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The Retail Institute

Product & Packaging Innovation Annual Report

EXECUTIVE SUMMARY

**Attitudes, Behaviours, and
Strategies for Sustainable Packaging**

26 July 2018

Welcome

Welcome to our Product & Packaging Annual Report, that focuses on a topic of ***“Attitudes, Behaviours, and Strategies for Sustainable Packaging.”***

The issue of plastic packaging as an environmental concern has grown immensely in public consciousness, mostly as a result of greater awareness of ocean plastic pollution through programmes such as Blue Planet and campaign organisations such as the Ellen MacArthur Foundation. The impact has been tremendous and has been felt by the retail supply chain as retailers scramble to establish their own responses to the call for an end to single use plastics.

This report, available exclusively to our members, aims to gain consumer insights into the perceptions of packaging. Therefore, we conducted a survey on a representative sample of 1000 adults residing in the UK, asking our respondents questions relating to their views on packaging, environment and their recycling habits.

This report presents our initial findings, there are, of course, many complexities to human behaviour and our survey findings are best judged alongside other research which tackles the issues with different nuances and perspectives. The research journey on this topic will continue for the Retail Institute and its members.

We trust that our research will provide you with interesting insights and helps you to engage in this lively and important global debate.

Olga Munroe,

Head of the Retail Institute



Executive Summary

Introduction

The Retail Institute's Annual Report on ***"Attitudes, Behaviours, and Strategies for Sustainable Packaging"*** focuses on the topic of consumer perceptions of packaging in relation to the environment. This research is an output of last year's Special Interest Group we held during Interpack Trade Show in Dusseldorf, where we discussed *"Consumer & Retailer Needs when Developing Packaging"*. The discussion naturally led to the problem of packaging and the environment and centred on the issue of consumers' understanding of the environmental credentials of each pack. In particular, the question was raised of how to increase consumer understanding and who should take the responsibility for the overall consumer education piece. This industry debate left us determined to learn more about consumer attitudes to the environment and its implications for the packaging industry.

To investigate this topic we have conducted a survey of over 1000 consumers to find out their current views, habits and influences. We're going to use the survey findings in multiple ways, including academic publications, and this report is merely the first dissemination of initial findings. We have included some findings from other projects to highlight particular issues which can only be ascertained with

more qualitative experimental methods. This helps us to consider problems such as the hidden needs of consumers, the way that people make their choices as well as more specific responses to product designs and labels.

Added to this, are questions about what influences people's views on the environment, beyond their own experiences. This is often difficult to determine as people may not always know exactly how their views are formed. What we can see is what is being reported in the media and there are further questions about why news outlets choose to report what they do. We can also see what sources people use and our survey shows that in the UK, the BBC is easily the most trusted news source for environmental issues.

The BBC is the most trusted source on environmental issues

Despite the corporation's reputation for objectivity, there has been frustration within the packaging industry about a distorted depiction of packaging from the media which is impeding constructive public debate. This is why we need to understand how channels of communications work on topics like this and what can be done to achieve a more balanced discussion.



Selected Highlights from the Report

The 'Blue Planet Effect'

The Blue Planet programme has shown consumers a direct link between what they do and the environmental impact of their actions. This is reflected in our survey finding which shows that ocean plastic pollution is now the most important environmental issue among consumers across all generations.

 **A Plastic Planet**
@aplastic_planet

Following

Absolutely sickening footage from the Caribbean. The lunacy of unfettered plastic consumption is now more obvious than ever. A [#PlasticFreeAisle](#) is a non-negotiable in the fight to turn this around.

Willingness to Pay for Eco-Friendly Pack

The study investigated levels of commitment to the environment by asking whether people were willing to pay a little more for an eco-friendly package. More than half of our respondents agreed that they would be willing to pay a little more for an environmentally friendly packaging and even taking out those only slightly agreed with this statement, more than a third of people responded this way. This supports other research which suggests that there is a significant market segment who are happy to pay more. Other research supports this finding suggesting that there is a market which can be targeted and potentially grown with effective sustainable packaging solutions.

Consumers, especially women, are willing to pay more for environmentally friendly packaging

Importance of Food Preservation

While this suggests that people are seeing the negative aspects of plastic packaging, we also wanted to know what they thought of other contributions such as how well it preserves food. Our survey found that significantly more people (more than 60%) saw metal and glass as effective or very effective at preserving food than rigid or flexible plastic (less than 40 %). This may be due to an overall negative perception of plastics.

Consumers believe that product will spoil more quickly if kept in the original packaging.

Consumers Say Vs Consumers Do

There is a disparity between consumer intentions and conversion to purchase, when it comes to environmental attributes of a product. Our past research shows that green motivated consumers are motivated by simple heuristics such as ease of recycling. Other consumers will consider product quality and price before packaging features. However, when it came to packaging factors on their own, environmental information was at least equal in importance as the pack's functionality such as ease of opening and storage. When it comes to end of life considerations for packaging materials, as expected, there are considerable regional variations in waste management practices that impact on consumer behaviour. This highlights the issue that consumers have limited control over their recycling behaviour as it depends on how local collection systems are arranged.

Conclusions

The Retail Institute's Annual Product & Packaging, report on the theme of consumer approaches to sustainability presents an array of research findings and insights into packaging and communication strategies for the packaging industry.

The study shows that the consumer attitude in relation to packaging and the environment are hardening and consumers will practice more pro-environmental behaviours if they are enabled to do so. There is at least a significant market segment that wants packaging to be more environmentally friendly and are willing to pay for it.

Significant part of our research relates to the way that strategies – whether it involves pack design, labelling or collection and recycling systems – must take into account how to communicate the value of those strategies.

The full report is available exclusively to the members of the Retail Institute.

For more detail please contact: RetailInstitute@leedsbeckett.ac.uk

The Retail Institute is launching a cross-industry forum this autumn, with a purpose to develop long-term and coordinated strategies for addressing the circular economy agenda for packaging.

The group will include stakeholders from the retail supply chain and packaging federations who are in a position to lobby the government with identified actions. The forum would be led and moderated by Professor Jeff Gold who is a renowned leader in the area of Future thinking and business strategies. Spaces will be limited.

Full details will be announced at our **Annual Briefing event held on 20th September.**

News and research works published by the Institute is intended to contribute to debate and ideas generation, and does not necessarily reflect the views or endorsement of The Retail Institute or Leeds Beckett University.

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