
2017 Paper & Packaging Consumer Trends Report

Research Overview

What do consumers really want and expect from companies and brands when it comes to paper and packaging products? The Asia Pulp and Paper (APP) 2017 Paper & Packaging Consumer Trends Report explored just this to gain insight into consumers’ thoughts and preferences when it comes to paper and packaging products. The research specifically looked at the importance of sustainability for paper, food packaging and delivery packaging, and how it influences consumer purchasing behavior.

Part 1: The Importance of Sustainability

U.S. Report Findings

When it comes to environmental issues, the following are important to U.S. consumers:

- 74 percent: Human rights
- 66 percent: Waste water
- 63 percent: Food waste
- 56 percent: Carbon emissions
- 51 percent: Packaging waste

Q: How important are each of the following environmental issues to you?

- 58 percent of consumers indicate they are confident in their ability to decipher what can and cannot be recycled.

- 31 percent of consumers are likely to shop with a brand that offers products in packaging that is sustainable.

- 29 percent of consumers said it is important that the paper used to print magazines and book I read have sustainable attributes and/or certifications.

- 27 percent of consumers noted when purchasing paper or packaging products, I look for products that have sustainability attributes.

- 25 percent of consumers are willing to pay more for paper or packaging products that have sustainable attributes/are made from recycled materials.

Q: Please indicate how much you agree or disagree with these statements.
Among those U.S. consumers who indicated a willingness to pay more for paper or packaging products that have sustainable attributes:

52 percent are willing to pay more than 10 percent more for such products
28 percent are willing to pay 21 – 30 percent more for such products

Millennials are the most likely of all groups – and twice as likely as Baby Boomers – to pay 21 – 30 percent more for these products. Three in 10 millennials (29 percent) indicated a willingness to pay 30 percent more for products that are sustainable.

Canadian Report Findings

When it comes to environmental issues, packaging waste is considered an important environmental issue by seven in ten Canadians:

- 81 percent: Human rights
- 74 percent: Food waste
- 73 percent: Waste water
- 71 percent: Packaging waste
- 67 percent: Carbon emissions

This is particularly true of older respondents aged 55 and older, as well as residents of Quebec.

Q: How important are each of the following environmental issues to you?

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Seven in 10 Canadians expresses confidence in their ability to decipher what can and cannot be recycled, especially those aged 45 and older.

At least four in 10 consumers seek out products with sustainable attributes or certifications when shopping.

Q: Please indicate how much you agree or disagree with these statements.

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One-third of respondents agree they are willing to pay more for products with these sustainable attributes:

- 56 percent: Pay one to 10 percent more
- 21 percent: Pay 11 to 20 percent more
- 22 percent: Pay 21 to 30 percent more

Respondents aged 18-44 are the most likely to say they would spend over 10% more for products with these attributes, while those aged 65 and older are the least likely.

Q: As a percentage, how much more are you willing to pay for paper and packaging products that have sustainable attributes/are made from recycled materials?
When purchasing paper or packaging products, consumers rank the importance of sustainable attributes of the products:

- 56 percent: Made from recycled materials
- 48 percent: Made from sustainable forests
- 48 percent: Made from renewable fiber sources
- 41 percent: Has sustainable certifications

Q: How important are the following attributes when purchasing paper or packaging products?

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Compared to five years ago, the sustainability of paper-based packaging today is either much more or more important to two-thirds of all respondents (65 percent).

Usage of paper products is high, with 91 percent of Canadians saying they print out documents on photo copy paper for personal or professional use.

Roughly half (48 percent) do so once a week or more often, with those aged 18-54 doing so the most frequently.

Q: How important is the sustainability of paper-based packaging (e.g., cardboard) to you today compared to five years ago?

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Part 2: Sustainability in Food Packaging

U.S. Report Findings

When it comes to food packaging in restaurants and grocery stores, consumers rank the importance of sustainable attributes of the products:

- 67 percent: Quality
- 55 percent: Recyclability
- 52 percent: Sustainability
- 52 percent: Biodegradability
- 39 percent: Made from deforestation-free sources

Q: How important are each of these factors to you when it comes to food packaging in restaurants (fast food and quick serve) and grocery store food items (e.g., cereal boxes, frozen food, quick service food wrappers, disposable coffee cups)? (Respondents answered “very important” or “somewhat important”)

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Nearly half (46 percent) of consumers agree that the sustainable attributes of food packaging are important.
48 percent of consumers want fast food/quick serve restaurants to make it clearer which packaging items/containers can and can’t be recycled

45 percent of consumers want to understand what food packaging items can and can’t be recycled

45 percent of consumers want restaurants and food product brands to offer packaging that is biodegradable as an alternative for food packaging that cannot be made recyclable

38 percent of consumers want restaurants and food product brands to provide information on the label about the packaging’s sustainable attributes and recyclability

Q: Please indicate how much you agree or disagree with the following statements. (Respondents answered “strongly agree” or “somewhat agree”)

When buying products in the supermarket, consumers feel the following information should be available on the label:

43 percent: Information about how to recycle the package
33 percent: Carbon footprint of the product
32 percent: Sustainability credentials of the packaging

Q: When buying a product in the supermarket, how important to you is availability of this information on the label? (Respondents answered “very important” or “somewhat important”)

Canadian Report Findings

When it comes to food packaging in restaurants and grocery store food items, consumers rank the importance of sustainable attributes of the products:

76 percent: Recyclability
72 percent: Biodegradability
71 percent: Quality
64 percent: Sustainability
55 percent: Made from deforestation-free sources

Respondents aged 65 and older are the most likely to rate these factors high in importance, and particularly more so than 18 to 44 years old.

Q: How important are each of these factors to you when it comes to food packaging in restaurants (fast food and quick serve) and grocery store food items (e.g. cereal boxes, frozen food, quick service food wrappers, disposable coffee cups)?

Canadians agree that:
68 percent: Fast food/quick service restaurants need to make it clearer which packaging items/containers can and cannot be recycled

66 percent: Restaurants and food product brands should offer biodegradable packaging as an alternative to non-recyclable food packaging

65 percent: Sustainable attributes of food packaging are important to them

Those 65 and older are more inclined than their younger counterparts to agree with all of these statements.

Q: Please indicate how much you agree or disagree with the following statements. (Respondents answered “strongly agree” or “somewhat agree”)

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When buying a product in the supermarket, consumers feel the following should be available on the packaging:

62 percent: Information about how to recycle the packaging
47 percent: Sustainability credentials of the packaging

The availability of this information on the product label is most important to those aged 65 and older.

Q: When buying a product in the supermarket, how important to you is availability of this information on the label?

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**Part 3: Sustainability in E-Commerce**

**U.S. Report Findings**

Today, the speed and convenience of ordering online has meant increased at-home delivery of items previously purchased in person, such as groceries and other household items.

37 percent of Americans have had household items such as groceries, cleaning supplies, etc. delivered to their home via mail, to varying degrees of frequency:

- A few times a year: 12 percent
- Every few months: 6 percent
- Once a month: 6 percent
- A few times a month: 6 percent
- Once a week: 4 percent
- More than twice a week: 3 percent

Generational Breakout: Items delivered at least once a month
- 29 percent: Millennials
21 percent: Generation X
9 percent: Baby boomers

Q: On average, how often do you have household items such as groceries, cleaning supplies, etc. delivered to your home via mail?

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52 percent of consumers agree the packaging of the items delivered are often much larger than the item itself

48 percent of consumers think stores need to do a better job of sending delivery items in packaging that better fits the products size and reduce waste

41 percent of consumers agree it’s important that the packages delivered should come in sustainable, recyclable or environmentally friendly packaging

33 percent of consumers agree the availability of next-day or free delivery contributes to more packaging waste because it encourages shoppers to order more frequently

18 percent of consumers believe that shopping online is better for the environment than shopping in stores

Q: Please indicate how much you agree or disagree with these statements (responses above indicated “strongly agree” or “somewhat agree”

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Canadian Report Findings

Household items such as groceries, cleaning supplies, etc., have been delivered to 36 percent of respondent’s homes via mail. On average:

- 16 percent receive deliveries once a month or more often
- 19 percent have household items delivered every few months or less often

The younger the age, the more common home deliveries are

Q: On average, how often do you have household items such as groceries, cleaning supplies, etc., delivered to your home via mail?

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When ordering packages, consumers felt that:

- 62 percent: Stores need to do a better job of sending delivery items in packaging that better fits the product’s size
- 60 percent: Deliveries need to come in sustainable, recyclable or environmentally friendly packaging
58 percent: Packaging of delivery items are often much larger than the item itself

20 percent: Shopping online is better for the environment than shopping in stores

Those 45 and older are also more likely to agree that stores should do a better job of using packaging that fits the product and reduce waste. Respondents aged 18-44 years old more predominantly believe that online shopping is better for the environment than shopping in stores.

Q: Please indicate how much you agree or disagree with the following statements.

Methodology

U.S.
This report presents the findings of an online survey conducted among a representative sample of 1,015 U.S. adults 18 years of age and older, 505 males and 510 females. The study was fielded using ORC International’s twice-weekly Online CARAVAN® Omnibus Survey and was ‘live’ during the period June 1-4, 2017.

Respondents were members of an online panel and had agreed to participate in online surveys and polls. As such, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including but not limited to sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments.

Completed interviews are weighted by five variables – age, sex, geographic region, race and education – using data from the U.S. Census Bureau to help ensure reliable and accurate representation of the total U.S. population, 18 years of age and older.

Canada
This report presents the findings of a survey conducted among a Canadian sample of 1,000 adults comprising 500 men and 500 women. The study was fielded using ORC International’s Online International CARAVAN® Omnibus Survey and was ‘live’ during the period June 2-7, 2017.

The online omnibus study is conducted once a week among a census representative (age, gender, region) Canadian sample of 1,000 adults 18 years of age and older. Approximately 75 per cent of the interviews are conducted in English and 25 per cent in French.

Completed interviews are weighted by three variables – age, sex and geographic region – to ensure reliable and accurate representation of the total Canadian population, 18 years of age and older.

Respondents were members of an online panel and had agreed to participate in online surveys and polls. As such, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including but not limited to sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments.