



SUMMARY REPORT: A CONSUMER BEHAVIOURS STUDY



KANTAR

UNDERSTANDING ATTITUDES TOWARDS SUSTAINABILITY IN FRESH FISH PACKAGING

Delving into shopper awareness and key attitudes towards Prevented Ocean Plastic™, and how we can help shoppers make better choices



A Kantar LinkQ Project for
Bantam Materials UK Ltd.





Key Objectives

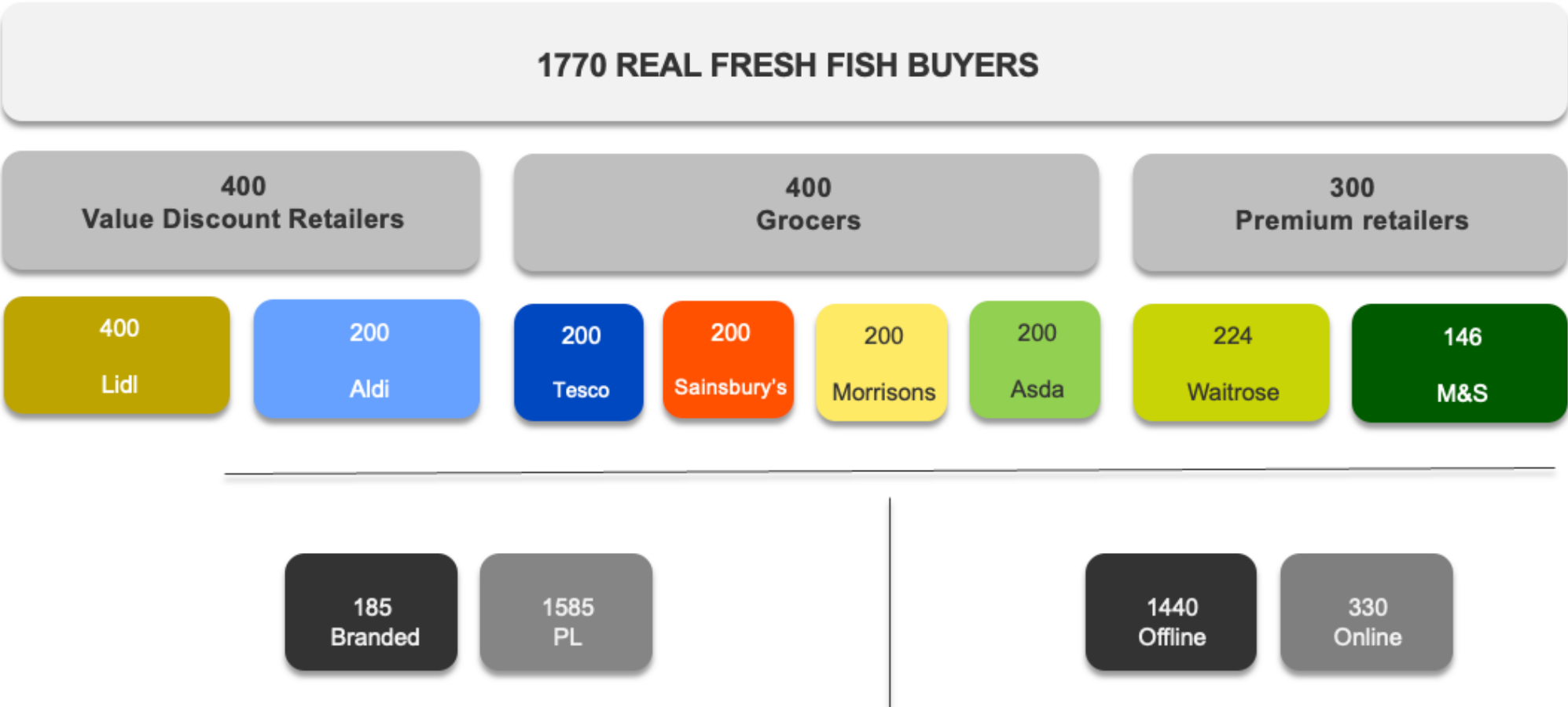
01 Understand consumer perceptions, attitudes and behaviours when it comes to sustainable shopping

Pg.5

02 Understand consumer awareness and perceptions of Prevented Ocean Plastic

Pg.10

Our sample: Real Fresh Fish shoppers across all the major supermarkets, based on a recent purchase they have made



Who is the Fresh Fish shopper? They tend to be more affluent, older, live smaller households

Class AB



i131

Aged 65+



i133

1&2 Person HH



i116



Agenda

- 01** Understand consumer perceptions and behaviours when it comes to sustainable shopping
- 02** Understand consumer awareness and perceptions of Prevented Ocean Plastic

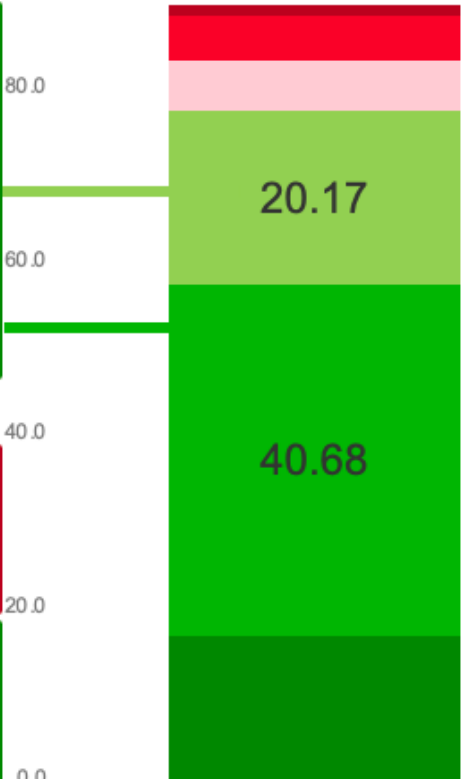
Gauging opinions about plastic: 60% want to make better plastic choices.

Which of the below statements most reflect your opinion toward buying products packaged in plastic from grocery stores.

60.8%
Seeking
better plastic
choices

Not willing to make
changes
12.2%

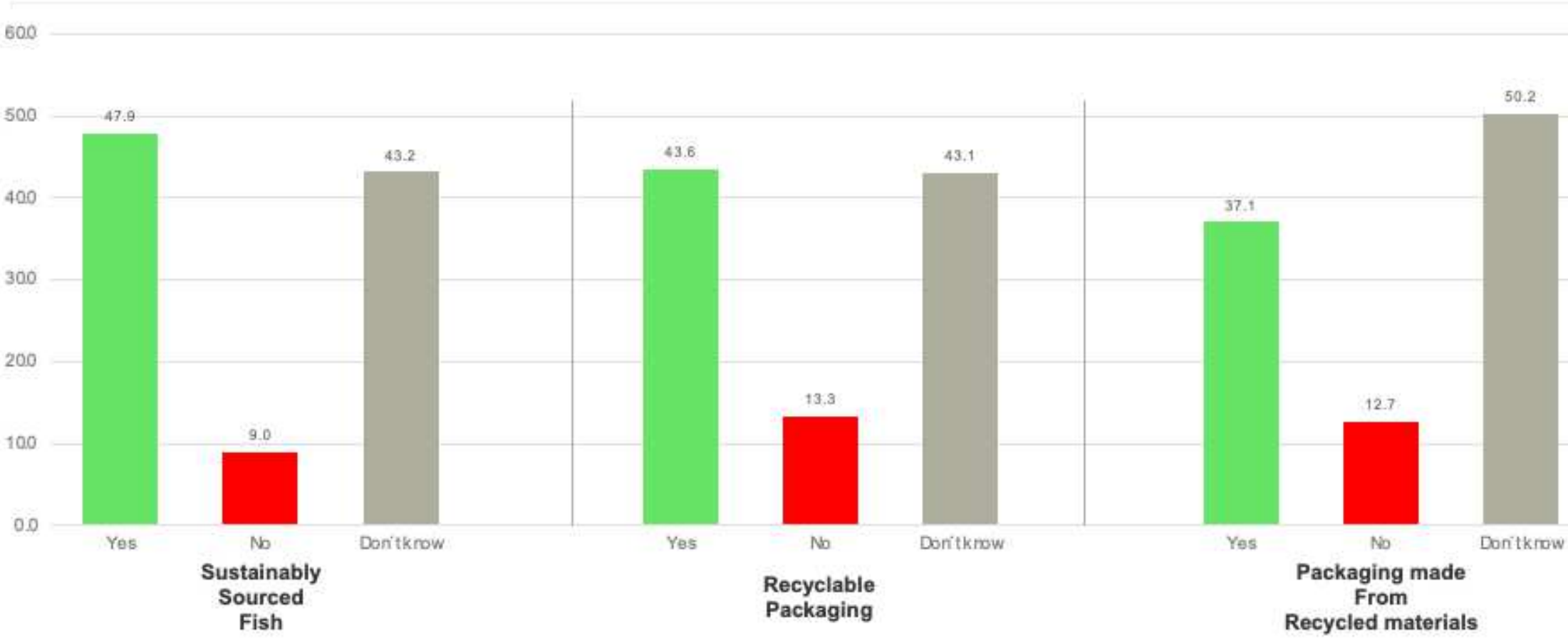
Willing to make
changes
77.5%



- I don't think plastic waste is a significant issue and shoppers shouldn't have to change their shopping habits
- I don't think about plastic packaging waste, and it doesn't impact my purchasing decisions at all
- I don't know much about whether plastics are good or bad for the environment, and don't know how shoppers would make the best choice
- Some plastics are worse for the environment than others, and shoppers should seek to make the best choice they can
- All plastic packaging is bad for the environment, however it's not realistic to avoid buying it entirely so shoppers should seek to make better choices
- All plastic packaging is bad for the environment and should always be avoided by shoppers

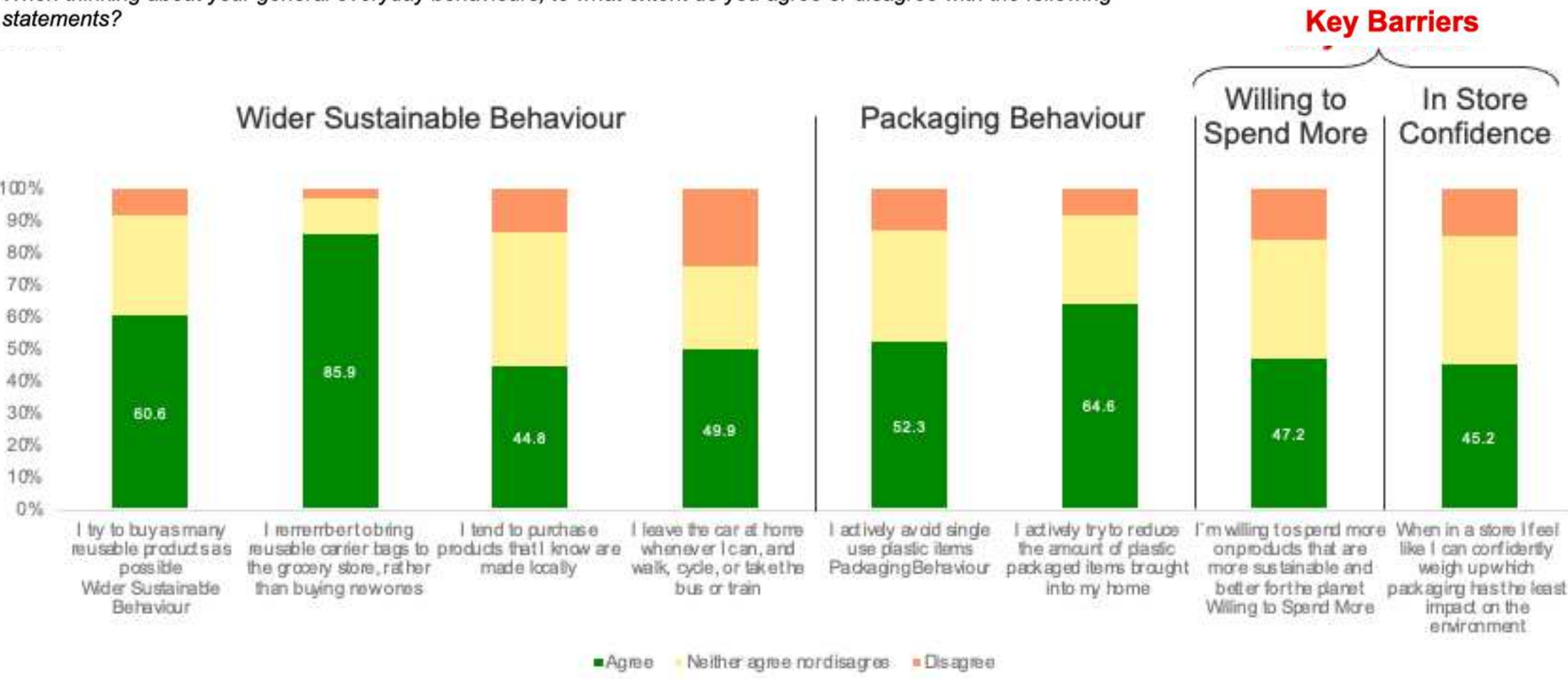
There remains a clear lack of understanding/ awareness of sustainable product features on pack.

Do you know if this product has any of the following features?



More than half cannot confidently weigh up which packaging has the least impact on the environment.

When thinking about your general everyday behaviours, to what extent do you agree or disagree with the following statements?



Weighing up which packaging is better for the environment is even more difficult online.

When thinking about your general everyday behaviours, to what extent do you agree or disagree with the following statements?

“When in a store I feel like I can **confidently** weigh up **which** packaging has the **least** impact on the **environment**”

Percentage of
Respondents that
Agree

Online



37.9%

Offline



46.9%

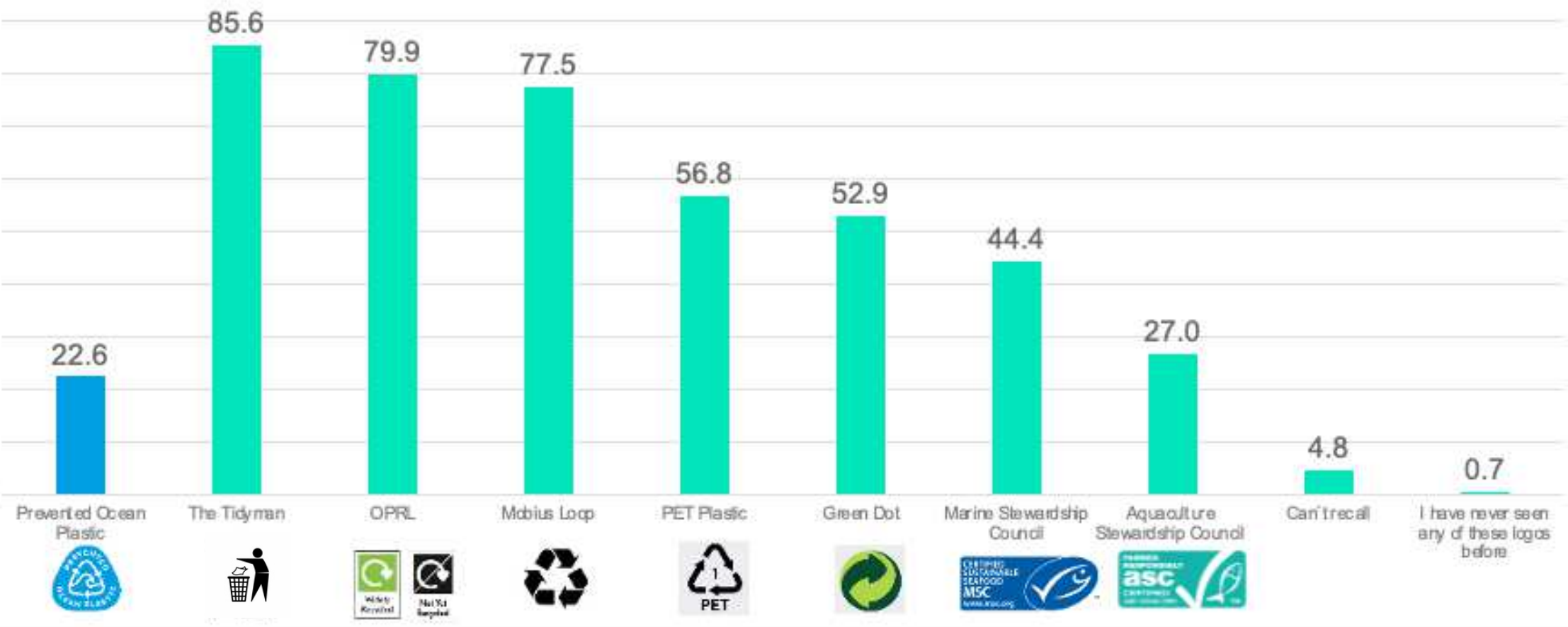


Agenda

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- 02** Understand consumer awareness and perceptions of Prevented Ocean Plastic

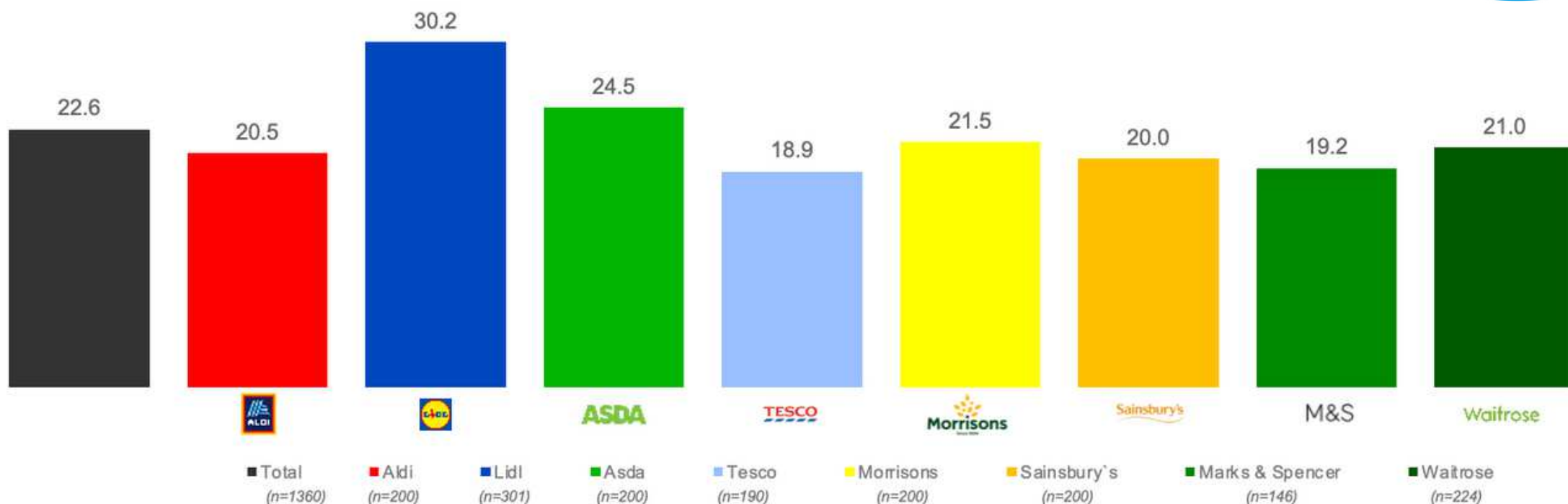
When it comes to logo awareness, 23% of participants had seen the POP logo before.

Have you ever seen the following logos before?



Shoppers from Lidl are most likely to be aware of the logo, followed by Asda.

Have you ever seen the following logos before?

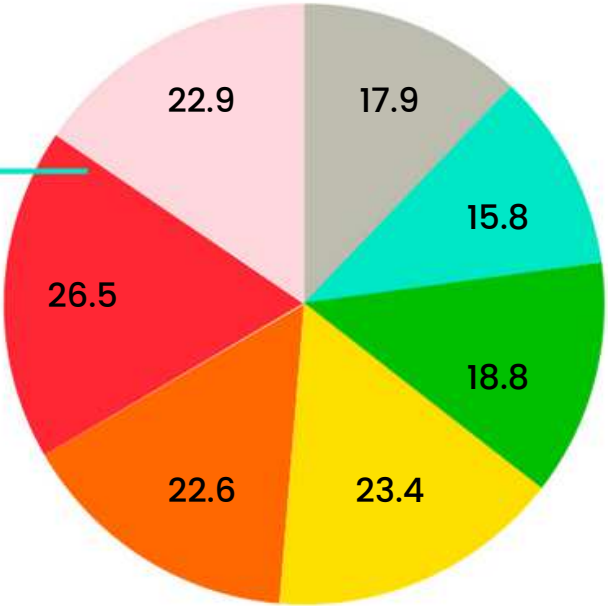


Those from later life stages have higher awareness of the POP logo.

Have you ever seen the following logos before?

Older Life stages showed higher awareness than Younger Life stages of recognising the POP logo



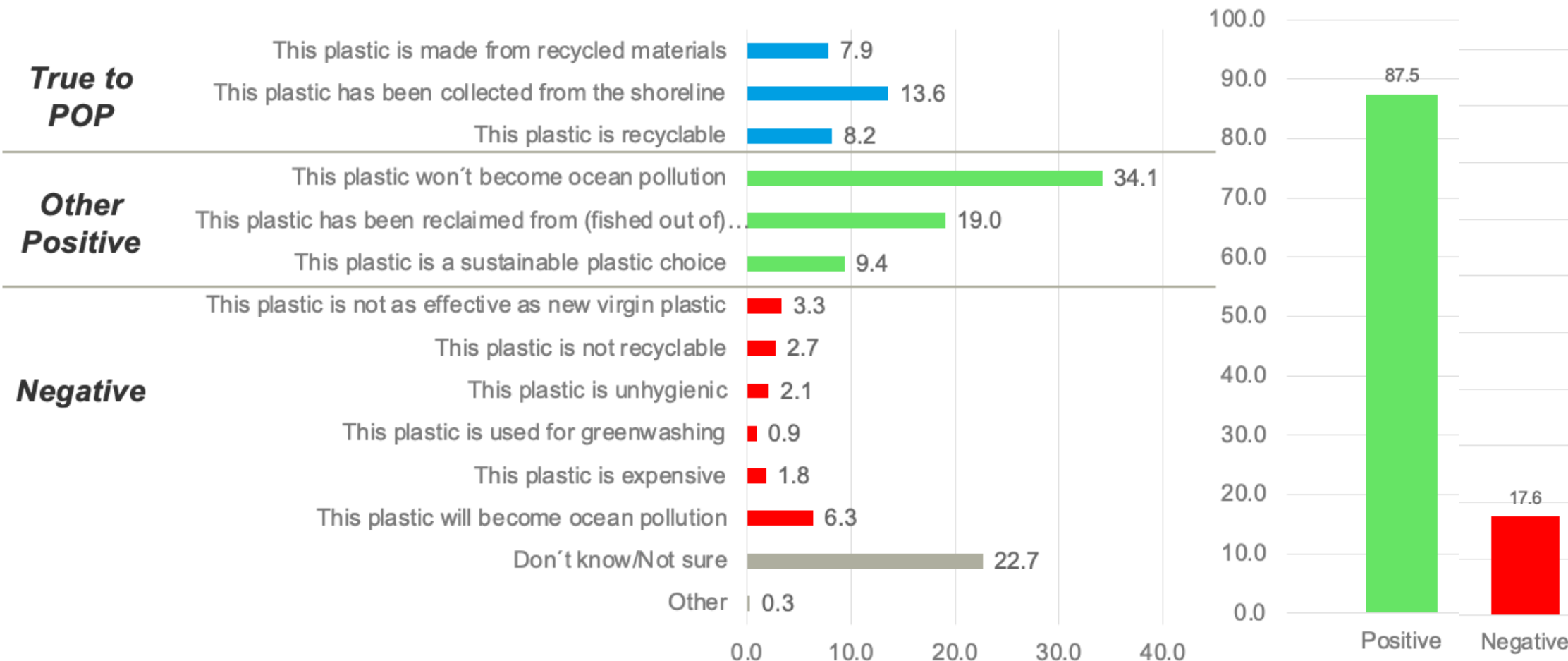


- Pre-Family
- Young Family 0-4 Years
- Middle Family 5-9 Years
- Family 10+ Years
- Older Dependents
- Empty Nesters
- Retired

90% had positive associations with the logo. 20% are unsure of its meaning.

You told us that you had seen the Prevented Ocean Plastic logo before.

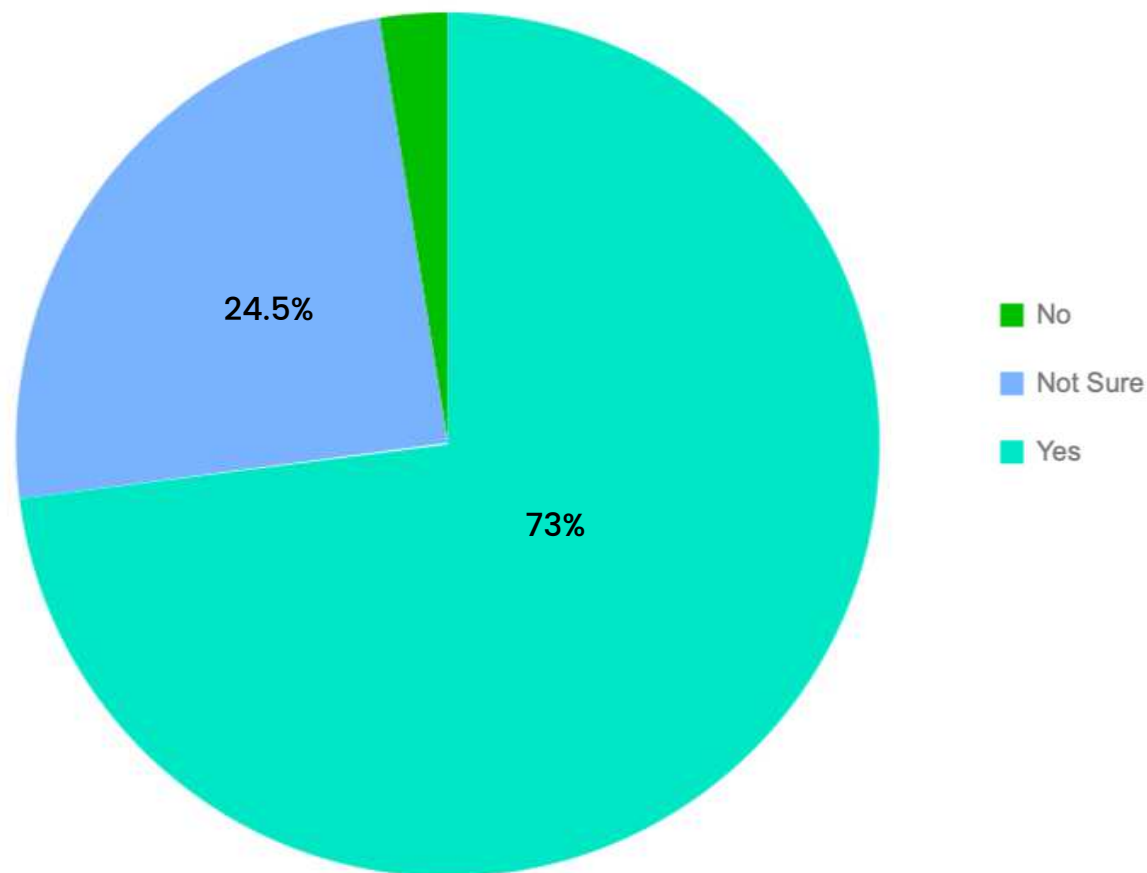
Which of the below words best describe what this logo means to you when on plastic packaging?



73% are interested in purchasing POP packaged products in the future

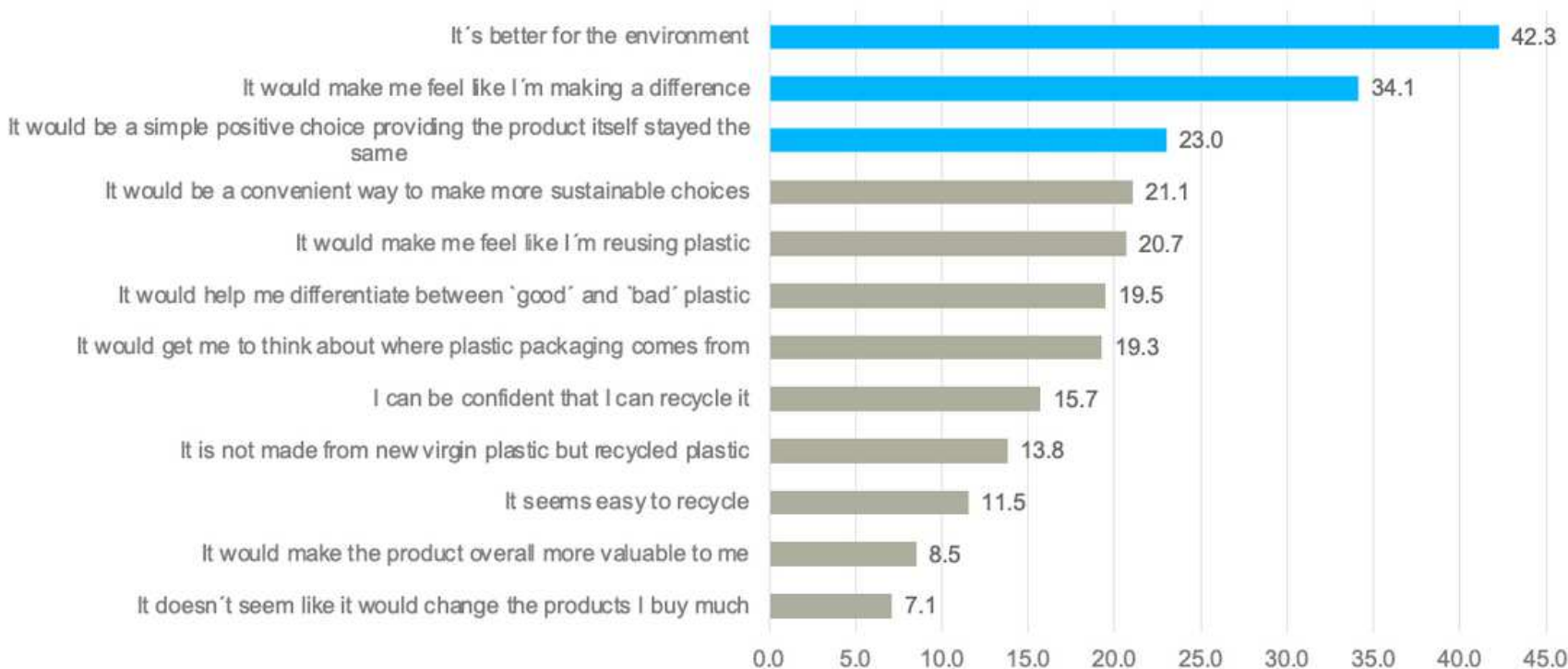


“With this description in mind, and assuming the product would be a similar cost to your current choice, would you be interested in purchasing chilled fresh fish products packaged in Prevented Ocean Plastic?”



Of the 73% that said they would buy POP, their main reasoning shows that it's better for the environment and they would be making a difference, and it's a simple positive choice.

You told us you would consider buying chilled fresh fish packaged in Prevented Ocean Plastic. Why is this?



73% of respondents said they would buy fish packed in POP (Q11a)

Simple & Positive messaging of being better for the environment and making a difference.

An easy win for shoppers!

And for those not sure if they would buy POP, they were not sure why!

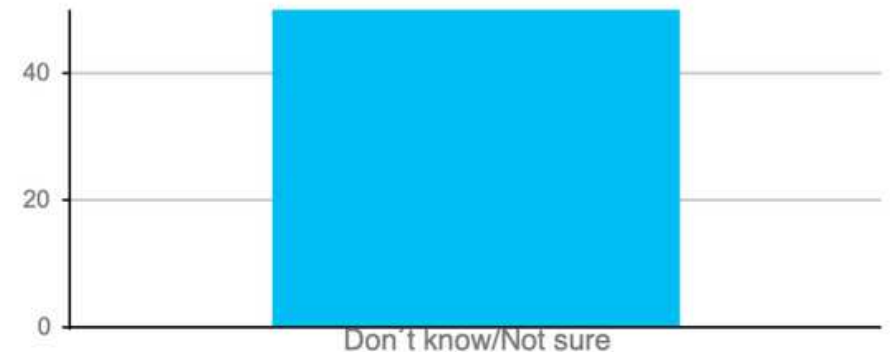
You told us you weren't sure if you would buy chilled fresh fish packaged in Prevented Ocean Plastic. What, if anything, would prevent you from considering this?

Of the 24.5% of respondents who said they **were not sure if they would buy** fish packed in **POP** (Q11a)



50.3%

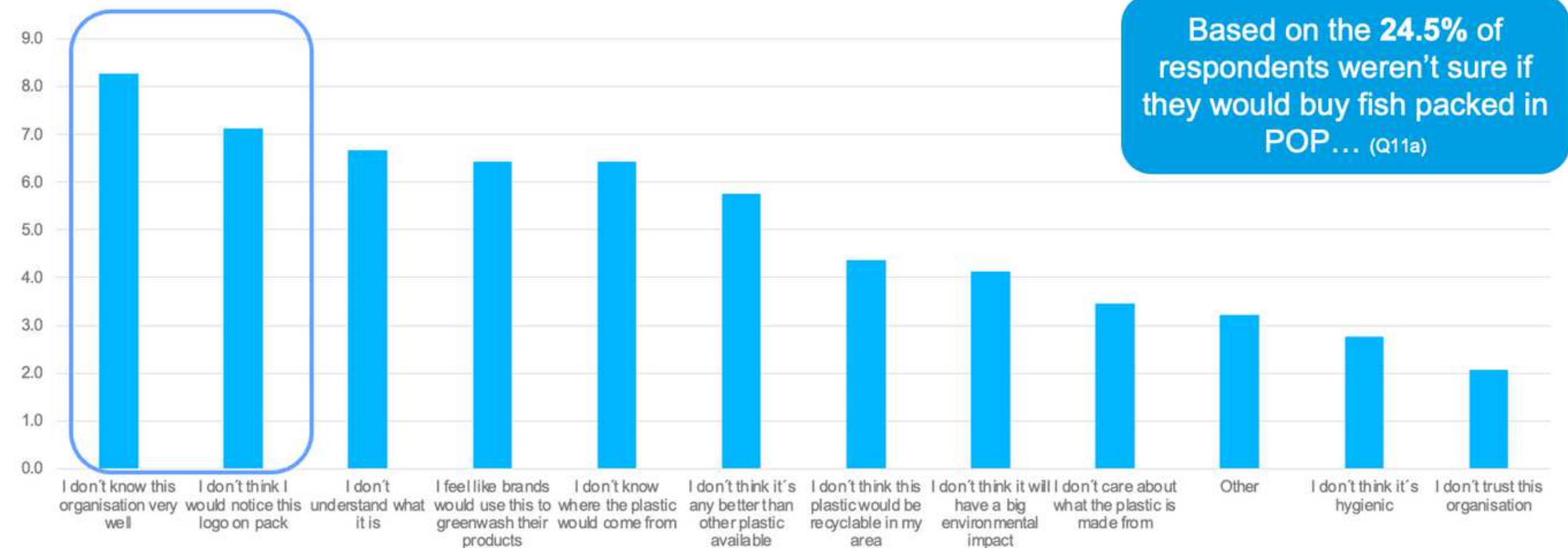
of respondents who weren't sure if they would buy fish packaged in POP **did not know why**



Further education on POP's brand values will help convert those who were unsure if they would buy chilled fresh fish in POP, alongside more pack visibility

You told us you weren't sure if you would buy chilled fresh fish packaged in Prevented Ocean Plastic.

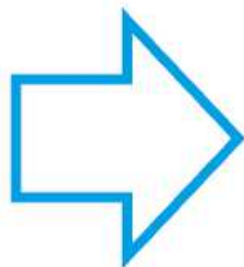
What, if anything, would prevent you from considering this?



And for the small group who wouldn't buy POP packaged fish, they again weren't sure why

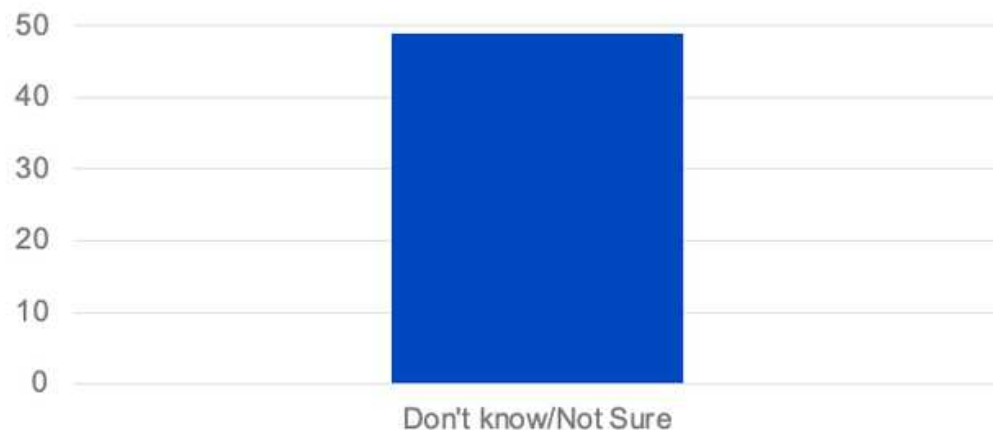
You told us you would not buy chilled fresh fish packaged in Prevented Ocean Plastic. What, if anything, would prevent you from considering this?

Of the 2.5% of respondents who said they **would not buy** fish packed in **POP** (Q11a)



48.9%

of respondents who would not buy fish packaged in POP **did not know why**

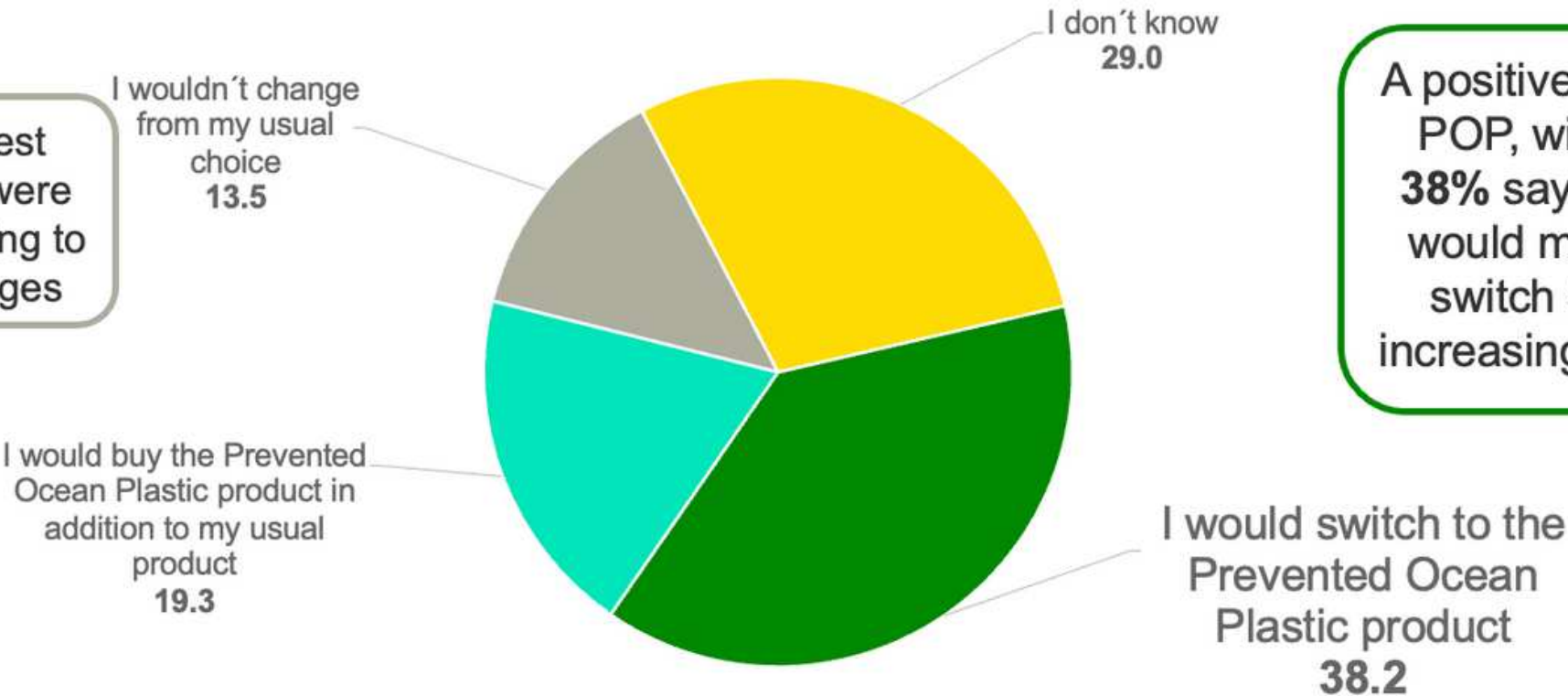


58% of Shoppers would be willing to change their purchasing behaviour to POP, but there is still 29% that are unsure.



If Prevented Ocean Plastic had been available in this store for a comparable product to this product how would you respond?

The smallest proportion were those unwilling to make changes



A positive story for POP, with over **38%** saying they would make the switch & **19%** increasing baskets

Key Takeaways

- 01** Fresh fish shoppers want to make better plastic choices are open and willing to make changes.
- 02** There are barriers to achieving this. Consumers currently lack the confidence and ability to make sustainable shopping decisions at the point of purchase – and this is even harder online.
- 03** 23% are familiar with the Prevented Ocean Plastic logo, purchase intent is high, and there are no real barriers to the brand, but there is still some education required to better inform consumers about Prevented Ocean Plastic.





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