Key Findings Report

INCPEN & WRAP: UK survey 2019 on citizens’ attitudes & behaviours relating to food waste, packaging and plastic packaging

Main Supporting Partners

Supporting Partners

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Our mission is to accelerate the move to a sustainable resource-efficient economy through re-inventing how we design, produce and sell products; re-thinking how we use and consume products; and re-defining what is possible through re-use and recycling.

Find out more at www.wrap.org.uk

INCPEN’s vision is a global human society that functions in harmony with the planet’s natural resources. We value the functional properties of packaging that help to prevent environmental harms, whilst working hard to ensure packaging items themselves have sustainable lives in line with circular economy principles.

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Prepared by INCPEN and WRAP

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Introduction

This report outlines the key findings from a comprehensive piece of research undertaken with UK consumers. The purpose of the research is to authoritatively assess citizens’ views in relation to food waste and food packaging and compare this to the previous survey undertaken in 2012. The results will inform national programmes and policy including:

- Courtauld 2025 including the value & roles of packaging in reducing food waste;
- UK Plastics Pact;
- Current policy issues where it is important for the UK, Scottish and Welsh governments to have informed, evidence-based views from consumers.

Methodology

Fieldwork was conducted online in November-December 2018. 6,214 interviews were completed: in England (3,000); Wales (996); Scotland (998); Northern Ireland (206); London (1,180) and Kent (221). To achieve the overall UK sample, the data from each of the four nations were combined according to their share of the UK population – giving an ‘effective UK base’ of 5,175.

The sample is based on those with at least some degree of responsibility in the home for food shopping and/or preparation. Quotas were set for region, social grade, age and gender. The targets were largely met, with minor weighting applied to ensure a representative sample profile.

Sub-group analyses have been undertaken to assess the impact of socio-demographic factors such as age, gender, social economic grade, the presence of children in the household, etc. Analyses are also presented according to WRAP’s food waste and recycling segmentation models (see Appendix 1 for more details).

Survey design

The questionnaire was designed to explore food packaging from a number of perspectives and in the most neutral, unbiased way possible. For example:

- Early questions set the issues of food waste and/or food packaging in a wider context amongst other issues (i.e. to allow these issues to emerge only if consumers consider them important relative to other food issues).
- In order to understand ‘top of mind’ responses, a series of open-ended questions were asked that involved no prompts or direction in terms of possible answer options
- Question scales were randomised or reversed to guard against any subtle sequencing or acquiescence bias.

The survey also used, at various points, a form of ‘split sampling’ whereby half the respondents saw the question framed in the language of ‘plastic packaging for food’ (i.e. a specific construct focused on plastic packaging) whereas the other half saw the question framed as ‘food packaging’ (i.e. a more general construct which includes plastic as well as other packaging materials). The intention of this variation was to test whether specific mention of ‘plastic’ had a material impact on responses.

1 Insert formal reference here
2 The effective sample size is a measure of the precision of the survey once the effect of weighting is considered, i.e. although 6,214 interviews were undertaken, this is the equivalent of an un-weighted sample of 5,175. The statistical tests are based on this effective sample size.
Statistical significance

Statistical tests have been performed to assess whether an apparent difference in the survey data (i.e. across years or between sub-groups) is statistically significant or not. This is because a sample of consumers has completed the survey, not the entire population (i.e. a census).

The tests have been undertaken to the 99% confidence level (i.e. 99 times out of 100 the observed difference will be real vs. 1 time out of 100 it will have happened by chance). On graphs and tables, statistically significant results are clearly flagged; if they are not then any observed differences are not significant.

Statistical tests are based around margins of error. For the UK sample as a whole, the maximum margin of error in the results is ±2% (i.e. if the survey gives a result of 50% then the real result, if all households in the country were interviewed, would be somewhere in the range 48% - 52%).
1. Key Findings

1.1 Concerns about food

The research demonstrates that food waste and the way food is packaged have both increased in prominence as concerns that UK consumers have about food. When asked to select up to five food issues that most concern them (Figure 1), 40% choose food waste (ranking 2nd), compared to 33% in 2012. Likewise, just over one in four (28%) choose the way that food products are packaged (ranking 7th), compared to 16% in 2012 when it was notably a low-ranking issue.

By contrast, how long fresh food lasts for remains a key issue but nonetheless one that concerns fewer consumers than before. Almost one in three (32%) are concerned about this issue (ranking 4th), compared to almost half (48%) in 2012 (when it ranked 2nd, behind only the price of food).

Some groups of consumers are more likely to identify food packaging as a concern – notably Guardian/Observer readers (36%); regional newspaper readers (35%); residents in Kent (32%); M&S and Waitrose shoppers (both 32%); those in the South West (31%) and those aged 55+ (31%). There is also a high correlation with WRAP’s segmentation models – with those in Recycling Segment 5 (39%) and food waste ‘Ideal Advocates’ (38%) more likely to cite food packaging as a concern.

1.2 Perceived benefits and concerns about food packaging

Consumers recognise a range of benefits associated with packaging, as well as raise a series of concerns. In both cases, respondents were initially asked an unprompted question (to assess ‘top of mind’ responses) which was then followed by a question with a range of options that could be selected (to assess the complete picture).

Taking the benefits of food packaging first, the research highlights three ‘top of mind’ benefits: keeping food fresh/fresher, keeping food hygienic/safe/clean and protecting food from damage. When presented with a range of options (Figure 2), the same three top reasons emerge (albeit in a
slightly different order): keeps products safe and hygienic (cited by 55%), protects the food (46%) and helps extend the life of the product (40%). Fewer recognise the role of packaging in allowing seasonal food to be purchased all year round (18%).

Turning to concerns about food packaging, four key issues emerge through the unprompted question: the amount/quantity of food packaging, the type of food packaging (e.g. plastic vs. card); the environmental impact; and difficulties recycling food packaging. When presented with a range of options (Figure 3), the most prominent concerns are the impact on oceans/marine life (66%), goes to landfill (61%) and difficult/not possible to recycle (58%). Concerns also extend to climate change (41%) and health impacts (25%).

The survey confirms that concerns about food packaging are very often centred on plastic specifically and – more so – plastic packaging that cannot readily be recycled. For example:
Recognition of the benefits of food packaging is lower when respondents see the framing of ‘plastic packaging for food’ (rather than ‘food packaging’). Likewise, this framing amplifies the concerns about packaging.

When directly asked about their attitude to different food packaging materials, consumers are significantly more negative towards plastic. Whereas the majority are positive towards cardboard boxes/trays (74%), glass bottles/jars (70%) and metal tins and cans (59%), almost two in three consumers (63%) feel negatively about plastics (vs. 17% positively). By contrast, reactions to recyclable packaging are overwhelmingly positive (86%).

When asked which specific types of packaging most concern them, consumers identify a range of plastics – such as plastic wrappers (e.g. sweet wrappers, crisp packets), black plastic trays, plastic film (e.g. bread bags) and plastic film lids/layers (Figure 4). There is a notable correlation between the materials of most concern and the lack of recycling options (i.e. where packaging can be readily recycled – such as plastic pots and tubs - concern is lower).

Figure 4 – Concerns about specific packaging materials

Q. Which of the following specific types of food packaging, if any, most concern you? Select up to 4.
Base: 6,214 UK adults aged 18+ with any responsibility for food shopping and/or preparation in the home.

<table>
<thead>
<tr>
<th>Specific Packaging Materials</th>
<th>Concern Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plastic wrappers (e.g. crisp packets, sweet wrappers)</td>
<td>48%</td>
</tr>
<tr>
<td>Plastic trays – black</td>
<td>43%</td>
</tr>
<tr>
<td>Plastic film e.g. bread bags, wraps for multi packs</td>
<td>41%</td>
</tr>
<tr>
<td>Plastics film lids/layers (e.g. plastic you peel off of a ready meal tray)</td>
<td>38%</td>
</tr>
<tr>
<td>Plastic drinks bottles (e.g. juice, squash, milk)</td>
<td>31%</td>
</tr>
<tr>
<td>Plastic pots and tubs</td>
<td>28%</td>
</tr>
<tr>
<td>Plastic trays – clear/white</td>
<td>25%</td>
</tr>
<tr>
<td>Laminated foil pouches e.g. for pet food, baby food</td>
<td>17%</td>
</tr>
<tr>
<td>Mixed packaging (e.g. cardboard box and plastic film)</td>
<td>16%</td>
</tr>
<tr>
<td>Cartons (e.g. Tetrapak)</td>
<td>10%</td>
</tr>
<tr>
<td>Metal/aluminium cans and tins</td>
<td>5%</td>
</tr>
<tr>
<td>Glass bottles and jars</td>
<td>4%</td>
</tr>
<tr>
<td>Cardboard trays/packets</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Not concerned about food packaging</td>
<td>7%</td>
</tr>
</tbody>
</table>

1.3 Changes in concern in the past year

Section 1.1 has already discussed the increase in the proportion of consumers expressing concern about the way that food products are packaged, relative to 2012. The survey also specifically asked the extent to which consumers have become more concerned about food packaging in the past year and – if so – the reasons why.

The results demonstrate a pronounced shift in the level of concern about food packaging in the past year - over half of consumers (53%) say they have become more concerned (Figure 5). This is more likely to be consumers in food waste segment: Pressured Providers; recycling segments 3 and 5; Guardian/Observer readers as well as freesheet newspaper readers; those in social class ABC1; Women; and 25-44s.
Turning to the influences that have led to this change, consumers point to raised awareness and publicity about packaging and plastic waste, news/media coverage, and TV shows/documentaries (with the Blue Planet series and Sir David Attenborough specifically mentioned).

### 1.4 Attitudes to compostable and biodegradable packaging

The research highlights that consumers are positive towards both biodegradable and compostable packaging (and it also suggests that these two terms are considered to mean the same thing). Over four in five consumers (81%) are positive towards biodegradable packaging, and almost the same proportion (79%) are positive towards compostable packaging (Figure 6).

Furthermore, 77% of consumers agree that compostable/biodegradable packaging is better for the environment than other types of packaging – a view prevalent across all sub-groups and audiences.
1.5 Packaging, freshness and food waste

One of the most notable changes since 2012 is the increasing number of consumers – albeit still a minority overall - who recognise the role of packaging in keeping food fresher for longer and reducing food waste (Figure 7). For example, 38% agree with the statement ‘storing food at home in its original packaging keeps it fresher for longer’ (compared to 26% in 2012). Likewise, a similar proportion (36%) agree that ‘packaging helps to reduce food waste’ (which represents more than double the 15% who agreed with this in 2012). This is most evident among younger consumers aged 18-34, social class AB and those in recycling segment 1.

However, it also true that the majority of consumers believe the opposite – over half (59%) agree that keeping food in its original packaging makes it sweat and go off quicker, with represents no change since 2012 when 61% thought the same. This view is most prevalent among older consumers aged 55+, recycling segment 5 and food waste Ideal Advocates.

![Figure 7 – The role of packaging in reducing food waste and keeping food fresh](image)

Q. Here are some statements. Please tell us how much you agree or disagree with each one?
Base: 6,214 UK adults aged 18+ with any responsibility for food shopping and/or preparation in the home.

<table>
<thead>
<tr>
<th>Statement</th>
<th>2018</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storing food at home in its original packaging keeps it fresher for longer</td>
<td>Strongly agree: 8%</td>
<td>Tend to agree: 30%</td>
</tr>
<tr>
<td>Packaging helps to reduce food waste</td>
<td>Strongly agree: 8%</td>
<td>Tend to agree: 28%</td>
</tr>
<tr>
<td>Keeping fresh fruit and vegetables in their original packaging makes them ‘sweat’ and go off quicker</td>
<td>Strongly agree: 18%</td>
<td>Tend to agree: 41%</td>
</tr>
</tbody>
</table>

1.6 Packaging waste vs. food waste

In order to assess the way in which consumers trade off the issue of packaging waste against the issue of food waste, the survey asked them which of the two is a bigger climate change problem (on the basis that there is an objectively correct answer here, whereas judgements about which is a bigger ‘environmental’ problem is subjective depending on which criteria are applied).

The results demonstrate that close to one in ten (9%) consumers correctly acknowledge that food waste is a bigger climate change issue than packaging waste (Figure 8). In contrast, around four times as many consumers (38%) think the reverse. A large group of consumers (32%) think the two issues are equally big climate change problems.
1.7 Receptivity to messages about food packaging

One of the research's objectives was to understand the extent to which consumers are receptive to positive messages about the role and benefits of food packaging. The results demonstrate that a significant proportion of consumers are open to messages that emphasise positive aspects of food packaging (Figure 9). For example, almost two in three (62%) are more positive in response to a message that the majority of packaging can be recycled; while over half (56%) are more positive about packaging extending the life of the product at home. It is also noteworthy, however, that a large group of consumers – between 33% and 44% across the three statements shown - are unmoved by these messages.

Receptivity extends across all groups of consumers – although it is 18-34s, recycling segment 5 and food waste segment ADs who are more likely to become ‘much more positive’.

1.8 Packaging innovations

The proportion of consumers who have noticed various forms of packaging innovations is largely unchanged from 2012. What has changed is the innovations that consumers say they would find most useful/important to them – with a clear top five emerging (Figure 10): packaging that is recyclable (cited by 54%), re-sealable (40%), made from recycled content (35%), biodegradable/compostable (32%) and re-fillable/usable (32%).

With the exception of re-sealable packaging (which was already prominent in 2012), all of these have significantly increased in usefulness among consumers – reflecting a marked shift towards issues that influence the disposal of the packaging (as opposed to the use/re-use of the product).

![Figure 10 – Packaging innovations that would be most useful](image)

1.9 Food packaging and recycling

A recurring and key theme throughout the research is the relationship between food packaging and recycling. For example, this report has already noted the following:

- The difficulty recycling some forms of food packaging is repeatedly highlighted as a key concern for consumers;
- The specific materials of most concern (i.e. various types of plastic film and wrapping) are those that cannot readily or consistently be recycled;
- In contrast, reactions to recyclable food packaging are positive and, moreover, when asked what innovations they would find most useful, consumers top ‘ask’ is packaging that can be recycled.

The survey also asked consumers in what ways they could be helped to recycle more packaging. The results (Figure 11) demonstrate that over half (59%) opt for all packaging having a clear and definitive labelling system with no ambiguity (i.e. no ‘check locally’ option). This is followed by items made of single polymers to make them easier to recycle (51%) and making the individual components of multi-material packaging easier to separate and recycle (49%). A sizeable proportion (32%) also cite the need for greater recycling capacity at home (e.g. bigger bins/boxes).
The survey also makes clear that a singular focus to increase the recyclability of food packaging would go some way to addressing consumers’ concerns about food packaging. Indeed, over half of UK consumers (59%) agree with the statement ‘I’m less concerned about packaging, including plastics, if my council collects it for recycling and it does get recycled’. In contrast, just over one in five (22%) disagree with this view.

Moreover, when asked to select one option from a list of things that could help mitigate negative impacts (Figure 12), the most cited answer (44%) is making all food packaging 100% recyclable so it can be recycled irrespective of where consumers live (highlighting not only the need to increase recyclability but also the consistency of services as well). This is followed by 17% of consumers who think the key focus should be making all food packaging biodegradable and compostable; and a similar proportion (16%) who think the focus should be on eliminating plastic food packaging specifically (even when alternatives have other negative impacts, e.g. CO2 emissions).