

Exclusive findings of a major European survey¹ commissioned by ALL4PACK Paris and conducted by ObSoCo.

EUROPEANS AND THE PACKAGING EXPERIENCE: THEIR EXPECTATIONS

With 4 months to go before its opening, ALL4PACK Paris – the leading tradeshow for the EMEA zone in the packaging and intralogistics markets – publishes the findings of an exclusive survey into the “packaging experience” of European consumers.

Conducted with the support of ObSoCo² in four countries (Germany, Spain, France and Italy), this survey reveals in particular that expectations with regard to packaging, whether in terms of shape, the emotional impact it creates or the information it bears, vary according to the country examined.

Another finding is that a generation effect also appears to affect consumers’ attitudes to packaging, most notably as regards innovation and reducing the environmental footprint.

COUNTRY-SPECIFIC EXPECTATIONS

While there appears to be some form of consensus on some points examined, the survey highlights the **influence of cultural traits** in its results. A certain disparity can thus be observed between the French and Germans on the one hand, who seem to have a more **functional approach to packaging**, and the Italians and Spanish on the other, who are more sensitive to **how packaging looks and acts on emotions**.

- **Useful packaging for the French, eco-friendly for the Germans**

The survey reveals that while the **French** are more sceptical about innovation and the packaging “experience”, greater numbers consider packaging to be a **source of useful information**, to help them buy the “**right quantity**”. The French have a chiefly “**utilitarian**” **approach to packaging** in which economic considerations are central.

- **32%** of the French see packaging mainly as “a source of useful information about products”.
- **18%** consider packaging as something that helps them “buy the right quantity”.

As for the **Germans**, a greater proportion of them say they prefer **packaging which reduces environmental impact**, whether as lightweight packaging to reduce the volume of waste or as packaging which can be given a second life. According to the data collected, **German consumers appear to be more sensitive to the environmental impact of packaging**, whether in its design or its recycling.

¹ European survey conducted on behalf of the trade show ALL4PACK Paris – COMEXPOSIUM Group, by ObSoCo on a sample of 2,186 people, evenly weighted across the four countries studied (France, Germany, Italy and Spain) – Online field survey from 11 to 24 May 2016

² Founded in 2011 by Robert Rochefort, Philippe Moati and Nathalie Damery, the *Observatoire Société et Consommation* (ObSoCo – Society and Consumption Observatory) is a market research and strategic consulting firm.

- **33%** of Germans say they prefer “lightweight packaging” which, when used in e-commerce, reduces the volume of waste.
- **29%** of Germans say that packaging should be “recyclable” or “reusable”.

- **“Aspirational” packaging for the Italians and Spaniards**

Italian and Spanish consumers are considerably more sensitive than French and Germans to the “experiences” offered by some forms of packaging. Overall, they are more optimistic with regard to innovation and the development of **connected and customised packaging** which constitute a “genuine advance” for more than two thirds of them.

- **75%** of Spaniards and **66%** of Italians consider connected packaging as “a genuine advance”.
- On a scale of 0 to 10, the Spanish give **6.5** points to the “wow” effect of customised packaging, and the Italians give **5.1**. The average mark for the “wow” effect across the entire sample is a mere 4.8.

IDEAL PACKAGING FOR EACH GENERATION

A **generation effect** also appears to influence consumers’ attitudes to packaging, most notably as regards innovation and reducing the environmental footprint. **Two generation categories point to specific expectations** in this survey.

- **“Light and connected” for the 18-24 age range**

In the four countries studied, **the younger respondents are unsurprisingly the biggest fans of connected packaging** which they consider as a source of progress for health, product safety and reduction in environmental impact **This category of the population is a segment for which innovating in packaging is essential!**

- **71%** of the 18-24 age range think that connected packaging constitutes a “genuine advance” (compared with 57% across the sample).
- **36%** of the 18-24 age range say that in e-commerce they prefer to see packaging that is “light so as to reduce volumes of packaging-related waste” (as against 28% across the sample).

- **“Robust and reusable” for the 55-70 age group**

The older respondents in the sample are **more interested in packaging which ensures that the product is well-protected**, as more than two thirds of them cite this as the number one property. Furthermore, the 55-70 age range is more likely to prefer e-commerce packaging which can be reused or recycled. **The ideal form of packaging** for this generation appears to be sustainable, made from materials which provide robustness and protection of contents and which might be reused or recycled at the end of its life.

- **37%** of respondents aged 55-70 think that packaging is above all “a guarantee of product protection”.
- **32%** of the 55-70 age range say that in online shopping they prefer packaging “which can be reused or recycled”.

ABOUT THE SURVEY

This survey, conducted by ObSoCo on behalf of ALL4PACK Paris, aimed to **gain insight into the “packaging experience” of European consumers, in both its functional and emotional aspects**. The survey was conducted in May 2016 on consumers in **4 key countries**: Germany, Spain, France and Italy, reflecting European consumer trends.

Five main attributes of packaging were examined:

- the development of connected and smart packaging,
- packaging in online shopping,
- information displayed on packaging,

- the “wow” effect associated with limited edition or customised packaging,
- the main properties of packaging.

6 main findings emerged:

- The majority of respondents approve of the development of connected and smart packaging;
- In the area of e-commerce, two seemingly contradictory expectations emerge, with robust packaging to protect products on the one hand, and lightweight packaging to reduce the volume of waste on the other;
- Also on the subject of e-commerce, more than half of the respondents rank the reduction in environmental footprint as the main criterion;
- With regard to information displayed on packaging, expectations converge around the manufacturing process;
- As regards limited edition or customised packaging, there is a strong divergence between the French and Germans on one side and the Italians and Spaniards on the other;
- With regard to the main function of packaging, consensus appears between the four countries regarding the guarantee of protection.

Read the comprehensive findings from the survey at

<https://www.all4pack.com/press/ALL4PACK-Paris-2016-survey>

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All media releases, kits and visuals are available in the Press section of the ALL4PACK Paris web site. For direct access, click [here](#).

KEY FIGURES

- *The trade shows EMBALLAGE & MANUTENTION become ALL4PACK Paris*
- *14 - 17 November 2016, Paris Nord Villepinte, France, Halls 5a, 6 and 7*
- *1,600 exhibitors and brands represented from the Packaging, Processing, Printing & Handling sectors, including 50% from outside France*
- *Expected visitor attendance of 98,000 professionals, including 35% from abroad*
- *100 countries represented*

The COMEXPOSIUM Group, one of the world leaders in event organisation, is involved in **more than 170 consumer and trade events**, covering **11 different sectors of activity** such as food, agriculture, fashion, homeland security, construction, high-tech, optics and transport. COMEXPOSIUM hosts **45,000 exhibitors** and more than **3 million visitors** in **26 countries around the world**. Comexposium is developing worldwide through its activities in around thirty countries: Algeria, Argentina, Belgium, Brazil, Canada, China, Germany, India, Indonesia, Italy, Japan, Korea, Monaco, the Netherlands, New Zealand, the Philippines, Qatar, Russia, Singapore, Spain, Thailand, Turkey, the United Arab Emirates, the United Kingdom and the United States.