THE CONVERGENCE OF HEALTH & ENVIRONMENT

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THE PARADOX:

"We need to save ourselves before we save the planet – but if we don´t save the planet we will die"

OVERVIEW

Signs of a Changing World

“ We need to act. Like last summer, parts of India became almost uninhabitable. As temperature is increasing, the planet is getting uninhabitable. ”

MALE, 33, INDIA

“ In my own town, the river is devastated, and we are suffering a lot from the lack of water. ”

FEMALE, 37, BRAZIL

“ Back then, we knew the rainy season was September to December, but now it’s unpredictable. We also have to use AC at home because it’s so hot now. ”

FEMALE, 38, INDONESIA

“ We need to start doing things. We can’t consume products like we do today, we just can’t. Our health and well-being will be affected. If there is pollution, there are implications for us when breathing. We must be aware of that! We need to be aware of what’s sustainable. ”

FEMALE, 41, UK

“ Some of the things that I thought were recyclable are no longer being picked up. Like the bag the newspaper comes in. I just feel awful throwing a plastic bag in the garbage, but I don’t know what else to do. ”

FEMALE, 63, US

“ Two of my children have health issues, some rare allergies and autism. I think the way our food is manufactured now, and the way animals are fed and raised, creates a great toxic burden and decreases nutrition. ”

FEMALE, 33, US

“ I became a vegan four years ago. It is well known that food habits have a positive impact on environment, and recently it has became even more obvious to many that plant-based food demands less resources. ”

MALE, 33, UK

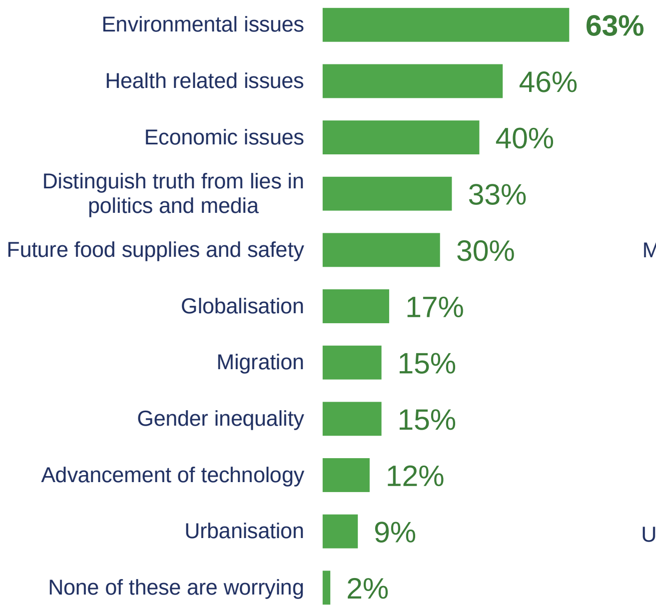
HEALTH AND ENVIRONMENT CONCERNS AMONG CONSUMERS OF TODAY

What are their key worries?

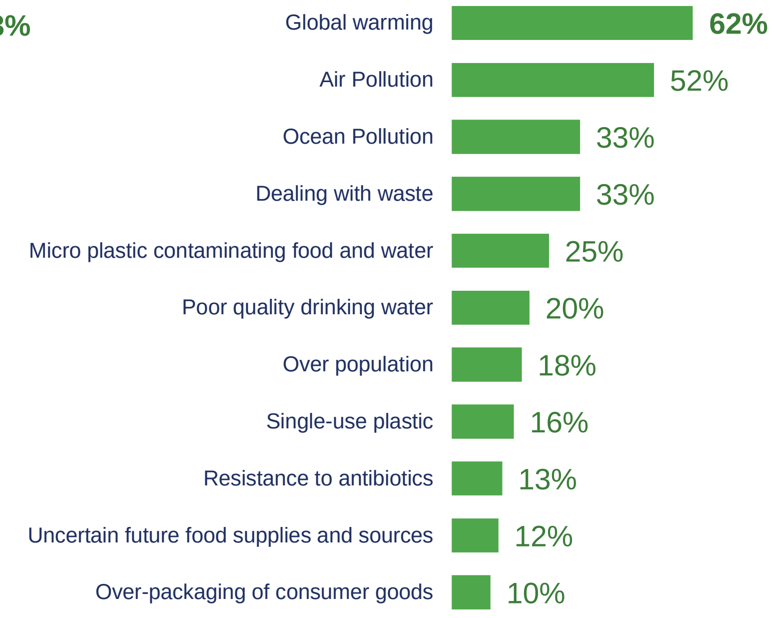
Most worrying concerns for consumers

86% believe that the focus on environmental issues will grow

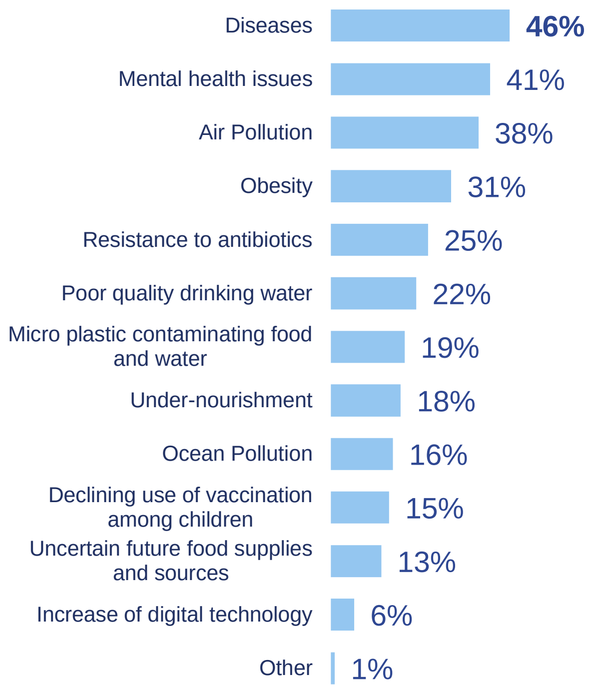
Global Worries



Most worrying Environmental



Most worrying Health



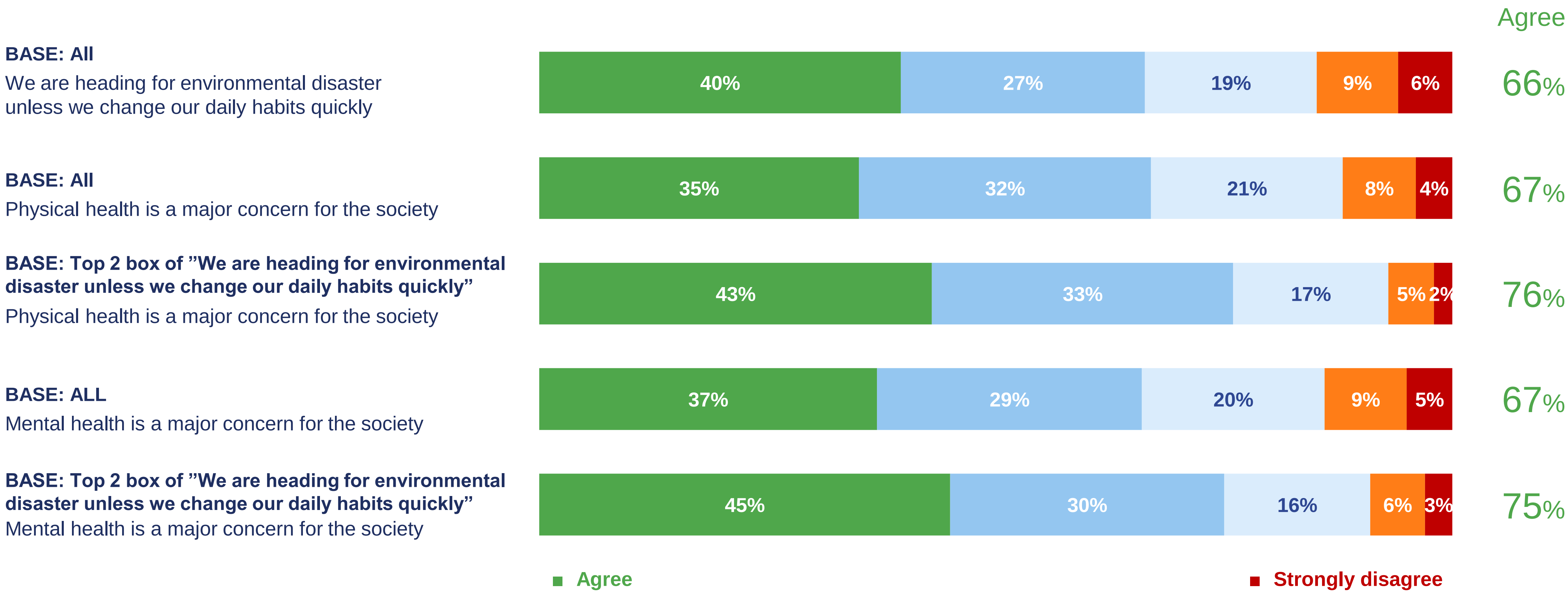
Environmental issues are by far the top global concern among consumers

86% believe that the focus on environmental issues will continue to grow

47% believe that products they buy for their health will also impact the environment

Connection between concern for environment and health

Those who predict environmental disaster are also more concerned about health



Individual Responsibility is Rising

Consumers are changing behaviours and plan to do more in next 12 months

TODAY

CURRENT BEHAVIOUR AND DRIVERS COMPARED WITH TWO YEARS AGO

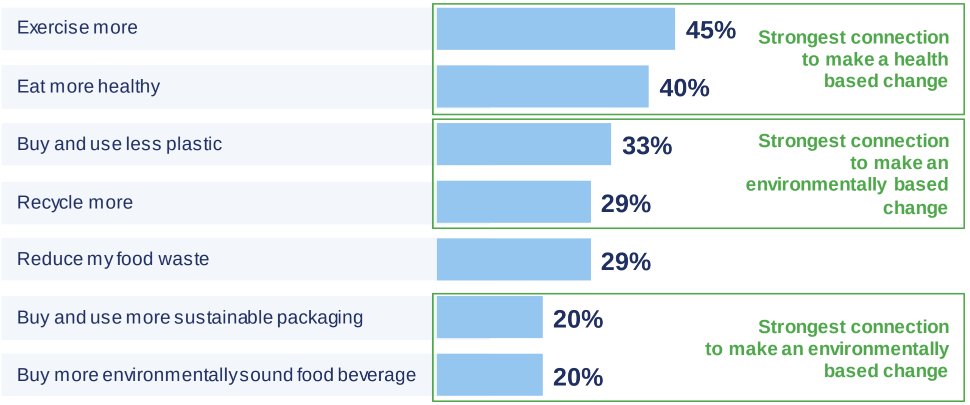
DRIVERS TO PURCHASE ENVIRONMENTALLY SOUND PRODUCTS (% VALUES)

TOMORROW

AMBITIONS AND DRIVERS FOR THE NEXT 12 MONTHS

A WIDESPREAD AMBITION TO EXERCISE MORE AND EAT HEALTHIER

Key reasons are to improve physical health and feel better about oneself and future generations



Consumers hold themselves responsible for the environment and their own health – ahead of government and brands

Consumers are already changing behaviours and plan to become increasingly environmentally sound and healthier over the next 12 months

1 in 5 plan to buy more sustainable packaging and more environmentally sound food and beverage products

COMMUNITY MOVEMENTS ARE ON THE RISE

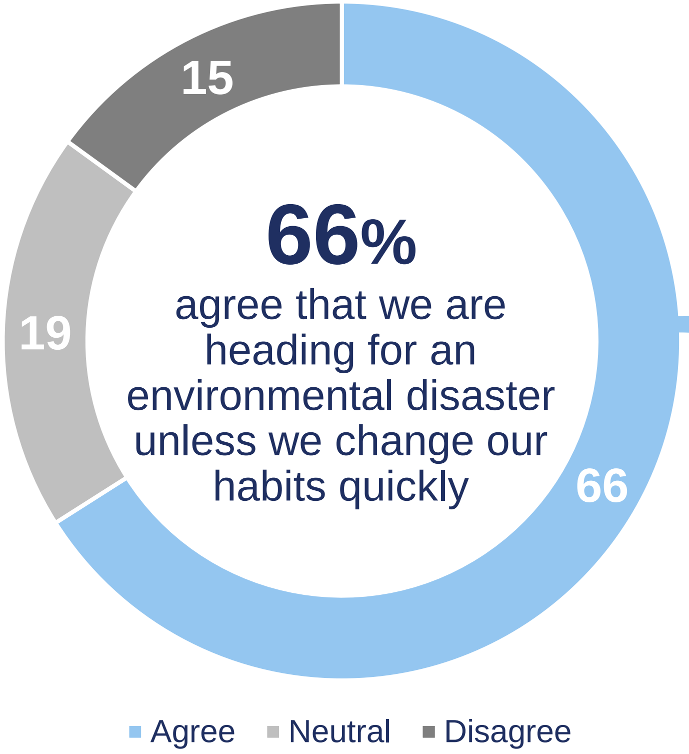
FOR RECYCLING AND EXCHANGE OF CLOTHES

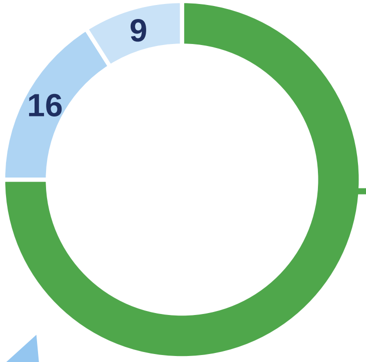
“I belong to an organisation in my town, that is trying ways to reduce plastic use – single used plastic, and plastic in general in our town…Tonight we are showing a film about rubbish. We try to make people aware about not using single used plastic and about recycling. I actively do that. Within another group I am part of we use litter pickers in my town and around the town. The group is supported by the local councils.”

FEMALE, 63, UK

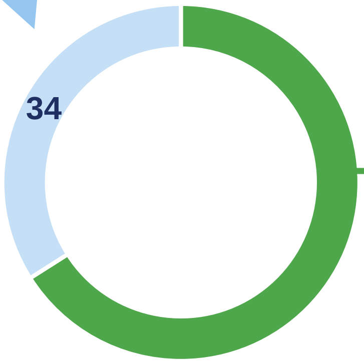
A sense of urgency for the environment and our health

Concerned consumers see the environment as strongly impacting their personal health

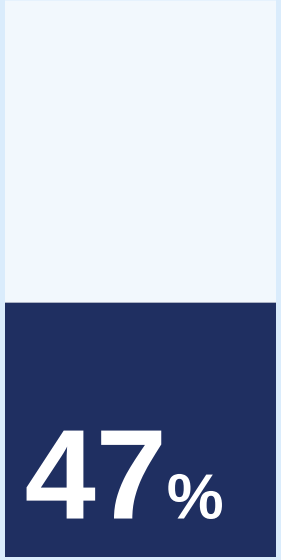




75%
think mental health is a major concern for the society
(67% total pop.)



66 %
think their health and wellbeing are strongly affected by environmental issues (54% total pop.)



Think that the **purchase choices** they make for their personal health have an **impact on the environment***

Think that **environmental issues** have an **impact on their health***

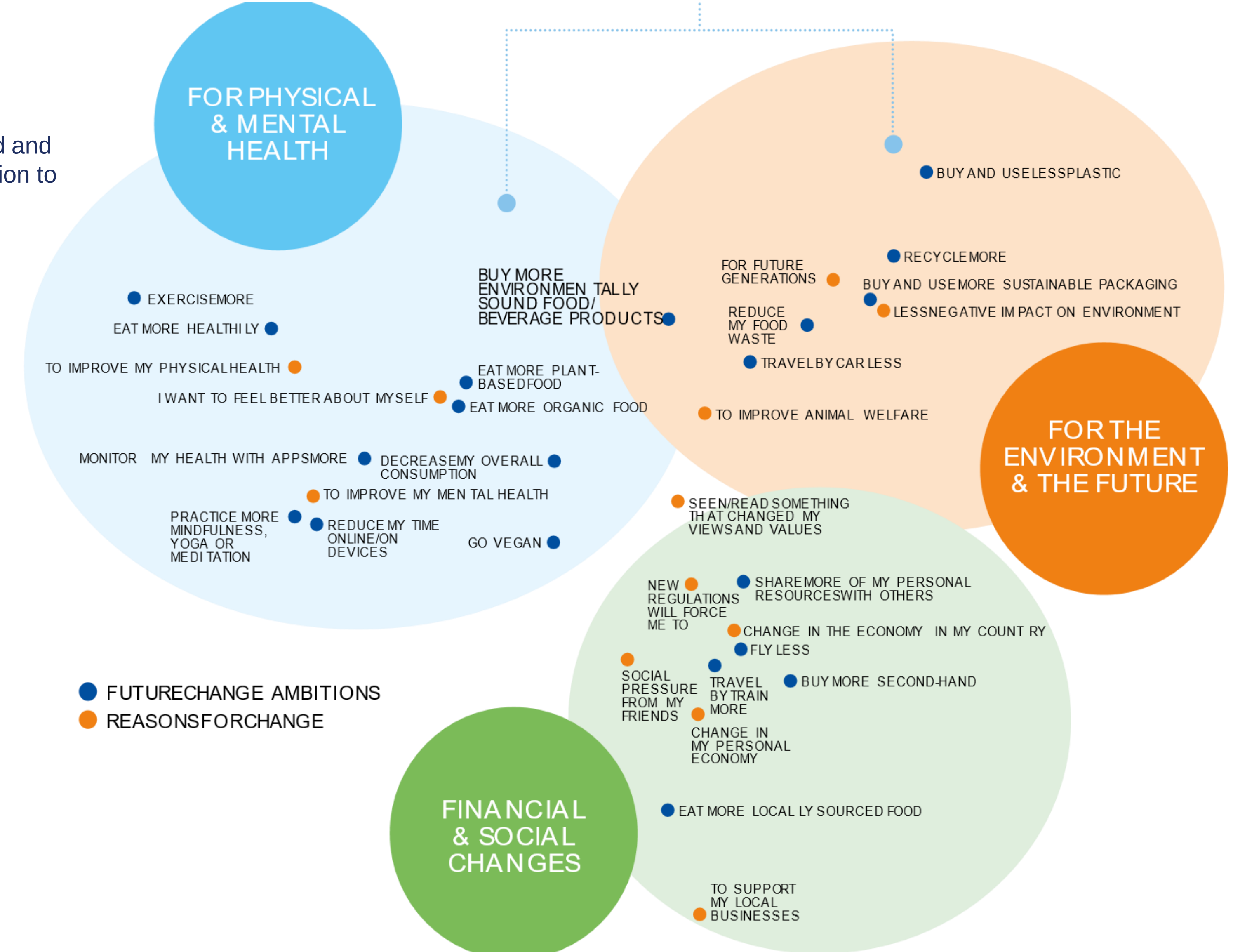
WHAT ARE CONSUMERS LOOKING FOR WHEN CHOOSING FOOD AND DRINK PRODUCTS?

Choosing environmentally sound foods and beverages

A key change driver for consumers in the next 12 months

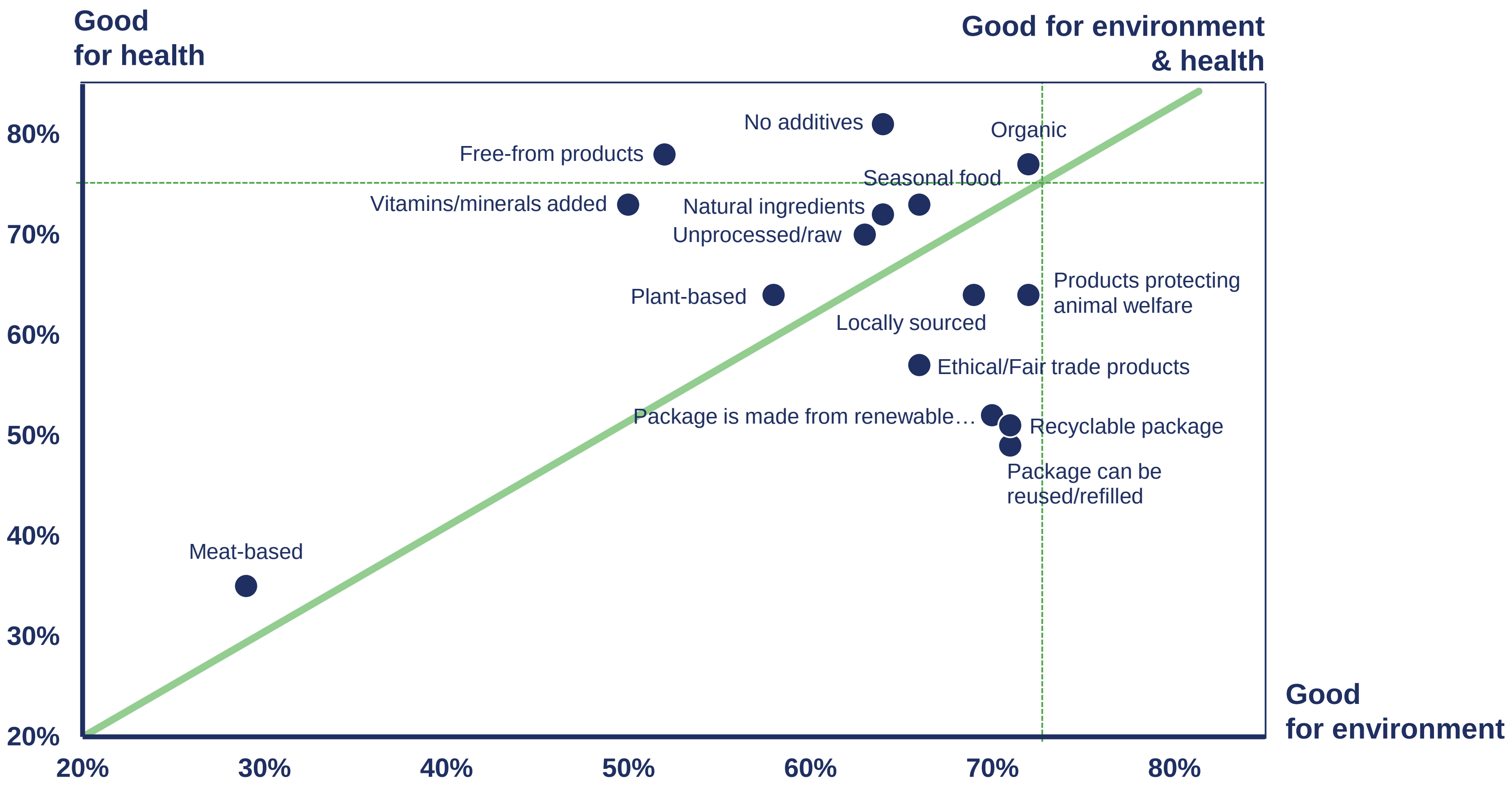
THREE CLUSTERS OF POTENTIAL CHANGE

Buying more environmentally sound food and beverage products has a strong connection to both health and environmental changes



Organic food is rated highest as best for me and planet

Package related attributes mainly good for the environment



The charts shows the correlation between descriptions of food which are good for the Environment and Good for Health. The closer to the diagonal line, the higher correlation.

Packaging matters

Recyclability and biodegradability are equally desirable

8 in 10

HAPPY TO PAY MORE FOR FOOD AND BEVERAGE PACKAGING THAT IS ENVIRONMENTALLY SOUND

4 in 10

WILLING TO PAY MORE FOR HEALTHIER FOOD

2 in 4

SAY THAT SUSTAINABLE PACKAGING MAKES THEM MORE LIKELY TO CONSIDER A BRAND

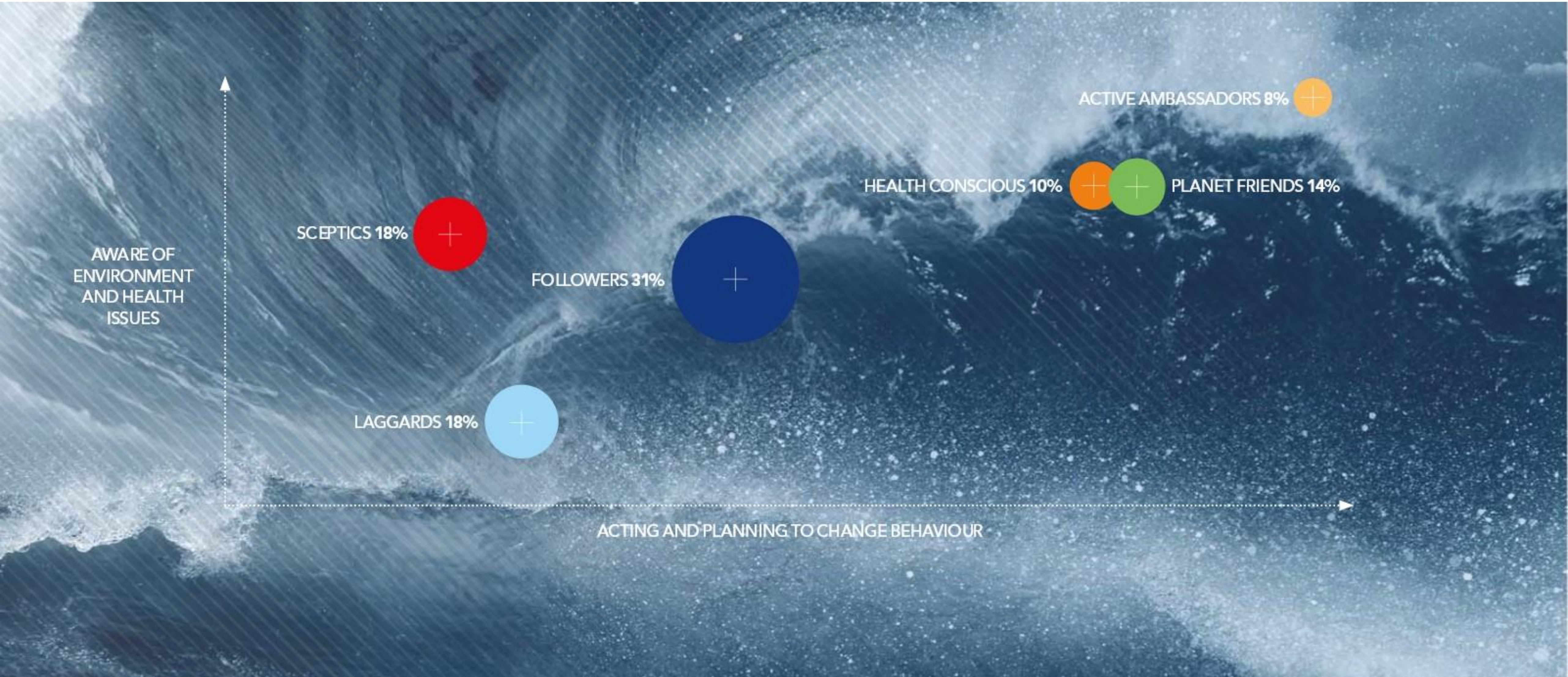
RECYCLING IS NOW CONSIDERED THE #1 TRAIT OF AN ENVIRONMENTALLY SOUND PERSON

RECYCLABILITY IS THE #1 ASSOCIATION WITH ENVIRONMENTALLY SOUND PRODUCTS – BUT BIODEGRADABILITY IS NOW EQUALLY APPEALING

CONSUMER SEGMENTS WITHIN HEALTH AND ENVIRONMENT CONVERGENCE

Six Consumer segments identified

Based on degree of awareness, attitudes, engagement/behaviour



ACTIVE AMBASSADORS

SEGMENT SIZE 8%

CHANGE INDEX

47% plan to change at least two things to live in a more environmentally sound way

68% plan to change their exercise or food habits or both to live more healthily

High engagement in all aspects of health and environment.

Very willing to take action, challenge boundaries and influence others.

Top score on impact of environment on health and vice versa.

GENDER

Male 46%	Female 54%

AGE

16-24	15%
25-34	27%
35-44	27%
45-54	15%
55-65	10%
66+	5%

EDUCATION

Low	1%
Medium low	20%
Medium high	52%
High	26%

Children under 18 in home	52%

More urban

OVER-INDEXING COUNTRIES

Indonesia	India	China	Brazil
11%	11%	14%	12%
135	137	172	148

PLANET FRIENDS

SEGMENT SIZE 14%

CHANGE INDEX

42% plan to change at least two things to live in a more environmentally sound way

68% plan to change their exercise or food habits or both to live more healthily

Engaged and willing to take action about the environment.

Also high engagement on most aspects of health, particularly for peace of mind.

Less inclined to challenge boundaries, try new things and act as influencers.

GENDER

Male	Female
45%	55%

AGE

16-24	15%
25-34	22%
35-44	24%
45-54	16%
55-65	12%
66+	10%

EDUCATION

Low	2%
Medium low	24%
Medium high	56%
High	19%

Children under 18 in home	37%

More small urban areas

OVER-INDEXING COUNTRIES

Spain	Brazil	UK
28%	20%	18%
193	139	125

HEALTH CONSCIOUS

SEGMENT SIZE 14%

CHANGE INDEX

37% plan to change at least two things to live in a more environmentally sound way

70% plan to change their exercise or food habits or both to live more healthily

Aware and engaged about environment, but even more so about health.

Prepared to try new things, and to pay more and sacrifice convenience for healthy products.

Particularly influenced by social media and forums. Fashionable, but not trend-setters.

GENDER

Male	Female
49%	51%

AGE

16-24	20%
25-34	25%
35-44	25%
45-54	14%
55-65	9%
66+	7%

EDUCATION

Low	1%
Medium low	20%
Medium high	60%
High	19%

Children under 18 in home	46%

More urban

OVER INDEXING COUNTRIES

China
24%
251

FOLLOWERS

SEGMENT SIZE 31%

CHANGE INDEX

- 29% plan to change at least two things to live in a more environmentally sound way
- 67% plan to change their exercise or food habits or both to live more healthily

Engages enough with health and environmental issues to feel guilty about both, but not inclined to change behaviour or try new things.

Needs to know more and be persuaded and energised to act.

Sizeable mainstream cohort with interesting potential.

GENDER

Male	Female
51%	49%

AGE

16-24	18%
25-34	24%
35-44	21%
45-54	18%
55-65	12%
66+	8%

EDUCATION

Low	2%
Medium low	27%
Medium high	54%
High	17%

Children under 18 in home	37%

More rural

OVER INDEXING COUNTRIES

South Korea	Indonesia
52%	36%
167	114

SCEPTICS

SEGMENT SIZE 18%

CHANGE INDEX

19% plan to change at least two things to live in a more environmentally sound way

55% plan to change their exercise or food habits or both to live more healthily

GENDER

Male	Female
55%	45%

AGE

16-24	18%
25-34	23%
35-44	20%
45-54	17%
55-65	11%
66+	11%

EDUCATION

Low	2%
Medium low	30%
Medium high	49%
High	18%

Children under 18 in home	42%

More small urban areas and rural

Thinks there is too much fuss about the environment.

Aware of issues but inclined to dismiss them as “fake news”.

“Traditional” views on food and health. Suspicious of technology.

OVER INDEXING COUNTRIES

US	UK	Saudi Arabia
30%	25%	20%
164	137	110

LAGGARDS

SEGMENT SIZE 18%

CHANGE INDEX

16% plan to change at least two things to live in a more environmentally sound way

42% plan to change their exercise or food habits or both to live more healthily

GENDER

Male	Female
52%	48%

AGE

16-24	20%
25-34	31%
35-44	25%
45-54	15%
55-65	5%
66+	3%

EDUCATION

Low	15%
Medium low	27%
Medium high	27%
High	15%

Children under 18 in home	49%

More rural

Lack of knowledge of/interest in all aspects of health and environment. Sceptical about technology and change.

Claims willingness to take action and challenge boundaries, but scores low on planned changes for the future and high on “live for today”.

Actively tries to influence others.

OVER INDEXING COUNTRIES

Saudi Arabia	India	Brazil
46%	22%	20%
252	122	110

How to Connect with the Segments?

Strategies on how to approach each one

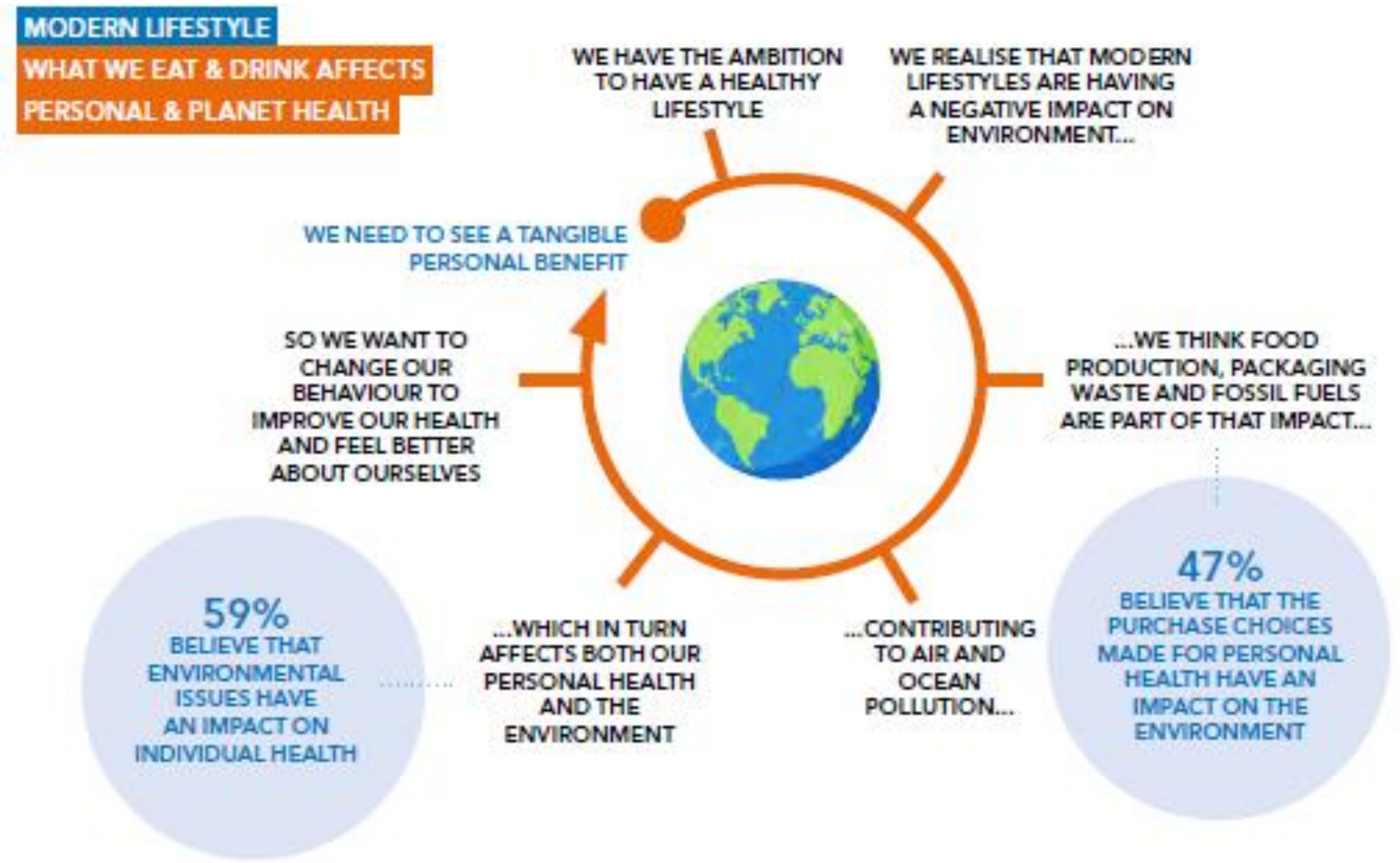




	ACTIVE AMBASSADORS	PLANET FRIENDS	HEALTH CONSCIOUS	FOLLOWERS	SCEPTICS	LAGGARDS
CHANGE INDEX	68%	63%	70%	67%	55%	42%
	47%	42%	37%	29%	19%	16%
SPECIFIC MOTIVATIONS	Animal welfare Future generations	Less negative impact on environment Future generations	Less negative impact on environment Seen/read something that changed my views and values	Better physical health I want to feel better about myself	Social pressure from family and friends Regulations	Social pressure from family and friends Regulations
HOW TO APPROACH	Use them as influencers and as part of expert groups. Bring them more expertise, news and facts	They want to hear and understand the facts. Channel viewpoints and research from scientists	Inspire them to find new ways to improve their health. Stimulate interaction with their peers via social media	Give them the nudge and support they need. Make change as easy as possible. Provide encouragement and helpful instruction	Reach out on a local, grassroots level. They need to be convinced by those they recognise and trust: “people like us”	Give them more exposure to the issues and knowledge in general

Modern lifestyle, especially what we eat and drink, is believed to affect the environment

…which in turn gives negative effect on health



SUMMARY & CONCLUSIONS

01

The #1 change ambition among consumers – for both personal health and the environment – is greater consumption of more environmentally sound food and drink products.

02

Health and environment are now seen as overlapping – nearly 3 in 5 consumers already feel that their health and well-being is strongly affected by environmental problems.

03

Consumers hold themselves responsible for their own health and the health of the planet – they increasingly believe that modern lifestyles, particularly what we eat and drink, negatively impacts health and the environment.

04

Anti-plastic sentiment is strong – nearly 2 in 3 consumers believe that an environmentally sound person avoids plastic, and 1 in 3 say they plan to buy and use less plastic within the next 12 months.

05

The most successful brands going forward will be those making positive contributions to society – beyond providing good services and products.

06

Food and beverage the first industry to experience the convergence of health and environment – gaining an opportunity for brands to connect with consumers by addressing both at the same time.

Find out more at: Tetrapak.com/about/tetra-pak-index