sensitivity will remain.

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ANTI-WASTE PACKAGING

A STREAM OF INNOVATION

4

RECYCLING AND REUSABLE PACKAGING ARE NOT NEW...



IRAQ
3000 BCE



EGYPT
1500 BCE



CHINA
100 BCE

*5,000 years ago the oldest existing drinking straw was used to help avoid sediment, a by-product in the fermentation of beer. It was a gold tube inlaid with precious stones. It was reusable. Interesting how one of the earliest records of human ingenuity is an a product feature to deliver better beer drinking experience.
1,500 years ago in ancient Egypt, we have the first glass jars in the early example of design and colour maybe being used to drive distinctiveness and communicate.
And in China, this time only 2,000 years ago, food was wrapped, transported, protected by treated bark from Mulberry tree. Convenient biodegradable packaging.*

...BUT THE WORLD WE LIVE IN INCREASINGLY LOOKS LIKE THIS...



TRASH

“Two sets of three bins were placed throughout an academic building. One set had no lids, while the other had a flap lid for trash, a lid with a 6-inch hole for recyclables and a lid with a narrow slit for paper. The results were astonishing: Not only did the shaped lids increase correct recycling by 34%, but the amount of contaminants, such as food, in the recycling stream collapsed by 95%.”

BAGS

In the UK there are 83% fewer plastic bags in circulation as a function of a small government tax at 6 billion plastic bags out of the system per year. Our data indicates that the 7 main retailers issued around 83% fewer bags (over 6 billion bags fewer) in 2016 to 2017 compared to the calendar year 2014 (for which WRAP reported data). This would be equivalent to each person in the population using around 25 bags during 2016 to 2017, compared to around 140 bags a year before the charge.

...GENERATING A STREAM OF PACKAGING INNOVATION MIXING CONVENIENCE WITH ECO-RESPONSIBILITY

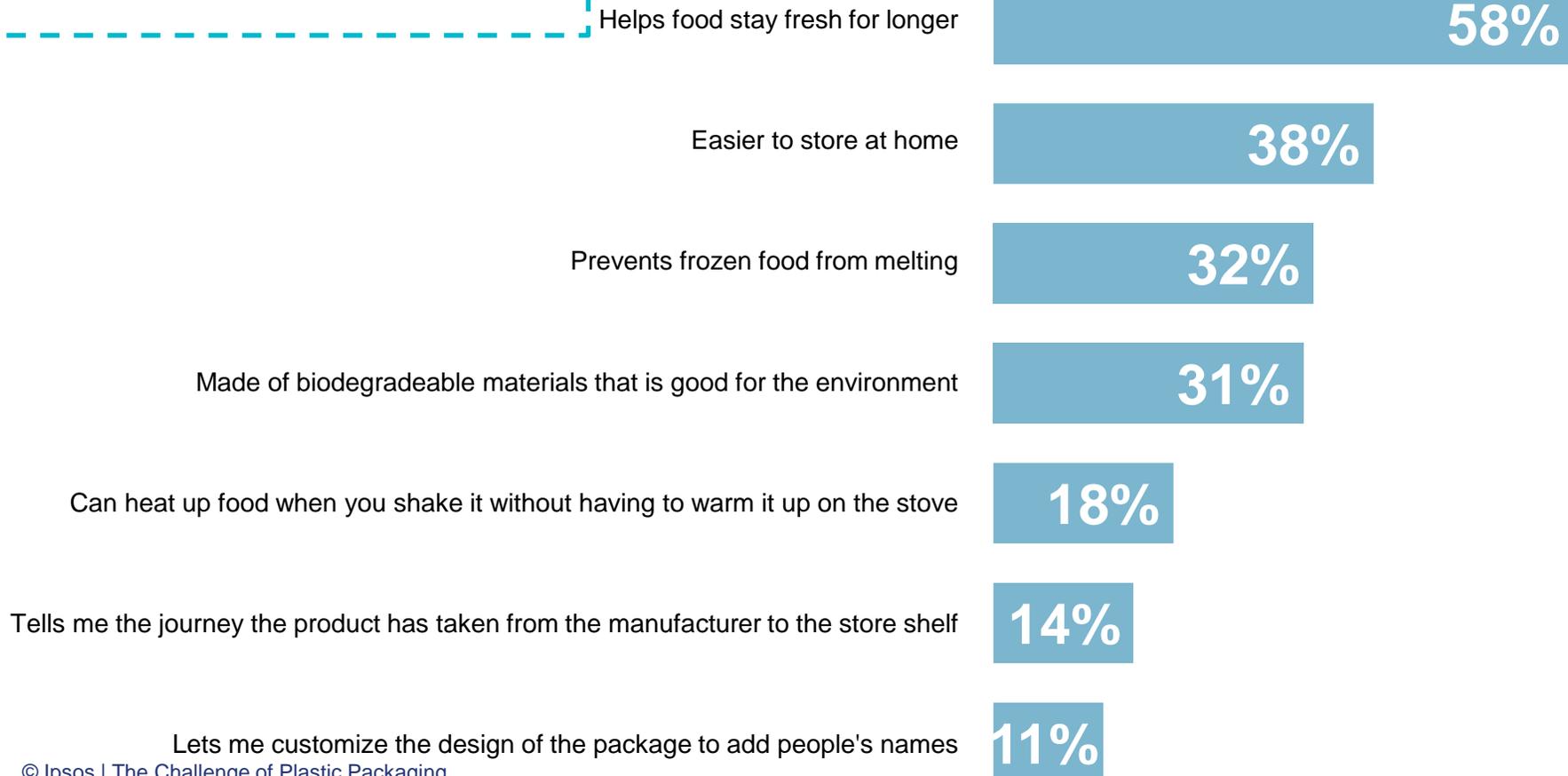


...WITHOUT FORGETTING THE BASICS

What packaging is **worth paying more** for?

Packaging has long been the intersection between tangible and intangible brand assets – an expression of the brand through design and functionality. It plays the critical role in helping protect, transport and preserve assets which themselves have only been produced at a cost in terms of material, energy, time, labor, water, plant and animal resources. In that context, it is a necessary and pragmatic investment.

In the last data point, we asked the question directly related to what people would pay more for in packaging. Clearly we have to speak in general terms but what is clear is that people are looking for functionality and if we recall on some of the initial data that we looked at, less waste is second only to global warming in terms of the public's environmental concerns. Here is an example of a functional benefit which improves the outcomes for families and also has a direct association with one of the top environmental concerns for consumers.



Typically, the energy used to make packaging is **8%** of the total energy used to produce and deliver all the products that we buy.

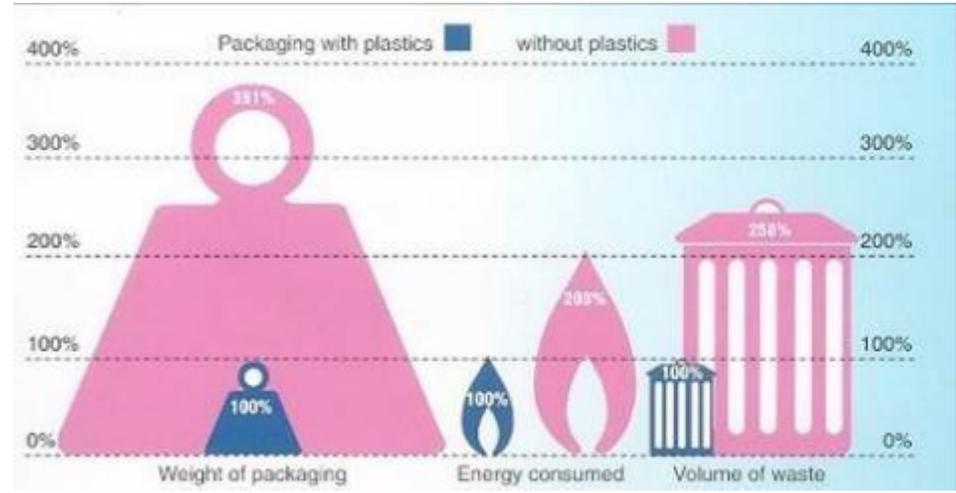
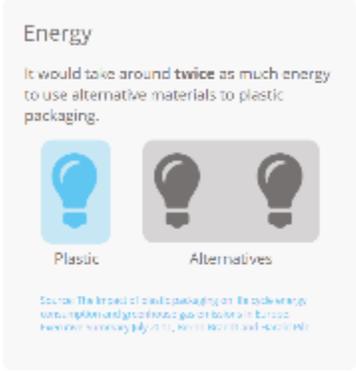
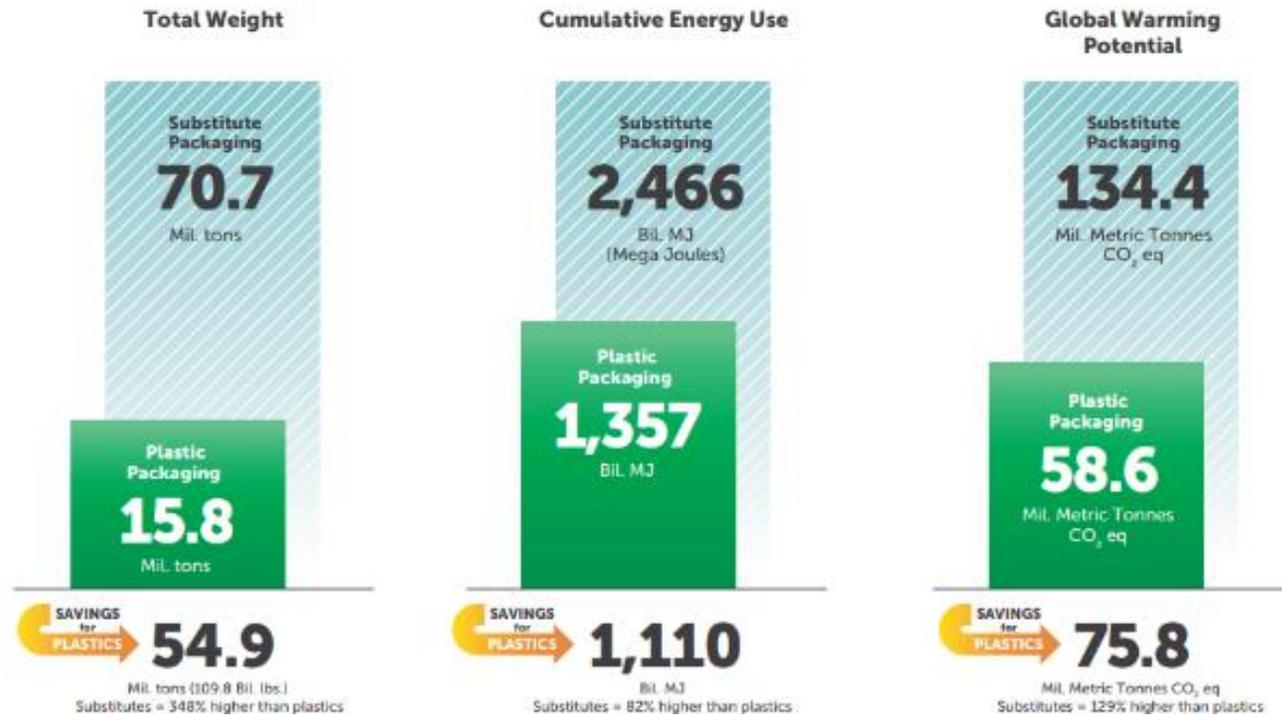


Thinking plastics, these by-products account for 4% of all the oil and gas produced.

INCPEN is a research organization, which draws together an influential group of companies who share a vision of the future where all production, distribution, and consumption are sustainable.

...ITS ENVIRONMENTAL EFFICIENCY CAN BE DEMONSTRATED

Common Plastics Packaging Helps Reduce Package Weight, Energy Use and GHG Emissions in U.S.



PLASTIC IS BAD - BUT IT WOULD BE REALLY HARD TO GET RID OF!

Q. Which are the products made with plastics you could **hardly do without**?

Water plastic bottles	33%
Transparent films for food	27%
Tetrapack for milk/juice/liquids	20%
Reusable food plastic containers	16%
Detergent plastic containers	14%
Clothing (pile, microfibers)	13%
Plastic shoppers	12%
Disposable plastic flatware	12%
Toys	11%
Plastic folders for documents	9%
Disposable food plastic containers	7%
Reusable plastic flatware	5%
None: I could without any of these	37%



HENCE A PREFERENCE FOR BIO-PLASTICS

Q. In your view, which could be the **most viable solutions** to reduce the environmental issues produced by plastics?

41%

Facilitate the use of degradable bio-plastics

26%

Exclusively permit the use of recyclable plastics

15%

Invest in technologies that would allow the degradation of plastics already circulating

10%

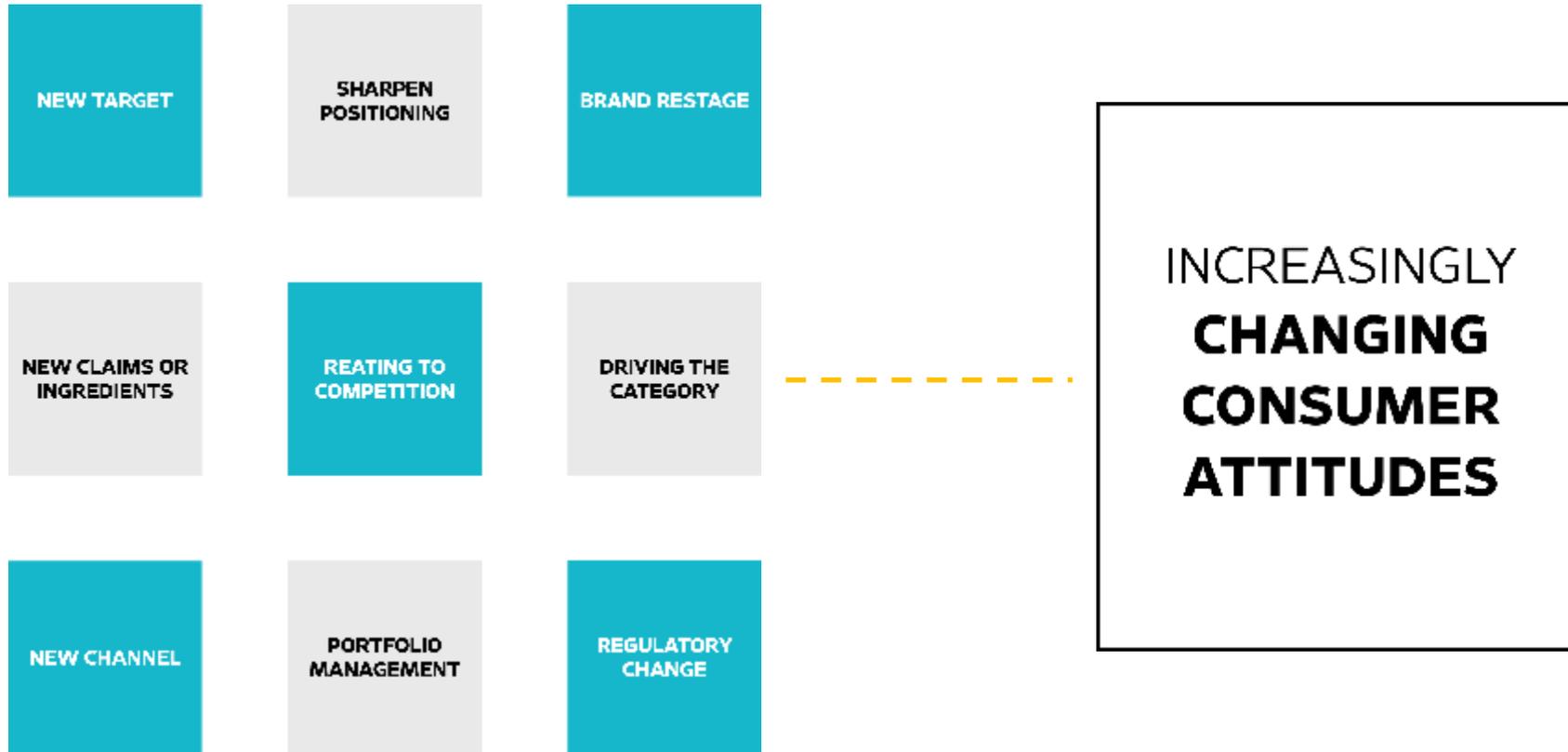
Build platforms where all the non-recyclable plastics could be stocked

8%

Totally forbid the use of plastics

PRODUCT AND PACKAGING DESIGN IS INCREASINGLY ABOUT NUDGING CONSUMER BEHAVIOR...

Why manufacturers change design



When consumers are confronted with so tough a challenge, the best thing to do is to design innovations which make it easier.

DEVELOPMENT MUST CONSIDER MULTIPLE PACKAGING “MOMENTS OF TRUTH”

Considering packaging from a consumer perspective ... increasingly there's a third moment of truth

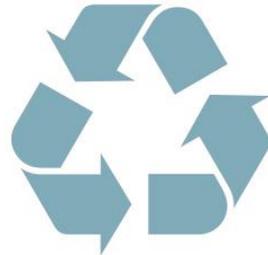
Zero moment of truth	First moment of truth	Second moment of truth	Third moment of truth
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Memory saliency

Stand out in store

At home, on the go, in-use...

Disposal and recycling



Tangible design features which trigger associations

Ability to stand out from competitive set

Physical characteristics and functionality driving usage and repeat

Pack as a positive aspect in product's sustainability

There are four moments of truth when it comes to consumers relationship to packaging.

*Zero moment of truth is the packaging design's **ability to remain salient** with consumers: what are the two or three distinctive elements of design which are reinforced and registered allowing your packaging to be immediately and automatically identifiable?*

*The first moment of truth is how well the pack performs off shelf: **does it stand out** from the competition?*

*The second moment of truth is how well the packaging **supports the product experience**.*

*And finally, the last moment of truth is the pack's ability to **contribute positively** in terms of consumer perceptions of the overall environmental impact of the packaging*

Recyclability is only one aspect of the product lifecycle, but is perceived as environmentally responsible and provides comfort for consumers that they're doing the right thing. We feel good about recycling and the large majority of people believe it makes a positive difference without necessarily knowing how. The physical act of sorting leads to reward.

THE SHORTER-TERM REALITY WILL LIKELY BE EXPERIMENTATION WITH MATERIAL AND FORMAT

NEW TECHNOLOGY



Newsworthy and consistent with corporate CSR manifesto. Same amount of product in a much reduced format.

COMPOSTABLE MATERIAL



“The ecologic packaging is the perfect articulation of our brand” John Repogle, CEO Seventh Gen. The world’s only commercially-viable paper bottles made from recycled materials.

RETHINKING A WELL-KNOWN FORMAT



Uses glue instead of plastic rings. Taps into emotive issue (ocean plastic waste). Delivers an audible click on separation.

“We can’t solve the plastic pollution crisis by substituting one kind of unnecessary single-use plastic with another,” says John Hocevar, the ocean campaigns director for Greenpeace.

There’s a compelling argument that it’s not enough to replace one bad-for-the-environment format with a format which is slightly less bad - mass disposability is the problem. The shorter-term reality, however, will likely be experimentation with material and format. If these provide demonstrably better environmental outcomes versus substitutes, they should be applauded. Although there’s less scope to deliver significant behavior change through packaging design alone, each of these examples have the potential to stand out and ultimately drive change. They are newsworthy, as well as being clear and plausible demonstrations of leadership

BRAND AND RETAILER INITIATIVES: SUSTAINABLE PACKAGING, DESIGNED FOR E-COMMERCE FULFILLMENT



Which brings us to retailers and packaging design for film and all three examples of square. So 5,000 years after straws helped beer drinkers enjoy and improve their beer, Garçon wines are delivering award-winning packaging through customers' letter boxes which in their view is summed up in these words: cost savings plus convenience plus eco-friendly plus elegance. 100% recycled PET.

The Tide example is an obvious case of working in partnership with Amazon leading to a specific new SKU which drives Amazon's agenda. Tide's new Eco Box demonstrates how genuinely new outcomes can be achieved driven by the convergence of significant drivers of change i.e. working in partnership with Amazon for streamlined fulfilment and providing consumers a sustainability benefit of reduced plastic usage. And by cannily leveraging a familiar 'wine box' format, Tide were able to clearly tap into an existing functional expectation.

Finally the dollar shave club is an example of an e-commerce native product with the associated smarts that go with that.

THE CONSUMERS' VIEW: SIGNIFICANT UPSIDE WITH 48% OF 18-34 BEING MORE FAVORABLE TO THE BRAND



Starbucks is finally drawing a line in the sand and creating a mold for other large brands to follow.

Chris Milne, director of packaging sourcing for Starbucks

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Ipsos research on 1,310 adults aged 18 - 65, November 2018

HOW CONSUMERS RESPONDED TO STARBUCKS' ANNOUNCEMENT TO STOP USING PLASTIC STRAWS AFTER 2020

	Total	Age 18-34	Age 35+
I felt much more favourably about the brand	20%	27%	16%
I felt slightly more favourably about the brand	18%	21%	16%
It did not change my impression of the brand	43%	36%	47%
I felt slightly less favourably about the brand	4%	5%	3%
I felt much less favourably about the brand	5%	3%	5%
I did not know about this announcement until now	11%	9%	12%

**THANK
YOU**

GAME CHANGERS

