

A man and a woman are sitting at a table in a modern kitchen setting. The woman, on the left, has long blonde hair and is wearing a grey turtleneck sweater. She is smiling and looking down at a tablet computer. The man, on the right, has short blonde hair and is wearing a grey cable-knit sweater. He is also smiling and looking at the tablet. On the table in front of them are several food and drink packages: a yellow pouch, a red pouch, a yellow carton, and a yellow carton with the brand name 'KOOKIN' visible. In the background, there is a white decorative wall sculpture and a fireplace with a fire burning.

**Consumer value for packaging and future applications**

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**Package Testing & Research / Sense N Insight**

**Erasmus+ SusPack 2022**



## most critical touchpoints with consumers

### SHELF VISIBILITY

Does the package stand out in store?

### USER EXPERIENCE

What kind of strengths and weaknesses does the packaging have compared to other brands?

### PACKAGE LABELLING

Is the label information correct and can consumers find the most important information easily?



## Content

### 1. CONSUMER VALUE FOR PACKAGING

What do future consumers value in packaging?

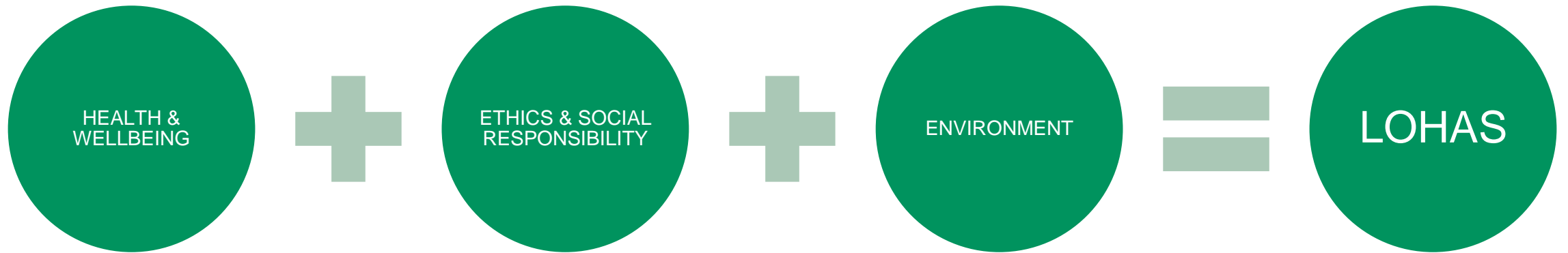
### 2. CONSUMER VALUE FOR FUTURE APPLICATIONS

What kind of value can the new packaging applications offer to consumers?

# 1. Consumer value for packaging

# **Finnish LOHAS study in 2011-2020**

# Lifestyles of Health and Sustainability



# LOHAS groups

## Lohas heavy

Express high concerns for environmental problems at global level.

Strong interest in social responsibility, aesthetics, and ecological and ethical products.

Active in social media.

## Lohas medium

Interested in climate change and nature conservation.

Prefer eco-friendly products.

## Lohas light

Express interest towards LOHAS values, but have not yet applied them to their consumption behaviour.

## Not interested

Show no interest in LOHAS values, but do not feel uncomfortable with such selling points.

## Anti-Lohas

Are unmotivated by LOHAS argumentation and unwilling to buy products aimed at this market.

# Survey data

<b>date</b>	<b>sample size</b>	<b>online panel</b>
February 2020	N=1000 (2020)	M3 Panel
February 2014	N=1000 (2014)	
September 2011	N=1967 (2011)	
	representative of the Finnish mainland population	

# Demographics 2020

## gender

male	50.0 %
female	49.9 %
other	0.01 %

## age

18 - 24	12%
25 - 34	18%
35 - 44	17%
45 - 54	18%
55 - 64	19%
65 - 75	16%

## household type

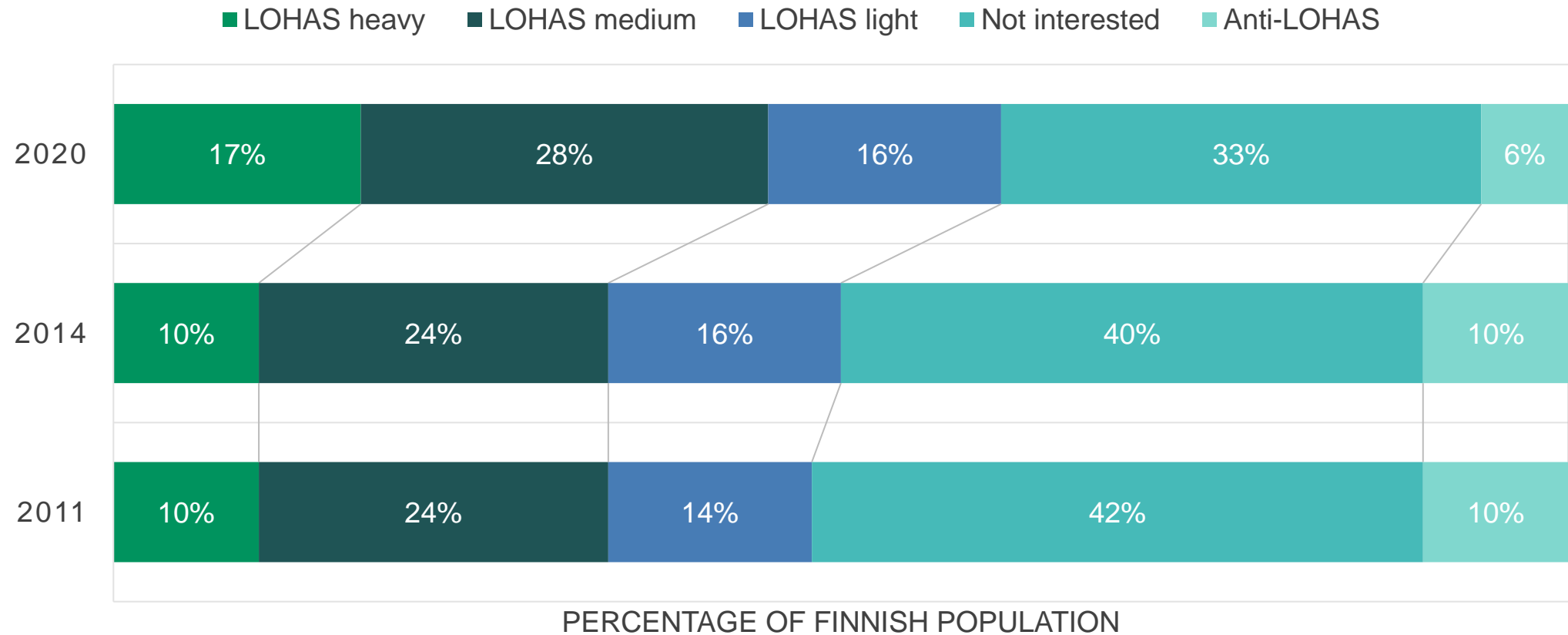
one person	35%
couple, no children	34%
family with children	25%
adult household	6%

## education level

primary	11%
vocational	52%
bachelor's	23%
master's	14%

# Finnish LOHAS groups in 2011-2020

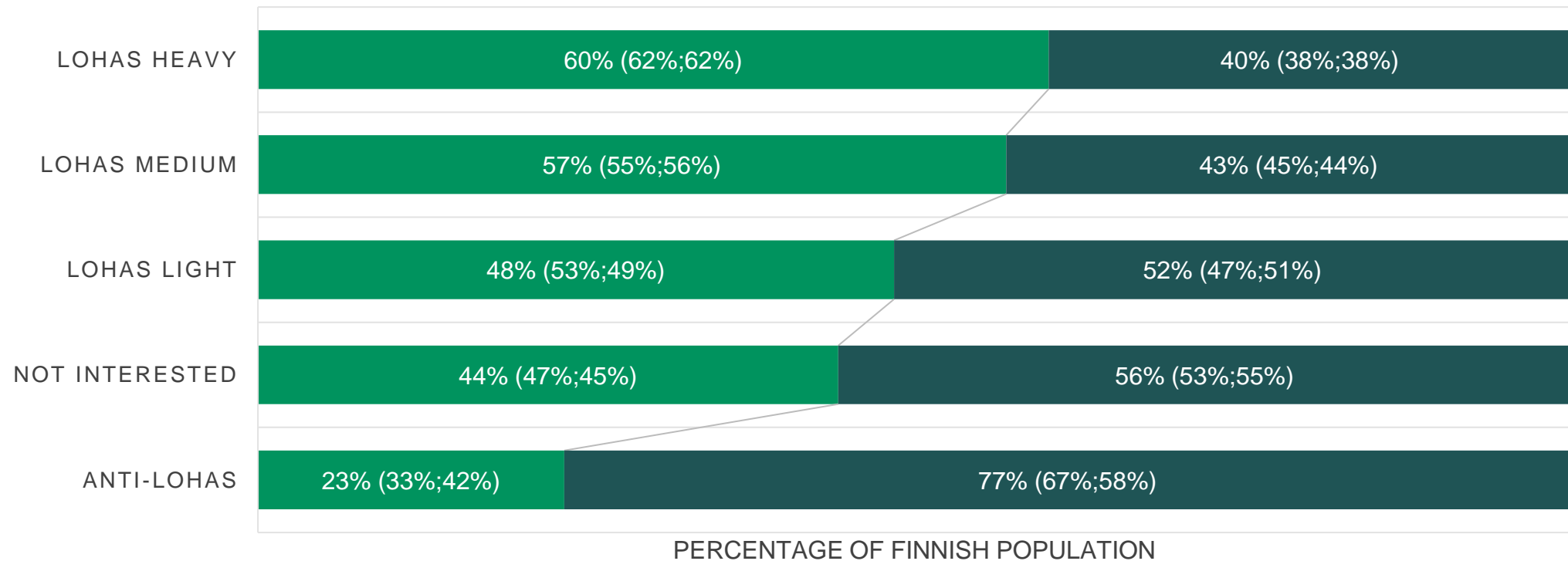
# The share of LOHAS heavy and medium groups has increased from 34% to 45% in the Finnish population



# The share of women has decreased in the Anti-Lohas group

## LOHAS GROUPS BY GENDER

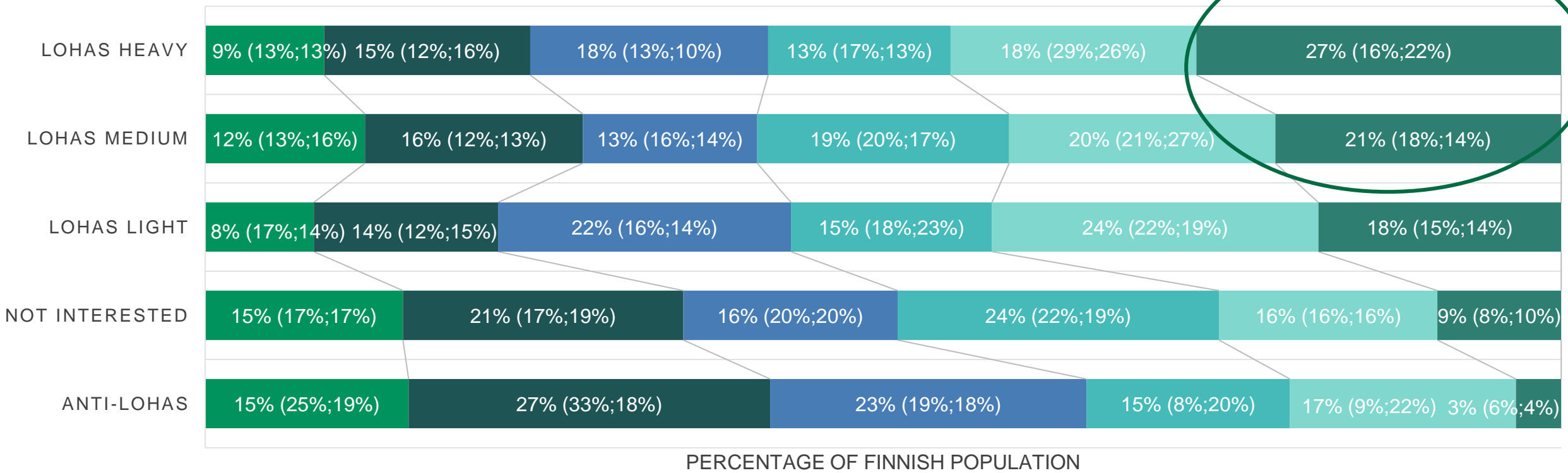
■ Female ■ Male



# 65+ represents a significant LOHAS group

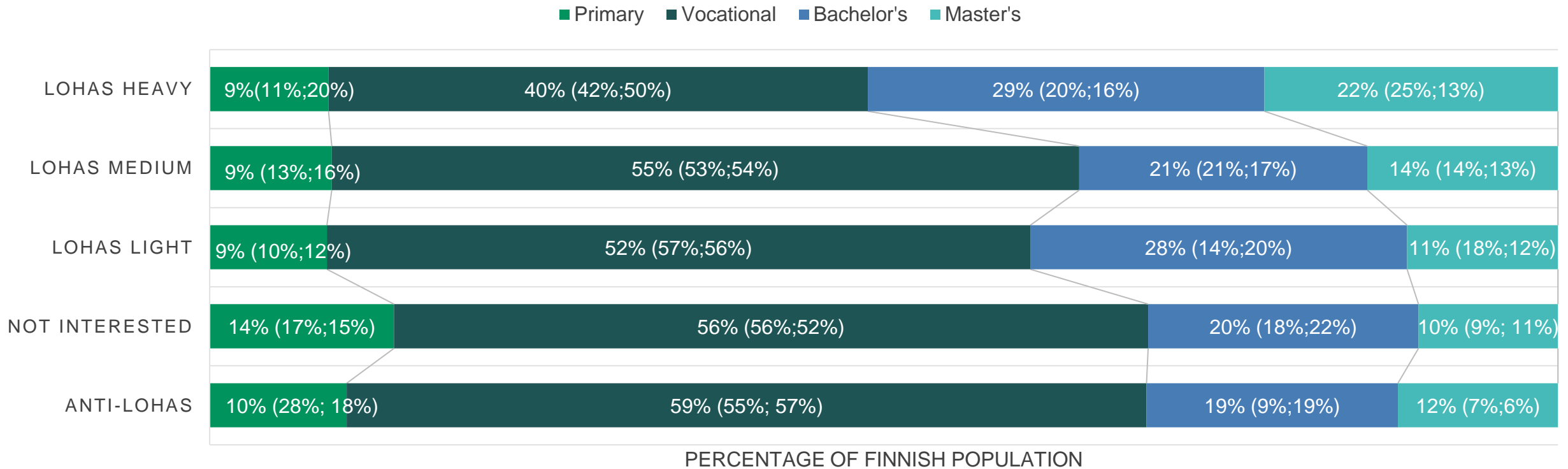
## LOHAS GROUPS BY AGE

18 - 24 25 - 34 35 - 44 45 - 54 55 - 64 65 - 75



# Higher level of education explains adoption of LOHAS values

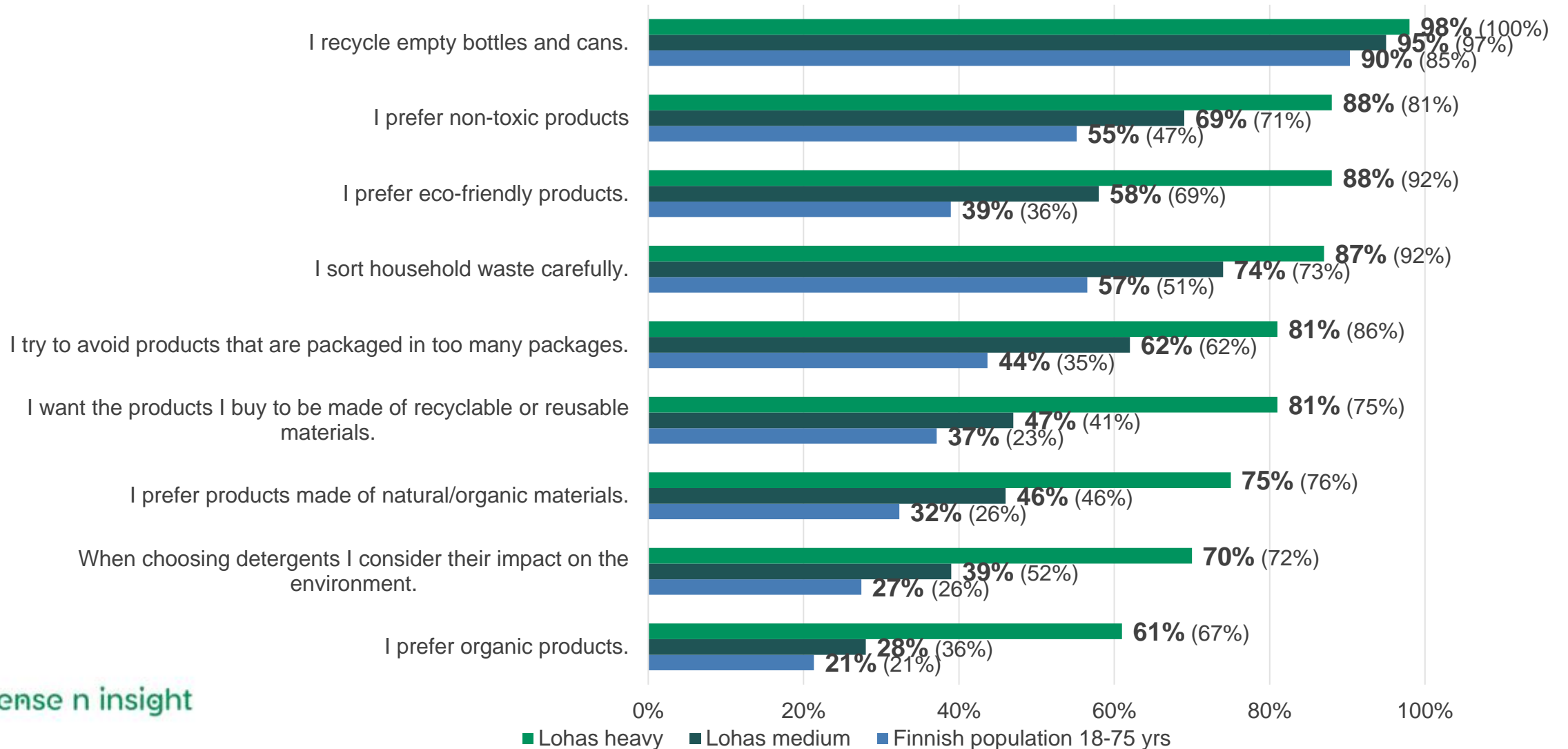
## LOHAS GROUPS BY EDUCATION LEVEL



# Environmental behaviour

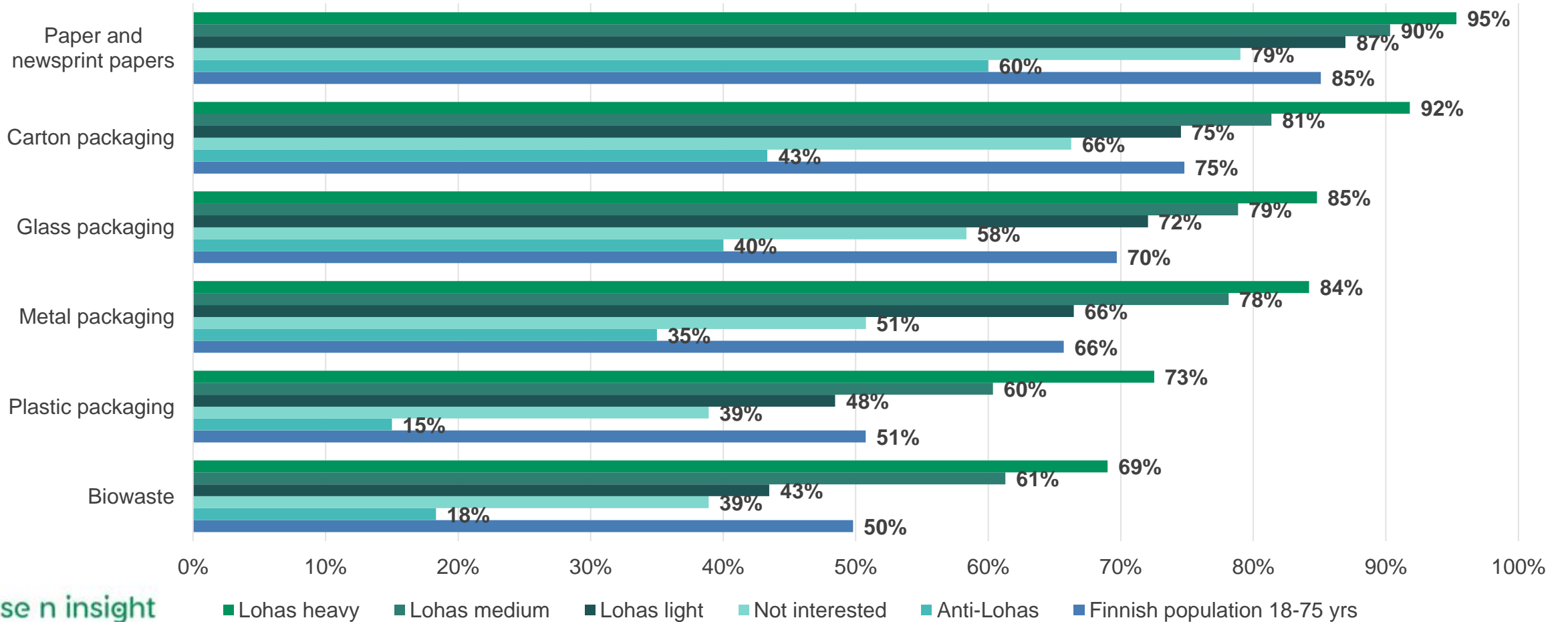
# Many pro-environmental behaviours have increased at population level in 2020

Describes me or my actions (well or very well), 2020 (2014), N=1000



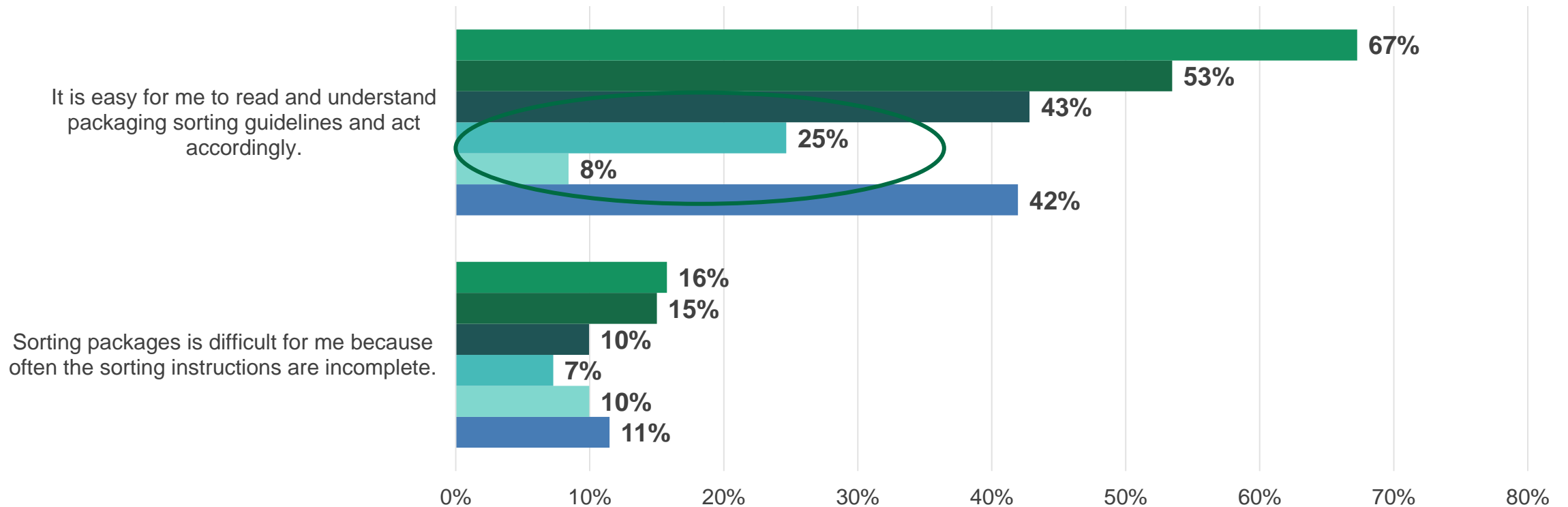
# LOHAS heavy and medium groups are the most frequent recyclers

Sort and recycle regularly in 2020 (N=1000)

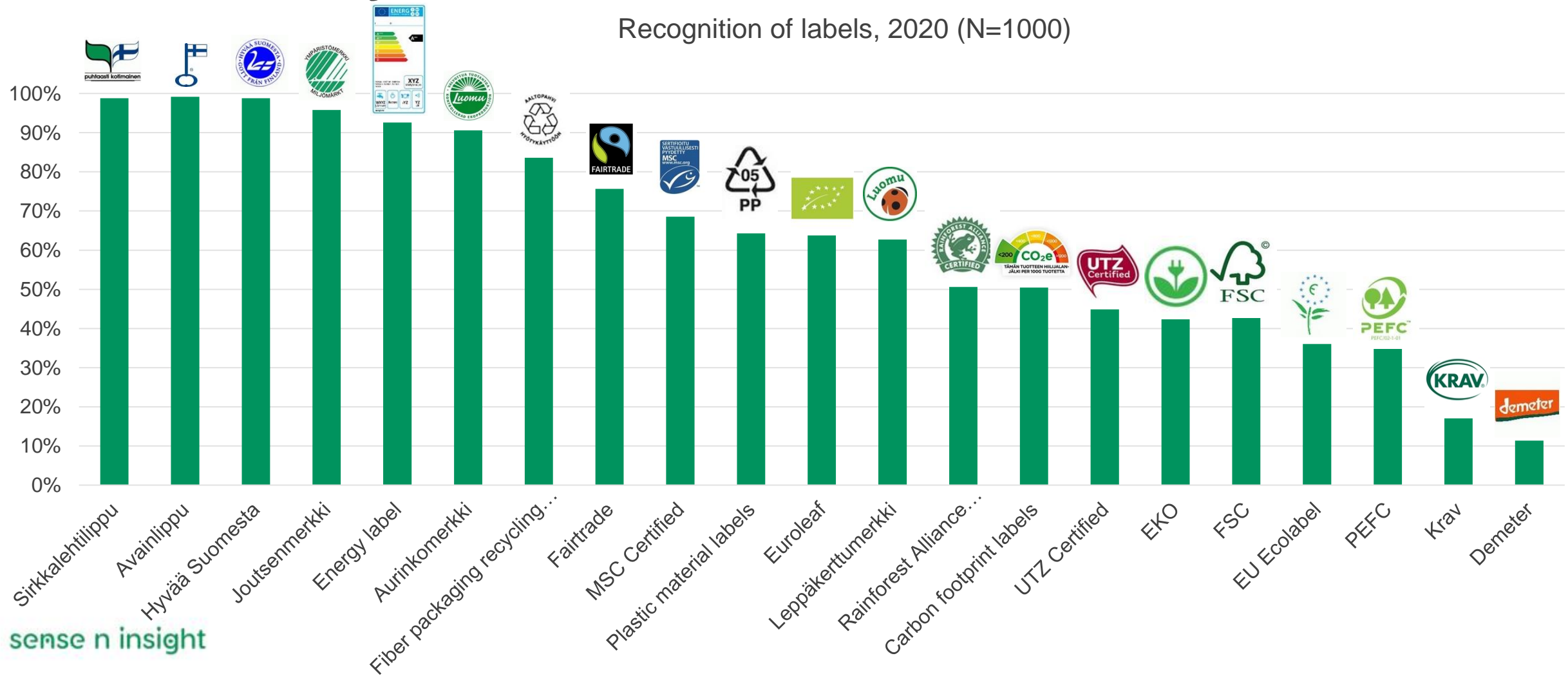


# Anti-Lohas and Not interested groups experience the most difficulties in following recycling guidelines

Attitudes to packaging sorting guidelines (strongly or somewhat agree), 2020 (N=1000)

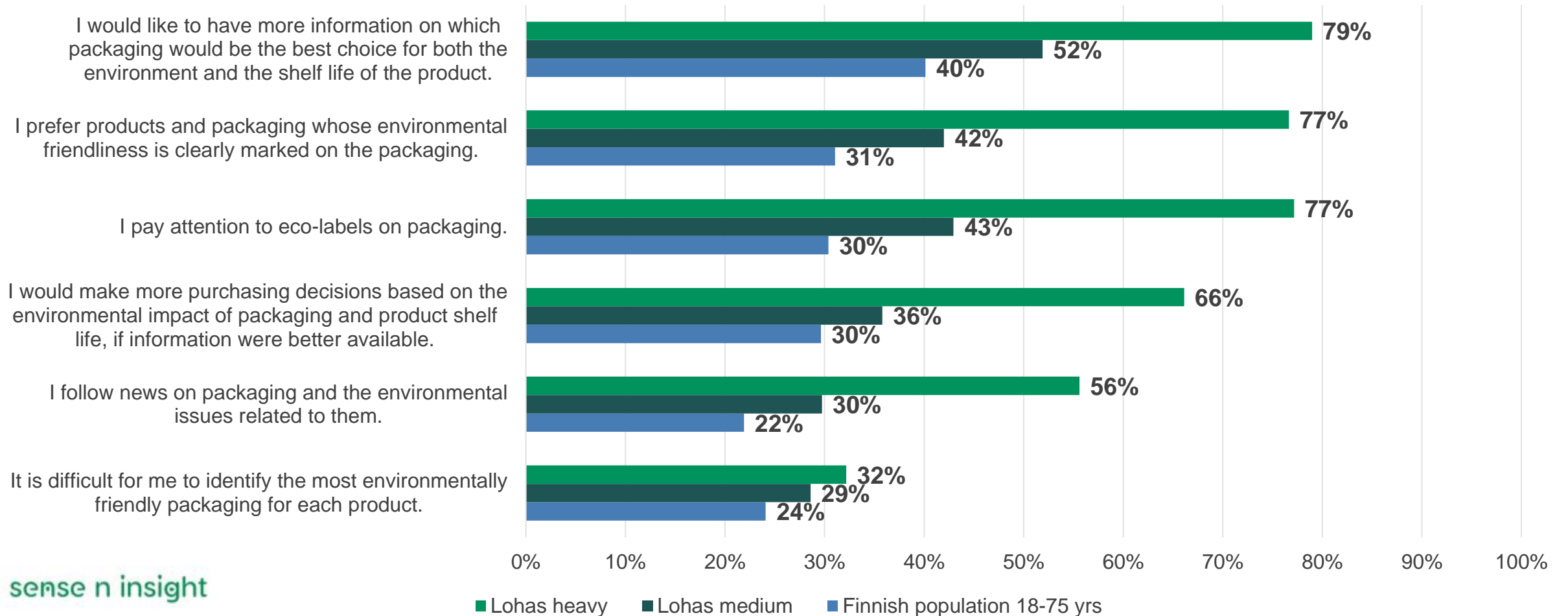


# Sirkkalehtilippu, Avainlippu and Hyvää Suomesta are recognised by 99%, carbon footprint label by 50% and FSC label by 43%



# Lohas heavy group shows the strongest interest in packaging sustainability

Interest in packaging sustainability (strongly or somewhat agree), 2020 (N=1000)



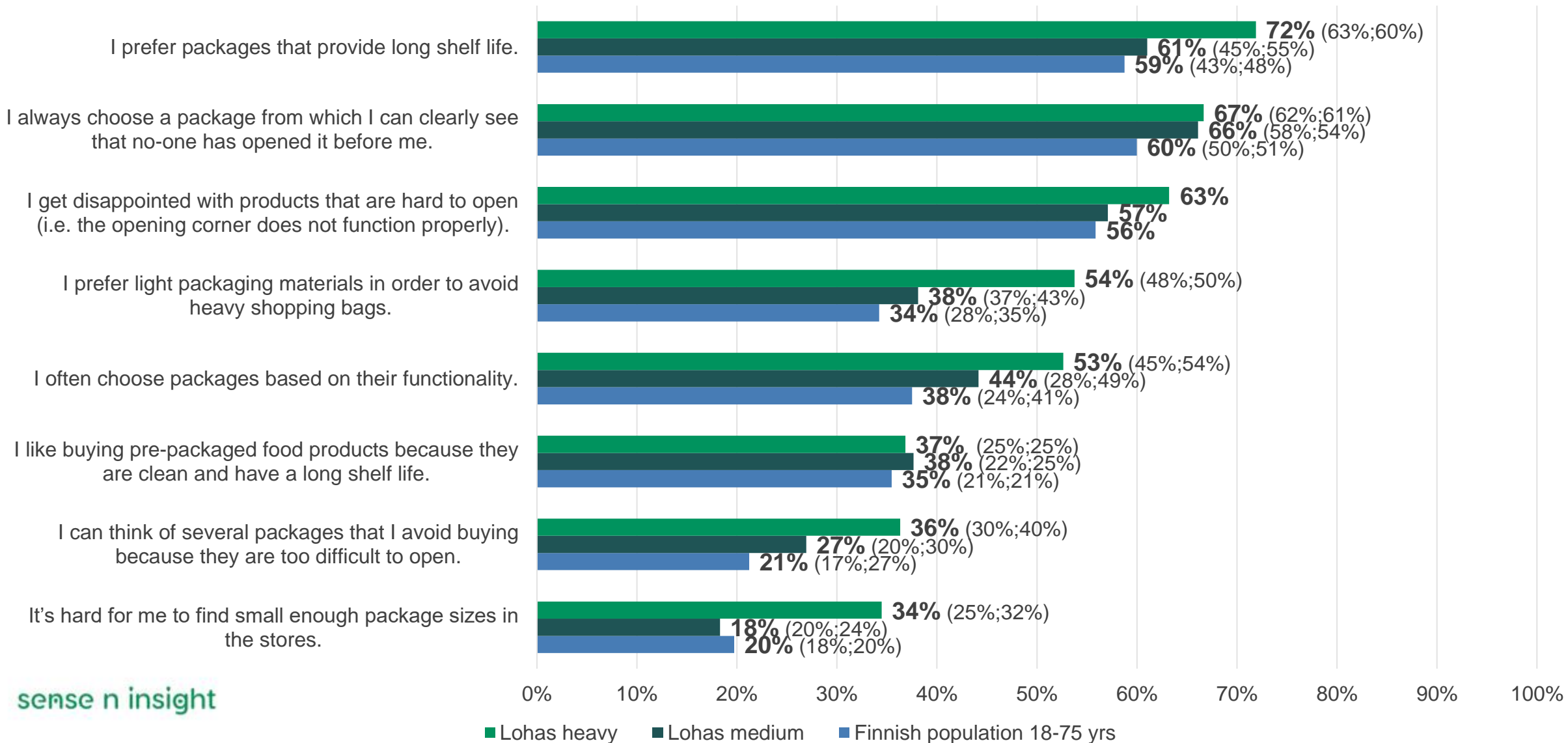
# Value of packaging

# Functional value

# Functional value has gained importance in all groups

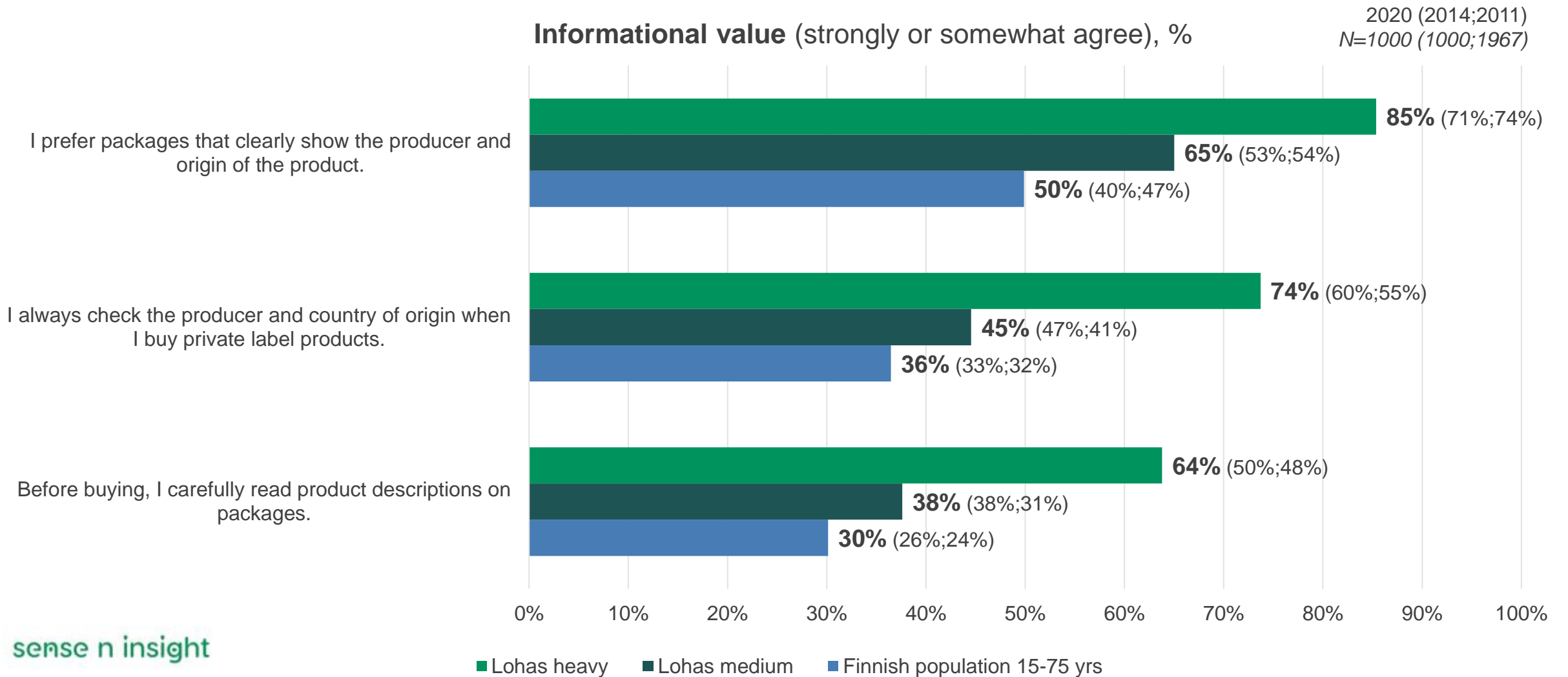
Functional value (strongly or somewhat agree), %

2020 (2014;2011)  
N=1000 (1000;1967)



# Informational value

# Informational value has gained importance especially in the Lohas heavy group

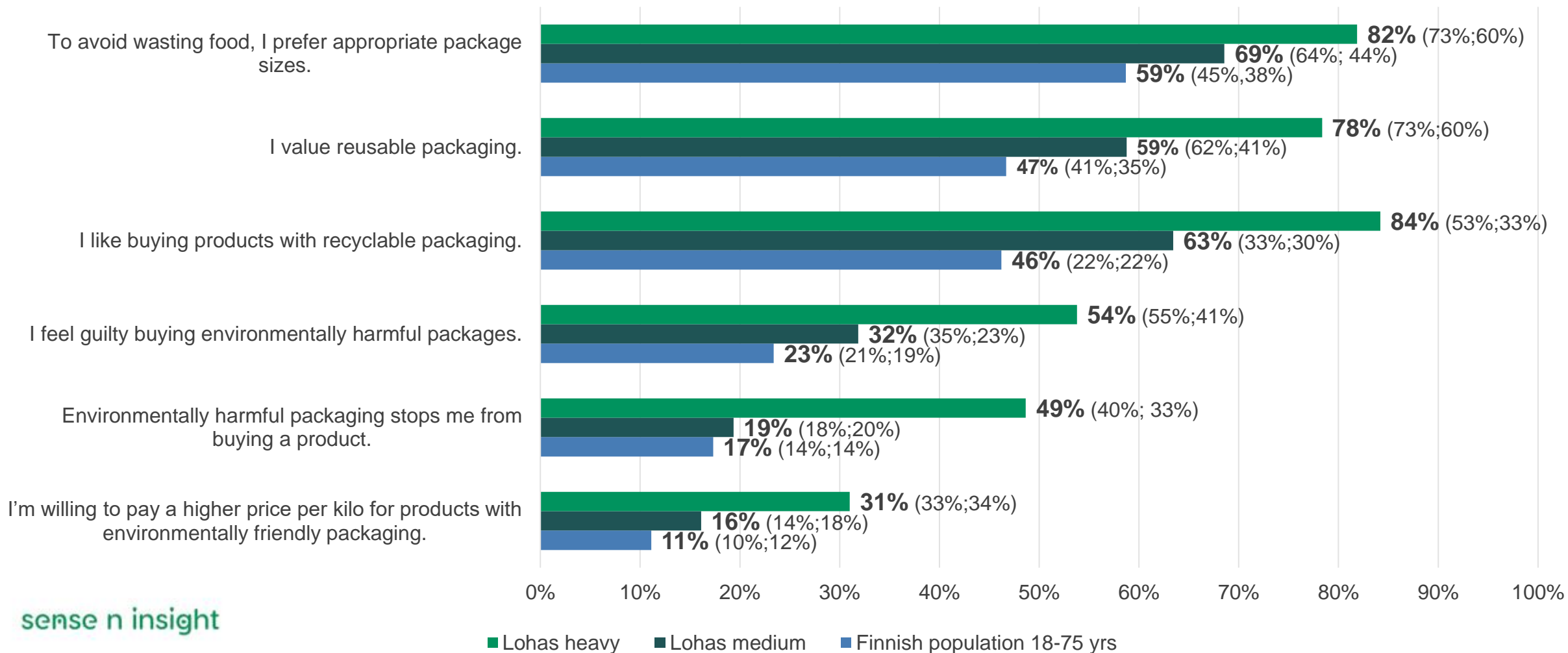


# Environmental value

# Environmental value has gained importance in the Lohas heavy group

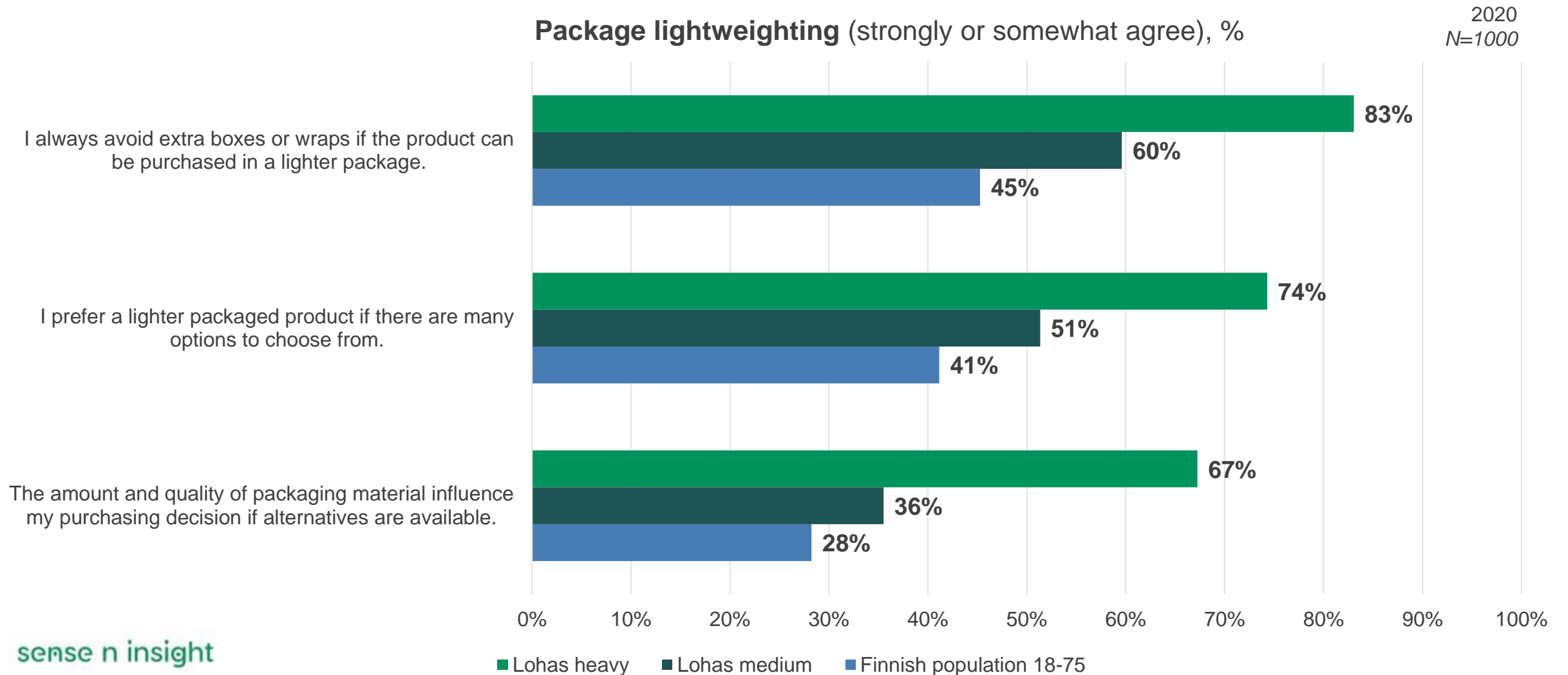
Environmental value, strongly or somewhat agree, %

2020 (2014;2011)  
N=1000 (1000;1967)



# **Environmental value (lightweighting)**

# Package lightweighting is valued highest by Lohas heavy

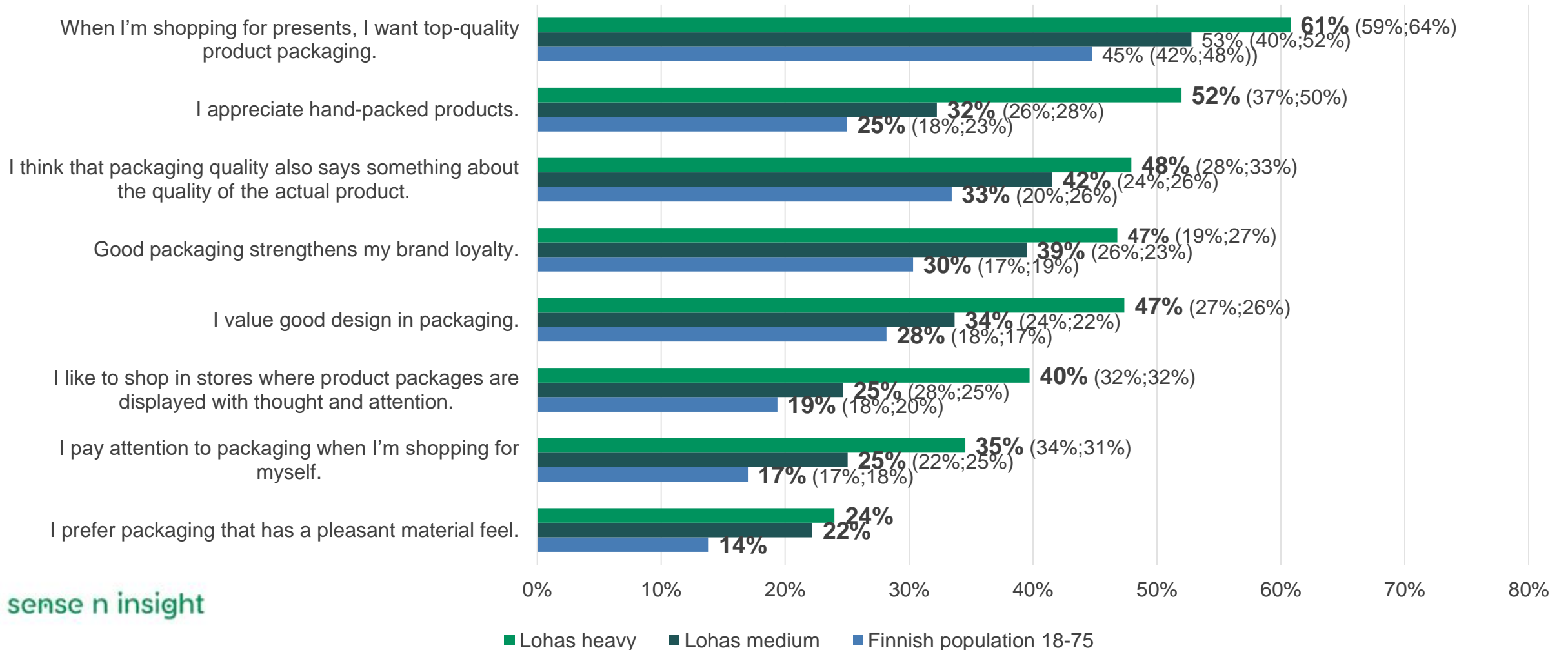


# Aesthetic/design value

# Aesthetic/design value has gained importance in all groups

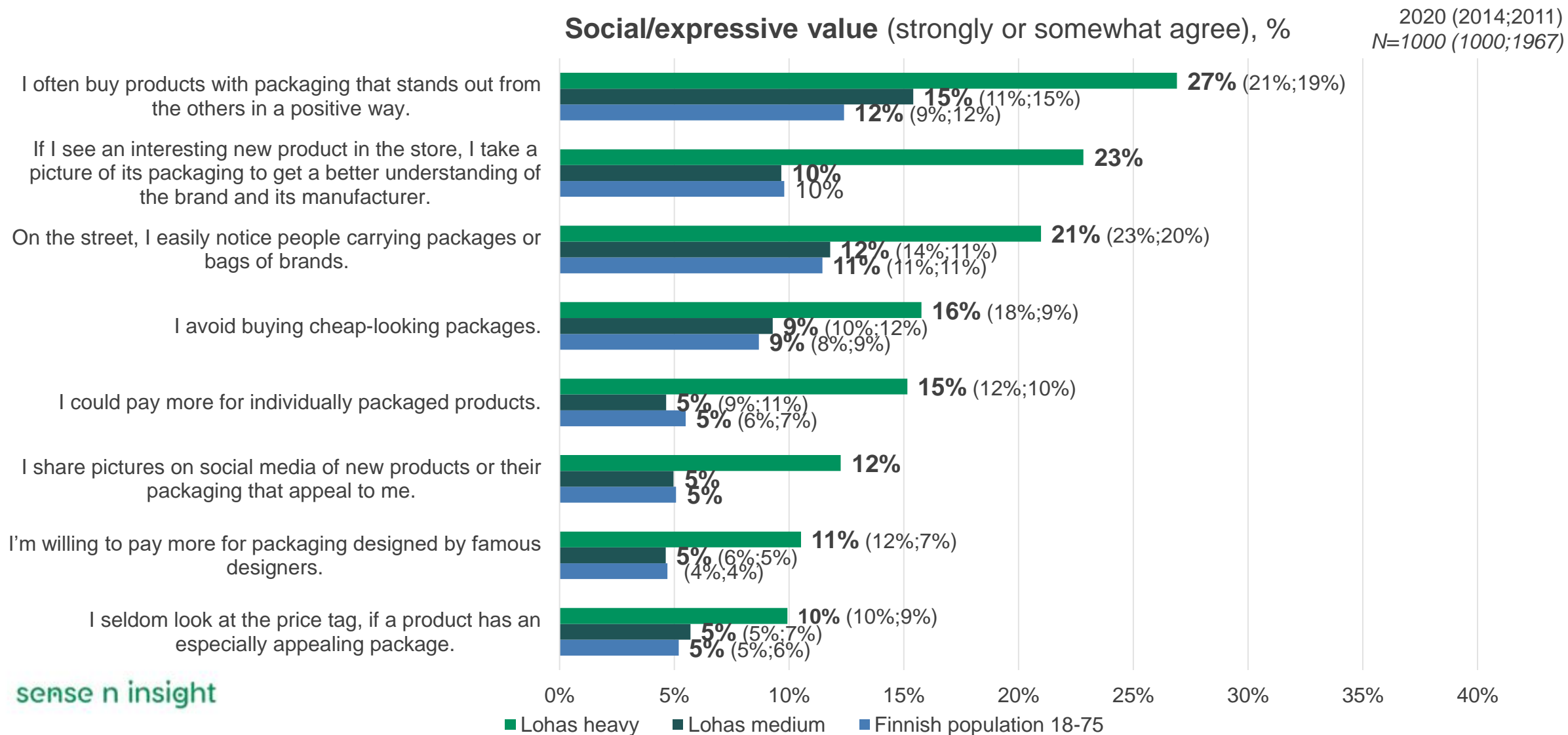
Aesthetic/design value (strongly or somewhat agree), %

2020 (2014;2011)  
N=1000 (1000;1967)



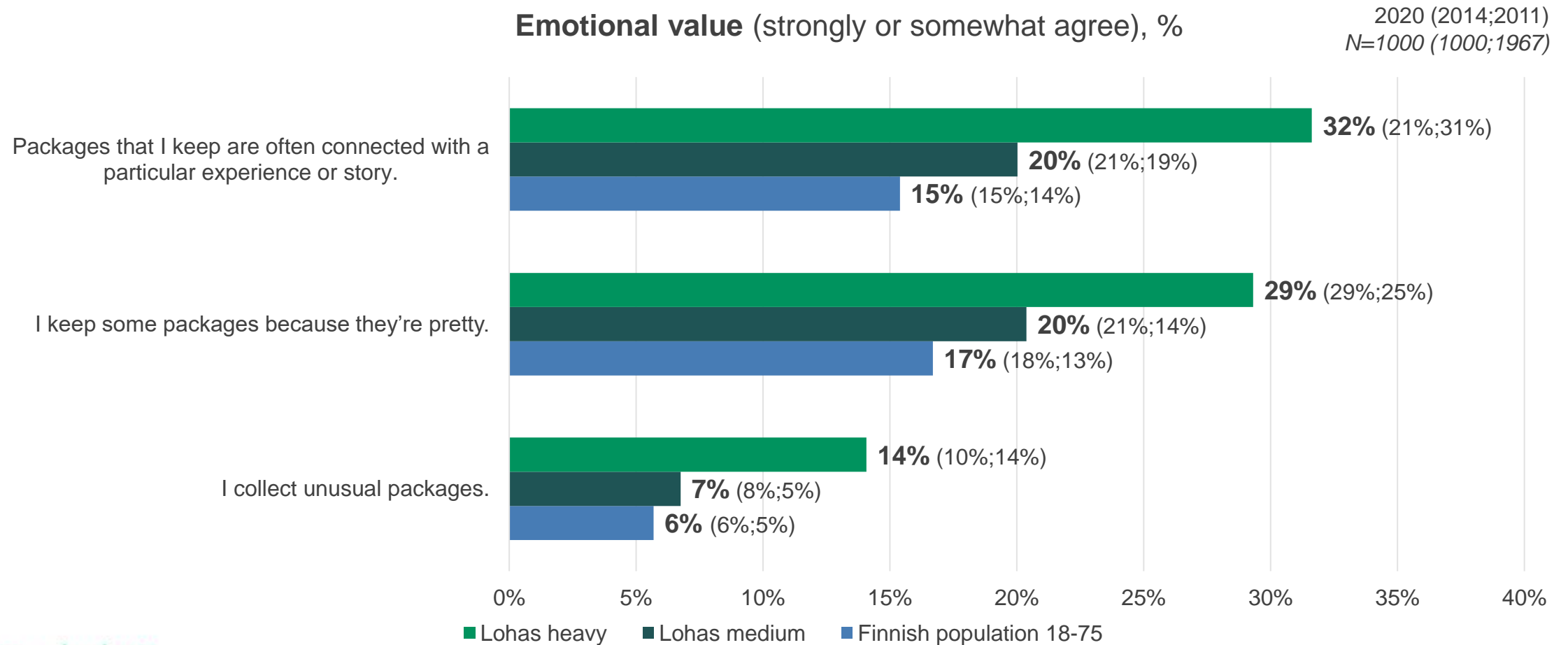
# Social/expressive value

# Social/expressive value has retained its importance and rates highest in the LOHAS heavy group



# Emotional value

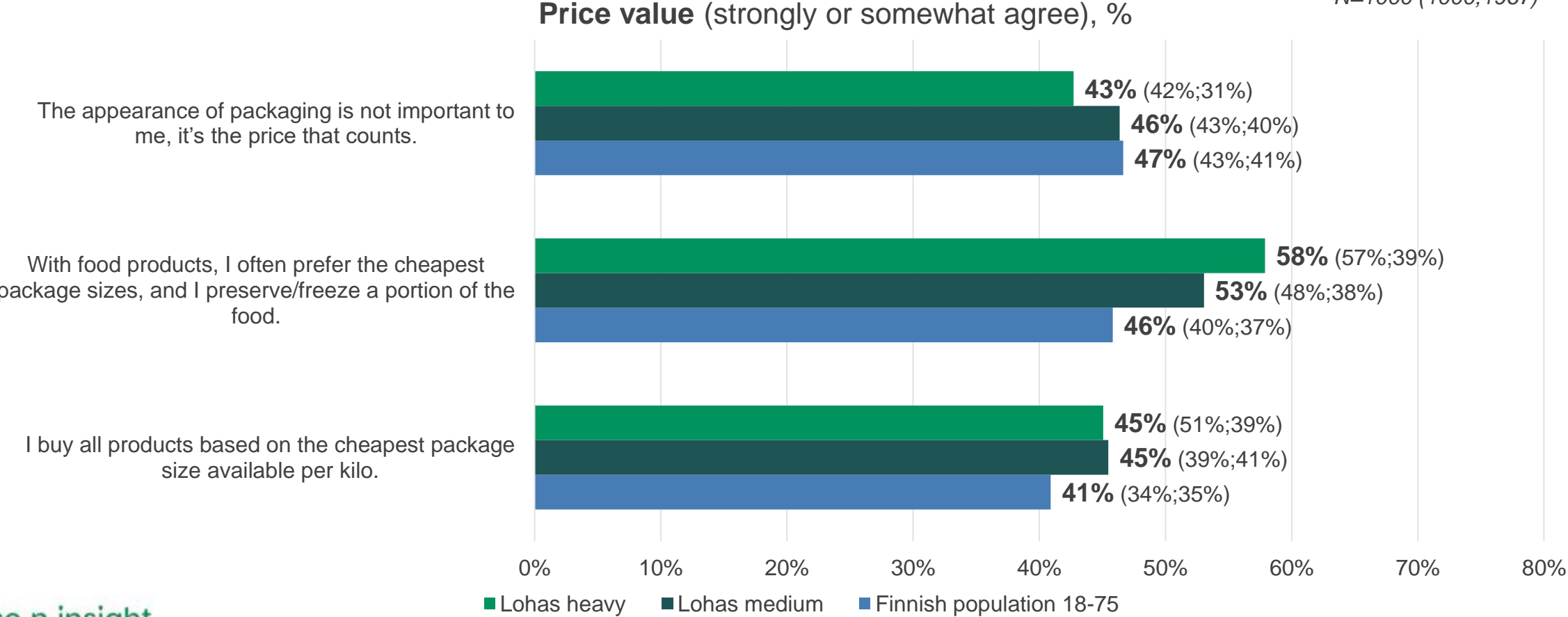
# Emotional value has retained its importance and scores highest in the LOHAS heavy group



# Price value

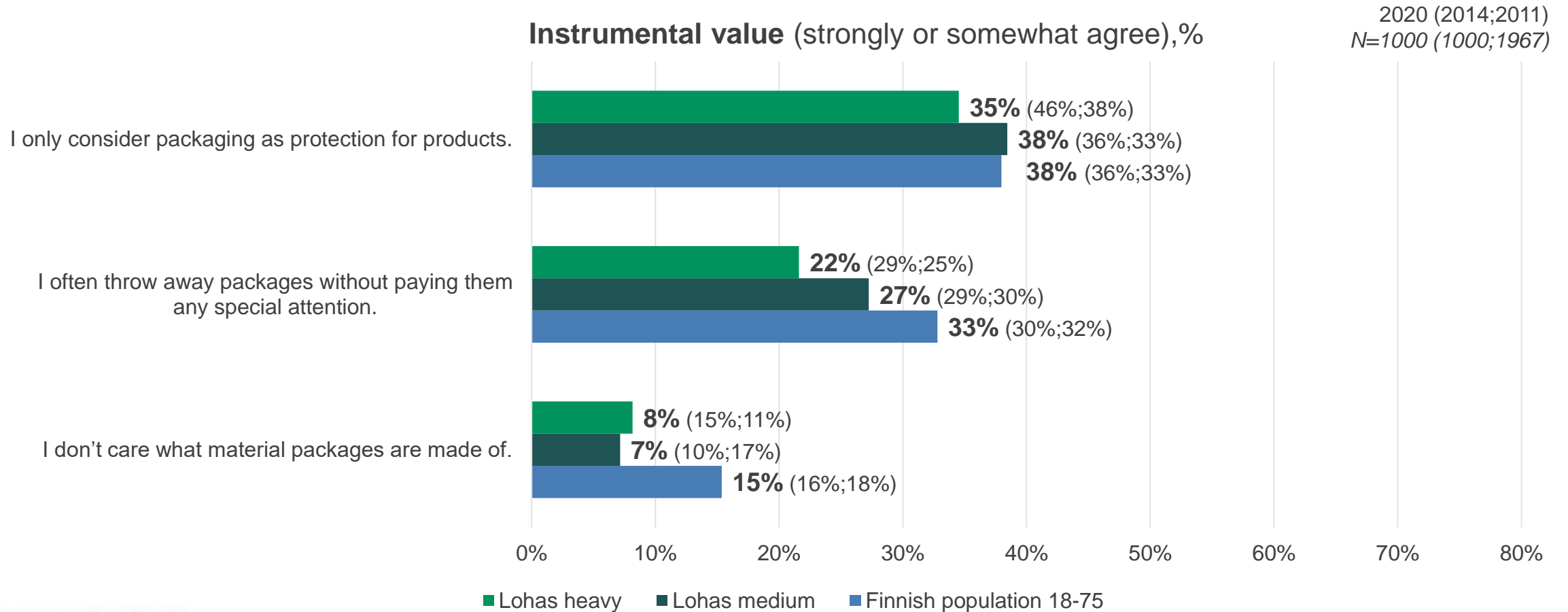
# Price value has gained importance in the Lohas medium group as well as at population level

2020 (2014;2011)  
N=1000 (1000;1967)



# Instrumental value

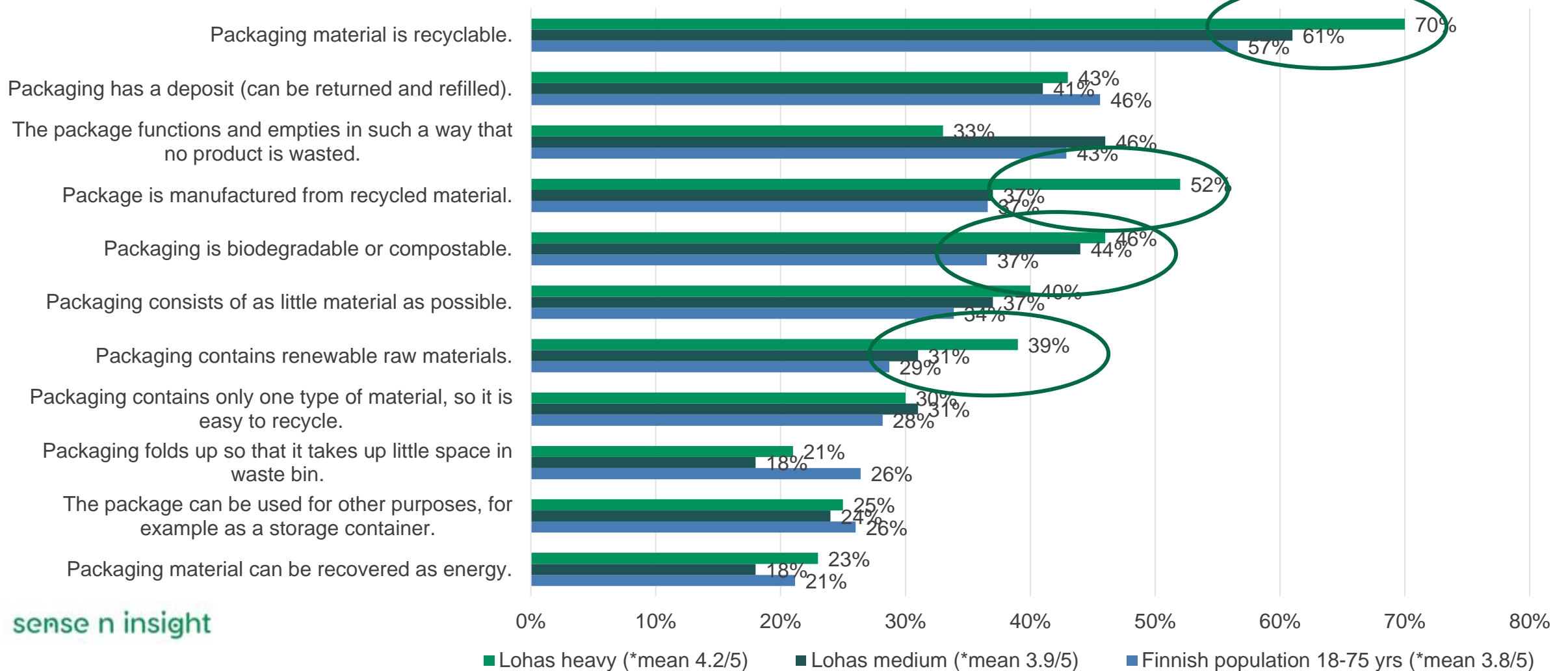
# Instrumental value (i.e. valuing packaging mainly for protection) has diminished in the Lohas heavy group



# Pro-environmental packaging

# Lohas heavy group values recyclable packaging manufactured of recycled, renewable or biodegradable materials

“Name top 3-5 characteristics\* in pro-environmental packaging” 2020 (N=1000)



# Key takeaways



# LOHAS values gain importance

**45%**

of Finns represent LOHAS heavy or medium groups

**65%**

of Finns feel positive about gaining more information on the sustainability of packaging

**72%**

of Finns state that packaging recyclability is important in their purchasing decisions\*

**79%**

of Finns state that the capability of the packaging to minimise the amount of food waste is important in their purchasing decisions\*



# Lohas heavy consumers have high expectations for packaging sustainability

**85%**

prefer packages that clearly show the producer and origin of the product\*

**82%**

prefer appropriate package sizes to avoid wasting food\*

**83%**

avoid extra boxes or wraps if the product can be purchased in a lighter package\*

**54%**

feel guilty buying environmentally harmful packages\*

## **2. Consumer value for future applications**

# 1. Value is based on consumers' subjective evaluation





## 2. Value results from interaction between consumers and the package

**3. Value is always relative to other brands or similar products**





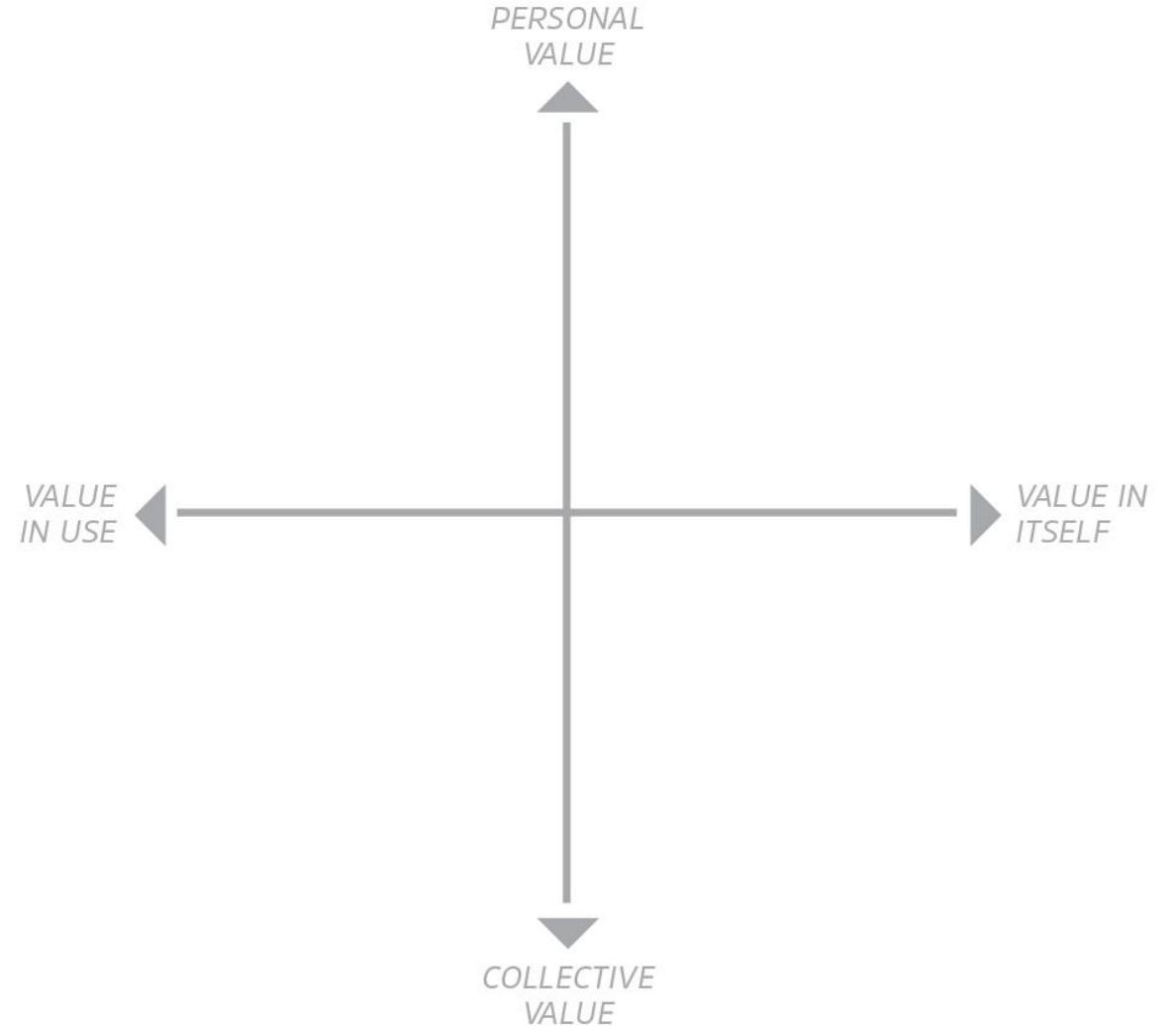
**4. Value is always situational, depending on the retail environment and user situation**

# concept of consumer value

Value is determined by two dimensions (Holbrook 1999):

The first dimension ranges from the value of packaging **in use** (extrinsic value) to packaging valued **in itself** (intrinsic value).

The second dimension ranges from **personal** to **collective** value.



# Value Toolkit

Value Toolkit is a SNI research tool for measuring and visualizing consumers' value perceptions.



# Value toolkit 3.0 dimensions

The four main dimensions of the toolkit are **Performance**, **Experience**, **Responsibility** and **Status value**.

The main dimensions are divided into subdimensions, and altogether the toolkit utilizes 24 different subdimensions.



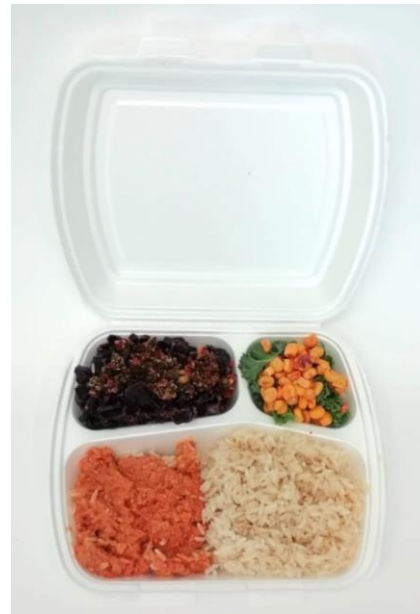
# Consumer value for takeaway packaging

# Multi-tray for takeaway food

sense n insight



# Evaluated samples



Polystyrene



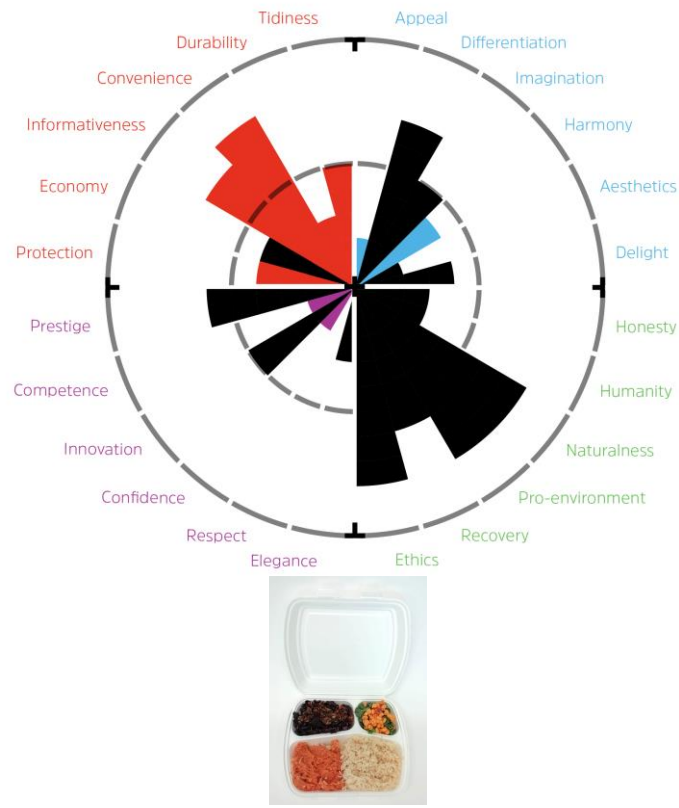
Bagasse



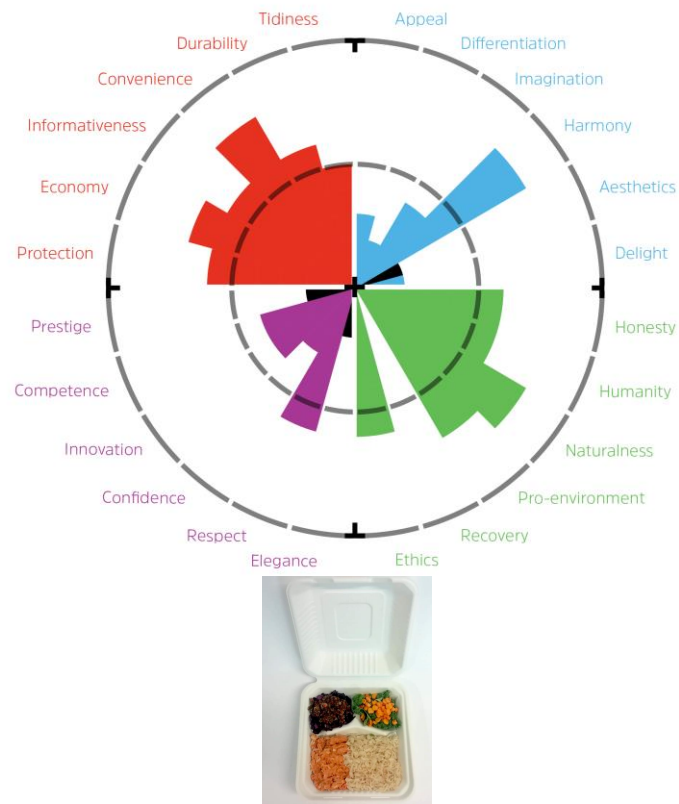
Cardboard

# The cardboard multi-tray scored highest in overall user experience, status value and responsibility

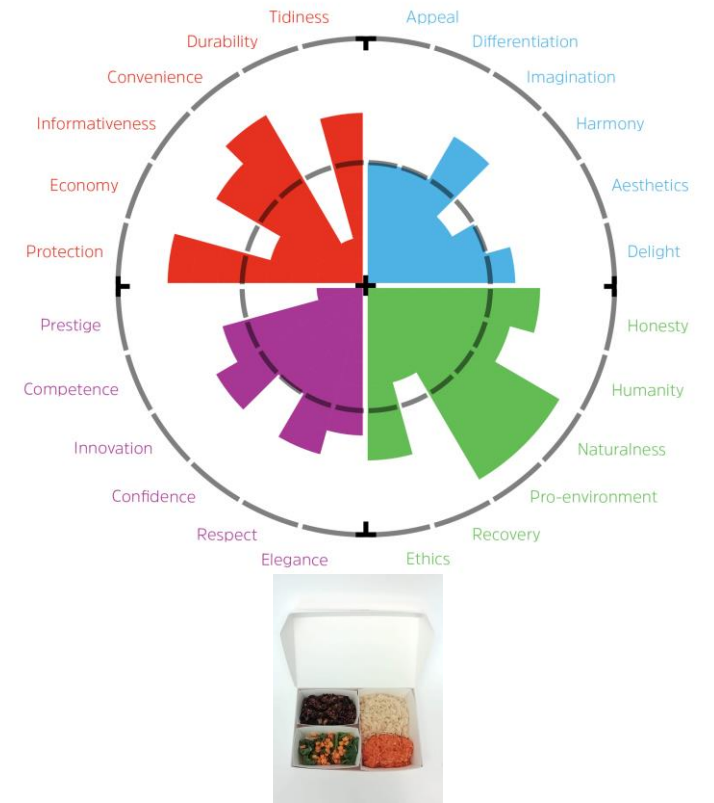
PS container



Bagasse

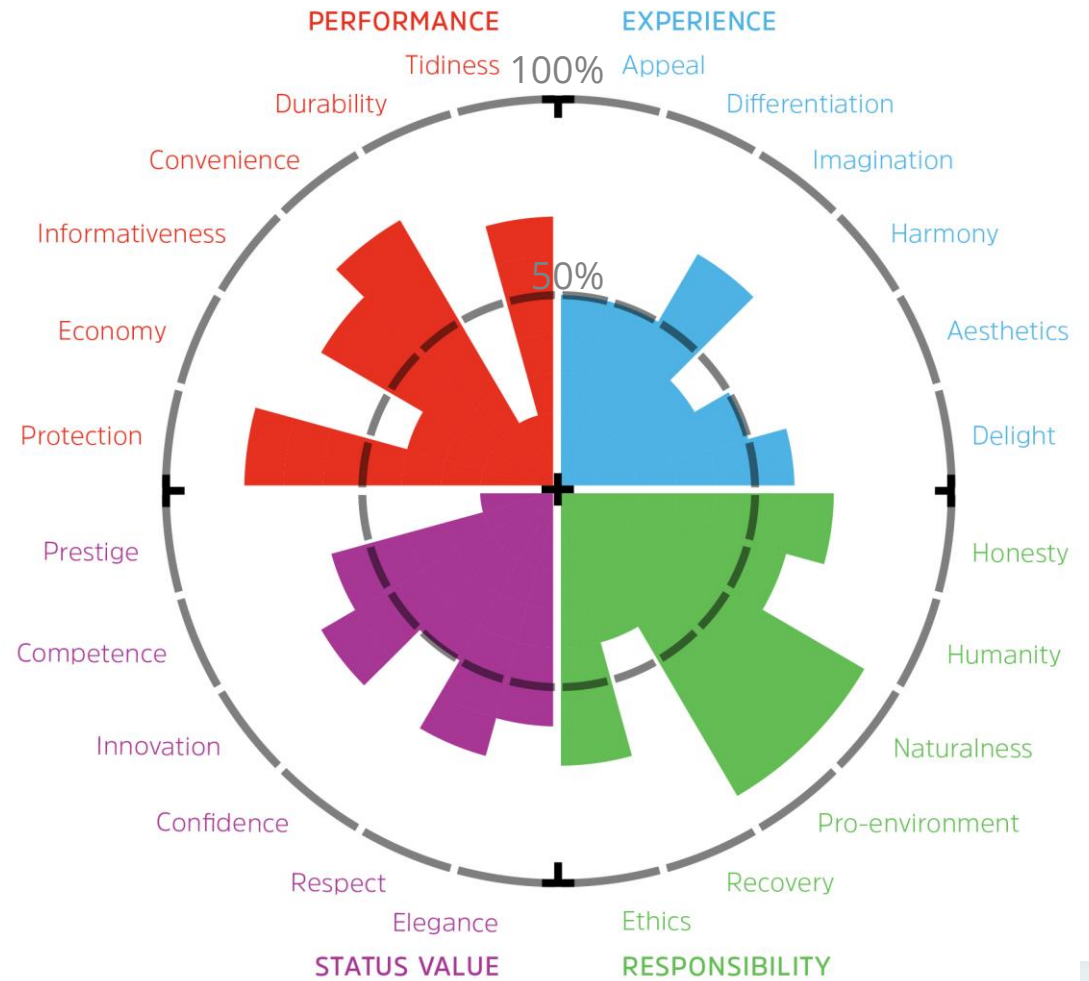


Cardboard multi-tray



**Multi-tray, TOP ATTRIBUTES, n = 20**

<b>Easy-to-recycle, Pro-environmental</b>	<b>95 %</b>
<b>Convenient, Functional, Tidy, Natural, Organic</b>	<b>90 %</b>
<b>Comprehensible, Imaginative, Distinguishable, Forerunner, Responsible, Nature-friendly</b>	<b>85 %</b>
<b>Protective, Safe, Delightful, Insightful, Presentable, Esteemed</b>	<b>80 %</b>
<b>Hygienic, Economical, Innovative, Convincing, Authentic</b>	<b>75 %</b>
<b>Informative, Elegant, Respected, Expert, Skilful, Honest, Ethical, Humane</b>	<b>70 %</b>



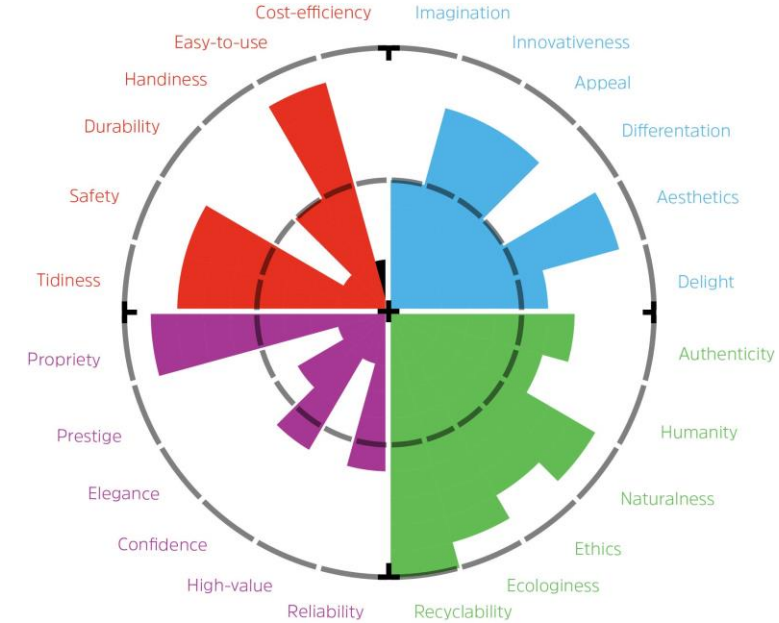
# Smart Set



# Evaluated samples



# Smart Set performed stronger in all dimensions



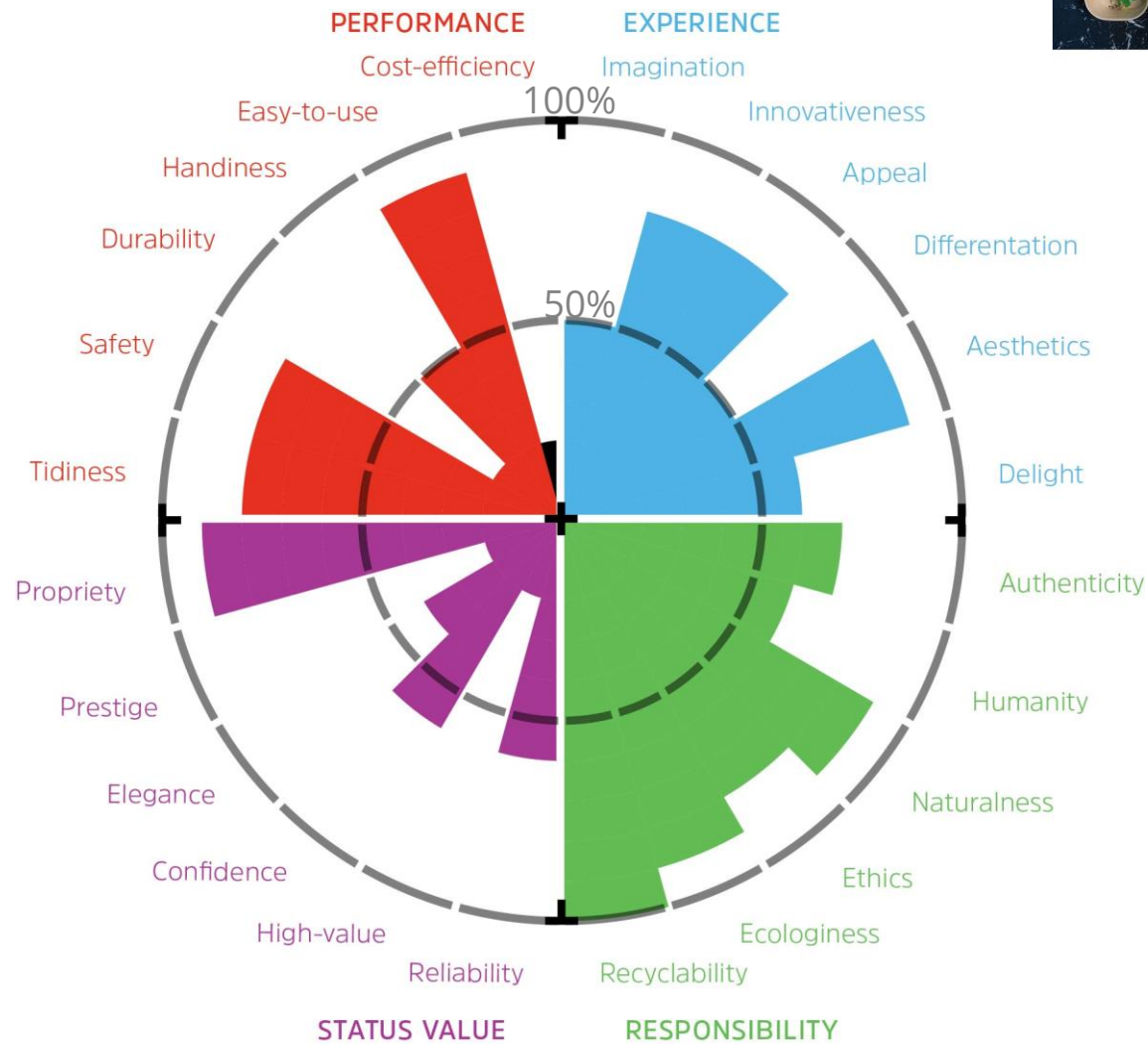
PERFORMANCE ● EXPERIENCE  
 STATUS VALUE ● RESPONSIBILITY  
 ● NEGATIVE

Note! In the Value Toolkit® profile each sector represents the % of negative ratings subtracted from the % of positive ratings within the collected data.



Smart Set, TOP ATTRIBUTES, n=17

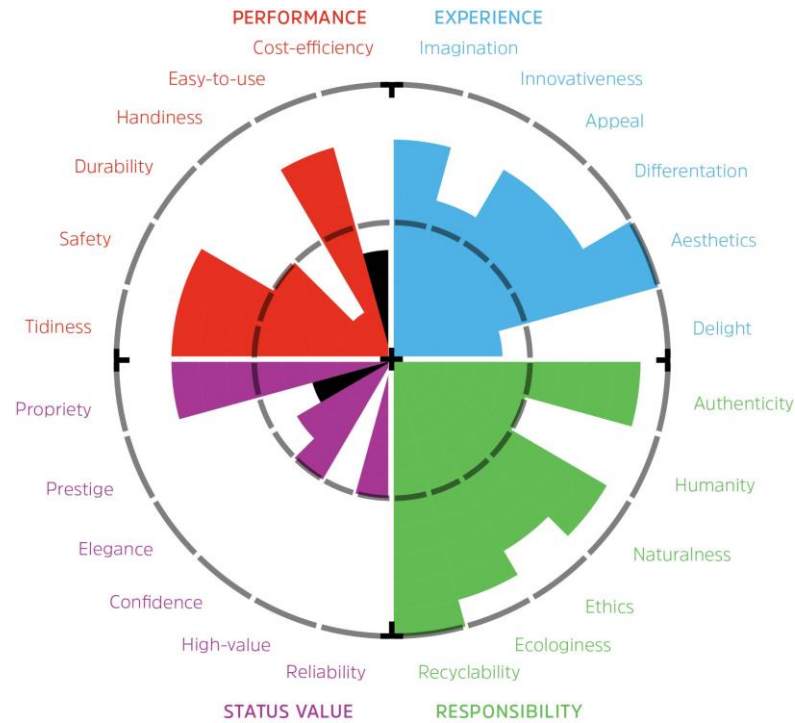
Easy-to-recycle	100 %
Easy-to-use, Aesthetic, Appropriate, Natural, Ecological	94 %
Tidy, Safe	88 %
Innovative, Appealing, Ethical	82 %
Handy, Delightful, Authentic, Humane	71 %
Imaginative, Elegant, Reliable, Confident	65 %
Distinguishable, Prestigious, High-value	59 %
Durable	53 %



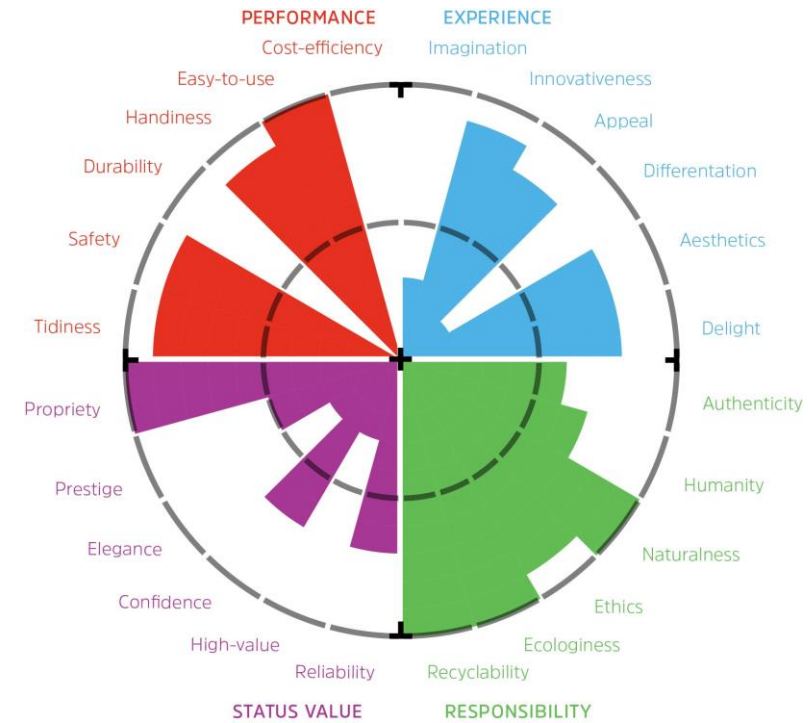
Note! In the Value Toolkit® profile each sector represents the % of negative ratings subtracted from the % of positive ratings within the collected data.

# Finnish consumers gave Smart Set higher ratings for packaging experience, Italians for quality attributes

Finnish (n=8)



Italian (n=9)

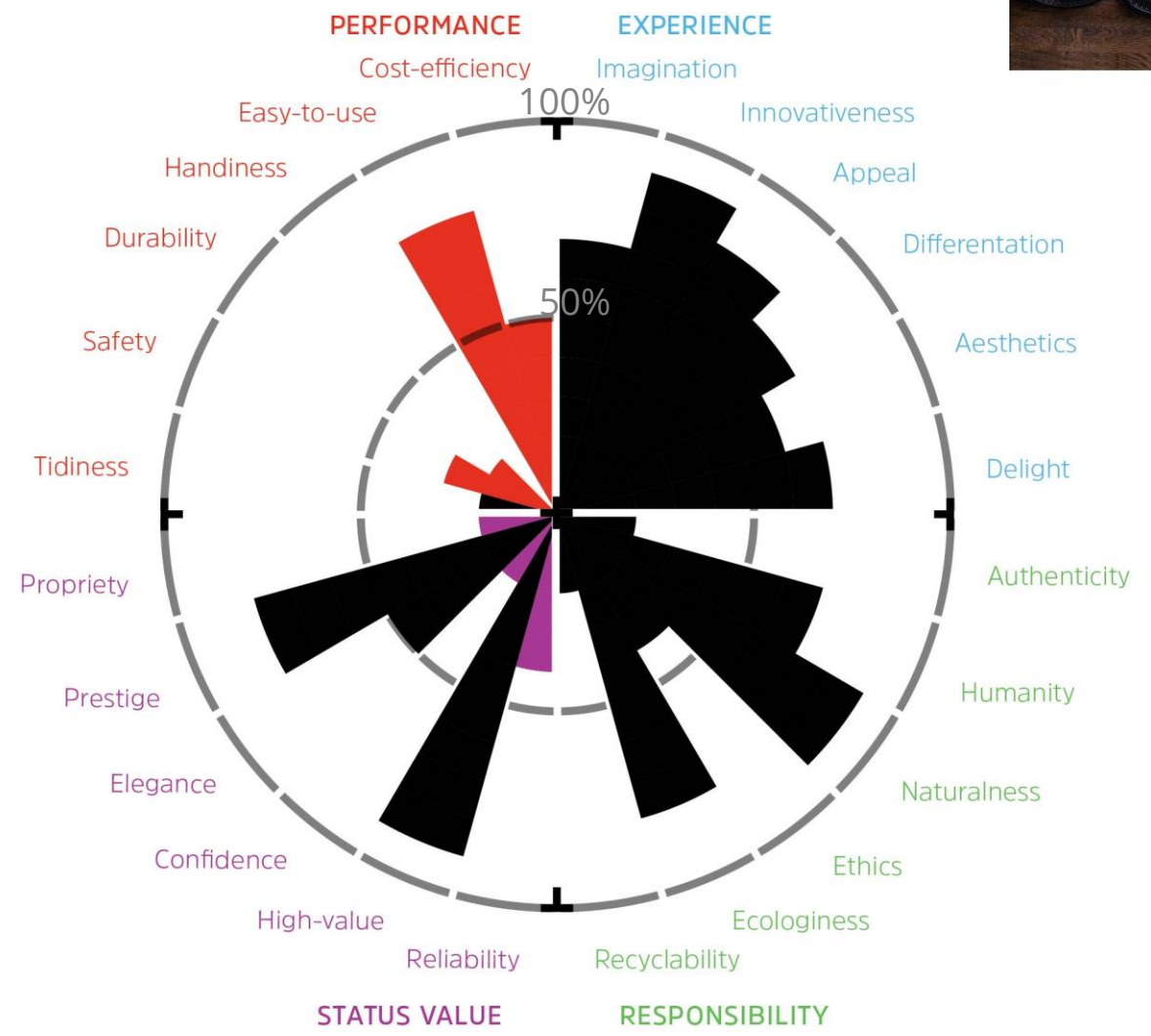


PERFORMANCE ● EXPERIENCE  
 STATUS VALUE ● RESPONSIBILITY  
 ● NEGATIVE

Note! In the Value Toolkit® profile each sector represents the % of negative ratings subtracted from the % of positive ratings within the collected data.

PP tray, TOP ATTRIBUTES, n=17

Standard value	94 %
Easy-to-use, Bland, Everyday, Unnatural	88 %
Unappealing, Unecological	82 %
Unimaginative, Unaesthetic	76 %
Indistinguishable	76 %
Boring, Inelegant	71 %
Cost-efficient, Reliable, Technical	65 %
Appropriate	53 %

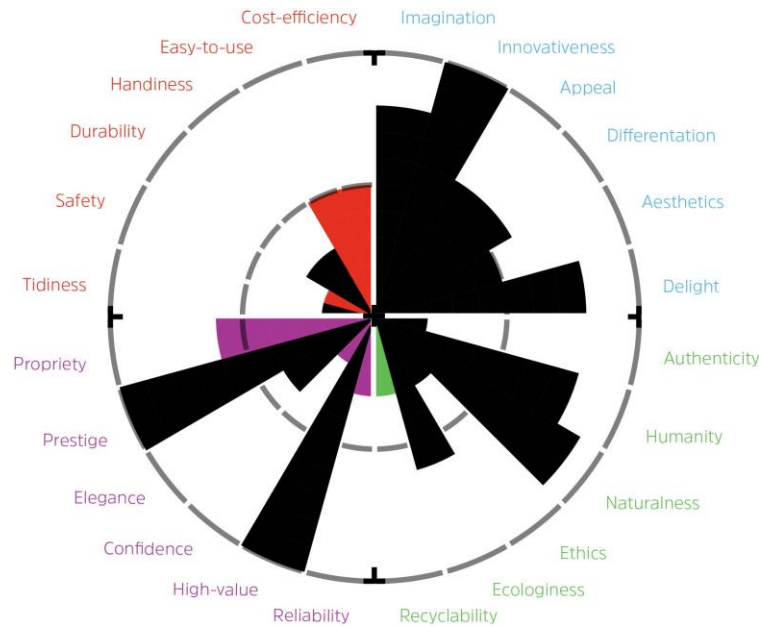


Note! In the Value Toolkit® profile each sector represents the % of negative ratings subtracted from the % of positive ratings within the collected data.

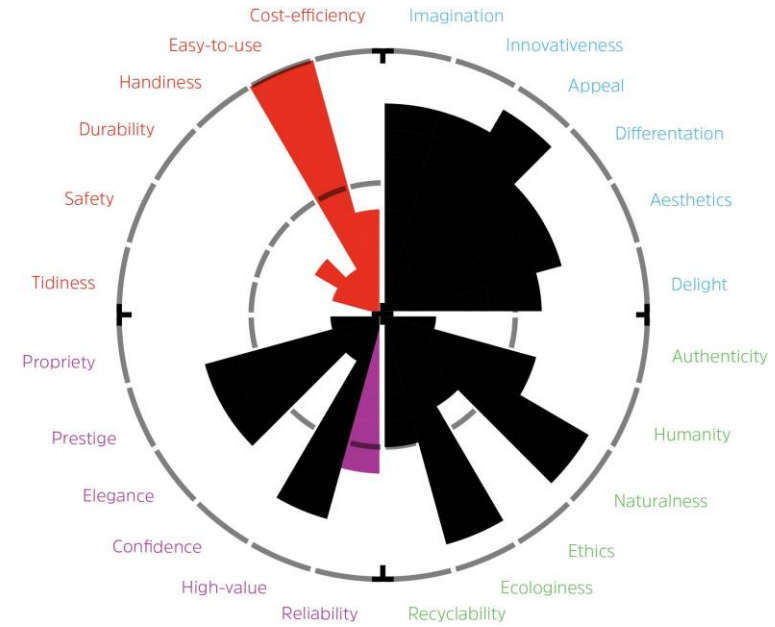
# Italians were more critical in their views towards the PP tray



Finnish (n=8)



Italian (n=9)



- PERFORMANCE ● EXPERIENCE
- STATUS VALUE ● RESPONSIBILITY
- NEGATIVE

Note! In the Value Toolkit® profile each sector represents the % of negative ratings subtracted from the % of positive ratings within the collected data.

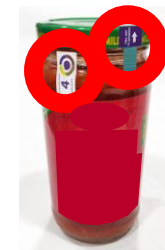
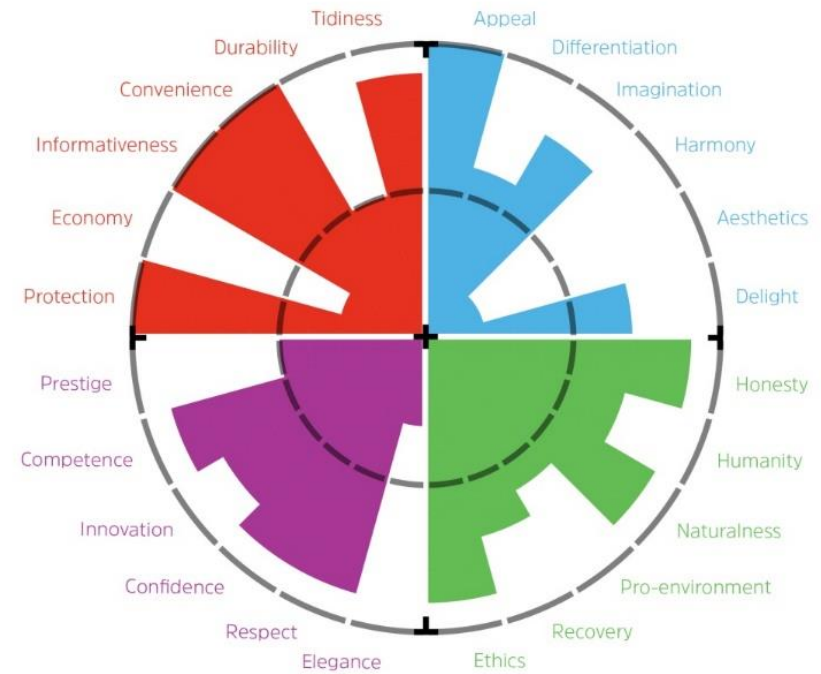
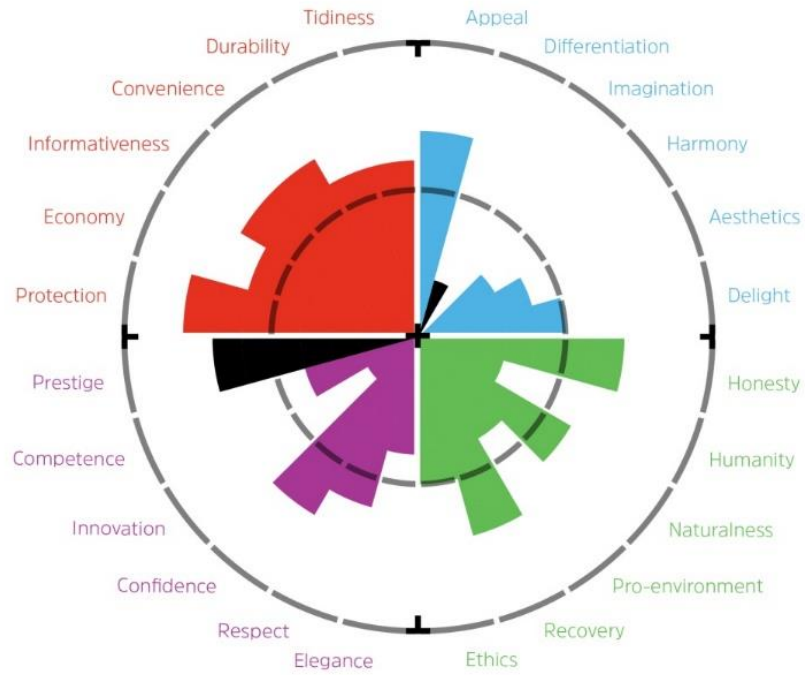
# Consumer value for intelligent packaging

# Insignia® after opening timer

sense n insight



# Taco sauce with timer scored higher in all dimensions

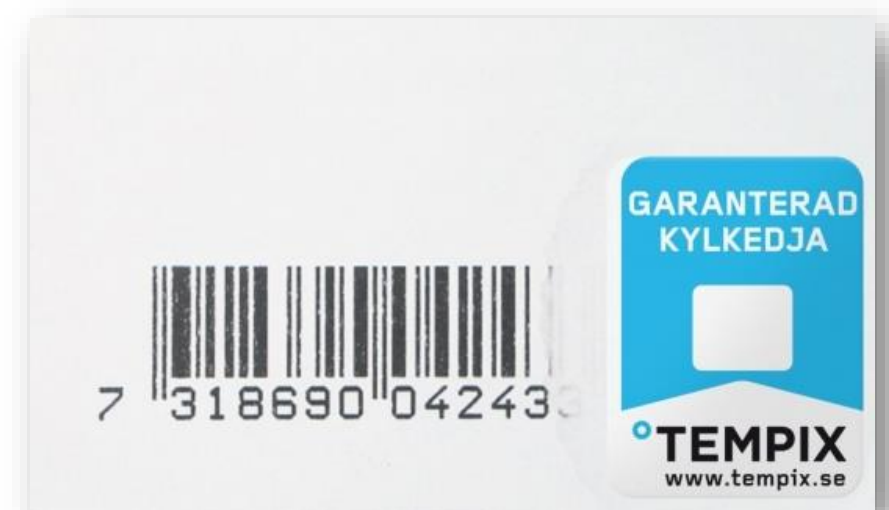


- PERFORMANCE ● EXPERIENCE ●
- STATUS VALUE ● RESPONSIBILITY ●
- OPPOSITE ●

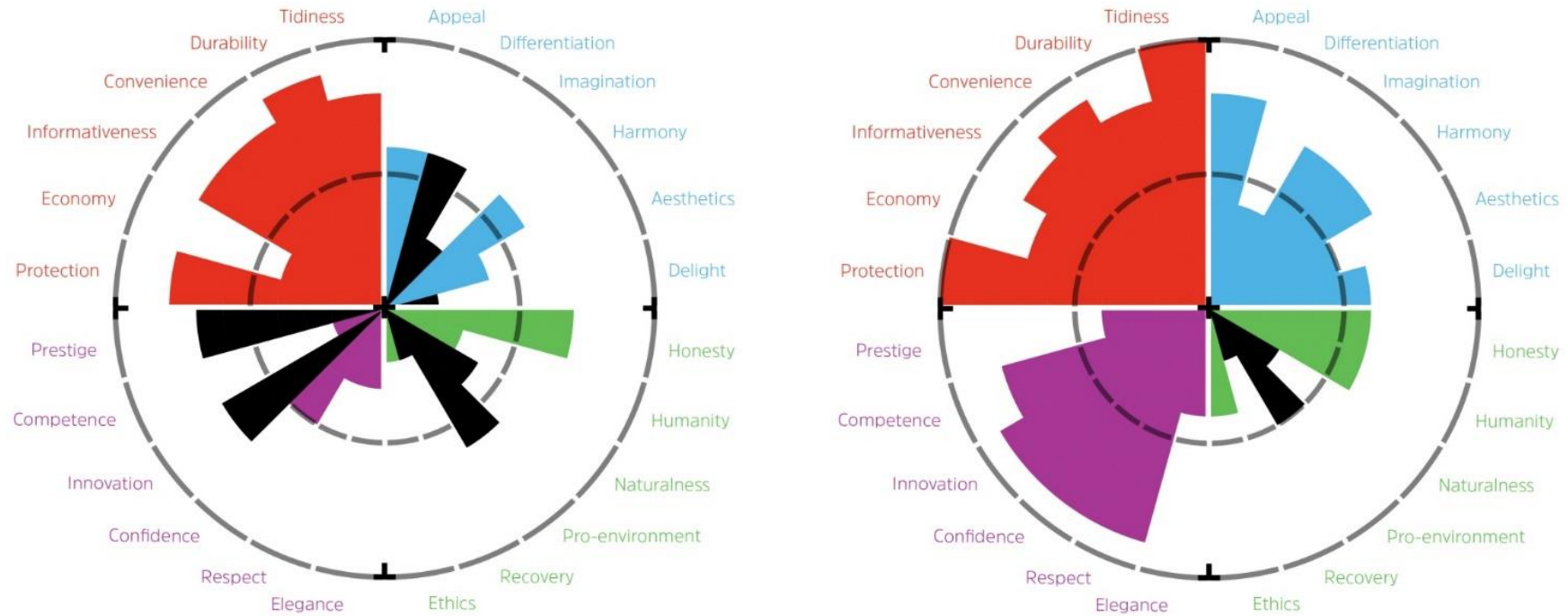
# Taco sauce: largest attribute differences between sample ratings (% of participants, n=10)

Taco sauce	No timer	With timer	Difference
Valuable	20 %	80 %	60 %
Prestigious	0 %	60 %	60 %
Imaginative	40 %	90 %	50 %
Insightful	30 %	80 %	50 %
Forerunner	40 %	90 %	50 %
Skilful	40 %	90 %	50 %
Conspicuous	40 %	80 %	40 %
Innovative	50 %	90 %	40 %
Ethical	50 %	90 %	40 %

# Tempix® temperature indicator



# Ground beef with indicator provided higher value in all dimensions



- PERFORMANCE ● EXPERIENCE
- STATUS VALUE ● RESPONSIBILITY
- OPPOSITE ●

# Ground beef: largest attribute differences between sample ratings (% of participants, n=10)

Minced meat	No indicator	With indicator	Difference
Forerunner	0 %	90 %	90 %
Innovative	0 %	90 %	90 %
Imaginative	10 %	80 %	70 %
Valuable	10 %	80 %	70 %
Delightful	10 %	70 %	60 %
Distinguishable	10 %	70 %	60 %
Conspicuous	10 %	70 %	60 %
Insightful	30 %	80 %	50 %
Respected	50 %	100 %	50 %
Expert	30 %	80 %	50 %
Skilful	30 %	80 %	50 %

# Key takeaways



**Packaging is a very important source of value for the food business and restaurants, the consumer viewpoint should never be neglected.**

**Communicates  
brand values 24/7**

**Increases  
consumer loyalty**

**Increases  
likelihood of  
repurchase**

**Increases  
willingness to pay**

**“Someone has  
clearly considered  
both me and the  
environment.”**



# sense n insight

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