

PACKAGING

and the **DIGITAL**
shopper



Meeting Expectations in
Food & Beverage

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Foreword

When I first spoke to Danielle Sauv  about *Packaging and the Digital Shopper: Meeting Expectations in Food & Beverage*, I was really intrigued. In fact, I’ve never seen a study quite like it – from my point of view, it was truly unique. Marketing, design and packaging professionals are consistently looking for ways to improve their processes, produce unique packaging and create brand loyalty, but often times forget to look to their audience to provide them with the best insights.

This survey and its takeaways validate what some in the industry may already know, but really hammered home a consistent consumer experience. I’ve heard from some brand leaders that they believed there was an opportunity to change packaging based on channel – for example, product packaging on the shelf may not be the same as the product packaging image they see on an ecommerce site. But is that truly what the consumer prefers?

Beyond channel, brand integrity is further established through consistency across regions. Campbell Soup in the far east needs to look like Campbell Soup in North America. Consistent colors, packaging type and marketing images matter. Validating authenticity of products by utilizing QR codes and intelligent packaging will not only take packaging to the next level, but help a shopper determine whether or not a product is fraudulent. Brand owners need to differentiate, communicate and create consistency. Consistent experiences make your product and brand look good and make consumers feel secure.

This study really reminded me why I love packaging: our industry matters. We need to continue to evolve with the ever-changing consumer demands; there are plenty of opportunities for brand leaders to elevate the packaging experience. Hopefully, readers will find gold nuggets of wisdom in this study that help them determine next steps for their marketing, design and packaging strategies. Furthermore, I hope that Danaher’s Product Identification Platform of companies continue to dive deeper into gathering customer feedback to better assist us in producing quality packaging that drives consumer loyalty.



JAMES D DOWNHAM

President & CEO, PAC, The Packaging Consortium

Introduction

Empathy helps brand leaders understand what shoppers want in food and beverage packaging. This knowledge on what shoppers like helps fuel innovative product designs with strong value propositions, but knowing how shoppers want to receive products is also a critical piece of the full story.

Without knowing the means by which shoppers want to receive products, marketers and brand leaders risk losing out on revenue opportunities.

In order to understand what shoppers want from food and beverage packaging, we asked the following questions in our research:

- What is most important to them, both emotionally and functionally?
- How do they feel about the packaging of products that they are going to put inside their bodies?
- What makes them return products?
- How does the physical package relate to their online purchase experience?
- What types of food and beverages do they buy online?
- What can consumer packaged goods (CPG) professionals learn from the findings of this study?

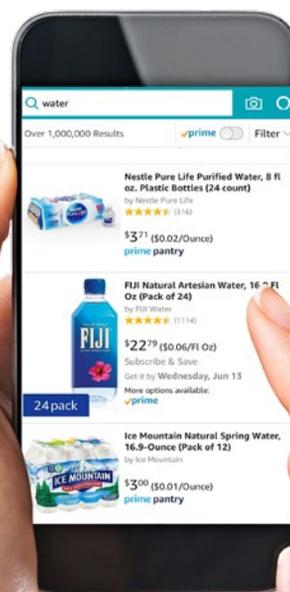
For **brand managers**, the learnings offer opportunities to increase sales and reduce costly return rates.

For **design leaders**, the results reveal specifics about shopper expectations of information and aesthetics of packaging, about the importance of recyclable packaging and the co-existing preferences for exciting colors.

For **packaging professionals**, these learnings validate the important role that packaging plays in the shopper experience of a brand; a product is only as good as the packaging that presents its first impression.

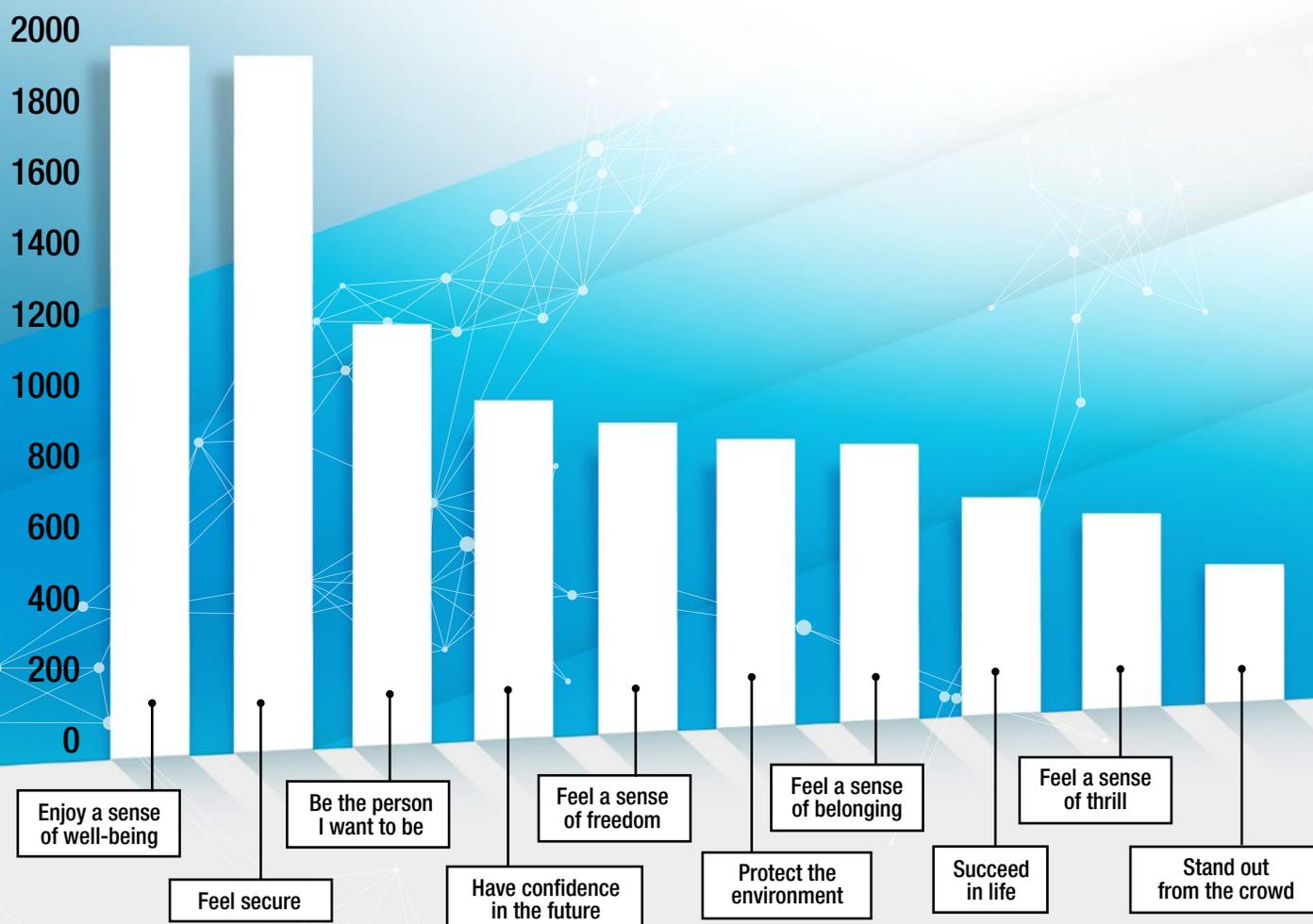
For **tech leaders supporting brands**, these learnings demonstrate the importance of the integration of the packaging data ecosystem with marketing efforts like search engine optimization (SEO) and e-commerce.

It is our hope that these insights into shopper expectations will awaken the curiosity of food and beverage leaders to the many opportunities that exist to optimize, evolve, and connect packaging, all toward the outcomes of increased sales, increased relevance and transformation of the technology platforms that support the entire packaging value chain.



Consumers crave security and truth

When I use a product from my favorite brand I...



In the current global arena, where consumers are continuously fed information about shocking and tragic, confusing and confounding happenings from around the world, it's no wonder shoppers report that the thing they want most from their favorite brands is consistent assurance. Shoppers agreed that when they use their favorite brand product, they enjoy a sense of well-being (51%) or they feel secure (51%). This most basic Maslow-ian need for safety, coupled with their contrasting lesser interest in brands that would help them stand out or shape their identity are evidence of the need for stability. Only 15% reported that their favorite brand provided a sense of thrill and only 12% said it helped them to stand out from the crowd.

Consumers aren't looking for hope or freedom or self-actualization from food and beverage products. In times of turmoil, people crave things they find trustworthy, such as consistent experiences from their favorite brands.

What do consumers trust about packaging?



Shoppers trust the ingredients and the brand.

Shoppers know that the ingredients listed on food and beverage packages are regulated by government organizations, such as the U.S. Food & Drug Administration, so it is quite logical that the ingredients are considered the most trusted information on the package. Shoppers agreed that they trust the ingredients listed on the package foremost (74%), nudging out the brand (71%). This also means shoppers trust the back label slightly more than the front label, which is dominated by marketing. Those labels are not mandated, but ingredients labels have laws and requirements. It is where brands are held accountable.

Shoppers also agree that they support brands that share their values, with 65% reporting so in our survey. This helps validate the value of corporate social responsibility within large fast-moving consumer goods (FMCG) companies.

Choosing sides

For example, in March of 2017, [General Mills' Honey Nut Cheerios](#) launched the "Bring Back the Bees" campaign to raise awareness of the declining pollinator population. The goal: Plant 200 million wildflowers for the pollinator habitat in North America. Shoppers helped surpass the goal and General Mills sent more than 1.5 billion seeds to shoppers in the effort to "Bring Back the Bees".



With popular values diverging and polarizing, this could also indicate that brands may have to "choose sides" on political issues, if they haven't already done so.

This delivers assurance to shoppers that their purchase is supporting causes that they care about, or perhaps more often, not supporting causes they don't want to support.



Another indication of consumer trust is the level of importance of package information

Shoppers trust the objective data on the package: the expiration date, the ingredients and nutrition facts. They consider these bits of information most important when searching for products on shelf.

Shoppers rank this basic information above practical concerns and both of those above brand. They seem to consider questions in a very pragmatic order, as below:

What is most important

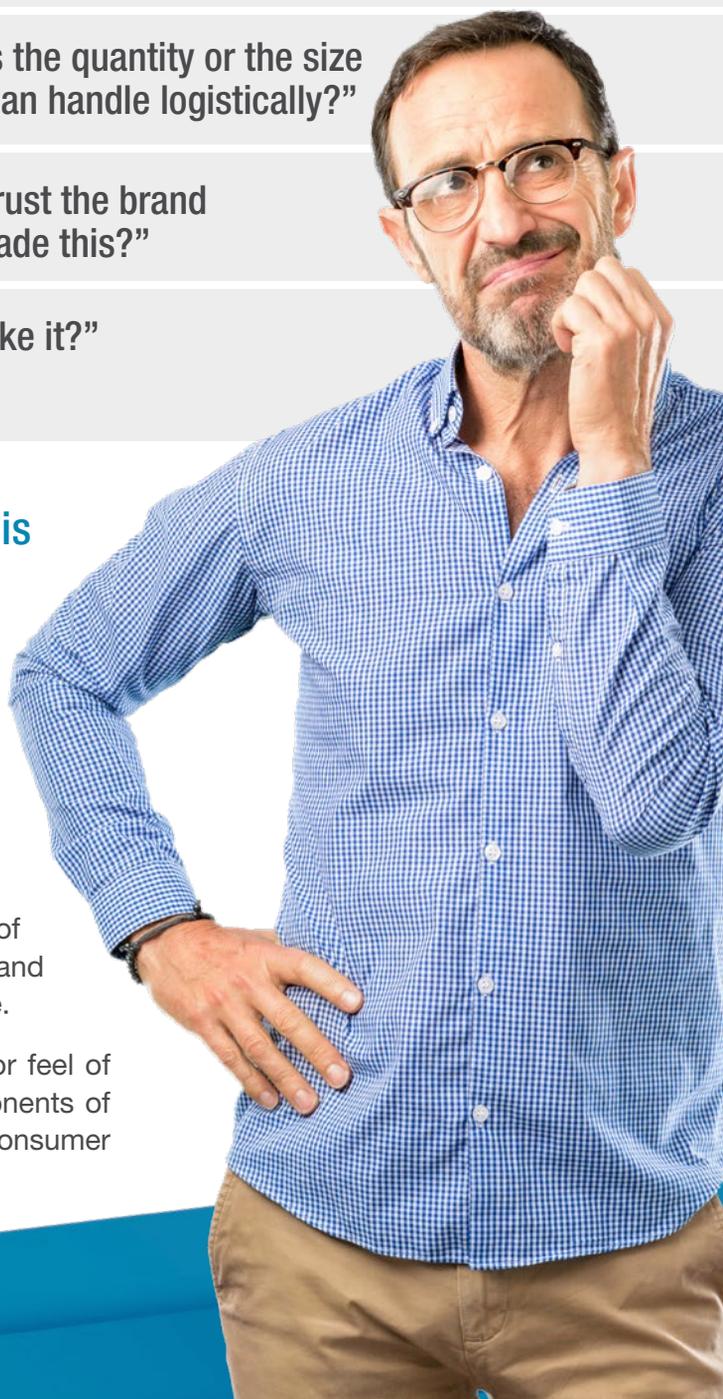
What consumers might be thinking

1  Expiration date	“Is this product spoiled?”
2  Ingredients and Nutrition Facts	“Can I put this in my body?”
3  Size/weight, Shape/form, Material	“Is this the quantity or the size that I can handle logistically?”
4  Logo/Brand Recognition	“Do I trust the brand that made this?”
5  Touch/Feel, Photos/Imagery	“Do I like it?”

The most important info on the package is also the very last touch the manufacturer gives to the product. The Expiration Date or Best Before Date printed at the very end of the packaging line is the make-or-break factor in purchase.

The Ingredients and Nutrition Facts are also very important to shoppers. These “data points” together rank far ahead of the more physical industrial design elements like the size and weight of the item, the packaging material and the 3D shape.

The brand elements like logo and imagery and the touch or feel of the item are less important than the more utilitarian components of the package. However, they too, have a clear impact on consumer behavior, and we will touch upon that later.



Shoppers find packaging fun!

Shoppers indicated that they find most food and beverage packaging to be fun and engaging. Two-thirds of the respondents placed all categories on the fun and engaging side versus the frustrating side.

Packaging is more than fun; it's like a present to the shopper, from the shopper. Opening a package is an experience a shopper can repeat routinely. Some brands tune into this experience in their marketing campaigns. For example, soda commercials featuring clicking of the pop can and the fizzy sound or the tearing of a potato chip bag. Creating engaging packaging that ideally extends the brand experience and solves a problem is the goal of every smart packaging creator.

Shoppers most often associated “fun and engaging” with the categories on which they spend their disposable income. These included:



Beer & Wine



Ice cream,
candy



Juice



Baby Food



What shoppers like and dislike about packaging

RELIABLE
RECYCLABLE
 SIZE
 BRIGHT
 STURDY
 EASY
 FUN
 COLORFUL
 NICE
 SECURE
 MINIMAL
 RESEALABLE
 STRONG
 CLEAN
 QUALITY
 COOL
 CONVENIENT

FLIMSY
 DARK
 WASTEFUL
 BULKY
 MESSY
 FLIMSY
 DARK
 NOTHING
 SMALL
 EXCESSIVE
 HEAVY
 BORING
 PLAIN
 PLASTIC
 OPEN

When shoppers think of packaging that they like, the number one word they freely associate is “**recyclable.**” Secondly, they mention easy (**simple**) and colorful (**bright and attractive**).

When shoppers think of packaging that they dislike, the two most frequently used words are “**bulky**” “**heavy**” and “**plastic.**” They also prominently associate words that convey poor or low quality like “**flimsy,**” “**ugly,**” “**cheap,**” “**dull**” and “**bland.**”

By far, the most frustrating packaging experiences shoppers reported among food and beverage categories were with meat and fish products. These are products that have changed very little in their design and are ripe for innovation.

Do shoppers really care about sustainability?

It's very interesting to think of translating these preferences into a structural packaging brief because of the tension between shoppers' preference for recyclable packaging and aversion toward the adjectives that typically describe recyclable materials.

According to our survey, 34% of respondents somewhat or strongly disagree that they don't like re-purposing the packaging, which could indicate that they prefer to toss recyclable packaging into a different bin for someone else to repurpose rather than think of ways to reuse the material themselves.

In other words, don't make it too hard for shoppers to do the right thing. They are more likely to recycle than to reuse or repurpose. This does not change the chance for repurposable or refillable items.



“Let Me Take a Selfie!”

Packaging impacts shopper’s digital behaviors

Smartphones are tools for information gathering and interaction, even when it comes to food and beverage packaging. Most shoppers are curious about how they can use their phones to get more value out of packaging.

Shoppers are trying out augmented reality apps. Many are scanning the bar code to add calories to their fitness or diet tracking program, or they are scanning the bar code to check themselves out at the retail store. They are photographing product packaging and, surprisingly, some are even taking selfies with products.

32%

of shoppers take a photo with their smartphone of a product.

37%

of shoppers have taken a photo with their smartphone to search for more information on the product.

Though they say the bar code is not important,

28%

of shoppers do use the bar code to look up calories or points or other information.

13%

of shoppers have taken a selfie with their food or beverage product in the past 3 months.

16%

of shoppers have used packaging with an augmented reality app.

23%

of shoppers used their smart phones to ring themselves out at the store using a retail store app.

While brands pay influencers to take selfies with their products, more consumers are also taking non-paid shots of some of their favorite products. If you can get shoppers to place your product in their selfie, they are saying the brand or product is part of their lifestyle, which is an indirect endorsement. Keep in mind that a hard to use, non-descript or ugly package usually won't make this cut. In a world of staged Instagram photos, each package must be visually appealing.

Inside the mind of the shopper in-store

No surprise here: packaging plays a role in differentiation, trial and advocacy within the walls of brick and mortar.

The in-store experience has long-held a major role in driving purchase behavior. In-store activities have a big impact on trial, with 20% of shoppers reporting they tried a new product specifically because of in-store taste samples or an in-store display. A key in-store goal for any CPG is to get the shopper to actually touch their package. The consumer is exponentially more likely to buy once they touch, and how the product looks and feels in their hand will make a big difference.

Shoppers look to packaging to inform their product purchases.

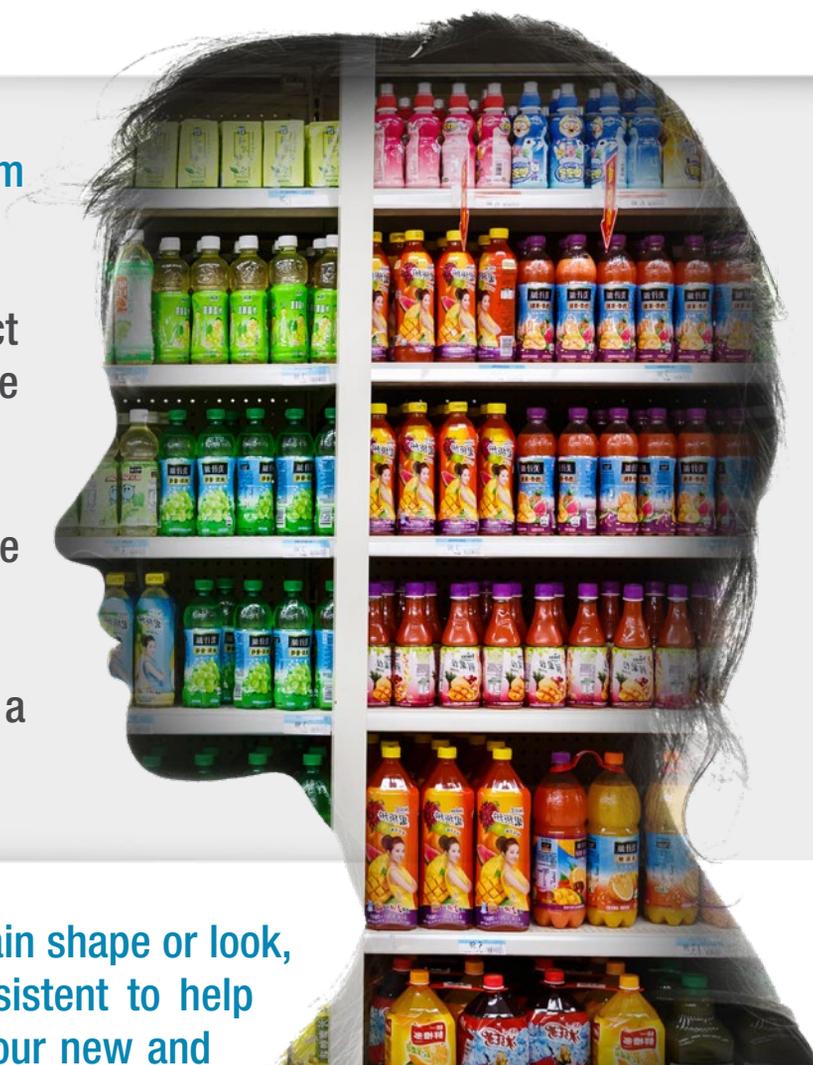
38% purchased a new product because they enjoyed the packaging.

28% switched brands because the packaging was different. This is where brand consistency plays a key role.

If your company is known for a certain shape or look, ensure that your packaging is consistent to help the shopper feel secure and trust your new and current offerings.

Twenty-two percent of shoppers said that they made a recommendation to a friend or colleague based on the package while they were in-store. Beyond peer recommendations, shoppers are looking at products on the shelf and searching online at the same time, for more information, better deals, reviews, etc.

Brand leaders must make it easy for the consumer to quickly cross between physical and digital channels with their product (via QR codes in-store and consistent packaging images online) to help control the marketing narrative and promote sales.



Why they buy online

People are purchasing food online and most of them like it. But how many people, and why?

Only 0.8% of people indicated that they haven't ever purchased any products from the food and beverage category online. As for those who purchase online they do so for price reasons, followed by the ability to buy products that they can't buy locally (availability) and only a third cite convenience as a reason. Forty-three percent of people say they shop online to get a better price.



What are they buying? Snacks are the products most purchased online, over all other food and beverage categories.

Seventy-five percent of shoppers stated they foresee purchasing more of these items online in the next 18 months, compared to 9% who disagreed. This is in line with data from [One-ClickRetail](#) that showed Amazon grocery sales growing [50% year-over-year](#). Snacks represented 38% year-over-year growth for Amazon.

Even though most primary shoppers have tried buying food and beverages online, 9% people say that buying these items online isn't their preference and they won't purchase this way in the future.



Mintel's take:

While this study's data indicates that most people have tried buying food and beverages online, some countries are perhaps more advanced than others in the adoption of purchasing online food and beverage. Some segments of the US population are slightly more likely to have purchased food and beverage products online.

Mintel's perspective is that the online food and drink category is ripe for opportunity if retailers can overcome consumer barriers to purchasing online. Some of the barriers Mintel's data are starting to shine light on specifically for the food and drink industry include:

- Consumers saying that they need to see the product before purchasing it
- A belief that some products are less expensive in store than online
- Concerns about shipping/returns

Packaging expectations of the online purchase

People expect the online to mirror the offline shopping experience. They expect continuity of brand and product regardless of whether they are surfing on their mobile phones or cruising the store aisles. Sixty-one percent of people expect the product packaging they see online to be exactly the same as what's on the shelf in their local store. Shoppers do not grasp the difficulty of the logistics required to pull off such consistency.

Peoples' expectations of packaging differ, though, when they buy online and have something shipped to their home.



Forty-seven percent of people expect the product image online to exactly match the product packaging that arrives on their doorstep, revealing that shoppers have more grace for things that are conveniently (and cheaply) delivered to their door.

This seems to indicate that what they buy in-store must be of a premium quality because they go purchase it, the product doesn't come to them at home. Minor variations are OK with 37% of shoppers. Only 9% are flexible in thinking that it's OK if the packaging is different in color or imagery.

Understanding shoppers' expectations of packaging for online purchases is important because of the outcome. Not meeting those expectations results in returned products.

Returns are very costly for online purchases due to double shipping and double warehouse expenses. Even top retailers are grappling with the cost of returns, as [Amazon spent USD \\$6.6 billion on delivery in 2014](#), yet only received USD \$3.1 billion in shipping fees.

Thirty-four percent of people surveyed had returned a product that they had purchased online because of the packaging. The biggest reason for return of online purchases was damage to the packaging (35% of those who returned). Additionally, 26% of people who had returned product based on the packaging reported that they did so because they thought it looked wrong or it was counterfeit.



According to General Manager of Pantone, Adrián Fernández, “In China and other countries where counterfeiting of products is common, the importance of the color consistency of the product packaging is much higher, as shoppers would make an assessment based on color characteristics online and still expect them to match when the product arrives on their doorstep.”

When recipients don't think they are getting the quality that was indicated by the online purchase experience, they reject the purchase and it costs brands and retailers serious revenue. [According to Inbound Logistics](#), the average retailer's reverse logistics costs for consumer goods are equal to an average 8.1% of total sales—a figure which, unlike forward logistics, includes the value of the goods. The consistency of the shopper-facing product image online with the physical package is absolutely critical to uphold to preserve profitability as more and more brands launch direct-to-shopper online purchase channels.

Takeaways: for marketing leaders and brand managers

1. Ensure each piece of packaging is glamor-shot ready.

It's clear that shoppers are interacting with product packaging using their smartphones. It's quite possible that any single unit of your product could be snapped by a shopper and put up on social media, turning your product into the star of a free ad. Is your packaging ready for its moment of fame? Consider how you might improve the consistent quality of the packaging you receive from your packaging manufacturer. Find technology that can assure the quality of each packaging piece or label before it is shipped for filling.

2. Match the information on the packaging with product page search engine optimization (SEO) efforts.

Shoppers will search for the product name and its image and ingredients on their phones while in the store, perhaps with voice commands. Make sure your product can easily be found through search engines and retail apps. This includes not just the words, but the product packaging images. People are searching based on visual appearance and photos, not only keywords. Can computer vision identify your product by its package?

3. Reduce losses from returned online purchases.

Marketers and brand managers can improve brand profitability by improving the protective qualities of the product packaging. Since the shipping of individual items subjects them to more strenuous conditions than items that are shipped in pallets, consider creating a slightly different package with stronger or reinforced material for e-commerce fulfillment.

4. Match e-commerce imagery with the product packaging that gets shipped.

One quarter of online purchasers that had returned items said they did so because it didn't "look right" or because it looked fake/counterfeit. In both cases, the appearance of the product online didn't match the actual appearance at fulfillment.

5. E-commerce product imagery should match what is available in-store.

Shoppers expect their digital and physical experience of the brand to be consistent, so adapt your e-commerce experience to only show what's available on the shelves of physical stores. Also make it clear to the shopper when the product images shown are slightly different from the actual product that will ship to them.



MONIQUE ACEVEDO

Vice President, Marketing - Nature's Bounty Company

Takeaways: for designers and strategists

1. Make sure you visually communicate that your product has credibility.

Consumers are looking for extra assurance when buying products they can't physically touch before buying, so make sure your branding and benefits are clear and consistent.

2. Brand consistency produces trust.

Consider introducing brand and packaging changes over time in an evolutionary approach. Remain aware that launching a dramatic refresh could disrupt the trust you've already established. Do so carefully.

3. Make labels easy to read.

Elements like expiration dates and claims make products more trustworthy to consumers, so make sure they are priority components of the packaging, and easy to find.

4. Sustainability messaging will create added value.

Don't be afraid to show and tell the shopper that your packaging is recyclable. Remember, the #1 thing shoppers reported about packaging they liked was "recyclable!"

5. Consider reducing the amount of marketing copy or "romance copy" on the package.

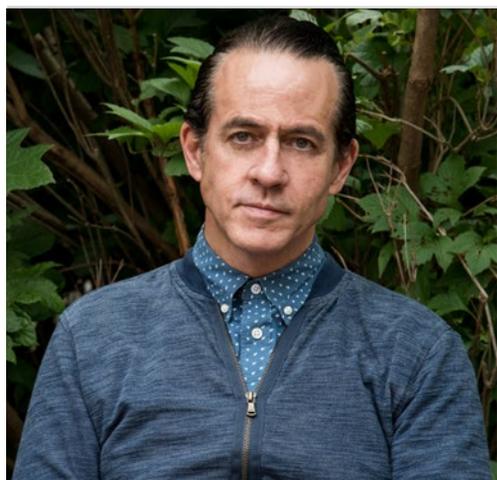
These statements carry little weight with shoppers and may just be cluttering your design.

6. Design packaging that is easy to use first.

Packaging that is airtight but too hard to open will frustrate the consumer more than the assurance it will provide.

7. Give packaging an own-able ritual.

Can you give consumers a way to interact with or open a package that recalls equities of the product or branding?



RANDY HERBERTSON

Principal - The Visual Brand

Takeaways: for packaging professionals

1. Be wary of changing packaging too much for e-commerce.

In the past, when new channels have emerged, such as club or value retail (dollar stores), specialized packaging was requested and sometimes necessary in order for brands to perform well in these new environments. One strategy for addressing e-commerce could be to follow the previous formula and create packaging for the growing channel. This is tempting, but remember that shoppers want the packaging that arrives at their door to be very similar to what they see online and in-store. Redesign carefully.

2. Consider sustainable materials for packaging, but don't over sacrifice cost or ease of use.

Consumers care about recyclable materials, but most are not yet to the point where they will pay more to get them, or live with inconveniences that can result from certain substrates (like less flexibility or product protection.)

3. Digitize all the tasks in the packaging value chain.

Remove the distance and waste in the process by using digital technologies. The information that's on the package needs to be shared with e-commerce so there is consistency across channels. Digitize the text, don't change it into a picture file. Let the ingredients and nutrition facts sell for you. People trust this information, so make sure they have access to approved versions of it in e-commerce product pages.



JOE PAGLIARO

President - 2940 LLC

Takeaways: for information technology professionals

1. Be the digital transformation leader your marketing and packaging colleagues need you to be.

Challenge their perceptions of what is possible with technology. Observe them doing their work and make a list of what might be digitized to help them get their work done faster at higher quality levels.

2. Innovation of process and tools used to make products is just as important as product innovation (new product development), and can often be the competitive advantage.

This study shows that the way people are shopping is changing, and our processes for creating and bringing products to market should evolve accordingly.

3. Digitize everything.

This is why: if you digitize a task, you can probably start to automate at least part of it, and then also connect the output of the task to other departments and systems that need that output. The output could be design files, product content, images, romance copy or other content that's on the package.

4. Eliminate sources of error whenever possible by mapping out your sources of truth.

For instance, instead of re-keying information on a package to complete item listings on e-commerce websites, consider connecting to the original source of the approved, high-quality information on the package.

5. Establish a current view of all the systems and software that support your packaging value chain.

Then, create a roadmap, from design to production to meet consumers' expectations.



ARUN SAKSENA

Chief Information Officer, Product Identification Platform at Danaher

Methodology

For this report, we conducted an online survey of shoppers, who self-reported as the primary shopper of fast-moving consumer goods or have shared shopping responsibilities. A random sampling was drawn from a list of approximately 4,004 shoppers; responses were obtained in the following settings. Sampling derived from 2,001 people in North America, 1,000 from France, United Kingdom, Germany and Spain, and 1,003 from China and Japan. Gender was split 47% Male and 53% Female. Age and income follows the bell curve of the United States 2016 Census.

About us

Pantone enables color-critical decisions, from inspiration to realization, for brand and manufacturers. Over 10 million designers and producers around the world employ Pantone products and services to communicate through color and control consistency across various materials and finishes. www.pantone.com

X-Rite is a global leader in the science and technology of color and appearance. X-Rite offers a full range of solutions used by manufacturers, retailers, printers, photographers and graphic design houses to achieve precise management and communication of color and appearance throughout their processes. X-Rite products and services are recognized standards in the printing, packaging, photography, graphic design, video, automotive, paints plastics, textiles and medical industries. www.xrite.com

Esko helps its customers to make the best packaging for billions of shoppers. Its software and hardware product portfolio supports and manages the packaging and print processes for brand owners, retailers, designers, pre-media and trade hops, packaging manufacturers and converters. For nine out of ten retail packages, Esko solutions are used in packaging management, asset management, artwork creation, structural design, prepress, 3D visualization, flexo plate making, workflow automation, quality assurance, sample-making, palletization, supply chain collaboration and/or the production of signage and displays. Enfocus, with its suite of automation solutions and PDF quality control tools for printers, publishers, and graphic designers, is an Esko subsidiary. MediaBeacon, with its digital asset management (DAM) solutions is also part of the Esko family. www.esko.com

AVT is the global leader in print process control, quality assurance and press control for the packaging label and commercial print industries. Backed by state-of-the-art technology and field-proven solutions, more than 7,000 AVT systems are installed at customer sites worldwide. AVT is headquartered in Hod-Hasharon, Israel, with sales marketing and support offices in the United States, Europe and China. www.avt-inc.com

Danaher is a global science and technology innovator committed to helping its customers solve complex challenges and improving quality of life around the world. As part of Danaher's Product Identification Platform, Esko, X-Rite, PANTONE, AVT, Videojet and Laetus all assist companies with brand identification and packaging solutions across all aspects of the value chain. www.danaher.com

Authors



DANIELLE SAUV 

Director, Customer Insights and Experience, Product Identification Platform, Danaher

Danielle Sauv  is a marketing technologist, writer and strategist for a collection of global companies owned by Danaher, including Pantone, MediaBeacon, Esko, X-Rite, AVT, Laetus and Videojet. Throughout her 16-year career, Danielle has held positions in many parts of the consumer packaging ecosystem: consumer goods manufacturer, promotional agency, brand strategy and package design firm, premedia firm and packaging management software start-up, giving her a uniquely broad perspective on simplifying the packaging value chain. Her packaging technology insights have been featured in The Dieline, FoodDive, MediaPost and Chief MarTec. Danielle earned her B.A. in English and Theater from Messiah College and now lives outside Chicago with her husband, four children, dog, fish, tortoise and bevy of musical instruments.



SHOSHANA BURGETT

Director of Corporate Strategy and Customer Insights for X-Rite

Shoshana Burgett is the Director of Corporate Strategy and Customer Insights for X-RitePantone. In that role, she is responsible for leading the corporate voice of the customer (VOC) initiative across all industries, including print & packaging, plastics, automotive, paint & coatings, textiles, cosmetics and more. Key to the role is gaining customer insights, identifying market trends both within and across segments, and helping the company to create innovative products that support emerging customer needs, now and into the future. Before joining X-Rite Pantone in 2011, Shoshana worked at Xerox for 14 years, where she held several senior roles in both U.S. and non-U.S. capacities. Shoshana is a well-known speaker at industry events with a particular focus on color measurement and management, color supply chain efficiencies, color measurement instrumentation and more.

About our contributors



JAMES D DOWNHAM

President & CEO, PAC, The Packaging Consortium

James Downham, President, PAC The Packaging Consortium has been dedicated to advancing the packaging community agenda. He is a passionate circular economy, sustainability and brand package design leader. Under Jim's leadership PAC has created several packaging programs including the PAC GLOBAL LEADERSHIP AWARDS; PAC NEXT and PAC FOOD Sustainability Programs; PACed Certificate Program; and the IFS PAC secure GFSI benchmarked food packaging safety standard; and intelliPACK, A Smart Packaging Innovation Catalyst. Jim is a former package manufacturing CEO & President and current industry non-profit CEO. He is Chairman of LeaderLinx, executive recruiter connecting leading companies with industry leaders. In 2014 Jim was inducted into the Packaging Hall of Fame.



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