THE CONVERGENCE OF HEALTH & ENVIRONMENT
Welcome to the 12th issue of the Tetra Pak Index, which focuses on health and the environment. Historically seen as two separate areas, we’re now seeing them converge within food and beverage, which is perhaps the first industry to see this trend. This report explores the drivers of this new trend, and the opportunities it presents for brands going forward.

Environment and health, the top two consumers concerns are now seeing an increasing overlap, with a direct correlation perceived between the two. Nearly three out of five consumers already think that their health and well-being are strongly affected by the environment.

Our research shows that consumers believe they carry the responsibility for both their own health and the health of the planet. There is a growing belief that today’s lifestyles, particularly what we eat and drink, have a fundamental impact on both.

There is a widespread desire among consumers to live healthier, more environmentally friendly lives. Changing food and drink habits is seen as vital to this – it’s tangible, achievable and can be personally controlled. However, the barriers to change remain, such as cost, lack of knowledge, lack of availability, and lack of credibility of options. This provides an opportunity for brands that can support consumers in their desire for change and help them overcome such barriers.

There is also a strong potential for brands to demonstrate purpose, and bring about environmental innovations in packaging, as consumers increasingly see its value and are prepared to pay more for it.

Founded on the idea that a package should save more than it costs, sustainability has always been core to how Tetra Pak operates as a business. We recently launched our Planet Positive campaign, which urges industry stakeholders to move to a low-carbon circular economy. This represents a new way of thinking, urging industry stakeholders to come together to address the pressing global environmental issues of climate and waste, taking a broader view of sustainability, going beyond recycling and reuse to include the carbon impact of raw materials and manufacturing.

To support brands in their sustainability journey, through our global research study with Ipsos, we have analysed the different levels of awareness, attitudes and engagement around both health and the environment, to reveal an important new segmentation of consumers.

Based on this, consumers can be divided into six types: Active Ambassadors, Planet Friends, Health Conscious, Followers, Sceptics and Laggards. Each group has their own distinct beliefs, values, change drivers and trusted information sources, creating clear opportunities for targeted products, messaging and more.

We explore these segments in detail in this report, including an index that outlines what each segment plans to change in the next 12 months. And we look forward to working with our customers to capture the opportunities these learnings present, both now and in the future.

ADOLFO ORIVE
PRESIDENT & CEO, TETRA PAK GROUP
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OVERVIEW: A CHANGING WORLD
In a time of marked uncertainty and turbulence, it's striking that environmental issues top the (long) list of global concerns by some margin at 63%. Moreover, most consumers think the situation is only going to get worse, with 86% believing that the focus on environmental issues will grow in the coming five years.1 Indeed, two-thirds believe that we are heading for environmental disaster unless we change our daily habits quickly.

While specific environmental issues vary slightly between countries, global warming is the most worrying issue overall. It leads in every country surveyed bar China and Saudi Arabia, which are more concerned about air pollution (with global warming the #2 worry for both). The concern about climate change is relatively consistent, though local evidence/effects of global warming may be very different. What separates the countries is the level of action being taken to lessen the negative impact, both on a personal level, and on an industrial and governmental level (see market snapshots, page 26).

In our qualitative interviews with the most environmentally aware consumers, respondents everywhere express concern about the planet’s worsening health, even in markets where there was previously limited interest. Such issues have mostly come to their attention via media, especially social media, although, again, many respondents cite examples of climate change directly affecting their own lives.

There is also a strong awareness of growing global waste challenges, notably the impact of plastic on the oceans and sealife. Respondents in Brazil, Saudi Arabia and Indonesia in particular cite the local negative environmental effects of rapid development and industrialisation.

Generally, interest in the environment is shifting rapidly from a distant, abstract concern to one that is much more concrete, urgent and, crucially, personal, as consumers increasingly see this as an issue that will impact on their own and their family’s health.

"In my own town, the river is devastated and we are suffering a lot from the lack of water."
— FEMALE, 37, BRAZIL

"Back then, we knew the rainy season was September to December, but now it’s unpredictable. We also have to use AC at home because it’s so hot now."
— FEMALE, 38, INDONESIA
After the environment, health is the biggest global concern for consumers (at 46%). These two most pressing worries have historically been treated as separate areas. But as environmental issues become more evident in daily life, consumer concerns about the direct impact on health are growing.

In fact, 59% of all consumers already think that their health and well-being are strongly affected by environmental problems. And when we look at the most worrying environmental and health concerns, we see the same factors rating highly on both: air and ocean pollution, microplastics and poor drinking water (see chart).

Consumers also see a correlation between health and the environment in the products they buy. Nearly half (47%) think that the purchase choices they make for their health will have an impact on the environment. And some see a link the other way too: 37% of consumers who plan to buy more environmentally sound products say that it will have a positive impact on their physical health, and 18% believe that it will also improve their mental health (see page 07).

The more concerned about the environment consumers become, the more health-conscious they become. For those most concerned about the environment, a full two-thirds think that their health and well-being are strongly affected by environmental issues (7% above the average).

This group also has a stronger belief that physical and mental health are major concerns for society,1 and they are substantially more likely to be willing to sacrifice convenience and to pay more for healthy products.2 Moreover, in our interviews, many also report personal experiences of health issues being caused by environmental issues and/or modern lifestyles.

While the intersection of personal and planet health is on the rise globally, the level of maturity varies between countries (see page 26). However, as our Cultural Insight Network reports show,3 a driving factor for positive change almost everywhere is youth.

Young people want and expect to be healthier and live longer than their parents. Moreover, their use of social media, their own experience of climate change and the global visibility of young activists all urge them to act more responsibly towards the environment.

THE FOOD INDUSTRY IS TO BLAME*

In our consumer interviews,4 behaviours and habits related to food – sourcing, production, preparation and packaging, and consumption – are often cited as having a negative impact on both the environment and health. Cited examples of health problems include children’s allergies, ADD and obesity, which some believe to be caused by environmental factors, such as genetically modified foods and pesticides, excess sugar, artificial additives and so on.

Health is mainly what changes consumption habits, driving consumers to choose products that are organic, locally produced and less processed, with less sugar and shorter ingredient lists. In the USA and UK particularly, some consumers see meat and dairy as having a negative impact on the environment, and their consumption has therefore decreased, with soy most frequently cited as the substitute (although children largely still drink dairy). Very few mention oats as being better for the environment than soy, suggesting that the relative environmental impact of plant-based milks is not widely understood.

However, substituting dairy seems to be a luxury for Western adults. It is not seen as a concern for Brazilian, Indonesian and Saudi consumers, for example, where dairy is regarded as more of a necessity for a healthy diet.
According to our global study, consumers now see themselves as being the most responsible for both the environment and their own health (71% and 74% respectively; see right). Government and politicians are also seen to have a high responsibility for the environment, and are widely trusted to drive change. Brands and retailers feature much lower on these scales (although other research suggests that consumers expect the industry to take action). Consumers are already changing their behaviour to include greater environmental awareness in their purchasing decisions on multiple levels (see below). The most frequently cited reason given for buying environmentally sound products is to preserve the environment for future generations, followed by doing something helpful for the community. The figures for both have grown significantly since 2017, demonstrating that consumers increasingly want to “do the right thing”.

Looking ahead, there is a widespread ambition to take action to become increasingly environmentally sound and healthier over the next 12 months. One in five say they plan to buy more sustainable packaging and more environmentally sound food and beverage products. Interestingly, while reducing negative impact is the main reason given for this, personal and health factors rate highly too.

### Tomorrow: Ambitions & Drivers for the Next 12 Months

- **Environmentally sound products**
  - **Reason**: To preserve the environment for future generations
  - **Percentage**: 41%
- **Reducing my food waste**
  - **Reason**: To feel less guilty
  - **Percentage**: 24%
- **Using reusable packaging**
  - **Reason**: To feel less guilty
  - **Percentage**: 22%

### Why will you buy more environmentally sound food/beverage products?

- **Reason**: Less negative impact on the environment
  - **Percentage**: 48%
- **Reason**: To improve my physical health
  - **Percentage**: 37%
- **Reason**: For future generations
  - **Percentage**: 34%
- **Reason**: I want to feel better about myself
  - **Percentage**: 25%
- **Reason**: To improve my mental health
  - **Percentage**: 18%

### Based Change

- **Reason**: To make a health-based change
  - **Percentage**: 41%
- **Reason**: To make an environmentally based change
  - **Percentage**: 41%
- **Reason**: To do something helpful for the community
  - **Percentage**: 40%

### Personal perspective

- **Reason**: To improve my mental health
  - **Percentage**: 48%
- **Reason**: I want to feel better about myself
  - **Percentage**: 37%
- **Reason**: To improve my physical health
  - **Percentage**: 34%
- **Reason**: To feel less guilty
  - **Percentage**: 24%

### Trusted to drive environmental change

- **Organisation**: I, myself
  - **Percentage**: 54%
- **Organisation**: The government/politicians
  - **Percentage**: 48%
- **Organisation**: Retailers
  - **Percentage**: 41%
Looking at the various drivers of change for health and environmental reasons, the key shared catalyst is greater consumption of environmentally sound food and beverage (see chart). In particular, the sweet spot is natural/organic products (see page 09), the consumption of which is considered a key trait for both healthy and environmentally sound people. Eating less meat and dairy is also associated with both, but to a lesser extent.

Looking at specific products, consumers consider 100% juice to be the healthiest (on 57%, ahead of water on 47%) and also the most environmentally sound (on 44%). White milk and coconut also rate highly on both. Generally, there is a strong correlation between health and environment for most categories, further demonstrating how intertwined these two areas are.

“Natural” is a term that particularly appeals to consumers, again perhaps because it can be closely associated with both health and environment. It rates highest for the most appealing descriptor of food and drink products on 50%. (See also boxout on page 09.)
“Natural” is a non-specific term that can have significantly different interpretations. In an Ipsos survey conducted across 28 countries, 1 consumers were asked what “natural” meant to them if communicated on food or beverage packaging. Significantly, “healthy” was in the top three most commonly associated attributes (on 43%), behind “without artificial ingredients” (52%) and “100% from nature” (44%).

Demographics make a difference: younger age groups (under 35) are more likely to associate “natural” with “organic” (34%), while older age groups (50 to 64) tend to believe it to mean “without artificial ingredients” (57%). Females are also significantly more likely to focus on the ingredients, while males are more likely to associate natural with “authentic”. Geographically speaking, there are more consistencies than differences across the markets surveyed. However, “sustainably produced” ranks particularly highly in Germany (on 23%), while “ethically produced” stands out in China (on 19%), rating higher than any other market.

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**HEALTH & ENVIRONMENT DRIVERS OF DIET CHOICES**

- **ORGANIC**: Maintain health, good for environment, prevent disease.
- **VEGAN**: Good for environment, maintain health, prevent disease.
- **VEGETARIAN**: Maintain health, prevent disease.
- **LOCALLY SOURCED**: Good for environment, maintain health, prevent disease.
- **ADDED VITAMINS**: Personal values, maintain health, manage medical condition.
- **AVOIDS SUGAR**: Maintain health, prevent disease.

**HEALTHY & ENVIRONMENTALLY SOUND TRAITS**

- **AVOIDING FAT & SUGAR**: Strongly connected with being a healthy person.
- **EATS NATURAL/Organic products**: The common ground.
- **REDUCING CONSUMPTION**: Strongly connected with being an environmentally sound person.

**WHAT DOES “NATURAL” MEAN TO CONSUMERS?**

“Natural” is a non-specific term that can have significantly different interpretations. In an Ipsos survey conducted across 28 countries, consumers were asked what “natural” meant to them if communicated on food or beverage packaging. Significantly, “healthy” was in the top three most commonly associated attributes (on 43%), behind “without artificial ingredients” (52%) and “100% from nature” (44%).

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**CASE STUDY: CLEAN LABEL YOGHURT**

There is a strong drive in the global dairy industry towards more premium, value-added products. Yoghurt is a good example. It is seeing excellent growth in many markets, notably China, and consequently brands are striving to introduce broader ranges, including varieties that meet the growing demand for more natural, additive-free “clean label” products. However, this can be a technical challenge.

Yoghurt is a special and quite sensitive product. While it can be very natural, consisting of only starter bacterial culture added to milk, over the years brands have added a variety of ingredients to control its stability, viscosity, texture, flavour and mouthfeel, and so forth.

To create clean label yoghurt, every ingredient’s properties and effects, and every processing step, must be balanced in order to get a consistent result that meets consumer needs. In general, the more sensitive and controlled the processing, the fewer additives are required, and the more natural the final product will be. For guidance on how to achieve this, Tetra Pak has produced a white paper called *Introducing Clean Label Yoghurt: Designing Alternatives to Additives*. To download this white paper, [click here](click here).
As has long been the case, cost is cited by consumers as the biggest barrier to becoming more environmentally friendly, with 36% saying that environmentally sound products are more expensive/cost too much.

That said, this is significantly less than the figure for healthy products (48%). Moreover, our environmental research shows that price is now declining as an issue for products with environmentally sound packaging specifically: down from 46% in 2017 to 42% in 2019. Other Tetra Pak research also shows that 78% of consumers are now happy to pay more for products with environmentally sound packaging, while only 41% are willing to pay more for healthier food.

Such environmentally sound packaging also positively impacts brand consideration – and this is a growing trend. 53% of consumers today say that environmentally sound packaging makes them more likely to consider a brand, up from 43% in 2017 and 39% in 2015.

However, while figures show that interest in environmentally sound products is growing, they show levels of frustration are rising too, notably around the lack of information on, or inability to distinguish, environmentally sound products. This underscores the importance of using on-package logos that consumers know they can trust: 91% of consumers say they look for environmental logos when shopping, with more than half (54%) saying they do so always or often. Again, this is a growing trend.

**BARRIERS TO ENVIRONMENTALLY SOUND LIFESTYLE**

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>It costs too much – environmentally sound products are too expensive</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>I see mixed waste in the sorted bins</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>I don’t see or have a recycling system in my neighbourhood</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>It’s too difficult to recycle</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>I want to live an environmentally sound life, but don’t know how to</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>I’m too busy to prioritise/focus on the environment</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**ENVIRONMENTAL PACKAGING & BRAND CHOICE**

<table>
<thead>
<tr>
<th>Environmentally sound packaging...</th>
<th>Percentage to left: 2017</th>
<th>Percentage to right: 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>... makes me much more likely to consider the brand</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>... makes me a little more likely to consider the brand</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>... makes no difference</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>... puts me off considering the brand</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**CASE STUDY**

**FLOW** (CANADA & USA)

A family-owned business and an innovative player in the water market, Flow is leading the way in sustainable water packaging. After a 2015 trip to Burning Man left him eager to come up with an environmentally friendly alternative to plastic water bottles, founder and CEO Nicholas Reichenbach was inspired to create Flow.

Flow is an alkaline spring water product that contains naturally occurring essential minerals and electrolytes. The water is sourced in both the USA and Canada. The Canadian source in South Bruce County, Ontario is a family-owned artesian spring dating back five generations. Flow aims to promote individual wellness through their alkaline spring water, as well as environmental health through their efforts to reduce their carbon footprint.

Committed to sustainable business practices, Flow is a B Corp-certified company. Furthermore, Flow water is packaged in 500ml and 1000ml Tetra Prisma® Aseptic packages that are made from 68% renewable materials, featuring a plant-based cap made from renewable sugarcane, and FSC™-certified paperboard. Each package is recyclable.
Packaging and specifically recyclability are pivotal to the environmental debate. Recycling is now considered the #1 trait (on 63%) of an environmentally sound person, and 39% of all consumers say they are keen to read and learn more about it.

Recyclability is also the #1 association with environmentally sound products (on 19%), although it now shares the top spot with biodegradability, which has jumped 5% since 2017. And recyclability is the third most appealing descriptor of a food or drink package overall (on 34%), after natural ingredients and no additives.

However, there are strong issues around recycling today, with lack of availability (24%) and difficulty (21%) cited as barriers. Perhaps more worrying is scepticism about whether recycling really works, with 30% saying that they see mixed waste in sorted bins, for example.

In consumer interviews, a notion prevails that efforts towards improving one’s own health are easier, more effective and more tangible than individually trying to improve the current state of the planet – which is perhaps not surprising.

In the UK and USA, environmentally sound consumers do tend to choose packaging that is recyclable, if options are available. But many now realise that some plastic items cannot be recycled, and some therefore try to find their own ways of reusing them. Others feel they are being forced to resort to throwing things in the trash – and this often makes them feel guilty.

In developing or recently developed countries, there is a lack of confidence that any individual efforts towards sustainability really count in the bigger scheme of things. This is particularly alarming since there is also a mistrust of big companies that are perceived to be profiting from people’s misfortunes.

“Some of the things that I thought were recyclable are no longer being picked up. Like the bag the newspaper comes in. I just feel awful throwing a plastic bag in the garbage, but I don’t know what else to do.”

— FEMALE, 63, USA

“We need to start doing things. We can’t consume products like we do today, we just can’t. We need to be aware of what’s sustainable.”

— FEMALE, 41, UK
CONSUMERS: SIX NEW SEGMENTS

Analysing the different levels of awareness, attitudes and engagement/behaviour around both environment and health reveals an important new segmentation of consumers. There are six types – Active Ambassadors, Planet Friends, Health Conscious, Followers, Sceptics and Laggards – each with their own distinct beliefs, values and information sources, and their own ambitions and drivers for change, creating clear opportunities for both targeted products and messaging.
ACTIVE AMBASSADORS
SEGMENT SIZE 8%

CHANGE INDEX
- 47% plan to change at least two things to live in a more environmentally sound way
- 68% plan to change their exercise or food habits or both to live more healthily

GENDER
- Male: 46%
- Female: 54%

AGE
- 16-24: 15%
- 25-34: 27%
- 35-44: 27%
- 45-54: 15%
- 55-65: 10%
- 66+: 5%

EDUCATION
- Low: 1%
- Medium low: 20%
- Medium high: 52%
- High: 26%

OVER-INDEXING COUNTRIES
- Indonesia: 11%
- India: 11%
- China: 14%
- Brazil: 12%

High engagement in all aspects of health and environment. Very willing to take action, challenge boundaries and influence others. Top score on belief that environment issues impact on health.

OVER-INDEXING FIGURES ARE HIGHLIGHTED IN RED THROUGHOUT
ACTIVE AMBASSADORS

SEGMENT SIZE 8%

LIFESTYLE
- 93% believe environmental issues have a high impact on health
- 80% actively try to influence their friends with their views
- 20% already have a fully healthy lifestyle
- 21% already have an environmentally sound lifestyle

BARRIERS

ENVIRONMENT
- Lack of waste management where I live

HEALTH
- Healthy food is not widely available where I live

Have fewer barriers since they already live a healthy/environmentally sound lifestyle

BEHAVIOUR

ENVIRONMENT
- I engage with communities that really stand for improving the environment
- I express my thoughts and beliefs around the environment on social media, blogs etc
- I actively seek new experiences with less impact on the environment

HEALTH
- I use the latest trends and findings to improve my health
- I always love to test my boundaries and experience new and exciting activities that improve my health

PRODUCT ATTITUDES

ENVIRONMENT
- Would sacrifice convenience for environmentally sound products

HEALTH
- Strongly believe that meat-based is bad for health and the environment
- Will buy more environmentally sound products, eat more organic and buy more second-hand

PRODUCT FEATURES

- Natural ingredients
- Organic
- Locally sourced

GOOD FOR HEALTH & ENVIRONMENT
- 100% juice

SOURCES FOR ADVICE/INSPIRATION

ENVIRONMENT
- NGOs, scientists, brands

HEALTH
- NGOs, scientists, school
ENGAGED AND WILLING TO TAKE ACTION ABOUT THE ENVIRONMENT.
ALSO HIGH ENGAGEMENT ON MOST ASPECTS OF HEALTH, PARTICULARLY FOR PEACE OF MIND. LESS INCLINED TO CHALLENGE BOUNDARIES, TRY NEW THINGS AND ACT AS INFLUENCERS.
### PLANET FRIENDS

**SEGMENT SIZE**  14%

<table>
<thead>
<tr>
<th>LIFESTYLE</th>
<th>PACKAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>72% believe environmental issues have a high impact on health</td>
<td>Will pay more for environmentally sound packaging</td>
</tr>
<tr>
<td>57% actively try to influence their friends with their views</td>
<td>Will use less plastic and buy more sustainable packaging</td>
</tr>
<tr>
<td>18% already have a fully healthy lifestyle</td>
<td>Will recycle more</td>
</tr>
<tr>
<td>22% already have an environmentally sound lifestyle</td>
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</tbody>
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<table>
<thead>
<tr>
<th>BARRIERS</th>
<th>PRODUCT ATTITUDES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENVIRONMENT</td>
<td>Would sacrifice convenience for environmentally sound products</td>
</tr>
<tr>
<td>Costs too much</td>
<td>Strongly believe that meat-based is bad for health and the environment</td>
</tr>
<tr>
<td>HEALTH</td>
<td>Believe unprocessed/raw is good for health</td>
</tr>
<tr>
<td>Costs too much</td>
<td>Will reduce overall consumption and reduce food waste</td>
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</table>

<table>
<thead>
<tr>
<th>BEHAVIOUR</th>
<th>PRODUCT FEATURES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENVIRONMENT</td>
<td>Recyclable packages</td>
</tr>
<tr>
<td>I am adopting ways of reducing my negative impact on the environment</td>
<td>Plant-based</td>
</tr>
<tr>
<td>I actively seek new experiences with less impact on the environment</td>
<td>Unprocessed/raw</td>
</tr>
<tr>
<td>I need to understand the impact of environmental issues before acting</td>
<td></td>
</tr>
<tr>
<td>HEALTH</td>
<td>GOOD FOR HEALTH &amp; ENVIRONMENT</td>
</tr>
<tr>
<td>Good health positively impacts my well-being: I feel less stressed</td>
<td>Oat drinks</td>
</tr>
<tr>
<td>Scientists, doctors</td>
<td>Coconut drinks</td>
</tr>
</tbody>
</table>

### SOURCES FOR ADVICE/INSPIRATION

<table>
<thead>
<tr>
<th>ENVIRONMENT</th>
<th>HEALTH</th>
</tr>
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<tbody>
<tr>
<td>NGOs, scientists</td>
<td>Scientists, doctors</td>
</tr>
</tbody>
</table>
HEALTH CONSCIOUS
SEGMENT SIZE 10%

CHANGE INDEX

- 37% plan to change at least two things to live in a more environmentally sound way
- 70% plan to change their exercise or food habits or both to live more healthily

GENDER

- Male 49%
- Female 51%

AGE

<table>
<thead>
<tr>
<th>Age</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-65</th>
<th>66+</th>
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<tbody>
<tr>
<td>%</td>
<td>20%</td>
<td>25%</td>
<td>25%</td>
<td>14%</td>
<td>9%</td>
<td>7%</td>
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</table>

EDUCATION

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Low</th>
<th>Medium low</th>
<th>Medium high</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>1%</td>
<td>20%</td>
<td>60%</td>
<td>19%</td>
</tr>
</tbody>
</table>

OVER-INDEXING COUNTRIES

- China 24%

Aware and engaged about environment, but even more so about health. Prepared to try new things, and to pay more and sacrifice convenience for healthy products. Particularly influenced by social media and forums. Follow trends, but not trend-setters.
**Health Conscious**

**Segment Size**: 10%

**Lifestyle**
- 70% believe environmental issues have a high impact on health
- 66% actively try to influence their friends with their views
- 15% already have a fully healthy lifestyle
- 16% already have an environmentally sound lifestyle
- Strong personal views about health, eg “Looking good & being healthy are strongly connected”

**Barriers**
- **Environment**: No over-indexing attribute
- **Health**: Healthy food is not widely available where I live

**Behaviour**
- **Environment**: No over-indexing attributes
- **Health**: I am using the latest trends and findings to improve my health

**Packages**
- Believe packages from renewable sources are good for the environment

**Product Attitudes**
- More willing to sacrifice convenience and pay more for healthier products
- Will buy more environmentally sound products

**Product Features**
- Organic
- Natural ingredients

**Good for Health & Environment**
- Soy drinks
- White milk

**Sources for Advice/Inspiration**
- **Environment**: Social media/forums, politicians
- **Health**: Social media/forums
Followers

Segment Size 31%

Change Index

- 29% plan to change at least two things to live in a more environmentally sound way
- 67% plan to change their exercise or food habits or both to live more healthily

Gender

- Male 51%
- Female 49%

Education

- Low 2%
- Medium low 27%
- Medium high 54%
- High 17%

Age

<table>
<thead>
<tr>
<th>Age</th>
<th>16-24</th>
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<td>%</td>
<td>18%</td>
<td>24%</td>
<td>21%</td>
<td>18%</td>
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Over-indexing countries

- South Korea 52%
- Indonesia 36%

Engage enough with health and environmental issues to feel guilty about both, but not inclined to change behaviour or try new things. Need to know more and be persuaded and energised to act. Sizeable mainstream cohort with interesting potential.
**FOLLOWERS**

**SEGMENT SIZE 31%**

**LIFESTYLE**
- 59% believe environmental issues have a high impact on health
- 40% actively try to influence their friends with their views
- 12% already have a fully healthy lifestyle
- 16% already have an environmentally sound lifestyle

**BARRIERS**
- **ENVIRONMENT**
  - Costs too much

**HEALTH**
- Costs too much
- Healthy food is not tasty

Want to live with minimal impact on the environment, but not yet actively doing so. Feel guilty about both health and environment. Aware that a change is needed. Claim they will start by exercising more and taking up yoga/mindfulness

**BEHAVIOUR**
- **ENVIRONMENT**
  - I randomly make choices that are good for the environment – but only when it suits me
  - I need to understand the impact of environmental issues before acting

**PRODUCT ATTITUDES**
- Prioritise avoiding products that are bad for health over buying products that are good for health
- Strongly believe that meat-based is bad for both health and the environment
- Will eat more healthily, reduce food waste and decrease overall consumption

**PACKAGE**
- Believe that reused packs might be bad for health and the environment

**PRODUCT FEATURES**
- **ENVIRONMENT**
  - Seasonal food
  - Fairtrade

**GOOD FOR HEALTH & ENVIRONMENT**
- Packaged water

**SOURCES FOR ADVICE/INSPIRATION**
- **ENVIRONMENT**
  - TV/radio or none

**HEALTH**
- TV/radio or none
SCEPTICS
SEGMENT SIZE 18%

CHANGE INDEX
- 19% plan to change at least two things to live in a more environmentally sound way
- 55% plan to change their exercise or food habits or both to live more healthily

GENDER
- Male 55%
- Female 45%

AGE
- 16-24: 18%
- 25-34: 23%
- 35-44: 20%
- 45-54: 17%
- 55-65: 11%
- 66+: 11%

EDUCATION
- Low: 2%
- Medium low: 30%
- Medium high: 49%
- High: 18%

OVER-INDEXING COUNTRIES
- US: 30%
- UK: 25%
- Saudi Arabia: 20%

Lower engagement on both health and environmental issues. Cautious about technology and social media. Not inclined to challenge boundaries or try new things. Will only change when it fits their lifestyle.
**Sceptics**

**Segment Size** 18%

**Lifestyle**
- 51% are tired of the fuss about the environment
- 34% actively try to influence their friends with their views
- 16% already have a fully healthy lifestyle
- 13% already have an environmentally sound lifestyle

**Barriers**
- **Environment**
  - “They put my sorted waste together anyway so why bother?”
- **Health**
  - A healthy lifestyle would be too boring
  - Healthy food is not tasty

More than average say they don’t care about the environment or don’t believe their lifestyle affects it. But many say that a healthy lifestyle is important. Score low on changes for the future.

**Behaviour**
- **Environment**
  - I go with the flow and do what my friends do
  - I randomly make choices that are good for the environment – but only when it suits me
  - I am aiming at going back to basics and detaching from technology and social media

**Packages**
- Believe that reused packs might be bad for health

**Product Attitudes**
- Prioritise avoiding products that are bad for health over buying products that are good for health
- Believe new technology is a risk for health and plan to reduce time online
- Believe meat-based food is good for health

**Product Features**
- Locally sourced
- Seasonal food
- Vitamins-added

**Good for Health & Environment**
- Cheese

**Sources for Advice/Inspiration**
- **Environment**
  - Retailers, family/friends, politicians, doctors – or none
- **Health**
  - Retailers, politicians, family/friends
LAGGARDS
SEGMENT SIZE 18%

CHANGE INDEX
16% plan to change at least two things to live in a more environmentally sound way
42% plan to change their exercise or food habits or both to live more healthily

GENDER
Male 52%
Female 48%

AGE
16-24 20%
25-34 31%
35-44 25%
45-54 15%
55-65 5%
66+ 3%

EDUCATION
Low 4%
Medium low 23%
Medium high 50%
High 22%

OVER-INDEXING COUNTRIES
Saudi Arabia 46%
India 22%
Brazil 20%

Low knowledge of/interest in all aspects of health and environment. Sceptical of new technology. Claim willingness to take action and challenge boundaries, but score low on planned changes for the future and high on “live for today”. Actively try to influence others.
LAGGARDS
SEGMEN T SIZE 18%

LIFESTYLE
42% believe environmental issues have a high impact on health
57% actively try to influence their friends with their views
12% already have a fully healthy lifestyle
8% already have an environmentally sound lifestyle

BARRIERS
ENVIRONMENT
They put my sorted waste together anyway
I’m too busy to focus on the environment
I don’t know how to be more environmentally sound

HEALTH
A healthy lifestyle would be too boring
I want to live a healthy life but don’t know how
I have more focus on my children’s health than mine

Above average say they don’t care about the environment and that healthy lifestyle unimportant

BEHAVIOUR
ENVIRONMENT
I go with the flow and do what my friends do
I randomly make choices that are good for the environment – but only when it suits me
I am aiming at going back to basics and detaching from technology and social media

HEALTH
No over-indexing attributes

PACKAGES
No over-indexing attributes

PRODUCT ATTITUDES
New technology is a risk for personal health
Strongly believe that meat-based food is good for health and the environment

PRODUCT FEATURES
No over-indexing attributes

GOOD FOR HEALTH & ENVIRONMENT
Vitamins-added
Meat-based

SOURCE S FOR ADVICE/INSPIRATION
ENVIRONMENT
Retailers, brands, family/friends, politicians, doctors, school – or none

HEALTH
Retailers, politicians, brands, school – or none
WHERE THEY ARE
A GLOBAL VIEW
WHERE THEY ARE
FIVE MARKET SNAPSHOTs

**BRAZIL**

The environment holds a vital place in Brazilian culture, due to the vast scale and biodiversity of nature here. Environmentalism has long been strong and multi-sectoral, including NGOs, business, arts, education and brands, reflected in the high percentage of Active Ambassadors and Planet Friends here. Meanwhile, modernisation of society has introduced more lifestyle-related illnesses, driving greater interest in health and wellness.

There is a strong beauty aspect to health, with a high focus on sculpting the body. Supplements and formulations that claim to be “light” or “slimming” are important, and cosmetic surgery is relatively commonplace.

The Amazon in particular offers a strong link between health and the environment, as it is such a potent source of medical and wellness ingredients, as well as being “the world’s lungs”. Its deforestation is driving rising concern, exacerbated by the record fires this summer. This is making consumers even more interested in eco-branded and natural products, which are marketed with health, beauty and sustainable benefits alike.

“Interest and concerns about health and the environment converge in the consumption of natural food and cosmetic products. Many products used in cosmetics are also marketed as uniquely healthy ‘superfoods’, such as the açaí berry and cupuaçu fruit. So, in fact, there is overlap between interest in the environment, health and aesthetics.”

**UK**

Britain’s long-held vision of good health for all is now being strained due to an ageing population and an increase in chronic diseases. Meanwhile, public concern for the environment is growing, boosted by strong celebrity interest, and popular and influential TV programmes such as Blue Planet. Climate change, air pollution, plastic and waste generally are all hot topics.

This is a turbulent time for the UK, as if the well-worn deck of cards that describes its core values and norms has been tossed into the air. Changing attitudes to food purchasing and consumption can be seen as a part of that. Young consumers in particular are connecting food, health and the environment, and flexitarians, vegetarians and vegans are becoming increasingly mainstream.

It’s not surprising, then, that there are many Planet Friends in the UK. But, demonstrating the strong divisions of opinion here today, there are a lot of Sceptics too.

“With each passing hurricane, flood, and heat wave, consciousness about climate change is rising in the USA, and rising fast. It’s very reasonable to assume that consumer beliefs and practices about the environment are going through rapid transformation. Each disaster seems to convert more followers, even in politically conservative regions. Thus, commodities that can claim to be part of a solution may make significant inroads in what could swiftly become a mass change in culture.”

**USA**

Many in the USA don’t yet see a clear link between health and environment, and there is a high percentage of Sceptics here. Generally speaking, USA culture is all about “new” and “better”: embracing products and services that are faster, cheaper, easier, tastier and more fun. If the convergence of health and environment doesn’t offer this, it will be hard to change mass consumer behaviour. That said, there is a growing trend of linking personal and planetary wellness, and even though it remains a niche area, it still embraces a lot of people due to the size of the population.

“Interest and concerns about health and the environment converge in the consumption of natural food and cosmetic products. Many products used in cosmetics are also marketed as uniquely healthy ‘superfoods’, such as the açaí berry and cupuaçu fruit. So, in fact, there is overlap between interest in the environment, health and aesthetics.”

“We are seeing vibrant culture change around health and environment growing from the local and grassroots levels, well away from the political and lobbying spheres. Action is being driven especially by young people, who have a very different experience of the UK compared with generations before them, and who are facing a very uncertain future.”
China has significant environmental problems as a result of rapid development – hence air pollution is the #1 consumer concern for health and environment alike (on 50% and 70% respectively: the highest figures anywhere). This helps to explain why China has so many Active Ambassadors and Health Conscious consumers. Health and wellness is a huge trend here. As elsewhere, this roughly divides into two: supplemented/functional products, and pure and natural. Provenance is very important for this second category, particularly for dairy, and a “clean” environment is a key factor: hence the popularity of premium imported milk from New Zealand, Australia and Europe. Interestingly, Chinese consumers can have quite a contradictory attitude to dairy: they see it as healthy, yet they can be resistant to the healthier options, as they like products that are tasty and creamy.

“The government is keen to action a sustainability agenda and can demand action in specific areas, so brands need to be environmentally aware for that reason at least. As for consumers, they generally expect quality of life to be better in the future, and sustainability can be seen as part of that.”

The impact of rapid modernisation and wealth on lifestyles, combined with a sedentary tradition due to the very hot climate, have contributed to a number of health problems in the Kingdom of Saudia Arabia. Today, it has one of the highest rates in the world for obesity, diabetes and cardiovascular disease, despite boasting first-class healthcare. Excessive consumption and a throwaway culture have also caused serious waste management issues, while interaction with nature is severely limited by the searing temperatures outside. Consequently, the link between personal and planet health has historically not been strong in Saudi Arabia, hence the large size of the Laggards segment. But attitudes are changing.

The younger generation – the overwhelming majority of the population – is keenly aware of the negative consequences of their parents’ lifestyles, largely due to their heavy social media usage. Government is also taking action, boosting spending on sports, health and fitness, and introducing heavy sugar taxes on beverages. Further afield, sustainability is one of the key themes for Expo 2020 in Dubai, which is likely to have an impact on the whole region.

“However, there are some interesting regional differences. Health and environment is particularly a key driver in mature markets, but it’s more likely to be a cultural/traditional choice in developing markets. For example, India, which has a strong vegetarian tradition, leads by some margin for consumers looking for plant-based products. Moreover, Laggards have a relatively high interest in plant-based compared with other product attributes, which again can be due to a cultural effect: in countries where their numbers are strong, plant-based products are more traditional.”
HOW TO CONNECT
STRATEGIES FOR EACH SEGMENT

ACTIVE AMBASSADORS

- Specific Motivations: Animal welfare, Future generations
- Change Index: 68%, 47%
- How to Approach: Use them as influencers and as part of expert groups. Bring them more expertise, news and facts

PLANET FRIENDS

- Specific Motivations: Less negative impact on environment, Future generations
- Change Index: 63%, 42%
- How to Approach: They want to hear and understand the facts. Channel viewpoints and research from scientists

HEALTH CONSCIOUS

- Specific Motivations: Less negative impact on environment, Seen/read something that changed my views and values
- Change Index: 70%, 37%
- How to Approach: Inspire them to find new ways to improve their health. Stimulate interaction with their peers via social media

FOLLOWERS

- Specific Motivations: Better physical health, I want to feel better about myself
- Change Index: 67%, 29%
- How to Approach: Give them the nudge and support they need. Make change as easy as possible. Provide encouragement and helpful instruction

SCEPTICS

- Specific Motivations: Social pressure from family and friends, Regulations
- Change Index: 55%, 19%
- How to Approach: Reach out on a local, grassroots level. They need to be convinced by those they recognise and trust: “people like us”

LAGGARDS

- Specific Motivations: Social pressure from family and friends, Regulations
- Change Index: 42%, 16%
- How to Approach: Give them more exposure to the issues and knowledge in general
SUMMARY & CONCLUSIONS

01 The environment and health are the two top concerns for consumers today, and they occur in that order. Two-thirds of those polled in our global consumer research study believe that we are heading towards an environmental disaster. The same proportion also believe that mental and physical health are of great concern for society.

02 Health and environment have historically been treated as separate areas. But now they are increasingly overlapping. Nearly three out of five consumers already think that their health and well-being are strongly affected by environmental problems. The more concerned about the environment they become, the more health-conscious they become too. What was once a distant, abstract concern has become much more concrete, urgent and, crucially, personal, as consumers come to see environmental problems impacting on themselves and their families.

03 The young are a strong driving force for positive change. They want and expect to be healthier and live longer than their parents, and they are making lifestyle choices accordingly. Their use of social media and their personal experience of the impacts of climate change are also urging them to act more responsibly towards the environment.

04 Consumers believe they carry the #1 responsibility for both their own health and the health of the planet. There is a growing belief that modern lifestyles, particularly what we eat and drink, result in a cycle that negatively impacts on both (see above). Many want to change their consumption behaviour accordingly – but cost, lack of knowledge, lack of availability and/or credibility of options are all major barriers. There is an interesting opportunity for brands that can help consumers to overcome these barriers and meet their growing need to live healthier, more environmentally sound lives.

05 Food and drink is a key catalyst in the convergence of health and environment. The #1 change ambition for both health and environmental reasons is greater consumption of more environmentally sound food and drink products. In particular, the sweet spot is natural/organic products. In terms of categories, 100% fruit juice, white milk, packaged water, coconut water and plant-based drinks are the most compelling.

06 Packaging, and recyclability specifically, are critical. Recycling is now considered the #1 trait of an environmentally sound person. Recyclability is the joint top association with environmentally sound products and the third most appealing descriptor of a food or drink product overall. Nearly four out of five of consumers globally are now happy to pay more for environmentally sound food and beverage packaging, while just over two out of five say they will pay more for healthier food.

07 Anti-plastic sentiment is strong. Nearly two out of three consumers believe that an environmentally sound person avoids plastic, and one in three say they plan to buy and use less plastic within the next 12 months.

08 Our research analysis reveals six global consumer segments with distinct profiles relating to awareness/concern for their health and the environment. Each group has its own distinct beliefs and values; drivers and ambitions for change; and trusted information sources. This creates opportunities for targeted products, messaging and more.

09 The most successful brands going forward will be those that can demonstrate purpose and show that they are making positive contribution to society beyond just providing good services and products. However, both our quantitative and qualitative global research reveals a trust gap when it comes to health and environment. Moreover, brands currently come way down the list of influencers in this area: only one in ten consumers take advice or inspiration from brands on either of these topics.

10 Food and beverage is perhaps the first industry to see the emerging trend for convergence of health and environment. It provides a new opportunity for brands to make a powerful, purposeful, personal connection with consumers by addressing and communicating both at the same time.
Research methodology
The research for this Index is based on the following:
- The Convergence of Health & Environment. An integrated global study by Ipsos, specially commissioned by Tetra Pak, to understand whether or not concern for health overlaps with concern for the environment. The study involved quantitative research based on 1,000 online consumer interviews carried out in May 2019 in each of nine markets: Brazil, China, India, Indonesia, Kingdom of Saudi Arabia (KSA), South Korea, Spain, UK and USA. This was followed up by qualitative research based on five deep dive consumer interviews in each of five markets: Brazil, Indonesia, Saudi Arabia, UK, USA. In addition, Ipsos leveraged its Cultural Insight Network to commission five social science experts to write focused essays on health and environment in their culture of focus: Brazil, Indonesia, KSA, Japan, USA.
- Tetra Pak Trend Index & Indicators. Based on proprietary Tetra Pak consumer research conducted across the group’s four clusters: Americas; Asia Pacific; Europe & Central Asia; Greater Middle East & Africa. The latest data used in this Index is from Q2 2019.

Report references
02-1 The Convergence of Health & Environment. See left.
05-1 Tetra Pak Environment Research. See left.
06-1 76% for physical and 75% for mental health, versus an average of 67% for both.
06-2 70% for both, versus an average of 59% for “sacrifice convenience” and 60% for “pay more”.
06-3/4 See 02-1.
07-1 See 05-1. Asked who should lead in finding improvements or solutions on environmental issues, respondents selected: the government (57%), food and beverage companies (53%), packaging companies (51%), consumers (36%), local municipalities (18%), retailers (15%) and NGOs (11%).
07-2/3 See 05-1.
09-1 “Natural”: What does it mean to consumers?, Ipsos, April 2018.
10-1/3/5 See 05-1.
10-2 Tetra Pak Trend Index & Indicators. See left.
10-4 54% of consumers say they look for environmental logos when shopping “always or often”, up from 42% in 2017, 39% in 2015 and 37% in 2013. See 05-1.
11-1 See 05-1.
26-1 Market snapshots are based on Cultural Insight Network essays, with the exception of China, which is based on insights from Tetra Pak Asia Pacific.

“At Tetra Pak, we believe that it’s no longer enough to think about issues in isolation. That’s why we have launched our Planet Positive campaign, which urges industry stakeholders to move to a low-carbon circular economy.

We believe that we must all work together to address the pressing environmental issues of climate and waste, taking a broader view of sustainability, going beyond recycling and reuse to include the carbon impact of raw materials and manufacturing.”
Adolfo Orive, President & CEO, Tetra Pak Group

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