



**Old habits die hard:
helping consumers switch
to reuse and refill**

from **IGD**

Who am I?

Dan Gillett Shopper Insight Manager, IGD



- ▲ Macro shopper trends specialist
- ▲ Former Shopper Insight Manager at LRS
- ▲ Former Household and Impulse Insights Manager at dunnhumby
- ▲ Former Tesco Buyer
 - Central European Hardlines
- ▲ Former Tesco in-store baker, dotcom picker

Together

Commercial
Insight



Social
Impact

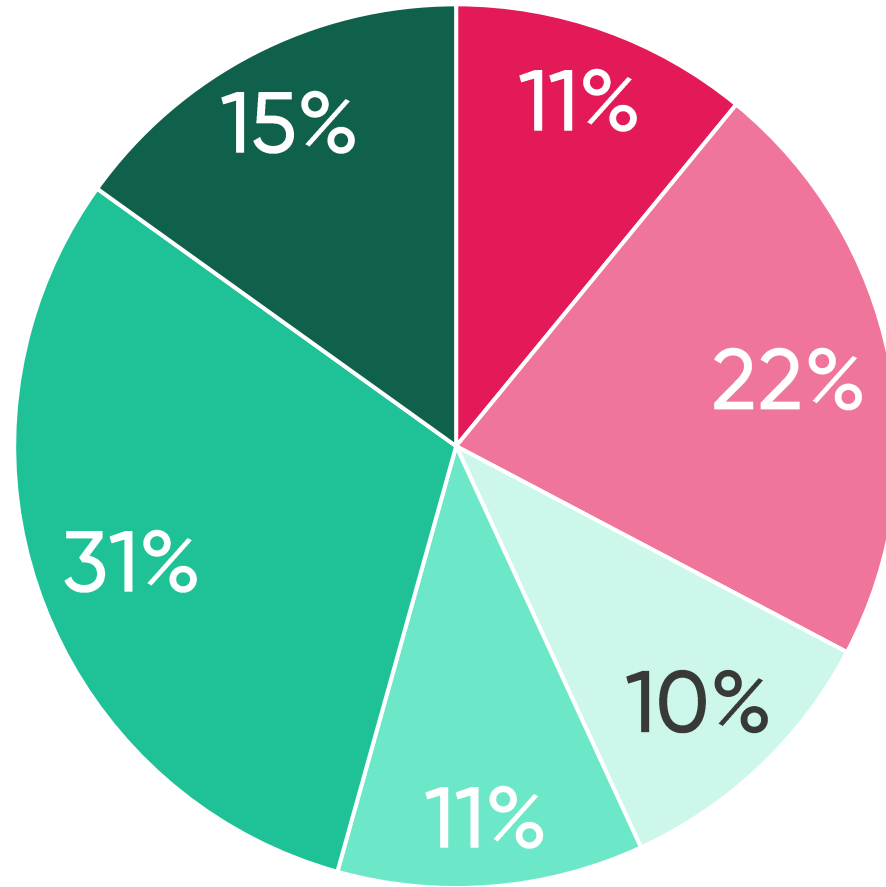
we are working to drive change
that makes a tangible difference for Society,
Business and the Individual.

Today's agenda



- 1** / Whose responsibility is it to make food and groceries sustainable?
- 2** / What do shoppers think about reuse and refill?
- 3** / How can the industry overcome barriers related to adopting reuse and refill?

Six segments of shoppers based on their climate change views



More shoppers feel that industry has a responsibility to change than themselves

64%

Agree that action needs to be taken to slow or reverse climate change

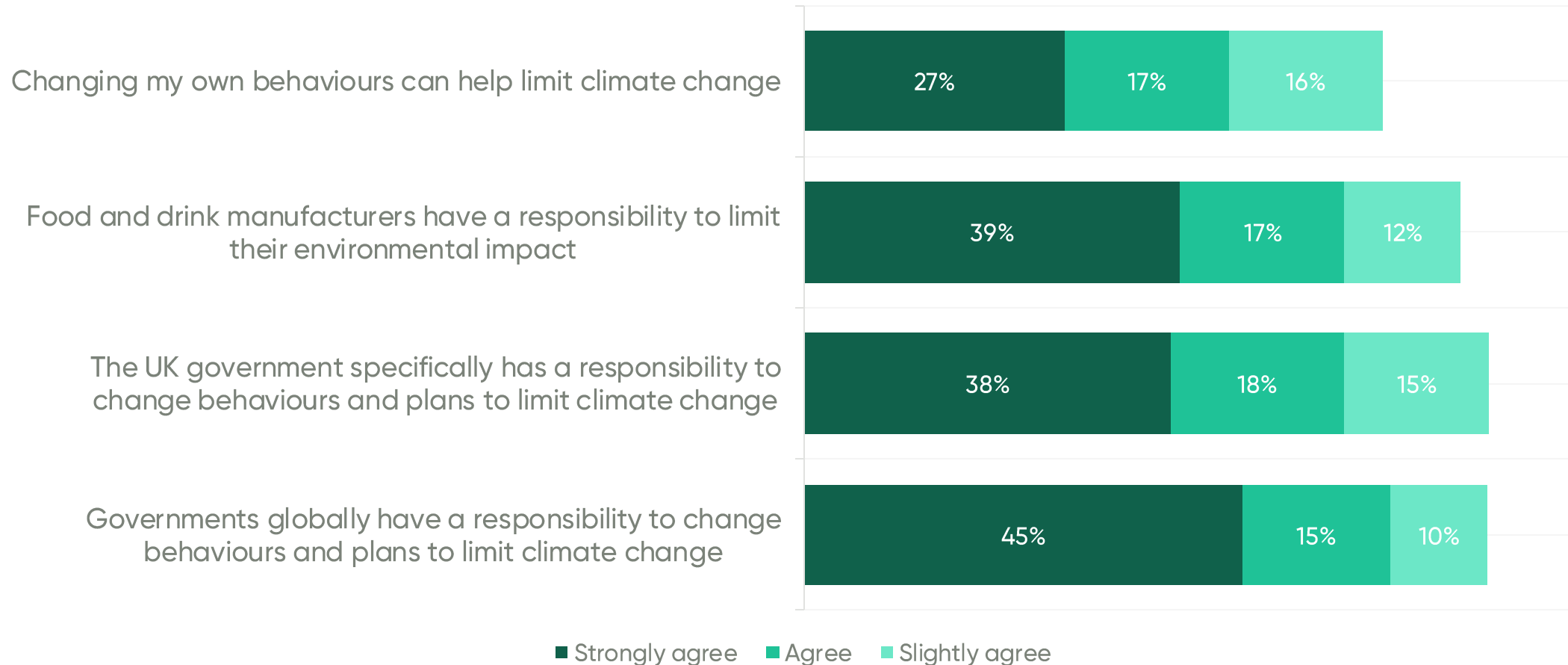
60%

Agree that changing their own behaviours can help limit climate change

68%

Agree the food and drink industry has a responsibility to limit its climate impact

Stronger agreement that industry and government need to act



Strong views on government and industry action

I think retailers should take the responsibility for this. They're the ones that **introduced plastic packaging** and they're the ones that should be working to eliminate it now...Products should be sold in recyclable packages such as cardboard or glass.

Female, 57. Post-family, London.

The Government need to make the [impact of food and grocery choices] more well known to consumers...so that people can make better choices. I know [they aren't doing this] as I was not aware of the [difference between out-of-season and in-season products].

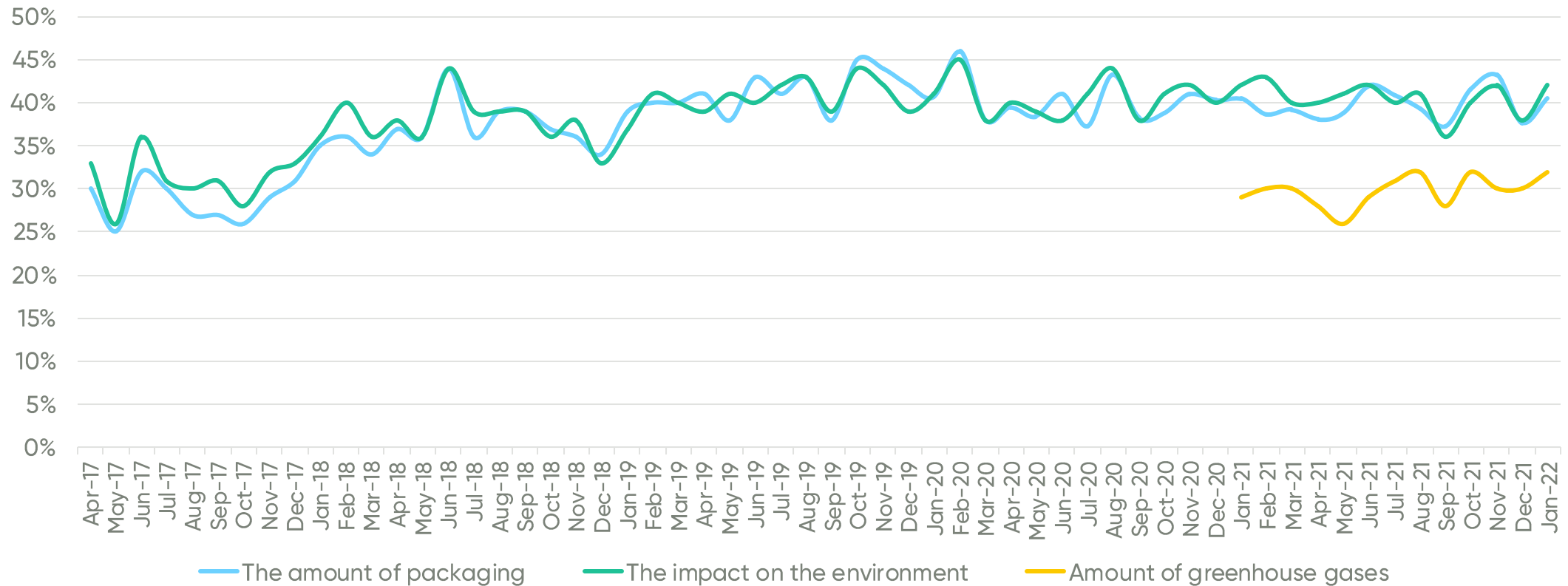
Male, 36. Flat sharer, London.

I think manufacturers use **far too much packaging** on food so feel less packaging could be used. Probably needs to be backed by the government and it is up to retailers and consumers who they buy from so guess it involves all of these.

Female, 37. Family with young children, South East.

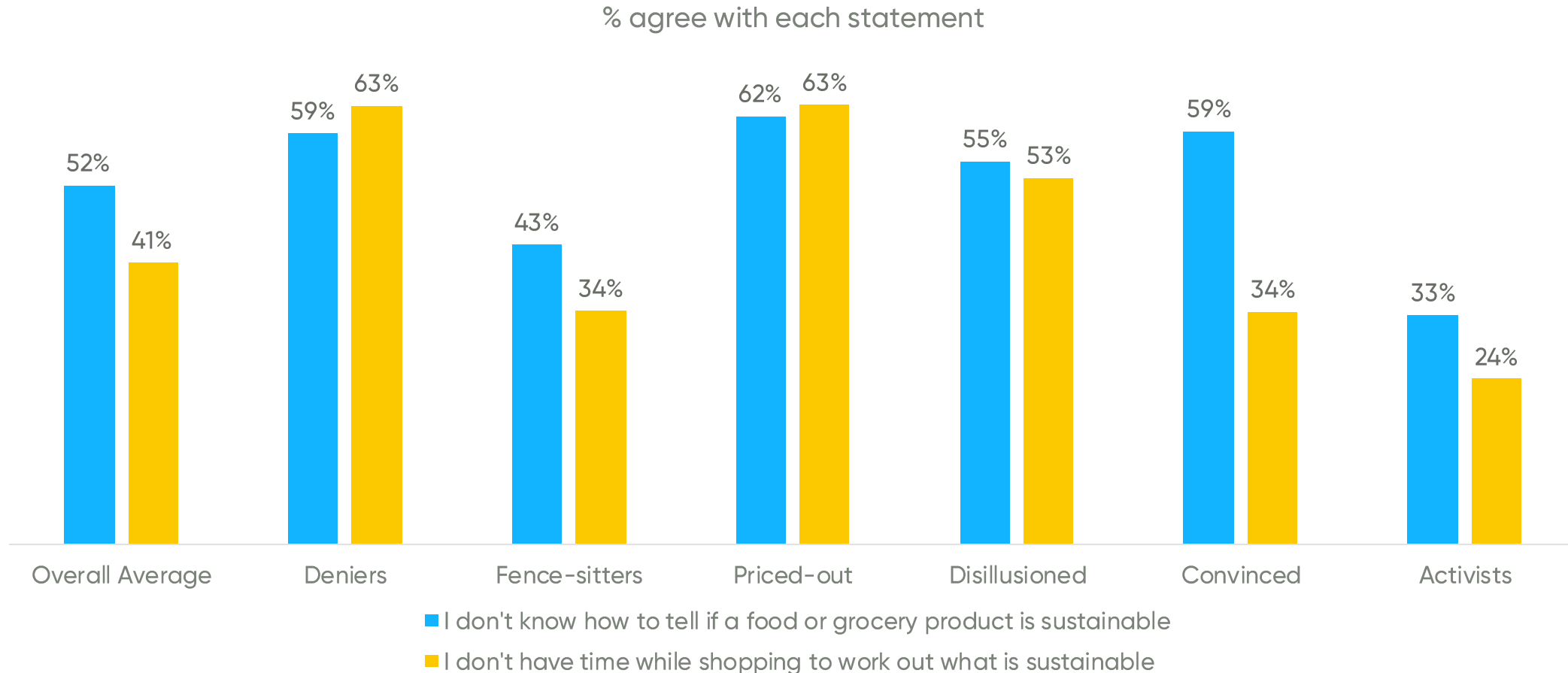
Packaging and the environment are really closely linked for shoppers

% of shoppers claiming that each factor is extremely or very important to them when choosing what food or groceries to buy





Majority don't know how to tell if a food or grocery product is sustainable



49%

18% disagree

Agreed that "It is the **retailer's responsibility** to only sell sustainable products, **not my responsibility** to only buy sustainable products."

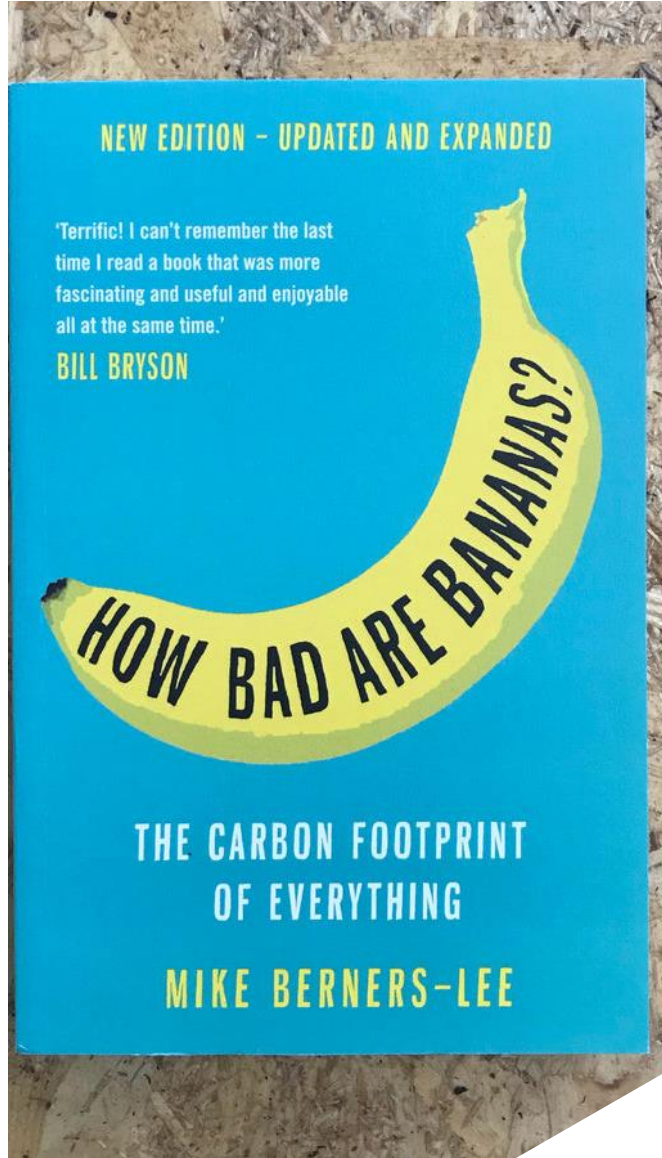
Shoppers want more information

77%

Say education is needed about the environmental impact of food and groceries

72%

Say sustainability information on-pack would help them make an informed choice



Shoppers place the blame with industry...

It annoys me that supermarkets say they are doing what they can when in reality they are doing just enough to promote themselves as green. It's the same across multiple industries.

Male, 62. Post-family, North East.

I think the supermarkets are ridiculous for engaging in this type of this. I would so love to see seasonal fruits and vegetables in the shops. It would give us a reason to get excited about food for a change. I look forward to seeing fine foods in the shops, full of flavour.

Female, 32. Single parent, South East.

It's a supply and demand issue, whilst there is a demand and it makes money, I still can't see this changing.

Male, 41. Single parent, Scotland.

Fewer say that they like the choice than want restrictions

% agree with each statement



Shoppers are used to choice, but say they would accept change

I guess I haven't really thought about it. I do tend to always buy British meat though but a lot of the fruit I buy especially off season is from overseas. I think they should limit the products they sell when out of season and I think it is something we would just get used to.

Female, 56. Boomeranger, Scotland.

I think...they should make some stuff only during seasons but I'm sure a lot of people would disagree as they like to get what they want.

I think the impact I do is very small and doesn't make a big difference.

Male, 34. Single parent, South East.

It's a tricky one. I would like to say that it would be good if supermarkets limited such goods, but I and others want the choice we are used to, and the supermarket is simply meeting demand. It takes individuals to take action to make a difference...

Male, 41. Co-habiting couple, London.

Whose responsibility is it to make food and groceries sustainable?

- ▲ Yours – Industry and Government.
- ▲ More than just cutting direct damage
- ▲ Information is key
- ▲ Choice is key
- ▲ Share that responsibility

Three key takeaways

- ▲ Packaging = environment for many shoppers
- ▲ Shoppers want your help to live more sustainably
- ▲ Shoppers claim to be willing to change

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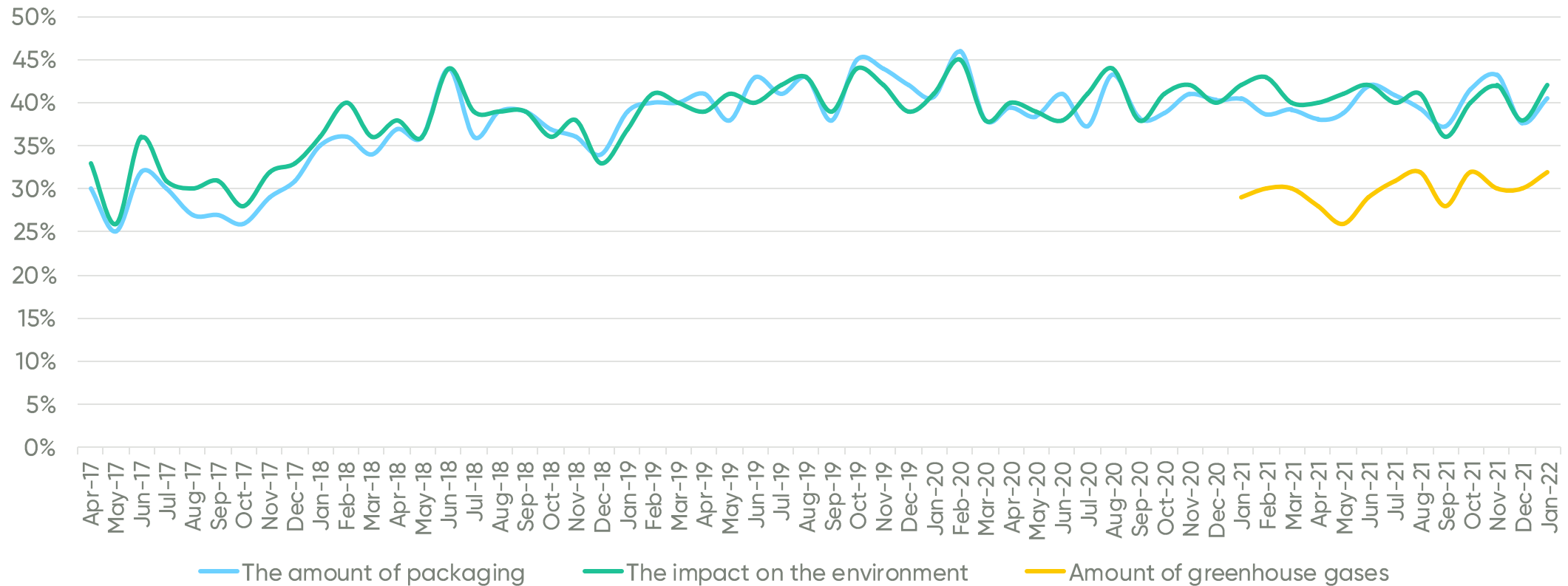
78%

6% disagree

Agreed that "More **big brands should offer the ability to refill their packaging, rather than buy an entirely new one**"

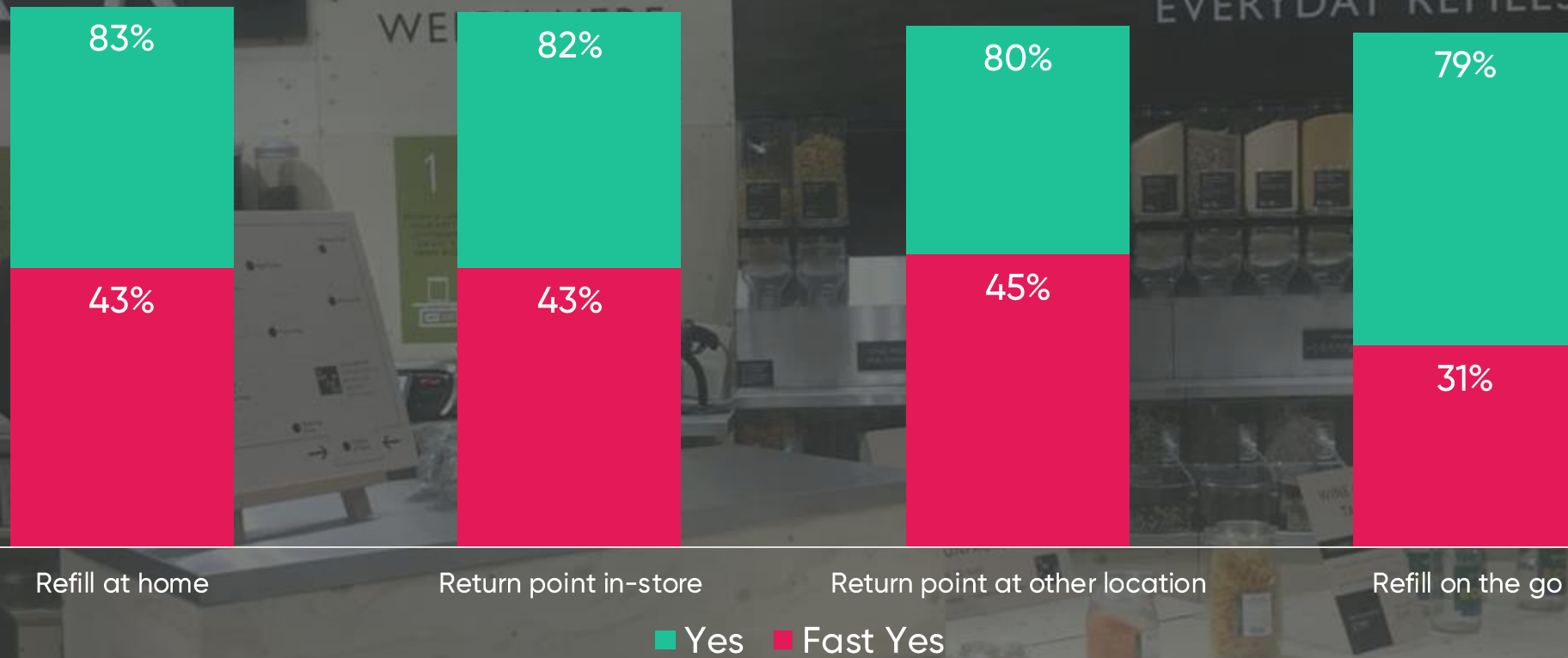
Which should not be a surprise...

% of shoppers claiming that each factor is extremely or very important to them when choosing what food or groceries to buy



Strong support for all the options presented to shoppers

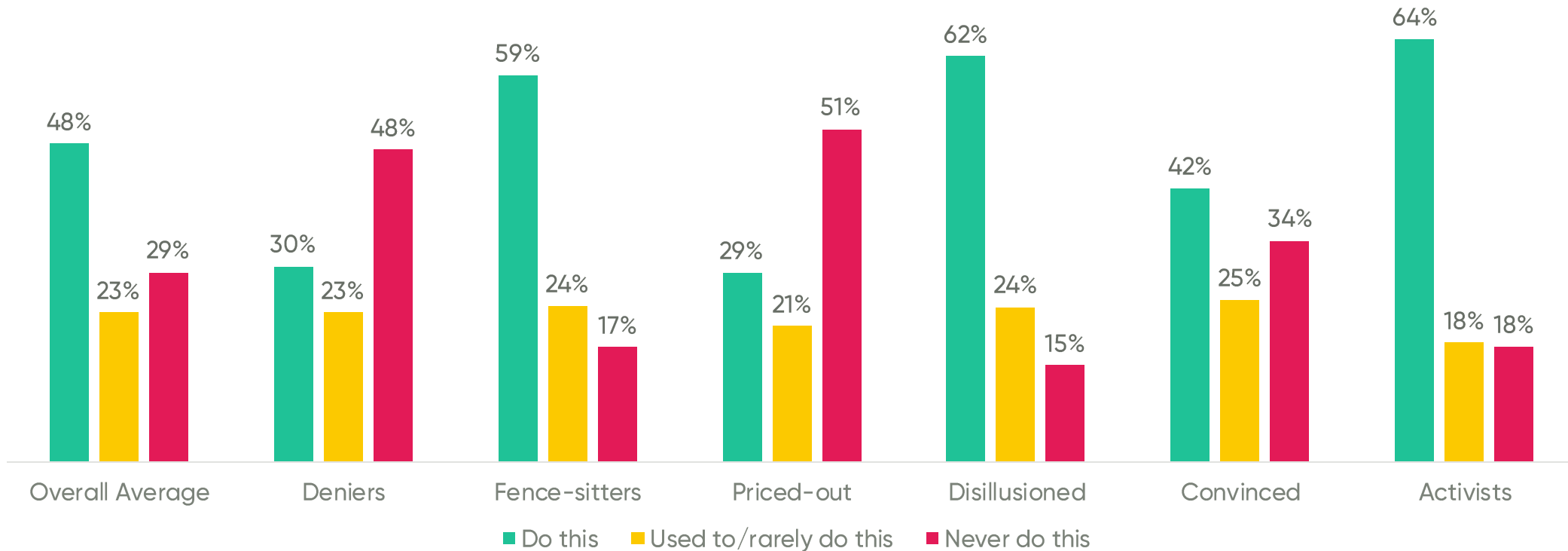
% shoppers open to each option





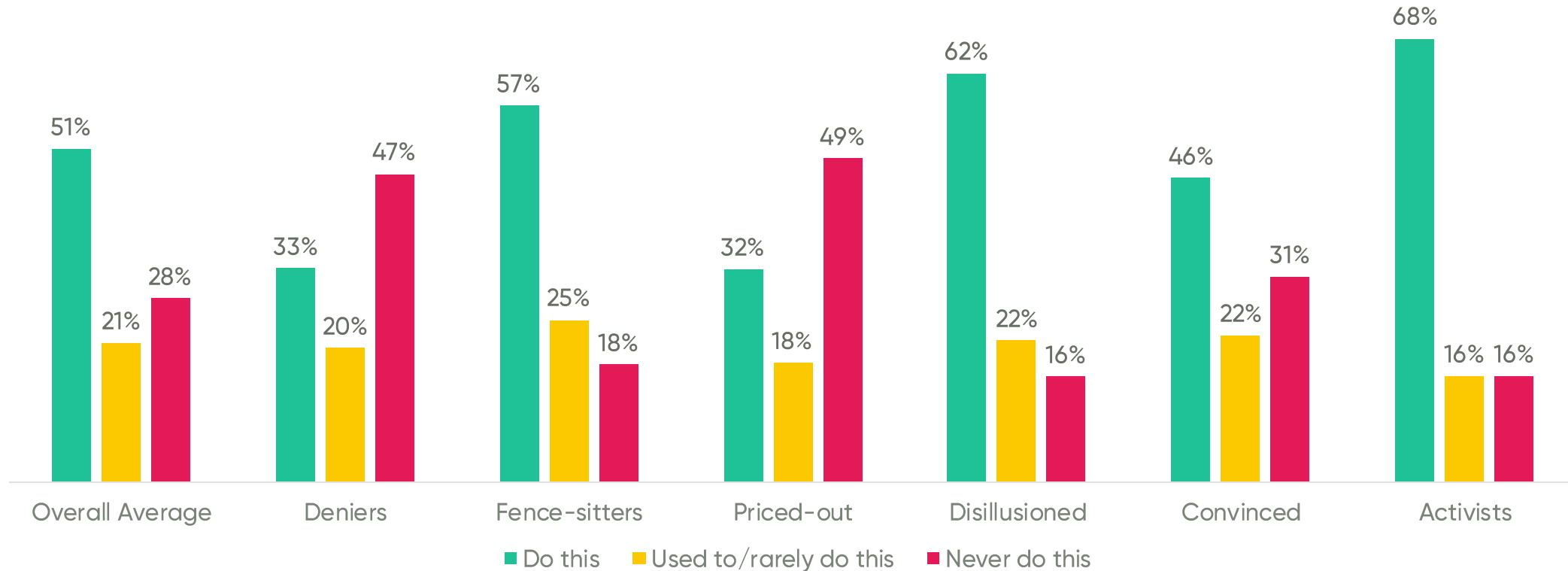
Good usage of at-home cleaning refills, but with more room to grow

Claimed usage of refillable bottles of cleaning fluid



Slightly higher usage of toiletries refills

Claimed usage of refillable bottles of toiletries e.g. hand wash



76%

5% disagree

Agreed that "More cleaning/toiletries products should **sell refills for their bottles** to reduce single use plastic"



£10

£1.65

£3

£2

£3

£3

90p

70p

£2

£1.50

£1.50

£2

£2

70p

90p

£2

£3.35

£2

£2

£2

£1.50

£1.50

£1.50

£1.50

£1.50

70p

90p

£1.50

£2

£2

£2

No Harsh Chemical Residue

No Harsh Chemical Residue

£4.50

£2.75

£3

£1.50

£2

£2

TESCO Refill

TESCO Refill

90p

TESCO

100% GRIME REMOVAL

70p

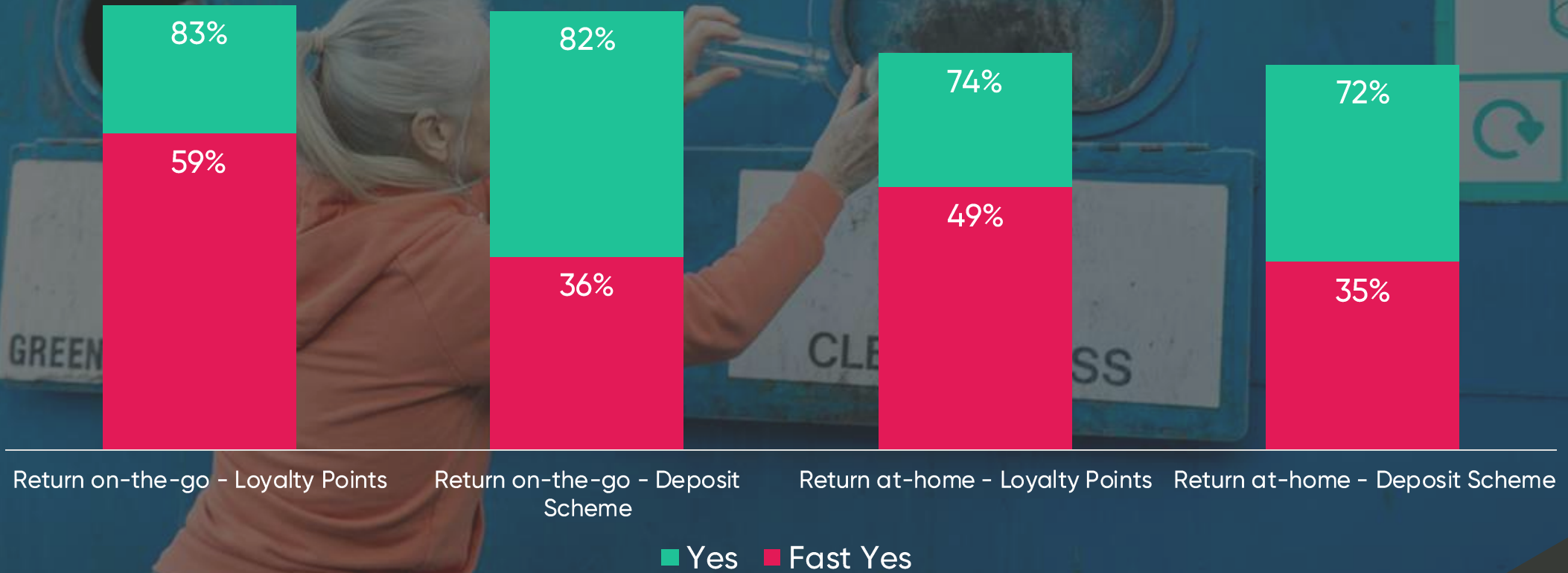
90p

£1

£1.50

Loyalty points a bigger incentive than deposits for return schemes

% shoppers open to each option

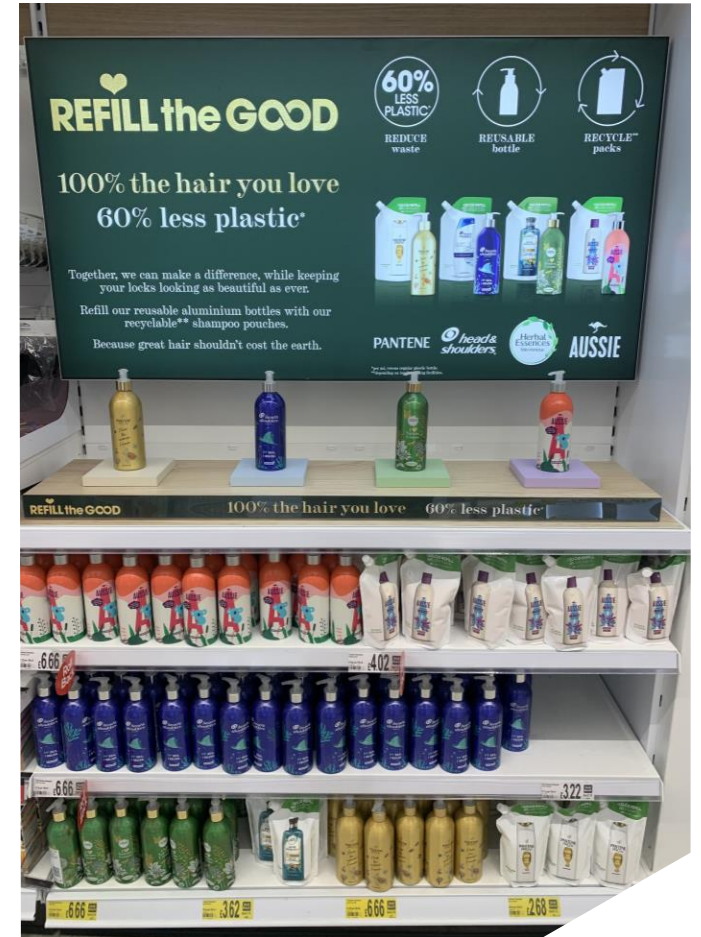


Waitrose Unpacked



Asda Sustainability Trials







Shoppers claim to be very interested in refill stations, and want to see more

74%

Would use a refill station like this if their local store had one

74%

Want to see more types of products available at refill stations

There are barriers to shopper uptake which need to be overcome

60%

Say they would be concerned about hygiene

77%

Need to be convinced about the freshness of the products available

52%

Concerned about the cost of reusable containers if they forget to bring them

“

If you're going with a plan then the refill will work, but it does look a lot more hassle, and I struggle to see what's in it for me. Maybe if I had all the time in the world, but mostly I'm rushing around.

”

Consumer (Family, ABC1)

Three key takeaways

- ▲ Strong desire for more help reducing and reusing
- ▲ Strong usage of at-home refills, more room to grow
- ▲ Convincing required on in-store refills

Four big barriers to refill in-store

- ▲ Hygiene
- ▲ Freshness
- ▲ Price
- ▲ Time

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How to convince shoppers to use in-store refills?

Make it
pay for
them

Make it
quick &
easy

Reassure
them on
freshness,
hygiene

Tell them
why they
should

Vimto squash refill station, Asda Middleton



- Single use cost: £1.50 per litre
- Refill cost: £0.75 per litre
- Refillable bottle cost: £2
- Repay time: 3x litres

44%

27% disagree

Agreed that "It's **too expensive** to support an environmentally friendly lifestyle"

How to convince shoppers to use in-store refills?

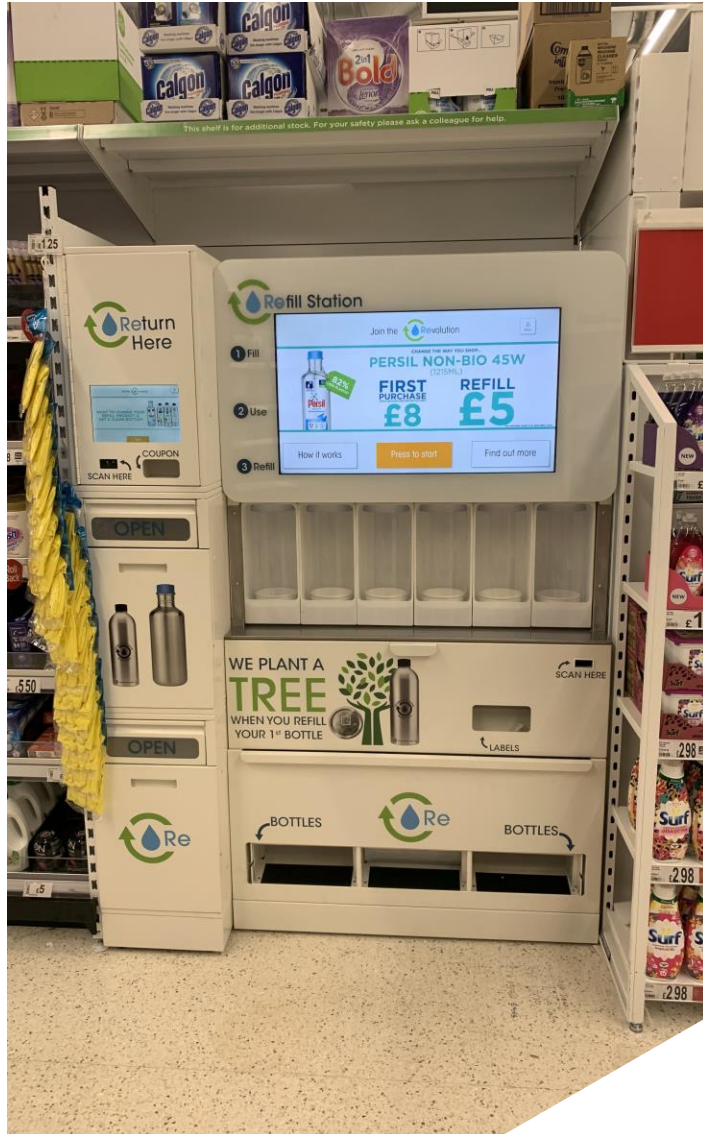
Make it
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shoppers

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Reassure
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Tell them
why they
should

Unilever refill station, Asda Milton Keynes



- ▲ Offers Radox shower gel, Simple handwash and Persil non-bio
- ▲ Dispenses bottles and liquids
- ▲ Clear instructions, minimal input

How to convince shoppers to use in-store refills?

Make it
pay for
shoppers

Make it
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Reassure
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Tell them
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Dry goods refill station, Asda Milton Keynes



- ▲ Dry goods areas have a spillage tray
- ▲ Catches any overspill and conceals it
- ▲ Cleaned regularly throughout the day

How to convince shoppers to use in-store refills?

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77%

5% disagree

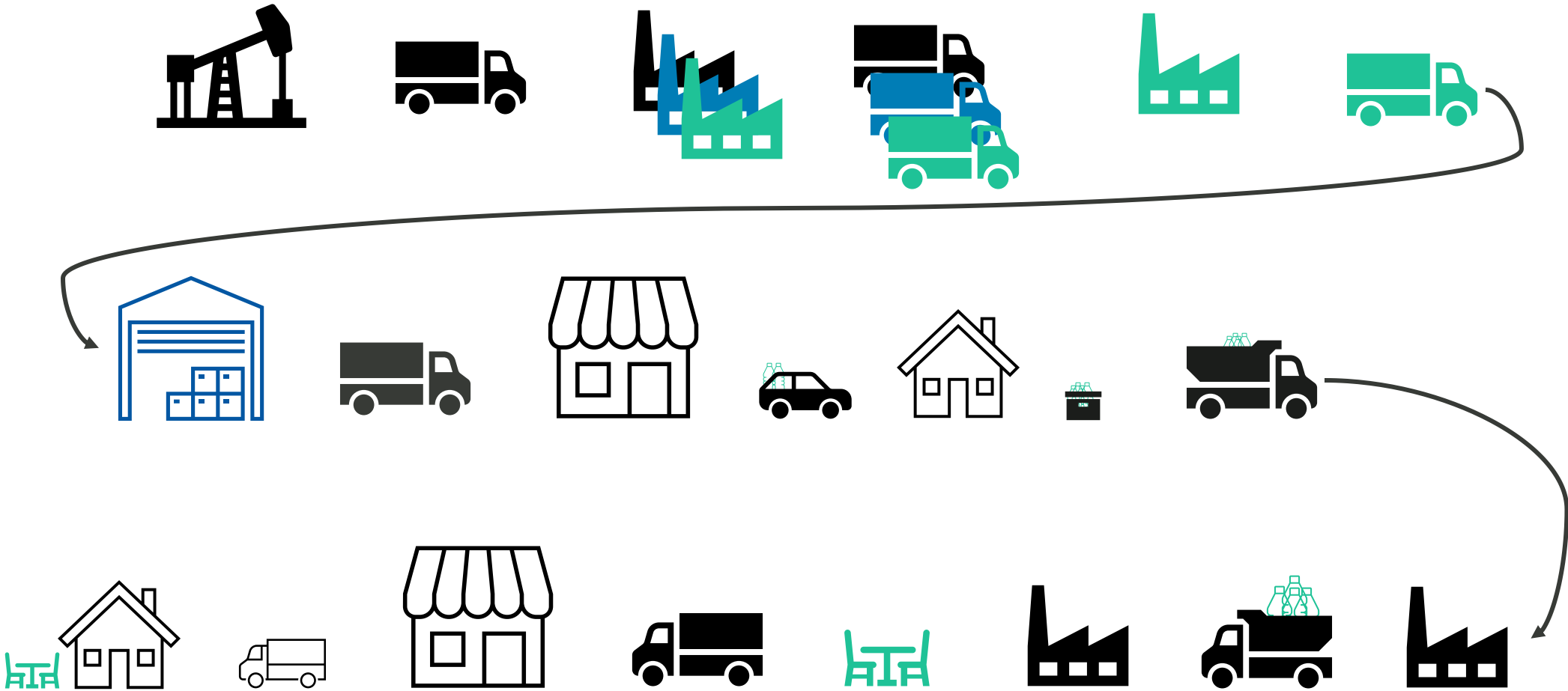
Agreed that "More education is needed about the environmental impact of the food and grocery products we buy."

**Is a conversation about packaging
the right one to be having?**

from **IGD**

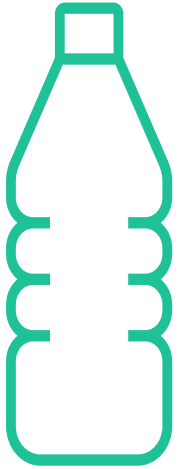
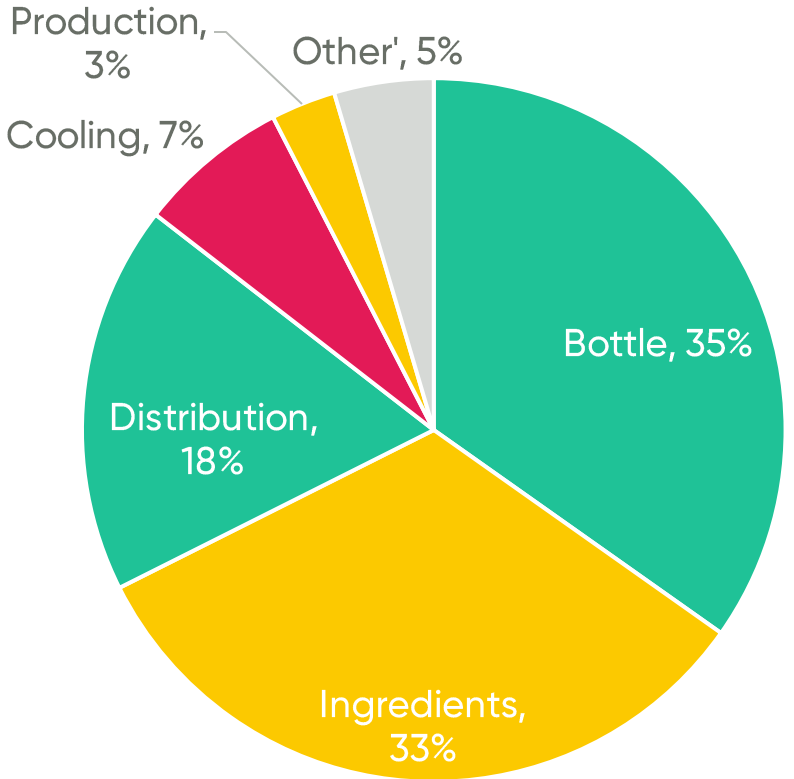


The life of a bottle..



There's more to it than just the bottle

Greenhouse gases split for a bottle of carbonated soft drink, factory to home



£



££

The life of an in-store refill?



LET'S REDUCE

REFILL ZONE

LET'S REUSE

WEIGH HERE

soda stream SOFT DRINKS Vimto

ASDA

ASDA P&G

WEIGH HERE

LET'S REUSE

Vimto

Squash Refill



HOW TO REFILL



REFILL & REUSE

Working together, we can cut packaging waste!



Environmentally and financially, the benefits are significant

- ▲ Lower raw materials costs
- ▲ Lower bottling plant costs
- ▲ Lower distribution costs
- ▲ Lower marketing costs
- ▲ Lower disposal costs



You can deliver on all of the key needs

Make it
pay for
shoppers

Make it
quick &
easy

Reassure
them on
freshness,
hygiene

Tell them
why they
should

How can the industry overcome barriers related to reuse and refill?

- ▲ If you're going to do it, do it right
- ▲ Reach critical mass with your solutions
- ▲ Tell shoppers why you're doing it, how they're helping
- ▲ Live and breathe sustainability



Thank you

Dan Gillett, IGD

Dan.Gillett@IGD.com

from **IGD**