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FRIENDS OF GLASS

GLOBAL REPORT – SEPTEMBER 2022

FOR

Michael Delle Selve | m.delleselve@feve.org

FROM

Simon Quaschning | Simon.Quaschning@insites-consulting.com

Laurens De Seranno | Laurens.Deseranno@insites-consulting.com

Tala Nassif | Tala.Nassif@insites-consulting.com



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RESEARCH BACKGROUND

DETAILED RESULTS

EXECUTIVE SUMMARY

RESEARCH BACKGROUND

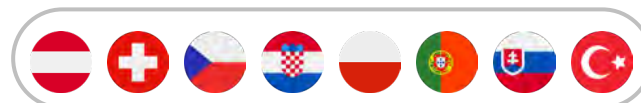
OBJECTIVES

- Identify Glass consumption evolvement over last 3 years
- Identify main drivers and barriers of glass consumption
- Understand main attitudes towards sustainability and the position of glass to these attitudes
- Scope: 13 countries

Tier 1:



Tier 2:



ABBREVIATIONS USED THROUGHOUT REPORT

T1B%: Top 1 Box (e.g., completely agree)

T2B%: Top 2 Box (e.g., agree & completely agree)

B2B%: Bottom 2 Box (e.g., completely disagree, disagree)

Delta: T2B% - B2B%

METHODOLOGY

Method: Online quantitative survey

Fieldwork period: June 2022

Interview length: 15 minutes

Country: Spain, UK, Germany, Italy, France, Austria, Switzerland, Czech Republic, Croatia, Poland, Portugal, Slovakia, Turkey

Screening & sample composition:

- Nat rep on age & region
- 75% women / 25% men
- Co-responsible for household purchases

Sample size:

- **N = 500 for 1st tier countries**
 - Spain, UK, Germany, Italy, France
- **N = 200 for second tier countries**
 - Austria, Switzerland, Czech Republic, Croatia, Poland, Portugal, Slovakia, Turkey

SURVEY STRUCTURE / BLOCKS

INFLUENCES ON
PURCHASING BEHAVIOUR

EVOLVING PREFERENCE
FOR GLASS

ATTITUDES TOWARDS
SUSTAINABILITY

HEALTH & PRODUCT
PRESERVATION

ATTITUDES TO REUSE &
RECYCLING

DESIGN & BRANDING
OF GLASS PACKAGING

COUNTRY
SCORECARDS

SAMPLE PROFILING | $N = 4107$



Results on a European level assume an equal weight of each country for the final score.

Tier 1:



Tier 2:



COMPARABILITY WITH DIFFERENT WAVES

2022

SAMPLE
n=4 107

COUNTRIES

- **Tier 1** (n=2502)
 - France
 - Italy
 - Germany
 - Spain
 - UK
- **Tier 2** (n=1605)
 - Austria
 - Croatia
 - Czech Republic
 - Slovakia
 - Switzerland
 - Turkey
 - **Poland**
 - **Portugal**

2020

SAMPLE
n=10 605

COUNTRIES

- **Tier 1** (n=1000)
 - France
 - Italy
 - Germany
 - Spain
 - UK
 - Poland
 - Portugal
- **Tier 2** (n=600)
 - Austria
 - Croatia
 - Czech Republic
 - Slovakia
 - Switzerland
 - Turkey

2016

SAMPLE
n=13 054

COUNTRIES

- **Tier 1** (n=2000)
 - France
 - Italy
 - Germany
 - Spain
 - UK
- **Tier 2** (n=500)
 - Austria
 - Croatia
 - Czech Republic
 - Poland
 - Slovakia
 - Switzerland

2014

SAMPLE
n=8135

COUNTRIES

- **Tier 1** (n=1000)
 - France
 - Italy
 - Germany
 - Spain
 - UK
- **Tier 2** (n=500)
 - Austria
 - Croatia
 - Czech Republic
 - Poland
 - Slovakia
 - Switzerland

2010

SAMPLE
n=8621

COUNTRIES (n=500)

- Belgium
- Netherlands
- France
- Germany
- Spain
- Austria
- Czech Republic
- Greece
- Hungary
- Italy
- Poland
- Portugal
- Slovakia
- Switzerland
- Turkey
- UK



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KEY CONCLUSIONS



Purchase Behaviour of Glass

- Purchase of products in glass has increased
- Driven by perceived **recyclability** and positive **impact on environment**
- Consumers **recommend glass** packaging and see it as a **material of the future**
- **Barriers** for glass: **convenience** and perceived **price**



Sustainability & Health

- Most relevant aspects of the sustainability debate: **reducing food waste** and **increasing recycling**
- **Companies should play a major role** by using **sustainable packaging** and **informing consumers about recycling**
- Glass is important in this debate as it's seen as a good material to prevent **health** and **environmental concerns**
- **Glass packaging is also trusted when recycled** aside from Plastic/PET



Reuse & Recycling

- **Most EU consumers recycle**, which is seen as **self-evident** and **key to live more sustainable**
- This is supported by **efficient local collection and recycling systems** in most areas
- Most consumers believe that **glass is effectively recycled**
- **More limited opportunity for a DRS system** (1 in 4 believe in such a system and 1 in 5 are willing to pay deposit)
- In **direct comparison**, consumers prefer a **bottle bank** solution



Design & Branding

- **7 out of 10** report that packaging plays a crucial role in telling brands apart and enhancing the value of a product. This is also the case for **glass**.
- Consumers **easily recall global and local brands** with **distinctive glass packaging**, such as **Coca-Cola, Nutella, Barilla** or **Heinz**.



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INFLUENCES ON PURCHASING BEHAVIOUR



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KEY RESULTS

Preference for glass is growing due to strong eco-conscious properties and despite a lack of convenience

- **Glass usage has increased globally** compared to other kinds of packaging, especially in **Turkey, Poland and Austria**.
- Mainly because of the **perceived recyclability of glass** and its **positive impact on the environment**.
- Glass packaging barriers include the **perceived expensiveness** and **convenience** (heavier, more difficult to transport etc..)
- Consumers could be **further encouraged to buy glass packages** instead of others by working on (perceived) **affordability, convenience (lighter packaging)** and a good **availability of their favourite products in glass packs**.

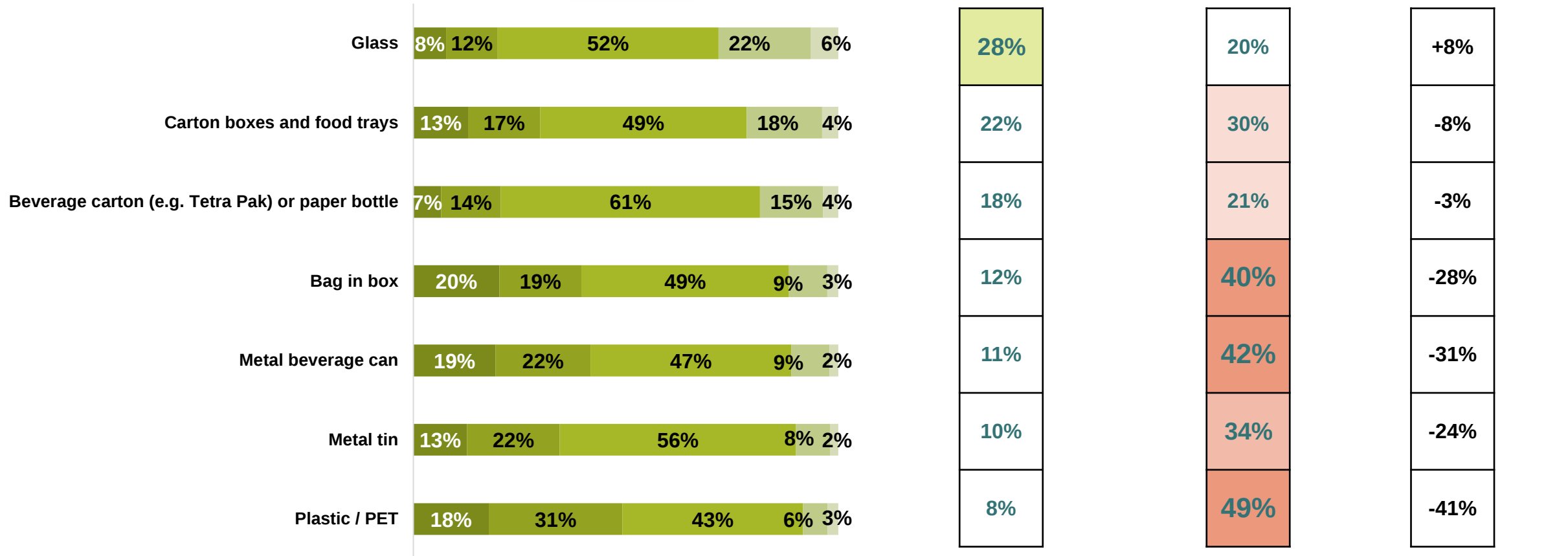


Glass is the only packaging material that shows increased usage

Glass is the only packaging material that shows an increased usage trend over the past 3 years (8% higher compared to 3 years ago), globally. Bags, metal, plastic are on the contrary much less used with results between 24 and 41%.



Total Sample

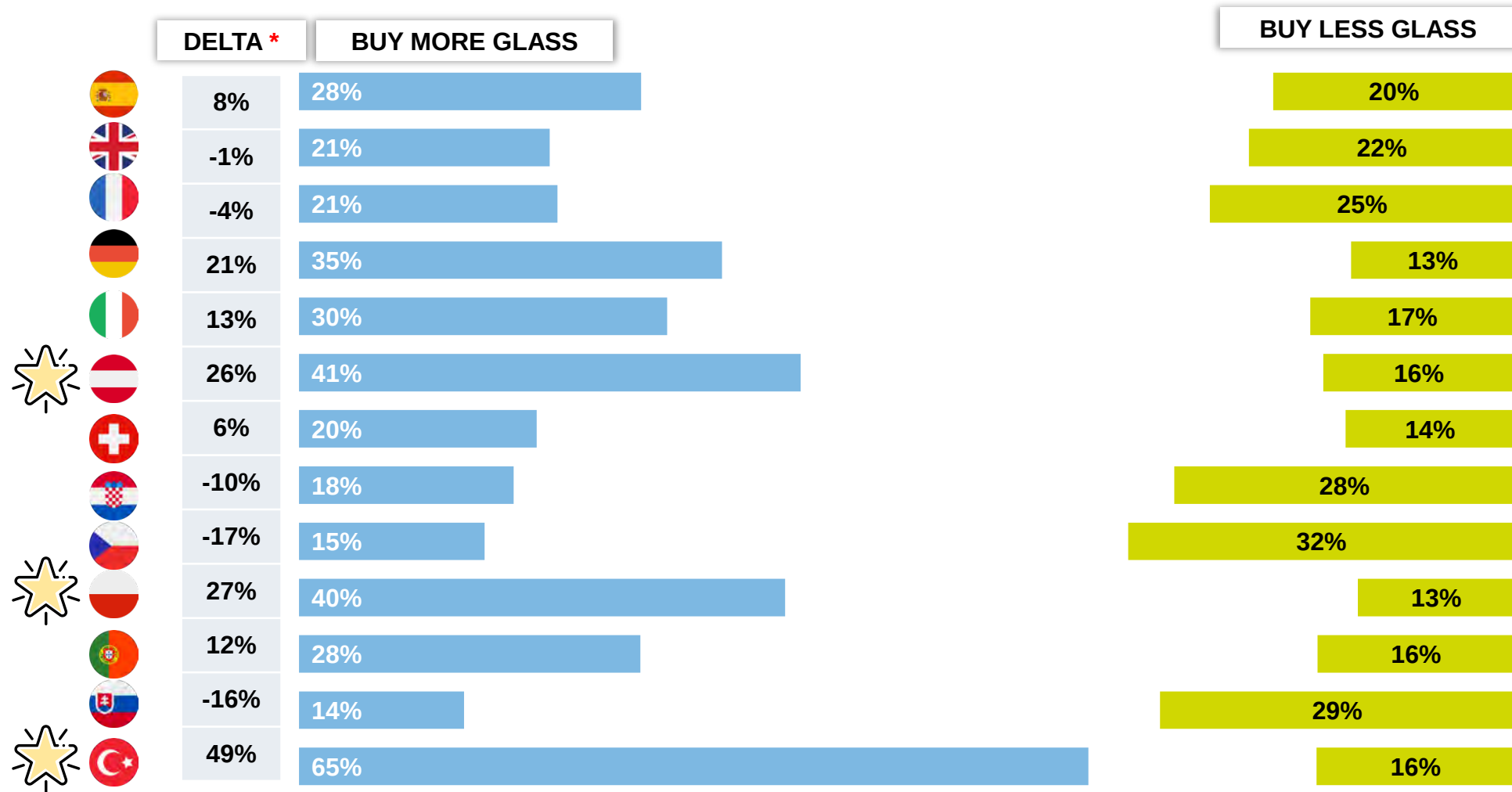


■ Buy it much less ■ Buy it less ■ Buy it about the same ■ Buy it more ■ Buy it much more

Q7: Compared to 3 years ago, in what way has your purchase of food and beverages in each of the following packaging materials evolved? - N=4107

In Turkey, Poland and Austria, usage of glass is increasing the strongest

In Austria, Poland and especially in Turkey, the purchase of food and beverages in glass is increasing, contrary to Croatia, Slovakia and especially Czech Republic where there is a decreasing trend in glass usage. In France, Switzerland, Spain and UK, glass usage is quite stable.



Q7: Compared to 3 years ago, in what way has your purchase of food and beverages in each of the following packaging materials evolved? - N=4107

* Delta: [% Buy more] – [% Buy less]



Purchase of packaging material over time *by country*

Glass shows a more positive trend than other materials globally, which is particularly the case in Turkey, Poland, Austria, Germany and Italy. PET is decreasing most noticeably in Austria, while metal cans also show a decrease, particularly in France, Germany and Portugal.



														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Delta = [% Buy more] – [% Buy less] *														
Glass	8%	8%	-1%	-4%	21%	13%	26%	6%	-10%	-17%	27%	12%	-16%	49%
Beverage carton (e.g. Tetra Pak) or paper bottle	-2%	7%	-2%	-14%	-11%	2%	-18%	3%	-3%	-11%	14%	17%	-14%	13%
Carton boxes and food trays	-8%	-3%	4%	-19%	-3%	-2%	5%	-16%	-35%	-35%	8%	3%	-42%	-1%
Metal tin	-24%	-23%	-6%	-30%	-24%	-20%	-30%	-15%	-36%	-43%	-26%	-33%	-32%	-30%
Bag in box	-28%	-10%	-20%	-43%	-32%	-31%	-32%	-36%	-35%	-35%	-25%	-9%	-49%	-10%
Metal beverage can	-31%	-25%	-13%	-45%	-43%	-27%	-35%	-26%	-33%	-26%	-31%	-43%	-27%	-27%
Plastic / PET	-41%	-48%	-38%	-47%	-34%	-42%	-55%	-23%	-33%	-32%	-42%	-50%	-39%	-42%

Significantly **higher** / **lower** Country vs. Global

Q7: Compared to 3 years ago, in what way has your purchase of food and beverages in each of the following packaging materials evolved? – N=4107

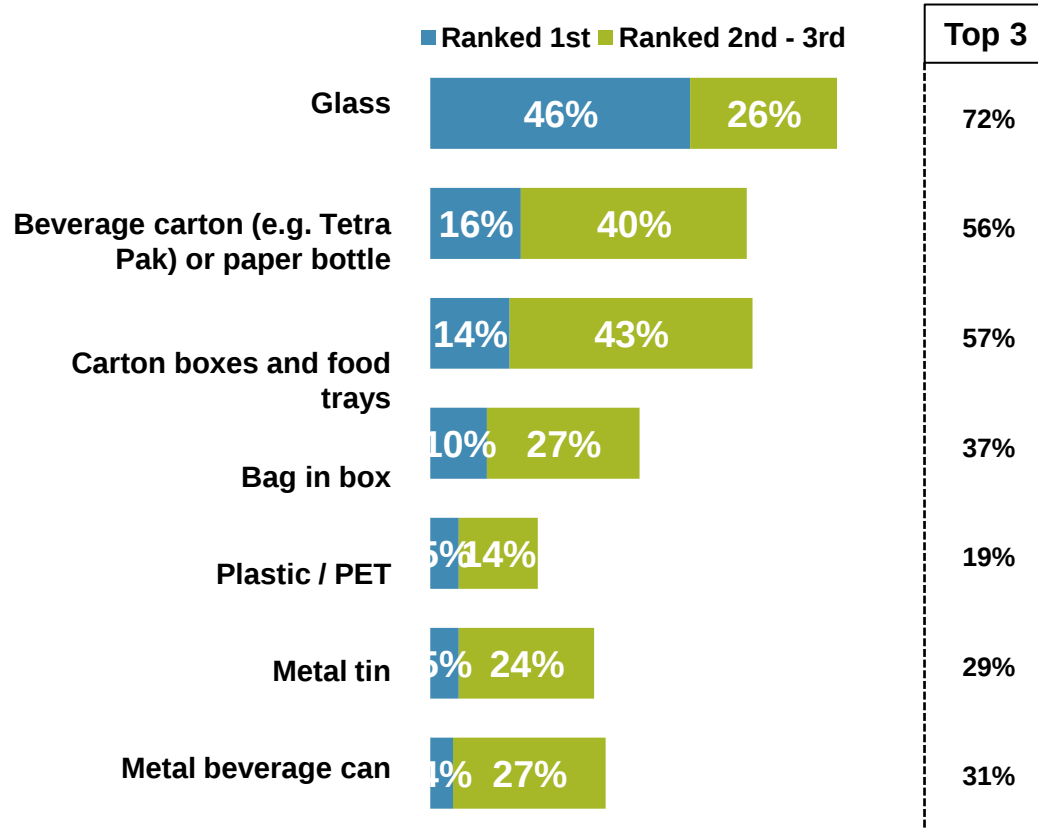
* Delta: [% Buy more] – [% Buy less]

Zoom in on Spain & Italy

The majority of Spanish consumers prefer to buy products packaged in glass. Carton/paper bottles are considered second. PET and metal are less relevant. Consumers in Italy rank glass as their most preferred packaging solution, followed by Tetra Pak and carton boxes.



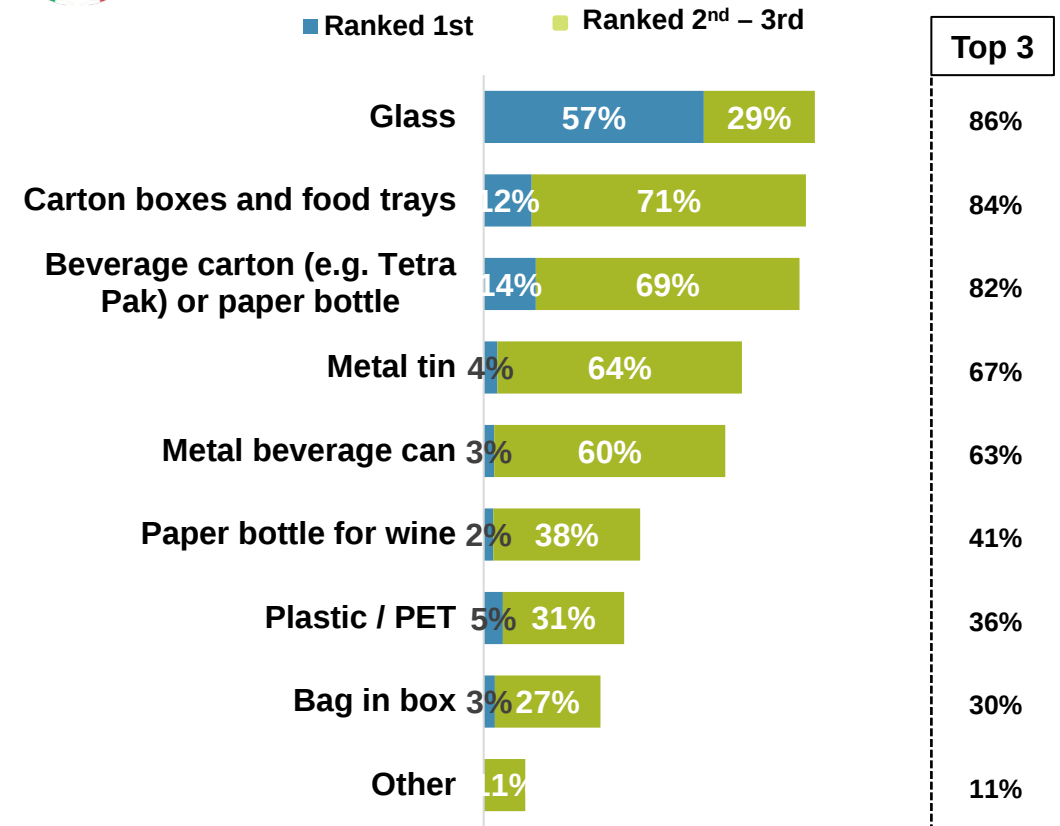
Preferred packaging for packaged food and beverages in supermarket



Q12 : Which would be your preferred packaging solution when you want to buy packaged food and beverages at the supermarket? Please rank the following packaging options from most preferred to least preferred. – N=500



Preferred packaging



Q21: There is an increasing number of packaging options available on the market. Below, we have listed some of the most common – both new and existing – packaging solutions. Please choose up to 5 packaging options and rank them in order of your personal preference. - N=502

Sustainability and recyclability are key drivers for glass

Globally, consumers buy more glass because of its recycling properties, and the positive impact it has on the environment. Many also consider glass to be better at preserving health than other materials.



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Total Sample



28%

buy MORE glass compared to 3 years ago

Among them

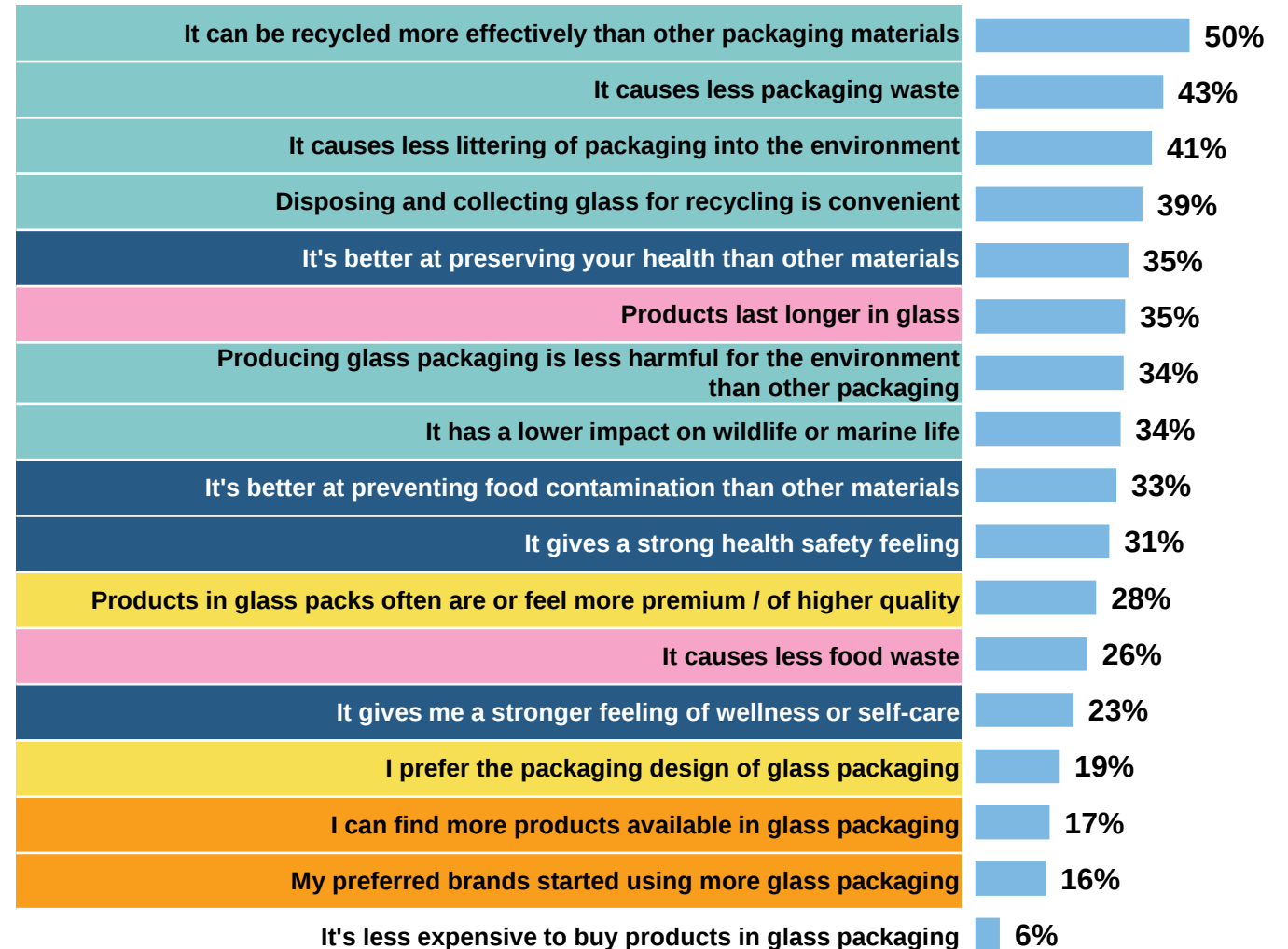
Environmental impact

Health

Food conservation

Premiumness

Offer availability



Glass drivers *by country*

Sustainability and recyclability are key across all markets, but particularly pronounced in Germany, Austria and Portugal. In Turkey, glass also gives a strong safety feeling, which is the main driver. Food contamination is key in Poland and the Czech Republic.



														
	Total N=1158	N=141	N=103	N=106	N=174	N=152	N=83	N=39	N=35	N=31	N=80	N=56	N=27	N=130
It can be recycled more effectively than other packaging materials	50%	56%	56%	46%	48%	48%	52%	54%	53%	50%	47%	65%	52%	35%
It causes less packaging waste	43%	40%	40%	41%	57%	41%	49%	48%	28%	36%	30%	45%	58%	42%
It causes less littering of packaging into the environment	41%	37%	29%	33%	48%	25%	56%	48%	38%	42%	47%	47%	66%	45%
Disposing and collecting glass for recycling is convenient	39%	33%	33%	30%	39%	35%	44%	40%	29%	47%	44%	41%	46%	52%
It's better at preserving your health than other materials	35%	39%	24%	22%	36%	30%	30%	32%	67%	34%	38%	26%	46%	54%
Products last longer in glass	35%	34%	33%	31%	29%	28%	21%	32%	48%	33%	40%	35%	55%	53%
Producing glass packaging is less harmful for the environment than other packaging	34%	37%	33%	29%	25%	36%	32%	31%	40%	29%	33%	41%	49%	44%
It has a lower impact on wildlife or marine life	34%	32%	39%	28%	30%	42%	29%	25%	20%	38%	44%	39%	42%	28%
It's better at preventing food contamination than other materials	33%	37%	28%	14%	20%	30%	32%	27%	42%	54%	43%	31%	48%	53%
It gives a strong health safety feeling	31%	34%	18%	17%	28%	21%	32%	20%	31%	26%	40%	30%	33%	62%
Products in glass packs often are or feel more premium / of higher quality	28%	25%	24%	18%	33%	23%	35%	28%	37%	26%	25%	13%	30%	43%
It causes less food waste	26%	29%	18%	32%	23%	28%	23%	23%	20%	14%	20%	22%	46%	33%
It gives me a stronger feeling of wellness or self-care	23%	28%	23%	19%	24%	18%	15%	28%	6%	13%	36%	12%	38%	27%
I prefer the packaging design of glass packaging	19%	22%	18%	25%	18%	9%	14%	18%	32%	28%	25%	13%	31%	25%
I can find more products available in glass packaging	17%	19%	24%	12%	11%	12%	22%	5%	16%	23%	26%	23%	21%	20%
My preferred brands started using more glass packaging	16%	19%	22%	7%	15%	12%	15%	2%	22%	14%	20%	16%	17%	24%
It's less expensive to buy products in glass packaging	6%	5%	10%	1%	7%	4%	5%	3%	9%	9%	2%	12%	4%	6%

Q8: You indicated that you buy more products in glass compared to 3 years ago. Please specify why - N=1158

Significantly **higher** / **lower** Country vs. Global

Glass purchase can be encouraged by a combination of pricing, product choice and convenience

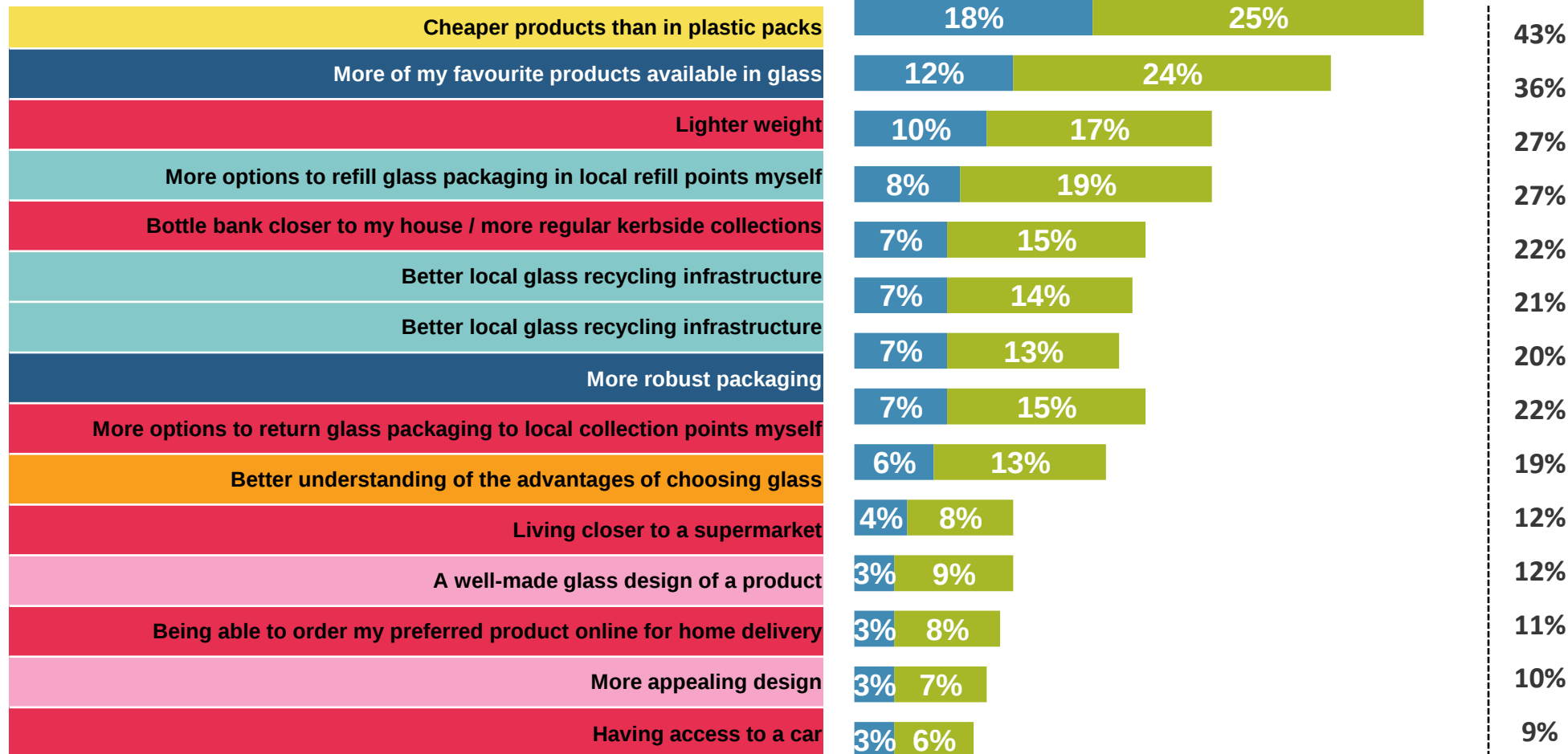
The top encouraging factor to purchase glass would be to make glass products more affordable, increasing the glass products currently available on the market, and making glass packaging lighter.



Total Sample

Ranked 1st Ranked 2nd - 3rd

Top 3



- Pricing
- Product Specs
- Recycling
- Convenience
- Education
- Design

Factors that would encourage glass purchases by country

Results in Turkey, Spain and Italy confirm there is a need for more local collection options as they have expressed more difficulties about disposal of glass.



Top 3															
		Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Cheaper products than in plastic packs		43%	50%	40%	45%	35%	45%	43%	40%	47%	53%	45%	48%	48%	11%
More of my favourite products available in glass		36%	44%	35%	32%	39%	36%	43%	46%	34%	42%	40%	35%	31%	21%
Lighter weight		27%	31%	23%	29%	34%	26%	33%	34%	21%	33%	24%	22%	36%	7%
More options to refill glass packaging in local refill points myself		26%	36%	26%	22%	24%	25%	33%	30%	29%	25%	21%	27%	18%	17%
Bottle bank closer to my house / more regular kerbside collections		23%	16%	22%	29%	18%	21%	20%	24%	27%	16%	18%	24%	24%	34%
Better local glass recycling infrastructure		21%	20%	24%	21%	23%	20%	22%	16%	22%	19%	24%	18%	21%	35%
Better local glass recycling infrastructure		20%	21%	12%	24%	20%	22%	15%	15%	22%	24%	22%	25%	7%	35%
More robust packaging		22%	21%	22%	21%	17%	18%	20%	15%	24%	21%	37%	26%	30%	19%
More options to return glass packaging to local collection points myself		19%	15%	20%	16%	16%	22%	16%	19%	12%	7%	15%	28%	15%	47%
Better understanding of the advantages of choosing glass		12%	7%	12%	11%	14%	12%	14%	12%	13%	16%	11%	10%	14%	10%
Living closer to a supermarket		12%	11%	18%	14%	12%	11%	9%	12%	12%	9%	12%	12%	11%	23%
A well-made glass design of a product		11%	11%	14%	9%	16%	13%	11%	11%	12%	9%	6%	7%	10%	13%
Being able to order my preferred product online for home delivery		10%	7%	11%	11%	9%	10%	5%	9%	13%	7%	15%	9%	10%	20%
More appealing design		9%	6%	12%	8%	12%	10%	9%	10%	11%	12%	7%	6%	6%	5%
Having access to a car		9%	6%	12%	8%	12%	10%	9%	10%	11%	12%	7%	6%	6%	5%
Other		1%	1%	2%	1%	1%	1%	1%	1%	1%	2%	0%	2%	2%	0%

Significantly higher / lower Country vs. Global

Q10: What would encourage you to buy products in glass packaging more often? Choose up to 5 factors – N=4107

EVOLVING PREFERENCE FOR GLASS



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KEY CONCLUSIONS

Glass is perceived as a safe and sustainable material for the future, although can be considered pricey by some consumers.

- **8 out of 10 consumers** believe in **glass** as a material for the future and would recommend it to friends and family.
- Glass packaging is seen as a **safe** and **eco-friendly** option, especially in **Turkey, Portugal and Spain**.
- **Willingness to pay a premium for glass packs is limited.** Only 50% are actually willing to pay more to have glass packaging.

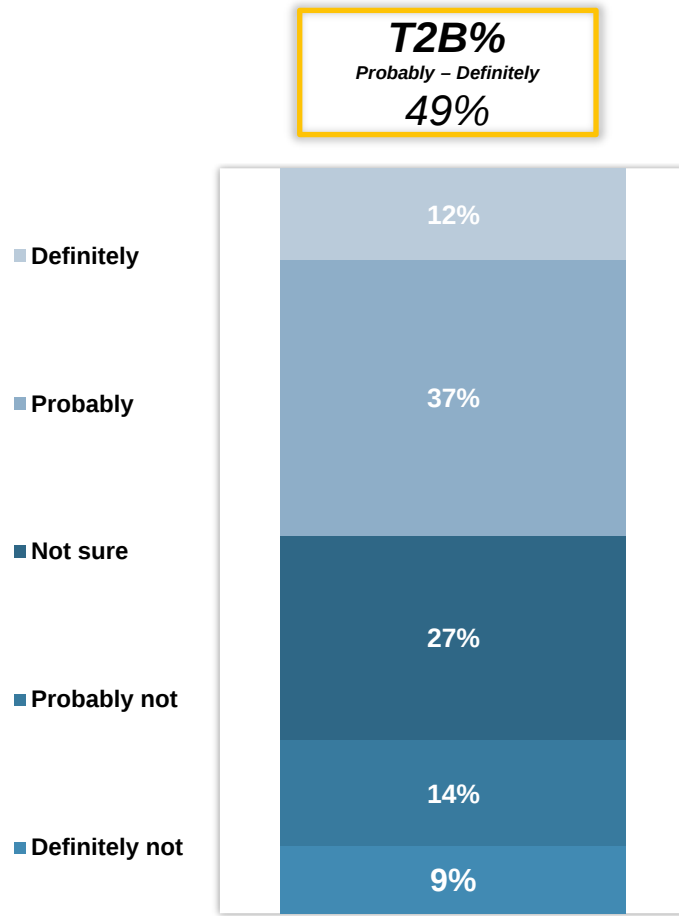


Most consumers would recommend glass and find it future proof

Around 80% of consumers mostly agree that glass is a product that fits the future and would recommend glass packaging to their friends and families. Nevertheless, only 50% would be willing to pay more for glass packaged products.

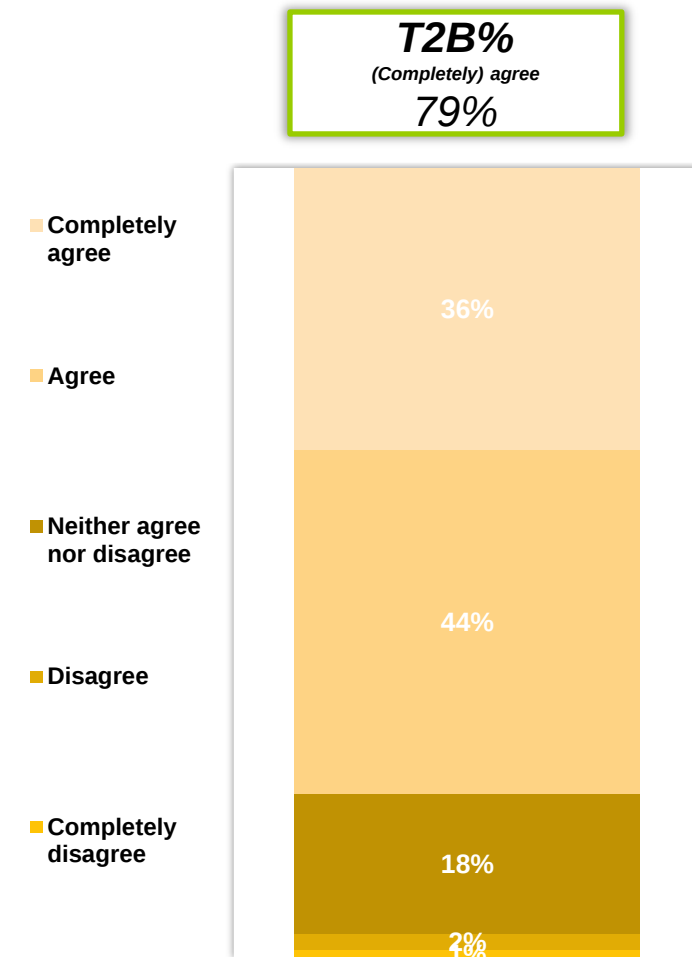


Willingness to pay more for product in glass



Q39: Imagine you are in a supermarket, looking to buy a specific product. In general, would you be willing to pay more for the product if it came in glass packaging? – N=4107

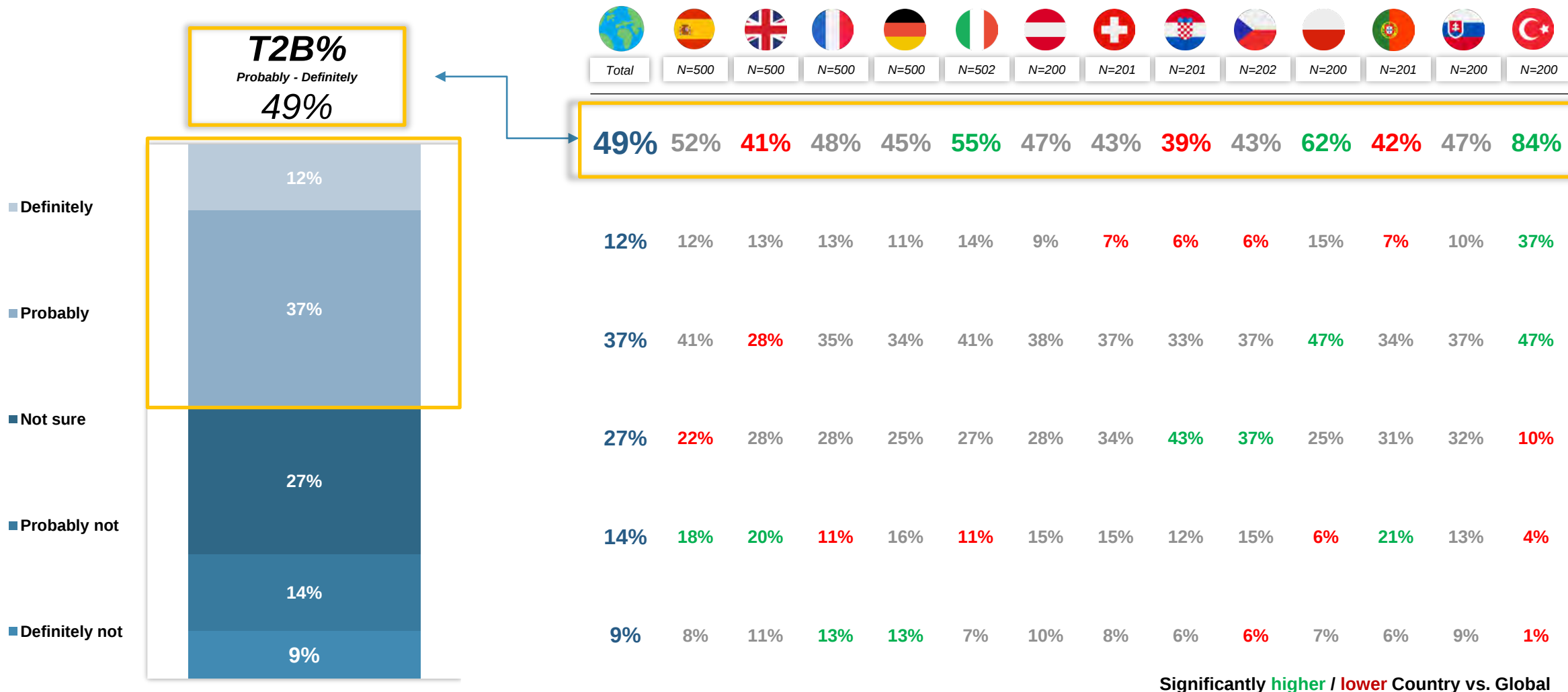
Glass as a future proof material



Q44 :To what extent do you agree that glass is a material that is fit for the future? - N=4107

Willingness to pay more for glass packaging

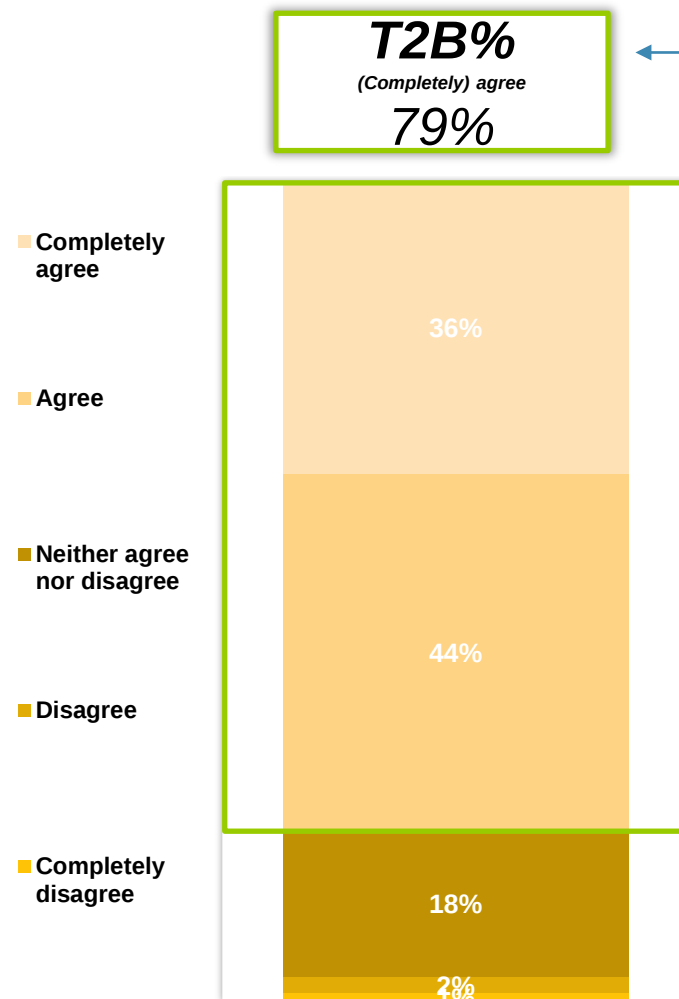
Around 50% of consumers would pay more for a product in glass packaging. This is particularly true for consumers in Poland and Turkey. For Turkey, this is consistent with a lower price sensitivity as a factor to encourage purchases of more products in glass.



Q39: Imagine you are in a supermarket, looking to buy a specific product. In general, would you be willing to pay more for the product if it came in glass packaging? - N=4107

Glass as a future proof material

8 out of 10 consumers agree that glass is a material that is fit for the future, especially in Spain and Turkey.

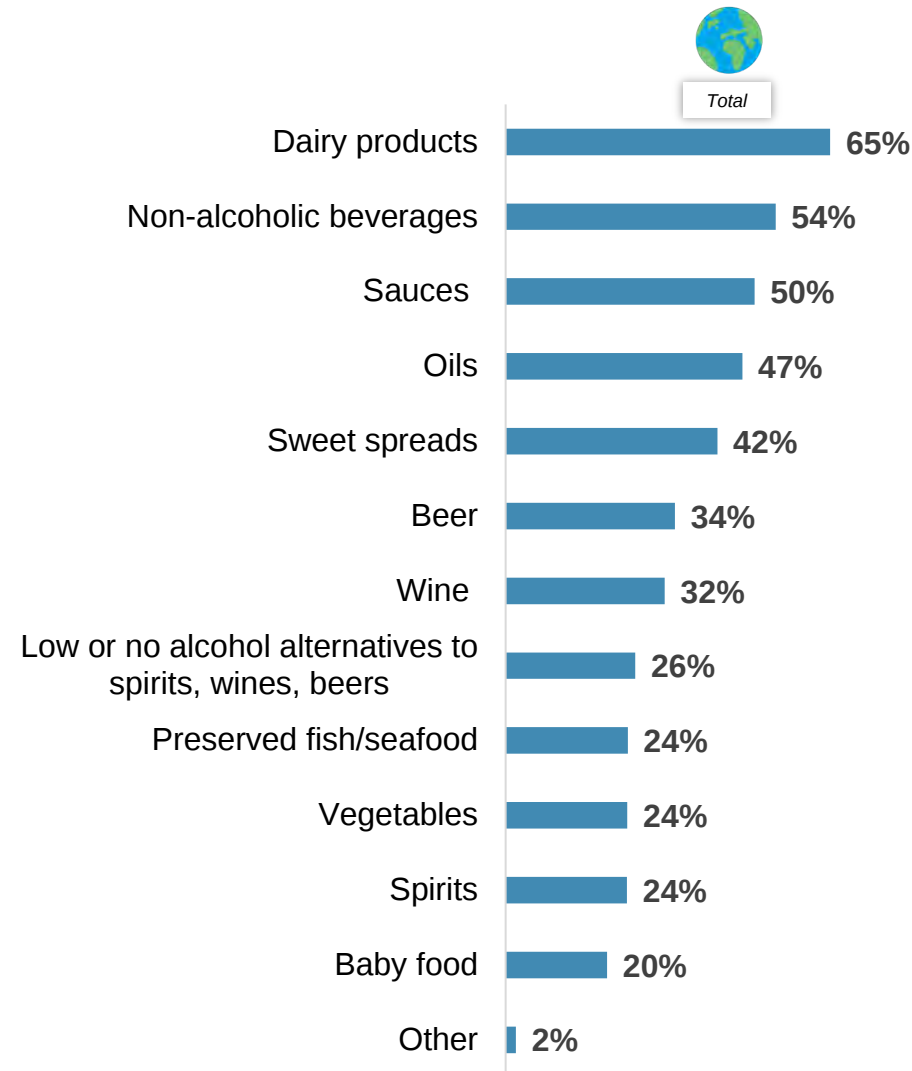


Total	Spain	UK	France	Germany	Italy	Austria	Switzerland	Croatia	Czechia	Poland	Portugal	Slovakia	Turkey
N=500	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
79%	86%	76%	76%	75%	81%	80%	83%	74%	78%	72%	83%	78%	94%
36%	43%	31%	36%	35%	38%	40%	28%	27%	28%	30%	32%	30%	62%
44%	43%	45%	40%	40%	42%	40%	56%	47%	51%	42%	51%	47%	32%
18%	12%	19%	21%	22%	17%	18%	15%	23%	20%	22%	16%	20%	4%
2%	2%	3%	2%	2%	1%	2%	1%	2%	1%	4%	1%	0%	1%
1%	0%	2%	1%	1%	1%	0%	1%	0%	0%	1%	0%	2%	1%

Significantly higher / lower Country vs. Global

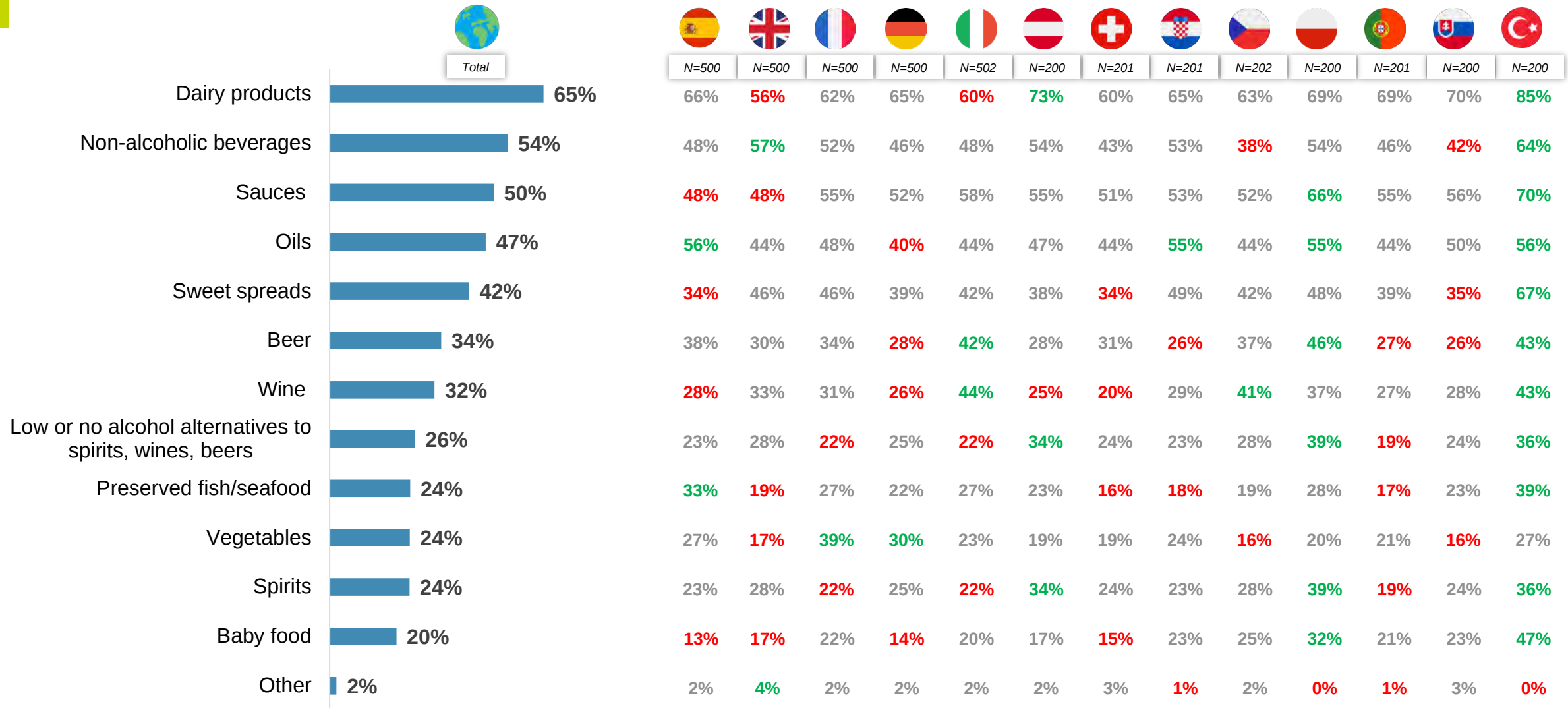
Glass packaging products preferences

The majority of consumers would like to see dairy products in glass packaging, especially in Turkey and Austria. This is followed by nonalcoholic beverages, sauces, and oils.



Glass packaging products preferences

The majority of consumers would like to see dairy products in glass packaging, especially in Turkey and Austria. This is followed by nonalcoholic beverages, sauces, and oils.



Significantly **higher** / **lower** Country vs. Global

Q11: Which of the following product categories would you like to find (more) in glass packaging on shelves in a store? - N=4107

ATTITUDES TOWARDS SUSTAINABILITY



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KEY CONCLUSIONS

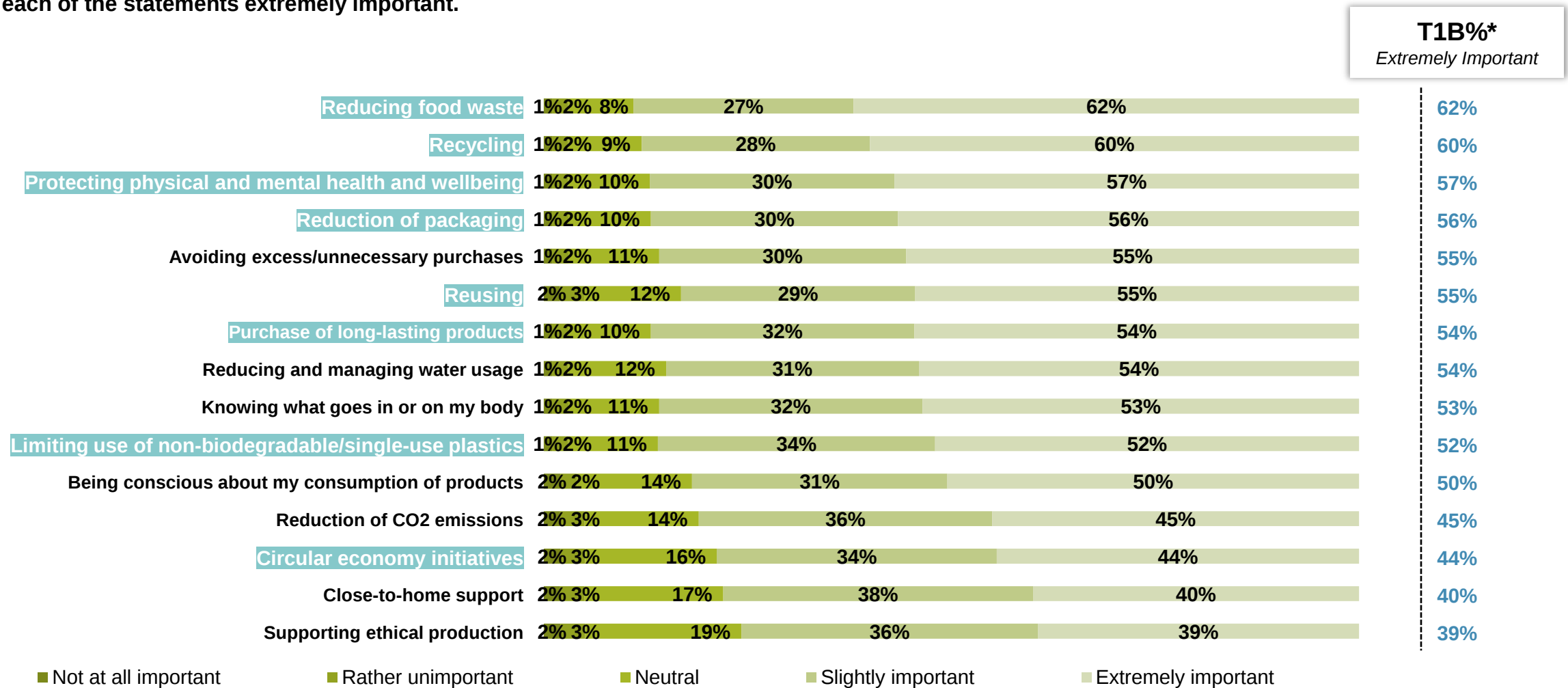
Sustainability is a topic that respondents care about and have a moral obligation towards

- **Sustainability** is seen as a broad subject. Yet, the most sensitive points of sustainability revolve around **reducing food waste** and **increasing recycling**.
- In some countries it seems the topic of sustainability is more active than others, such as **Turkey, Portugal and Poland**.
- In other countries such as UK and Germany, the results are lower, which **which could also suggest a more advanced and nuanced understanding of the debate** in those markets.
- **Companies have a responsibility towards sustainable packaging** and should clearly **mention how the packaging is being recycled** after usage.



Consumers consider a variety of sustainability factors as highly important

6 out of 10 consumers consider reducing food waste, recycling and protecting physical and mental health and wellbeing as the top three sustainability elements in their every day life. However, other factors are also relevant, with at least half of the respondents finding each of the statements extremely important.



Q14: Sustainability can cover a wide range of behaviours, from environmental issues to social and economic factors. Below, we will present you with some topics related to sustainability. Please indicate how important each of these elements are to you in your everyday life. - N=4107

* For sustainability-related questions, we look at the T1B% to compensate for social bias

Importance of sustainability elements *by country*

Consumers in Turkey, Portugal, Poland, and Spain are much more engaged with sustainability topics. Scores are still high, but lower than average in France, Germany, Switzerland and the Czech Republic and Germany, which could also suggest a more advanced and nuanced understanding of the debate.



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T1B%

Extremely important

	 Total	 N=500	 N=500	 N=500	 N=500	 N=502	 N=200	 N=201	 N=201	 N=202	 N=200	 N=201	 N=200	 N=200
Reducing food waste	62%	63%	59%	53%	55%	59%	66%	63%	69%	51%	80%	85%	58%	82%
Recycling	60%	64%	61%	50%	49%	61%	53%	54%	68%	49%	71%	83%	64%	69%
Protecting physical and mental health and wellbeing	57%	68%	53%	51%	46%	58%	56%	46%	61%	37%	64%	74%	56%	77%
Reduction of packaging	56%	62%	57%	50%	48%	53%	61%	48%	61%	43%	67%	72%	54%	70%
Reducing and managing water usage	55%	62%	52%	49%	43%	54%	43%	43%	65%	38%	71%	82%	58%	79%
Limiting use of non-biodegradable/single-use plastics	55%	66%	52%	50%	39%	61%	45%	37%	57%	47%	65%	76%	57%	70%
Avoiding excess/unnecessary purchases	54%	62%	55%	49%	45%	53%	54%	42%	57%	33%	61%	67%	59%	76%
Knowing what goes in or on my body?	54%	63%	52%	48%	42%	56%	49%	46%	69%	31%	51%	68%	61%	76%
Reusing	53%	63%	51%	42%	45%	50%	49%	43%	60%	44%	65%	77%	64%	68%
Purchase of long-lasting products	52%	58%	51%	50%	50%	42%	46%	41%	56%	35%	63%	64%	50%	74%
Reduction of CO2 emissions	50%	60%	47%	44%	42%	51%	40%	34%	58%	30%	57%	78%	53%	69%
Being conscious about my consumption of products	45%	51%	41%	35%	39%	43%	42%	35%	53%	30%	57%	64%	55%	68%
Circular economy initiatives	44%	55%	44%	32%	38%	44%	39%	36%	54%	31%	53%	64%	47%	56%
Close-to-home support	40%	47%	37%	31%	36%	38%	43%	33%	52%	25%	48%	45%	40%	60%
Supporting ethical production	39%	46%	41%	31%	28%	37%	26%	28%	47%	18%	48%	61%	39%	72%

Significantly **higher** / **lower** Country vs. Global

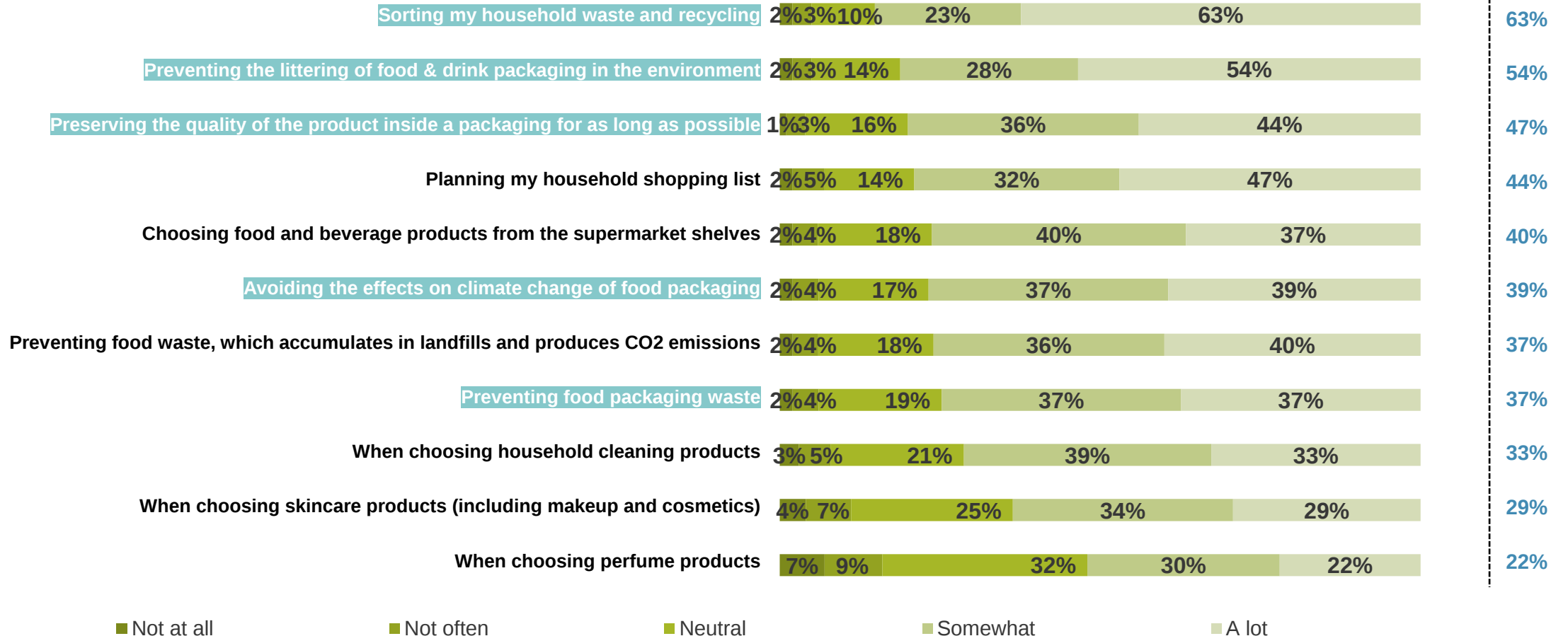
Q14: Sustainability can cover a wide range of behaviours, from environmental issues to social and economic factors. Below, we will present you with some topics related to sustainability. Please indicate how important each of these elements are to you in your everyday life - .N=4107

Sustainability acts in daily life

Almost two third of consumers report sorting household waste and recycling to contribute to sustainable practices, and half of consumers prevent littering, and prolong the life of the product inside packaging for as long as possible. It is interesting to note that behaviours towards sustainability also take place during the shopper journey, when choosing food & beverages.



T1B%
A lot

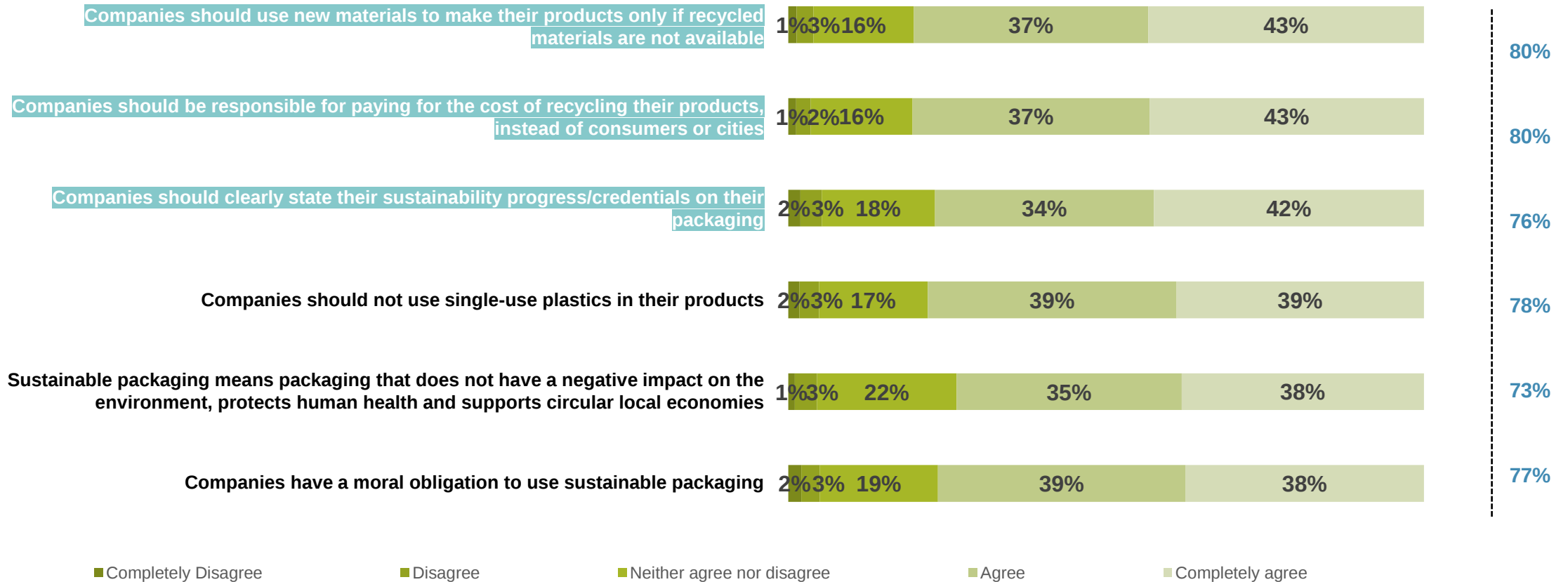


Defining sustainability and companies' responsibilities

8 out of 10 respondents consider that companies have a moral obligation to use sustainable packaging and should clearly have sustainability credentials on their packaging.



T2B%
Completely agree



Defining sustainability and companies' responsibilities *by country*

Consumers in Portugal, Spain, and Turkey higher results on almost all statements, while consumers in Switzerland and Czech Republic achieve significantly lower results on almost all statements



T2B%

(Completely) agree

														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Sustainable packaging means packaging that does not have a negative impact on the environment, protects human health and supports circular local economies	80%	84%	80%	74%	72%	88%	78%	74%	85%	80%	85%	81%	82%	87%
Companies have a moral obligation to use sustainable packaging	80%	83%	80%	81%	74%	85%	78%	75%	79%	70%	82%	90%	80%	84%
Companies should clearly state their sustainability progress/credentials on their packaging	78%	85%	79%	77%	71%	84%	70%	70%	73%	59%	85%	89%	75%	89%
Companies should not use single-use plastics in their products	77%	83%	75%	80%	70%	76%	77%	69%	72%	76%	78%	83%	81%	81%
Companies should use new materials to make their products only if recycled materials are not available	76%	78%	76%	80%	70%	77%	74%	66%	76%	71%	84%	79%	79%	86%
Companies should be responsible for paying for the cost of recycling their products, instead of consumers or cities	74%	75%	71%	76%	68%	78%	69%	64%	79%	66%	81%	77%	71%	82%

Sustainability credentials – applied to consumers' daily life

8 out of 10 consumers consider that brands have a responsibility towards sustainable and healthy packaging, believing it makes a difference for our planet.



- “ 75% to 82% agree **brands and governments** have a **responsibility towards healthy packaging** “
- “ 3 in 4 consumers find that purchasing **sustainable brands or products** makes a difference for our environment “
- “ 7 in 10 consumers **feel better** when they **buy sustainable brands or products** “
- “ 6 in 10 consumers agree that **packaged food or drink products** are **safe and free from chemicals** “
- “ 6 in 10 find **packaging claims and labels** that indicate a sustainable product are **valuable and understand what they mean** “
- “ **More than half of consumers** purchase brands/products because of their **sustainability practices** “
- “ **Half of consumers** pay more for **sustainable brands/products** “
- “ 40% to 46% believe that **packaging labels that indicate a sustainable product** are **misleading or purely marketing** “
- “ 4 in 10 consumers **avoid brands/products** because they have **researched the sustainability practices** of brands or because of **disagreement with brands' sustainability practices** “

Sustainability credentials – applied to consumers' daily life *by country*



T2B%

(Completely) agree

														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
It is the responsibility of brands to ensure that food packaging in stores is free from chemicals that could be harmful to my health	82%	87%	81%	81%	74%	86%	83%	77%	85%	78%	83%	89%	86%	89%
Purchasing sustainable brands or products makes a difference for our environment	76%	79%	75%	74%	70%	81%	73%	75%	76%	64%	83%	89%	71%	91%
It is the responsibility of governments to ensure that food packaging in stores is free from chemicals that could be harmful to my health	75%	85%	71%	69%	67%	85%	72%	64%	79%	69%	70%	82%	78%	85%
I feel better when I buy sustainable brands or products	68%	71%	68%	65%	58%	75%	63%	61%	72%	56%	73%	77%	62%	90%
If a packaged food or drink product is available on the market, I assume that it is safe to consume and free from chemicals that could be harmful to my health	62%	67%	67%	54%	58%	61%	56%	47%	55%	77%	65%	61%	67%	69%
I take into account packaging claims and labels that indicate a sustainable product	61%	64%	61%	62%	49%	73%	46%	48%	50%	52%	67%	64%	63%	88%
I understand what packaging labels that indicate a sustainable product mean	61%	62%	55%	58%	50%	72%	52%	50%	58%	53%	70%	72%	59%	85%
I have purchased brands/products specifically because of their sustainability practices	56%	62%	53%	70%	48%	66%	41%	45%	40%	43%	56%	54%	36%	83%
I am happy to pay more for sustainable brands/products	47%	50%	45%	46%	41%	52%	37%	40%	46%	40%	54%	45%	42%	77%
I find packaging labels that indicate a sustainable product purely marketing	46%	54%	46%	54%	43%	44%	34%	35%	55%	39%	48%	34%	41%	51%
I have avoided brands/products because I disagreed with their sustainability practices	45%	54%	42%	54%	44%	49%	41%	30%	37%	33%	44%	55%	30%	45%
I have researched brands to ensure they do what they say they will do when it comes to sustainability	42%	47%	39%	43%	38%	49%	30%	25%	34%	25%	51%	42%	41%	82%
I find packaging labels that indicate a sustainable product misleading	40%	53%	45%	50%	35%	40%	23%	30%	46%	33%	35%	29%	34%	38%

Q17: Now thinking about yourself, to what extent do you agree with the following statements? - N=4107

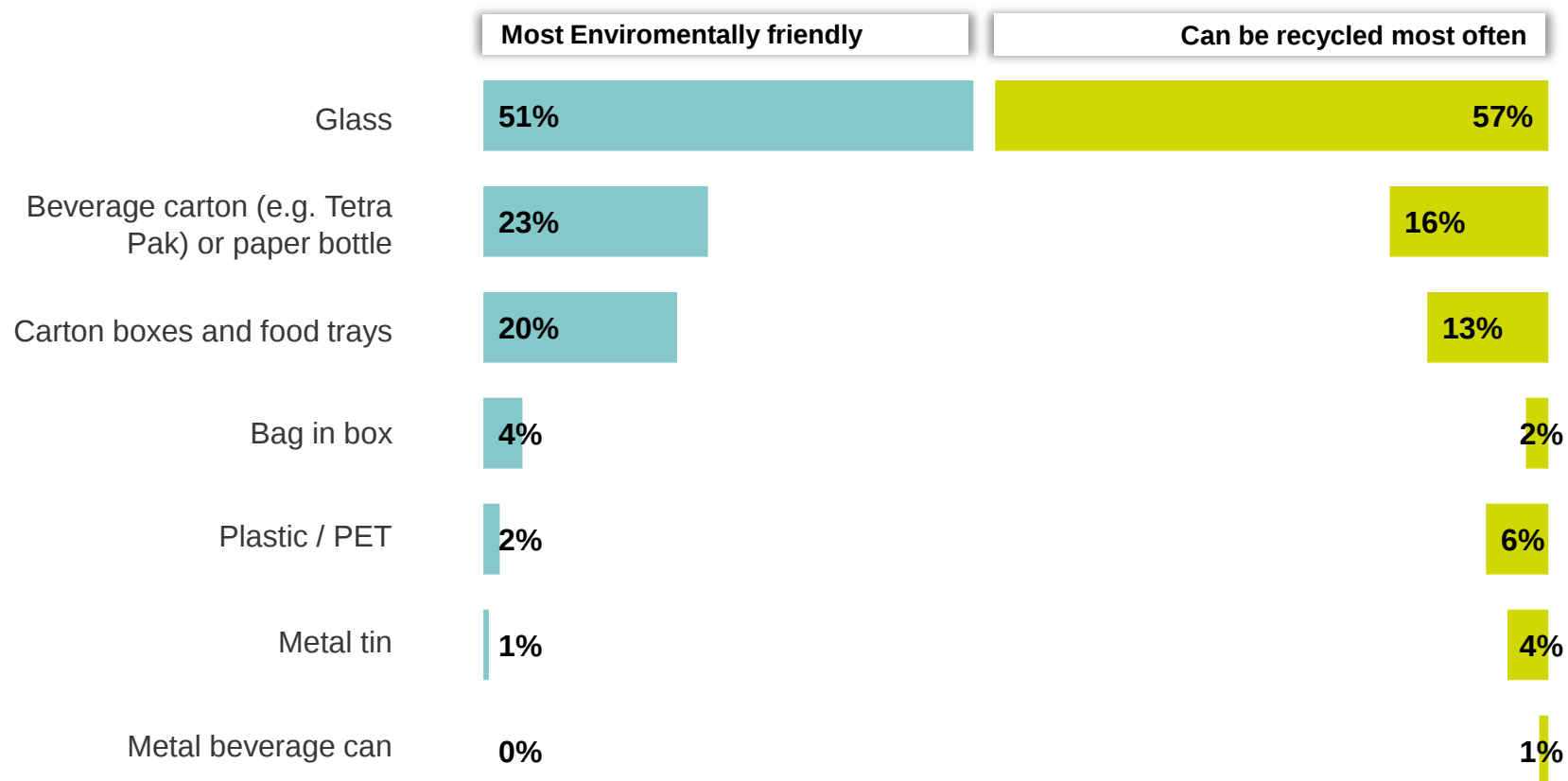
Significantly **higher** / **lower** Country vs. Global

Zoom in on Portugal

Portuguese consumers rank glass by far as the most environmentally friendly and the easiest recycled product.



Most recyclable packaging material



HEALTH & PRODUCT PRESERVATION



InSite Consulting



KEY CONCLUSIONS

Glass is seen as a safe and healthy packaging material, especially in the context of recycled material

- **A third of consumers** agree that glass as a packaging material helps to **prevent several sustainability and health-related issues**.
- Glass is even seen as the best material for **preventing effects on climate change**.
- When recycled, glass is seen as the safest material. As such, **glass offers the best of both worlds**.



Results of glass in ranking best packaging solution

One third of respondents consider that glass is the best packaging solution to prevent health and ecological hazards.

Consumers in Portugal rank glass highest, while Czech consumers have a significantly lower association. Glass as a solution against climate change is particularly scoring highly in Turkey, Slovakia, Portugal and Austria.

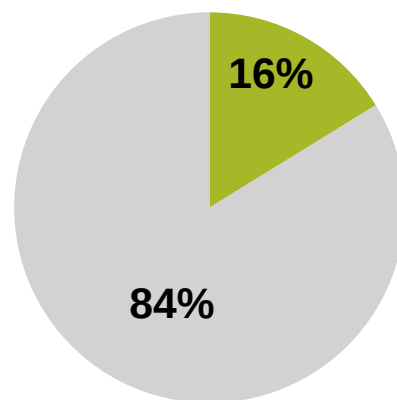


Association with Glass														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Transfer of harmful chemicals from the packaging into a food or drink product	35%	33%	38%	33%	37%	37%	38%	33%	40%	25%	27%	40%	30%	28%
The loss of product quality after a short while	30%	30%	29%	35%	34%	31%	35%	25%	32%	15%	25%	39%	22%	22%
Littering of food containers in the environment (e.g. ocean, landscapes), which then leach harmful chemicals and microorganisms into human or animal health	34%	34%	32%	34%	33%	36%	38%	32%	32%	31%	30%	38%	28%	34%
Food packaging waste, which accumulates in landfills and produces CO2 emissions	32%	35%	32%	33%	35%	34%	36%	26%	31%	25%	27%	37%	24%	33%
Food waste, which accumulates in landfills and produces CO2 emissions	32%	33%	32%	32%	32%	36%	37%	27%	29%	17%	28%	39%	24%	32%
Effects on climate change of food packaging (e.g. production, reusability and recyclability)	44%	38%	38%	42%	45%	43%	52%	39%	54%	43%	47%	52%	44%	57%
AVERAGE	35%	34%	34%	35%	36%	36%	39%	30%	36%	26%	31%	41%	29%	34%

Significantly higher / lower Country vs. Global

Q20: Which of the following packaging solutions do you think best helps to prevent the following issues? - N=666

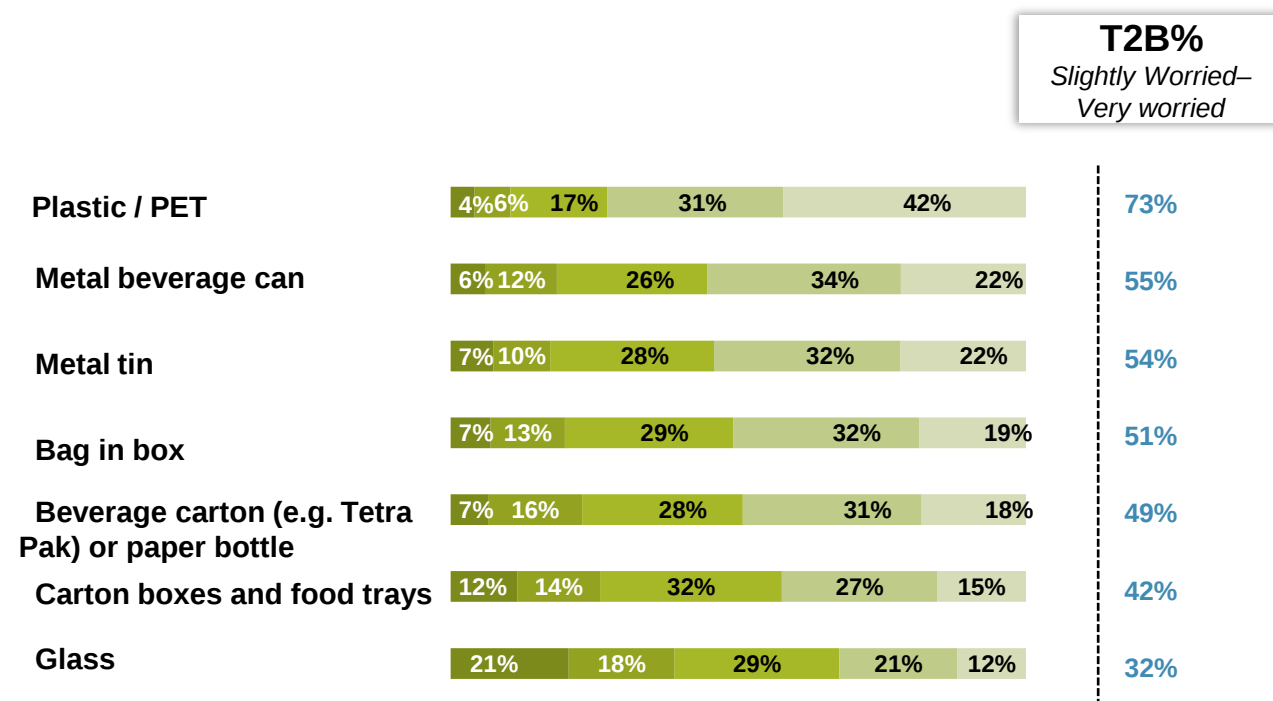
16% of Europeans consider packaging produced with recycled material a danger for public health



Q18: Do you consider that packaging produced with recycled material is a danger for public health? - N=4107

Recycled Plastic is much more concerning than glass

7 out of 10 Europeans are worried about the health hazards of recycled Plastic/PET. Only 3 out of 10 Europeans are worried about the potential health hazards of recycled glass.



Q19 Which packaging materials are you particularly concerned about in this respect?- N=666

Concerns of recycled packaging material *by country*

Consumers in France, Germany and Turkey consider recycled packaging material more dangerous than the European average. Glass is seen as relatively safe across all markets.



T2B%
(Very) worried

														
	Total	N=62	N=93	N=109	N=100	N=58	N=30	N=36	N=26	N=31	N=18	N=17	N=40	N=48
% considering recycled packaging dangerous	16%	12%	19%	22%	20%	12%	15%	18%	13%	15%	9%	8%	20%	24%
Plastic / PET	73%	72%	74%	68%	73%	71%	64%	54%	89%	72%	83%	75%	79%	87%
Metal beverage can	55%	64%	51%	59%	44%	57%	47%	51%	63%	50%	63%	75%	54%	66%
Metal tin	54%	63%	53%	59%	45%	62%	37%	41%	54%	43%	57%	69%	54%	67%
Bag in box	51%	48%	55%	68%	39%	56%	36%	50%	55%	44%	44%	40%	35%	57%
Beverage carton (e.g. Tetra Pak) or paper bottle	49%	47%	53%	56%	41%	55%	43%	50%	44%	35%	40%	34%	53%	59%
Carton boxes and food trays	42%	40%	54%	52%	38%	42%	40%	33%	30%	38%	29%	40%	26%	51%
Glass	32%	43%	34%	37%	28%	29%	35%	29%	37%	30%	17%	30%	32%	27%

Significantly **higher** / **lower** Country vs. Global

Q19 Which packaging materials are you particularly concerned about in this respect? - N=666

Low Sample size

ATTITUDES TO REUSE & RECYCLING



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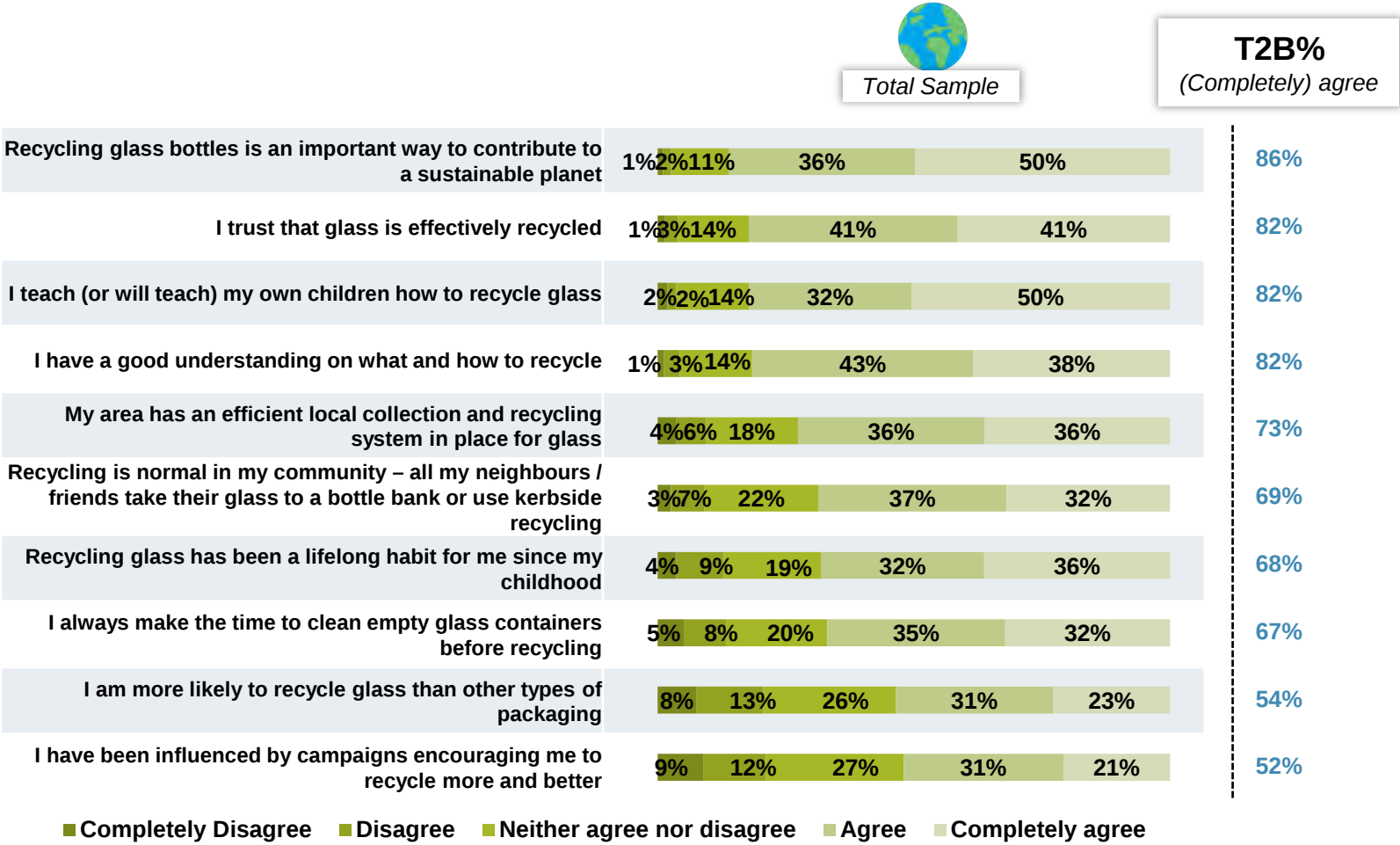
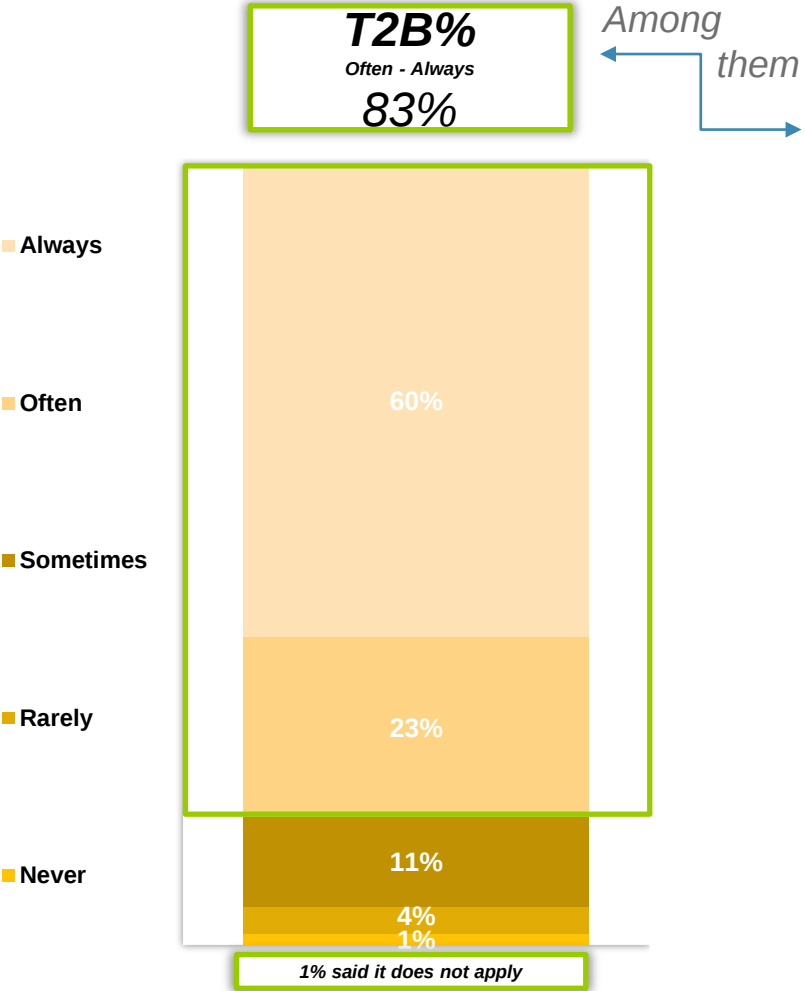
KEY CONCLUSIONS

Consumers tend to recycle glass packaging. A DRS system is not necessarily preferred

- **8 out of 10** respondents **always or often recycle** glass packaging.
- Recycling is seen as key to live more **sustainable** and consumers **generally know how to do it**. Most areas also have an **efficient local collection and recycling system in place**.
- Main reason not to recycle is a **lack of convenient systems**, especially in Spain
- **8 out of 10 consumers** also believe that **glass is effectively recycled**.
- Data from the UK and Germany highlights an **interesting perception gap**: consumers generally believe that glass gets recycled (79%/78%), but are less confident that this is the case for packaging in general (22%/20%; but based on low sample)
- **Recycling glass** is seen as **easy** by almost two third of consumers.
- Only **1 out of 4 consumers** would be willing to engage in a DRS system and 1 in 5 would pay a deposit on top of packaging.



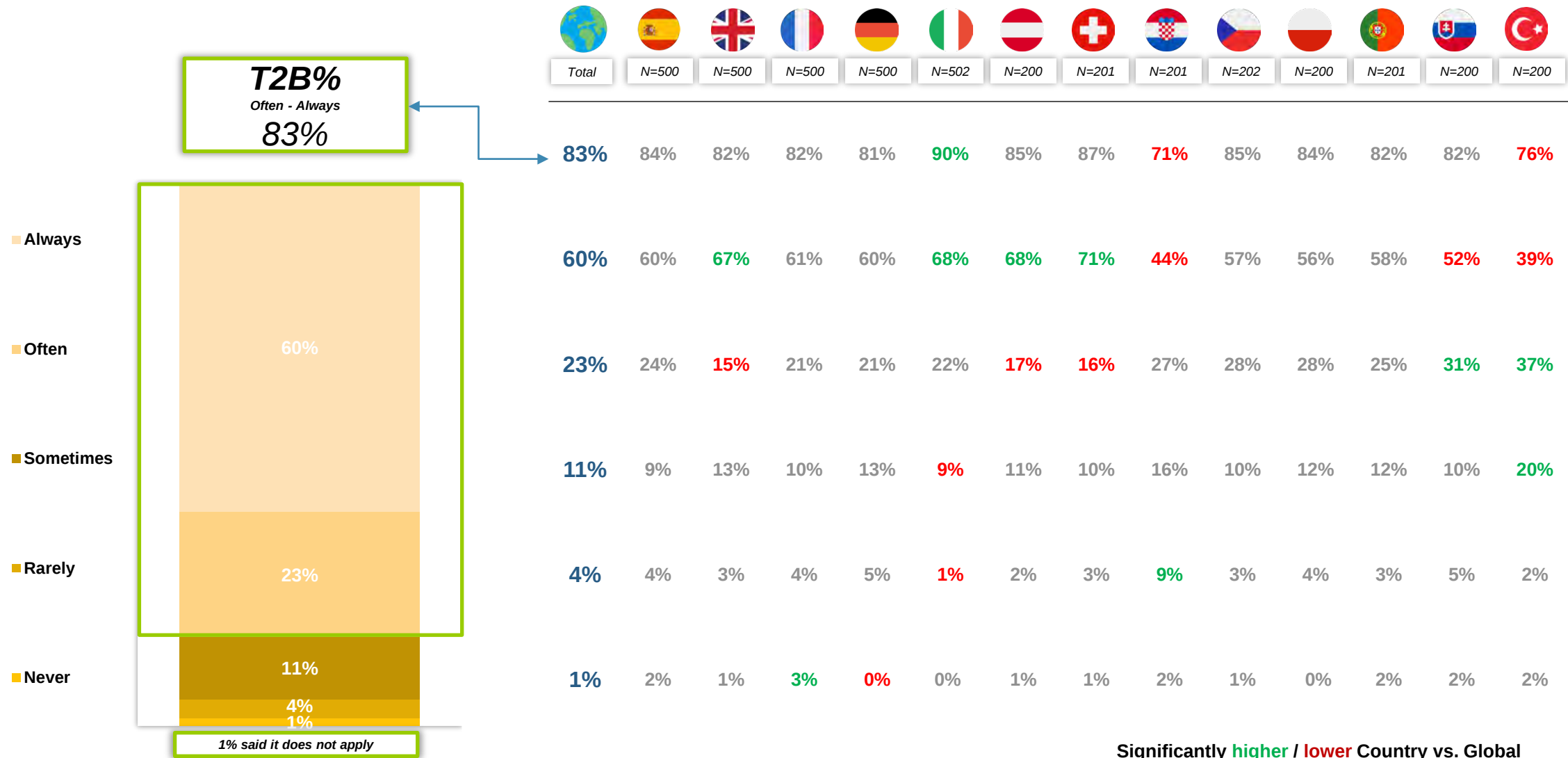
8 out of 10 consumers recycle glass packaging once they have finished using it
In Italy 9 out of 10 consumers recycle their glass packaging after using it, and only 7 out of 10 do so in Croatia.



Q22: How often do you recycle your glass packaging once you're finished using it? By recycling glass packaging, we mean collecting and disposing glass for recycling (e.g. in a bottle bank or via kerbside collection). - N=4107

8 out of 10 consumers recycle glass packaging once they have finished using it

In Italy 9 out of 10 consumers recycle their glass packaging after using it, and only 7 out of 10 do so in Croatia.



Q22: How often do you recycle your glass packaging once you're finished using it? By recycling glass packaging, we mean collecting and disposing glass for recycling (e.g. in a bottle bank or via kerbside collection). - N=4107

Recycling is seen as important and is a trusted process.

Almost 9 out of 10 consumers agree with the fact that recycling glass is important to a more sustainable planet. Consumers also believe they understand well *what* and *how* to recycle and trust that glass is effectively recycled. This importance of recycling is emphasized by the fact that they would also teach it to their children.



83%

Are likely (always/often) to recycle glass packaging

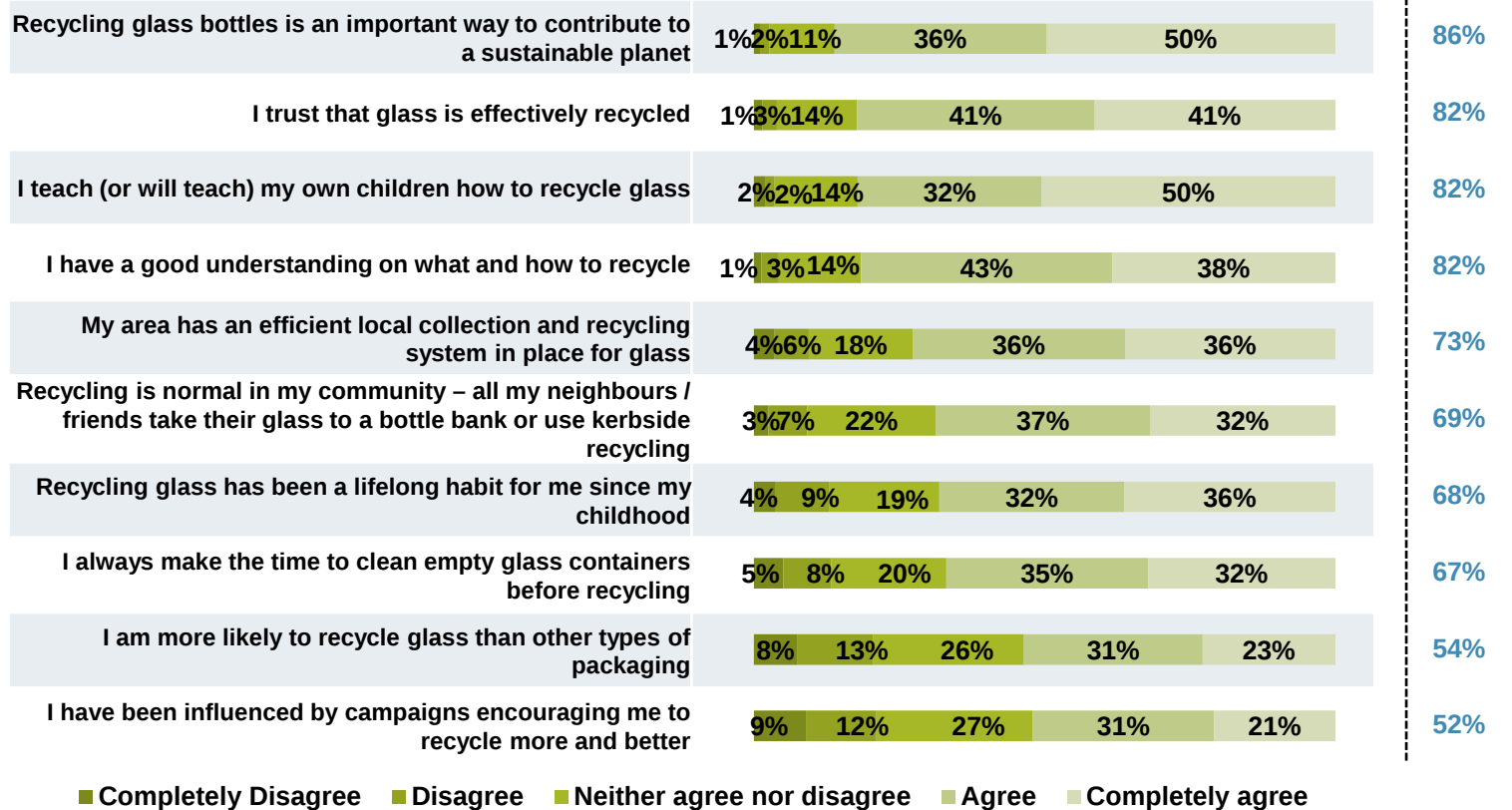
Among them



Total Sample

T2B%

(Completely) agree



Q24: You indicated that you are likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements? - N=3871

Recycling glass packaging by country

Importance of recycling is evaluated as somewhat higher in Spain, Portugal and Turkey



T2B%

(Completely) agree



Recycling glass bottles is an important way to contribute to a sustainable planet	86%	91%	85%	85%	78%	88%	83%	86%	86%	85%	90%	91%	83%	91%
I trust that glass is effectively recycled	82%	88%	79%	82%	78%	80%	86%	83%	75%	88%	86%	84%	82%	86%
I teach (or will teach) my own children how to recycle glass	82%	85%	68%	84%	77%	86%	84%	81%	88%	84%	91%	89%	77%	89%
I have a good understanding on what and how to recycle	82%	84%	82%	83%	73%	86%	80%	81%	86%	75%	88%	80%	76%	83%
My area has an efficient local collection and recycling system in place for glass	73%	77%	74%	67%	72%	79%	79%	78%	50%	75%	62%	76%	69%	75%
Recycling is normal in my community – all my neighbours / friends take their glass to a bottle bank or use kerbside recycling	69%	61%	74%	68%	70%	77%	74%	74%	55%	69%	73%	55%	66%	64%
Recycling glass has been a lifelong habit for me since my childhood	68%	70%	60%	74%	72%	71%	70%	78%	62%	62%	61%	58%	63%	73%
I always make the time to clean empty glass containers before recycling	67%	54%	77%	83%	52%	74%	64%	63%	72%	62%	71%	47%	63%	77%
I am more likely to recycle glass than other types of packaging	54%	56%	51%	57%	47%	60%	47%	44%	47%	47%	63%	45%	40%	86%
I have been influenced by campaigns encouraging me to recycle more and better	52%	66%	51%	52%	35%	61%	38%	28%	45%	39%	60%	61%	46%	84%
AVERAGE	35%	34%	34%	35%	36%	36%	39%	30%	36%	26%	31%	41%	29%	34%

Significantly **higher** / **lower** Country vs. Global

Q24: You indicated that you are likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements?- N=3871

Only 5% of consumers are not likely to recycle glass packaging

4 out of 10 respondents who are not likely to recycle, report it is due to logistical reasons, such as convenience recycling facilities, or bottle banks. This is especially true for Portugal and Switzerland where almost 8 out of 10 respondents lack convenient recycling facilities near their homes.



5%

Are not likely (never/rarely) to recycle glass packaging

Among them



Total Sample

I don't have a convenient place near my home to be able to recycle	38%
There are no conveniently located bottle banks where I live	32%
There is no (frequent) kerbside collection of glass where I live	27%
It takes a lot of time to separate the waste	15%
I don't want to worry about cleaning the glass containers	13%
I don't get penalised if I don't contribute to recycling	13%
I don't have clear guidelines on how to recycle	12%
I don't see recycling as something useful	8%
Other	12%

Recycling glass packaging *by country*

Consumers in the UK showed significantly higher results when it comes to agreeing with con-recycling claims.



I don't have a convenient place near my home to be able to recycle	38%	19%	58%	37%	37%	38%	16%	27%	41%	34%	13%	80%	45%	35%
There are no conveniently located bottle banks where I live	32%	25%	57%	31%	11%	38%	31%	77%	31%	24%	27%	22%	43%	45%
There is no (frequent) kerbside collection of glass where I live	27%	15%	51%	28%	26%	20%	43%	7%	17%	28%	45%	0%	33%	46%
It takes a lot of time to separate the waste	15%	26%	0%	6%	33%	44%	0%	21%	4%	19%	0%	10%	7%	34%
I don't want to worry about cleaning the glass containers	13%	10%	18%	10%	17%	0%	17%	7%	8%	25%	24%	0%	21%	21%
I don't get penalised if I don't contribute to recycling	13%	7%	4%	6%	29%	20%	13%	39%	12%	27%	11%	0%	14%	9%
I don't have clear guidelines on how to recycle	12%	6%	17%	17%	24%	18%	25%	0%	4%	6%	15%	0%	0%	26%
I don't see recycling as something useful	8%	15%	13%	12%	0%	0%	14%	7%	14%	0%	0%	10%	0%	0%
Other	12%	23%	4%	12%	4%	0%	14%	10%	20%	23%	0%	0%	24%	0%

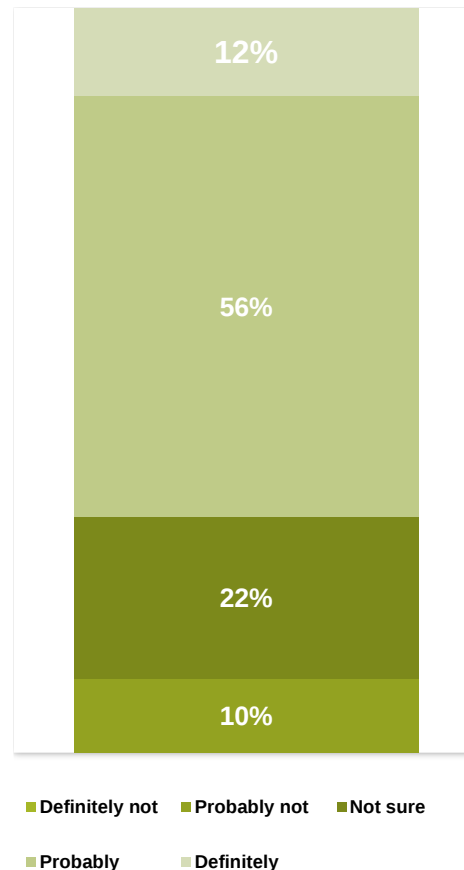
Significantly **higher** / **lower** Country vs. Global

Q23: You indicated that you are not likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements? - N=202

Zoom in on Croatia & Poland



Almost 7 out of 10 of consumers in Croatia state that they would be inclined to recycle if the bottles were processed and turned into new bottles and jars

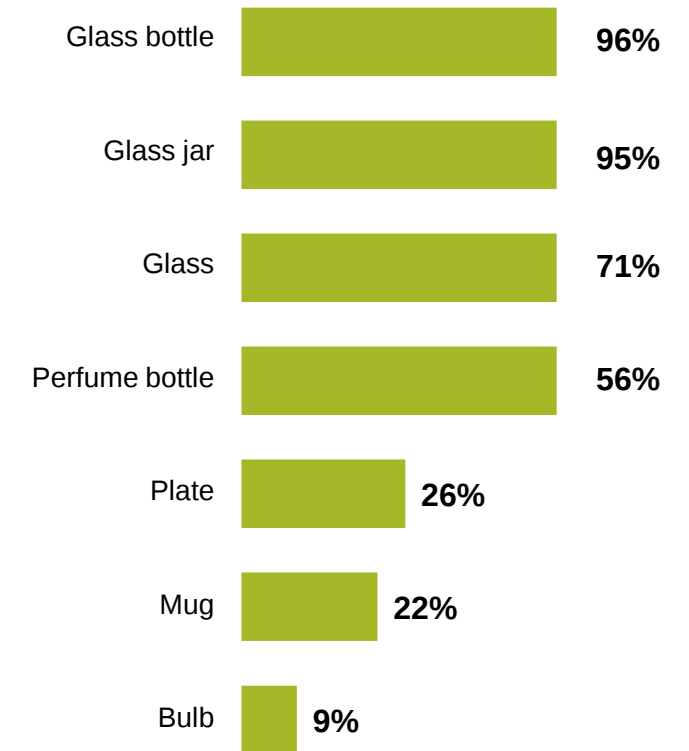


Q26: To what extent would you be inclined to recycle if the bottles you recycle would be processed and turned into new bottles and jars in Croatia? - N=23

Low Sample size



Consumers in Poland mostly recycle glass bottles and jars in bottle banks.



Q25: What do you put into the bottle bank? - N=200

DESIGN & BRANDING OF GLASS PACKAGING



InSite Consulting



Brands with the most distinctive glass packaging



InSites Consulting



Q38 :With regards to products with distinctive glass packaging, which brands come to mind first? - N=4107

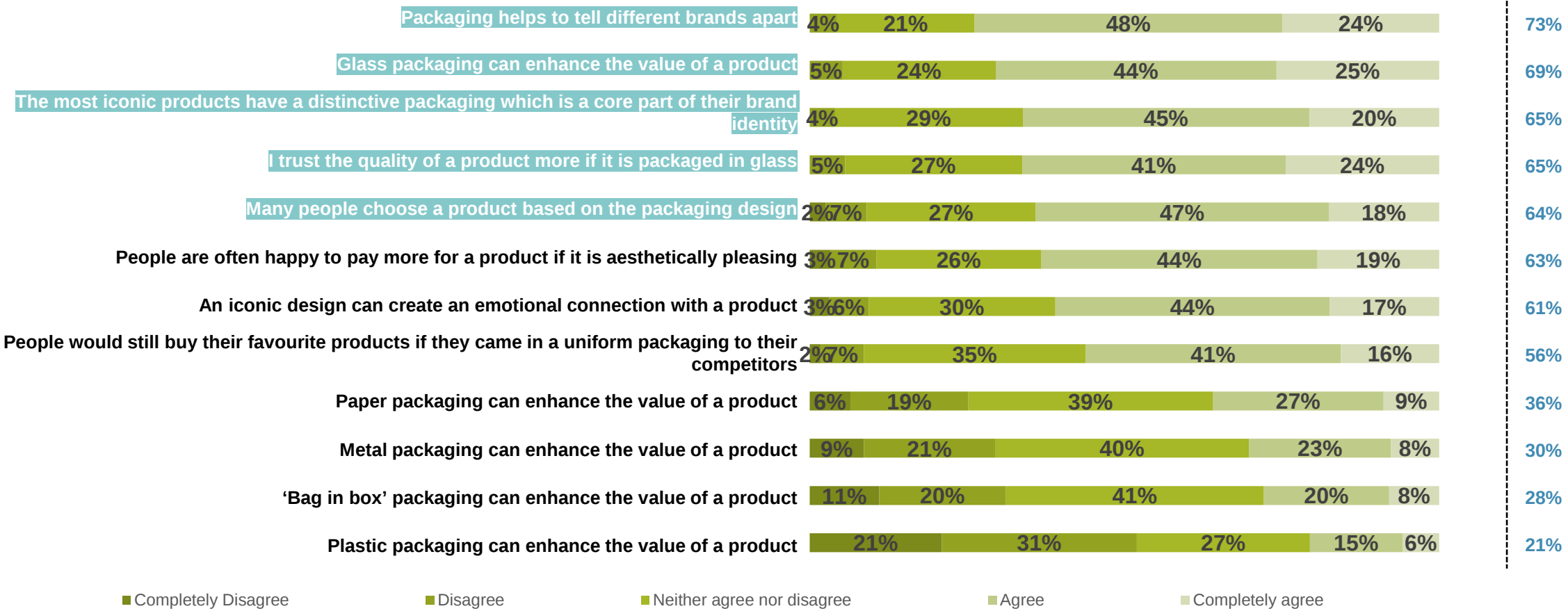
*The bigger the pack, the more times this brand was mentioned

7 out of 10 consumers report that packaging plays a crucial role in telling brands apart and enhances the value of a product



Glass packaging in particular can help to enhance the value of a product and people trust the quality of products more when packaged in glass.

T2B%
(Completely) agree



Spanish, Polish and Turkish consumers show the highest appreciation of glass packaging

In contrast, Austria, Switzerland and Germany achieve significantly lower results than the global average on lost claims.



T2B% <i>(Completely) agree</i>															
		Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Packaging helps to tell different brands apart	73%	75%	74%	69%	63%	75%	66%	64%	79%	74%	77%	78%	80%	82%	
Glass packaging can enhance the value of a product	69%	75%	63%	73%	58%	71%	58%	63%	69%	66%	80%	58%	77%	89%	
The most iconic products have a distinctive packaging which is a core part of their brand identity	65%	69%	68%	65%	48%	69%	48%	52%	75%	64%	75%	69%	67%	79%	
I trust the quality of a product more if it is packaged in glass	65%	69%	56%	65%	50%	70%	56%	56%	70%	68%	75%	67%	65%	92%	
Many people choose a product based on the packaging design	64%	71%	61%	57%	55%	66%	55%	54%	76%	69%	70%	66%	69%	78%	
People are often happy to pay more for a product if it is aesthetically pleasing	63%	64%	61%	64%	56%	63%	57%	56%	76%	65%	78%	47%	69%	79%	
An iconic design can create an emotional connection with a product	61%	68%	65%	53%	45%	67%	44%	50%	66%	60%	70%	72%	69%	74%	
People would still buy their favourite products if they came in a uniform packaging to their competitors	56%	59%	54%	64%	49%	61%	49%	46%	55%	52%	59%	46%	56%	68%	
Paper packaging can enhance the value of a product	36%	38%	38%	40%	35%	40%	29%	24%	30%	30%	46%	21%	26%	49%	
Metal packaging can enhance the value of a product	30%	30%	34%	34%	27%	31%	19%	23%	29%	31%	30%	26%	28%	42%	
'Bag in box' packaging can enhance the value of a product	28%	37%	26%	26%	25%	28%	17%	21%	25%	22%	35%	32%	23%	40%	
Plastic packaging can enhance the value of a product	21%	24%	21%	24%	21%	20%	13%	18%	17%	16%	16%	24%	18%	24%	

Significantly **higher** / **lower** Country vs. Global

Brands with the most distinctive glass packaging per country



Coca-Cola,
Mahou, Estrella Galicia,
La Casera



Coca-Cola,
Landliebe, Vöslauer,
Efko, Römerquelle



Coca-Cola,
Zlatý Bažant, Budiš



Coca-Cola, Heinz,
Dolmio, Marmite



Coca-Cola, Nutella,
Barilla



Coca-Cola,
Mattoni, Olma, Hame



Coca-Cola,
Nutella, Bonne Maman,
Andros, Panzani



Coca-Cola,
Mutti, **Nutella,**
Barilla, Cirio



Coca-Cola,
Pepsi, Pudliszki,
Łowicz, Lech



Coca-Cola,
Compal, Super Bock,
Sagres



Nutella,
Landliebe,
Coca-Cola, Kühne



Jamnica,
Coca-Cola,
Podravka, Maraska

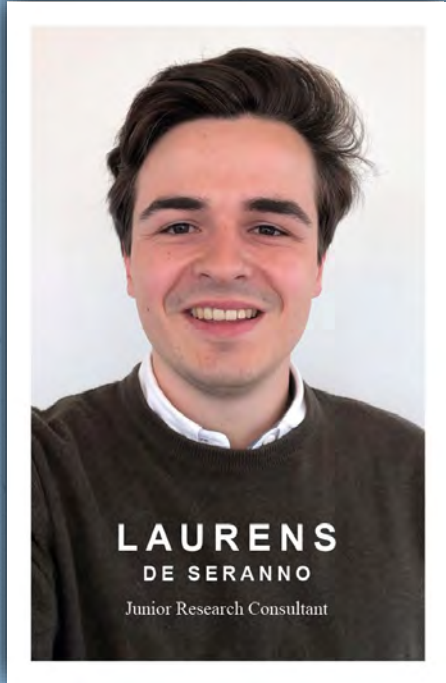


Pinar,
Coca-Cola, Erikli,
Tamek

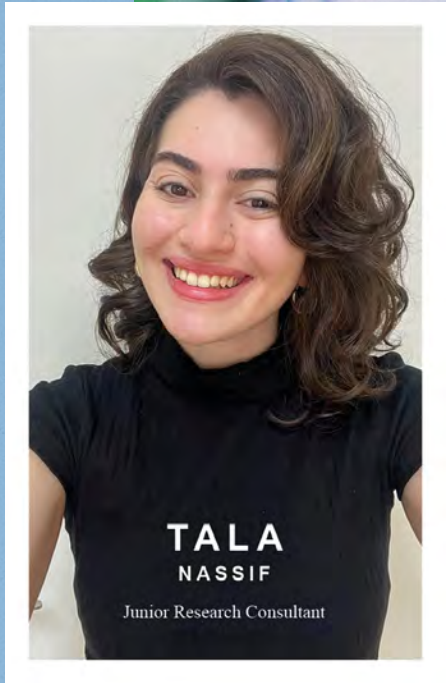
LET'S *talk!*



SimonQ@insites.eu



Laurens@insites.eu



Tala@insites.eu





InSites Consulting



APPENDIX





COUNTRY DASHBOARD

EU



Glass Consumption

28%

Buy more glass compared to 3 years ago

79%

Agree that glass is a material for the future

Top 5 Drivers for glass

It can be recycled more effectively than other packaging materials	50%
It causes less packaging waste	43%
It causes less littering of packaging into the environment	41%
Disposing and collecting glass for recycling is convenient	39%
It's better at preserving your health than other materials	35%



Reuse & Recycling

60% Finds **Recycling** important

44% Finds **Circular Economy** important

83% **Recycles** glass packaging

9% Finds Recycling **difficult**

43% Prefers Bottle Banks



Importance for branding

69% Believes glass packaging can **enhance the value** of a product

65% **Trust the quality** of a product more when packaged in glass



Health preservation

34% Believes Glass can help prevent **health and ecological** hazards

16% Considers packaging with **recycled material** a **health danger**

73% Are concerned about **Plastic/PET**