

Research into the APPEAL OF AEROSOLS TO PACKAGING SPECIFIERS



Summary

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1. Objectives

- 1.1 The research was conducted to test the appeal, strengths and weaknesses of aerosols to a range of existing and potential specifiers : a mix of companies that market, manufacture, retail and design packaged goods.
- 1.2 To form the basis for a communications strategy for the aerosol industry.

2. Method

- 2.1 Telephone interviews were conducted with randomly selected Marketers/Manufacturers, Retailers and Designers who are involved with packaging and design decision-making. The questionnaire is shown in the Appendix.
- 2.2 Lists were provided by BAMA and its members.
- 2.3 Of the 108 respondents, 20 were later interviewed in greater depth, again by telephone, as the basis for verbatim comments and publicity material. These interviews are shown in the Appendix.
- 2.4 Note that the data has been segmented by Marketers/Manufacturers (including those who sub-contract manufacture), Retailers and Designers and that the respective sub-samples are 33, 20 and 55.

- 2.5 These sub-sample sizes should be treated with caution, but give guidance to differences by segment.
- 2.6 Detailed data are available in the Computer Tables Appendix.

3. Who did the researchers talk to?

3.1 Respondents comprised (there is some overlap within Design and again also within Marketing/Manufacturing):



- Design agencies 51%
- Specialist functional pack design agencies 6%
- NPD agencies 4%
- Retailers with own label ranges 19%
- Marketers of packaged goods who manufacture 19%
- Marketers of packaged goods who sub-contract 11%

4. Who has worked with aerosols?

- 4.1 Over half have worked with aerosols (58%), but the figure is far higher for Marketers/Manufacturers (91%) than for Retailers (65%) or for Designers (36%).
- 4.2 Slightly less than half (46%) have worked with aerosols in the past year and again the figures vary with Marketers/Manufacturers at 85%, Retailers at 55% and Designers at 20%.

5. What's good about aerosols?

- 5.1 Aerosols are particularly easy to operate (69%) and this is particularly apparent to Marketers/Manufacturers and to Retailers.
- 5.2 Other benefits are in efficiency, controlled delivery and visual appeal on the shelf.
- 5.3 In general, Designers are less aware of the appeal of aerosols, which may reflect their relative lack of experience with the format in some cases.

6. What's not so good about aerosols?

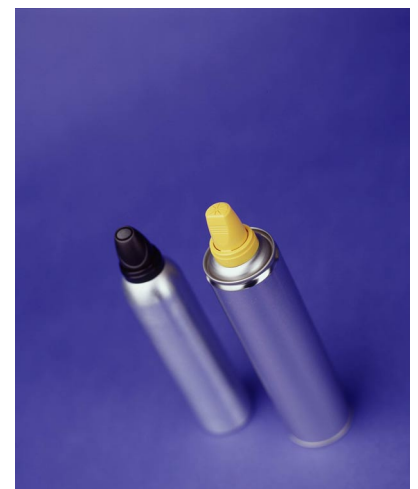
- 6.1 The association with CFCs is mentioned spontaneously as a disadvantage by 44% of respondents.
- 6.2 This is followed by flammability and going off unexpectedly, which are problems for Retailers in particular.
- 6.3 Indeed the Retailers who have the products out on view to the consumer worry more about most things, including the propellant material used.
- 6.4 While CFCs and damage to the ozone layer move down a little on prompting, they are still a problem; again for Retailers more than for others.
- 6.5 Solvent abuse is also a concern for Retailers in particular.

7. What else do the trade think about aerosols?

- 7.1 Sixty nine percent of respondents believe aerosols have potential to be used in a wider range of categories.
- 7.2 Fifty five percent believe they are more versatile than most marketing people think.
- 7.3 But only 36% believe aerosols have recovered their reputation after negative CFC publicity.

8. What about the competition?

- 8.1 Respondents were asked about pumps & triggers, roll-ons & sticks, bottles & jars and wipes in relation to aerosols.
- 8.2 Efficient performance : all formats do their job well, but aerosols do it best, ahead of pumps & triggers.
- 8.3 Aesthetic appeal : bottles & jars narrowly lead pumps & triggers and aerosols.
- 8.4 Adding value : pumps & triggers and aerosols lead bottles & jars and wipes, followed by roll-ons & sticks.
- 8.5 Easy to use : all formats are easy to use, but aerosols are seen as easiest of all.



- 8.6 Stops product getting on fingers : aerosols are clearly the best in this case.
- 8.7 Easy to specify : bottles & jars are easiest to specify, with wipes hardest. This may not be related to technical issues, but rather to the narrower use of wipes or their inappropriateness to certain products.
- 8.8 Environmental soundness : this is the one area in which aerosols perform really poorly. Roll-ons & sticks and bottles & jars perform relatively well, ahead of pumps & triggers and wipes.

9. What products do respondents work with?

- 9.1 The major areas of involvement of the sample are anti perspirants and bath & shower foams.
- 9.2 Marketers/Manufacturers and Retailers are involved in more product areas than Designers.

10. Where's the growth potential?

- 10.1 The greatest growth potential for aerosols is seen to be in pharmaceuticals.
- 10.2 Marketers/Manufacturers and Retailers see less potential for growth than Designers who are less directly involved with aerosols.

10.3 Those who see potential in their own businesses base this once again on the convenience of operation, appeal to consumers, efficiency and flexibility of aerosols.

10.4 Where there are drawbacks to aerosols these are based on the need for NPD, competition from alternative formats and the CFC/ozone issue (for some Designers).

10.5 These problems, and particularly the CFC/ozone issue, may not be key within respondents' own businesses, but they are seen as issues for industry in general which mean that

Marketers/Manufacturers and Retailers may understand CFC/ozone issues, but believe other people do not.



11. Are specifiers getting the information they need?

11.1 Less than half of respondents say they get all of the information they need about aerosols. While this varies by segment, as many as one third of Marketers/ Manufacturers, two-fifths of Retailers and three-quarters of Designers say they receive inadequate information.

11.2 Only one-third is regularly contacted by aerosol manufacturers: over half of Marketers/Manufacturers and Retailers, but less than 10% of Designers.

11.3 Almost all respondents want more information about aerosols in one form or another: in particular about new shapes, new materials and new actuators.

11.4 In general there is a demand for information about NPD and about environmental issues where confusion still exists, particularly among Designers, but also implicitly among consumers.

12. The role of design agencies

12.1 Design agencies themselves believe they do a good job of advising clients; the clients are less certain about this.

12.2 Where design companies work well, it is in the areas of technology and engineering ie they should know how to make aerosols or other packaging formats work from a functional point of view and not just visually.

13. Trade press

13.1 The Marketers/Manufacturers tend to see Packaging Magazine; Soap, Perfumes, Cosmetics; Marketing; Marketing Week; and more.

13.2 The Retailers tend to see The Grocer; Marketing; Marketing Week; Packaging Today; Packaging Magazine; and more.

13.3 The Designers tend to see Design Week; Marketing; Marketing Week; and more.

13.4 In NPD news terms the key magazines tend to be Packaging Magazine and Packaging Today for Marketers/Manufacturers, The Grocer and Packaging Today for Retailers and Design Week for Designers.

14. **Awareness of BAMA**

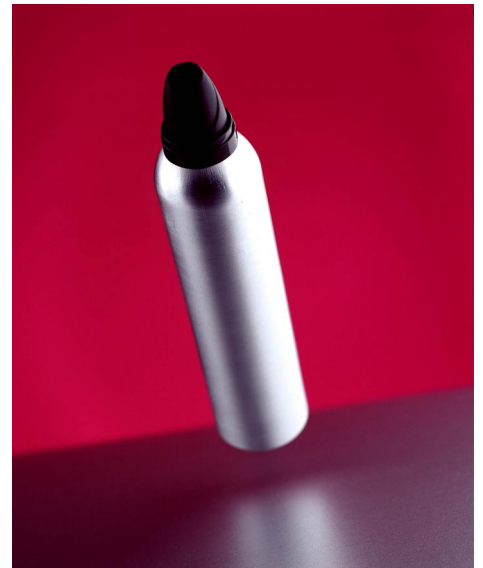
14.1 Two-thirds of the sample had heard of BAMA before the survey.

14.2 But this differs between Marketers/Manufacturers and Retailers at nine-tenths and Designers at less than one-third.

15. **S.W.O.T. analysis**

15.1 Strengths of aerosols

- Ease of operation
- Controlled delivery
- Aesthetic appeal
- Efficient performance
- Stops product getting on fingers
- Consumer acceptance



15.2 Weaknesses of aerosols

- Perceived association with CFCs
- Flammability
- Going off unexpectedly
- Solvent abuse
- Heightened fears of Retailers about products on shelves
- Ignorance amongst Designers

15.3 Opportunities

- Use in wider range of categories
- Particularly in pharmaceuticals
- Rectification of misconceptions about CFCs among Designers and the public
- Opportunity for NPD in shapes, sizes and actuation

15.4 Threats

- Continued misconceptions about environmental soundness among some professionals and by inference among consumers
- Bottles & jars in aesthetic appeal, ease of specification and overall appeal to the Designers
- Perceived lack of growth potential of aerosols : a perception that aerosols have reached the mature stage of their lifecycle

16. Public relations opportunities

16.1 The urgent job is to change perceptions among the public and among Designers about CFCs.

16.2 If the public get the message then the problem with the trade should disappear as a consequence.

16.3 The research has pointed to a need to reassess the current consumer perception of aerosols. In particular, is what the professional specifiers and designers fear ('consumer believe



some aerosols may contain CFCs and damage the ozone layer') really true? Do consumers worry about flammability, solvent abuse and recyclability? Do these issues affect their disposition to buy other formats in preference to aerosols? Only possession of this information can tell BAMA whether the priority should be publicity aimed at consumers or at the trade. If a consumer survey (which could be economically conducted using an Omnibus service) shows that the problem is negligible in the consumer's mind, then the professionals need to know this. If the consumer survey shows there are problems in the consumer's mind, then BAMA has to address the consumer before moving on to the professionals

16.4 Perhaps labelling has to change so that CFCs are not mentioned. If they aren't there, why say anything? Research is required among consumers to get to the bottom of the labelling issue.

16.5 PR should also focus on the big opportunities:

- Wider range of category usage for aerosols
- Use in 'new' areas such as pharmaceuticals
- All manner of NPD, but particularly in shapes, sizes and actuation

16.6 The research suggests the potential for newsletters or more ad hoc releases to 'talk aerosols'. Where possible, this should go beyond the marketing people to the design, technical and purchasing people who can play an important part in specifying and influencing packaging decisions.

16.7 From the 20 depth interviews, perhaps 10 people have emerged who have useful and positive things to say and who may be prepared to form a longer term 'sounding board' for the activities of BAMA.