RAISING PACKAGING COMPLIANCE & CAPABILITIES

CONSUMER ACCEPTANCE SURVEY

a report prepared by Mintel for

London Trading Standards Authorities

June 2005

MINTEL consultancy

www.mintel.com consultancy.mintel.com

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Contents

Introduction **1**

Key Report Findings **2**
A preference for less packaging – especially for food products 2
Women are the strongest advocates of reduced packaging 2
Would reduced packaging be more acceptable? 3
Environmental messages not getting through to the young 4

General Attitudes Towards Packaging **5**
Consumers hold firm opinions about packaging… 6
…but 51% feel products sold at Christmas are over packaged 6
Age is also a clear influence on opinions about packaging 8

Packaging Preferences by Product **13**
Significant numbers of consumers would accept less packaging 13
Does gender influence attitudes to packaging? 15
Acceptance levels among under 25s highly polarised 16
Londoners most likely to accept less packaging 18

Should Manufacturers be Encouraged to Reduce Packaging? **20**
Britons clearly want reduced packaging… 20
…but the view is strongest among older ABC1s 21

Appendix 1 – The Views of Londoners **24**
What do Londoners think about packaging? 24
Food packaging a bigger issue with Londoners 25
Londoners place less emphasis on packaging when gift purchasing 26
…but Londoners seem to want to 'pamper' themselves 26
Londoners on a par with attitudes towards packaging reduction 28

Appendix 2 – Packaging Preferences for Products Bought as Presents **29**
Over egging Easter packaging? 29
Active British shopper attitudes towards packaging 30

Appendix 3 – Packaging Preferences for Products Purchased for Personal Use **32**
Less packaging more acceptable for those buying for themselves 32
Preferences among those who have recently purchased relevant products 34

Appendix 4 – Types of Purchases Made **35**
Four in five Brits buy personal care products 35
Younger respondents lead the way with DVDs 37

Appendix 5– Complimentary Packaging Acceptance Data (all respondents) **38**

Appendix 6 – Research Methodology **44**

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Introduction

This research has been undertaken by Mintel on behalf of London Trading Standards Authorities (LoTSA) between May and June 2005, to gain an understanding of what consumers perceive to be ‘acceptable packaging’, in the wake of the Packaging (Essential Requirements) Regulations 2003. The legislation, with which all new packaging must comply, is intended to reduce levels of packaging, but is contingent on what is ‘acceptable’ to consumers. This last requirement is highly contentious as it is largely subjective and there is little published research available addressing the issue of consumer ‘acceptability’ of packaging for different types of products, although previous research has shown that consumers do consider that many goods are over-packaged.

For example, Mintel’s report entitled Food & Drink Packaging (April 2003) found an increase in the number of people agreeing with the statement that ‘most food has too much packaging’ between 2000 and 2003. More recently, Envirowise reported that 36% of consumers think that products aimed at Christmas shoppers are over-packaged, with 65% suggesting that they try to buy as few ornately packaged goods as possible over the festive season (Retail Week, Dec 2004).

The objective of this research is to provide a more detailed understanding of what consumers’ deem to be acceptable packaging for a range of frequently bought goods. This report addresses consumer acceptance of packaging, and therefore compliant with consumer needs, which is required by current legislation.

This survey explores general attitudes to packaging amongst consumers and also focuses in on ‘consumer acceptance’ of packaging for a number of key products, agreed with LoTSA.

A nationally representative sample of 2,000 was interviewed during May 2005, by NOP and respondents were shown photographs of a selection of products readily available on the high street, with their original packaging and in a reduced packaging format, closely based on the original pack design. The data has been analysed by age, gender and social class and has also been shown for London, as well as the national picture. A more detailed overview of methodology can be found in the appendix.

Key Report Findings

A preference for less packaging – especially for food products

The research found a high level of interest in the principle of reducing packaging amongst the general population and more specifically amongst people who are actual purchasers of the specific types of product reviewed. This was true of food products (which were not the prime focus of this research, because of the more complex health and safety issues in connection with food) as well as non food products. Over half of the nationally representative sample claimed to be in favour of reduced packaging for food products bought from a supermarket; with a similar percentage also supporting the notion of less packaging for non food products bought from a supermarket.

Not only are many commonly bought products thought to be over-packaged, but over half the sample of people interviewed were in agreement with the statement that packaging often gives a misleading impression of the amount of goods supplied. Whilst some 47% of the sample would welcome a reduction in packaging if it would lead to lower prices, this was not the main reason underpinning interest in lower usage of packaging.

Christmas – the key purchasing peak for most types of merchandise is a time when many manufacturers produce even more elaborately seasonal packaging to boost impulse purchasing, especially for present giving – a contentious issue, as most Christmas packaging ends up in the bin over the Christmas period. However, again, just over half of the nationally representative sample supported the view that packaging on Christmas gifts is often excessive.

Women are the strongest advocates of reduced packaging

When it comes to support for a reduction in packaging, women tend to display a higher level of support than men. This may partly reflect the fact that women are the primary shoppers in most consumer markets, whether for everyday food and grocery shoppers or for the special occasion shopping such as at Christmas and for birthdays and therefore perhaps have more exposure to packaging than men. The gender difference was particularly acute in the case of food.

There were also some striking socio-economic and regional differences in attitudes to packaging, in the main AB householders were more strongly in favour of reducing levels of packaging, while in general across the country, Londoners were more in favour of reducing levels of packaging. However the major determinant of attitudes to packaging is age – with younger people, under the age of 35 significantly less likely to be interest in issues in support of packaging reduction.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Would reduced packaging be more acceptable?

During the research process, the nationally representative sample were shown photographs of a range of products packaged in their original packaging, as found in the high street, with an alternative. The alternative was either a digitally reduced version of the same packaging or in some instances with no packaging, to ascertain which of the two options would be most acceptable to consumers – in the spirit of the current legislation. Respondents were asked to consider which packaging format would be the most acceptable if they were buying the product firstly for their own use and secondly as a present for someone else.

The findings demonstrated that in all cases a significant number of people who had bought this type of product, would be prepared to accept the reduced packaging option. The highest level of support for reduced packaging was for the Easter Egg, where the packaging for the example shown comprised several different packaging components. Reduced packaging was also acceptable amongst purchasers of computer peripherals, DVDs, DIY tools, toys and skincare.

Whereas there was an expectation that consumers would be more accepting of packaging reductions when buying products for their own personal consumption, this was not always the case. For some packaging examples the reverse was true, with more purchasers voting for reduced packaging on pens, jewellery, toys and computer peripherals when being bought for someone else. Even though most Easter Eggs are bought for someone else to consume, over two thirds of the nationally representative sample of Easter Egg purchasers were in favour of reducing the packaging if the egg was being bought as a present. Some 80% of computer peripheral purchasers would be prepared to accept less packaging for a PC mouse when bought for their own use. Whilst this data is not conclusive, it does reaffirm the findings of the earlier question that consumers would be prepared to accept reduced packaging on products being bought as a present.

Finally, respondents were directly questioned as to whether or not they agreed with the statement that manufacturers should be encouraged to reduce the amount of packaging used. Here, there was little room for ambiguity, with well over nine in ten agreeing with the statement. Indeed, almost two thirds strongly agreed, showing a strong groundswell of opinion in favour of cutting packaging. Again, agreement was strongest among the more affluent, while the youngest consumers tended to be most likely to disagree with the statement. However, even among those most lukewarm to the notion of encouraging manufacturers to reduce packaging, the under-25s, more than four fifths were in support of the statement.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Environmental messages not getting through to the young

The contrasting attitudes to packaging shown by the under 35s and the over 35s was striking. Whist the younger respondents have been brought up during a period of massive consumer choice and a proliferation of marketing messages and brand options, in general the environmental case for reducing packaging is not getting through to the young. This was especially true of the teenage group, suggesting that trading standards authorities should be focusing more closely on how resource materials could be provided as part of the national curriculum to improve the understanding of the levels of wastage caused by excess packaging.

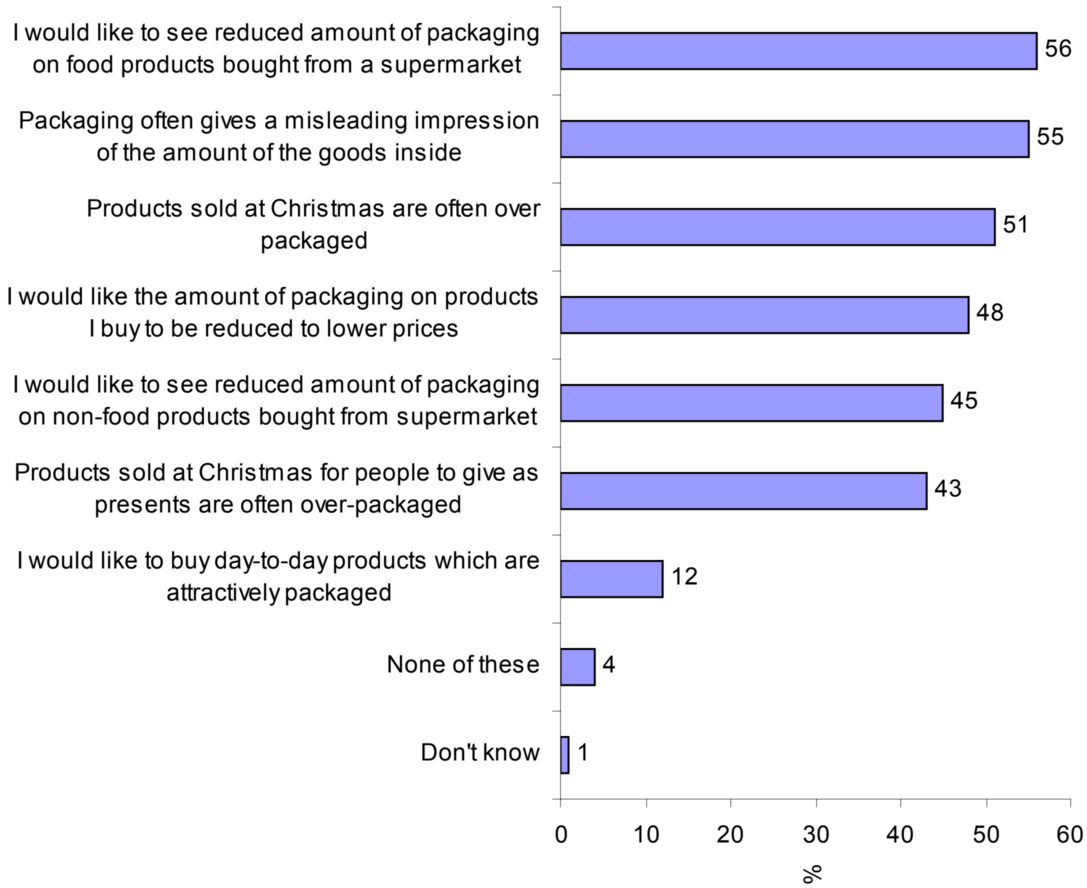
For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

General Attitudes Towards Packaging

Before enquiring about specific types of purchases and attitudes of packaging for particular products, the sample of 2,000 adults were asked questions about their general attitudes towards packaging. Figure 1 shows the proportion of the sample who agreed with each statement.

Figure 1 Attitudes towards packaging, May 2005

"Which, if any, of the following statements do you agree with?"



Source: NOP/Mintel

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Consumers hold firm opinions about packaging…

- Whilst food packaging has not been a central focus for this research, because of the need for packaging for food safety and hygiene reasons; over half the nationally representative sample (56%) would like to see a reduction on packaging used on food products bought from a supermarket.

- Of the sample, 45% would like to see packaging reduced on non food products bought from a supermarket.

- Equally prominent were the number of consumers who agreed that packaging often gives a misleading impression of the amount of goods inside.

- Just under half the sample (48%) would like to see packaging reduced if it would lead to lower prices. Indeed relatively few people valued the aesthetics of packaging, with only 12% of the sample agreeing that they like to buy day-to-day products which are attractively packaged.

…but 51% feel products sold at Christmas are over packaged

- Gift packaging is a contentious issue, especially the amount of packaging which ends up in the bin over the Christmas period. One in two people agree that products sold at Christmas are often over packaged.

- When analysing the responses to these statements by gender and social class, several interesting trends prevailed.

- In general women appear to have stronger views about packaging than men, with women more likely than men to believe that many goods are over packaged. This is especially the case when it comes to food packaging in supermarkets, with women – still the primary food shoppers in most households, were five percentage points more likely to agree with this statement.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Figure 2 Attitudes towards packaging, by gender, May 2005

"Which, if any, of the following statements do you agree with?"

	All %	Men %	Women %
I would like to see a reduced amount of packaging on food products bought from a supermarket	56	53	58
Packaging often gives a misleading impression of the amount of the goods inside	55	53	57
Products sold at Christmas are often over packaged	51	50	52
I would like the amount of packaging on products I buy to be reduced to lower prices	48	48	47
I would like to see a reduced amount of packaging on non-food products bought from a supermarket	45	44	45
Products sold at Christmas for people to give as presents are often over-packaged	43	40	46
I would like to buy day-to-day products which are attractively packaged	12	13	11
None of these	4	5	3
Don't know	1	1	1

Source: NOP/Mintel

- There are significant attitudes to packaging by social class; people in the ABC1 social groups are the most likely to be critical of levels of packaging and what to see a reduction on both products bought for every day use and for gifts.

Figure 3 Attitudes towards packaging, by socio-economic group, May 2005

"Which, if any, of the following statements do you agree with?"

	All %	AB %	C1 %	C2 %	D %	E %
I would like to see a reduced amount of packaging on food products bought from a supermarket	56	68	58	50	50	50
Packaging often gives a misleading impression of the amount of the goods inside	55	65	60	53	47	46
Products sold at Christmas are often over packaged	51	55	53	53	46	45
I would like the amount of packaging on products I buy to be reduced to lower prices	48	55	53	46	40	40
I would like to see a reduced amount of packaging on non-food products bought from a supermarket	45	56	47	41	37	38
Products sold at Christmas for people to give as presents are often over-packaged	43	48	44	44	38	37
I would like to buy day-to-day products which are attractively packaged	12	13	11	13	9	14
None of these	4	3	3	5	3	6
Don't know	1	1	1	1	1	2

Source: NOP/Mintel

Age is also a clear influence on opinions about packaging

- As with socio-economic class, there is a clear tendency for older consumers, especially in the 55-64 age group, to have stronger opinions about packaging issues than their younger counterparts. Across most statements the level of response (those agreeing with the statements) oscillated around the 60% mark.

- In contrast, the younger age groups were far less likely than the national average to agree with the statements about excessive packaging or reductions in packaging, which suggests that increased educational awareness on environmental issues amongst the young is required, using marketing activity which young people engage with.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

- By way of example, 59% of adults aged 55-64 – compared to the national average of 45% – would like to see a reduction in packaging used for non-food products bought in supermarkets. However, only 23% of those under 20 agreed with this view.

- The older generation also appear to be more conscientious about price and the influence packaging might have on price points. Three in five, or 60% of, respondents aged between 55 and 64 would like to see the amount of packaging reduced so that prices could be lowered, which is markedly higher than the national average of 48% or 28% for those aged under 20 years.

- The importance placed upon the attractiveness of packaging is relatively even across all age groups, with the stark exception of those aged under 20, where the statement relating to this appealed to 20% (compared to 12% for the national average). Having attractive packaging for everyday purchases is not a high priority for the majority of consumers.

Figure 4 Attitudes towards packaging, by age, May 2005

"Which, if any, of the following statements do you agree with?"

	All	15-19	20-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%	%	%
I would like to see a reduced amount of packaging on food products bought from a supermarket	56	33	48	49	62	63	60	57
Packaging often gives a misleading impression of the amount of the goods inside	55	41	51	50	61	60	64	50
Products sold at Christmas are often over packaged	51	41	41	41	54	60	61	51
I would like the amount of packaging on products I buy to be reduced to lower prices	48	28	35	43	52	51	60	50
I would like to see a reduced amount of packaging on non-food products bought from a supermarket	45	23	30	37	49	47	59	50
Products sold at Christmas for people to give as presents are often over-packaged	43	34	24	37	45	51	55	42
I would like to buy day-to-day products which are attractively packaged	12	20	11	11	9	12	13	12
None of these	4	5	7	6	2	2	3	5
Don't know	1	4	2	0	1	1	1	2

Source: NOP/Mintel

- In terms of geographical location, there is a clear north-south divide about attitudes towards food packaging bought from supermarkets. People living in London and the South are almost ten percentage points more likely than the national average to want reduced amounts of packaging used for food sold in supermarkets. In stark contrast, those living in Scotland, the Northwest and especially Yorkshire & the Northeast are far less concerned.

- When asked about non-food packaging, however, the trend in responses differed. Only in the South did consumers noticeably wish to see reduced packaging (63%, compared with the national average of 45%).

- The desire to have less packaging, if this leads to lower prices, is most prominent among those living in the South, Anglia and the Midlands. Londoners, however, appear to be least concerned about the influence of packaging upon price.

- Equally, Londoners are least likely to agree that products sold at Christmas for people to give as presents are often over-packaged (nine percentage points lower than the national average, and 20 percentage points lower than those living in the South.

- However, it is the Scottish consumers who most strongly support the view that products sold at Christmas are often overpackaged (seven percentage points higher than the national average and 10 percentage points higher than those living in London).

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Figure 5 Attitudes towards packaging, by TV area, May 2005

"Which, if any, of the following statements do you agree with?"

	All	London	South	Anglia/Midlands	Southwest	Yorkshire/Northeast	Northwest	Scotland
	%	%	%	%	%	%	%	%
I would like to see a reduced amount of packaging on food products bought from	56	64	65	61	55	44	48	48
I would like to see a reduced amount of packaging on non-food products bought	45	42	63	47	46	41	44	35
Products sold at Christmas are often over packaged	51	48	56	56	50	50	41	58
Packaging often gives a misleading impression of the amount of the goods	55	50	60	55	58	55	56	57
I would like to buy day-to-day products which are attractively packaged	12	15	14	11	7	13	10	10
I would like the amount of packaging on products I buy to be reduced to lower	48	40	54	54	41	46	49	50
Products sold at Christmas for people to give as presents are often over-	43	34	54	45	45	46	39	44
None of these	4	2	2	4	3	5	5	5
Don't know	1	1	1	1	2	1	2	-

Source: Mintel/NOP

Packaging Preferences by Product

- This section examines packaging attitudes of consumers who have purchased a relevant product within the last 12 months. As active customers, their views on packaging carry much more weight than those of the wider general public

- Each respondent was shown two images of selected products. One showed the product with its original packaging (ie as currently sold), while the other showed an amended version of the same product but with less packaging.

- The following charts demonstrate the degree to which respondents (who had purchased such a product within the last 12 months) desire less packaging, comparing views when the products are bought for themselves and when purchased as a gift for someone else.

- Further along, the charts examine in more detail the socio-demographic composition of these consumers, highlighting consumers who would accept having less packaging on commonly bought goods.

- In the appendix, there are additional tables, detailing individual responses about packaging for each product, depending upon whether purchasing as a gift or for oneself, but regardless of whether they had actually purchased the product within the last year or not.

Significant numbers of consumers would accept less packaging

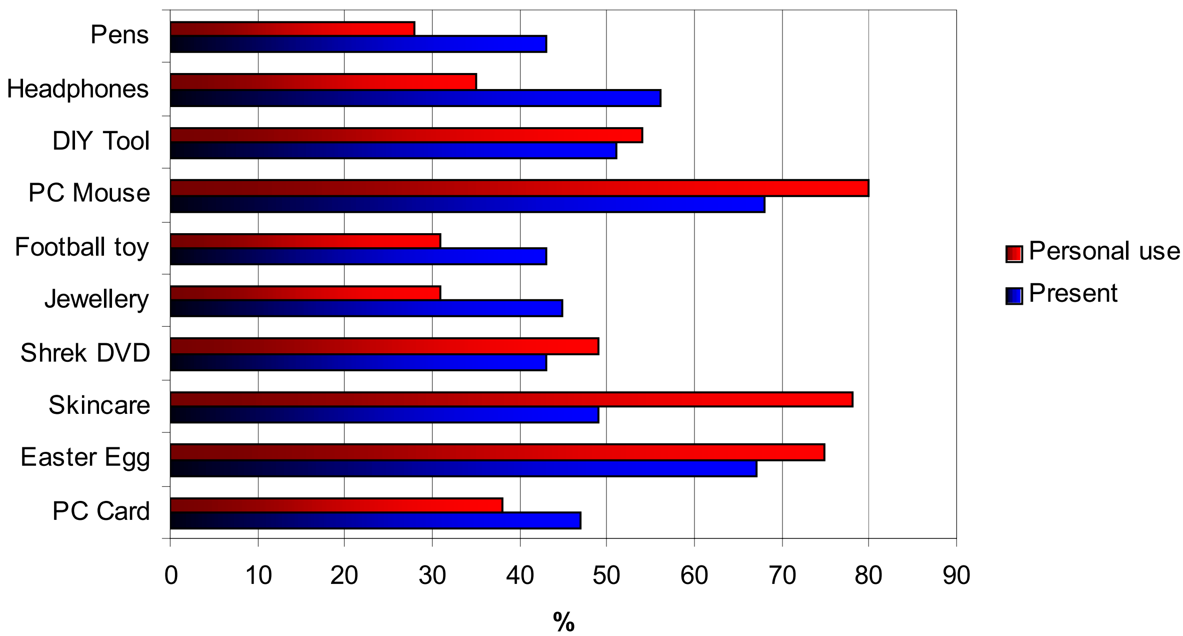
- It might be assumed that in general people may opt for less packaging when buying for themselves than for someone else, especially if an item was being bought as a present – as in the case with most toys. However the data below suggests that this assumption can be questioned – people are prepared to accept less packaging when buying merchandise as a present for somebody. Two products – the Easter egg and the PC mouse – stand out as product s which consumers are most accepting of less packaging, regardless of whether the product is purchased for personal use or as a gift for someone else.

- Across the ten products demonstrated during research, four were identified by the majority of respondents as ones where less packaging would be accepted when purchasing for personal use. In descending order, these are PC mouse (80%), skincare product (78%), Easter egg (75%) and the DIY tool (54%).

- The largest disparity in attitudes towards packaging when considering the reason for purchase occurred with the skincare product. While half of the purchasers of this product category, who had purchased this product within the last year were inclined to accept less packaging when buying as a gift, this proportion rises to four in five consumers when purpose for purchase is for personal use, representing an increase of 29 percentage points.

- While 35% of recent purchasers would accept less packaging for the set of headphones when purchasing this for themselves, 56% would actually accept less packaging if the headphones were bought as a gift for someone else. Interestingly, this theme also holds true for other higher priced products, including the pen, PC card and jewellery piece. This result could be taken to demonstrate that many consumers would be prepared to accept a reduction on packaging on products with a higher price point, such as technology products or gifts, such as jewellery and pens.

Figure 6 Consumer acceptance of less packaging, by product, May 2005 *



Source: Mintel/NOP
*Note: * of consumers who had purchased a similar product within the last year*

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Does gender influence attitudes to packaging?

- On first inspection, there appear to be few clear demographic correlations between gender and attitudes towards packaging, although variation in response by social class was more pronounced, with key differences from the norm highlighted in bold in Figure 7 below. That said, when purchasing for themselves, men are much more likely than women to accept less packaging for pens and PC cards.

- In terms of social class, ABC1s are more accepting of less packaging used for the Easter egg, skincare product and Shrek DVD, regardless of reason for purchase, than the national average. In terms of jewellery, however, purchasers form higher social economic groups are less likely to accept the use of less packaging, both when purchasing as a present or for personal use.

Figure 7 Consumer acceptance of less packaging, by product, gender and social class, May 2005 *

		All	Men	Wom-en	AB	C1	C2	D	E
		%	%	%	%	%	%	%	%
PC Card	Present	47	**49**	43	48	43	44	49	**60**
	Self	38	**42**	32	37	37	41	33	**44**
Easter Egg	Present	67	64	**69**	**73**	69	69	59	60
	Self	75	72	**77**	**81**	75	75	75	64
Skincare	Present	49	50	48	**55**	51	47	41	46
	Self	78	77	78	**84**	77	79	75	71
Shrek DVD	Present	43	**41**	45	**46**	45	42	36	41
	Self	49	48	50	**54**	50	**50**	44	44
Jewellery	Present	45	**48**	43	42	44	**50**	44	44
	Self	31	33	29	27	30	**34**	28	38
Football toy	Present	43	43	43	38	**46**	36	40	**58**
	Self	31	**34**	29	26	33	26	28	**48**
PC Mouse	Present	68	66	**71**	**75**	69	61	64	57
	Self	80	77	**84**	**85**	81	80	75	63
DIY Tool	Present	51	49	52	53	50	52	49	44
	Self	54	54	55	53	54	**59**	56	46
Headphones	Present	56	56	55	53	56	51	**61**	**61**
	Self	35	**37**	32	36	33	33	31	46
Pens	Present	43	43	43	41	47	42	43	42
	Self	28	**34**	24	25	**31**	27	27	**31**

Source: Mintel/NOP
*Note: * of consumers who had purchased a similar product within the last year*

Acceptance levels among under 25s highly polarised

- On average, this research demonstrates that younger consumers – especially those aged under 25 years – are less accepting of the packaging reduction examples shown in the research. However, there are some notable exceptions to this, namely for the higher ticket items, and especially when these items are purchased to give as a gift. These products include, for example, the headphones, PC card, jewellery and pen. To demonstrate the degree to which views change, 84% of those under 20 would accept less packaging for headphones when purchased as a gift, which is significantly higher than consumers aged over 35 years.

- One would expect customers to want elaborate packaging for a piece of jewellery, especially when purchased as a gift, but this trend is much more prominent in the over 55 year olds. This might in part be simply due older consumers holding more traditional views, but it might also hinge around the inherent value placed on jewellery items, and indeed the higher average price paid per item (compared to younger generations).

- There is a notable increase in acceptance of less packaging for the Shrek DVD among consumers aged over 35, whilst the under 35s – the key target market for the majority of DVDs in the main preferred the original packaging – when buying for their own use and as a present.

Figure 8 Consumer acceptance of less packaging, by product, reason for purchase and by age, May 2005 *

		All	15-19	20-24	25-34	35-44	45-54	55-64	65+
		%	%	%	%	%	%	%	%
PC Card	Present	47	**68**	49	40	47	45	47	**50**
	Self	38	**62**	36	38	34	34	34	**48**
Easter Egg	Present	67	53	44	62	69	**78**	**83**	63
	Self	75	57	69	74	**79**	**79**	**82**	68
Skincare	Present	49	37	33	50	52	**54**	50	50
	Self	78	67	67	77	**83**	**85**	**81**	73
Shrek DVD	Present	43	17	20	34	**50**	**55**	**57**	**55**
	Self	49	27	25	42	**57**	**60**	**63**	**56**
Jewellery	Present	45	**64**	**61**	**53**	**46**	38	28	31
	Self	31	**35**	**44**	31	28	27	24	**35**
Football toy	Present	43	**55**	**55**	43	43	38	38	38
	Self	31	25	**44**	33	29	26	29	32
PC Mouse	Present	68	47	45	**71**	68	**80**	**73**	64
	Self	80	58	64	82	**84**	**86**	83	81
DIY Tool	Present	51	28	30	45	**55**	**58**	**56**	49
	Self	54	36	48	42	**58**	**59**	**58**	**62**

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Headphones	Present	56	**84**	**68**	58	47	49	49	46
	Self	35	**52**	**51**	38	24	30	31	37
Pens	Present	43	**57**	**49**	**46**	43	35	41	36
	Self	28	**43**	**36**	**33**	23	20	28	25

Source: Mintel/NOP
*Note: * of consumers who had purchased a similar product within the last year*

Londoners most likely to accept less packaging

- Those living in London are more accepting of less packaging, in comparison to the national average, when considering many the examples, including the PC card, jewellery, DIY tool, headphones and, when purchased as a gift, the Shrek DVD.

- When purchasing for themselves, those living in Scotland are most likely to accept less packaging for the PC card, football toy and pen.

- In terms of present buying, packaging appears to be less important for Londoners – those living in this region opted for less packaging across seven of the ten products. In contrast, those living in the Southern television region we less likely to accept less packaging for products purchased as a present. The one notable exception for this latter region, is the PC mouse – 79% (compared to 68% for the national average) would accept less packaging for this product when purchased to give a gift.

- The disparity between packaging acceptance levels, when considering the reason for purchase, is clearly the strongest in Yorkshire.

Figure 9 Consumer acceptance of less packaging, by product and by TV region, May 2005 *

		All	London	South	Anglia/ Midlands	South-west	Yorkshire /North-east	North-west	Scotland
		%	%	%	%	%	%	%	%
PC Card	Present	47	**52**	39	42	**52**	43	49	44
	Self	38	**41**	32	31	**41**	35	36	**50**
Easter Egg	Present	67	68	**75**	66	**71**	61	60	**72**
	Self	75	71	**81**	74	**78**	75	77	67
Skincare	Present	49	**52**	50	49	**53**	41	50	46
	Self	78	74	**81**	80	81	**83**	77	68
Shrek DVD	Present	43	**51**	41	45	36	32	48	37
	Self	49	50	**52**	**51**	48	43	**58**	40
Jewellery	Present	45	**50**	43	39	39	**50**	**48**	44
	Self	31	**38**	27	24	28	29	**39**	33
Football toy	Present	43	43	29	45	44	**47**	44	44
	Self	31	33	25	31	28	26	37	**39**
PC Mouse	Present	68	60	79	70	**74**	67	65	57
	Self	80	75	81	82	82	**87**	73	82
DIY Tool	Present	51	**57**	44	**57**	52	52	42	33
	Self	54	**57**	**57**	55	51	53	55	47

Headphones	Present	56	**61**	50	49	51	**61**	58	**64**
	Self	35	41	33	33	34	24	**47**	40
Pens	Present	43	41	40	33	45	**50**	48	**54**
	Self	28	**32**	29	22	25	25	34	**40**

Source: Mintel/NOP
*Note: * of consumers who had purchased a similar product within the last year*

Should Manufacturers be Encouraged to Reduce Packaging?

Britons clearly want reduced packaging…

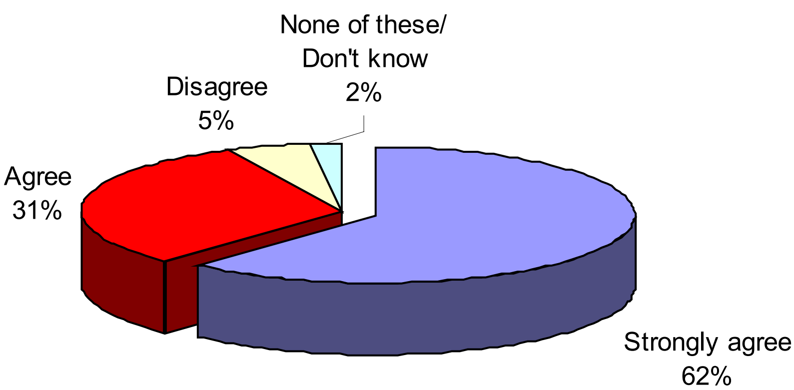
- Whilst a significant proportion of the population would be prepared to consider reduced packaging when presented with a reduced variant of the original packaging, an overwhelming majority of consumers agreed in principle that manufacturers should be encouraged to reduce the amount of packaging used.

- Even more encouraging for the support of this statement is the fact that almost two-thirds strongly agreed with this objective.

- Only 5% of British consumers actually disagreed with the statement.

Figure 10 Agreement with the statement "Manufacturers should be encouraged to reduce the amount of packaging used", May 2005

Base: 1,971 adults



Source: NOP/Mintel

…but the view is strongest among older ABC1s

- There is little difference in terms of gender, when looking more closely at the socio-demographic composition of respondents agreeing with this statement.

- The age of respondents, however, tells a different story. Those aged over 35 are more likely to strongly agree that manufacturers should be encouraged to reduce packaging, peaking at 73% among 55 to 64 year olds.

- In contrast, those under 35 were less likely to hold such strong views on the issue, instead opting to only agree as opposed to strongly agree.

- However, those not agreeing with the statement tended to be under the age of 24, suggesting that younger consumers are much less adverse to packaging, which probably stems from the lower awareness of costs (product, environmental etc) generated from packaging.

- To support this view, analysis of the data by socio-economic groupings shows that the amount of people disagreeing with the statement increases the further down the scale one looks. In contrast, those most likely to strongly agree are ABC1s.

Figure 11 Agreement with the statement "Manufacturers should be encouraged to reduce the amount of packaging used", by gender, age and socio-economic group, May 2005

Base: 1,971 adults

	Strongly agree %	Agree %	Don't agree %	None of these %	Don't know %
All	62	31	5	1	1
Gender					
Men	61	30	6	2	1
Women	62	31	5	1	1
Age group					
15-19	41	44	11	2	3
20-24	42	41	13	4	-
25-34	52	41	4	2	2
35-44	68	27	3	1	1
45-54	71	23	3	1	2
55-64	73	23	2	1	1
65+	63	29	6	1	1
Socio-economic group					
AB	67	26	3	2	2
C1	65	28	4	1	1
C2	61	33	4	2	1
D	56	35	6	1	2
E	54	34	10	1	2

Source: NOP/Mintel

Figure 12 **Agreement with the statement "Manufacturers should be encouraged to reduce the amount of packaging used", by TV area, May 2005**

	All	London	South	Anglia & Midlands	Southwest & Wales	Yorkshire & Northeast	Northwest	Scotland
I strongly believe that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street	62	60	71	63	65	55	62	55
I believe that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street	31	31	24	27	27	41	30	36
I don't believe that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street	5	4	4	6	5	3	5	6
None of these	1	1	1	3	2	0	2	2
Don't know	1	3	1	1	1	0	1	0

Source: NOP/Mintel

Appendix 1 – The Views of Londoners

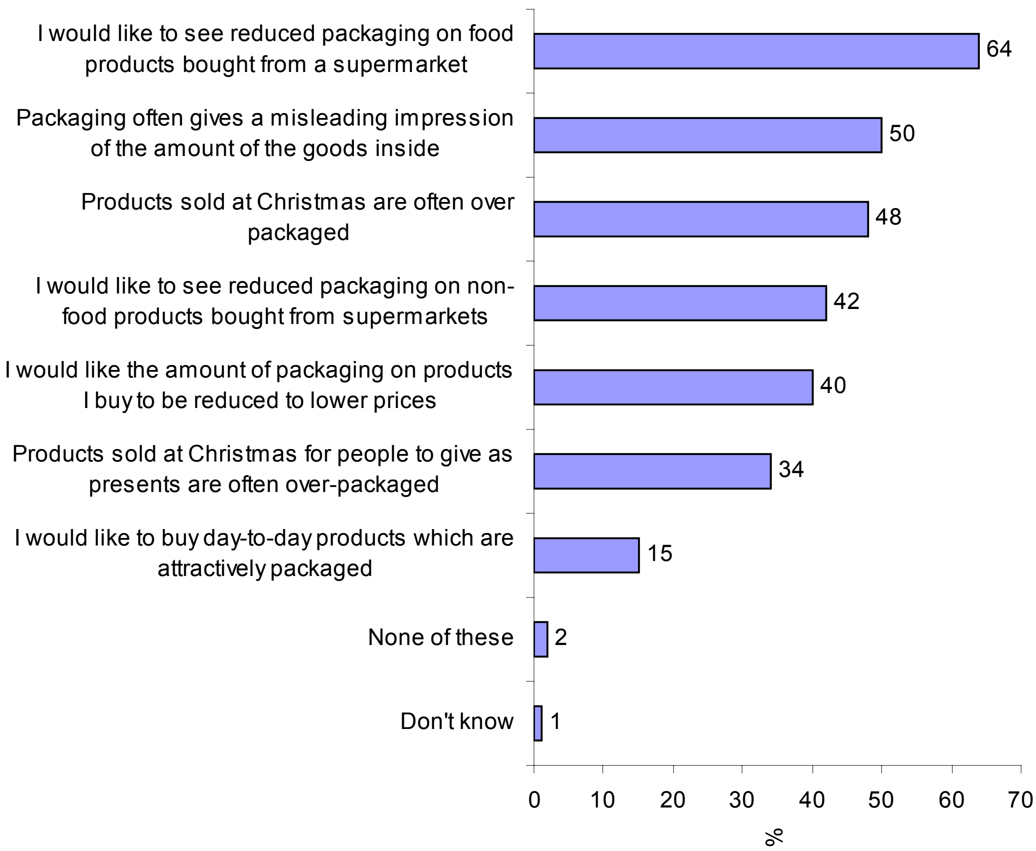
What do Londoners think about packaging?

- Almost two-thirds of Londoners would like to see reduced packaging on food products sold in supermarkets. Furthermore, one in two Londoners feel that packaging often gives a misleading impression of the amount of goods inside.

- 48% of Londoners agree that products sold at Christmas are often over packaged. Even one-third of Londoners felt products sold at Christmas, intended for people to give as gifts, are overpackaged.

Figure 13 Attitudes towards packaging among Londoners, May 2005

"Which, if any, of the following statements do you agree with?"
Base: 396 Londoners



Source: Mintel/NOP

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Food packaging a bigger issue with Londoners

- Only 3% of Londoners (compared to 5% for the national average) did not agree with (or know about) any of the statements, which suggests that Londoners hold marginally stronger views about packaging issues than the national average.

- However, when viewing the results for each attitudinal statement, clear regional trends emerge. Almost two-thirds of Londoners would like to see reduced packaging on food products bought from a supermarket, eight percentage points higher than the national average. However, packaging around non-food items is less of an issue to Londoners; only 42% of Londoners (compared to 45% for the national average) would like to see a reduction of packaging used for non-food products.

- In reflection of UK regional salaries and house prices, Londoners appear to be less price sensitive, especially with regards to their views on packaging. Only 40% of Londoners are keen on reducing packaging if this leads to lower prices, which is eight percentage points lower than Great Britain as a whole.

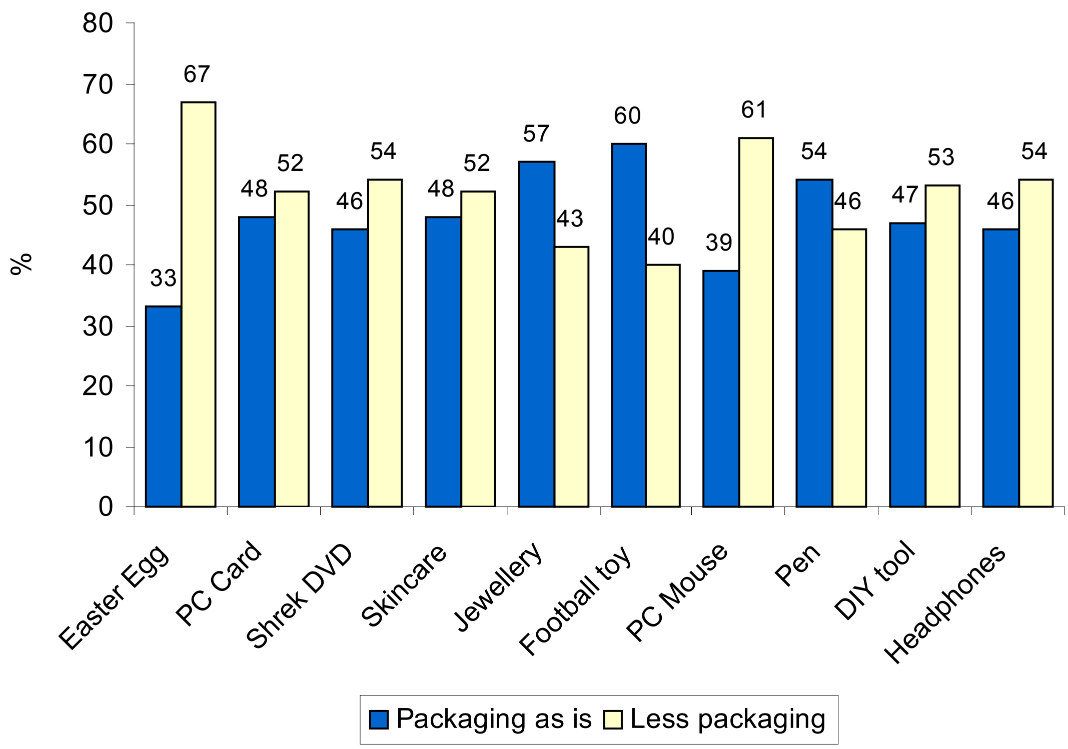
- Similarly, Londoners appear to be more accepting than other regional counterparts of packaging used for products sold at Christmas time. That said, 48% of Londoners still felt products sold at Christmas are often over packaged.

- One in two Londoners find packaging often gives a misleading impression of the amount of the goods inside. Whilst being a strongly supported statement, it is nevertheless agreed by few people (five percentage points) than the national average.

Londoners place less emphasis on packaging when gift purchasing

- When looking at the responses from Londoners, these are broadly comparable to the British population as a whole. The Easter Egg and PC mouse stand out as products were less packaging would be more acceptable, even when these are purchased as a present for someone else.

Figure14 Preferred packaging for presents among Londoners, May 2005



Base: 396 Londoners

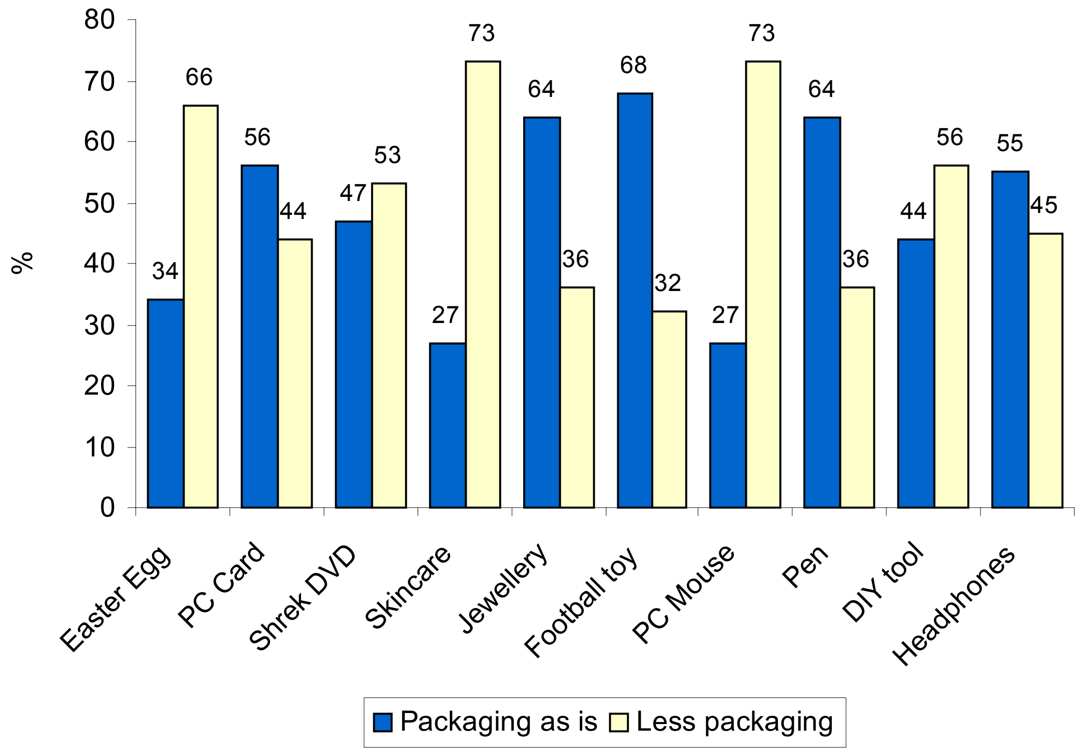
Source: Mintel/NOP

…but Londoners seem to want to 'pamper' themselves

- Londoners showed a greater preference for more modest packaging when buying a present for someone. However, when asked what packaging would be acceptable when buying for themselves, this tendency was not as strong.

Figure 15 Preferred packaging when buying product for personal use among Londoners, May 2005

Base: 396 Londoners



Source: NOP/Mintel

- Comparing the following data in Figure 15 with that in Figure 8 (all respondents), **Londoners tend to be more accepting of products using less packaging than the national average.**

- Key differences in the data, when comparing London and the UK, can be seen with the packaging of the Shrek DVD, Skincare products and the DIY tool. Londoners are more inclined to favour less packaging for these products, while the national average response actually found more packaging most acceptable.

Londoners on a par with attitudes towards packaging reduction

- Generally speaking, trends among Londoners towards this statement mirrors that of the national average, although the lower sample size might be the cause of some smaller irregular response rates.

Figure 16 Agreement with the statement "Manufacturers should be encouraged to reduce the amount of packaging used" among Londoners, by gender, age and socio-economic group, May 2005

Base: 396 Londoners

	Strongly agree %	Agree %	Don't agree %	None of these %	Don't know %
All	61	31	4	1	3
Gender					
men	62	28	3	2	5
women	59	33	6	-	2
Age					
15-19	47	43	4	-	6
20-24	30	51	-	19	-
25-34	62	29	7	-	2
35-44	75	17	3	-	5
45-54	68	22	4	-	5
55-64	63	31	2	-	5
65+	53	40	6	-	1
Socio-economic group					
AB	64	29	1	-	6
C1	66	24	6	2	3
C2	64	31	-	-	5
D	37	50	5	7	-
E	51	35	13	-	1

Source: NOP/Mintel

Appendix 2 – Packaging Preferences for Products Bought as Presents

This section focuses in upon attitudes towards packaging by consumers who purchase products as a present for someone else. This analysis therefore circumnavigates the influence of people purchasing “everyday” products for their spouse or family.

Respondents were asked the following question, and given a show card demonstrating examples of products with two options for packaging (one with existing packaging, ie as it is currently sold, and one with less packaging):

“Thinking about buying one of the following products as A PRESENT FOR SOMEONE, which type of packaging would be the most acceptable to you?”

Over egging Easter packaging?

- Only three of the products demonstrated prompted respondents to voice a preference for less packaging: the Easter egg, PC mouse and headphones. Two-thirds of consumers found less packaging more appropriate for the first two of these products.

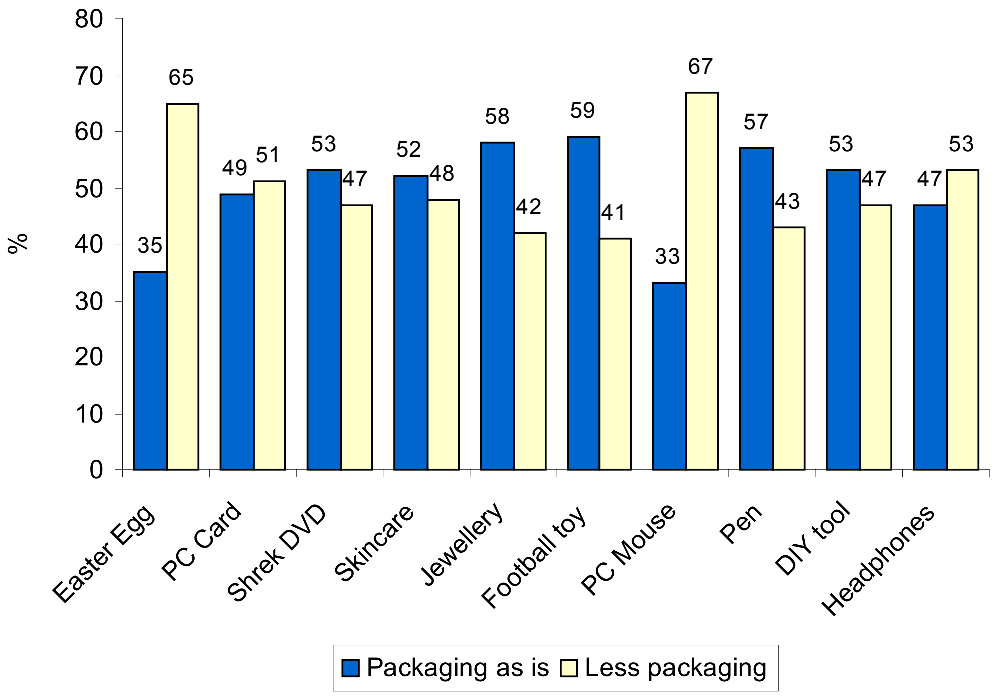
- Three in five consumers felt that the existing packaging of a football toy intended as a gift was acceptable.

- Probably due to its higher price, combined with its suitability as a gift, jewellery stood out as a product where customers were actually more likely to accept the existing packaging (a view supported by 58% of respondents). Likewise, 57% stated a preference for the greater-packaged pen, when buying as a present.

- When purchasing a present, consumers will be more likely to prefer the ‘wow factor’ associated with large amounts of packaging. However, with less glamorous products such as computer peripherals or mice, there was a preference for the less packaged option.

Figure 17 Preferred packaging for presents, May 2005

Base: 1,971 adults



Source: NOP/Mintel

Active British shopper attitudes towards packaging

- To help validate attitudinal data about packaging, Mintel analysed the results from the question posed above, but among only those who had actually purchased the product in question within the past year. The purpose of doing this was to strip out the views of people who are less likely to purchase the actual product in the first place.

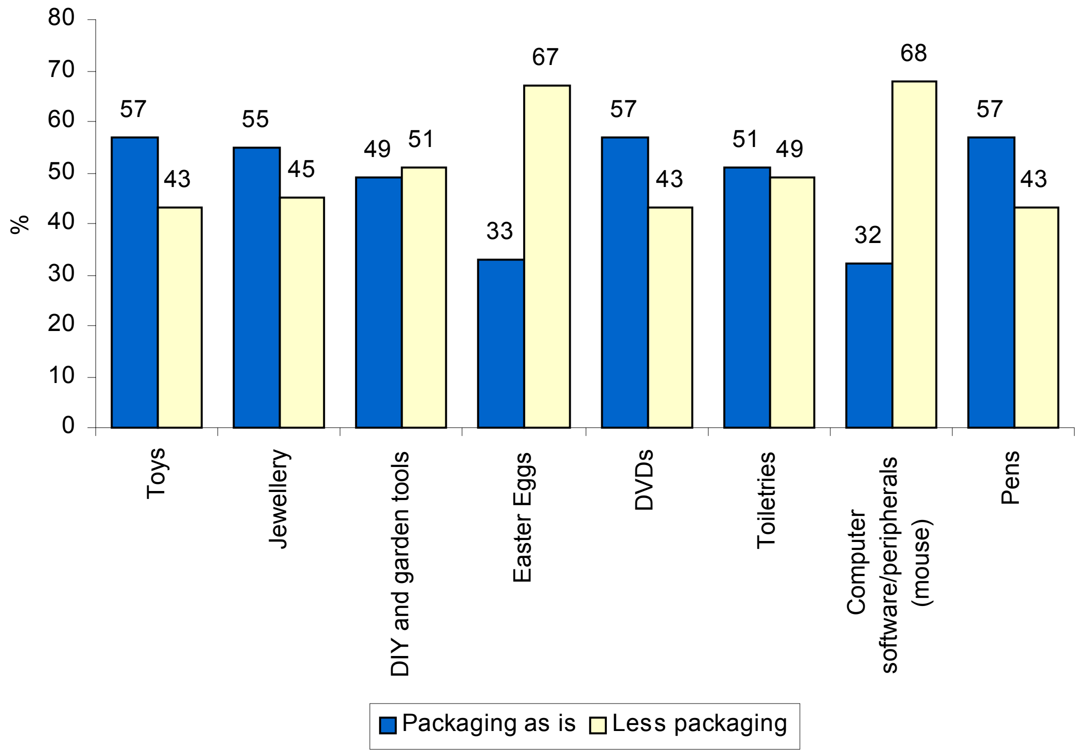
- More than two-thirds of British customers who had purchased an Easter egg or computer peripheral within the last year, felt less packaging was more acceptable.

- In contrast, however, those who had purchased toys, jewellery, DVDs and pens within the last year, supported the view that these products should have more packaging (ie they chose the image with the packaging as it is retailed) if these are to be purchased as a gift for someone else.

- Even if intended as a gift – where one would expect a higher emphasis to be placed upon aesthetics and presentation – there was no clear distinction in views among respondents about the packaging of toiletries and DIY/garden tools.

- The data below does demonstrate that acceptance levels of less packaging are greater among consumers who had actually purchased the products in question within the previous 12 months.

Figure 18 Preferred packaging for presents among those who have bought the product in question in the past year, May 2005



Base: 1,971 adults

Source: NOP/Mintel

Appendix 3 – Packaging Preferences for Products Purchased for Personal Use

The following tables and analyses focus upon the attitudes towards packaging by consumers purchasing products for themselves, as opposed to the previous section which looked at views when purchasing as a gift.

As with the previous question, respondents were given a show card demonstrating examples of products with two options for packaging (one with more packaging and one with less) and asked:

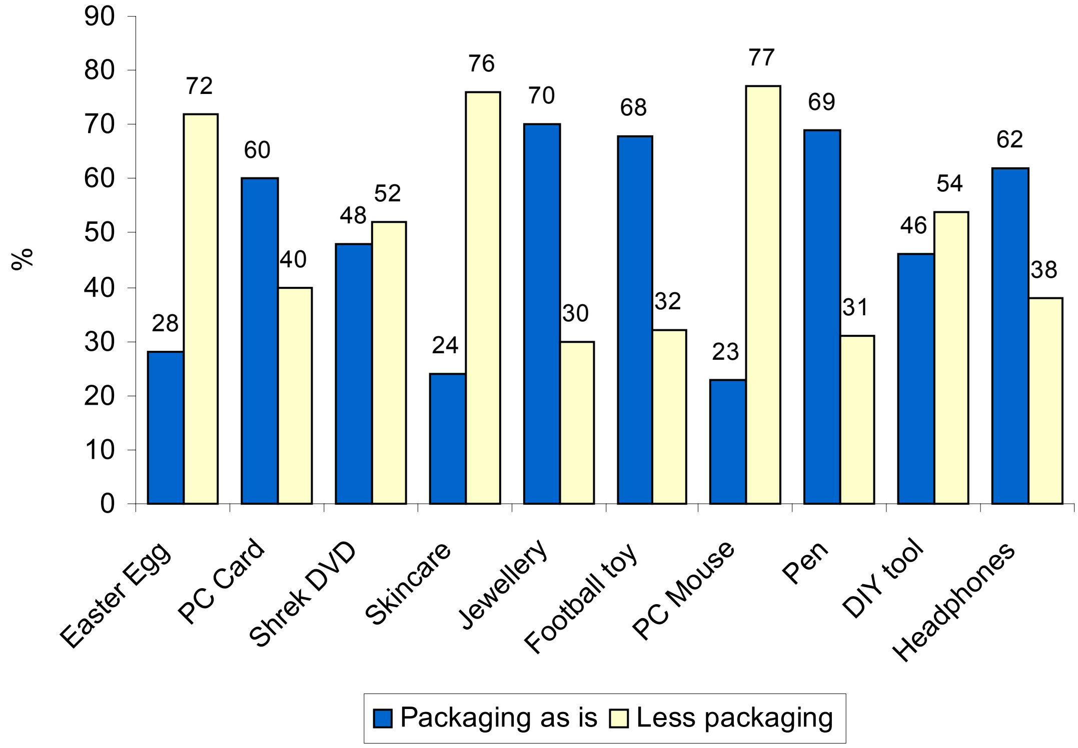
"Thinking about buying one of the following products FOR YOURSELF, which type of packaging would be the most acceptable to you?"

Less packaging more acceptable for those buying for themselves

- Almost three-quarters of British consumers would accept less packing for the Easter egg, skincare product and PC mouse shown.
- With the jewellery, PC card, football toy, pen and headphones, consumers actually indicated a preference for the versions with more packaging. This was true for seven in ten consumers with regards to jewellery, football toy and pen, even when purchasing the product for themselves.
- In comparison to when purchasing as a gift, British consumers are less concerned about packaging when purchasing for themselves and would generally accept less packaging. This is especially true for skincare products; 76% would accept less packaging if purchasing from themselves, compared to 48% when purchasing as a present.

Figure 19 Preferred packaging when buying product for personal use, May 2005

Base: 1,971 adults



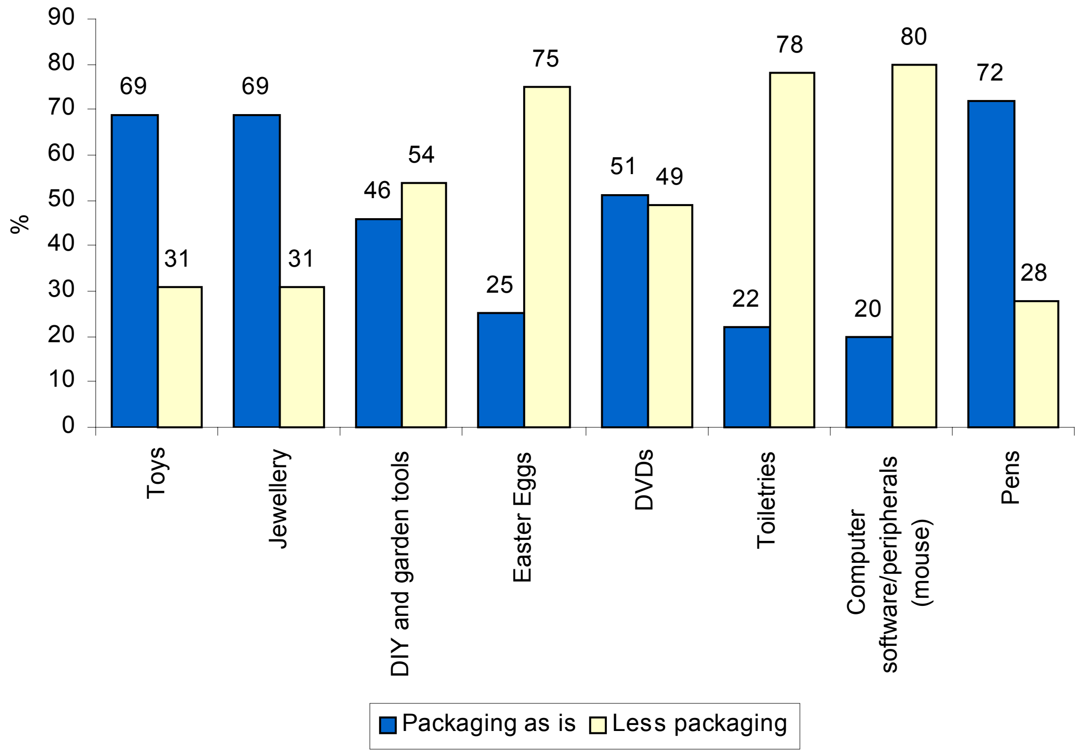
Source: NOP/Mintel

Preferences among those who have recently purchased relevant products

- When those who had recently purchased the product in question are considered, there are a number of notable differences between attitudes to products bought as a present and those bought for the respondents' own use.

Figure 20 Preferred packaging when buying product for personal use among those who had bought the product in question in the last twelve months, May 2005

Base: 1,971 adults



Source: NOP/Mintel

- The most striking difference was the case of toiletries, where some 78% who had purchased in the last year would find the less heavily packaged product most acceptable when buying it for their own use.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Appendix 4 – Types of Purchases Made

This question was included in order to look more specifically at the attitudes of people who have actually bought the types of products for which the packaging has been reviewed.

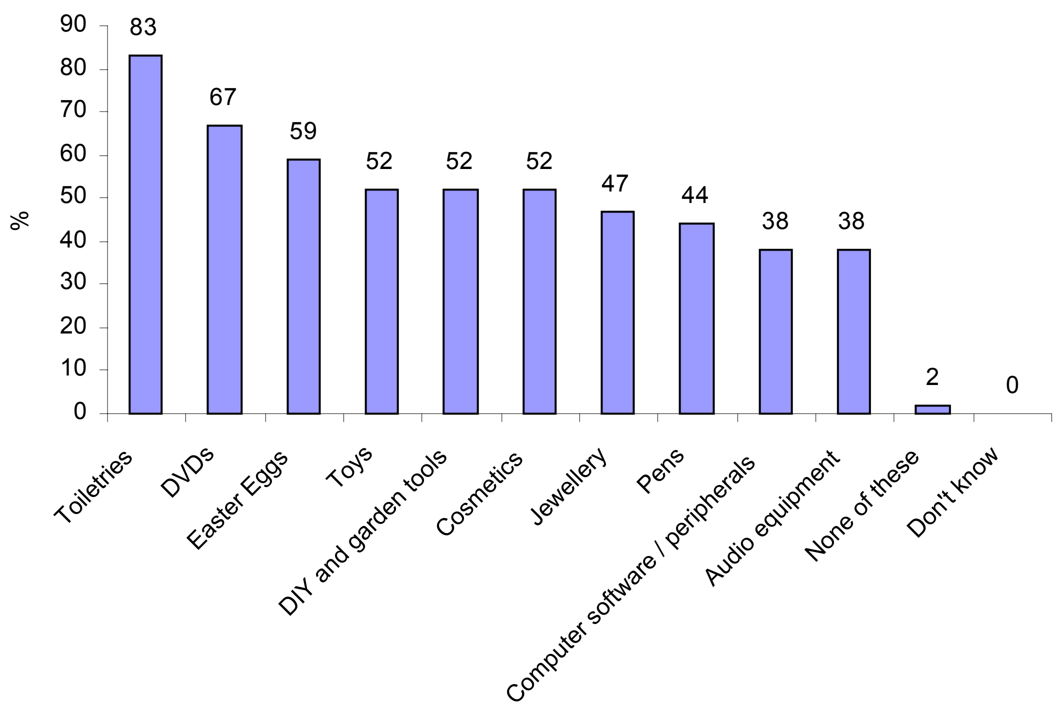
Four in five Brits buy personal care products.

- From the list of items supplied to interviewees, toiletries were the most widely purchased product, with four out of five claiming to have purchased such a product in the 12 months to May 2005. This trend reflects the combination of high rates of use combined with relatively low unit prices. In comparison, cosmetics had only been purchased by one in two people within the last year.

- After toiletries, the next most commonly purchased items were DVDs (67%) and Easter eggs (59%).

Figure 21 Type of purchases made in past year, May 2005

Base: 1,971 adults



Source: NOP/Mintel

- Audio equipment and computer software/peripherals registered the lowest rates of purchase, which is not too surprising given that these products tend to be seen (especially by men) as a male domain, as aspect which is supported by the data below.

- Women more than twice as likely to buy cosmetics than men.

- One would expect gender to dictate purchasing habits, with women, for example, more likely to have purchased toiletries, cosmetics, Easter eggs and toys. However, the extent of gender as a purchasing influence can be quite dramatic. Not even three-quarters of men had bought toiletries within the last year, while 91% of women had done so. The largest disparity by gender occurs with the purchasing of cosmetics, where a 42 percentage point swing can be seen between men and women.

- As previously suggested, the following data supports the greater male influence on purchasing of DVDs, DIY and garden tools, PC software/peripherals and audio equipment.

Figure 22 **Type of purchases made in past year, by gender and socio-economic group, May 2005**

Base: 1,971 adults

	All %	Men %	Women %	AB %	C1 %	C2 %	D %	E %
Toiletries	83	74	91	84	85	84	79	80
DVDs	67	71	64	68	72	69	68	52
Easter Eggs	59	50	68	56	59	65	60	54
Toys	52	44	59	51	56	54	50	44
DIY and garden tools	52	58	47	64	57	56	42	32
Cosmetics	52	30	72	54	56	52	49	46
Jewellery	47	41	54	50	50	49	49	37
Pens	44	41	46	48	47	42	44	36
Computer software and peripherals (accessories)	38	46	30	53	45	33	27	20
Audio equipment - including MP3 players, headphones & accessories	38	45	31	47	43	34	32	25
None of these	2	3	1	3	1	3	1	4
Don't know	-	1	-	-	1	-	-	-

Source: NOP/Mintel

- The social background of consumers has a strong impact upon purchasing habits. Without exception, consumers in lower class bands – especially E's – are less likely to purchase the range of products listed below.

- From the range of products used for research, DIY/garden tools and computer software/peripherals stand out as products, the purchase of which appear to be most influenced by social class, with respective percentage point swings of 32 and 33 between ABs and Es.

Younger respondents lead the way with DVDs

- As might be expected, younger consumers tended to be more likely to have purchased technology-related products – more than four fifths of under 45s had bought a DVD in the last year, and the under-20s were more than half as likely again than the sample as a whole to have purchased an MP3 player.

Figure 23 Type of purchases made in past year, by age, May 2005

Base: 1,971 adults

	All	15-19	20-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%	%	%
Toiletries	83	59	89	89	89	86	77	78
DVDs	67	81	83	83	82	70	58	31
Easter Eggs	59	46	60	67	71	61	54	47
Toys	52	29	58	70	71	47	46	31
DIY and garden tools	52	29	31	57	66	61	57	42
Cosmetics	52	43	63	61	58	51	48	41
Jewellery	47	58	57	53	55	52	47	25
Pens	44	53	59	54	54	44	32	24
Computer software and peripherals (accessories)	38	38	37	53	54	44	28	12
Audio equipment – including MP3 players, headphones & accessories	38	63	41	44	54	39	28	14
None of these	2	1	-	2	1	2	3	5
Don't know	0	2	-	1	-	-	-	-

Source: NOP/Mintel

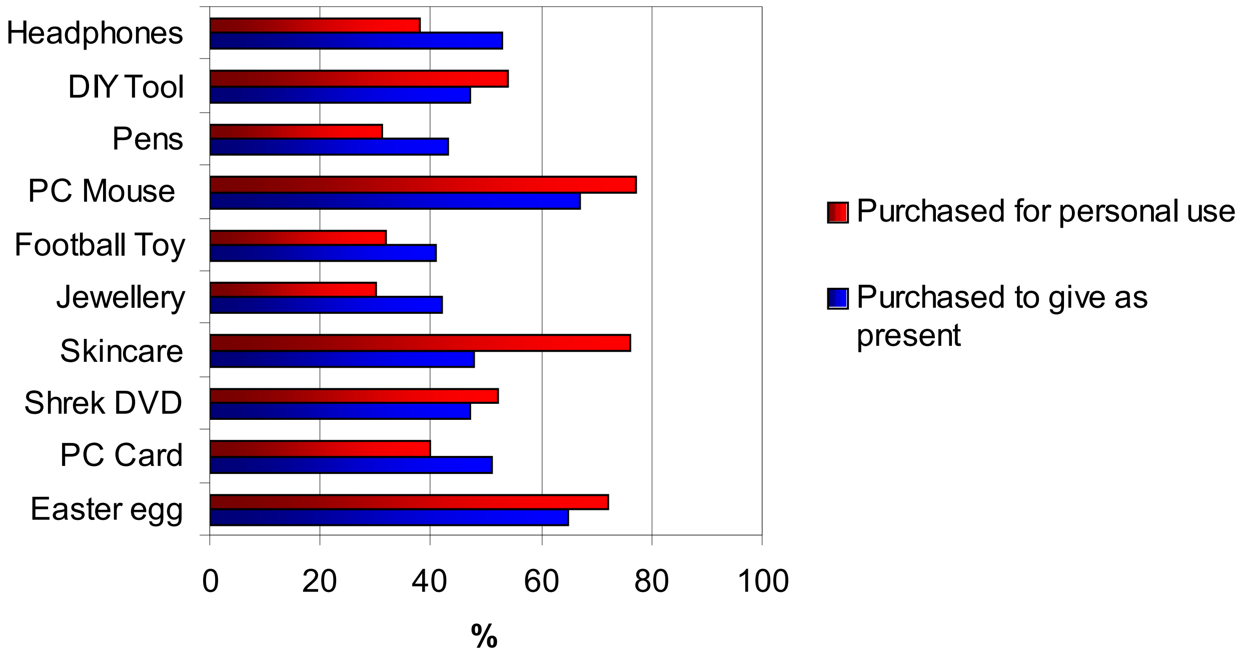
- Both toys and Easter eggs were most likely to have been purchased by the 35-44-year-olds in the sample, reflecting the fact that they are particularly likely to have children. Similarly, middle-aged respondents were most likely to have purchased DIY or gardening tools.

Appendix 5– Complimentary Packaging Acceptance Data (all respondents)

The following tables demonstrate consumer acceptance of less packaging among all respondents, which has been broken down further by gender, social class, age and region.

The main report uses similar analysis, with the exception that the data has been crossed against the question which asks about purchases made within the last year.

Figure 24 Consumer acceptance of less packaging, by product and by reason for purchase, May 2005



Source: Mintel/NOP

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Figure 25 Consumer acceptance of less packaging, by product, reason for purchase, gender and social class, May 2005

		All	Men	Wom-en	AB	C1	C2	D	E
		%	%	%	%	%	%	%	%
Easter egg	Present	65	63	68	71	67	69	60	56
	Self	72	71	74	78	74	73	72	60
PC Card	Present	51	52	50	50	48	53	51	55
	Self	40	44	36	37	42	45	32	39
Shrek DVD	Present	47	45	48	52	47	47	38	48
	Self	52	52	53	58	52	54	47	49
Skincare	Present	48	49	48	54	49	49	44	44
	Self	76	75	78	84	76	78	73	68
Jewellery	Present	42	45	38	39	45	43	39	41
	Self	30	33	28	25	33	31	28	31
Football Toy	Present	41	43	40	38	42	40	41	47
	Self	32	36	28	26	33	33	30	39
PC Mouse	Present	67	66	69	75	68	67	64	61
	Self	77	74	79	81	79	78	72	68
Pens	Present	43	45	42	42	46	42	42	43
	Self	31	34	27	25	31	32	31	33
DIY Tool	Present	47	46	48	49	48	47	45	44
	Self	54	52	55	54	54	56	56	47
Headphones	Present	53	53	53	52	54	54	56	50
	Self	38	39	36	34	38	39	34	41

Source: Mintel/NOP

Figure 26 Consumer acceptance of less packaging, by product, reason for purchase and by age, May 2005

		All	15-19	20-24	25-34	35-44	45-54	55-64	65+
		%	%	%	%	%	%	%	%
Easter egg	Present	65	48	46	64	69	74	75	64
	Self	72	53	66	73	80	76	77	67
PC Card	Present	51	68	59	50	51	44	46	52
	Self	40	57	45	43	36	34	38	39
Shrek DVD	Present	47	16	20	37	49	59	57	59
	Self	52	26	28	46	57	61	61	59
Skincare	Present	48	35	33	50	52	53	48	50
	Self	76	62	66	74	83	82	79	74
Jewellery	Present	42	55	57	53	43	36	33	30
	Self	30	33	43	31	28	26	28	29
Football Toy	Present	41	51	54	44	40	36	38	38
	Self	32	36	41	35	27	27	31	33
PC Mouse	Present	67	47	49	69	68	73	73	72
	Self	77	62	61	78	84	79	80	77
Pens	Present	43	59	47	52	45	38	34	39
	Self	31	41	40	36	27	26	26	28
DIY Tool	Present	47	33	33	44	51	53	53	48
	Self	54	46	40	47	57	60	57	58
Headphones	Present	53	82	63	56	50	47	48	49
	Self	38	49	47	44	28	32	35	40

Source: Mintel/NOP

Figure 27 Consumer acceptance of less packaging, by product, reason for purchase and by TV region, May 2005

		All	Lon-don	South	Anglia/ Mid-ands	Yorkshire /North-east	North-west	Scotland
			%	%	%	%	%	%
Easter egg	Present	65	67	74	67	60	59	65
	Self	72	66	79	74	75	73	68
PC Card	Present	51	52	49	52	51	52	50
	Self	40	44	39	42	37	43	39
Shrek DVD	Present	47	54	44	46	39	49	39
	Self	52	53	53	53	49	59	41
Skincare	Present	48	52	49	49	40	49	43
	Self	76	73	80	79	81	76	67
Jewellery	Present	42	43	39	37	47	44	43
	Self	30	36	25	23	31	39	34
Football Toy	Present	41	40	32	42	45	45	44
	Self	32	32	26	33	28	39	37
PC Mouse	Present	67	61	77	69	67	65	63
	Self	77	73	78	82	84	75	69
Pens	Present	43	46	39	44	47	46	49
	Self	31	36	27	30	29	35	34
DIY Tool	Present	47	53	43	49	46	42	34
	Self	54	56	55	53	53	56	49
Headphone s	Present	53	54	50	50	58	54	59
	Self	38	45	32	40	34	38	41

Source: Mintel/NOP

Figure 28 **Consumer acceptance of less packaging, by product, reason for purchase and by working status, May 2005**

		All	Full-time %	Part-time %	Not working %	retired %
Easter egg	Present	65	68	74	55	65
	Self	72	75	77	67	69
PC Card	Present	51	48	49	57	51
	Self	40	39	38	46	38
Shrek DVD	Present	47	44	51	35	59
	Self	52	52	54	43	61
Skincare	Present	48	50	50	41	51
	Self	76	77	86	69	75
Jewellery	Present	42	48	39	44	32
	Self	30	31	28	33	28
Football Toy	Present	41	41	38	48	39
	Self	32	32	23	36	34
PC Mouse	Present	67	67	71	59	73
	Self	77	78	83	69	77
Pens	Present	43	44	43	49	38
	Self	31	31	27	35	27
DIY Tool	Present	47	47	51	41	50
	Self	54	55	55	45	58
Headphones	Present	53	53	54	59	48
	Self	38	35	36	43	38

Source: Mintel/NOP

Figure 29 Consumer acceptance of less packaging, by product, reason for purchase and by marital status, May 2005

		All	Marr-ied %	Living with partner %	Single %	Widow-ed %	Sepa-rated %	Divor-ced
Easter egg	Present	65	70	61	57	66	71	68
	Self	72	77	75	64	63	74	80
PC Card	Present	51	48	40	58	54	42	56
	Self	40	41	34	44	35	33	34
Shrek DVD	Present	47	53	43	32	58	39	53
	Self	52	58	53	38	57	45	60
Skincare	Present	48	50	45	44	52	49	49
	Self	76	81	81	67	69	83	85
Jewellery	Present	42	36	50	52	35	45	38
	Self	30	28	28	37	27	31	27
Football Toy	Present	41	41	38	47	36	43	37
	Self	32	32	30	34	30	35	26
PC Mouse	Present	67	71	70	56	70	70	81
	Self	77	81	76	66	76	78	86
Pens	Present	43	43	43	49	38	37	37
	Self	31	28	38	35	27	31	24
DIY Tool	Present	47	50	50	40	49	39	52
	Self	54	57	53	46	52	63	58
Headphones	Present	53	50	54	62	48	49	49
	Self	38	35	36	44	39	36	34

Source: Mintel/NOP

Appendix 6 – Research Methodology

This research was undertaken using a national omnibus (NOP). The nationally representative sample comprised 2,000 respondents aged over 15 years.

The actual fieldwork was conducted door-to-door, using CAPI technology, which enabled visuals of packaging to be shown to respondents, from which we gauged which forms of packaging are acceptable to consumers. The use of a 2,000 sample, enabled fuller regional analysis to be collected, and therefore allowed for comparisons between London and the country as a whole.

The questionnaire (5 questions) and the visual stimulus were compiled in close conjunction with LoTSA, to ensure that the issue of 'consumer acceptance' is correctly addressed. The showcard for questions 3 and 4 demonstrated sample products selected by LoTSA with two versions of packaging: the first image showed the existing packaging (ie as sold) and the second showed the same product with a mocked up version using less packaging.

Question 1 **WHICH, IF ANY OF THE FOLLOWING STATEMENTS ABOUT PACKAGING DO YOU AGREE WITH? (SHOWCARD)**

- I would like to see a reduced amount of packaging on food products bought from a supermarket
- I would like to see a reduced amount of packaging on non foods products bought from a supermarket.
- Products sold at Christmas are often over packaged.
- Packaging often gives a misleading impression of the amount of the goods inside
- I like to buy day to day products which are attractively packaged
- I would like the amount of packaging on products I buy to be reduced if it lead to lower prices
- Products sold at Christmas for people to give as presents are often over packaged.
- None of these.
- Don't know.

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com

Question 2	**Which of the following types of products have you bought in the past year? (SHOWCARD)**

- Toys
- Jewellery
- DIY and garden tools
- Easter eggs
- DVDs
- Cosmetics
- Toiletries
- Computer software & peripherals (accessories)
- Pens
- Audio equipment – including MP3 players, headphones & accesories

Question 3 **"Thinking about buying one of the following products as A PRESENT FOR SOMEONE, which type of packaging would be the most acceptable to you?"**
(SHOWCARD: RESPONDENT SELECTED ONE OF TWO IMAGES REFLECTING LEVELS OF PACKAGING ACCEPTANCE LEVELS)

• Product 1	A	B
• Product 2	A	B
• Product 3	A	B
• Product 4	A	B
• Product 5	A	B
• Product 6	A	B
• Product 7	A	B
• Product 8	A	B
• Product 9	A	B

Question 4 **"Thinking about buying one of the following products FOR YOURSELF, which type of packaging would be the most acceptable to you?"**
(SHOWCARD: RESPONDENT SELECTED ONE OF TWO IMAGES REFLECTING LEVELS OF PACKAGING ACCEPTANCE LEVELS)

• Product 1	A	B
• Product 2	A	B
• Product 3	A	B
• Product 4	A	B
• Product 5	A	B
• Product 6	A	B
• Product 7	A	B
• Product 8	A	B
• Product 9	A	B

Question 5 **"A number of organisations are keen to encourage manufacturers and retailers to reduce the amount of packaging they use for a wide range of products. However, they need to understand whether this move would be supported by the general public. Which of these statements best matches what you believe about this issue?"**

1. I **strongly believe** that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street

2. I **believe** that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street

3. I **don't believe** that manufacturers should be encouraged to reduce the amount of packaging used for a wide range of goods sold in supermarkets and on the high street

4. None of these answers

For further information, please contact Helen Osman on +44 (0) 20 7606 4533 or email hosman@mintel.com