

Friends
of Glass



InSites Consulting



GLASS HEALTH PR SURVEY

EXPLORING CONSUMER ATTITUDES
RELATED TO PACKAGING AND
FOOD AND DRINK SAFETY

MARCH 2014












Online survey in 11 EU countries.

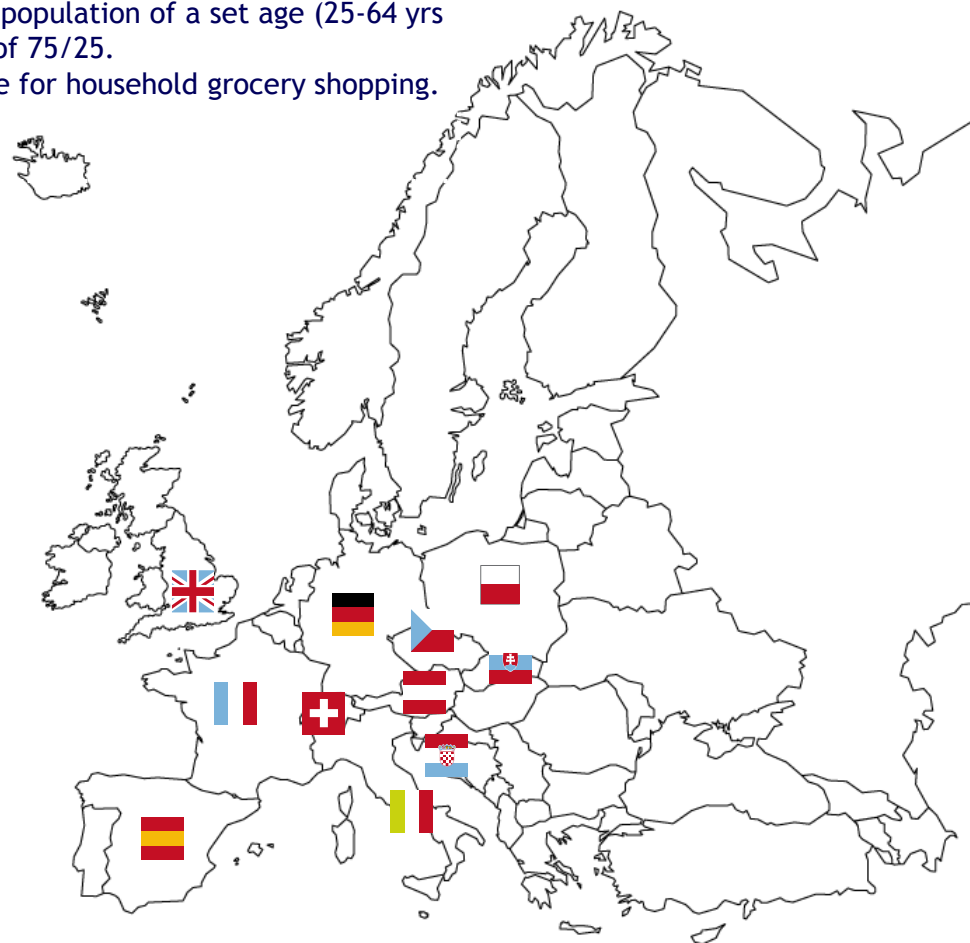
Sample size of $n=1.000$ for tier 1 countries and $n=500$ for tier 2 countries

In all countries, the sample is representative for a country population of a set age (25-64 yrs old). For gender split, we have a female/male distribution of 75/25.

All consumers participating in the survey are (co)responsible for household grocery shopping.

Field period: 24th February- 7th March 2014

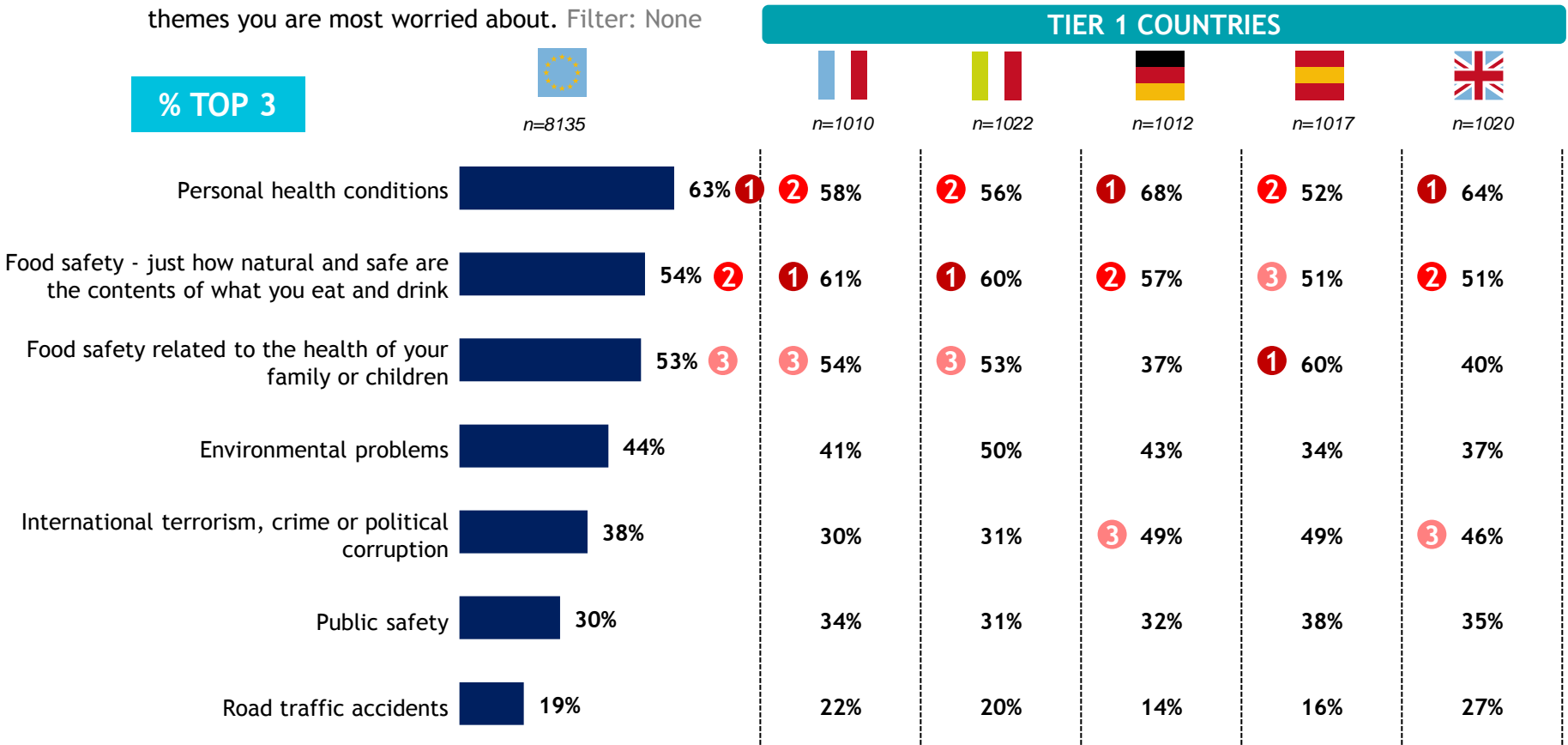
	Country	Sample size
TIER 1	 France	$n=1010$
	 Italy	$n=1022$
	 Germany	$n=1012$
	 Spain	$n=1017$
	 UK	$n=1020$
TIER 2	 Austria	$n=510$
	 Croatia (*)	$n=511$
	 Czech Republic	$n=507$
	 Poland	$n=508$
	 Slovakia	$n=507$
	 Switzerland	$n=511$



(*) Croatia is the only country not included in the 2011 survey

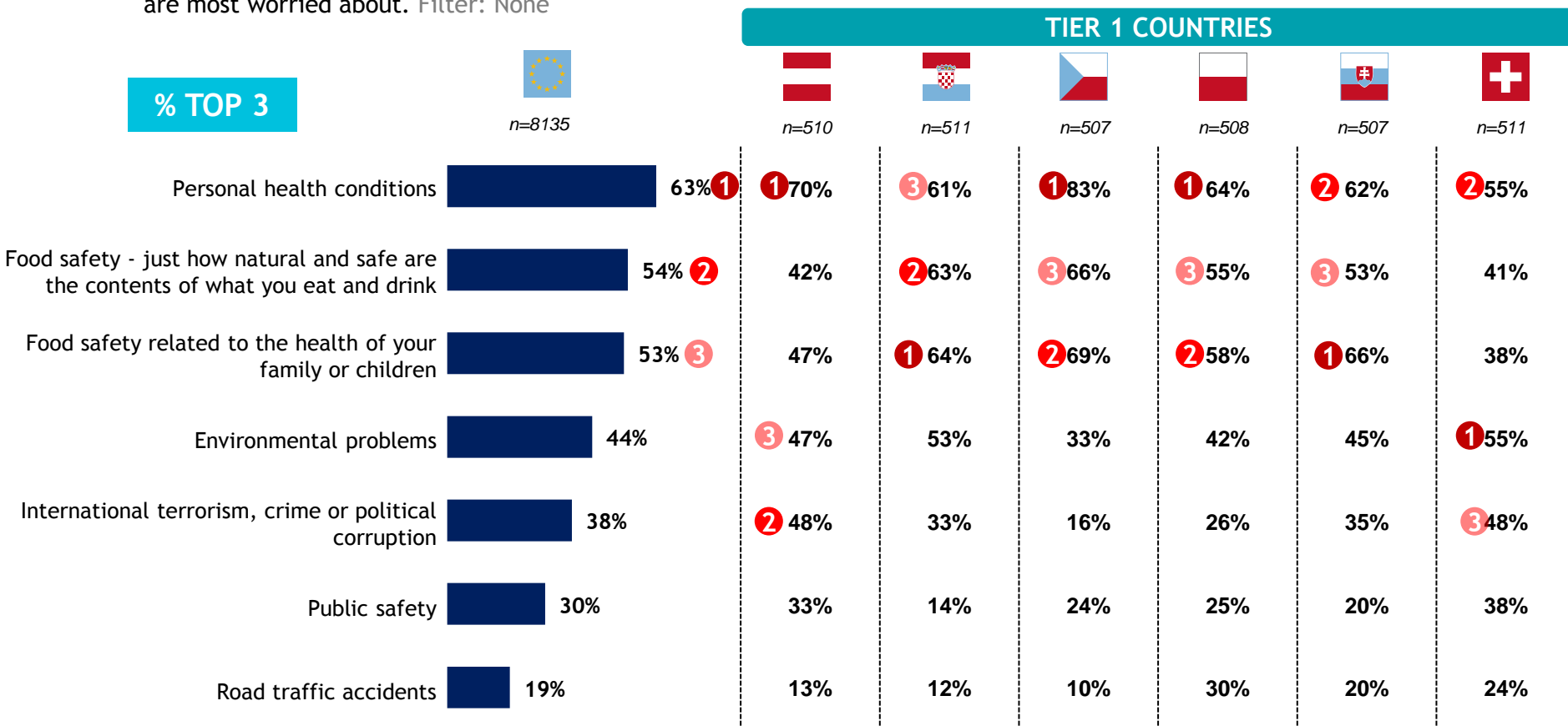
For Tier 1 countries, consumers in France, Italy and Spain worry most about food safety

Q: We know people often worry about the economy or personal finances. Below we have listed some more themes and topics that people are concerned about in their daily life. Please indicate which three of these themes you are most worried about. Filter: None



For Tier 2 countries, daily food worries are highest in Czech Rep., Croatia and Slovakia

Q: We know people often worry about the economy or personal finances. Below we have listed some more themes and topics that people are concerned about in their daily life. Please indicate which three of these themes you are most worried about. Filter: None

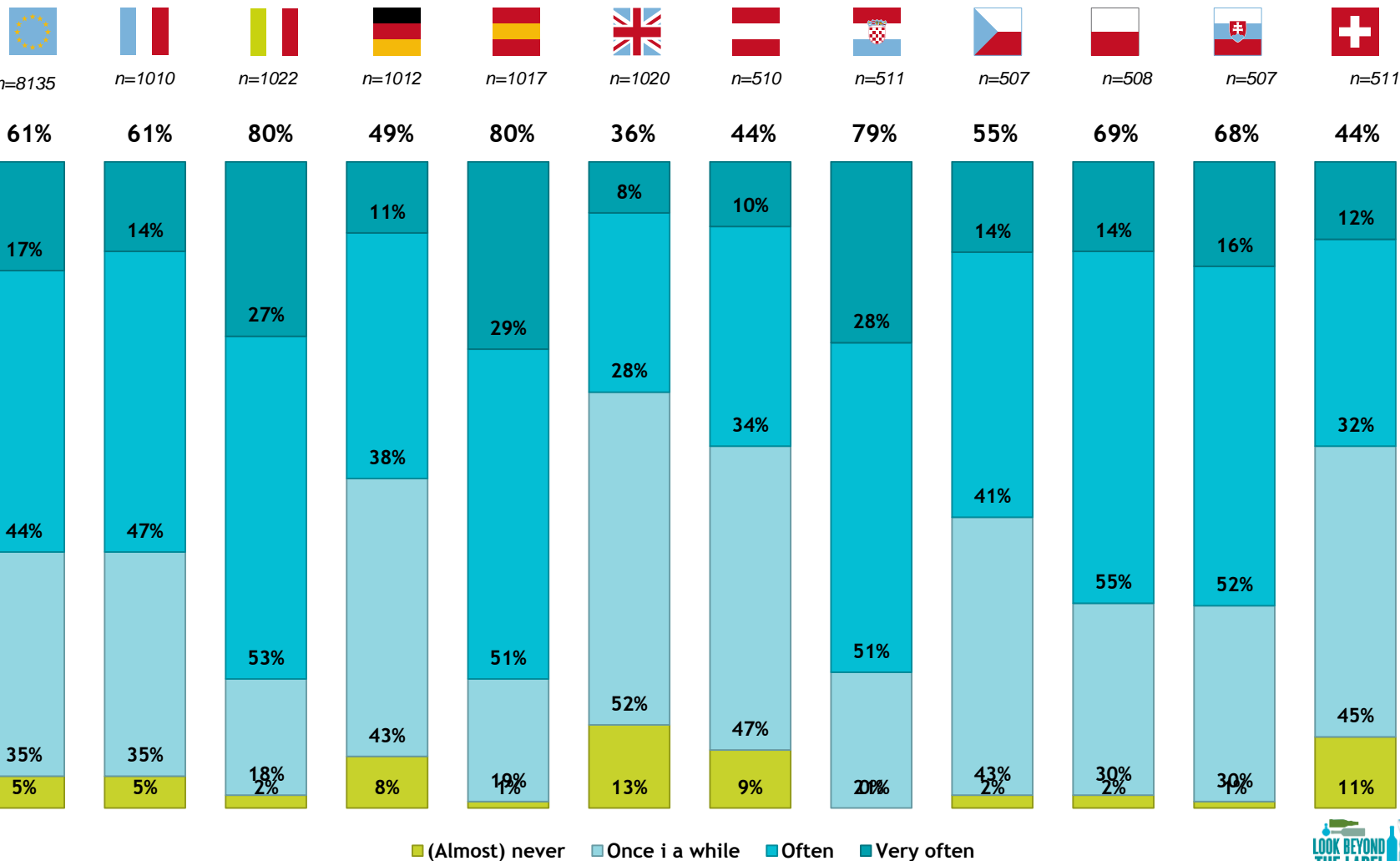


FOOD SAFETY WORRIES

Spanish, Italian and Croatian consumers most often worry about food safety.

Q: How often do you worry about food safety in general?

Filter: None





**EUROPEAN PARENTS
ARE HIGHLY WORRIED
ABOUT FOOD SAFETY
RELATED TO THEIR
CHILDREN.**

4 out of 10 EU parents worry very often about food safety related to children. Parents with young children are most worried, nearly 9 out of 10 young parents are often worried.

EU consumers regularly worry about both contamination and tampering/food fraud

Q: To what extent do you worry about each of the following aspects of food safety? | Filter: None

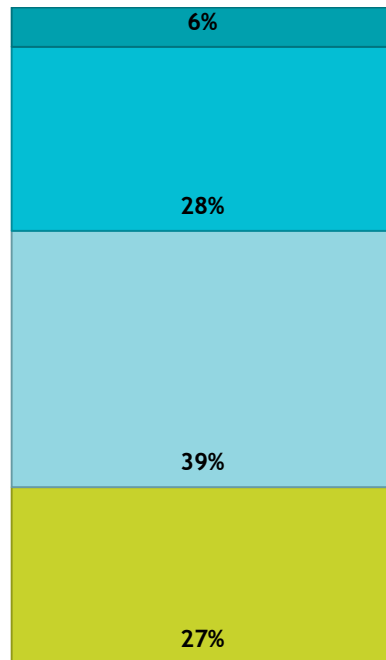


n=8135

A lot & to
some extent

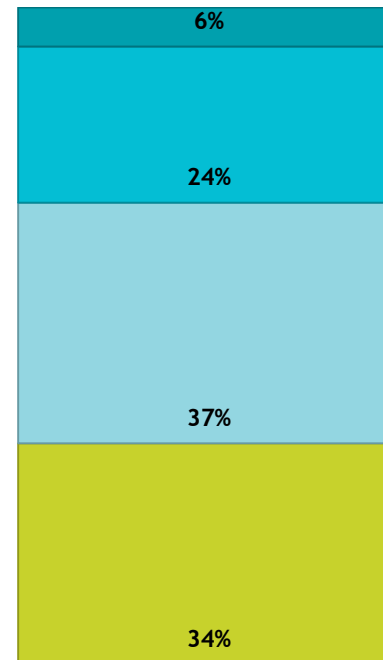
**Food contamination or
migration of harmful chemicals
from the packaging into the
food product**

66%



**Contamination of food
through intentional
tampering of the
product or food fraud**

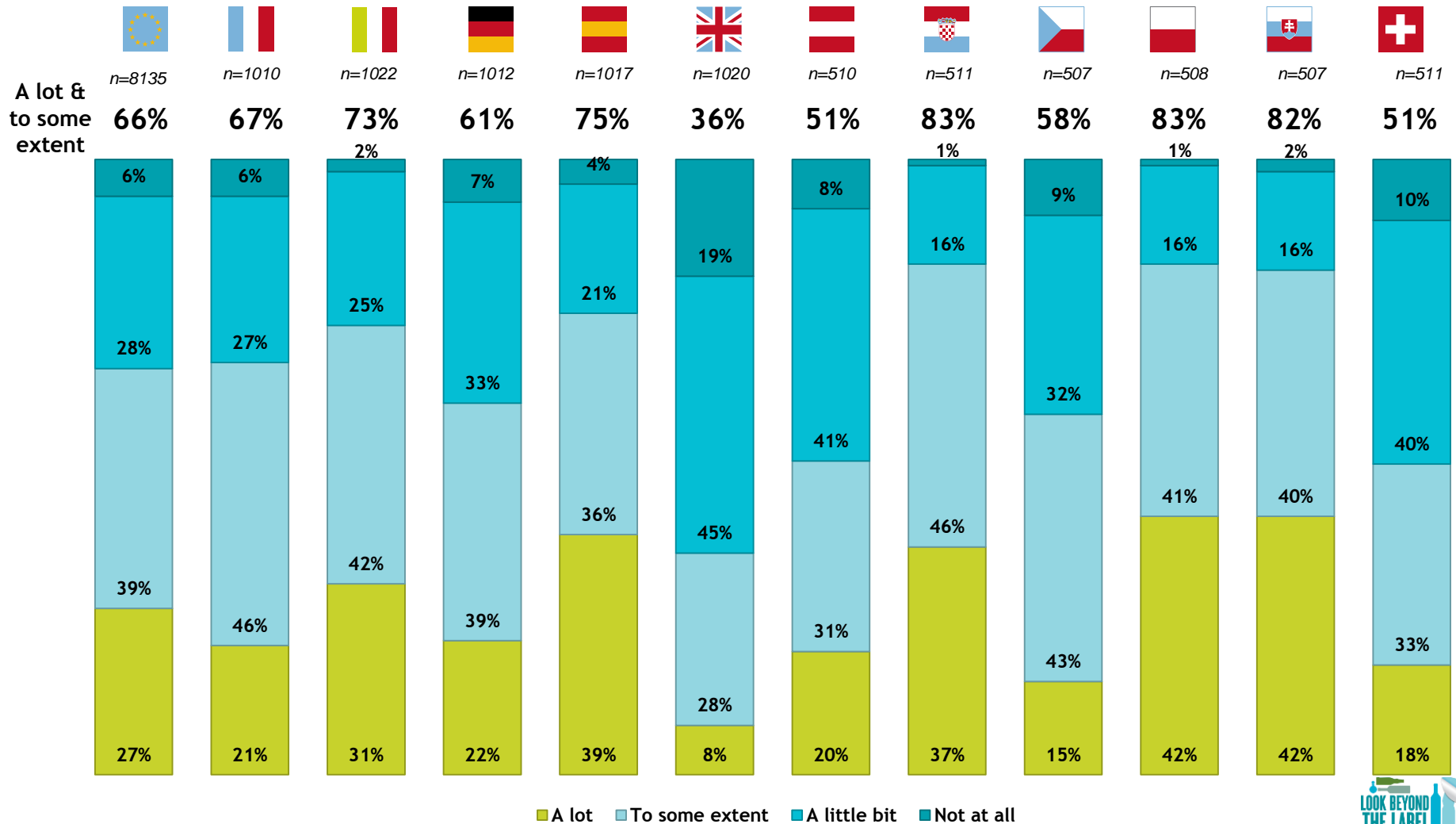
71%



■ A lot ■ To some extent ■ A little bit ■ Not at all

Southern and Eastern EU countries are most worried about contamination and chemical migration

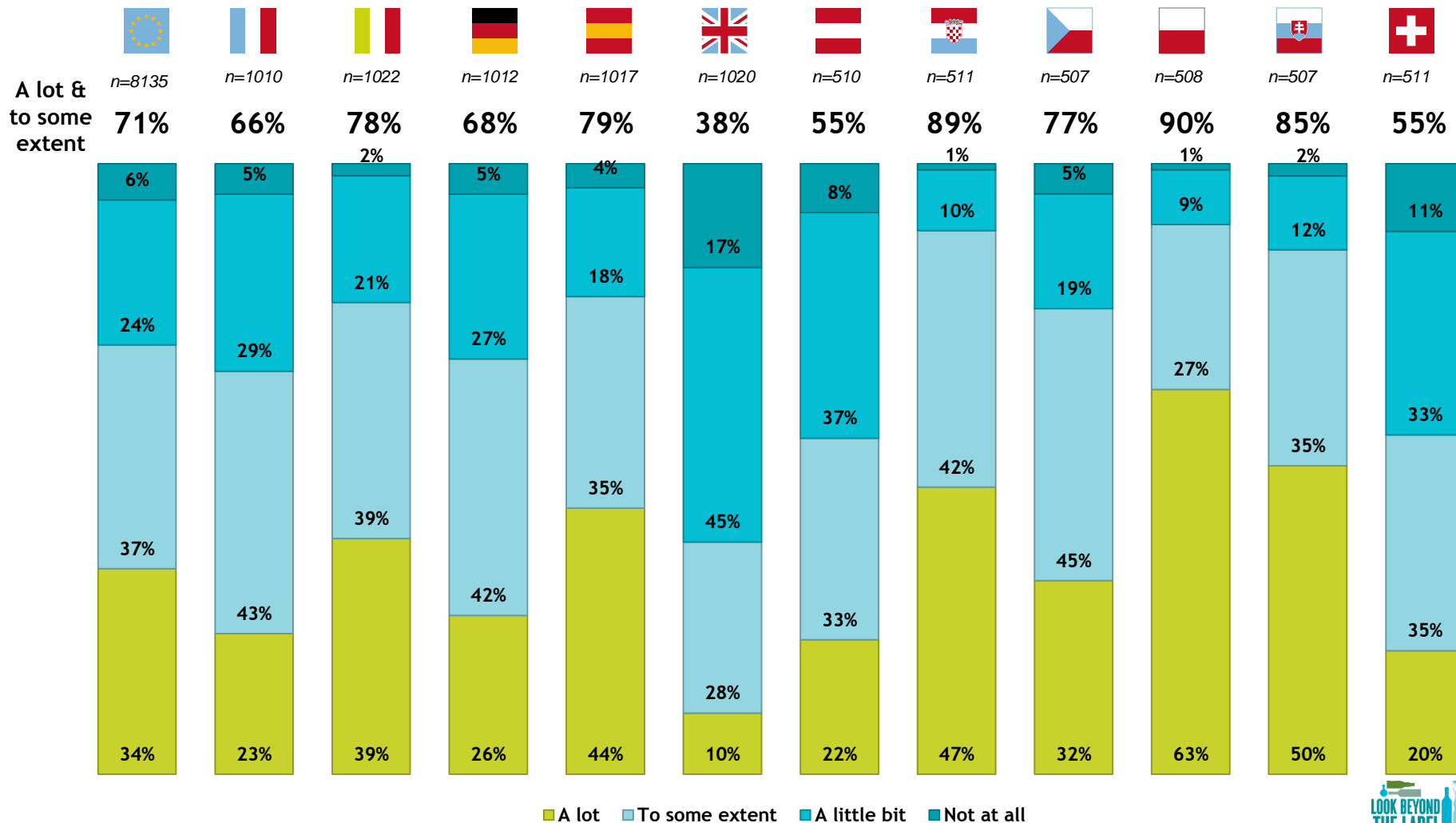
Q: To what extent do you worry about each of the following aspects of food safety? Food contamination or migration of harmful chemicals from the packaging into the food product | Filter: None



Southern and Eastern EU countries are most worried about food product tampering

Q: To what extent do you worry about each of the following aspects of food safety?

Contamination of food through intentional tampering of the product or food fraud | Filter: None

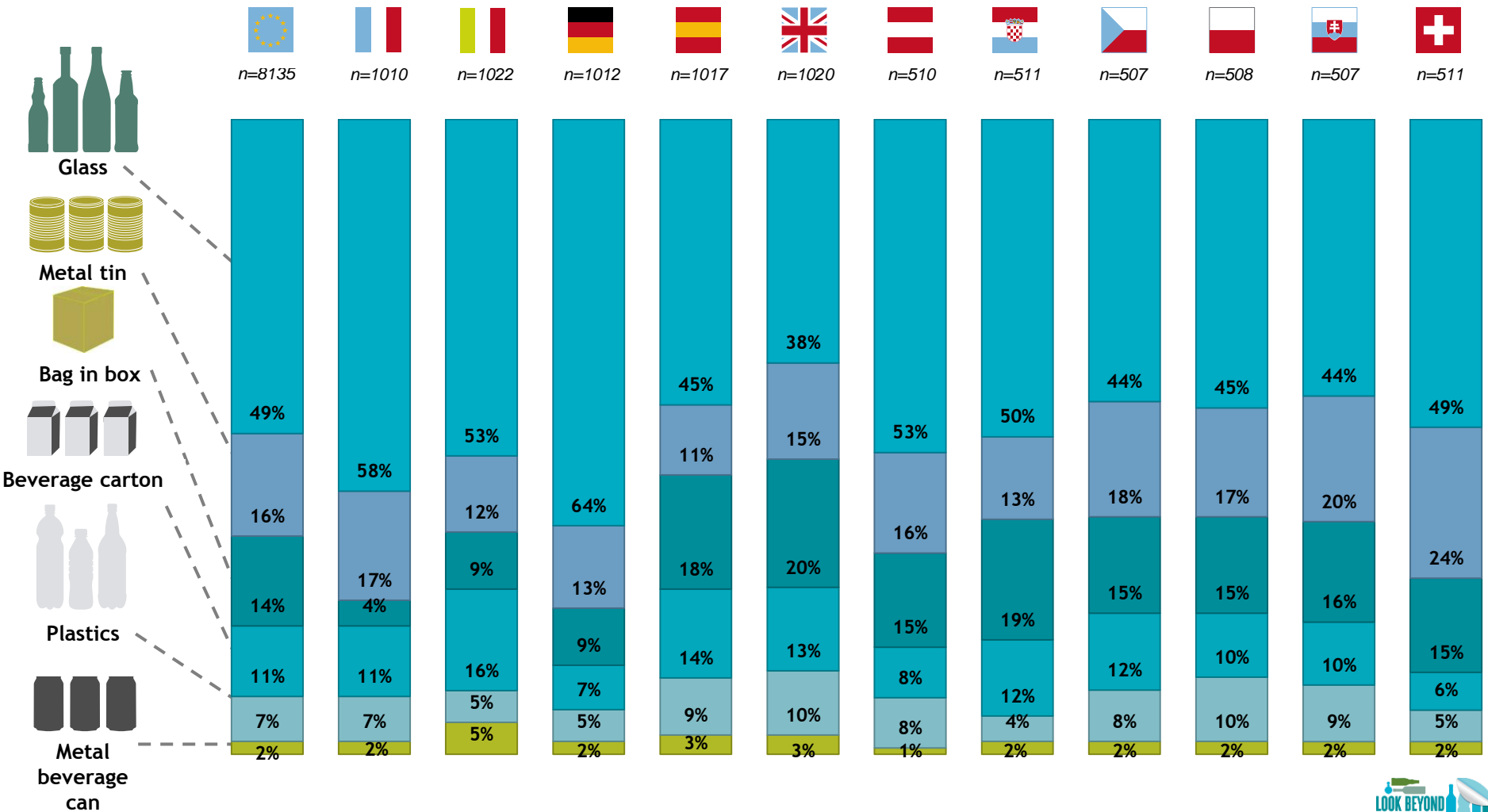


SAFEST FOOD PACKAGING

In Germany, glass has the best perception as **the** safest food packaging material

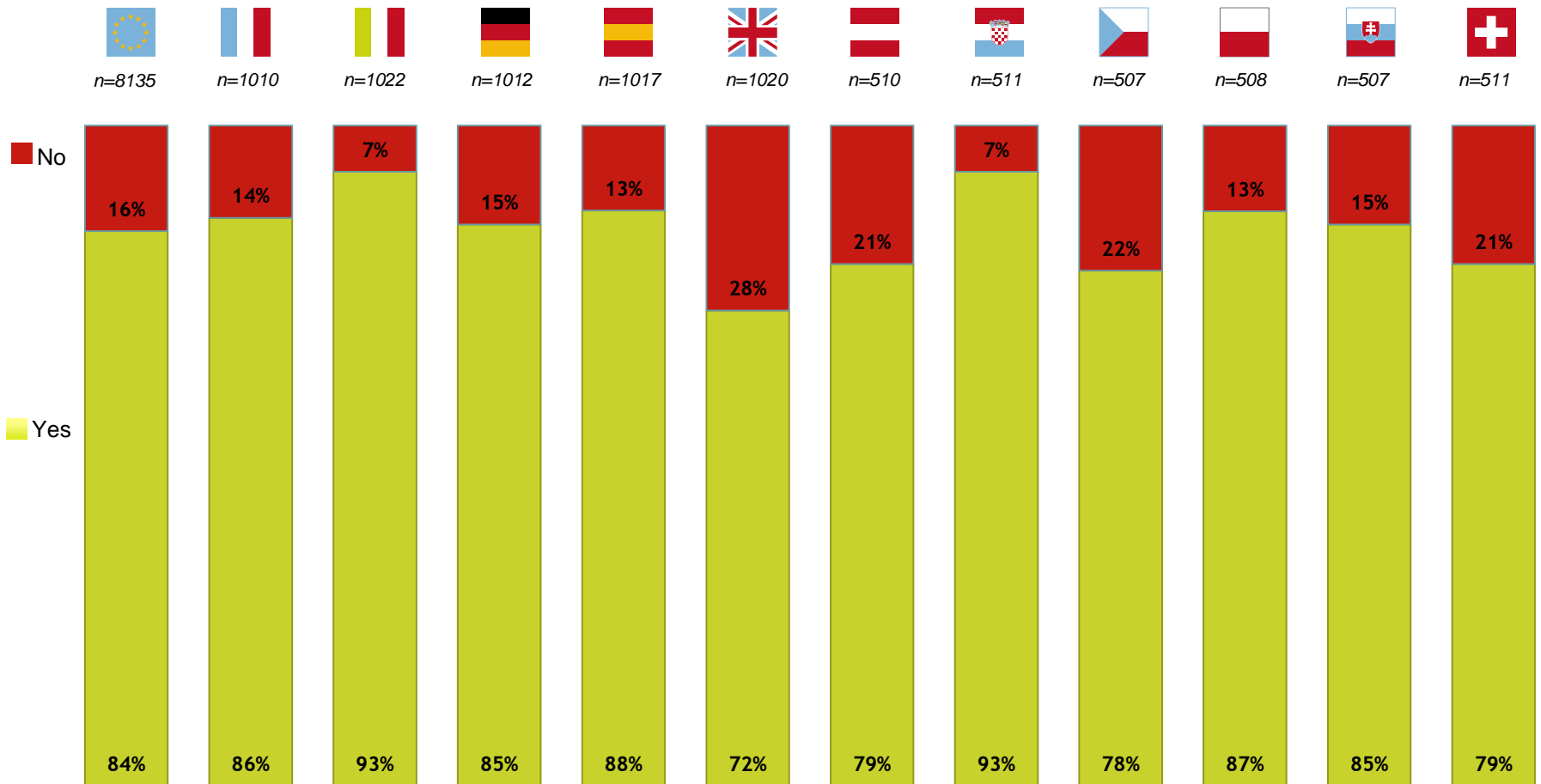
Q: What do you consider to be the safest food packaging material when it comes to food/beverage safety?

Filter: None



Over 8 out of 10 consumers believe chemical interactions from packaging create a health risk

Q: According to various scientific studies, certain materials used to package some food and drink products may cause (minor) chemical interactions with its drink and food content. This could result in a potential risk for your health. Do you personally believe this statement? Filter: None

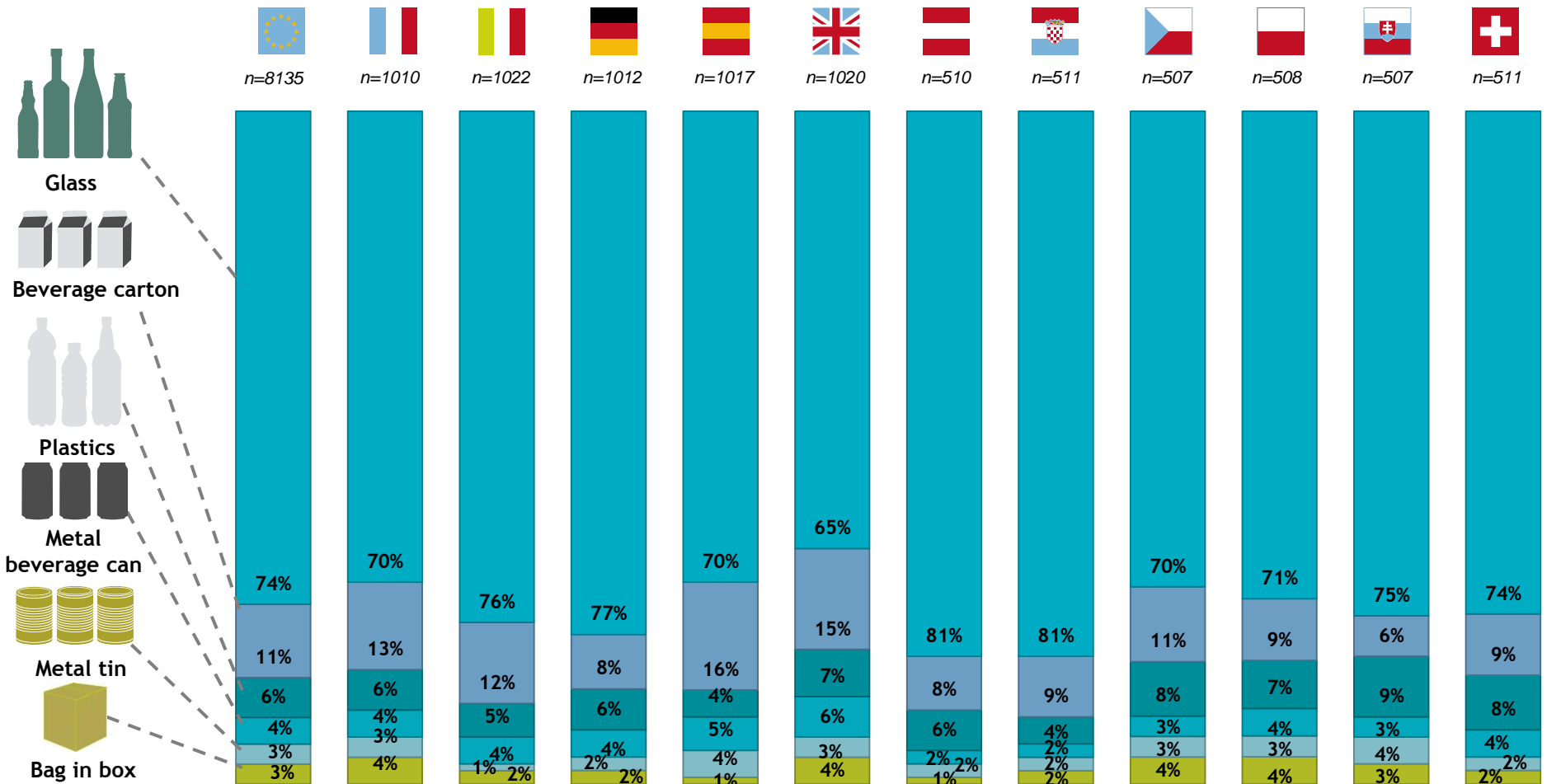


SAFEST DRINK/BEVERAGE PACKAGING

For drinks glass safety perception is highest in Austria and Croatia

Q: What do you consider to be the safest drink/beverage packaging material when it comes to food/beverage safety?

Filter: None



RISK PACKAGING INTERACTION WITH FOOD

Interaction of content with packaging is considered to be lowest for glass and highest for plastics

Q: From the packaging materials listed below, to what extent do you believe there is a risk of interaction between any food or drink products and their packaging? Filter: only if impact on health



n=6931

2010



Plastics

0%

59%

100%

57%



Metal beverage can

0%

51%

100%

49%



Metal tin

0%

50%

100%

52%



Bag in box

0%

42%

100%

41%



Beverage carton

0%

38%

100%

33%



Glass

0%

15%

100%

12%

I do not believe at all

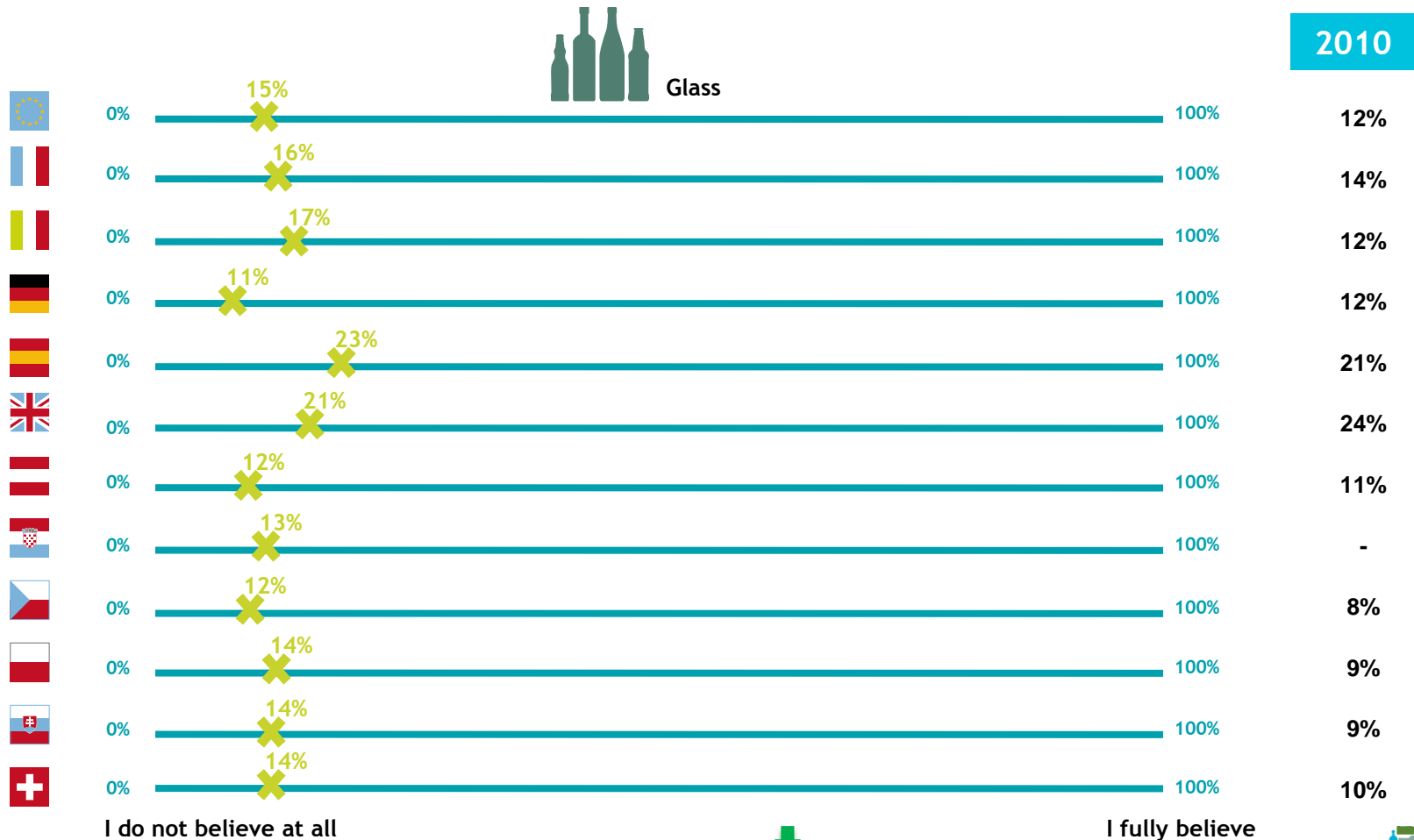
I fully believe



RISK PACKAGING INTERACTION WITH FOOD

Risk perception for glass is similar in all countries

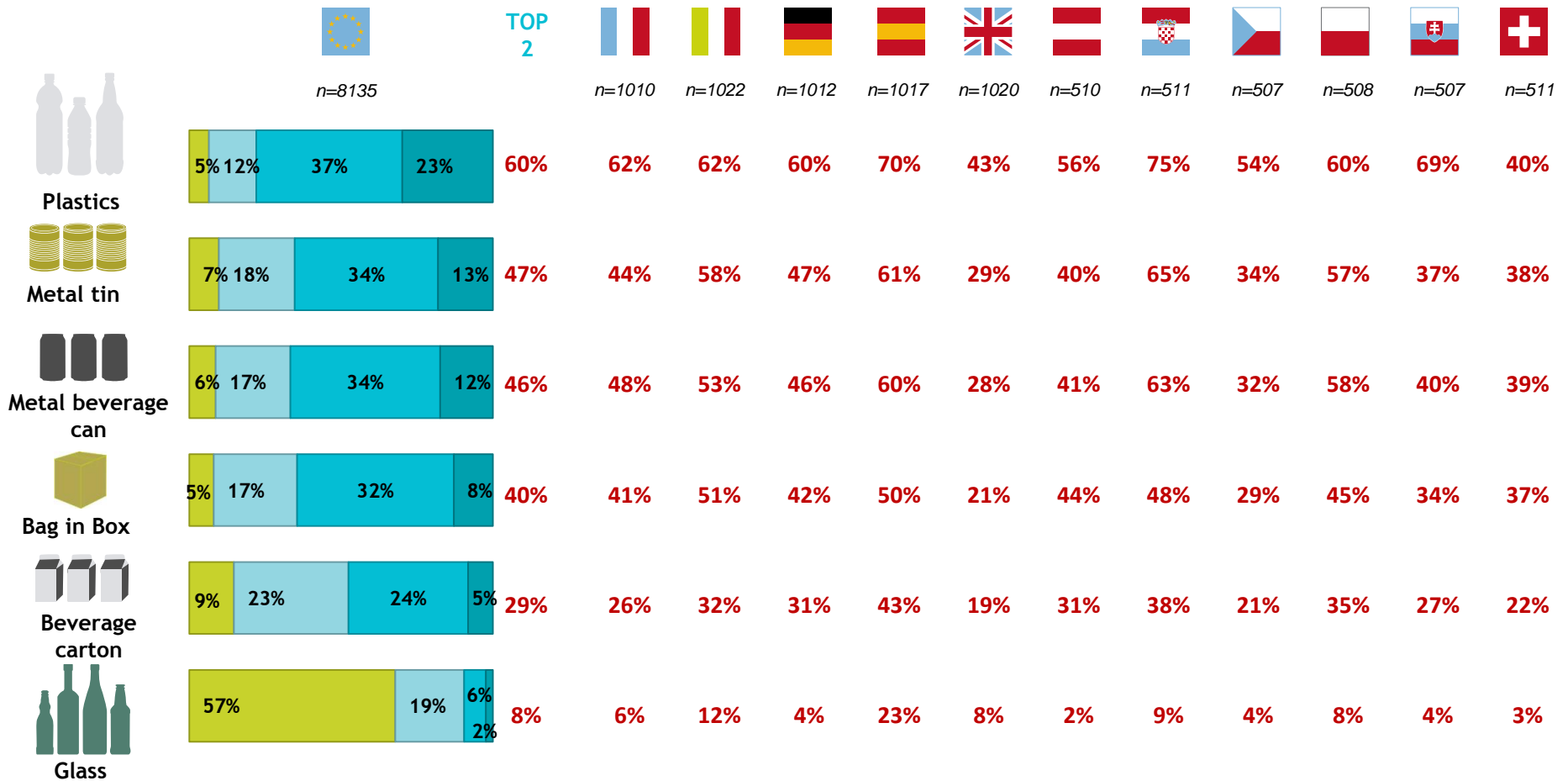
Q: From the packaging materials listed below, to what extent do you believe there is a risk of interaction between any food or drink products and their packaging? N(total)=6931 | Filter: only if impact on health



FOOD SAFETY WORRIES

Europeans worry the most about plastic and metal packages impacting the food and beverage content

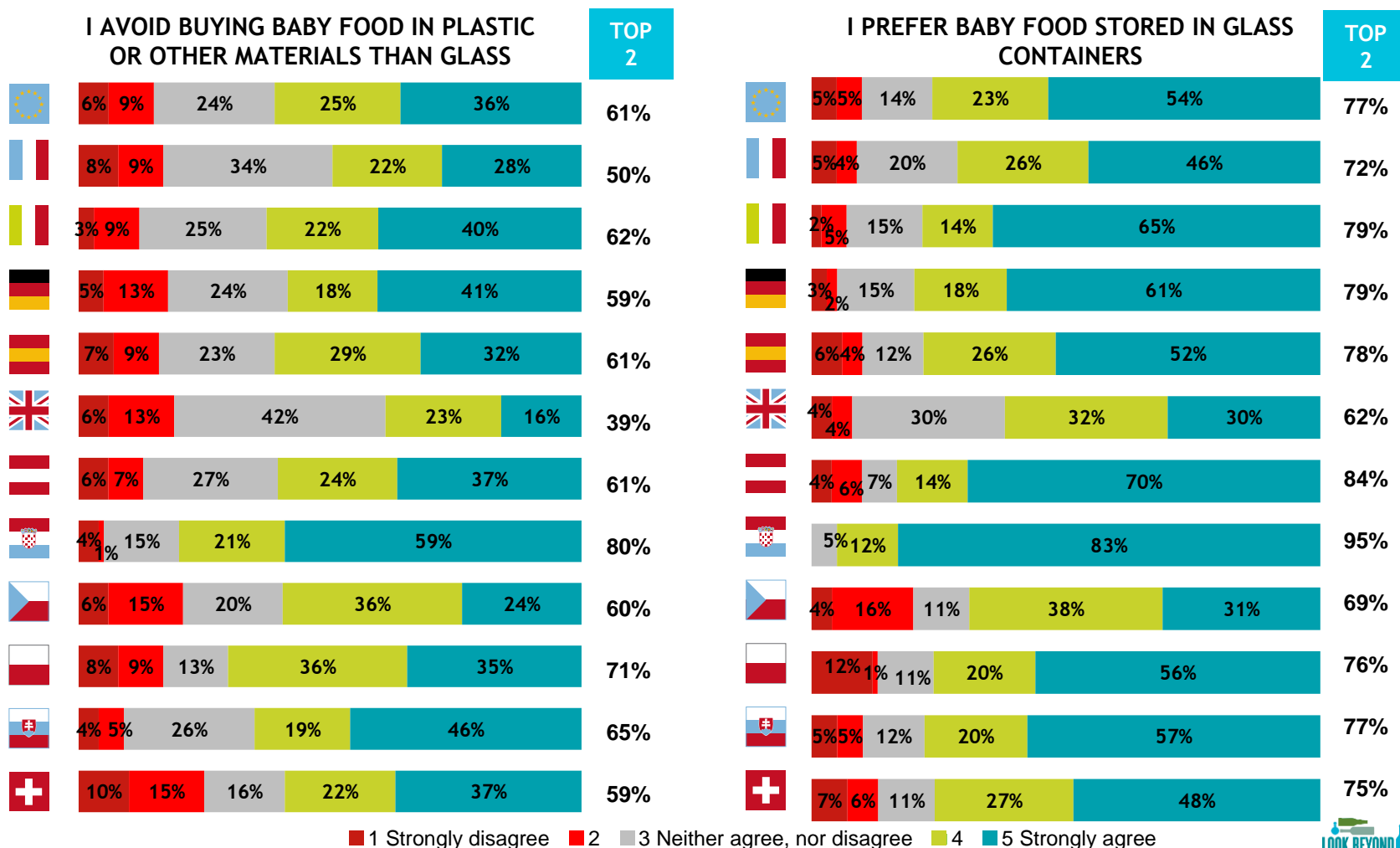
Q: To what extent are you worried about food packaging containers impacting the food/beverage content or ingredients for each of the following packaging materials? Filter: None




ATTITUDE TOWARD BABY FOOD PACKAGING

EU parents clearly prefer glass to store baby food; many avoid buying baby food in plastic

Q: Please indicate to what extent you agree with the following statements Filter: children < 6 y.o. in household





**COMPARED TO 2010, THE
HEALTH ASPECT HAS
BECOME A MORE IMPORTANT
DRIVER FOR CHOOSING
GLASS.**

For over 6 out of 10 EU consumers
health safety is an important driver
in choosing glass.

REASONS FOR GLASS USAGE

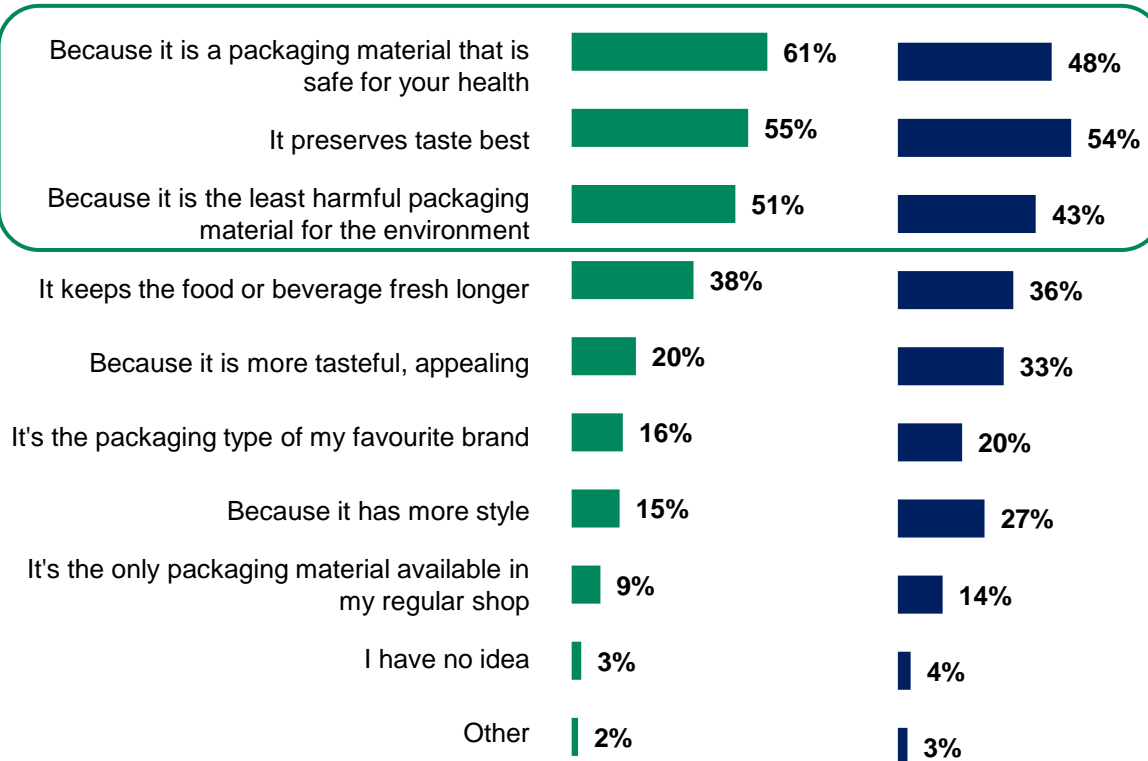
Q: If you have selected glass in any of the above categories, please select your reason below Filter: None



n=8135

2014

2010

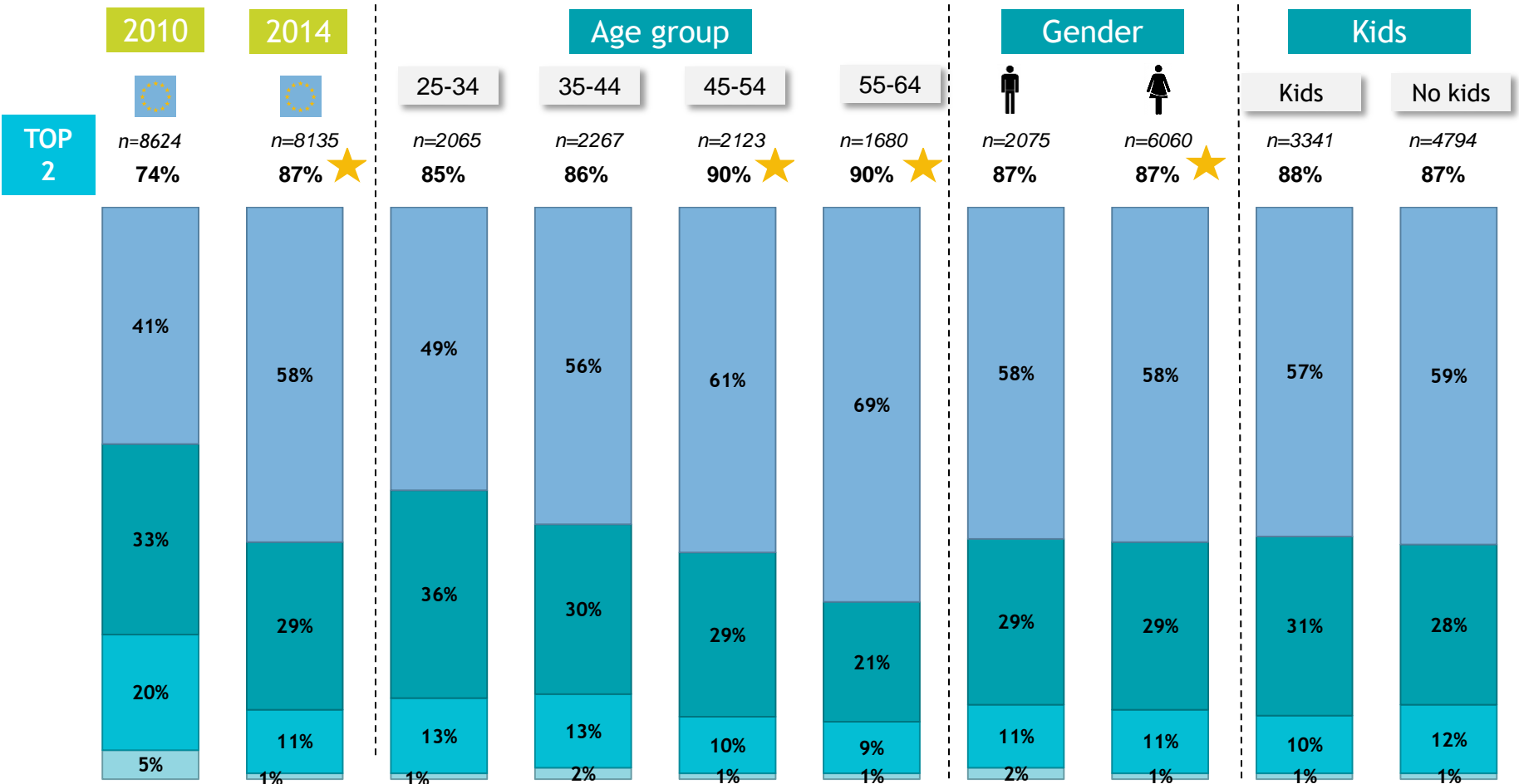


Main reasons for using glass

RECOMMENDATION GLASS

Glass is highly recommended as a better packaging material

Q: Would you recommend glass as a better packaging material to friends and family? Filter: None



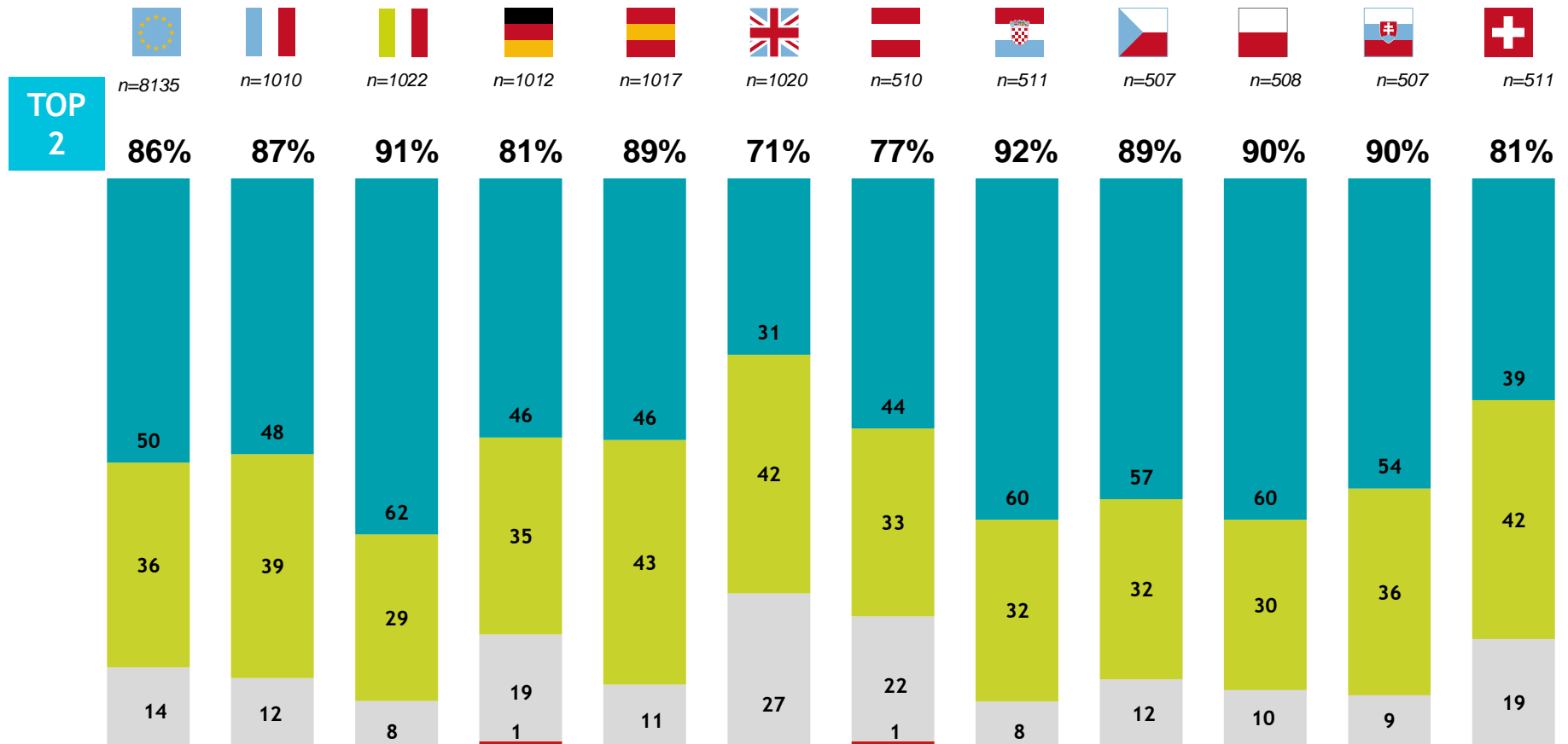
■ Definitely not ■ Probably not ■ Maybe yes, maybe no ■ Probably ■ Definitely

★ Significantly higher (95%) than other group

GLASS AS REFERENCE MATERIAL

Especially in Italy, Spain, Slovakia, Poland and Croatia, impact is important.

Q: As you may already know, glass is used as reference material, e.g. for research and laboratory, to ensure the absence of all possible chemical migration (i.e. for *in vitro* lab tests). To what extent does this influence your opinion on glass? Filter: None



■ This has a very positive impact on my perception of glass as packaging
 ■ This has a positive impact on my perception of glass as packaging
 ■ This has not really an impact on my perception of glass as packaging
 ■ This has a negative impact on my perception of glass as packaging



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www.friendsofglass.com