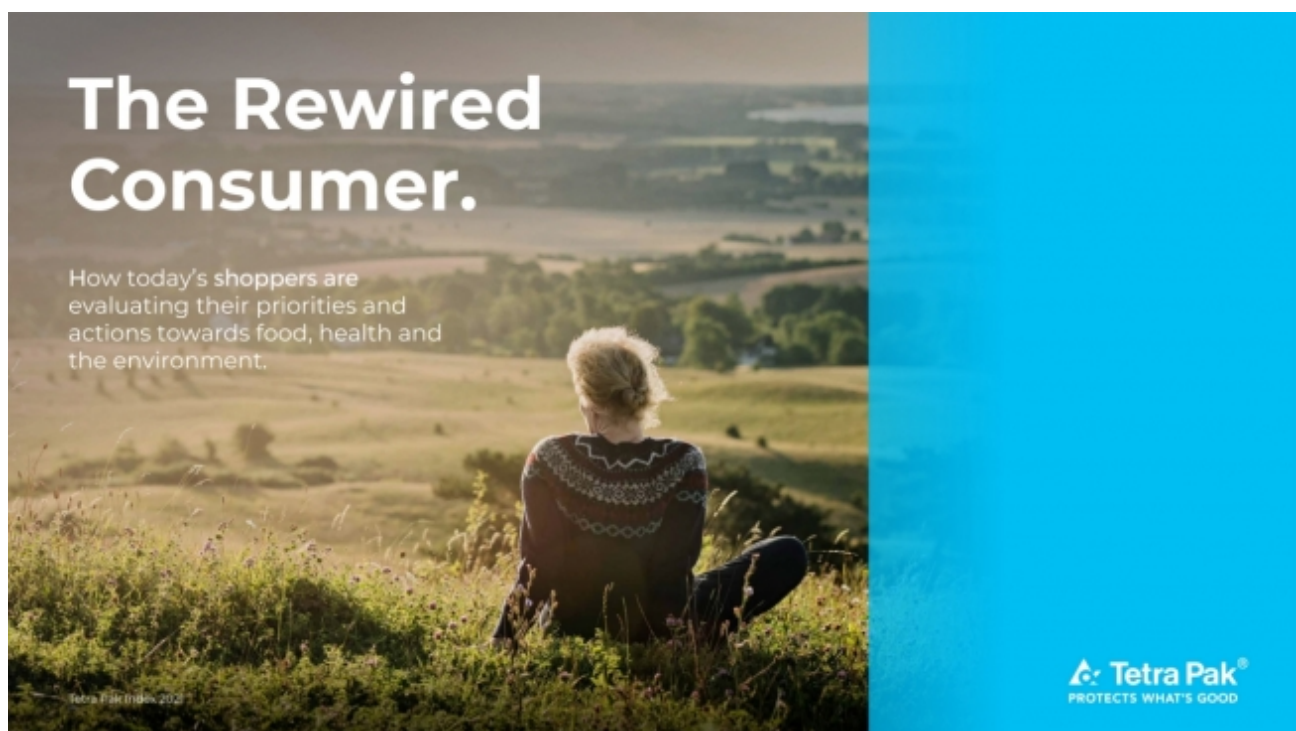


# Consumers 'Rewire' Priorities and Take Action on Environment, Waste and Health

Tetra Pak's 2021 Index explores how consumer motivation and behaviour is changing worldwide and how some of the trends will remain relevant in the post-pandemic world.

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Tetra Pak unveils how Covid-19 has made consumers rethink the way they live, and fundamentally shift how they act in the latest Tetra Pak Index report. The pandemic has reinforced the value consumers place on human connections, taking into account both time spent with family at home, and with extended circles outside it. Shared food and beverage experiences play a key role in these relations.

Fundamentally, the personal, economic and environmental fragility experienced during the global pandemic has created a shift from concern to active caretaking, and a desire to take action to keep ourselves, our food, our communities and the planet secure. Food safety and security<sup>4</sup> are top priorities too, with the pandemic shining a spotlight on health and highlighting weak points in our food systems. Worries about the environment are very strong, with pollution and plastic litter in the ocean as the joint top worry (83%) and Global warming closely follows, cited by over three quarters (78%) of consumers across nine countries. This sits ahead of food waste (77%) and food accessibility (71%).

Meanwhile, nearly half (49%) of the global population are now recognising the impact that everyday choices have on the environment.

**Adolfo Orive, President and CEO at Tetra Pak, comments:** “This year’s Tetra Pak Index reveals interesting insights around how consumers are adjusting their lifestyles in practical, everyday ways to make a positive difference, as they seek a more resilient and sustainable future. There is an evident increase in traditional ‘back-to basics’ values, including home cooking, eating with the family and minimising waste. From the choices they make at home, to which businesses they decide to buy from, the pandemic has reinforced responsible consumption as a key trend, with greater demand for action throughout society.”

“Responding to these needs and expectations requires long-term focus and a system-wide collaboration from all stakeholders. The UN has already called the 2020s the ‘Decade of Action’, emphasising the need to act now. As a purpose-led company and a global industry leader, we remain fully committed to play our part. We believe that the world’s food systems need to transform to meet the needs of society, improving food security while reducing the impact on natural resources. We therefore aim to focus on three key areas: increasing access to safe, nutritious food; reducing food loss and waste; and building more sustainable value chains.”

**Responsible consumption becomes mainstream** The lack of freedom and choice over the last 20 months has driven consumers to regain control and demand action to change the status quo, in whatever way possible. They are proactively looking for ways to make a difference in their own lives, in order to improve their own physical and mental wellbeing - such as through dietary choices - and in the environment around them, by recycling more and reducing waste. For example, 62% of consumers pay more attention to the quality of what they eat and drink, while 54% are throwing away less food now than before the pandemic. Notably, 72% agree that ‘individuals like me’ need to act now, or they will be failing future generations.

Consumers are also looking to businesses to lead the way and help them stabilise the new habits they form. Over one-third (35%) are more frequently choosing brands based on their sustainability credentials than before the pandemic, while one in two (50%) say being environmentally friendly is a top need for food packaging and 61% expect food and beverage companies to lead the way in finding solutions.

With more time being spent at home, the household waste “footprint” is more visible. In a bid to address this, consumers are adapting their routines. Over half (55%) are planning meals more carefully to avoid waste, while just under half (46%) are making a greater effort to sort materials such as cartons, glass and plastic properly for recycling since the

pandemic. One in two (50%) also say they are likely to recycle more in the next year as part of their personal contribution to tackling climate change.

**Rebuilding and supporting our societies**The pandemic has made people more thoughtful, with greater empathy for others. They have a new appreciation for meaningful connections with friends and family and beyond – and shared food and beverage experiences often play a key role in making these connections enjoyable and fun.

“Together out of home” consumption occasions have experienced the highest increase since the start of the pandemic, up by 56%<sup>3c</sup> which is why it is one of the opportunities highlighted in the report within habits. Another is shopping locally and sourcing local products demonstrating the growing link between the environment and society. Beyond immediate family and friends there is also a concerted effort to rebuild societies, with nearly a third (32%) actively influencing their community to reduce waste – signalling a movement of climate champions<sup>5</sup>. Indeed, in some regions such as the UK the environment has surpassed Covid-19 as the number one concern.

Consumers are looking for ways to transition from fragility to resilience. In their own lives, this translates to improving their own physical and mental wellbeing, through their choice of diet and ingredients. Since the start of the pandemic, consumers have experienced sweeping, rapid change, and made many sacrifices. What is clearly here to stay is that consumers are taking actions in their own lives to build a more sustainable future and expecting companies to do the same – as well as helping them in this mission.

**Find out more about Tetra Pak.**

## **NOTES TO EDITORS**

- The Tetra Pak Index, currently in its 14th iteration, is an annual report focused on providing insights into the global trends and opportunities shaping the future of the Food and Beverage industry. This year’s Tetra Pak Index conducted together with Ipsos has been based on several different sources of data and methodologies to ensure a comprehensive view of consumers’ attitudes, behaviours and values. Including in-depth virtual qualitative discussions where consumers have shared their spontaneous views about their lives in combination with large scale online studies to get robust and statistically significant results. Analysing this evolution, as well as talking in depth with consumers, shows that some behaviors are here to stay, and these have been identified as the sticky trends.
- These “sticky trends” are expected to last beyond the COVID-19 pandemic, along with the opportunities that each trend presents, in three key areas: home, health and the environment.

- The findings of the 2021 study, conducted by Ipsos, have been compiled based on data from the following inputs:
  - Global research on consumer attitudes, comprising 500 online interviews in each of the following markets: Brazil, United States, China, South Korea, India, South Africa, Nigeria, UK and Spain. (Ipsos)
  - Mobile Ethnography: A qualitative study in partnership with Ipsos, involving 10 consumers per market across four countries - Spain, US, China, Nigeria - with 5 days interaction with consumers via mobile. (Ipsos)
  - Demand Spaces; 22,500 interviews across 9 countries (Brazil, China, Egypt, Germany, India, KSA, Sweden, USA, Vietnam). In this study, we analysed beverage consumption moments and grouped them by occasion and need. From this emerged 12 Demand Spaces (Ipsos)
  - Immunity boosting consumer research, 800 respondents per Country in 9 markets (USA, Brazil, Germany, UK, Ukraine, India, China, South Africa, Turkey) (Lexis)
  - Culinary consumer research, 1000 interviews per country in 7 markets (USA, China, Japan, KSA, UK, Spain, Brazil) (Ipsos)
  - E-commerce consumer research, 1200 respondents per country in 10 markets (Germany, UK, China, Japan, Brazil, Mexico, Turkey, Saudi, South Africa, France) (Lexis)
  - Sustainable Packaging Consumer Research 2021, in addition to the above research for this Index, we conducted our latest environmental survey in Summer 2021, comprising a total of 12,000 consumer interviews based on an online questionnaire in 24 countries: Germany, France, UK, Italy, Saudi Arabia, Turkey, South Africa, China, India, Japan, Australia, Brazil, USA, Mexico, Chile, Poland, Sweden, Spain, Russia, Greece, Serbia, Repubblica Dominicana, Argentina (Lexis)
  - Desk Research A thorough review of existing data and reports. (Ipsos)
- The pandemic is an extraordinary event, affecting communities worldwide. It has administered a profound shock on multiple levels - to the economy, to food systems and to personal freedoms - in addition to its impact on global health. As a result of this life changing period this year's Index reveals a rewiring of the global consumer motivations, with as much as 60% of consumers believe that the pandemic has seriously disrupted the food supply system.
- Additional research conducted by Ipsos for the Global Commons Alliance backed up some of these trends, with 73% of people globally wanting human wellbeing and protecting and regenerating nature prioritised over economic growth and profit and 83% are willing to do more to become better 'planetary stewards'
- The sticky trends identified in the Tetra Pak Index 2021 report are as follows:

- Habits and Home redefined – New routines and rituals; Renaissance of home cooking; Online grocery goes mainstream; Digitalisation and data; Social reconnect
- Health, from protection to prevention – Personalised health; functional care; Mental health in the spotlight
- Environment, the biggest focus ever – Concern for climate change; worries about waste; Avoiding over-packaging; Keeping it local

**MEDIA CONTACTS****Jane Jarosz**Tetra PakTel: +39 059 89 8954

**Natalie Pearson**Ipsos Knowledge Centre

**PR Agency Contact:****Dani Marks**Brands2Life for Tetra PakTel: +44 207 592 1200

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