Consumer attitudes to food waste and food packaging: Summary of research findings (March 2013)

In partnership with:
Presentation outline

■ Background
■ Summary of key findings
■ Summary of opportunities
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■ Methodology
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■ Need more?
Consumer attitudes to food waste and food packaging: Background
Why is this important? (1)

- ca. 60% of household food waste is from products ‘not used in time’, worth around £6.7 billion a year
- Most is from perishable / short shelf life products
  - Incl. 17 billion ‘5-a-day’ portions of fresh produce (more than a fifth of purchases) bought but not eaten
- Previous research suggested that behaviours around packaging in home could be contributing to this
  - removing food from packaging after purchase but before storage (when the packaging is designed to keep the food fresher for longer)
  - not making use of packaging functionality (such as reclosing packs to prevent dehydration in the fridge)
  - not looking at or following guidance on pack (when to consume by, how to store, whether the product can be frozen)
In addition, previous research, and feedback from engagement with consumers, suggested that attitudes towards packaging might be a barrier to further reducing the amount of food thrown away.

However, there was a lack of robust evidence in this area to inform a strategy partners could implement to help address consumer concerns, and enable them to take steps to prevent food going to waste.

The insights from this new piece of research will help in the development of more effective messages and products that will enable consumers to get more from the food they buy, and make savings through wasting less.
The research was commissioned by a Steering Group comprising representatives from:
- INCPEN (Industry Council for Packaging & the Environment)
- WRAP
- The Packaging Federation
- The Food & Drink Federation
- Kent Waste Partnership
- The British Retail Consortium

WRAP co-funded the research, and had sign off on the research methodology and report.

The research was undertaken by Icaro Consulting, between April and August 2012.
What is different about this research?

- Although much research has been carried out on food waste and food packaging, this new research has added significantly to our understanding, and our ability to help develop and deliver solutions to help consumers:
  - For the first time attitudes to food and packaging have been explored together in a broad range of contexts
  - The research has also revealed which factors around packaging are considered most helpful (in avoiding food waste) and also what consumers are aware of (which is new)
  - The large sample size in this study provides much more detail on different socio-demographics groups. This will help organisations develop more effective solutions for a wider range of consumers
  - The assessment of responses to different statements and messages around food waste and food packaging, via a methodology not used previously in this area will inform the development of more effective communications
Consumer attitudes to food waste and food packaging: Summary of key findings
Overall summary

- Throwing away food “not used in time” is costing consumers £6.7 billion a year (£270 for the average household)
- How long food stays fresh for is a priority for consumers
- Many are not making best use of the information on pack, or the packaging itself to achieve this
- Clear and consistent labelling (e.g. date labels, storage and freezing guidance), improved packaging functionality (e.g. re-closability, materials to enhance life) and communicating the benefits of using this will all make a difference
- Small changes in behaviour around packaging could deliver the benefits consumers are looking for – keeping food fresher for longer, saving money and reducing the impact of food on the environment
Key findings (headlines 1)

- How long food lasts for, freshness and quality are priorities for consumers (in addition to price)
- Many consumers do not recognise that packaging protects food in the home
- Consumer confidence around storing food is high, but can be misplaced
- The information on labels, and how they are used, could both be more effective. There is demand for better on-pack guidance about storage and the majority of consumers say that they would use this
- Re-closable packs, packaging that makes the product last longer and split packs are rated as being most useful, but a gap exists in awareness of what products are available
Key findings (headlines 2)

- In the wider context of food issues, only a small minority identify packaging as one of their top concerns.
- When prompted, consumers are concerned about the environmental impact of packaging, but this is matched by concerns about the impact of food waste.
- Concern about food waste increases in response to more information, whilst concern about packaging reduces.
- Concern about packaging does not appear to be compromising action on food waste reduction.
- There is recognition that food retailers and manufacturers have made progress to reduce the amount of packaging.
- Being able to recycle packaging is important to consumers, and influences attitudes towards packaging.
Consumer attitudes to food waste and food packaging: Summary of opportunities
Opportunities to help reduce food waste (1)

- As consumers we can all make more use of the information provided on packaging, particularly as much of this is being updated, and the packaging itself, to ensure that the way we store food at home keeps it fresher for longer.

- Local authorities, consumer groups and others can provide advice on buying food with the appropriate packaging (e.g. loose or packaged if you want to keep it fresher for longer), buying the right pack size and looking more closely at labels.

- Love Food Hate Waste is doing more to raise awareness of the benefits of reducing food waste, and the role that packaging can play in that. Further information about how to get involved can be found at our partners’ website.
Opportunities to help reduce food waste (2)

- Food and packaging organisations (retailers, manufacturers, trade associations) should consider whether they, or their members, can do more to innovate their packaging or inform consumers about the innovations they are already making to raise awareness of the benefits and encourage consumers to make use of these.

- Continued innovation in packaging recyclability along with increased provision of recycling services, and clear communication on how to use them, has the potential to reduce concerns around packaging, helping consumers deal with packaging at the end of its life.
Consumer attitudes to food waste and food packaging: Examples of action
Examples of action from the food industry

- Many more packs are now reclosable (e.g. cheese)
- There are a range of types of packs to suit different needs, (e.g. smaller packs of bread, ‘fridge packs’ for baked beans, ‘split packs’ so that you can use some now and some later)
- Innovations to keep food fresher for longer, which means there is more time to eat the food whilst it is still at its best
- Less confusing and more helpful labels:
  - Retailers and brands are removing ‘display until’ dates so that the ‘best before’ and most importantly ‘use by’ dates are easier to see
  - More products have moved to a ‘best before’ date from a ‘use by’ date, giving the flexibility to use the product after the date
  - Most food packs have detailed storage advice, many are highlighting on the front of pack where to store food to keep it at its best
  - Retailers and brands are moving away from ‘freeze on day of purchase’ to ‘freeze before the date’, giving more time to freeze food
Examples of action

Freeze-by dates relaxed to cut waste of unused food

STORAGE

For Use By, Keep refrigerated 0°C to +5°C.

Freeze by date mark shown.
Consumer attitudes to food waste and food packaging: More detail on how the research was done, and the findings
Consumer attitudes to food waste and food packaging: Methodology
Methodology

- Qualitative and quantitative methods were employed, comprising
  - a review of previous surveys on food waste and packaging
  - 18 accompanied food-shops and follow up in home depth interviews
  - an online survey of 4,000 UK consumers (the largest to date on this subject)
    Quotas were set on age, gender, work status and geographic region to ensure that the sample was representative of the UK population

- WRAP co-funded the research, and had sign off on the research methodology and report

- The research was undertaken by Icaro Consulting, between April and August 2012
Consumer attitudes to food waste and food packaging: Research findings
Insights

- What is important to consumers?
  - Context is key

- Are concerns about packaging getting in the way of tackling food waste?

- How do messages about food waste and packaging influence attitudes?
What food issues concern consumers?

- The price of food: 64%
- How long fresh food lasts for: 48%
- The amount of fat in food: 41%
- The amount of salt in food: 34%
- Food waste: 33%
  - The use of additives (such as preservatives and colouring): 30%
  - The welfare of animals: 29%
  - The amount of sugar in food: 28%
  - Food poisoning such as Salmonella and E.Coli: 26%
  - Genetically Modified (GM) foods: 20%
  - Food labelling (e.g. ‘use by’ date; storage instructions): 20%
  - The use of pesticides to grow food: 18%
- The way that food products are packaged: 16%
- Food miles (e.g. the distance food travels to get to the shop): 15%
- None of these: 2%

Average number of mentions = 4.25
Factors influencing choice in store

Answers mentioned unprompted only

- The price: 40 unprompted, 74 prompted
- Freshness: 37 unprompted, 55 prompted
- Use by date: 18 unprompted, 55 prompted
- Quality: 14 unprompted, 13 prompted
- Look of product: 14 unprompted, 53 prompted
- Special offers: 10 unprompted, 59 prompted
- Country of origin: 5 unprompted, 18 prompted
- The brand: 4 unprompted, 23 prompted
- Portions/pack size: 4 unprompted, 52 prompted
- Value for money: 3 unprompted, 69 prompted
- How it's packaged: 2 unprompted, 17 prompted
- Choose by habit: 1 unprompted, 2 prompted
- Labelling info: <1 unprompted, 11 prompted
In an environmental context....

Packaging is a major environmental problem

- Strongly agree: 30
- Tend to agree: 51
- Neither agree nor disagree: 16
- Tend to disagree: 2

Packaging is not a major environmental problem

- Strongly agree: 4
- Tend to agree: 9
- Neither agree nor disagree: 14
- Tend to disagree: 36
- Strongly disagree: 34

% giving that answer
In an environmental context….

- Packaging is a bigger environmental problem than food waste: 19% strongly agree, 31% tend to agree, 37% think they're both about the same, 8% tend to disagree, 2% strongly disagree.

- Food waste is a bigger environmental problem than packaging: 16% strongly agree, 28% tend to agree, 42% think they're both about the same, 8% tend to disagree, 2% strongly disagree.
Needs and attitudes depend on context

- How long food lasts for, freshness and quality are priorities for consumers (in addition to price)
- In a shopping context, packaging is a low priority, but plays a supporting and practical role in product choice
- When prompted, consumers are concerned about the environmental impact of packaging, but this is matched by concerns about the impact of food waste
- Concern about packaging does not appear to be compromising action on food waste reduction
- Those most concerned about packaging are indeed also those most concerned about food waste
Positive messages about packaging reduces concern

- A - The vast majority of packaging can be recycled (85%) so the overall impact on the environment is less than you might think
- B - Without packaging many of the food products that we enjoy would only be available for a few months of the year – rather than all year round as they are now
- C - Packaging allows food to stay fresher for much longer – not just on the shelves but in your home as well
- D - Guardian article on Tesco trialling new food waste reducing packaging
- E - On average, packaging weighs 10 times less than the product it protects
But attitudes are subject to change

A - We throw away 4 million tonnes of packaging waste a year in the UK.

B - Packaging adds £470 onto the average consumer’s food shopping bill each year.

C - Telegraph article on supermarkets “using too much packaging”

D - Packaging allows food to stay fresher for much longer – not just on the shelves but in your home as well.

E - If we didn’t have packaging, we would have to throw away a great deal more food than the comparatively small amount of packaging waste we currently produce.

F - Guardian article on Tesco trialling new food waste reducing packaging
Concerns about food waste increase with more information

A - The impact on the environment of growing, manufacturing, transporting and storing food that ends up being wasted in the UK each year is the same as 9 million cars (a fifth of all those on UK roads)

B - In the UK we throw away enough food, from our homes, to fill Wembley Stadium to the brim nine times over – every year

C - The world population is rising quickly; faster than we can increase food production. Prices will go up and we may not be able to buy all of the food we need. We need to be less wasteful with the food we DO have

D - The food we throw away from our homes is more than all of that thrown away by food manufacturers, retailers and restaurants combined. We’ve reduced this by over 10% in 3 years but there is still a lot more to do
Concerns about food waste increase with more information

A - Food waste gives off harmful gases like methane when it rots in landfill. Methane is 20x worse for the atmosphere than Carbon Dioxide

B - The impact on the environment of food waste is many times greater than the packaging it comes in (6 times greater for apples, 30 times greater for tomatoes and 100 times greater for lettuce)

C - Wasting food costs the average household around £480 a year. For families with children, the cost can be up to £680 a year

D - The amount of water used to grow and manufacture the food we throw away in the UK, each year would fill more than 2 million Olympic swimming pools, and much of this water is in food from countries that have water shortages
Food waste vs packaging

- Concern about packaging does not appear to be compromising action on food waste reduction
- Unlike previous surveys, that suggested packaging may be a far more pressing issue for consumers than food waste, this research finds that, when prompted, they consider both issues to be ‘equally problematic’ and do not have a fixed opinion as to which is ‘worse’
- However, consumers appear comfortable holding both views at the same time, and those most concerned about packaging are indeed also those most concerned about food waste
- Concern about food waste increases in response to more information, whilst concern about packaging reduces in response to more information
Insights

- How food packaging is perceived and used
### The perceived benefits of packaging

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeps products safe and hygienic</td>
<td>42%</td>
</tr>
<tr>
<td>Gives important information on labels (e.g. ingredients, storage guidance)</td>
<td>37%</td>
</tr>
<tr>
<td>Protects the food (from factory to the shop and on the way home)</td>
<td>36%</td>
</tr>
<tr>
<td>Helps keep the product fresh / at its best quality</td>
<td>33%</td>
</tr>
<tr>
<td>Makes it easy / convenient to transport home</td>
<td>26%</td>
</tr>
<tr>
<td>Makes it easy to store at home</td>
<td>14%</td>
</tr>
<tr>
<td>Allows seasonal food to be purchased all year in the UK</td>
<td>13%</td>
</tr>
<tr>
<td>Protects the food (in the home)</td>
<td>13%</td>
</tr>
<tr>
<td>I don’t think packaging offers any benefits to the consumer</td>
<td>10%</td>
</tr>
<tr>
<td>Supports the economy by reducing waste, keeping costs down and providing jobs</td>
<td>9%</td>
</tr>
<tr>
<td>Makes it easy to use at home</td>
<td>8%</td>
</tr>
</tbody>
</table>
Beliefs about packaging

- **Strongly agree**
- **Tend to agree**
- **Neither agree nor disagree**
- **Tend to disagree**
- **Strongly disagree**

Storing food at home in its original packaging keeps it fresher for longer

5 | 21 | 42 | 21 | 6

Younger people, are far more inclined to agree with this statement (41% of 18-34’s as opposed to just 16% of 55-74’s)
Beliefs about packaging

Keeping fresh fruit and vegetables in their original packaging makes them ‘sweat’ and go off quicker
Behaviour around packaging

<table>
<thead>
<tr>
<th></th>
<th>Apples</th>
<th>Bananas</th>
<th>Carrots</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store at home in original packaging</td>
<td>19%</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>Take out and use alternative wrapping</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Store in original packaging but ‘do’ something to it</td>
<td>6%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Take out of original packaging and store loose</td>
<td>58%</td>
<td>63%</td>
<td>34%</td>
</tr>
</tbody>
</table>
Overall, how confident are you that the way in which you store your fresh fruit and vegetables is the best way to ensure that they stay fresh for as long as possible?
Use of storage guidance

I only look at labels if it’s a product I don’t normally buy or have never bought before 47%

I very often look at the instructions on the label about how best to store the product 22%

I don’t need to look at labels because I know how to store things already 21%

It doesn’t occur to me to look at storage instructions on pack labels 14%

I don’t look at labels because the font is too small 5%

I don’t look at labels because I’ve got more important things to do 4%

I don’t look at labels because they don’t provide useful advice 3%

I don’t look at labels because they aren’t easy to understand 2%
Do you have any tips for storing or improving shelf-life of fruit/veg? (WRAP, 2008)

<table>
<thead>
<tr>
<th>Tip</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove packaging before storage</td>
<td>23%</td>
</tr>
<tr>
<td>Use a special container (airtight, paper bags...)</td>
<td>16%</td>
</tr>
<tr>
<td>Keep bananas away from other fruits</td>
<td>15%</td>
</tr>
<tr>
<td>Keep fruits and vegetables in a cool/dark place</td>
<td>15%</td>
</tr>
<tr>
<td>Keep fruits and vegetables in the fridge</td>
<td>13%</td>
</tr>
<tr>
<td>Buy only what you need</td>
<td>6%</td>
</tr>
<tr>
<td>Do not refrigerate bananas</td>
<td>4%</td>
</tr>
</tbody>
</table>

Storage and freezing (WRAP, 2007-2012)

- 24% store apples in the fridge (advice = keep refrigerated)
- 70% store carrots in the fridge (advice = keep refrigerated)
- 11% store bread in the fridge (advice = do not refrigerate)
- 13% do not re-close packs of sliced meats after opening (advice = re-close to prevent drying out)
- 59% believe pre-packed food should be frozen on the day of purchase (advice is now ‘freeze before the date’)

Related WRAP research
Those recognising the benefits of packaging have a more positive view.

- Recognise packaging keep products fresh at home (445):
  - Positive: 2.48
  - Negative: 0.52
- Does not recognise that packaging keeps products fresh (1611):
  - Positive: 1.04
  - Negative: 1.96

- Age groups with their respective sample sizes:
  - 18-24 (242):
    - Positive: 1.71
    - Negative: 1.29
  - 25-34 (351):
    - Positive: 1.85
    - Negative: 1.15
  - 35-44 (352):
    - Positive: 1.38
    - Negative: 1.62
  - 45-54 (380):
    - Positive: 1.21
    - Negative: 1.79
  - 55+ (731):
    - Positive: 1.08
    - Negative: 1.92
How food packaging is perceived and used

- There is recognition that packaging is important to keep food safe on its way to, and in, the store, but less recognition that it plays a role at home.
- In fact, the prevailing view is the opposite, i.e. that keeping food in packaging leads it to spoil more quickly.
- This in turn leads many consumers to take food out of its packaging, which potentially decreases how long it lasts.
- The majority of consumers are confident in their way of storing food, and do not make use of guidance on pack.
- Among the minority of consumers who do recognise that packaging can keep products fresher for longer, attitudes to packaging are significantly less negative.
Insights

- Recognition of, and demand for, packaging innovations
What would consumers find most useful?

- Re-sealable / re-closable: 56%
- Package makes product last longer / keeps fresher: 40%
- Recyclable – i.e. can be recycled: 40%
- "Split packs": 32%
- Re-fillable / re-usable: 30%
- Easier to open: 25%
- Compostable / biodegradable: 20%
- Easier to store: 20%
- Recycled – i.e. made of recycled materials: 19%
- Smaller pack sizes: 19%
- Clearer storage information on the label: 16%
- Monitors and gives information about the freshness: 15%
- Lighter-weight packaging: 14%

% of people mentioning in their top 4
What would be most useful vs what has been noticed

- Re-sealable / re-closable
- Pkg makes product last longer / keeps fresher
- Recyclable – i.e. can be recycled
- "Split packs"
- Re-fillable / re-usable
- Easier to open
- Easier to store
- Compostable / biodegradable
- Smaller pack sizes
- Recycled – i.e. made of recycled materials
- Clearer storage information on the label
- Monitors and gives information about the freshness
- Lighter-weight packaging

Most useful
- Seen lots of packs like this
How likely are consumers to use clearer labels?

If there was clearer and more prominent information on the label about how to store the product in the most effective way/keep the item fresh for as long as possible, how likely would you be to use that information when you came to store food at home?

- Very likely: 37%
- Fairly likely: 47%
- Not very likely: 10%
- Not at all likely: 2%
Likely use of labels – some examples

A - Keeps fresher for longer in the fridge

B - Keep me cold

C - Suitable for home freezing

D - Freeze in suitable container

% giving that answer
Packaging innovation

- Re-closable packs, packaging that makes the product last longer and split packs are three of the innovations that consumers rated as being most useful to them.

- There is a noticeable gap between the amount of consumers who have seen particular packaging innovations and the number who say they would be a good idea.

- Re-closable packs are highlighted as being relatively prevalent in shops, but far fewer people have noticed ‘a lot’ of packaging that keeps food fresher or split packs.

- There is demand for better on-pack guidance about storage and the majority of consumers say that they would use this.
Insights

■ What about end of life packaging?
Concern about packaging and perceived ease of recycling

- **Plastic wrappers and film (3196 & 906)**
- **Plastic pots, tubs and trays (2306 & 1796)**
- **Plastic bottles (1104 & 2998)**
- **Multi material packaging (3064 & 1038)**
- **Foil / foil paper (2754 & 1348)**
- **Cartons e.g. milk, juice (1911 & 2191)**
- **Cans and tins (817 & 3285)**
- **Glass bottles and jars (961 & 3241)**
- **Paper/cardboard (573 & 3529)**
What would be most useful vs what has been noticed
Packaging reduction - recognition of progress

90% say at least “a little”
46% a “fair amount” or more
Packaging recycling and reduction

- There is a strong correlation between concerns about packaging materials and how easy it is to recycle them.
- When asked what changes in packaging consumers would find most useful, ‘recyclable – i.e. can be recycled’ was the second highest.
- Levels of awareness of recyclable packaging was also high.
- There is recognition of progress in recent years to reduce the amount of packaging (90% say at least “a little”; 46% a “fair amount” or more).
- Even those who consider packaging to be a major environmental problem acknowledge progress.
Overall summary

- Throwing away food “not used in time” is costing consumers £6.7 billion a year (£270 for the average household)
- How long food stays fresh for is a priority for consumers
- Many are not making best use of the information on pack, or the packaging itself to achieve this
- Clear and consistent labelling (e.g. date labels, storage and freezing guidance), improved packaging functionality (e.g. re-closability, materials to enhance life) and communicating the benefits of using this will all make a difference
- Small changes in behaviour around packaging could deliver the benefits consumers are looking for – keeping food fresher for longer, saving money and reducing the impact of food on the environment
Consumer insights around packaging to prevent food waste:
More information and materials are available
Need more?

- Full report, separate executive summary and short “Guide for Partners” can be found at: www.wrap.org.uk/fresherforlonger

- A wide range of communications materials can be downloaded from the Love Food Hate Waste partners site, free of charge www.lovefoodhatewaste.com/partners

- For further details on the research contact:
  – andrew.parry@wrap.org.uk