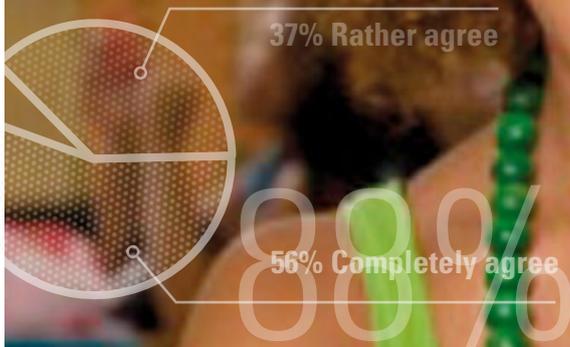


# European consumers prefer paper

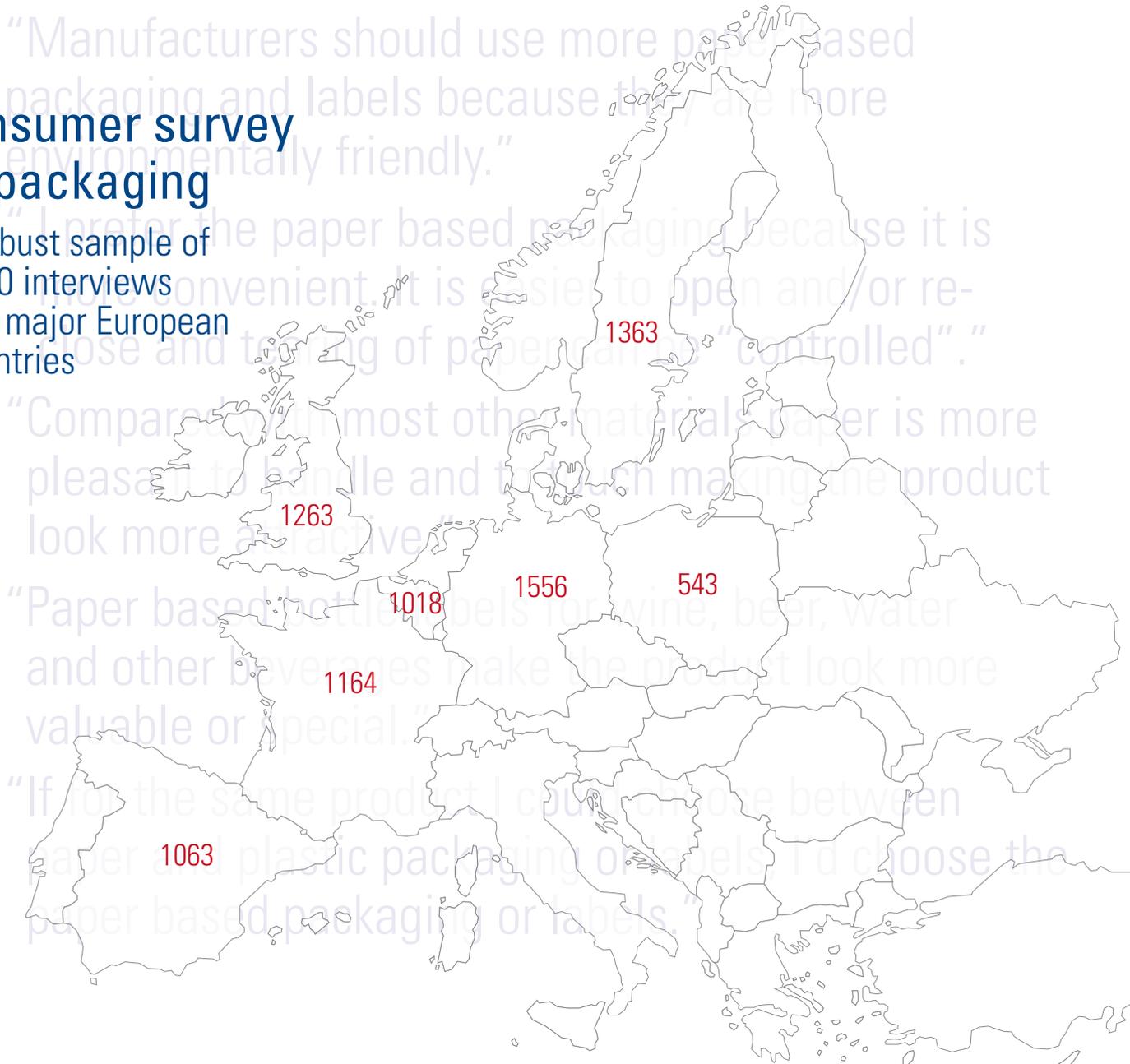
❖ Consumer survey  
on packaging



# A look into the mind of the

## Consumer survey on packaging

a robust sample of  
7970 interviews  
in 7 major European  
countries



# consumer

Faced with a myriad of choices each day, European consumers are not only evaluating products, but also their packaging. Wouldn't it be useful for manufactures to have a glimpse into this decision-making process?

This was the goal of the European Paper Packaging and Paper Labelling Survey. To learn what European consumers really thought about paper as a substrate for labels and packaging.

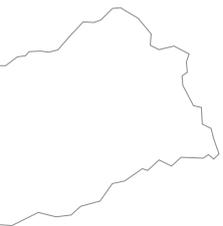
## ACROSS EUROPE PEOPLE PREFER PAPER

In order to get a clear and reliable measurement of consumer's opinions, the survey was designed and carried out during August/September 2006 by Ipsos, a leading global survey-based research company.

Asking five specific questions, nearly 8,000 interviews were conducted in seven major European countries: the United Kingdom, France, Germany, Poland, Spain, Sweden and Belgium. These countries – from the north, south, east and west – represent a wide variety of local social, economic and consumption differences.

Respondents included men and women aged 18 and older. The analysis gives details separately for men and women and for three different age groups.

A clear result emerged from the survey: people like paper. In fact, nine out of ten European consumers would choose paper-based packaging or labels over other substrates. Read on for more details.



# Paper is sustainable

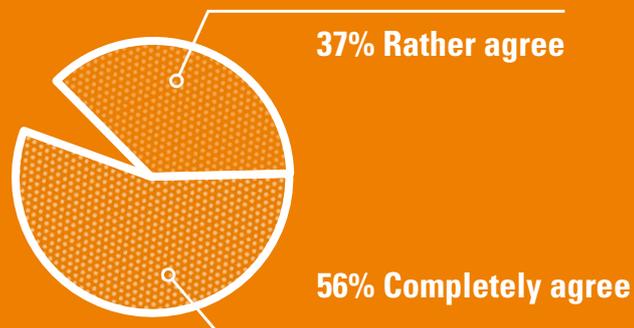
# 93%

of European consumers agree that

manufacturers should use more paper based packaging and labels because they are more environmentally friendly

Consumers react very positively to the **environmentally friendly** aspects of paper. They know that paper is made from a renewable resource, i.e. wood, that it is **biodegradable** and is to a large extent **recycled** after use.

This **ecological concern** is widespread with all countries scoring highly. At the top is Sweden with 96%. Even the lowest rating, 86% for Spain, is remarkably high. Across all age brackets 92% of men and even 94% of women react positively.



## CONSUMERS ARE RIGHT!

Consumers are right to say that paper is friendly to the environment and there are many reasons for that. Paper is not only **biodegradable**, it is also **recyclable** (and actively recycled) and it is produced from a renewable resource, i.e. wood.

More than 90% of all wood needed for the European paper production is harvested in European forests. Because of good forest maintenance and an active replanting programme, the European forests continually grow both in area and wood volume. More and more pulpwood originates from **certified forests**.

Young trees grow by capturing CO<sub>2</sub> from the atmosphere, thus reducing global warming gasses. Wood and products made from wood store carbon dioxide until the end of their life cycle.

## RECYCLING

**Few industries recycle as much as the paper and board industry does:** more than 50% of all fibre material used for paper making in Europe is recovered paper. Obviously, for the packaging of food the industry strictly observes the regulations for hygiene and food contact when selecting its fibre material.

Litter is a regrettable phenomenon, but happily, unlike most other litter, **paper biodegrades** and re-enters the carbon cycle where the creation of wood cells started.

Wood is a renewable resource and forest owners follow a programme of continuous planting and replanting.



Not more than 70% of the annual growth in the European forests is harvested.

Paper is the preferred material to pack gifts and precious purchases.



Double coated crack-resistant paper makes perfect coffee bags.

# Paper is convenient

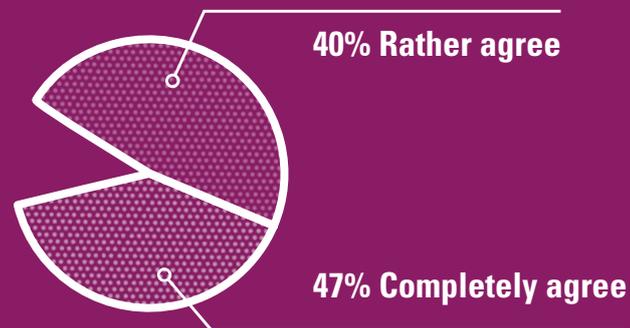
# 87%

of European consumers agree that

paper-based packaging is more convenient. It is easier to open and/or re-close and tearing of paper can be controlled.

The convenience of paper based packaging is considered by respondents as very important. Apparently they find that some of the properties of paper really make life easier.

There is fairly consistent agreement about the convenience of paper across all the countries, ranging from a low in Spain of 79% to a high in Poland of 91%. Women of 55 and older rate the convenience of opening and closing paper packaging particularly high at 91%.



## ADDING CONVENIENCE TO PACKAGING

Surveys have shown that one of the main irritations of consumers is packaging that is difficult to open and leaves little or no possibilities for re-closing. Paper has several practical and predictable characteristics that can add real convenience to packaging. These (all measurable) characteristics are controlled tear, stiffness, dead fold and obviously the various strength properties.

Controlled tear means that one can tear paper just as far as one wants. This can be very useful e.g. when opening a bag of sweets or any other small items that will fall out when the tear goes out of control as easily happens with certain polymer films. When producing packaging papers, "tear strength" is one of the properties that is continuously measured, as are "tensile strength" and "burst strength".

## NO JUMP BACK

Another practical property is "stiffness" which helps to protect the contents and makes a pack stand up. Obviously the degree of stiffness depends on the fibre material used as well as the calliper and the basis weight (per m<sup>2</sup>) of the paper.

Paper stiffness can also be very important for the packing/filling process of many products.

Dead fold of paper means that, once it is folded, it doesn't "jump back". This can be important for the consumer when closing and storing a partly used pack. Also for high-speed packaging processes dead fold can be very important.



Strong bags made from paper are easy to open and reclose.

High stiffness and a superior print surface give both protection and outstanding presentation to delicate biscuits.



Paper adds both rigidity and a perfect print surface to yoghurt cups.

Metallized paper makes practical and easy to open packs for detergents.



# Paper is appealing

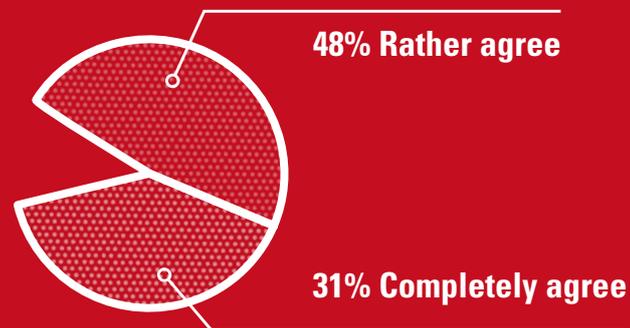
# 79%

of European consumers agree that

compared with most other materials paper is more pleasant to handle and to touch, making the product look more attractive.

The survey clearly shows that a large majority of respondents react very favourably to the tactile qualities of paper. Four out of five Europeans appreciate the way it feels and compliments products.

Although all countries scored above the three-quarter mark, Germany stands out, with 96% agreeing that "paper is more pleasant to handle". Across all ages and countries, men and women respond identically (79%).



## THIS SPECIFIC FEELING

The very specific “feel”, or haptic property of the paper surface, is familiar and comfortable to most people, as are its ‘sound’ and the visual aspects. Made from natural fibres, paper is also a true natural product. Besides cellulose fibres, other important raw materials are kaolin (china clay) and potato based starch.

In the production process paper undergoes different treatments, in order to exactly achieve the specification required for its specific end use. It may be coated on one or both sides to give it improved printability. Besides coating, the way paper is calendared -or not- determines its surface characteristics, which can vary from rough to very smooth and glossy.

## DEVELOPING MODERN PAPER GRADES

When developing modern paper grades, the haptic-optic properties are part of the product design. Current technology allows one paper to differentiate itself from others by the way it is both structured and coated. The structure of the paper surface, e.g. achieved by the topcoat, can give a paper its own specific feel.

The optical properties of paper are equally important. Besides the many shades of white to choose from, paper can be tinted in almost any shade or colour. The different surface structures not only determine the “feel” but also give the visual differentiation to paper. Besides, there are many other techniques to enhance the visual aspects of paper, e.g. by means of embossing or vacuum metallising.

It is so easy to tear open a paper pouch in just the way we want it.



The special texture of paper adds extra pleasure to enjoying chocolates.



Strong grease resistant paper is ideal for attractive and easy to handle pet food bags.

Paper making is a highly automated process but the human factor adds the finishing touch to high quality packaging and label papers.



# Paper adds value

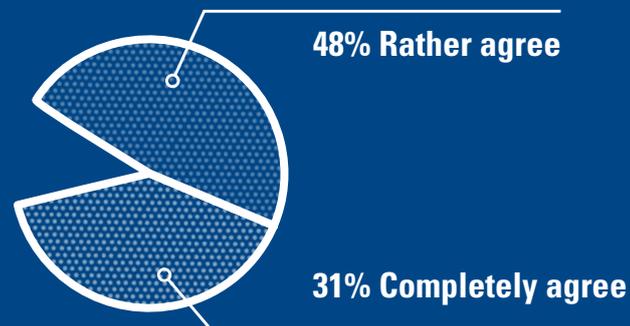
# 79%

of European consumers agree that

paper-based  
bottle labels for  
wine, beer,  
water and other  
beverages make  
the product look  
more valuable or  
special.

The perceived added value that paper labels provide to bottled beverages is high across all countries. One can assume this has a definite impact on purchasing decisions.

It is in Belgium that this perception is strongest (84%). Yet even in the lowest-scoring country, the UK, three out of four people feel that paper-based labels “make the product look more valuable or special.”



## HIGH CLASS

A large majority of consumers find that paper is not only pleasant and convenient; they also see it as a material that adds value or “standing” to the contents and this concerns both packaging and labels.

This observation is confirmed by what everybody can see in the market place. High class department stores and certainly fashion boutiques and perfume outlets pack the valuable purchases in stylish paper based carrier bags before handing them over to the customer.

Similarly we see that higher priced beverages, such as whiskey, champagne and practically all wines have paper based labels. Besides the fact that paper is seen by the consumer and many designers as a more “noble” product, it also has practical advantages.

## EMBELLISHMENT

Paper offers designers and label printers a large choice of ways for what experts call “embellishment”, such as:

- the coated surface can be made matt, satin or glossy
- paper can be embossed with different patterns
- both packaging and label paper are often metallised to give it a gold or silver surface
- luxurious labels can be “hot foil stamped” (applying a gold or silver coloured foil to certain areas).
- holograms
- paper labels can be die-cut in any shape

And last but not least: currently available printing processes offer a host of possibilities to create beautiful packaging or labels from paper.

Wax coated paper supports the maturing process of fine cheeses.



Paper based labels express the class and character of exclusive wines.



Paper gives numerous opportunities to design and produce luxury labels.

Self-adhesive labels made from coated paper add style to beauty products.



# Paper is my choice

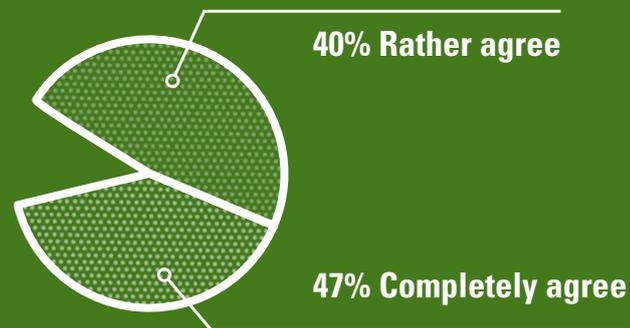
# 87%

of European consumers agree that

if for the same product I could choose between paper and plastic packaging or labels, I'd choose for paper based.

The survey clearly shows that a large majority of respondents react very favourably to the tactile qualities of paper. Four out of five Europeans appreciate the way it feels and compliments products.

Although all countries scored above the three-quarter mark, Germany stands out, with 96% agreeing that "paper is more pleasant to handle". Across all ages and countries, men and women respond identically (79%).



## ECONOMIC ADVANTAGES

While 87% of European consumers clearly expressed a preference for paper based packaging and labels, they may not have taken the economic aspects into account. Besides clear technical and environmental advantages, paper offers brand owners, packers-fillers and print- and packaging producers also considerable economic advantages.

A study made in 2005 and repeated in 2006, covered the entire "chain" including base material costs, the converting process, packaging machinery and the packing-filling process. Besides desk research, more than 100 detailed interviews were made throughout Europe with:

- Paper and film suppliers
- Packaging printers and laminators
- Coating and metallising companies
- Converting equipment suppliers
- Packaging and labelling machine suppliers
- Brand owners, packers-fillers
- Industry consultants

## COSTS EFFECTIVENESS

This study, made by independent industry experts, compared the "end of line" costs for film-based packs or labels with that of paper based packs or labels in an exactly comparable specification. The conclusion was that in many cases film based products are considerably more expensive, for example:

- Pet food bags 19% more expensive (15% in 2005)
- Sachets for dehydrated soups cost 18% more
- Twisted sweet wrappers: + 2%
- Yoghurt pot banderols (wrap around label): 53% (even +69% in 2005)
- Beer bottle labels: Film based self adhesive labels are 253% more expensive than high-quality WS paper based wet-glue labels.



# Europeans prefer paper

## Methodology



### METHODOLOGY

The survey was designed and carried out by Ipsos, a leading global survey-based research company with offices in over 40 countries. Interviews were conducted with representative consumers 18 years and older in each country based on the quota method.

A robust sample of 7,970 interviews was realised in seven major European countries during August/September 2006.

#### Five questions were asked.

Respondents could select from the agreement scale:

Completely agree – Rather agree

Rather disagree – Completely disagree

1. Manufacturers should use more paper-based packaging and labels because they are more environmentally friendly.
2. I prefer the paper-based packaging because it is more convenient. It is easier to open and/or re-close and tearing of paper can be controlled.
3. Compared with most other materials paper is more pleasant to handle and to touch, making the product look more attractive.
4. Paper-based bottle labels for wine, beer, water and other beverages make the product look more valuable or special.
5. If for the same product I could choose between paper and plastic packaging or labels, I'd choose the paper-based packaging or labels.

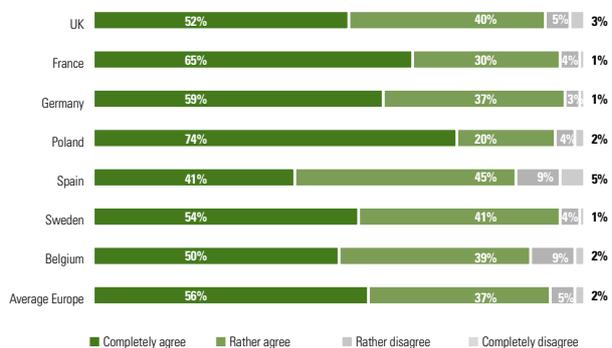
### RESULTS SUMMARY

European consumers massively approve the use of paper in packaging and labelling. If they had the choice for the same product, 87% would choose paper-based packaging or labels rather than those based on other substrates.

As a sign of a solid and long-term consumer expectation, this positive attitude is confirmed in all countries surveyed, where patterns of responses are very close despite local, social, economic and consumption differences.

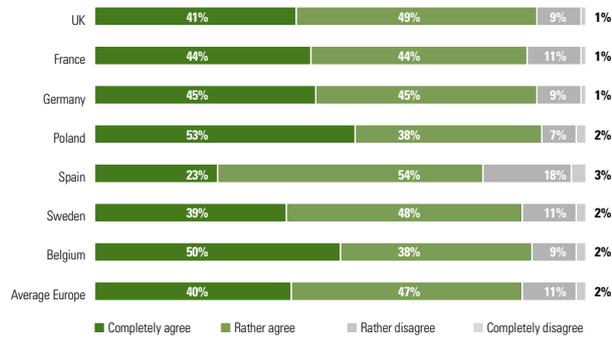
However, even stronger attitudes are clearly identified among European female, senior consumers 55+, and primary shoppers in the households (for convenience reasons mainly). Men focus relatively more on the valuable aspects of the paper packaging and labelling in many countries.

#### Question 1. Paper is sustainable

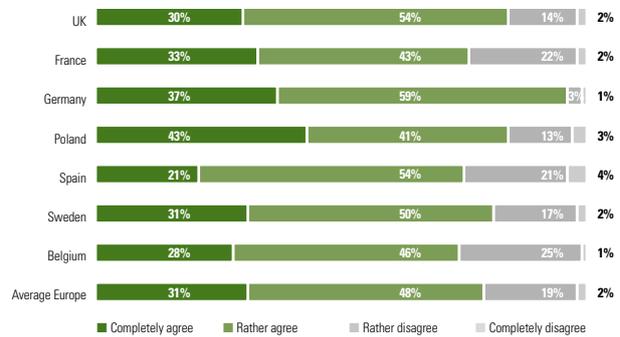


# and results

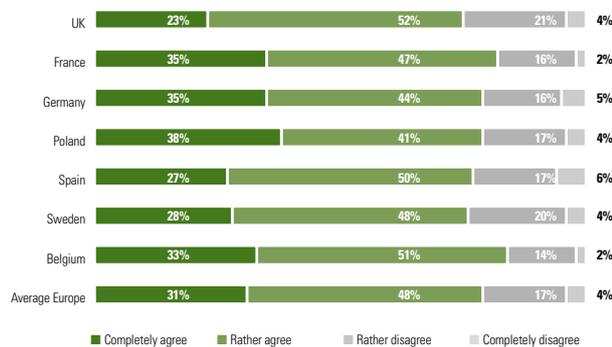
## Question 2. Paper is convenient



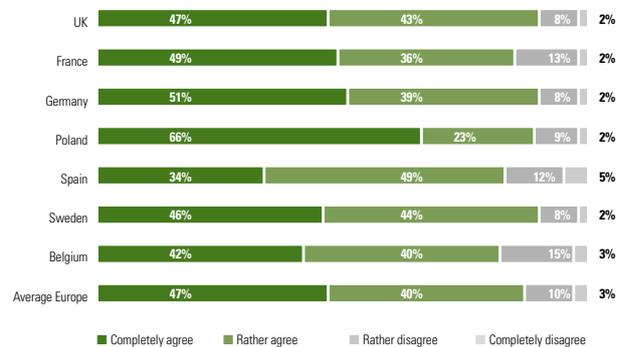
## Question 3. Paper is appealing



## Question 4. Paper adds value



## Question 5. Paper is my choice





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