RESEARCH INTO THE APPEAL TO PACKAGING SPECIFIERS OF AEROSOLS

Prepared for: BAMA
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SUMMARY

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. **<u>Who did the researchers talk to</u>?**

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. **<u>Who has worked with aerosols</u>?**

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. **<u>What's good about aerosols</u>?**

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. **<u>What about the competition</u>?**

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. <u>Are specifiers getting the information they need</u>?

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 are 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. <u>The role of design agencies</u>?

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 their 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.

MAIN REPORT

1. OBJECTIVES

1.1 To test the appeal to specifiers of aerosols as a delivery vehicle for a wide range of products.

1.2 To test the strengths and weaknesses of aerosols and to compare them with other packaging formats.

1.3 To create a basis for strategy for the marketing of aerosols, in particular for public relations activity.

2. METHOD

2.1 BAMA prepared a list of c. 600 named individuals in packaged goods manufacturing and marketing, retailing of own label products, and design.

2.2 A letter was sent from BAMA to these 600 individuals explaining the survey and asking for their co-operation (May 2003).

2.3 A telephone interview was conducted with a random selection of 108 of the 600 names (May – June 2003).

2.4 A request was made to respondents for a follow-up interview to be conducted at Stage 2 seeking further depth as well as verbatims to use in publicity.

2.5 Twenty follow-up telephone interviews were conducted July 2003.

2.6 The report appendices show the questionnaire, detailed computer tables with breaks by segment and by involvement in aerosols, and verbatim responses to questions asked at the second stage.

MAIN FINDINGS

- Data shown in summary form with breaks by:
  - Marketers/Manufacturers (ie manufactures or sub-contracts)
  - Retailers with own label range
  - Designers : agencies of varying types
- Smaller sub-samples should be treated with caution
- Most tables are shown in % format
- Others use rating scales (1 – 5 or 1 – 10)
- Bases shown at heads of tables
- One * = significant at the 95% level
- Two ** = significant at the 99% level
- Data shown in detail with segment breaks in separate Appendix document

3. <u>WHO DID THE RESEARCHERS TALK TO</u>?

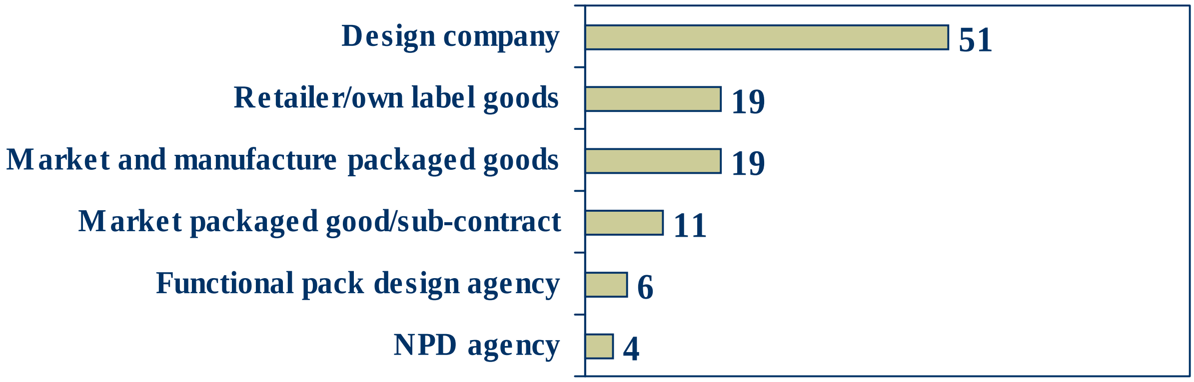
Q1 <u>Which one of these descriptions best fits your organisation</u>?

Base : all respondents

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Design company	51	0	0	100
Retailer with own label range	19	0	100	0
Manufacture and market packaged goods	19	64	0	0
Market packaged goods which are sub-contract manufactured	11	36	0	0
Specialist functional pack design agency	6	0	0	11
NPD agency	4	0	0	7

- The sample comprises a slight majority of design and NPD companies
- And a slight minority of marketers and retailers
- A small minority of respondents fall into more than one category, in particular marketing companies who manufacture or sub-contract manufacture and design agencies who may also be specialist in functional pack design or NPD

% (n = 108)



Design company
51
Retailer/own label goods
19
Market and manufacture packaged goods
19
Market packaged good/sub-contract
11
Functional pack design agency
6
NPD agency
4

4. WHO HAS OR HASN'T WORKED WITH AEROSOLS?

Q2A Has your company ever worked on or produced products in aerosol packaging?

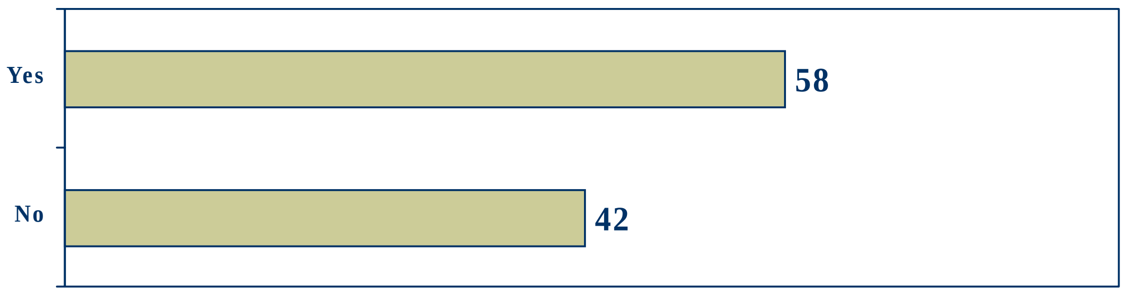
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Have worked on aerosols	58	91	65	36
Have not worked on aerosols	42	9	35	64

- A majority of respondents have worked on aerosols at some time
- 91% of Marketing/Manufacturing companies
- 65% of Retailers
- But only 36% of Designers which helps to account for some of their ignorance and misconceptions about aerosols

% (n = 108)



Q2B <u>Has your company worked on or produced products in aerosol packaging in the past year</u>?

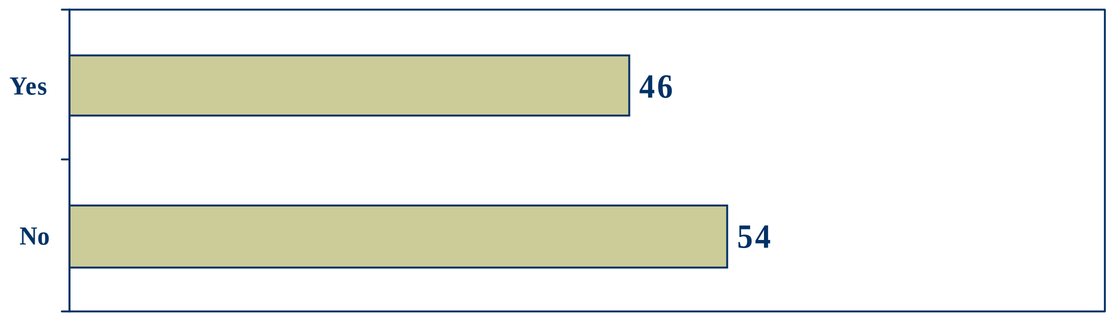
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Have worked on aerosols in the past year	46	85	55	20
Have not worked on aerosols in the past year	54	15	45	80

- A slight minority have worked on aerosols in the past year
- But 85% of Marketers/Manufacturers and 55% of Retailers have . . . .
- While only 20% of Designers have : which again helps to account for their relative ignorance about the format

% (n = 108)



5. WHAT'S GOOD ABOUT AEROSOLS?

Q3 Spontaneously mentioned advantages of aerosols

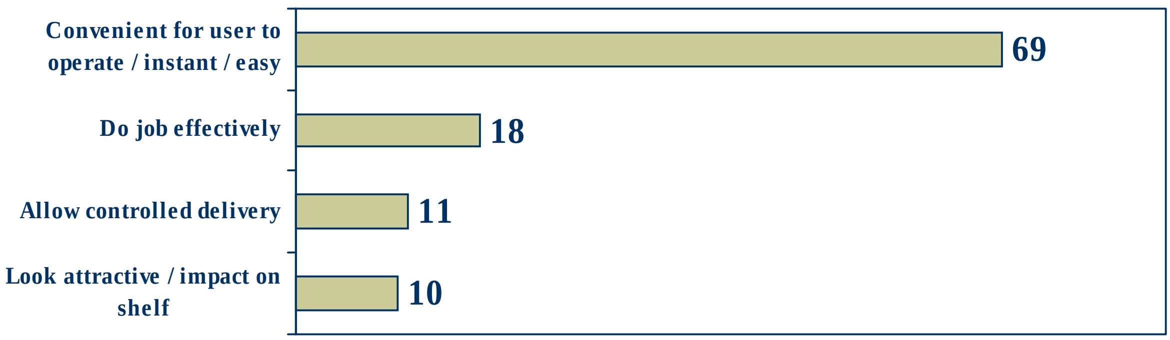
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Convenient	69	79	90	55
Do job effectively	18	15	25	16
Controlled delivery	11	15	5	11
Shelf appeal	10	12	25	4
Higher margins	6	12	5	4
Consumers understand them	6	15	0	4
Clean/hygienic	6	6	15	4
Consumers like them	6	6	10	4

- Two thirds of respondents spontaneously mention convenience for the user and this is particularly important for Retailers (90%) and Marketers/Manufacturers (79%)
- Convenience is supported by effectiveness, controlled delivery and visual appeal on shelf

% (n = 108)



"Consumers like their refreshing burst. They are easy to spray. The general convenience. And families can share them hygienically . . . . an aerosol spray is cooler, more refreshing and tends to feel less wet" Manufacture and Market Packaged Goods

"The range of products they can contain. Versatility in terms of products. You can dispense things from aerosols that cannot be used otherwise. They have a good shelf life. Ease of use and understanding. Known technology for consumers" Design Company

"For anything that involves a spray, an aerosol is unbeatable. For alcohol-based formulas which cannot be put through a pump spray. An aerosol spray is nice and dry when it goes on, whereas a pump is like being wet. An aerosol spray is quick drying" Market and sub-contract Manufacture

"Ease of application for all of the products in the range . . . . their advantages are in direct application, robust comparative to plastics and good for styling products" Manufacture and Market Packaged Goods

"From a technical point of view it's the consistency of delivery of aerosols. Their ability to deliver a product in a certain way . . . . the lack of effort needed and the product is so convenient" Design Company

Q4 Prompted advantages of aerosols

Base : all respondents

Respondents were then prompted with a list of potential advantages of aerosols and asked on a 5 point scale how big an advantage each one was:

%

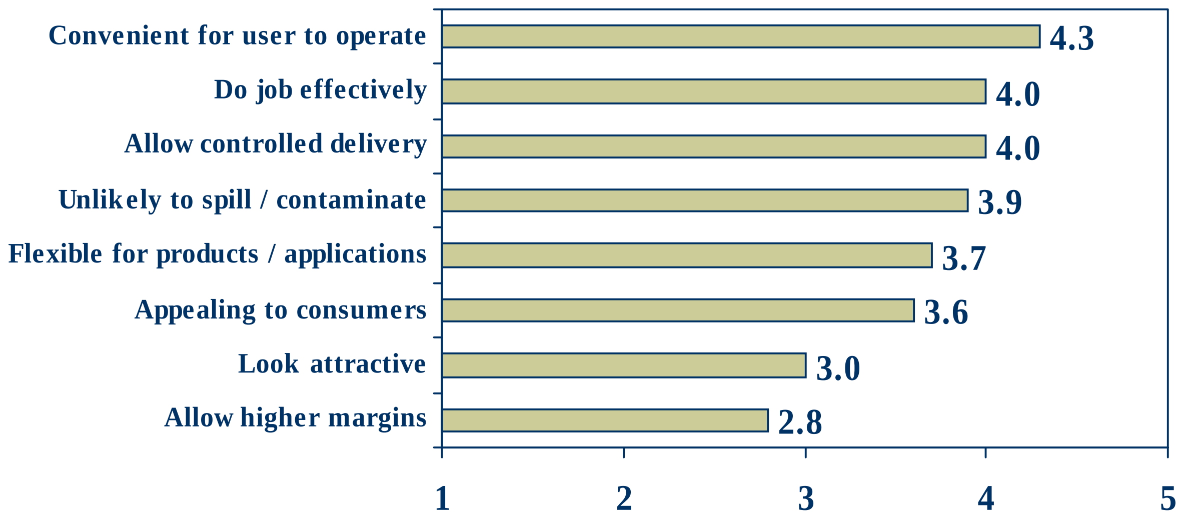
Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols look attractive					
Major advantage	5	11	3	15	15
	4	28	30	40	22
	3	29	30	10	35
	2	16	15	25	13
Minor advantage	1	16	21	10	15
DK/NS		1	0	0	2
Mean score		3.0	2.8	3.3	3.1
Aerosols are convenient for the user to operate					
Major advantage	5	47	48	65	40
	4	35	36	25	38
	3	12	9	10	15
	2	4	6	0	4
Minor advantage	1	1	0	0	2
DK/NS		1	0	0	2
Mean score		4.3	4.3	4.6	4.1

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols do their job effectively				
Major advantage 5	34	39	50	25
4	33	42	30	29
3	24	15	15	33
2	5	3	5	5
Minor advantage 1	1	0	0	2
DK/NS	3	0	0	5
Mean score	4.0	4.2	4.3	3.8 *
Aerosols are appealing to consumers				
Major advantage 5	21	21	20	22
4	31	27	50	27
3	32	33	30	33
2	10	15	0	11
Minor advantage 1	3	3	0	4
DK/NS	2	0	0	4
Mean score	3.6	3.5	3.9	3.5
Aerosols allow controlled delivery in terms of direction and volume				
Major advantage 5	38	45	55	27
4	35	36	40	33
3	17	9	5	25
2	6	3	0	11
Minor advantage 1	3	6	0	2
DK/NS	1	0	0	2
Mean score	4.0	4.1	4.5 *	3.7 **

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
<u>Aerosols allow for higher profit margins</u>				
Major advantage 5	8	3	10	11
4	18	24	5	18
3	28	24	30	29
2	24	33	35	15
Minor advantage 1	12	15	15	9
DK/NS	10	0	5	18
Mean score	2.8	2.7	2.6	3.1
<u>Aerosols are unlikely to lead to spillage or contamination</u>				
Major advantage 5	31	33	45	25
4	37	48	35	31
3	19	9	15	27
2	6	9	0	7
Minor advantage 1	5	0	5	7
DK/NS	1	0	0	2
Mean score	3.9	4.1	4.2	3.6 *
<u>Aerosols are very flexible and suit a wide range of products and applications</u>				
Major advantage 5	28	27	25	29
4	31	33	30	31
3	25	24	25	25
2	12	15	20	7
Minor advantage 1	3	0	0	5
DK/NS	1	0	0	2
Mean score	3.7	3.7	3.6	3.7

- The main advantage on prompting is convenience of operation (82% see this as an advantage)
- Followed by allow controlled delivery (73%)
- And doing the job effectively (67% agree)
- The different segments see the advantages of aerosols slightly differently : for example, Retailers highly value user convenience and controlled delivery and in general perceive aerosols in a favourable light
- Designers are least aware of the advantages listed

% (n = 108)



6. WHAT'S NOT SO GOOD ABOUT AEROSOLS?

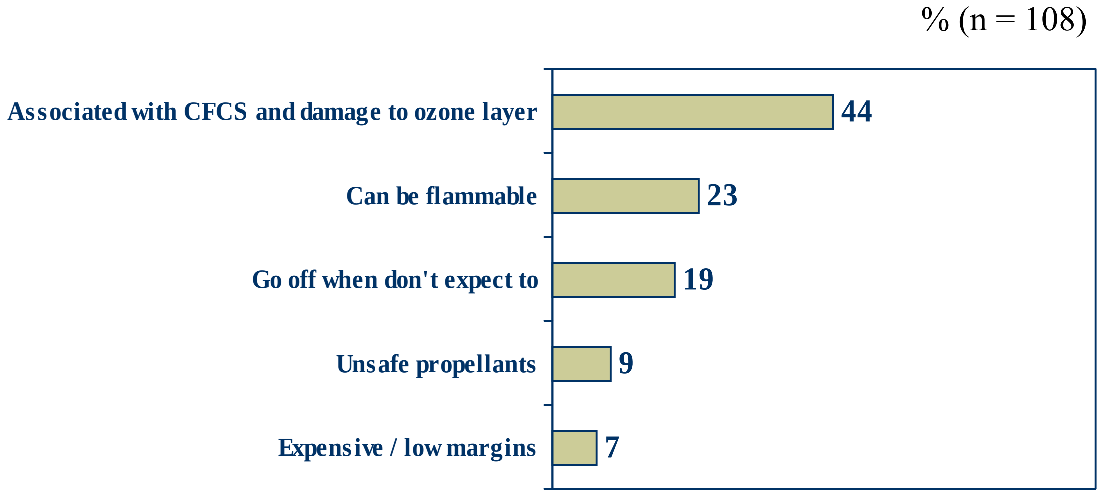
Q5 Spontaneously mentioned disadvantages of aerosols

Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Associated with CFCs/damage to ozone layer	44	42	40	47
Can be flammable	23	33	40	11
Go off unexpectedly	19	18	40	13
Propellants	9	6	20	7
Low margins	7	18	0	4
Distribution problems	6	12	5	4
Solvent abuse	6	3	10	5

- Over 40% of respondents spontaneously mention associations with CFCs and damage to the ozone layer. While the problem is more marked for Designers, at least 40% of all three groups mention the issue
- Flammability is also a problem, particularly for Retailers and to a lesser degree for Marketers/Manufacturers
- Aerosols going off unexpectedly is a particular problem for Retailers
- Indeed Retailers have considerably more concerns in general than Marketers/ Manufacturers or Designers
- It is noticeable that for the Designers the CFC/ozone issue is key and far outstrips any other issue



"There's the consumer perception about CFCs. Butane is flammable. People have environmental concerns. Recycling may be a problem" Design Company

"Aerosols can't be used for transparent packs and there is a slight stigma for environmentally friendly users which still exists" Market and sub-contract Manufacture

"People still remember damage to the ozone layer and people still think that Big Business is out to make money. People continue to think businesses will use damaging products if it is at all allowed" Market and sub-contract Manufacture

"Most consumers don't know (about aerosols and CFCs). Most manufacturers do not put CFCs in cans any more. It's the history of them that stays in the consumer's mind. There was a furore about CFCs in the past" Manufacture and Market Packaged Goods

"In an enclosed space they can be overpowering. Health and Safety have to be a strong consideration in their use" Design Company

Q6 Prompted disadvantages of aerosols

Base : all respondents

Respondents were then prompted with a list of potential disadvantages of aerosols and asked on a 5 point scale how big a disadvantage each one was:

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosol technology is too complicated to deal with					
Major disadvantage	5	8	6	0	13
	4	6	0	20	5
	3	26	12	30	33
	2	23	30	15	22
Minor disadvantage	1	34	52	35	24
DK/NS		2	0	0	4
Mean score		2.3	1.8 **	2.4	2.6 *
Aerosol technology doesn't suit certain types of product					
Major disadvantage	5	14	18	15	11
	4	26	18	25	31
	3	37	39	40	35
	2	18	21	15	16
Minor disadvantage	1	5	3	5	5
DK/NS		1	0	0	2
Mean score		3.3	3.3	3.3	3.3

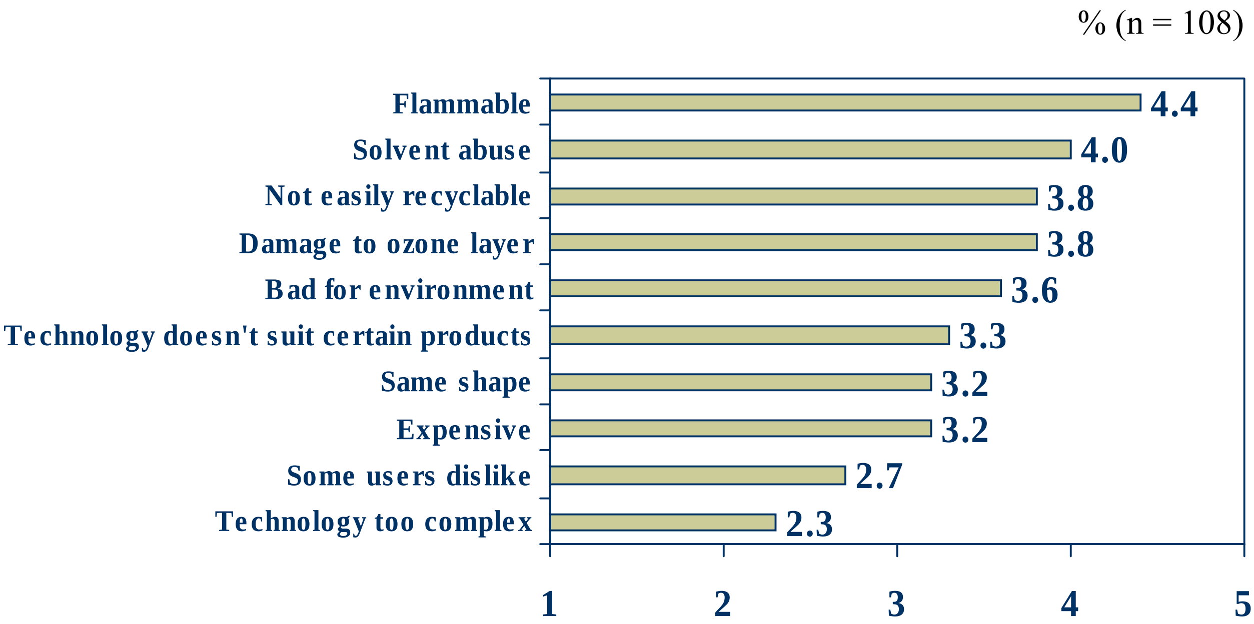
Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
<u>Aerosol packaging is expensive</u>				
Major disadvantage 5	9	12	10	7
4	27	33	40	18
3	38	36	20	45
2	15	12	25	13
Minor disadvantage 1	6	3	5	7
DK/NS	6	3	0	9
Mean score	3.2	3.4	3.3	3.1
<u>Aerosols are all more or less the same shape</u>				
Major disadvantage 5	18	15	10	22
4	29	30	30	27
3	23	12	35	25
2	14	18	0	16
Minor disadvantage 1	15	21	25	7
DK/NS	2	3	0	2
Mean score	3.2	3.0	3.0	3.4
<u>Aerosols can be flammable</u>				
Major disadvantage 5	59	52	75	58
4	24	30	15	24
3	9	9	5	11
2	3	3	0	4
Minor disadvantage 1	3	3	5	2
DK/NS	2	3	0	2
Mean score	4.4	4.3	4.4	4.4

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols are associated with solvent abuse					
Major disadvantage	5	49	45	60	47
	4	24	24	30	22
	3	12	12	10	13
	2	12	15	0	15
Minor disadvantage	1	3	3	0	4
DK/NS		0	0	0	0
Mean score		4.0	3.9	4.5	3.9
Aerosols are not easily recyclable					
Major disadvantage	5	25	24	25	25
	4	51	39	45	60
	3	12	18	20	5
	2	7	15	0	5
Minor disadvantage	1	5	3	10	4
DK/NS		0	0	0	0
Mean score		3.8	3.7	3.8	4.0
Aerosols are associated with CFCs and damage to the ozone layer					
Major disadvantage	5	45	39	55	45
	4	18	6	25	22
	3	18	27	5	16
	2	8	12	5	7
Minor disadvantage	1	11	15	10	9
DK/NS		0	0	0	0
Mean score		3.8	3.4	4.1	3.9

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols are bad for the environment in general				
Major disadvantage 5	29	18	50	27
4	30	18	25	38
3	23	21	20	25
2	11	27	5	4
Minor disadvantage 1	7	15	0	5
DK/NS	0	0	0	0
Mean score	3.6	3.0 **	4.2 *	3.8
Some users don't like aerosols				
Major disadvantage 5	11	12	5	13
4	17	18	10	18
3	26	15	30	31
2	25	33	20	22
Minor disadvantage 1	21	21	35	16
DK/NS	0	0	0	0
Mean score	2.7	2.7	2.3	2.9

- The biggest prompted problem is flammability (83% see it as a disadvantage)
- Other problems are solvent abuse (73%), recyclability (76%) and damage to the ozone layer (63%)
- It is noticeable that while CFCs and damage to the ozone layer is the biggest unprompted problem this diminishes in importance on prompting

- Retailers are especially sensitive to flammability, solvent abuse and damage to the ozone layer and indeed to environmental issues in general
- Designers’ responses to the disadvantages of aerosols are fairly average although they do see the technology as a little complex
- Marketers/Manufacturers are least worried about aerosols



7. WHAT ELSE DO THE TRADE THINK ABOUT AEROSOLS?

Q7 Level of agreement with prompted statements about aerosols

Base : all respondents

The next step was to put a list of prompted statements to respondents and to ask whether they agreed or disagreed:

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols have an undeservedly poor reputation					
Agree strongly	5	8	15	10	4
	4	35	18	35	45
	3	22	27	35	15
	2	24	27	15	25
Disagree strongly	1	9	12	5	9
DK/NS		1	0	0	2
Mean score		3.1	3.0	3.3	3.1
Aerosols have potential to be used in other product categories than they currently are					
Agree strongly	5	14	18	10	13
	4	55	55	60	53
	3	10	3	10	15
	2	17	18	20	15
Disagree strongly	1	3	6	0	2
DK/NS		2	0	0	4
Mean score		3.6	3.6	3.6	3.6

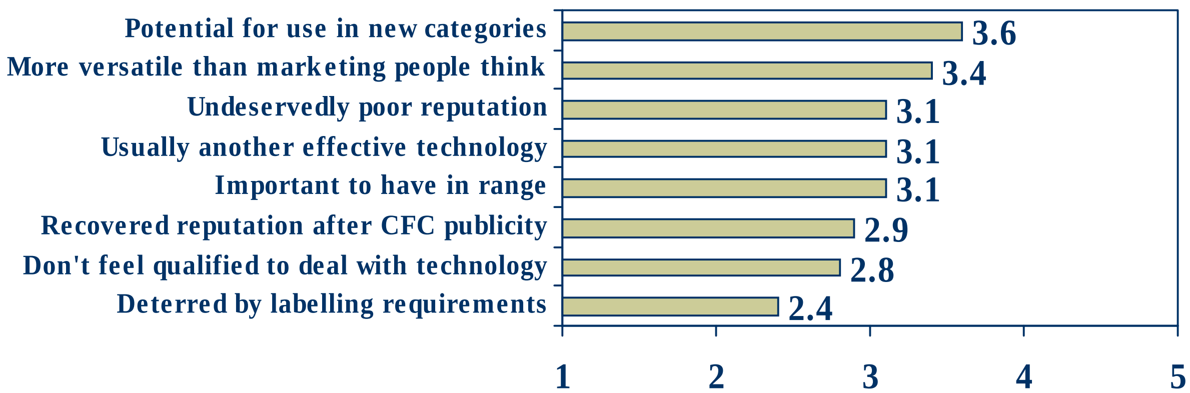
Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
I don't specify aerosols as much as I could because I don't feel equipped to deal with the technology				
Agree strongly 5	6	3	0	11
4	32	12	45	40
3	16	18	30	9
2	23	15	10	33
Disagree strongly 1	21	52	15	5
DK/NS	1	0	0	2
Mean score	2.8	2.0 **	3.1	3.2 **
Where you could use an aerosol there's usually another technology that is effective, such as pumps or triggers				
Agree strongly 5	16	12	20	16
4	30	18	20	40
3	8	15	15	2
2	33	27	35	36
Disagree strongly 1	11	24	10	4
DK/NS	2	3	0	2
Mean score	3.1	2.7 *	3.1	3.3

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Aerosols are more versatile than marketing people tend to think					
Agree strongly	5	6	12	0	5
	4	49	36	50	56
	3	20	18	40	15
	2	13	15	10	13
Disagree strongly	1	6	12	0	5
DK/NS		5	6	0	5
Mean score		3.4	3.2	3.4	3.5
Aerosols have recovered their reputation after negative CFC publicity					
Agree strongly	5	8	9	5	9
	4	28	27	15	33
	3	14	24	10	9
	2	42	30	60	42
Disagree strongly	1	6	6	5	5
DK/NS		3	3	5	2
Mean score		2.9	3.0	2.5	3.0
I'm deterred from specifying aerosols because of all the requirements for statutory warnings and labelling in general					
Agree strongly	5	7	3	10	9
	4	17	9	5	25
	3	18	12	40	13
	2	24	27	15	25
Disagree strongly	1	31	42	25	25
DK/NS		4	6	5	2
Mean score		2.4	2.0 *	2.6	2.7

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
<u>It's important to have an aerosol in a packaged goods range where possible</u>				
Agree strongly 5	14	18	15	11
4	21	24	20	20
3	31	24	40	33
2	23	15	25	27
Disagree strongly 1	6	9	0	7
DK/NS	4	9	0	2
Mean score	3.1	3.3	3.3	3.0

- The statements produced few strong feelings in either direction
- Respondents certainly do not seem to be deterred from specifying aerosols by requirements for statutory warnings and labelling in general (although Designers might be more worried)
- Respondents do see potential for wider use of aerosols (and this is probed further in Section 10)

% (n = 108)



8. HOW DO AEROSOLS COMPARE

Respondents were asked to give simple yes, no or maybe answers to a standard list of questions for a range of packaging modes starting with pumps and triggers

Pumps and triggers

Base : all respondents

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Efficient performance					
Yes	(+1)	67	61	75	67
Maybe	(0)	26	27	25	25
No	(-1)	7	12	0	7
Mean score		+0.6	+0.5	+0.8	+0.6
Aesthetically pleasing					
Yes	(+1)	39	30	40	44
Maybe	(0)	48	61	55	38
No	(-1)	13	9	5	18
Mean score		+0.3	+0.2	+0.4	+0.3
Adds value to products					
Yes	(+1)	39	39	55	33
Maybe	(0)	46	45	40	49
No	(-1)	15	15	5	18
Mean score		+0.2	+0.2	+0.5	+0.1
Easy to use					
Yes	(+1)	69	70	85	62
Maybe	(0)	11	12	0	15
No	(-1)	20	18	15	24
Mean score		+0.5	+0.5	+0.7	+0.4

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Stops product getting on fingers				
Yes (+1)	31	39	30	25
Maybe (0)	39	27	20	53
No (-1)	31	33	50	22
Mean score	0.0	+0.1	-0.2	0.0
Easy to specify				
Yes (+1)	73	67	60	82
Maybe (0)	16	27	30	4
No (-1)	10	6	10	13
Mean score	+0.6	+0.6	+0.5	+0.7
Environmentally friendly				
Yes (+1)	49	64	75	31
Maybe (0)	26	21	5	36
No (-1)	24	15	20	31
Mean score	+0.3	+0.5	+0.6	0.0 **

The strengths of pumps and triggers lie in:

- Efficient performance
- Ease of specification
- Ease of use

Roll-ons and sticks

Base : all respondents

%

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Efficient performance				
Yes (+1)	61	67	65	56
Maybe (0)	28	21	25	33
No (-1)	11	12	10	11
Mean score	+0.5	+0.5	+0.6	+0.5
Aesthetically pleasing				
Yes (+1)	31	30	30	31
Maybe (0)	40	45	35	38
No (-1)	29	24	35	29
Mean score	0.0	+0.1	-0.1	0.0
Adds value to products				
Yes (+1)	19	24	10	18
Maybe (0)	32	18	45	36
No (-1)	49	58	45	45
Mean score	-0.3	-0.3	-0.4	-0.3
Easy to use				
Yes (+1)	79	76	95	75
Maybe (0)	17	18	5	20
No (-1)	5	6	0	5
Mean score	+0.7	+0.7	1.0	+0.7

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
<u>Stops product getting on fingers</u>				
Yes (+1)	37	45	40	31
Maybe (0)	19	12	35	18
No (-1)	44	42	25	51
Mean score	-0.1	0.0	+0.2	-0.2
<u>Easy to specify</u>				
Yes (+1)	76	73	65	82
Maybe (0)	16	15	30	11
No (-1)	8	12	5	7
Mean score	+0.7	+0.6	+0.6	+0.7
<u>Environmentally friendly</u>				
Yes (+1)	56	73	70	40
Maybe (0)	38	18	20	56
No (-1)	6	9	10	4
Mean score	+0.5	+0.6	+0.6	+0.4 *

The strengths of roll-ons and sticks lie in:

- Ease of use
- Ease of specification
- Efficient performance
- Environmental friendliness

Bottles and jars

Base : all respondents

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Efficient performance					
Yes	(+1)	61	64	50	64
Maybe	(0)	28	15	45	29
No	(-1)	11	21	5	7
Mean score		+0.5	+0.4	+0.5	+0.6
Aesthetically pleasing					
Yes	(+1)	54	39	35	69
Maybe	(0)	33	36	45	27
No	(-1)	13	24	20	4
Mean score		+0.4	+0.2 *	+0.2	+0.7 **
Adds value to products					
Yes	(+1)	29	27	10	36
Maybe	(0)	46	36	60	47
No	(-1)	25	36	30	16
Mean score		0.0	-0.1	-0.2	+0.2 *
Easy to use					
Yes	(+1)	60	61	50	64
Maybe	(0)	31	27	45	29
No	(-1)	8	12	5	7
Mean score		+0.5	+0.5	+0.5	+0.6

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Stops product getting on fingers				
Yes (+1)	10	15	5	9
Maybe (0)	15	6	15	20
No (-1)	75	79	80	71
Mean score	-0.6	-0.6	-0.8	-0.6
Easy to specify				
Yes (+1)	81	79	65	89
Maybe (0)	16	21	30	7
No (-1)	3	0	5	4
Mean score	+0.8	+0.8	+0.6	+0.9
Environmentally friendly				
Yes (+1)	61	70	35	65
Maybe (0)	23	15	15	31
No (-1)	16	15	50	4
Mean score	+0.5	+0.5	-0.2 **	+0.6

The strengths of bottles and jars lie in:

- Ease of specification
- Ease of use
- Environmental friendliness (although Retailers might disagree)

It is also clear that Designers like the format very much

Wipes

Base : all respondents

%

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Efficient performance				
Yes (+1)	57	64	60	53
Maybe (0)	35	30	30	40
No (-1)	7	6	10	7
Mean score	+0.5	+0.6	+0.5	+0.5
Aesthetically pleasing				
Yes (+1)	31	30	30	33
Maybe (0)	38	42	40	35
No (-1)	31	27	40	33
Mean score	0.0	0.0	0.0	0.0
Adds value to products				
Yes (+1)	27	30	15	29
Maybe (0)	46	36	40	55
No (-1)	27	33	45	16
Mean score	0.0	0.0	-0.3 *	+0.1
Easy to use				
Yes (+1)	80	76	80	82
Maybe (0)	16	15	15	16
No (-1)	5	9	5	2
Mean score	+0.8	+0.7	+0.8	+0.8

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Stops product getting on fingers				
Yes (+1)	10	12	15	7
Maybe (0)	17	15	25	15
No (-1)	73	73	60	78
Mean score	-0.6	-0.6	-0.5	-0.7
Easy to specify				
Yes (+1)	60	48	55	69
Maybe (0)	33	39	45	25
No (-1)	6	12	0	4
Mean score	+0.6	+0.4	+0.6	+0.7 *
Environmentally friendly				
Yes (+1)	31	36	40	25
Maybe (0)	34	36	35	33
No (-1)	33	27	25	40
Mean score	0.0	+0.1	+0.2	-0.1

The strengths of wipes lie in:

- Ease of use
- Ease of specification
- Efficient performance

Aerosols

Base : all respondents

%

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Efficient performance				
Yes (+1)	85	94	90	78
Maybe (0)	11	3	5	18
No (-1)	4	3	5	4
Mean score	+0.8	+0.9	+0.9	+0.7
Aesthetically pleasing				
Yes (+1)	44	55	40	40
Maybe (0)	41	42	50	36
No (-1)	15	3	10	24
Mean score	+0.3	+0.5 *	+0.3	+0.2 *
Adds value to products				
Yes (+1)	39	55	50	25
Maybe (0)	41	24	40	51
No (-1)	20	21	10	24
Mean score	+0.2	+0.3	+0.4	0.0 *
Easy to use				
Yes (+1)	91	100	100	82
Maybe (0)	5	0	0	9
No (-1)	5	0	0	9
Mean score	+0.9	+1.0 *	+1.0	+0.7 **

Statement	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
<u>Stops product getting on fingers</u>				
Yes (+1)	64	82	80	47
Maybe (0)	19	12	10	27
No (-1)	17	6	10	25
Mean score	+0.5	+0.8 **	+0.7	+0.2 **
<u>Easy to specify</u>				
Yes (+1)	56	52	50	60
Maybe (0)	35	33	45	33
No (-1)	9	15	5	7
Mean score	+0.5	+0.4	+0.5	+0.5
<u>Environmentally friendly</u>				
Yes (+1)	10	21	10	4
Maybe (0)	27	21	15	35
No (-1)	63	58	75	62
Mean score	-0.5	-0.4	-0.7	-0.6

The strengths of aerosols lie in:

- Ease of use
- Efficient performance
- Stops product getting on fingers
- Ease of specification

"The benefit of aerosols (relative to other formats) is in the range of products they can contain. Their versatility in terms of product range. You can dispense things from aerosols that cannot be used otherwise. They have a good shelf life, ease of understanding and use (as well as) known technology for consumers" Design Company

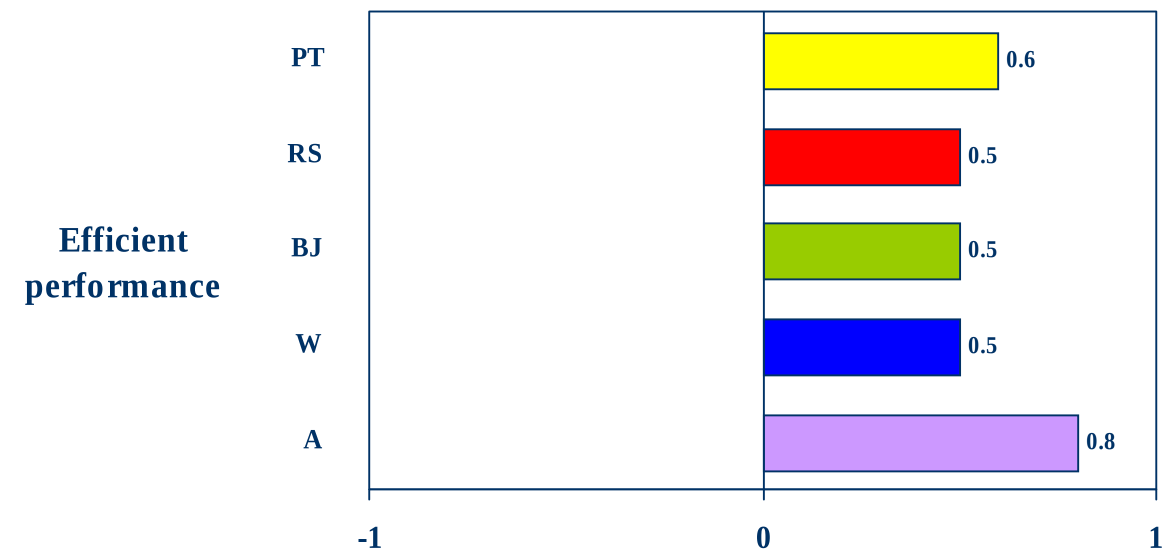
Summary of descriptors which apply to the various types of packaging

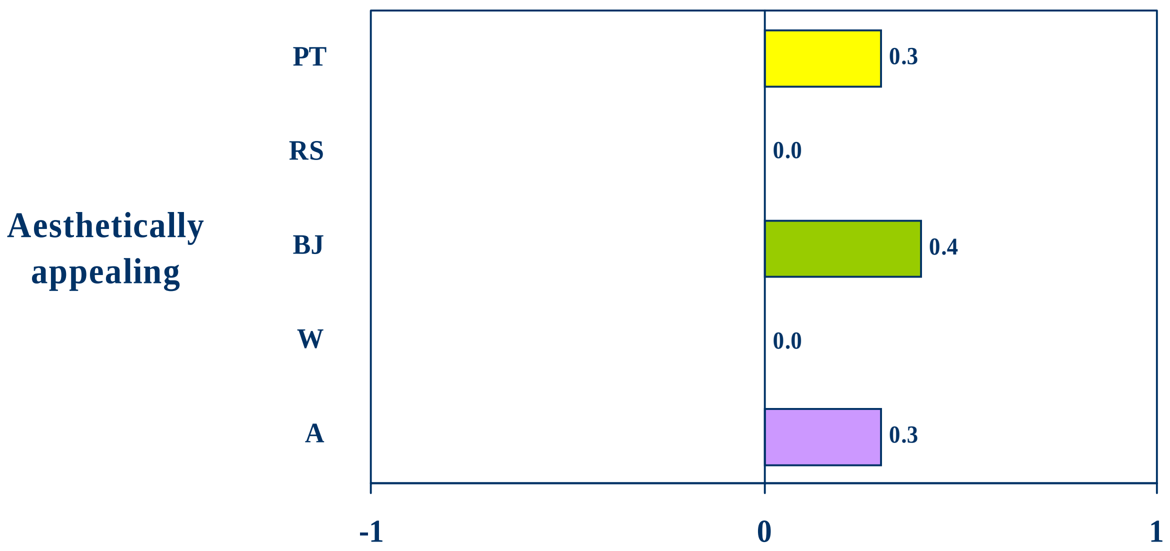
Base : all respondents

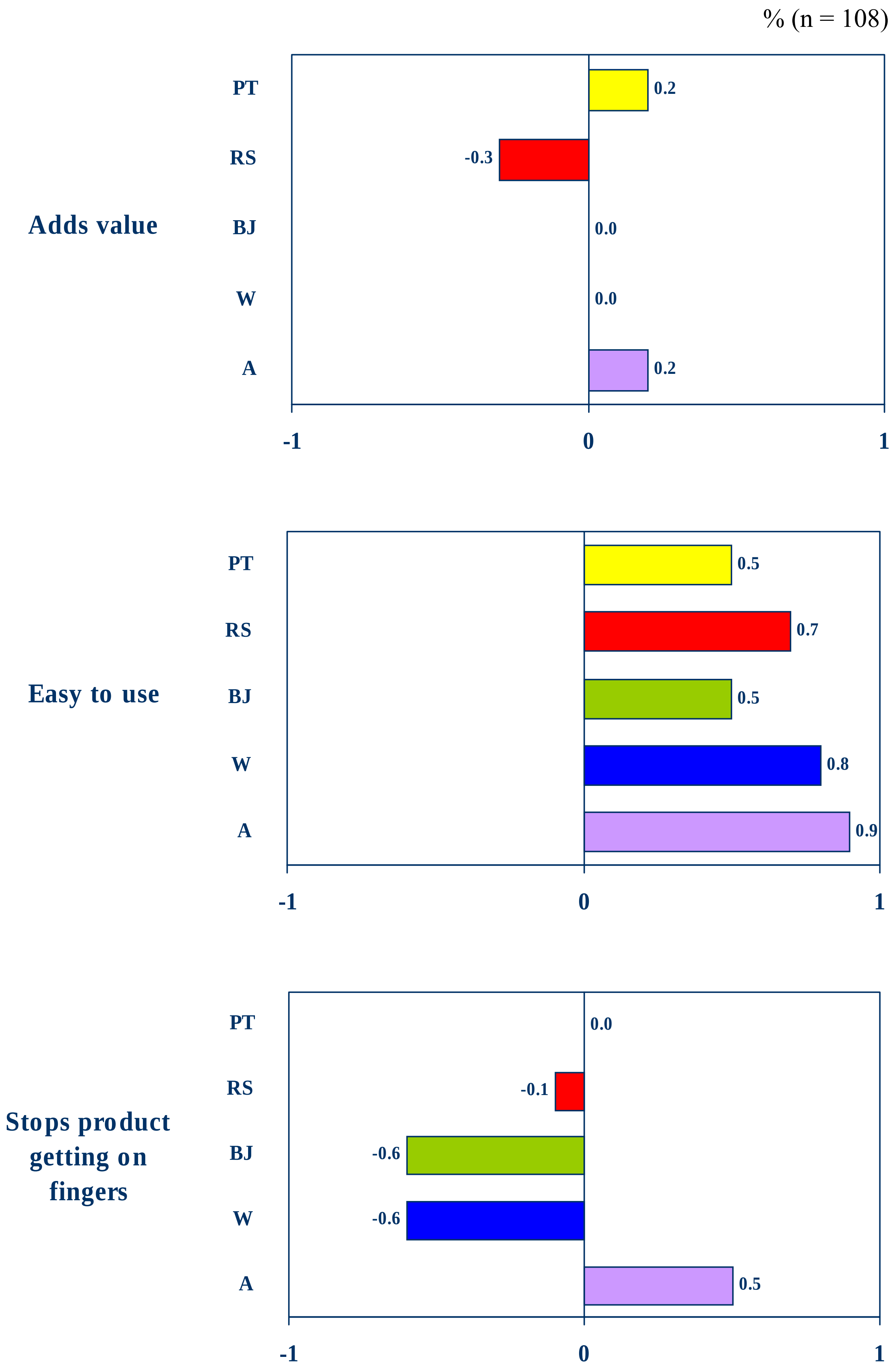
In the bar charts that follow each pack format is rated from +1 (Yes) to -1 (No)

- PT = Pumps & Triggers
- RS = Rolls-ons & Sticks
- BJ = Bottles & Jars
- W = Wipes
- A = Aerosols

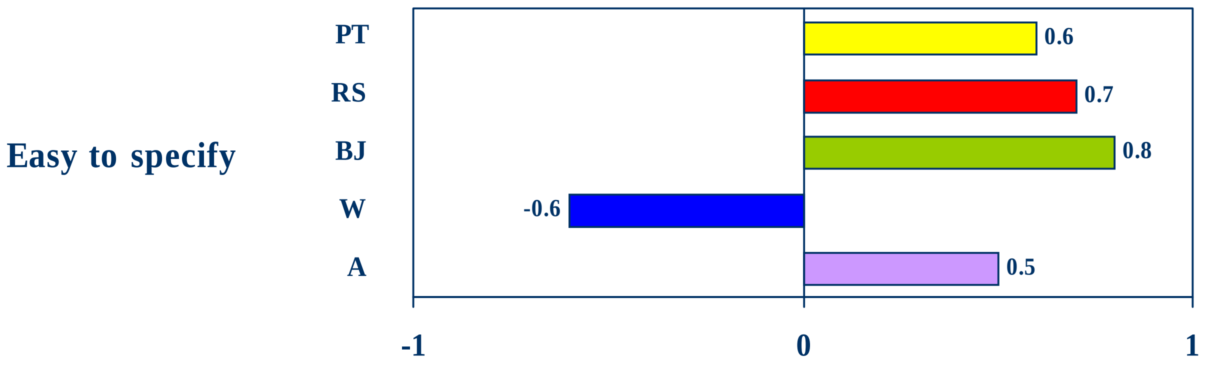
% (n = 108)

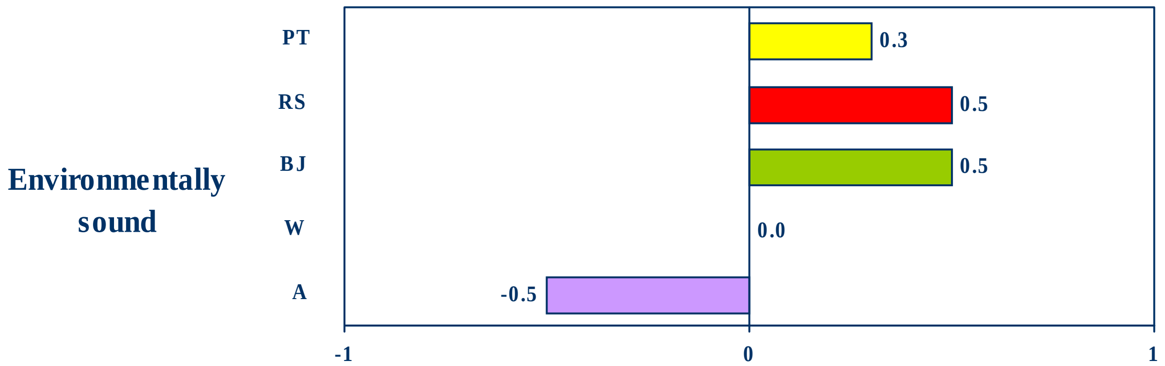





% (n = 108)
Adds value
PT
RS
BJ
W
A
0.2
-0.3
0.0
0.0
0.2
-1
0
1
Easy to use
PT
RS
BJ
W
A
0.5
0.7
0.5
0.8
0.9
-1
0
1
Stops product getting on fingers
PT
RS
BJ
W
A
0.0
-0.1
-0.6
-0.6
0.5
-1
0
1

% (n = 108)


Easy to specify
PT
RS
BJ
W
A
0.6
0.7
0.8
-0.6
0.5
-1
0
1


Environmentally sound
PT
RS
BJ
W
A
0.3
0.5
0.5
0.0
-0.5
-1
0
1

9. WHAT PRODUCTS DO RESPONDENTS WORK WITH?

Q9A Which of these product areas has your organisation been involved in in the past year, whether it involved aerosols or not?

Base : all respondents

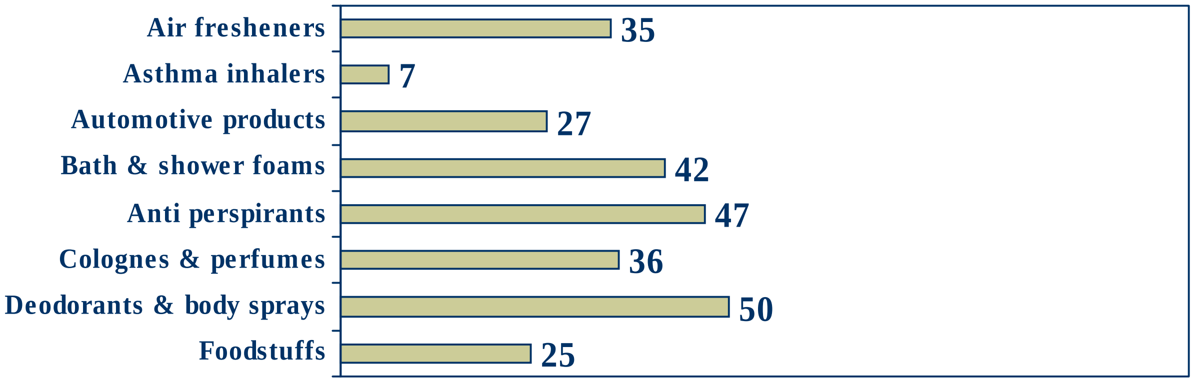
%

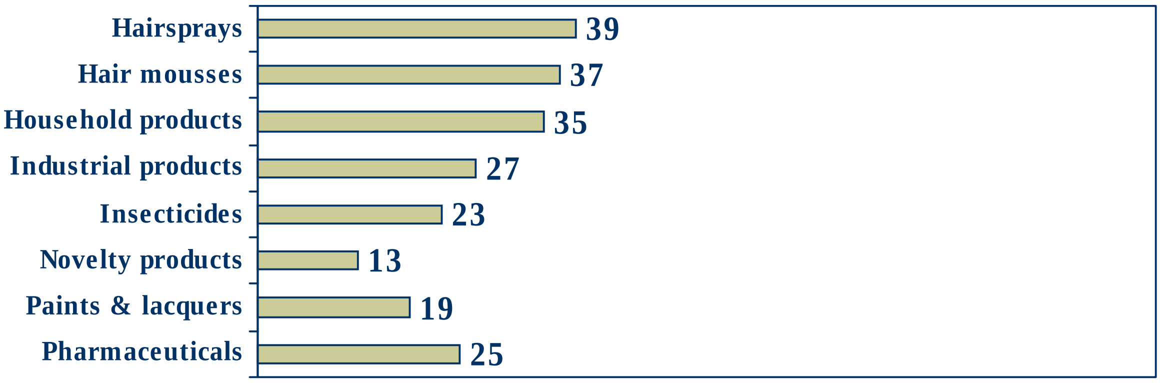
	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Air fresheners	35	30	75	24
Asthma inhalers	7	3	20	5
Automotive products	27	24	50	20
Bath & shower foams	42	45	85	24
Anti perspirants	47	55	85	29
Colognes & perfumes	36	45	75	16
Deodorants & body sprays	50	67	90	25
Foodstuffs	25	12	50	24
Hairsprays	39	52	80	16
Hair mousses	37	45	80	16
Household products	35	39	70	20
Industrial products	27	18	40	27
Insecticides	23	27	60	7
Novelty products	13	3	55	4
Paints & lacquers	19	9	50	15
Pharmaceuticals	25	21	55	16
Shampoos	37	33	65	29
Shaving products	37	42	85	16

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Shoe sprays	18	21	50	4
Skin creams	35	42	60	22
Sun tan lotions	24	18	65	13
Veterinary & pet care	17	12	50	7
Waxes & polishes	24	24	60	11

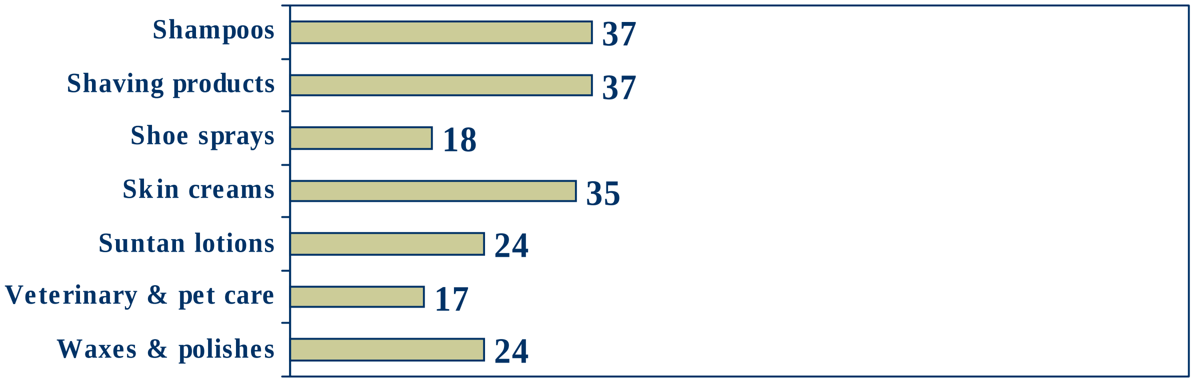
- The main areas of involvement are deodorants and body sprays, anti perspirants and bath & shower foams
- Marketers/Manufacturers and Retailers are involved in more areas than the Designers

% (n = 108)





% (n = 108)



Shampoos
37
Shaving products
37
Shoe sprays
18
Skin creams
35
Suntan lotions
24
Veterinary & pet care
17
Waxes & polishes
24

10. WHERE'S THE GROWTH POTENTIAL?

On a 10 point scale where 10 = maximum potential the mean answers are as follows:

Base : all respondents

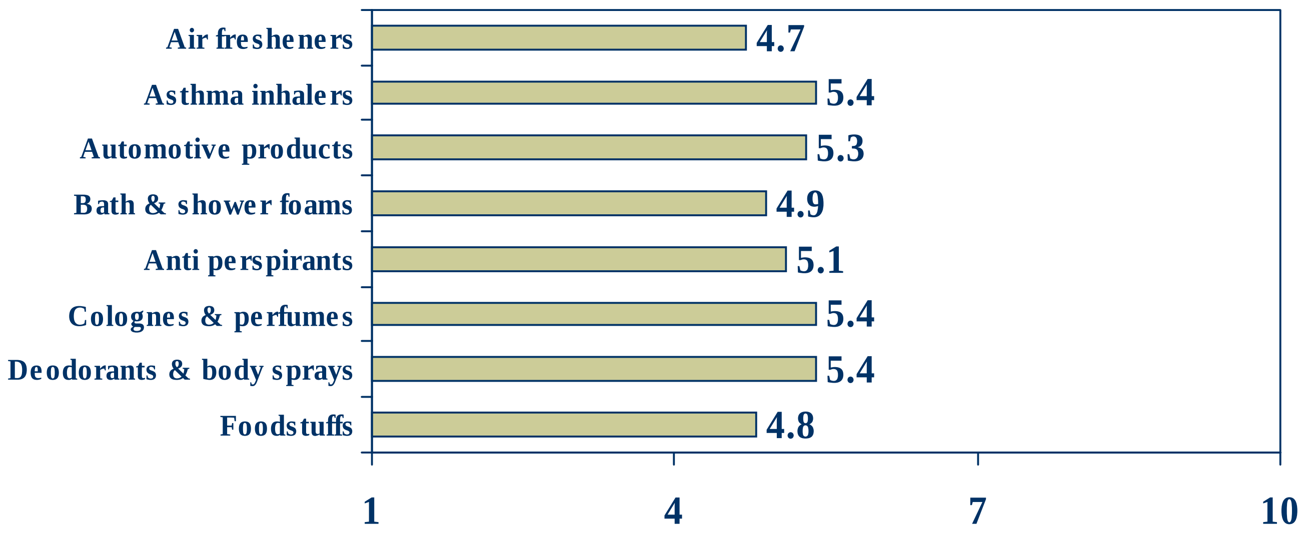
%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Air fresheners	4.7	4.1	4.2	5.3 *
Asthma inhalers	5.4	4.8	4.3	6.3 **
Automotive products	5.3	5.2	3.8 *	5.9 *
Bath & shower foams	4.9	4.8	4.7	5.0
Anti perspirants	5.1	4.7	4.6	5.6
Colognes & perfumes	5.4	4.7	4.4	6.3 **
Deodorants & body sprays	5.4	5.1	4.8	5.8
Foodstuffs	4.8	5.0	3.9	5.0
Hairsprays	5.2	4.8	4.0	5.9 *
Hair mousses	4.7	4.3	4.1	5.2
Household products	5.1	4.8	4.1	5.7 *
Industrial products	5.2	5.1	3.9 *	5.7
Insecticides	4.5	4.1	4.4	4.8
Novelty products	4.1	3.8	3.8	4.4
Paints & lacquers	4.9	4.7	3.8	5.4
Pharmaceuticals	6.0	5.7	4.9 *	6.5 *
Shampoos	3.4	2.9	2.6	4.1 *
Shaving products	4.7	4.4	3.9	5.3
Shoe sprays	5.0	4.5	4.4	5.5 *
Skin creams	4.9	4.5	3.8	5.5 *
Sun tan lotions	5.3	4.9	4.0	5.9 *

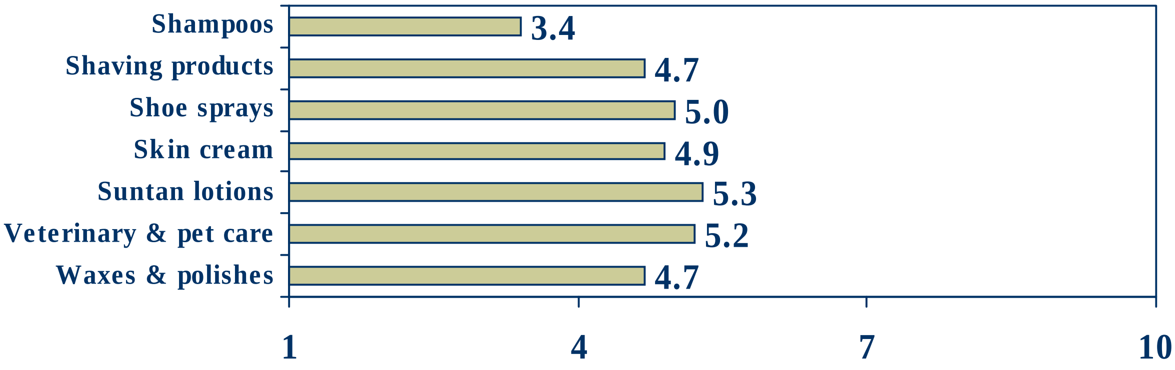
	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Veterinary & pet care	5.2	5.1	4.2	5.7
Waxes & polishes	4.7	4.8	3.7	5.1

- The greatest growth potential is seen to be in pharmaceuticals
- In general Marketers/Manufacturers and Retailers see less potential than Designers who are less knowledgeable about the practical aspects of aerosols

% (n = 108)



% (n = 108)



"We operate in all areas. Some potential exists in food. None in drinks. Home chemicals and laundry might have some growth. Also in personal care we are looking at alternative packaging sources. Aerosols are already established in DIY" Design Company

"In food? Very little. The UK is not ready. The artificial nature of the aerosol product puts the consumer off. Perhaps vinegars and dressings have opportunities?" Design Company

"Oils could use an aerosol if it delivers a tangible benefit. Or combining two products. For instance, in cocktails or a cappuccino. Some powders such as icing sugar or coffee or seasonings and stock cubes. Flavour additives" Design Company

Q10 Are there any other areas where you think aerosols have growth potential?

Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Cosmetics	3	3	0	4
Aromatherapy	2	3	0	2
Others	9	6	0	14
DK/NS	87	88	100	82

- This open-ended question produced very little in the way of new ideas except that two respondents suggested aromatherapy oils

Q11A Rating of the future of aerosols in their own businesses

Base : all respondents

Where 1 = no potential and 10 = most potential

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Most potential	10	6	18	0	2
	9	5	3	10	4
	8	20	24	35	13
	7	11	12	15	9
	6	7	9	5	7
	5	14	15	20	11
	4	6	3	5	9
	3	8	9	10	7
	2	6	3	0	9
No potential	1	16	3	0	29
Mean score		5.4	6.7 **	6.6	4.2 **

- When it comes to the practical issue of potential in their own businesses, it is the Marketers/Manufacturers and Retailers who are the optimists rather than the Designers

No potential = 1 : Major potential = 10 % (n = 108)

Q11B Reasons why potential is rated more positively

Base : all rating potential at 6 – 10

%

	All respondents (n = 54)	Marketers/ manufacturers (n = 22)	Retailers (n = 13)	Designers (n = 19)
Convenient to operate	39	18	54	53
Consumers like them	31	18	62	26
Do job effectively	28	18	46	26
Flexible applications	26	41	15	16
Good product	26	27	23	26
New product devt	15	18	0	21
Visual appeal	13	5	15	21
Consumers understand	11	9	23	5
Potential for greater use	11	9	0	21

- Note low sample bases
- The usual strengths of aerosols prevail as the basis for optimism, but with distinct differences in perception between Marketers/Manufacturers who look to the flexibility of aerosols, Retailers who look to convenience, consumer appeal and efficiency and the Designers who see convenience and consumer appeal as the key

Q11B Reasons why potential is rated more negatively

Base : all rating potential at 1 – 5

%

	All respondents (n = 54)	Marketers/ manufacturers (n = 11)	Retailers (n = 7)	Designers (n = 36)
New product devt needed	26	27	14	28
Looking at alternatives	20	18	14	22
Associated with CFCs/ozone layer	17	27	15	14

- Note low sample bases
- Those who see limited opportunities believe more NPD is needed in aerosols

Q11C Rating of the future of aerosols in packaging in general

Base : all respondents

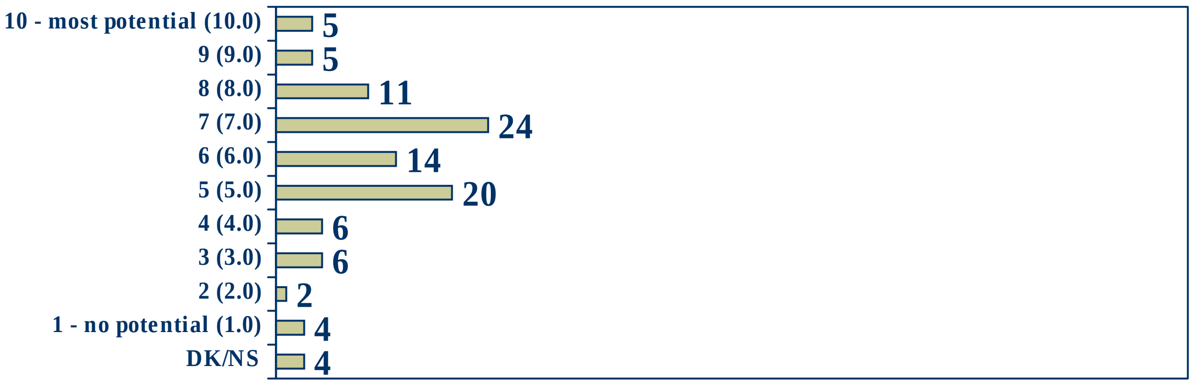
Where 1 = no potential and 10 = most potential

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Most potential	10	5	6	0	5
	9	5	6	5	4
	8	11	12	25	5
	7	24	33	25	18
	6	14	12	15	15
	5	20	18	20	22
	4	6	9	5	5
	3	6	3	0	9
	2	2	0	5	2
No potential	1	4	0	0	7
DK/NS		4	0	0	7
Mean score		6.0	6.5	6.4	5.5 *

- Again Marketers/Manufacturers and Retailers are more optimistic than Designers

% (n = 108)



Q11D Reasons why potential is rated more positively

Base : all rating potential at 6 – 10

%

	All respondents (n = 63)	Marketers/ manufacturers (n = 23)	Retailers (n = 14)	Designers (n = 26)
Flexible applications	49	52	43	50
Convenient to operate	38	39	36	38
New product devt	22	30	21	15
Visual appeal	8	13	7	4

- Note low sample bases
- Flexibility, convenience and NPD are the key reasons for optimism

Q11E <u>Reasons why potential is rated more negatively</u>

Base : all rating potential at 1 – 5

%

	All respondents (n = 41)	Marketers/ manufacturers (n = 10)	Retailers (n = 6)	Designers (n = 25)
Associated with CFCs/ozone layer	37	20	67	36
Looking at alternatives	32	40	0	36
All same shape	7	10	0	8
Not easily recyclable	7	10	17	4

- Note low sample bases
- Association with CFCs is a problem for all three segments, but particularly for Retailers
- Marketers/Manufacturers and Designers are more likely than Retailers to say that industry is looking around for alternative formats

11. ARE SPECIFIERS GETTING THE INFORMATION THEY NEED?

Q12 Are aerosol manufacturers making you aware of new developments in aerosols such as new shapes and actuators or bespoke designs?

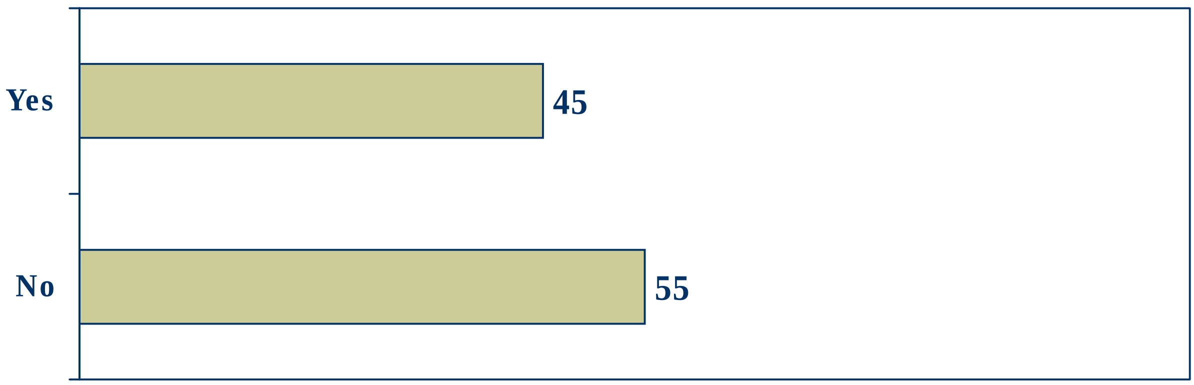
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Am being made aware	45	67	60	27
Not being made aware	55	33	40	73

- Retailers and Marketers/Manufacturers are more likely to be getting the information they require about aerosols than the Designers

% (n = 108)



Q13 Do aerosol manufacturers contact you on a regular basis?

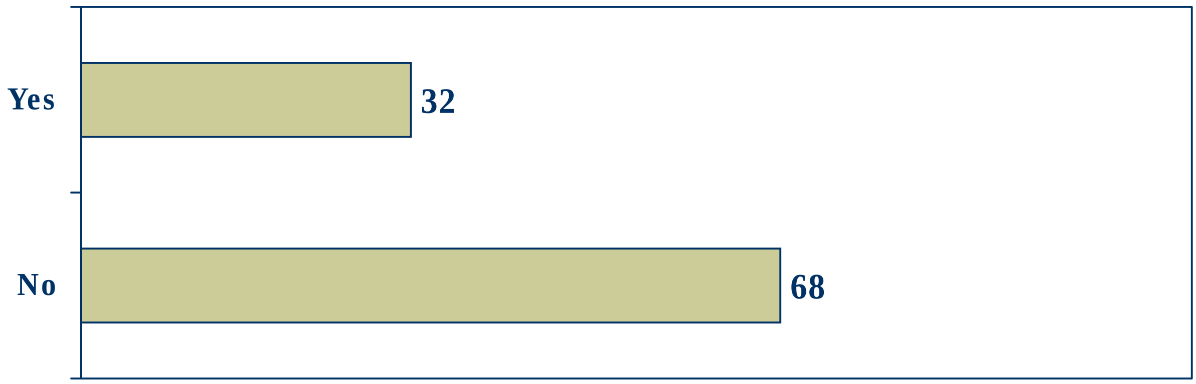
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Regularly contacted	32	58	60	7
Not regularly contacted	68	42	40	93

- Contact levels could be better, particularly for Designers, who are shown by the research to be relatively ignorant about aerosols

% (n = 108)



Q14 Which of these ideas would help you to specify aerosols more readily in future? (prompted list)

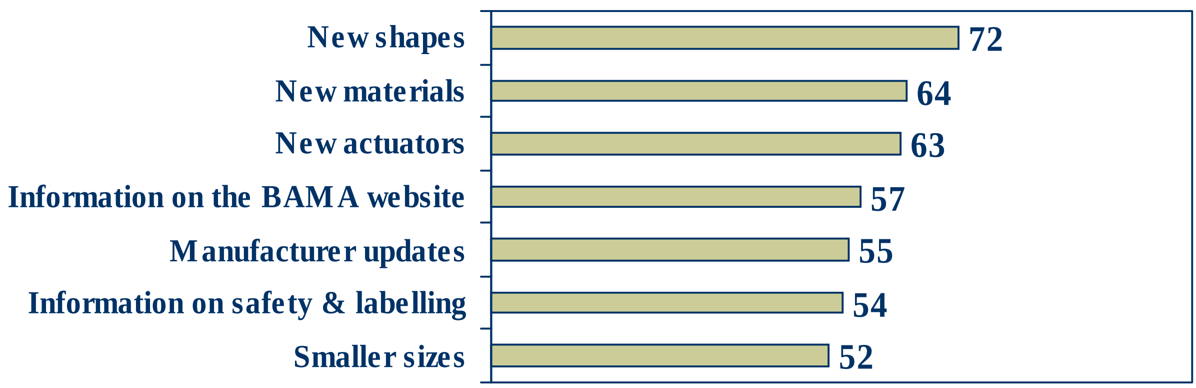
Base : all respondents

%

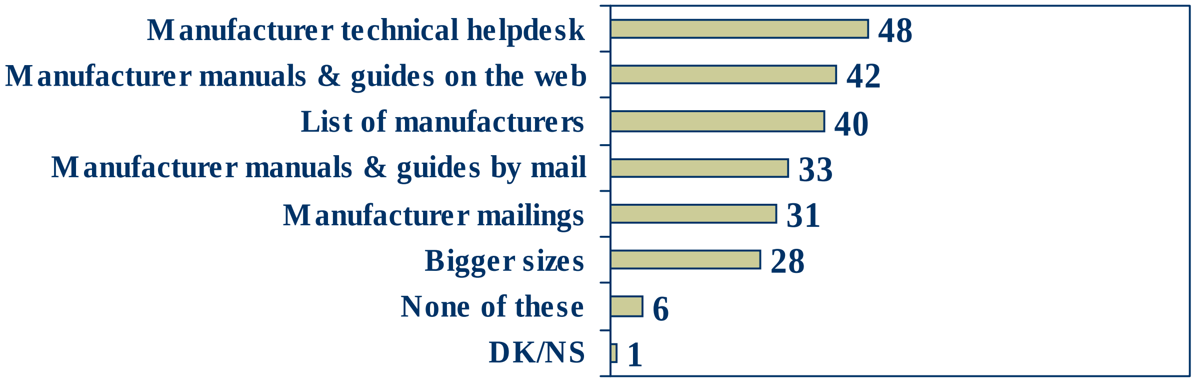
	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
New shapes	72	76	80	67
New materials	64	82	75	49
New actuators	63	85	80	44
Information on BAMA website	57	48	60	62
Regular manufacturer updates	55	61	85	40
Manufacturer information on safety & labelling	54	52	80	45
Smaller sizes	52	76	45	40

- There is a thirst for more information and innovation among all three segments, but particularly among Marketers/Manufacturers and Retailers

% (n = 108)



% (n = 108)



Q15 What else have aerosol manufacturers got to do to develop their share of the packaging market in the future? (spontaneous ideas)

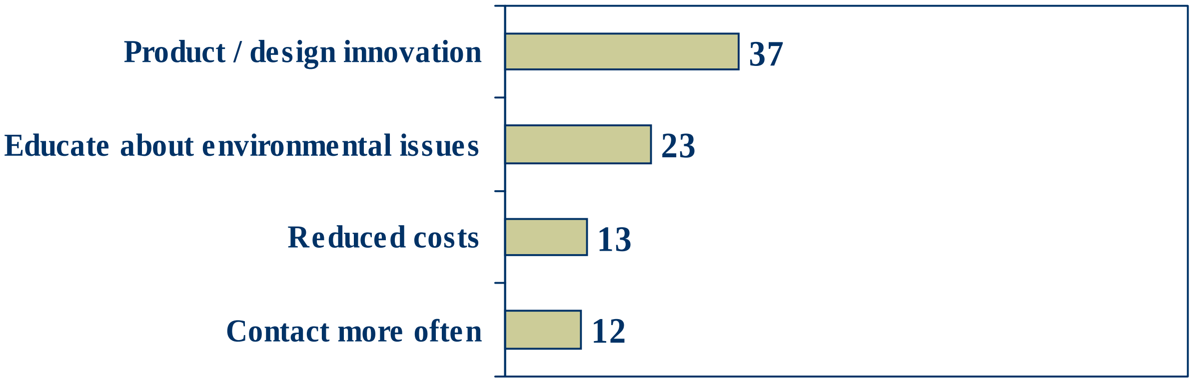
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Product/design innovation	37	33	50	35
Education on environmental issues	23	27	20	22
Reduce costs	13	18	20	7
Contact specifiers more often	12	15	0	15
Stronger product marketing	11	21	0	9
Target design agencies	9	9	0	13

- Again there is a thirst for information, particularly related to NPD and environmental information

% (n = 108)



NPD:

"Flexibility in design, shaping of cans, finding better ways to design activators and overcaps. Not just a big cylindrical can like everyone else's" Design Company

"The aerosol needs more design elements and more customisation. They are too standardised. Consumers see it as a standard product form. Nothing eye catching" Manufacture and Market Packaged Goods

"The industry should use technology in a much more innovative way. A whole range of products are in aerosols, but the aerosol has not moved forward . . . . we need to be aware of the innovations that are out there. Aerosols remain can-shaped" Design Company

"By responding to the ever-increasing time it takes to get to market. The industry doesn't respond quickly enough" Manufacture and Market Packaged Goods

"Innovation. The possibility of tactile finishes and shaped cans. Not just cylindrical" Manufacture and Market Packaged Goods

"We are always looking for new methods of dispense. There's the added element of shaped cans. The big players are moving into customisation" Manufacture and Market Packaged Goods

Addressing CFC/environmental perceptions:

"Why can't we get it through to the general public that CFCs have not been used for 12 years? Labelling makes consumers think that CFCs can be used, which they are not nowadays" Manufacture and Market Packaged Goods

"People are being misled. When you put that the 'container has no CFCs' you are inferring that others do. It is negative advertising" Market and Sub-contract Manufacture

"They should only label those containers that contain CFCs. Label the few not the many" Manufacture and Market Packaged Goods

12. THE ROLE OF DESIGN AGENCIES

Q16A How effective are design agencies at offering advice and expertise to clients?

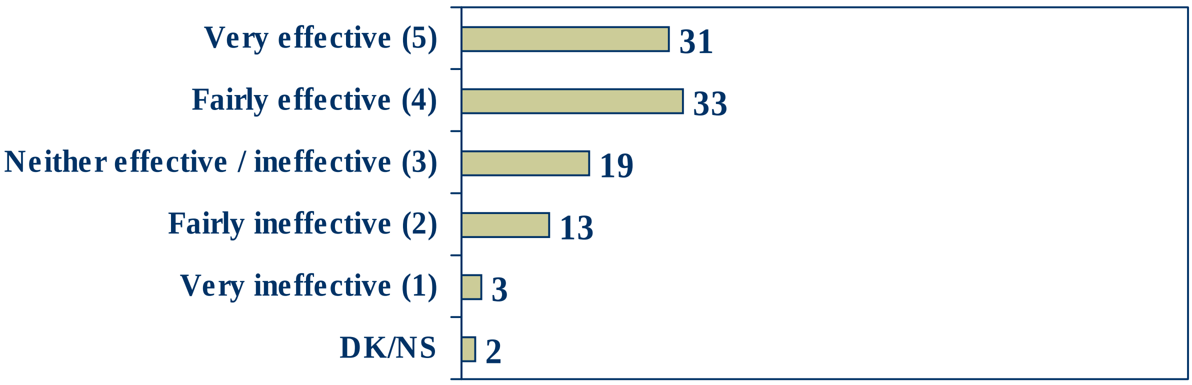
Base : all respondents

%

Statement		All respondents (n = 108)	Marketers/ manufacturers (n = 33)	Retailers (n = 20)	Designers (n = 55)
Very effective	5	31	24	5	44
	4	33	27	30	38
	3	19	21	35	11
	2	13	15	25	7
No potential	1	3	9	0	0
DK/NS		2	1	5	0
Mean score		3.8	3.4 *	3.2 **	4.2 **

- Designers are more satisfied with themselves than are their clients who are more neutral about their ability to advise

% (n = 108)



Q16B Why are design agencies effective at offering packaging advice?

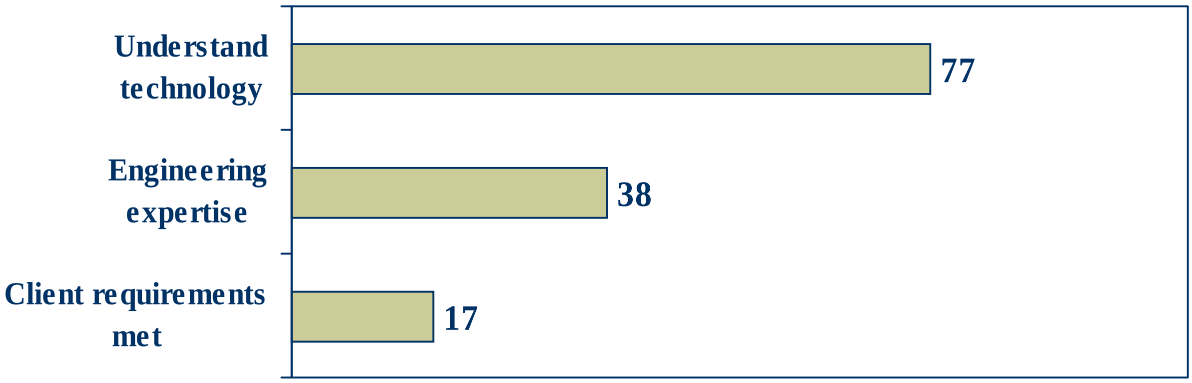
Base : all who think design agencies are effective

%

	All respondents (n = 69)	Marketers/ manufacturers (n = 17)	Retailers (n = 7)	Designers (n = 45)
Understand technology	77	65	86	80
Engineering/technical advice	38	41	14	40
Meet client requirements	17	18	29	16

- Note low sample bases
- Where Designers are good, they probably excel in the more technical areas

% (n = 69)



Q16C Why are design agencies ineffective at offering packaging advice?

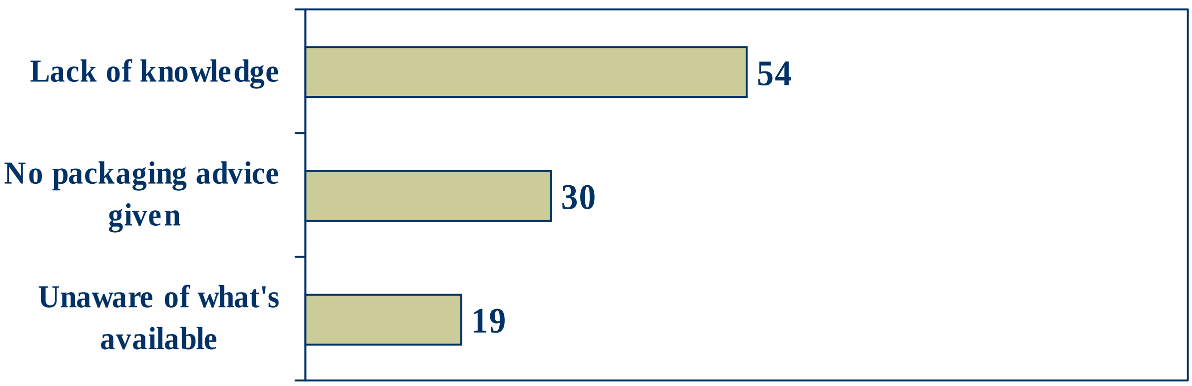
Base : all who think design agencies are ineffective

%

	All respondents (n = 37)	Marketers/ manufacturers (n = 15)	Retailers (n = 12)	Designers (n = 10)
Lack of knowledge	54	53	67	40
No packaging advice given	30	33	42	10
Unaware of what is available	19	27	17	10
Don't generally use	11	13	17	0
Have to speak to aerosol manufacturers	11	20	0	10

- Note low sample bases
- Where Designers are bad they simply lack knowledge of packaging and are unable to advise

% (n = 37)



13. TRADE PRESS

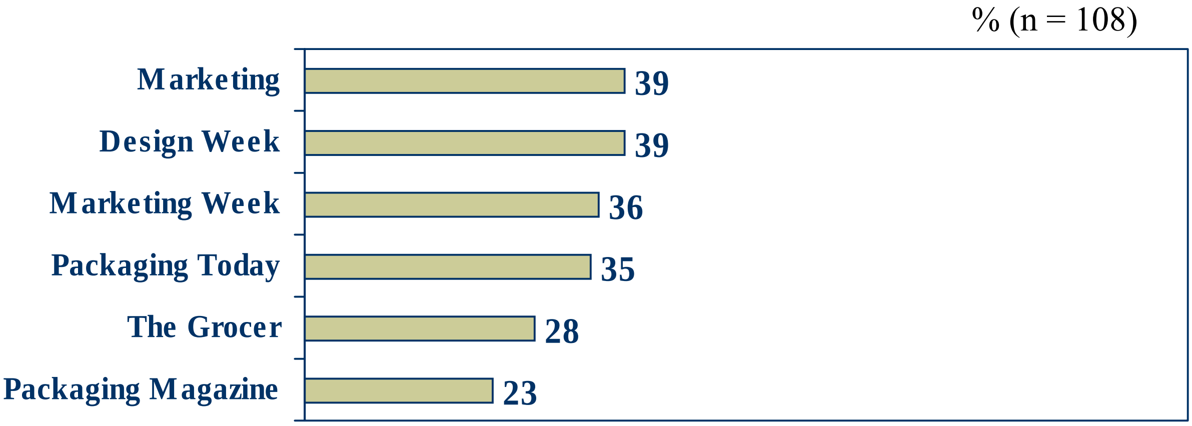
Q17A Which trade magazines are seen once a month or more?

Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 35)	Retailers (n = 20)	Designers (n = 55)
Marketing	39	33	45	40
Design Week	39	9	15	65
Marketing Week	36	33	45	35
Packaging Today	35	55	35	24
The Grocer	28	15	60	24
Packaging Magazine	23	42	35	7
Campaign	19	9	25	22
Retail Packaging	15	21	45	0
Soap, Perfumes, Cosmetics	15	36	15	2

- Note that these are small bases and this should not be seen as a readership survey, but rather as a broad guideline to readership habits. Magazines appear with different frequencies and target different markets
- While Marketing and Design Week are most widely seen overall, the picture varies by segment
- Marketers/Manufacturers sampled tend to see Packaging Today and Packaging Magazine and more
- Retailers sampled see The Grocer, Marketing, Marketing Week and more
- Designers sampled see Design Week, Marketing, Marketing Week and more



Q17B Which trade magazine is the most useful source of information on new product development?

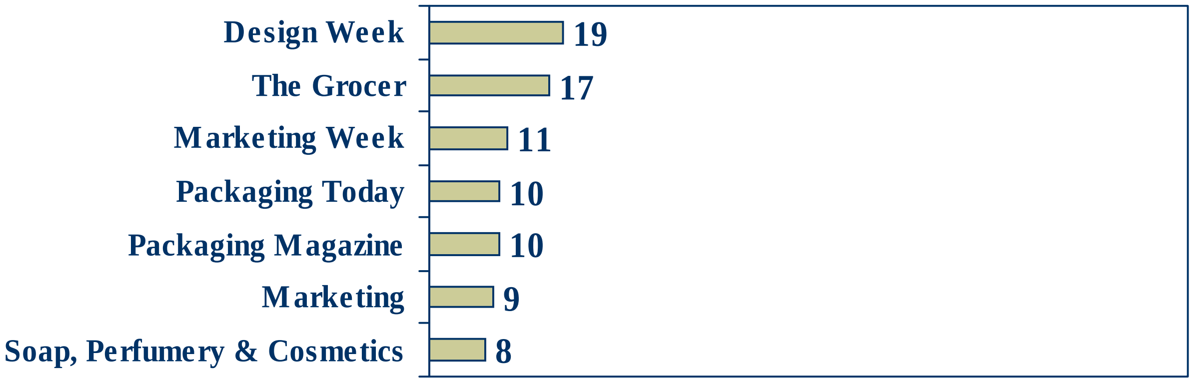
Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 35)	Retailers (n = 20)	Designers (n = 55)
Design Week	19	0	5	35
The Grocer	17	6	45	13
Packaging Today	13	15	20	9
Marketing Week	11	9	15	11
Packaging Magazine	10	21	5	5
Marketing	9	3	5	15

- For NPD Design Week and The Grocer appear to be best
- For Marketers Packaging Magazine and Packaging Today
- For Retailers The Grocer, Packaging Today and Marketing Week
- For Designers Design Week, The Grocer and Marketing Week

% (n = 108)



14. AWARENESS OF THE BAMA

Q18 Had you heard of BAMA before you received their recent letter about this survey?

Base : all respondents

%

	All respondents (n = 108)	Marketers/ manufacturers (n = 35)	Retailers (n = 20)	Designers (n = 55)
Had heard of BAMA	59	91	90	29
Had not heard of BAMA	41	9	10	71

- While Marketers and Retailers have heard of BAMA, most Designers have not