



FILTRONA WHITEPAPER FEBRUARY 2021

PACKAGING RESOLVED?

*The continued consumer demand
for packaging improvements*

We deliver solutions, not just tape



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INTRODUCTION

In 2013 Filtrona launched its first quantitative research study to identify and understand consumers' views regarding packaging. It was clear that dissatisfaction with packaging appeared to impact many respondents, with 85 per cent identifying some element of frustration with packaging.

At the time, getting into the packaging was the key challenge for half of the respondents and over 80 per cent highlighted annoyance when opening a pack. Products that featured heavily amongst consumers' pet hates also tied in with this, with 'clam-shell style' hard sealed plastic packaging being mentioned as infuriating throughout!

In addition, excess packaging, whilst not the number one issue, was a frustration for many. In particular, the older the respondent the more conscious they appeared to be of waste and finding excessive packaging to be an issue.

It was clear that there was plenty to do. The opportunity to resolve frustrations with packaging was available; providing practical functionality that consumers valued, namely being easy to open, ensuring protection of the contents and being clear and easy to use.

So, have things changed? To answer this, Filtrona has once again sought the views of UK consumers¹. The results show that there has indeed been change, and consumers' views have developed, particularly in the light of current trends regarding sustainability, the growth in e-commerce retailing and dealing with the challenges of the COVID-19 pandemic.

From identifying the packs that frustrate and delight us to understanding the features consumers value, this White Paper reports on the key findings from Filtrona's major quantitative survey and shares insights around packaging functionality, and the role it plays in all our lives.



**85% REPORTED
A FRUSTRATION
WITH PACKAGING
IN 2013**

¹ Filtrona Tapes commissioned an independent online survey of 1,000 UK consumers between the ages of 18 and 88 in Q4 2020 regarding their opinions on packaging. Full results are available in Appendix 1.



THE FILTRONA TAPES CONSUMER SURVEY ON PACKAGING

An improvement – but still plenty to do

In 2013, 85 per cent of consumers surveyed had a frustration with packaging. This time, when asked if they had found any of the packaging used recently to be frustrating, 70 per cent said they did. **A decrease of 15 per cent is significant.**

Initiatives such as Amazon's 'Frustration Free Packaging' and trends towards simple packaging may well have helped deliver this improvement².

Indeed, it is possible that people are potentially seeing more value in packaging and this is driving the improved response.

The increasing importance placed on packaging's functionality to protect from damage, hygiene or tampering, may also be playing a role and will be looked at later.

But, while we have seen an improvement, with nearly three quarters of consumers expressing a frustration with packaging, there is still plenty to do.



The demand for easy-opening packs continues

Difficulties getting into packs topped the agenda in the last survey when people were asked to select their frustrations with packaging.

The results demonstrate that this continues. Openability is still a very important issue for consumers, with 57 per cent of those surveyed selecting 'Difficult to open' as a top frustration and 48 per cent saying that they had to use knives or other tools to get into packs. This compares to 61 per cent and 69 per cent in 2013.

While this is an improving picture overall, when we look at the analysis by age, this decrease disappears, with 66 per cent those over 55 years old saying difficult to open is a top three concern and 59 per cent highlighting the need for use of knives or other tools.

Ageing and challenges with packaging therefore still drive a key need to improve packaging for use by the older population, despite the work of brands and businesses to include the benefits of features such as easy opening tapes. Indeed, at its worst packaging can lead to injury and even hospitalisation and it is often the old that suffer most with this. The need for inclusive packaging, accessible by all, remains³.

² <https://bizongo.com/blog/simple-packaging-trends/> & <https://tinuiti.com/blog/amazon/amazon-frustration-free-packaging-new/>

³ <https://www.dailymail.co.uk/news/article-2547194/Wrap-rage-injuries-soartwo-thirds-Brits-admit-fallen-victim-tricky-packaging.html>

Overpackaging – today's number one frustration

While openability was the key issue in 2013 and continues to feature significantly in this survey, the top spot has now changed. Too much packaging is now the number one frustration with 58 per cent of consumers highlighting this issue, an increase from 49 per cent in 2013.

So, what has driven this change?

One key dynamic is the growth of e-commerce in all our lives. In 2013, according to leading research provider Statista, the value of online retail sales in the UK was around £40 billion, yet by 2020 this had exploded to just under £100 billion⁴.

This dramatic change in the retail environment has seen the demands on packaging alter significantly. The need to protect goods throughout the supply chain and the move from a traditional retail environment to one of items being delivered direct to our homes has meant packaging has changed.

Many consumers however are frustrated by this and see the protective packaging as excessive, with reports in national media naming online retailers such as Amazon and eBay amongst those viewed by the public as the worst offenders⁵. The term 'wrap rage' now encompasses not only frustration with getting into packs but also with overpackaging, with websites and social media shares highlighting the issue for others to see⁶.

When asked to think about goods delivered to our homes, 56 per cent said that there is too much packaging and 40 per cent highlighted there is a lot of waste. The demand for sustainability is often driving this frustration with overpackaging, and items that are overpackaged are seen as wasteful and bad for the environment, which reflects negatively on brands.

Developing appropriate packaging for e-commerce goods is now essential for brands. For example, corrugated box manufacturers are providing optimised packaging solutions, working with the packaging lines of retailers to improve the design and remove the unnecessary fillers and space around items within boxes.

**TOO MUCH
PACKAGING HAS
RISEN BY 9%
TO BE CONSUMERS'
TOP PACKAGING
FRUSTRATION**



⁴ <https://www.statista.com/statistics/315506/online-retail-sales-in-the-united-kingdom/>

⁵ <https://www.independent.co.uk/environment/packaging-retailers-uk-adults-chartered-institute-marketing-poll-a9254741.html>

⁶ <https://packhelp.co.uk/bad-packaging/>



The demand for recyclability

43 per cent of respondents named recyclability as a packaging frustration. In addition, when asked to rank seven packaging sustainability topics in order of importance, recyclability, at over 40 per cent, came top by far.

For consumers, recyclability is proving to be the key sustainability issue and leading to a demand for packaging that is easy to recycle. Programmes such as 'The Blue Planet' are impacting on consumer choices, with 88 per cent of people reporting in a recent survey that on watching they had changed their lifestyle⁷.

Sustainability is now central to all packaging and a key driver in consumer decision making and therefore is essential for brands, with companies quite rightly prioritising reducing their impact on the environment.

As an issue, the general concept of packaging recyclability is easily understood by consumers with the benefits of materials contained within the circular economy, maximising efficiencies and minimising waste. However, when it comes to different packaging materials this often get more complex. For example, the wide differences in local authorities pick up in waste collections makes it confusing for consumers and not easy to recycle certain pack formats, even though they can be effectively dealt with.

But sustainability is much more than just that of the recyclability of packaging. However, consumers' views on other environmental issues are perhaps not so clear.

Our survey showed that arguably important issues such as carbon/energy footprint are not well understood, with only seven per cent placing it as the most important issue and 30 per cent in their top three.

43% OF CONSUMERS NAMED RECYCLABILITY AS A PACKAGING FRUSTRATION



⁷ <https://www.globalcitizen.org/en/content/88-blue-planet-2-changed-david-attenborough>



But is sustainability material?

Consumer concerns regarding plastic as a packaging material showed in the survey, with plastic-free ranking in the top three sustainability issues for 56 per cent of consumers.

Given the adverse publicity surrounding plastic, it could be argued that this might have been expected to be higher. Indeed, it might be that views are altering as people see the benefits certain materials deliver and see reports that there is a growing awareness of selecting the right tools for the job and the need for a circular economy approach to packaging⁸.

When asked to rank packaging materials in order of sustainability, paper and cardboard came top with 28 and 23 per cent respectively, followed by glass at 20 per cent. With these materials widely recycled it is likely that this has helped in how they are perceived. It is perhaps interesting that only eight per cent placed aluminium and six per cent steel at the top – similar to the five per cent who chose plastic – meaning that metals were not seen as being as sustainable as glass.

Aluminium cans are made from a large percentage of recycled materials but are not necessarily being recognised as the most eco-friendly solution. Are messages on eco-friendly products overwhelming consumers with multiple caveats and considerations?

The price we pay?

While demand for sustainability in packaging is clear, the willingness for consumers to pay for more sustainable solutions is not. Only one third said they would be willing to pay more for products with sustainable packaging, with two thirds saying no or it would depend on the price. It is likely that sustainability is not necessarily being seen by consumers as an option for brands and their packaging, but simply as a pre-requisite.

***SUSTAINABILITY
IS BEING SEEN BY
CONSUMERS AS
A PRE-REQUISITE
TO PACKAGING –
NOT AN OPTION***



⁸ <https://www.bioregional.com/news-and-opinion/why-going-plastic-free-could-have-environmental-side-effects-and-four-ways-we-can-prevent-this>

Packaging Positives - Here to Protect

2020's survey also asked consumers to identify the positive benefits that they saw packaging deliver, and the overwhelming response was the protection it delivers for the goods we buy, with 61 per cent saying it protects items from getting damaged.

In addition, 47 per cent rated hygiene as one of their top three benefits key and 43 per cent highlighted maintaining freshness and ensuring items remained tamper free.

The role of protection in packaging in a wider sense is therefore seen as a real benefit, and with the challenges delivered by the COVID-19 pandemic the demand for this is clear.

And it would seem that this is particularly so in supermarkets with over 55 per cent saying that COVID has made them either extremely or very concerned about the hygiene of goods from supermarkets.

The ability for others to handle food and beverage items in supermarkets before buying is a concern and other surveys have highlighted a trend of "clean before green" citing 'consumers are buying whatever they can that is packaged in the safest way'⁹.

In addition, there is also a trend for seals and labels designed to show that items have not been opened and this is also emphasising the hygiene at the point of packing or despatch. Pizza Hut is one restaurant using this and helping to answer the concerns of the 48 per cent of people who said they were either extremely or very concerned about the hygiene of goods from takeaways¹⁰.

Waste reduction is a benefit of well-designed packaging, driving sustainability in its protection of goods throughout the supply chain and ensuring they can be consumed and used as intended, avoiding needless overproduction.

In 2018 WRAP research showed we threw away 6.6 million tonnes of household food waste in the UK¹¹. Packaging can help reduce this unnecessary waste by not only protecting items in transit but also keeping it fresh once opened. Adding functionality such as resealability helps in making packs act as a functional store and, when done well, not only keep foods fresh once opened, also helps answering the needs of the 28 per cent of consumers in our survey who are frustrated by packs being difficult to close or reseal.

For this reason, protective packaging is a key trend for 2021 and a growing sector, being both important for retailers as well as consumers as shown in a recent report from Future Market Insights on Retail Ecommerce Packaging.¹²



⁹ https://www.labelandnarrowweb.com/contents/view_online-exclusives/2020-05-19/avery-dennison-identifies-latest-consumer-packaging-trends/

¹⁰ <https://www.today.com/food/pizza-hut-rolls-out-new-tamper-proof-safety-seals-protect-t179041>

¹¹ <https://wrap.org.uk/food-drink>

¹² <https://www.crowdspring.com/blog/packaging-design-trends-2021/>



The bad, the ugly and the good!

In 2013 we asked UK consumers to identify the pack styles they found most frustrating. The list created widespread news coverage and was the launch for our Packaging Resolved campaign, focusing on the opportunity to deliver the perfect pack through both form and function by being easy to open and close, protecting and informing us of the contents inside. In 2020 we took the opportunity to both revisit this question and also ask which packs consumers found most pleasing.

Once again, the issue of easy access to items came to the fore as pack styles without opening devices hit the number two and number three spots in frustrating packs, emphasising the importance that people place on having packaging that they can get into. The number one spot for most frustrating pack style was once again the hard plastic clamshell. It may protect goods through the supply chain and from theft, but it is the most unloved pack style still after seven years – openability is still a frustration!

And the importance of access to packaging could also be seen with the results from the most pleasing pack styles. The number one spot was taken by juice cartons with a screw cap and number two by cans with a ring pull. The demand for easy access and openability is clear – both from the packs that frustrate and the ones that please.

This year's survey also highlighted public perceptions towards plastic packaging. Moving into the top 10 for frustrating packaging were plastic bags, cellophane and wrappers. Undeniably plastic has suffered from the view, particularly for filmic plastic, that it is not sustainable and the challenges and approach across the country for plastic films being recycled here don't help.

However, plastic bottles with screw tops and plastic tubs made it into the top 10 most pleasing packs. These rigid plastic items are often recycled through home collections by local authorities and see high recycling rates¹³. This is likely to see them being perceived more positively and combined with their ease of use, sees them placed into the top 10.

UK Consumer Packaging Survey 2013 / 2020

	 2013	 2020	 2020
1	Clamshells	Clamshells	Juice cartons with screw top
2	Cardboard boxes	Cartons with no opening device	Cans with ring pull
3	Bag/packets	Cans with no opening device	Metal beverage cans
4	Trays with lid	Plastic bags	Plastic bottles with screwtop
5	Envelopes	Cellophane	Glass bottle with screwtop
6	Shrink wrapping	Metal can with opener	Glass jar with metal lid
7	Plastic bottles	Plastic meal container	Glass bottle with pop cap
8	Aseptic packs / cartons	Folded cartons with ties	Plastic tubs
9	Box with ties	Plastic wrappers	Courier mailing envelope
10	Roll Wrap	Stand-up pouches	Bagged cereal boxes

¹³ <https://www.packagingnews.co.uk/news/lockdown-likely-drive-collection-rates-says-recoup-03-12-2020>

Conclusion

Our latest research has shown an improving picture and an understanding of the positive role that well-designed packaging plays in protecting the goods we buy – however it has also highlighted that there is still plenty to do.

Demand for better pack functionality such as easy opening and access still exists and with an ageing population much more needs to be done to combine these features as part of an inclusive pack design, where packaging is suitable for all. In 2021 it should not be that consumers cannot get into the goods they buy – and it is clear that clamshells are still hated!

What has changed is the dramatic growth in e-commerce and the impact that this has had on packaging and its perception by consumers. From the frustration of overpackaging to ensuring protection throughout the supply chain, demands have changed. Sustainability must now be integral to all packaging design and production whatever route it comes to us. Helping consumers understand the nuances however should be a focus, so they are clear on what to do with waste. While recyclability is well understood, wider concepts such as energy or carbon use are not and arguably having a greater impact on the environment.

Education will play a key role and achieving all this will require a joined-up approach from manufacturers, brand owners, retailers, government and consumers.

**IT WILL BE
EXCITING TO SEE
THE IMPROVEMENTS
AS THE INDUSTRY OPENS
UP THE FUTURE
WITH INNOVATIVE
PACKAGING
SOLUTIONS.**



LISTEN

We engage with customers to work out what's needed



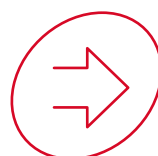
PARTNER

We work alongside our customers as one team



DEPLOY

We develop our solutions to ensure they perform for you



EVOLVE

We build agile capabilities to drive future solutions

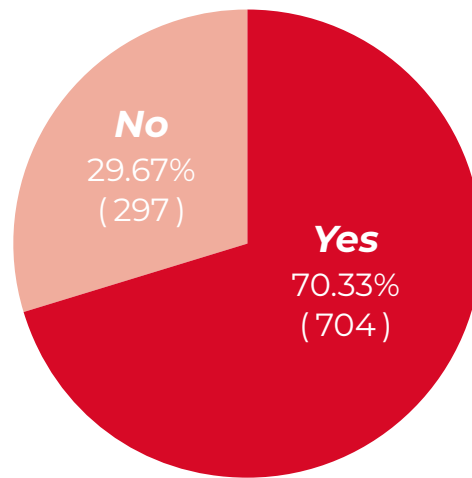




APPENDIX 1 – SURVEY RESULTS

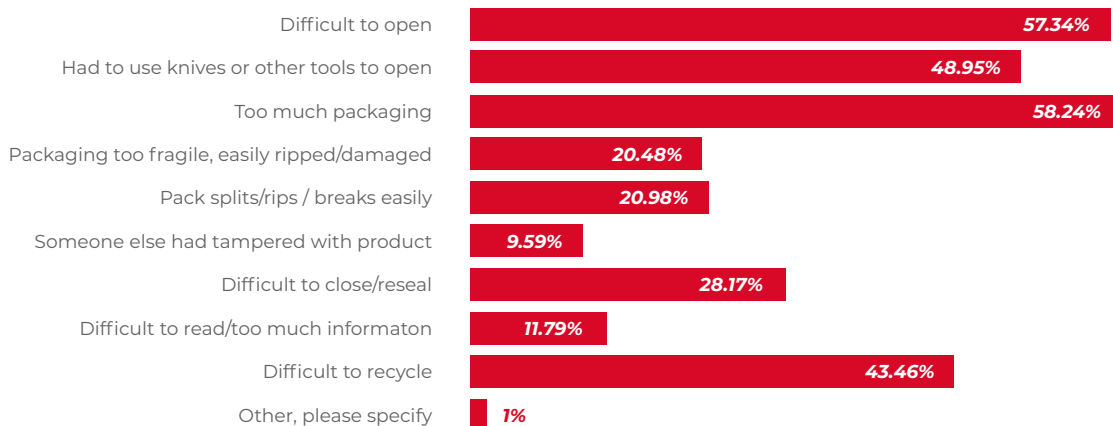
Filtrona Tapes commissioned an independent online survey of 1,000 UK consumers between the ages of 18 to 88 in Q4 2020 regarding their opinions on packaging and building on their initial survey of 500 consumers back in 2013. Full results are shown below:

1. Thinking of packaging you have used recently, have you found any of it frustrating?



Question Type: Single Choice | Total Respondents: 1001

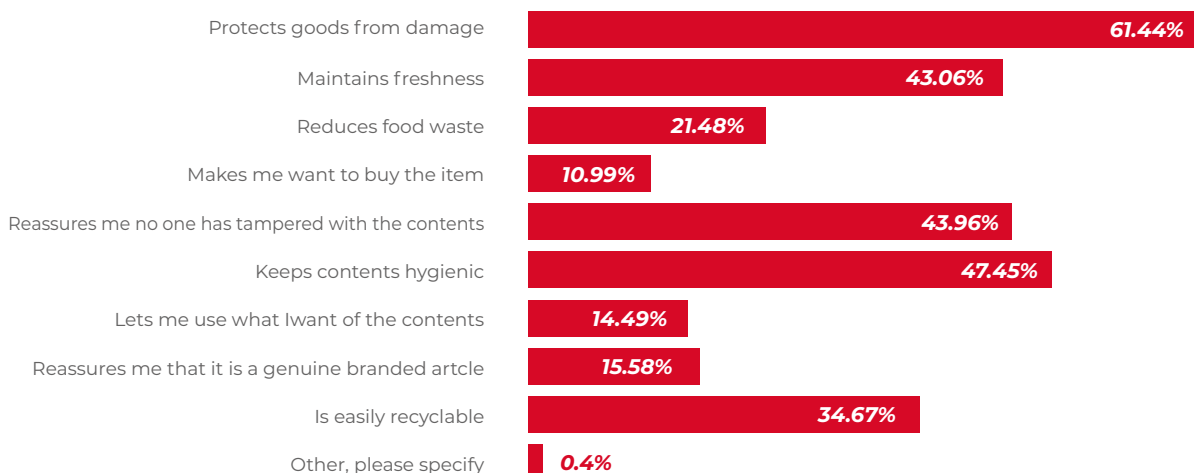
2. Please select the 3 top issues that frustrate you most with packaging



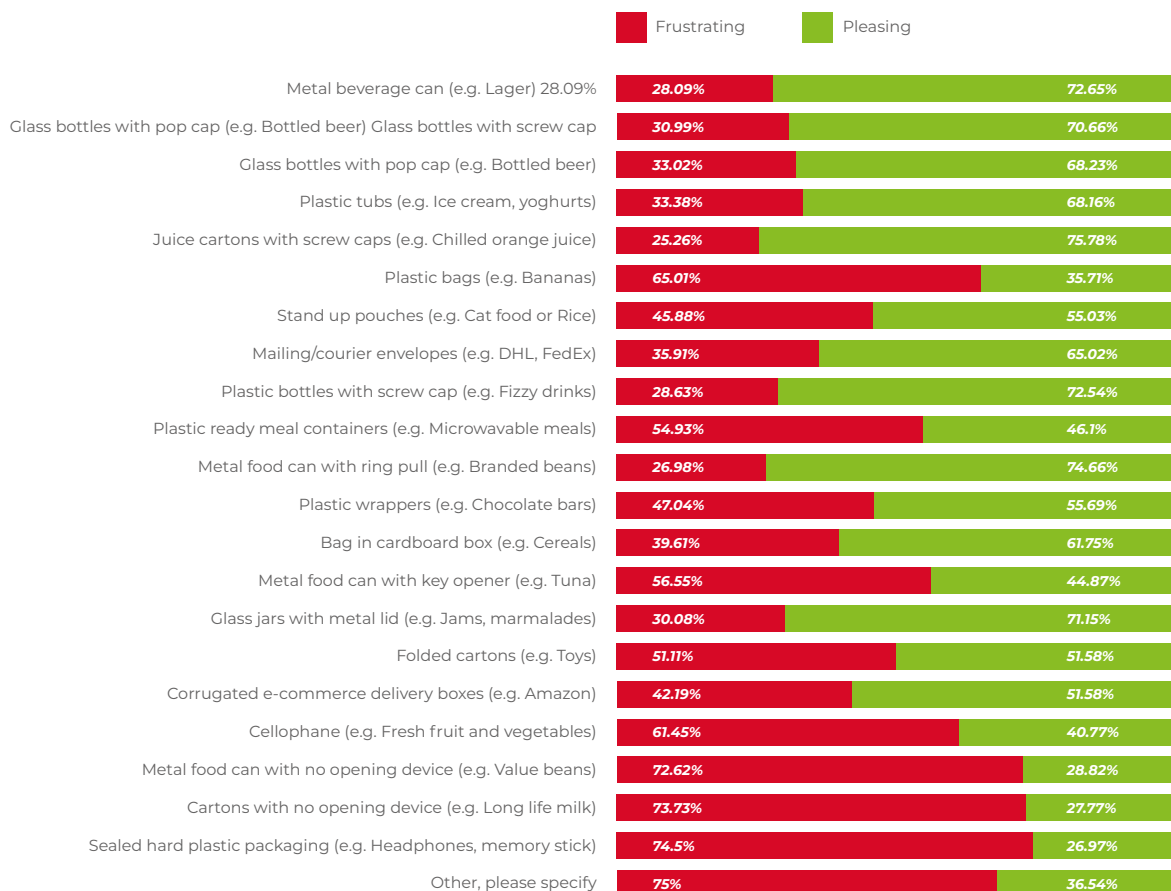
Question Type: Multiple Choice | Total Respondents: 1001



3. Please select 3 positive benefits that you think packaging has?



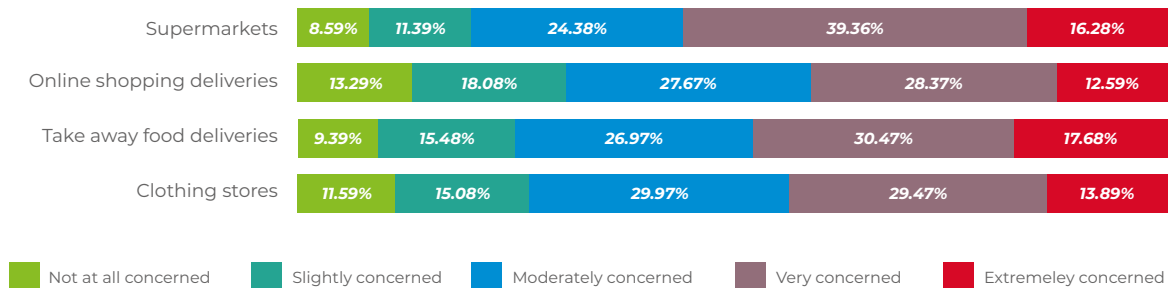
4. Please select the 3 pack styles you find most frustrating and the 3 you find most pleasing:



Question Type: Multiple Cross | Total Respondents: 1001

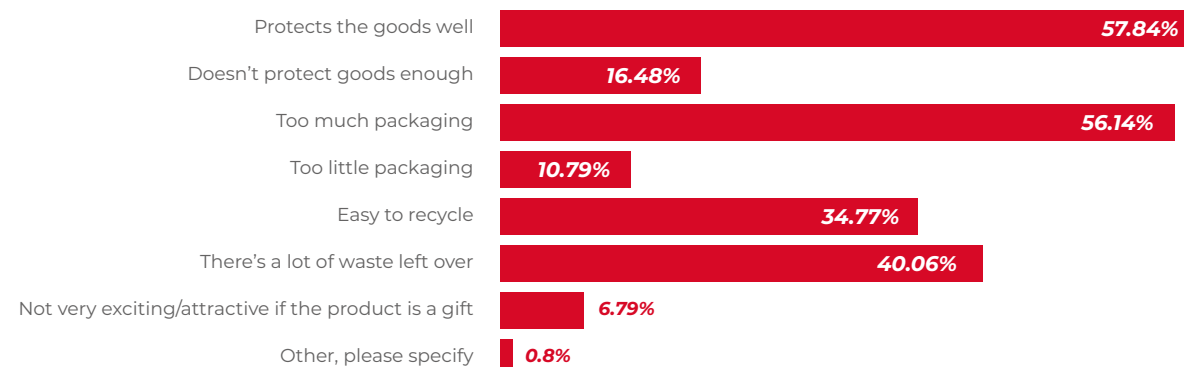


5. Given the pandemic how concerned has COVID made you about the hygiene of goods from the following environments?



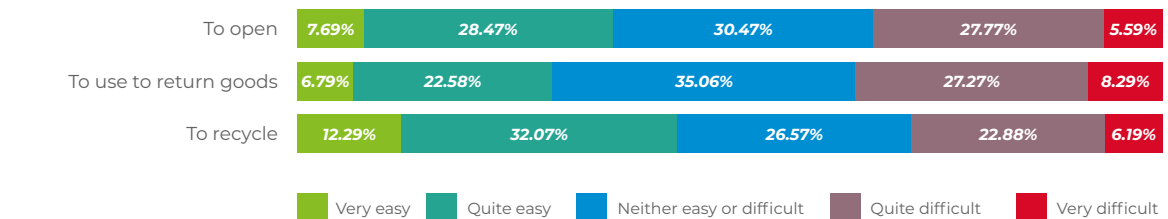
Question Type: Scaled Single Matrix | Total Respondents: 1001

6. With more goods delivered to our homes, what are your thoughts on how the goods are packaged? Select all that apply



Question Type: Multiple Choice | Total Respondents: 1001

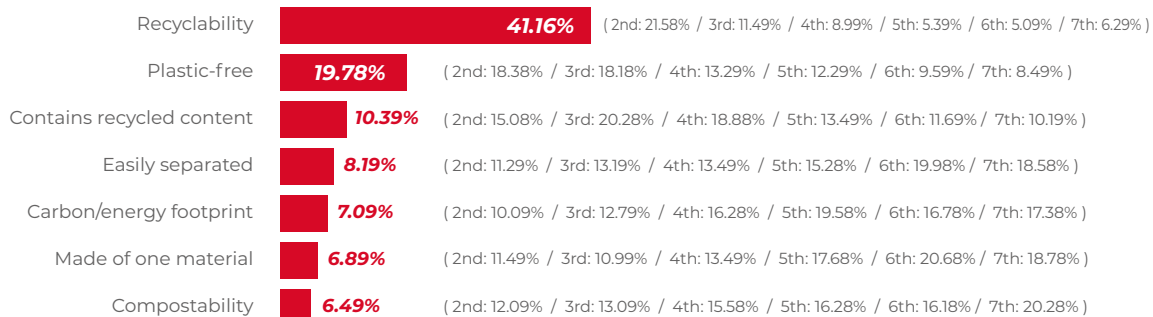
7. How do you find the packaging of goods ordered online and sent to your home:



Question Type: Scaled Single Matrix | Total Respondents: 1001

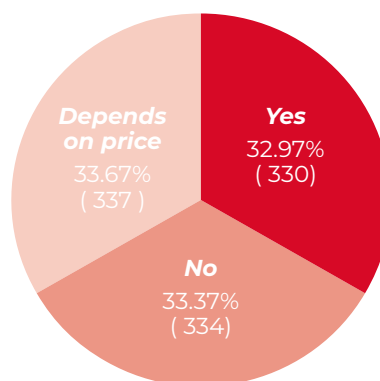


8. Please place the following sustainability topics regarding packaging in order of importance to you:



Question Type: Ranking | Total Respondents: 1001

9. Are you prepared to pay more for products with sustainable packaging?



Question Type: Single Choice | Total Respondents: 1001

10. In your view, please rank the following packaging materials in order of sustainability (best at the top)



Question Type: Ranking | Total Respondents: 1001

OUR LOCATIONS



Manufacturing Locations



Sales Offices



**TALK
TO US**

Filtrona Tapes have over 100 years of history in providing expertise, product enhancement & meeting essential requirements.

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Filtrona