

**FEVE
EUROPEAN PACKAGING SURVEY**

**FINAL REPORT
SEPTEMBER 2010**



Epiphaneia

THE HAGUE, THE NETHERLANDS

COLOFON

FEVE EUROPEAN PACKAGING SURVEY

SEPTEMBER 13, 2010

© EIPHANEIA

EIPHANEIA BV

FREDERIK HENDRIKLAAN 26

2582 BB THE HAGUE

T: +31 (6)53654233

E: HANSANKER2020@GMAIL.COM

FEVE EUROPEAN PACKAGING SURVEY

TABLE OF CONTENTS

EXECUTIVE SUMMARY	Page	5
GLASS EVOKES STRONGEST POSITIVE FEELINGS		
Glass evokes stronger positive feelings than other packaging materials	Page	7
General feelings towards metal containers are less positive and much less intense	Page	7
General feelings towards plastic are also less positive than feelings towards glass	Page	7
STRONG SUPPORT FOR GLASS AS A PACKAGING MATERIAL		
Glass as a packaging material receives a warm welcome, especially when it comes to health, taste and recycling	Page	8
PROMOTING USE OF GLASS: PEOPLE LOOK AT GOVERNMENT AND PRODUCERS OF CONSUMER PRODUCTS FIRST		
People look at the government and producers of consumer products first for change	Page	9
Consumer organizations, retailers and glass industry may also contribute	Page	9
Majority of respondents see a role for themselves	Page	9
OVERWHELMING SUPPORT FOR RIGHT TO GLASS		
People feel they have the right to get certain products in glass containers	Page	10
MANY PEOPLE WILLING TO PAY FOR RIGHT TO GLASS		
Many people willing to pay for the right to glass.....	Page	11
MANY PEOPLE WILLING TO TAKE CONCRETE ACTION TO PROMOTE USE OF GLASS		
Great willingness to undertake action to promote use of glass packaging	Page	12

Epiphaneia

EXECUTIVE SUMMARY

An overwhelming majority of European consumers (84 percent) supports the right to get certain consumer products in glass packaging. Almost half of European consumers (42 percent) are willing to pay extra for this right. Glass evokes very strong positive feelings, reflected by a huge favorability rate of 79 percent. Glass thus outperforms metal containers and plastic by more than 30 percent. Consumers prefer glass to alternative packaging materials because they believe glass is better at preserving taste, better for their health and easier to recycle. European consumers want more to be done to promote the use of glass. To that end, they look at the government and producers of consumer products first. But they also expect more action from consumer organizations, retailers and the glass industry. Finally, a solid majority of consumers believe that they should be doing more themselves to promote the use of glass, showing real grassroots potential across Europe for the use of glass as a packaging material.

- 1. Very strong support for the right to glass packaging.** An overwhelming majority of European consumers (84 percent) want to have the right to get certain products in glass packaging.
- 2. Consumers care about this right and are willing to follow through in a multitude of different ways.**
 - ▶ European consumers are prepared to put their money where their mouth is. Almost half of the respondents (42 percent) say they are willing to pay extra for the right to glass packaging;
 - ▶ A dramatic 70 percent of respondents say it is 'very likely' or 'likely' that they will buy more products in glass to make sure that more products are offered in glass;
 - ▶ More than half of the respondents (55 percent) say they are (very) likely to sign a petition;
 - ▶ Almost half of the respondents (45 percent) say they are (very) likely to react to an online article;
 - ▶ A sizable 14 percent of the respondents say they are (very) likely to contact a member of parliament;
 - ▶ As many as one out of eight respondents (12 percent) would be (very) likely to organize a protest.
- 3. Huge favorability score for glass.** These excellent properties of glass also translate into a huge favorability score of 79 percent for glass. Feelings toward glass are much more warmly than feelings towards metal containers (47 percent) and plastic (43 percent).
- 4. Reason: glass is good at preserving taste, keeps food and beverages healthy and recycles well.** People care about the right to glass because they prefer glass to plastic, the main alternative packaging material, by very large margins in terms of preserving taste, health and recycling.
- 5. Broad support for extra efforts to get more consumer products offered in glass.** Consumers across Europe are willing to take action to make sure that, compared with the current situation, more consumer products are being offered in glass. They first turn to their respective governments (78 percent 'do more') and the producers of consumer products (82 percent). 'Consumer organizations' and retailers are jointly in third place (75 percent), followed at a short distance by 'the glass industry' (71 percent). A solid majority of consumers (59 percent) believe they themselves should do more.

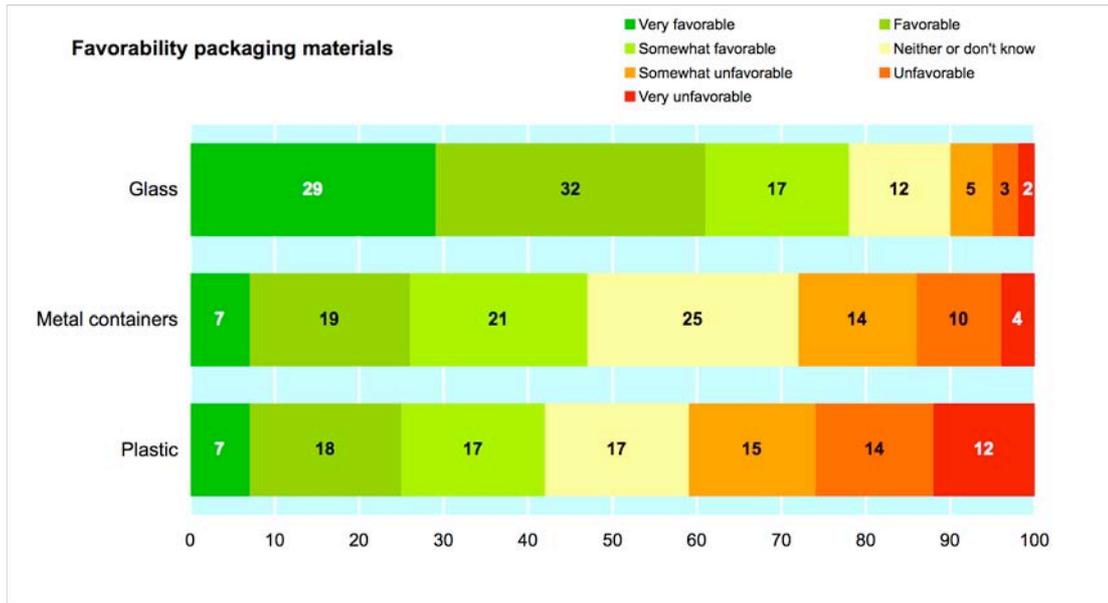
These findings are based on a 19-country survey conducted between August 23 and September 3, 2010. The included countries are Austria, Belgium, Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Italy, Netherlands, Poland, Portugal, Slovakia, Spain, Sweden, Switzerland, Turkey and the UK. In each country, around 500 interviews were conducted. Epiphaneia was responsible for the writing of the questionnaire, data analysis and the final report. Fieldwork was carried out by TNS, the world's largest custom market research specialists. All data presented here are weighted by sex and age. The same analyses were also run for a dataset weighted by population size.¹ These analyses produced remarkably similar results as presented in this report and will therefore not be reported separately.

¹ The correction for population size means that respondents from, for example, Germany and Estonia are no longer counted equally. Instead, each German respondent is treated as the equivalent of 58 Estonian respondents, reflecting the difference in population size between Germany and Estonia (82.8 million versus 1.43 million people).

Epiphaneia

GLASS EVOKES STRONGEST POSITIVE FEELINGS

Glass evokes stronger positive feelings than other packaging materials. Glass receives a very high mean favorability score of 79 percent (shown in green, this is the sum score of 'very favorable', 'favorable' and 'somewhat favorable').² Just 10 percent of the respondents view glass unfavorably. The remaining 12 percent have neutral feelings or do not know how they feel about glass packaging. Almost one in three respondents (29 percent) view glass 'very' favorably, indicating the presence of strong positive emotions towards glass.



Question format: 'Here is a short list of packaging materials. How favorable or unfavorable do you generally feel about them?'
 Categories: 'very favorable' (coded as +3); 'favorable' (coded as +2); 'somewhat favorable' (coded as +1); 'neither (0)'; 'somewhat unfavorable' (-1); 'unfavorable' (-2); and 'very unfavorable' (-3). Between 1 and 2 percent of the respondents responded with 'don't know'. For ease of presentation, they were added to the 'neither' category.

General feelings towards metal containers are less positive and much less intense. Metal containers receive a favorability rating of 47 percent, while 28 percent of the respondents feel unfavorably toward metal. Compared with glass, respondents harbor rather shallow emotions towards metal: exactly one quarter (25 percent) have a neutral feeling towards metal. Just 7 percent of the respondents have a 'very favorable' feeling towards metal and just 4 percent have a 'very unfavorable' feeling towards metal.

Of all 19 countries included in this survey, respondents from Poland think most favorably about metal containers (59 percent favorability). Other countries with positive feelings toward metal are Turkey (56 percent), Greece, the Netherlands (both 55 percent), the UK and Belgium (both 54 percent). The strongest negative feelings about metal are found in Slovakia (42 percent unfavorable), Portugal (41 percent unfavorable) and, to a lesser extent, in France and Estonia (37 and 36 percent 'unfavorable', respectively).

General feelings towards plastic are also less positive than feelings towards glass. Plastic enjoys a comparatively low 43 percent favorability rating, with 40 percent thinking unfavorably about plastic.³

² The scores for the categories 'very favorable', 'favorable' and 'somewhat favorable' in the bar chart add up to just 78 percent, rather than 79 percent. This is due to rounding error.

³ The 1-point discrepancies with the 42-percent favorability and 41-percent unfavorability scores in the chart are due to rounding error.

STRONG SUPPORT FOR GLASS AS A PACKAGING MATERIAL

Glass as a packaging material receives a warm welcome, especially when it comes to health, taste and recycling. More than two out of three respondents (68 percent) prefer glass to plastic when it comes to ‘food and beverages in general’. Feelings toward glass are most positive in the Southern Europe (Turkey, 94 percent preferring glass to plastic; Greece, 91 percent; Italy, 83 percent; Portugal, 80 percent; Spain, 74 percent) and Poland (75 percent). Estonia is the only country with majority support for plastic (53 percent plastic versus 47 percent glass). The already highly favorable numbers for glass go up further when respondents are asked to make a choice between glass and plastic in a number of specific terms:

Healthy and sustainable lifestyle

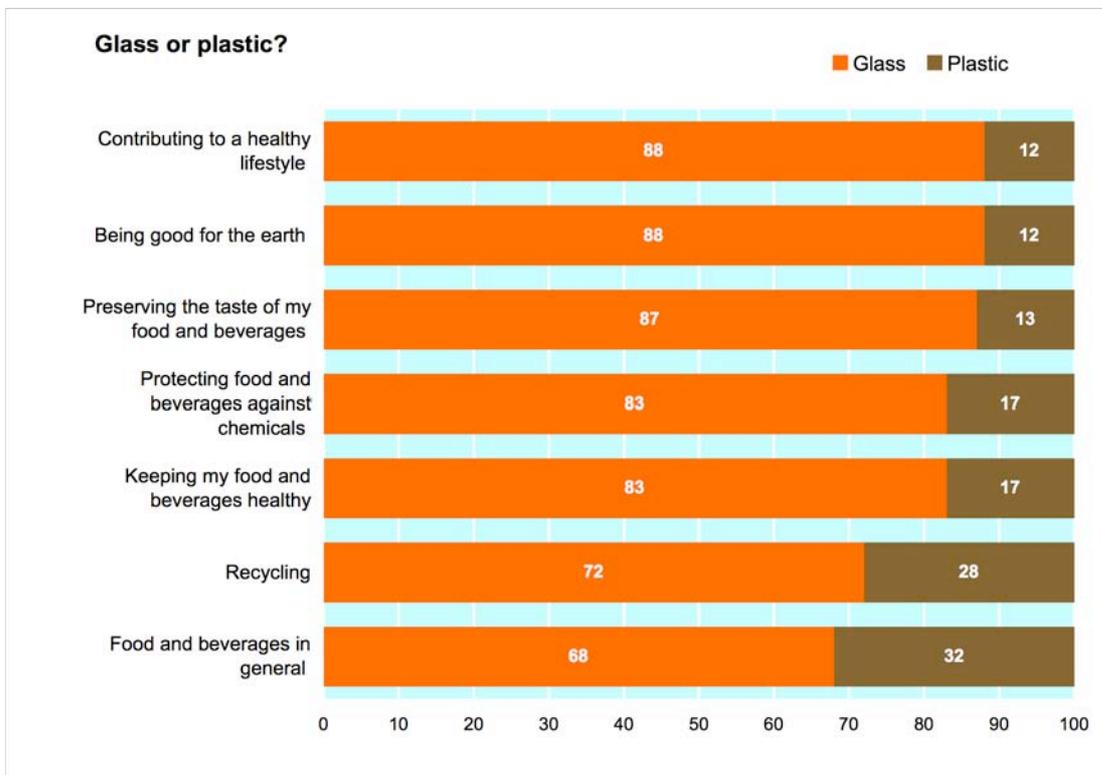
- ▶ A dramatic 88 percent of the respondents prefer glass to plastic when it comes to ‘Contributing to a healthy lifestyle’. Just 12 percent of the respondents prefer plastic to glass in this respect.
- ▶ 83 percent of the respondents prefer glass to plastic in terms of ‘Protecting food and beverages against chemicals’.
- ▶ 83 percent of the respondents prefer glass to plastic when it comes to ‘Keeping my food and beverages healthy’.

Taste

- ▶ An overwhelming majority of the respondents (87 percent) prefers glass to plastic when it comes to ‘Preserving the taste of my food and beverages’.

Recycling

- ▶ 88 percent of the respondents prefer glass to plastic when it comes to ‘Being good for the earth’.
- ▶ 72 percent of the respondents prefer glass to plastic in terms of ‘Recycling’

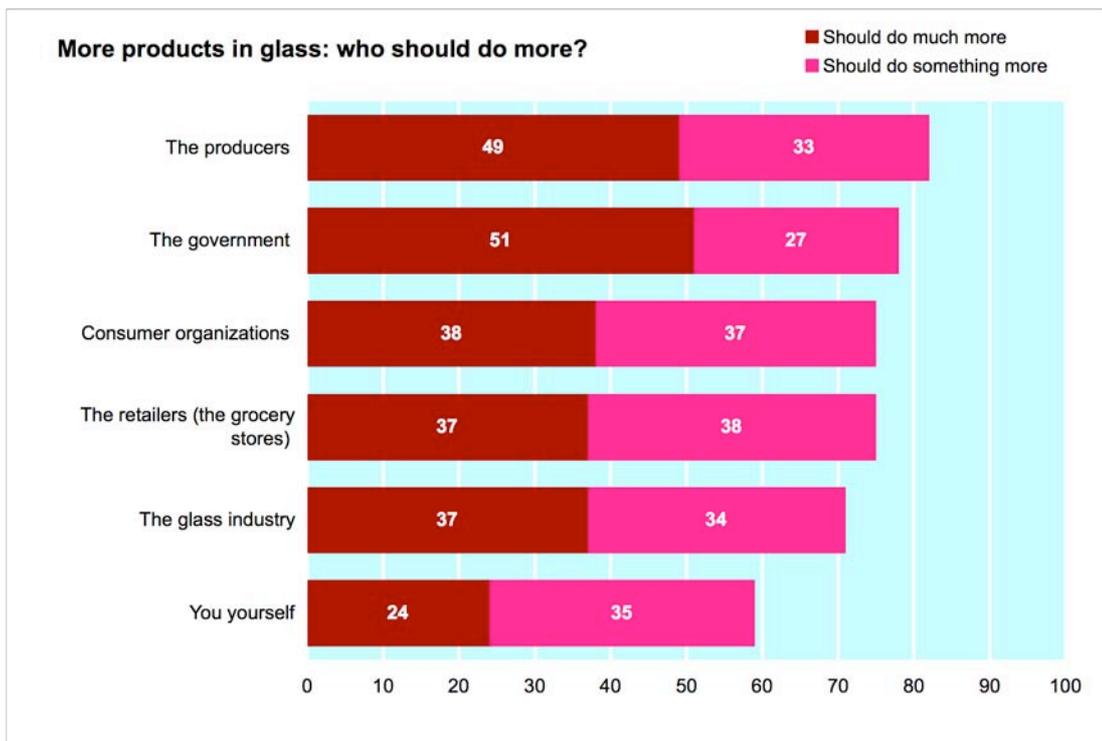


Question format: ‘What kind of packaging do you prefer for ... ?’ Don’t know responses ignored. This amounts to the familiar (and reasonable) assumption that the ultimate distribution of preferences of don’t know respondents, if they were to express an opinion, will be identical to the distribution of preferences of the respondents who expressed an opinion right away (represented in the chart).

PROMOTING USE OF GLASS: PEOPLE LOOK AT GOVERNMENT AND PRODUCERS OF CONSUMER PRODUCTS FIRST

People look at the government and producers of consumer products first for change. When asked who should take responsibility first for making sure that more products will be sold in glass, respondents are most inclined to look at the government and the producers of consumer products. An impressive 82 percent of the respondents say that producers should 'do more' to make sure that more products are being offered in glass. Also, an equally impressive 78 percent of the respondents look at the government for action. These opinions also run deep: one in two respondents feel that producers and the governments should do 'much more' (49 and 51 percent, respectively).

Consumer organizations, retailers and glass industry may also contribute. Respondents also believe that the consumer organizations (75 percent do more), retailers (75 percent 'do more') and the glass industry (71 percent 'do more') have a role to play in making sure that more products are being offered in glass.



Question format: 'Here are some groups and organizations that might be able to contribute to more products being offered in glass. Please indicate for each whether you think, compared with the current situation, they should do more or do less to make sure that more products are being offered in glass.'

Majority of respondents see a role for themselves. A clear majority of the respondents (59 percent) believe they themselves should do more to make sure that more products are being offered in glass. So people are not just pointing to others to promote the use of glass, they are clearly aware that they themselves also have a role to play – as citizens or in their role as consumers.

OVERWHELMING SUPPORT FOR RIGHT TO GLASS

People feel they have the right to get certain products in glass containers. An overwhelming majority of the respondents (84 percent) support the idea that they have some kind of right to get certain products in glass containers. Just 7 percent of the respondents believe that such a right should not exist. Nine percent of the respondents doesn't know. Again, the glass-friendly respondents for Southern Europe and Poland are the most fervent supporters of a right to glass. They are joined by respondents from Belgium, Slovakia and the Czech Republic.



Question format: 'Do you believe consumers should have the right to get certain products in glass packaging?'

MANY PEOPLE WILLING TO PAY FOR RIGHT TO GLASS

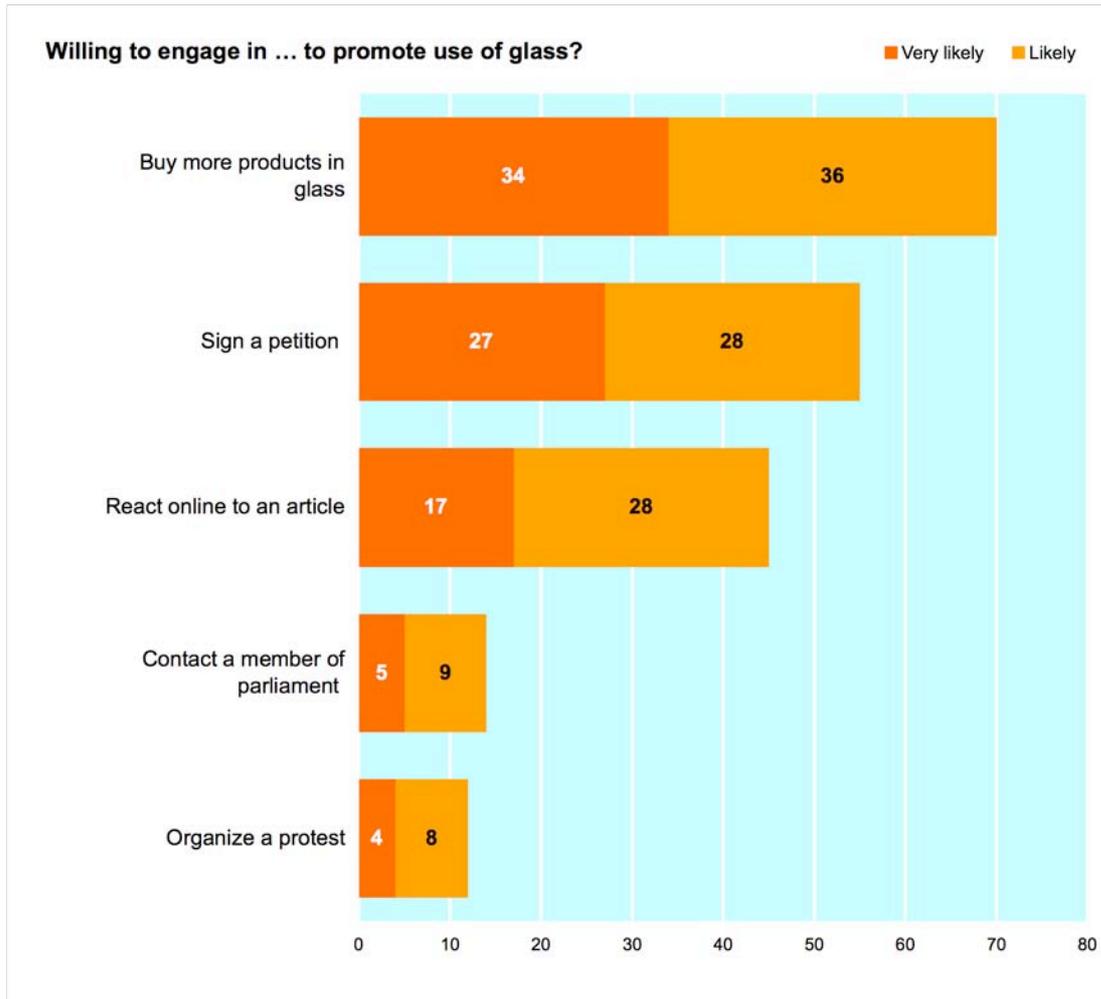
Many people willing to pay for the right to glass. An impressive 42 percent of the respondents say they are willing to pay extra for glass. The bulk of this group (29 percent) would be willing to pay up to 5 percent more, 10 percent would be willing to pay up to 10 percent more, and the remaining 3 percent would be willing to pay even more. The highest willingness to pay extra exists in Turkey, Slovakia, Poland, Hungary and the Czech Republic. The Netherlands leads the pack of countries with the lowest willingness to pay extra. The Dutch are joined by Belgium, France, Portugal, Spain and the UK.



Question format: 'How much would you be willing to pay for the right to glass packaging?'

MANY PEOPLE WILLING TO TAKE CONCRETE ACTION TO PROMOTE USE OF GLASS

Great willingness to undertake action to promote use of glass packaging. Respondents are willing to engage in various acts to promote the use of glass as a packaging material. A solid majority of the respondents say they are 'very likely' or 'likely' to buy more products in glass (70 percent). Signing a petition also enjoys majority support (55 percent). And almost half of the respondents say they are (very) likely to react to an online article (45 percent). In addition, there are small, but meaningful minorities that are (very) likely to engage in more 'difficult' acts, like contacting a member of parliament (14 percent) or organizing a protest (12 percent). This shows there is a real grassroots potential across Europe for promoting the use of glass as a packaging material.



Question format: 'Here are some things you could do to make sure that more products are offered in glass. How likely is it that you would do these things?'. Response categories: 'very likely'; 'likely', 'somewhat likely', 'not likely' and 'not at all likely'.
