Packaging and Intralogistics

YouGov survey for Comexposium

France, Belgium, Spain, UK, Italy, Germany,

Sent 27/08/2018

September 19, 2018

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Objectives & Methodology

Objectives

- Identify differences of perception around packaging between European countries.

Methodology

- Fieldworks were conducted online, on YouGov's proprietary panel in France, the UK, Spain, Italy and Germany. And through a trusted partner in Belgium.
- The data are weighted to be representative of each local population.

Sample

- N= 1058 adults representative of the French national population
- N= 1001 adults representative of the Belgian national population
- N= 2099 adults representative of the British national population
- N= 1000 adults representative of the Spanish national population
- N= 1037 adults representative of the Italian national population
- N= 2058 adults representative of the German national population

Fieldwork

- France : 13-16 of July 2018
- Belgium : 13-17 of July 2018
- UK : 13-16 of July 2018
- Spain : 13-16 of July 2018
- Italy : 13-16 of July 2018
- Germany : 13-16 of July 2018

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Key insights (1/2)

Senior citizens and packaging

1. Poor legibility of packaging information as well as opening/re-sealing difficulties are key for senior citizens, regardless of the country
2. While some countries (France, Spain, the UK and Italy) also raise the issue of excessive packaging weight, Belgians and Germans criticize poorly adapted formats for consumption

Resources depletion and pollution

1. To fight against pollution and the current depletion of resources, respondents have different views depending on the country they live in
2. A ban on « over packaging » rates as the best solution in the UK and Germany, and to a lesser extent, in France and Belgium. In Italy and Spain, a monetary reward to return used packaging is preferred
3. A ban on non-recyclable packaging is also important in all countries
4. Baby boomers are more likely to favour a ban on non-recyclable packaging to fight pollution compared to Millennials

Development of artificial intelligence

1. For packaging, artificial intelligence could provide economical advantages (limiting waste thanks to alerts when approaching the sell by date) and ecological advantages (smarter sorting out of the different types of packaging in order to recycle them)
2. These benefits meet general approval, both among the national population and specific age groups

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Key insights (2/2)

An increased mobility

1. Overall, waste management of used packaging and improvement of its opening/re-sealing features (practicality) are the top 2 elements necessary to adapt to society's increased mobility
2. Except for Germans, who consider that improving the volume of packaging is more important
3. In terms of practicality (opening/re-sealing), specific age groups behave the same in Germany and in the UK: Baby Boomers grant relatively more importance to practicality, when Millennials tend to care less.
4. The high rate of "I don't know" responses to questions 3 and 4 shows how difficult it is for consumers to project themselves into the future. However, they know precisely what they want regarding the more tangible issue of minimizing the environmental impact of packaging. On the one hand, we see a soft consensus, and on the other hand, clear-cut preferences of the different countries. The evolution of packaging follows.

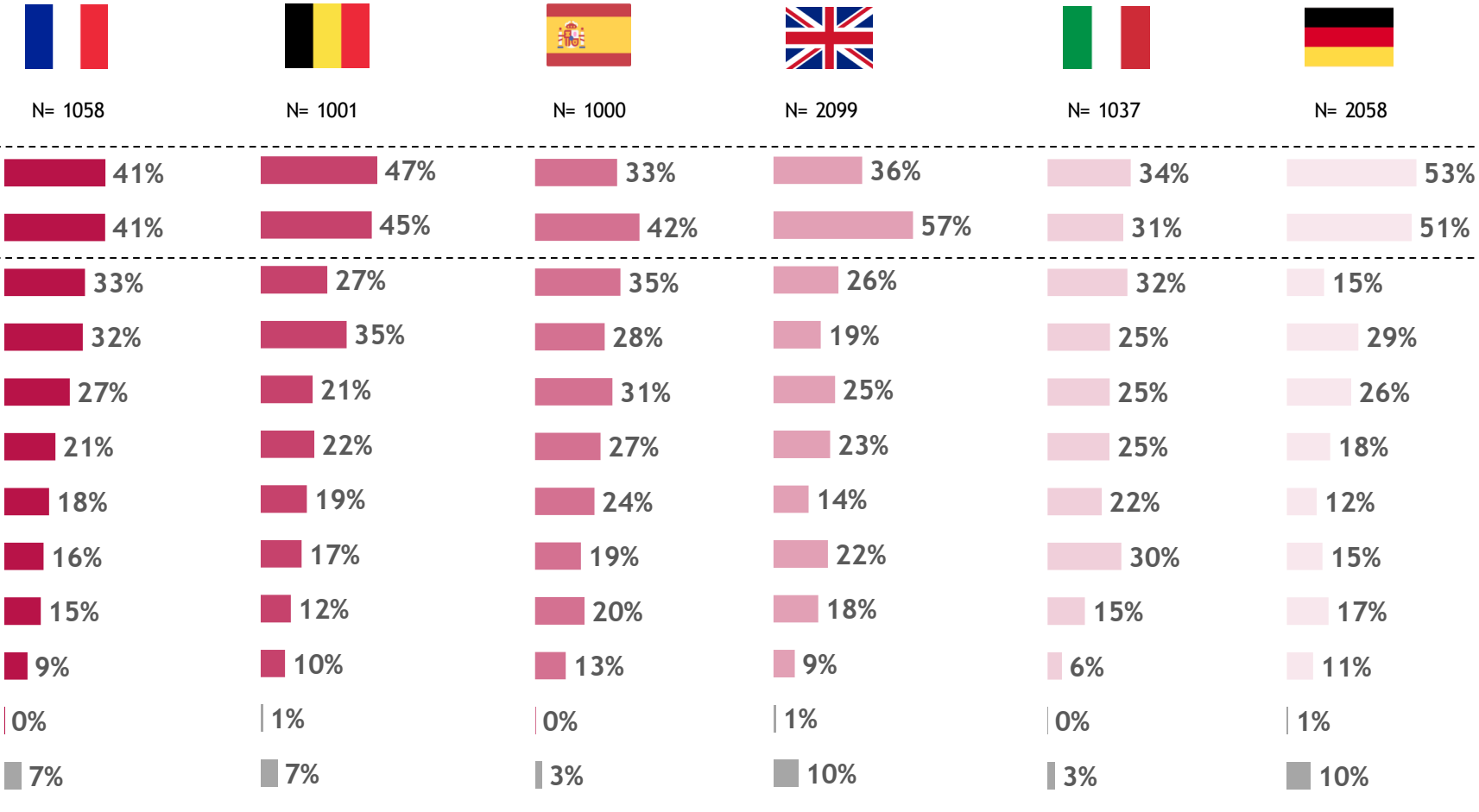
©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Cross-country analysis

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

In all countries, a bad readability of packaging (Belgium, France, Italy, Germany) and its opening and re-sealing features (UK, France, Spain) are most problematic for senior citizens.

Senior citizens and packaging



COM1. According to you, what are the three main issues that could arise when a senior citizen has to deal with packaging ?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Weight and format of packaging complete the podium. A focus on specific age groups indicates that in the UK, Germany and, to a lesser extent, Belgium, Baby Boomers give more importance to the opening and sealing of packaging and their legibility than Millennials.

Senior citizens and packaging

	TOTAL						
	N= 8253	N= 1058	N=1001	N= 1000	N= 2099	N= 1037	N= 2058
TOP 3 – 1	Opening and sealing of packaging **(47%)**	Readbility/legibility of the information **(41%)**	Readibility/legibility of the information **(47%)**	Opening and sealing of packaging **(42%)** Millennials : 32%	Opening and sealing of packaging **(57%)** Millennials : 42% Baby boomers : 66%	Readibility/legibility of the information **(34%)**	Readibility/legibility of the information **(53%)** Millennials : 44% Baby boomers : 59%
TOP 3 – 2	Readbility/legibility of the information **(42%)**	Opening and sealing of packaging **(41%)** Millennials : 34%	Opening and sealing of packaging **(45%)**	A too heavy product **(35%)**	Readibility/legibility of the information **(36%)** Baby boomers : 40%	A too heavy product **(32%)**	Opening and sealing of packaging **(51%)** Millennials : 37% Baby boomers : 58%
TOP 3 – 3	An unsuitable format **(27%)**	A too heavy product **(33%)**	An unsuitable format **(35%)** Millennials : 26% Baby boomers : 43%	Readibility/legibility of the information **(33%)**	A too heavy product **(26%)** Millennials : 33%	Opening and sealing of packaging **(31%)**	An unsuitable format **(29%)** Baby boomers : 33%

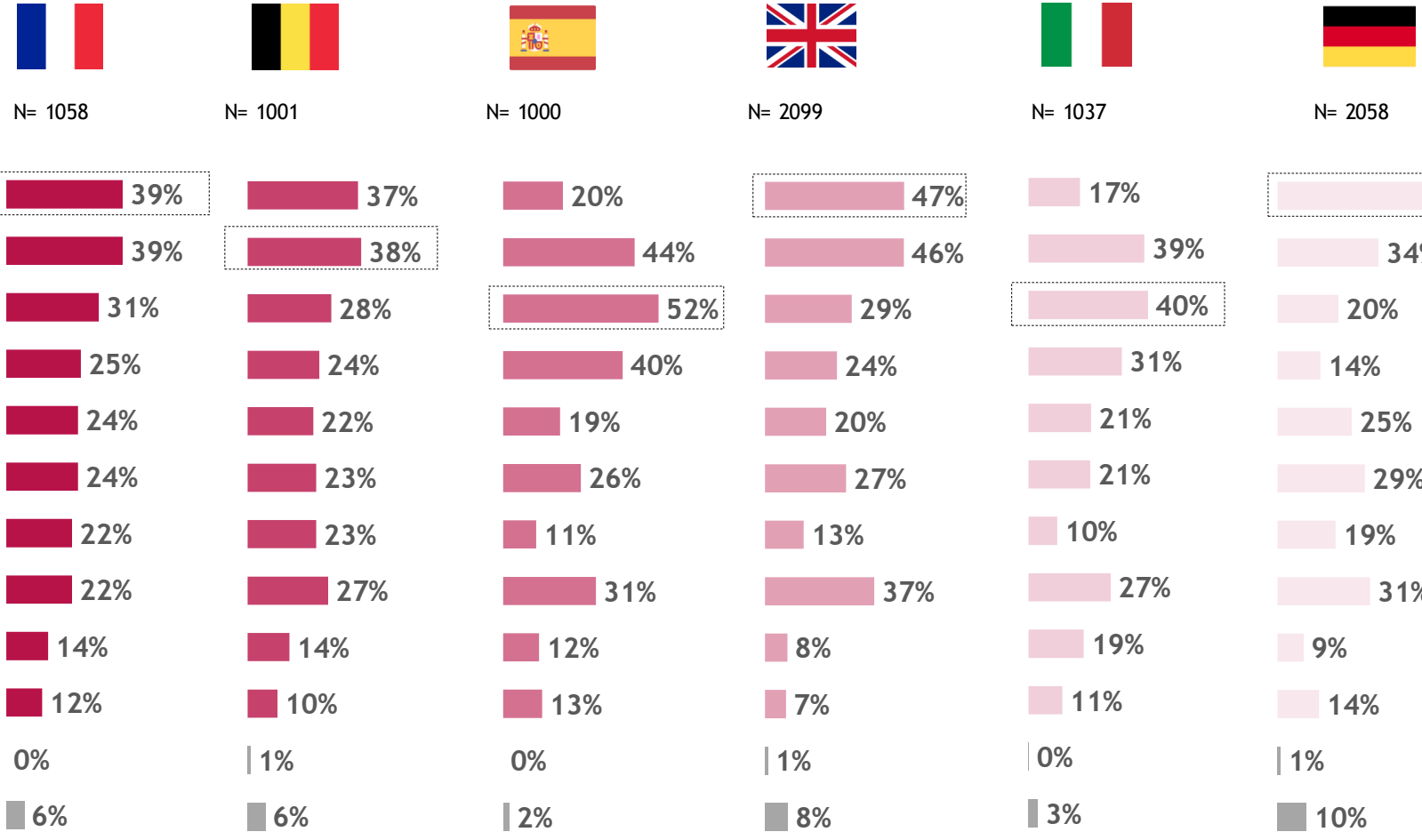
COM1. According to you, what are the three main issues that could arise when a senior citizen has to deal with packaging ?

XX%XX% Significant differences between the specific targets Vs total country

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Facing a depletion of resources and pollution issues, French, British and German respondents encourage a ban on “over packaging”. Italians and Spanish would rather receive money for the return of used packaging while Belgians prefer a ban on non recyclable packaging. These three complementary measures cover expectations in all countries, also relieving consumers of other obligations. A low number of "I don’t know" to this question confirms this.

Resources depletion and pollution



COM2. Amongst the following, what do you think would help to continue using effective packaging without irreversibly damaging the planet?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Regarding specific age groups, we notice that the British, French and Belgian Baby boomers give more importance to the ban of the non recyclable packaging compared to Millenials.

Resources depletion and pollution

	TOTAL N= 8253	 N= 1058	 N=1001	 N= 1000	 N= 2099	 N= 1037	 N= 2058
TOP 3 – 1	Forbid non recyclable packaging **(40%)**	Forbid "over packaging" (39%)	Forbid non recyclable packaging (38%) Baby boomers : 44%	A monetary reward for returning used packaging (52%)	Forbid "over packaging" (47%)	A monetary reward for returning used packaging (40%)	Forbid "over packaging" (49%)
TOP 3 – 2	Forbid "over packaging" **(38%)**	Forbid non recyclable packaging (39%) Millennials : 28% Baby boomers : 46%	Forbid "over packaging" (37%)	Forbid non recyclable packaging (44%)	Forbid non recyclable packaging (46%) Millennials : 41% Baby boomers : 51%	Forbid non recyclable packaging (39%)	Forbid non recyclable packaging (34%) Millennials : 29%
TOP 3 – 3	A monetary reward for returning used packaging **(31%)**	A monetary reward for returning used packaging (31%)	A monetary reward for returning used packaging (28%)	Educate and support consumers for them to recycle more (40%)	Enforce the usage of more packaging made of renewable resources (37%)	Educate and support consumers for them to recycle more (31%)	Enforce the usage of more packaging made of renewable resources (31%)

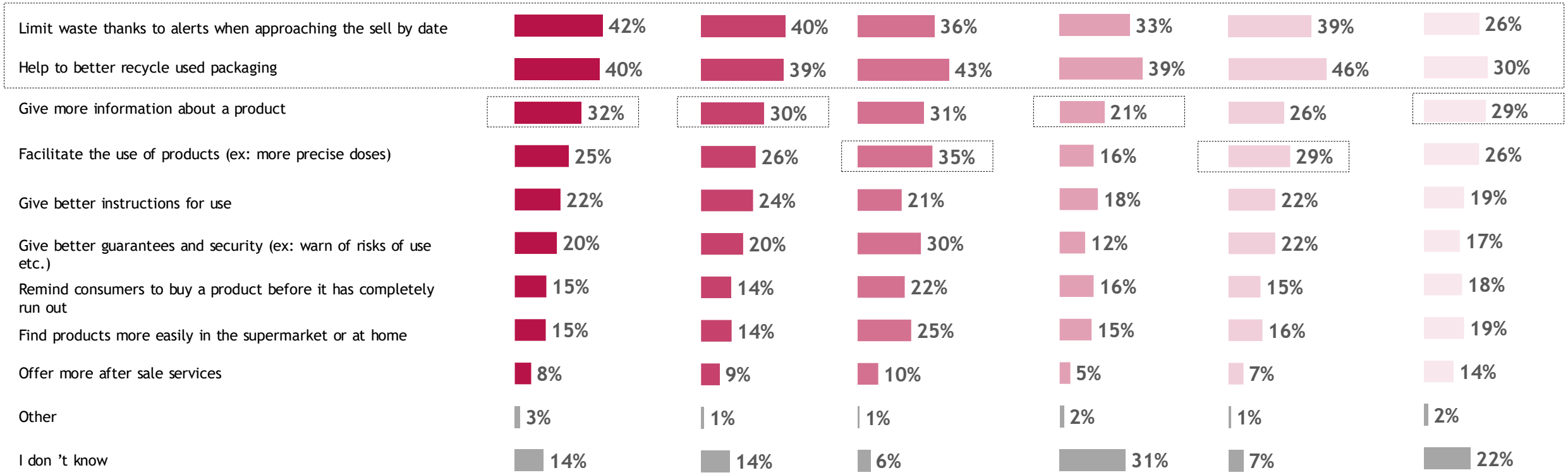
XX%XX% Significant differences between the specific targets Vs total country

COM2. Amongst the following, what do you think would help to continue using effective packaging without irreversibly damaging the planet?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

On a packaging, artificial intelligence is viewed as useful for economic and ecological purposes (limit waste / help to better sort and recycle used packaging) in all countries. The artificial intelligence of packaging is therefore seen as a setting up of technical and environmental functions and not as a communication or marketing tool. However, a high proportion of “I don’t know" responses shows that other solutions should be explored or suggests that a packaging with artificial intelligence still needs to convince consumers.

Development of artificial intelligence



COM3. How do you think AI will benefit packaging?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

This consensus about artificial intelligence also exists across specific age groups in each country. Although artificial intelligence is not just about connected packaging, it is surprising that Millennials don't rate it higher than Baby Boomers.

Development of artificial intelligence

	TOTAL N= 8253	 N= 1058	 N=1001	 N= 1000	 N= 2099	 N= 1037	 N= 2058
TOP 3 1	Help to better recycle used packaging (38%)	Limit waste thanks to alerts when approaching the sell by date (42%)	Limit waste thanks to alerts when approaching the sell by date (40%)	Help to better recycle used packaging (43%)	Help to better recycle used packaging (39%)	Help to better recycle used packaging (46%)	Help to better recycle used packaging (30%)
2	Limit waste thanks to alerts when approaching the sell by date (34%)	Help to better recycle used packaging (40%) Millennials : 33%	Help to better recycle used packaging (39%) Baby boomers : 45%	Limit waste thanks to alerts when approaching the sell by date (36%)	Limit waste thanks to alerts when approaching the sell by date (33%)	Limit waste thanks to alerts when approaching the sell by date (39%)	Give better instructions for use (29%)
3	Give better instructions for use (27%)	Give better instructions for use (32%)	Give better instructions for use (30%)	Facilitate the use of products (ex: more precise doses) (35%)	Give better instructions for use (21%)	Facilitate the use of products (ex: more precise doses) (29%)	Limit waste thanks to alerts when approaching the sell by date (26%)

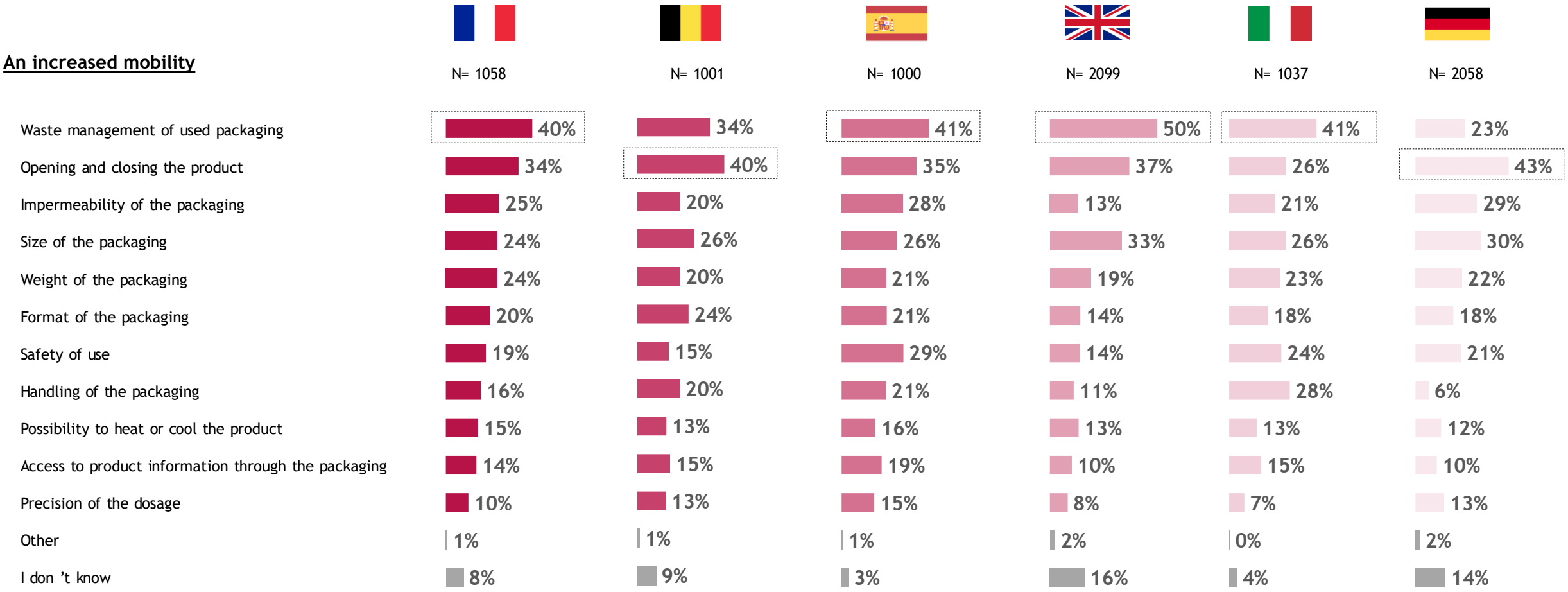
XX%XX% Significant differences between the specific targets Vs total country

COM3. How do you think AI will benefit packaging?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

An increased mobility of the population requires improving waste management for the French, Spanish, British and Italians, while Belgians and Germans prefer improvements regarding the opening / re-sealing of the product. Here again the fairly high percentage of "I don't know" answers opens the door to new or existing features to be developed.

An increased mobility



COM4. According to you, what are the three aspects of current packaging which should be improved to become more suited to societies in which people travel and are on the go more and more?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Better waste management of used packaging appears necessary among all age groups. Baby Boomers would like to see opening and re-sealing features improve in the UK and Germany (more so than Millenials).

An increased mobility

	TOTAL N= 8253	N= 1058	N=1001	N= 1000	N= 2099	N= 1037	N= 2058
1	Waste management of used packaging **(38%)**	Waste management of used packaging **(40%)**	Opening and closing the product **(40%)**	Waste management of used packaging **(41%)**	Waste management of used packaging **(50%)**	Waste management of used packaging **(41%)**	Opening and closing the product **(43%)** Millennials : 36% Baby boomers : 48%
TOP 3 2	Opening and closing the product **(37%)**	Opening and closing the product **(34%)**	Waste management of used packaging **(34%)** Millennials : 26%	Opening and closing the product **(35%)**	Opening and closing the product **(37%)** Millennials : 31% Baby boomers : 42%	Handling of the packaging **(28%)**	Size of the packaging **(30%)** Baby boomers : 34%
3	Size of the packaging **(29%)**	Impermeability of the packaging **(25%)**	Size of the packaging **(26%)**	Safety of use **(29%)**	Size of the packaging **(33%)**	Opening and closing the product **(26%)**	Impermeability of the packaging **(29%)** Millennials : 24%

XX%XX% Significant differences between the specific targets Vs total country

COM4. According to you, what are the three aspects of current packaging which should be improved to become more suited to societies in which people travel and are on the go more and more?

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Demographic Breakdown of Samples

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Contacts

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group

Caroline Zattarin

Research Manager

caroline.zattarin@yougov.com +33 (0)1 85 08 47 85

Malika Boufouln

Senior Research Executive

malika.boufouln@yougov.com

Justin Chiron

Junior Research Executive

justin.chiron@yougov.com

©Survey conducted by YouGov on behalf of the trade show ALL4PACK PARIS – Comexposium Group