Plastic Food Packaging:

Before and After COVID

Consumer Attitudes From 2019 to 2020

Preliminary Results

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Survey Performance

Dalhousie University

Aim of the Survey: To understand how COVID-19 has impacted Canadian consumers' attitudes towards single use plastic food packaging.

Methodology: A representative survey of Canadian consumers was carried out from July 10 to July 14, 2020, in partnership with Angus Reid. 977 valid responses were collected. In order to observe changes over time, we compared these recent results with baseline data collected by this lab through an earlier survey of 1014 Canadians conducted on May 13 to 18, 2019.

Margin of Error: Each sample carries a margin of error of +/-3.2 percentage points, 19 times out of 20. Discrepancies in or between totals are due to rounding.

KEY FINDINGS

1. Changes in Behaviour:

The percentage of respondents actively shopping for non-plastic packaged goods is essentially unchanged, from **58%** in 2019 to **60%** in 2020.

While the vast majority of Canadians continue to recognize the environmental impacts of plastics, 2020 results see small but measurable decline in concern (from **91%** to **87%**), and in consumers' motivation to avoid plastics (from **89%** to **85%**) - but with steeper declines among men.

29% of respondents feel they are buying more plastic packaged goods during COVID. Women are more likely than men to buy more plastics (**34%** vs **25%**). Young people are particularly buying more – with **47%** of 18-25 year olds and **34%** of 26-39 year olds reporting more plastic packaging consumption.

55% of respondents are more concerned about food safety since COVID – particularly female, urban, and respondents in BC and the Atlantic

40% of respondents consider new safety concerns during COVID to be either "very important' or "extremely important" to their decisions about buying plastic packaged goods. New safety concerns were most important for respondents who were female, older, lower income, and had fewer children.

50% of respondents are more price conscious since COVID – particularly those with lower incomes and those receiving CERB.

KEY FINDINGS

2. Changes in Attitudes towards Policy Measures:

In 2019 there was strong support for both stronger regulations on plasticss (**90%** in agreement) and also for a single use plastics ban (**70%** in agreement) Support was equal between men and women.

In 2020, support for stronger regulations has declined by **11** percentage points to **79%**, and support for a ban is down **12** points to **58%**. Male and female attitudes have diverged, with women continuing to support bans and regulations while support among men is down sharply.

52% of respondents agree that any new regulations should wait until after COVID is resolved.

While support for bans and regulations is down, there is a sharp increase in consumers' willingess to pay more for bio-degradable packaging:

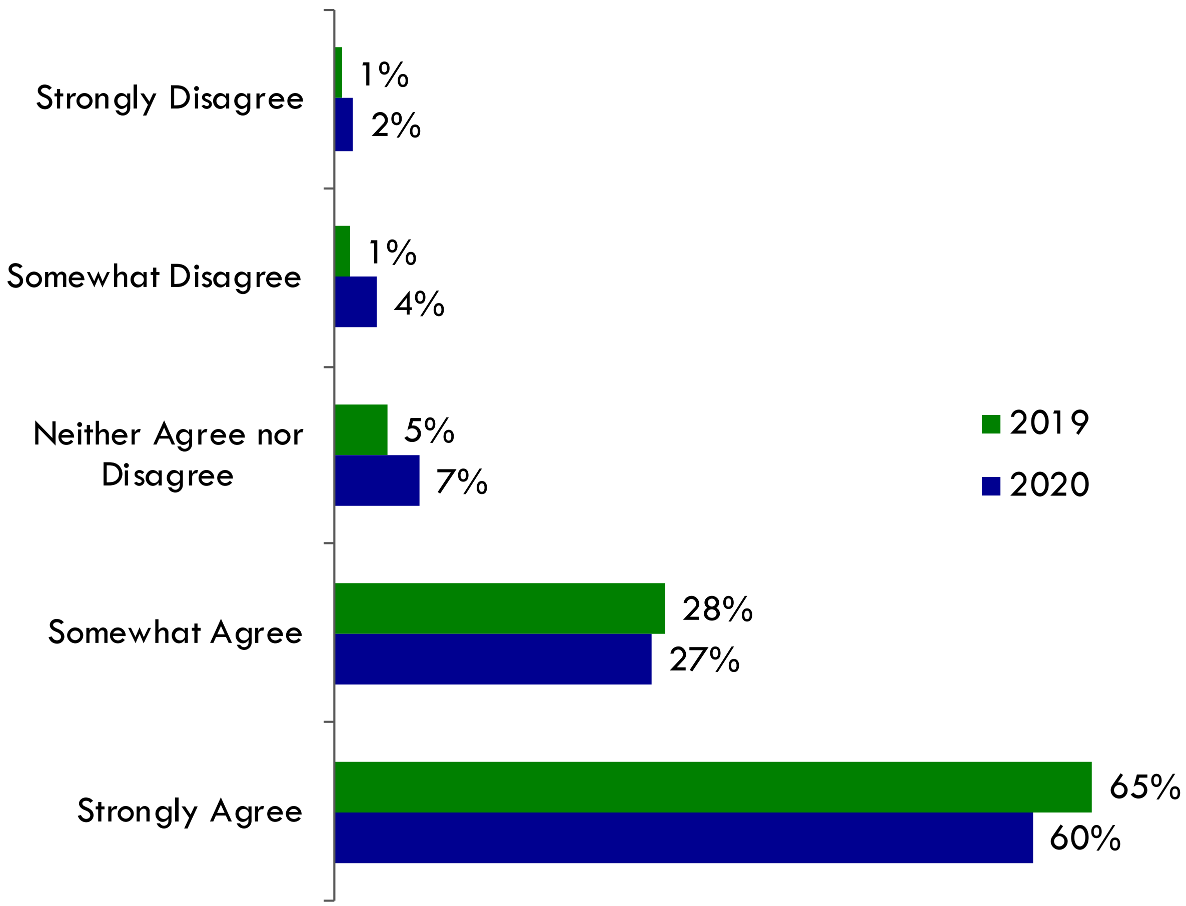
55% of respondents agree that they are willing to pay more, vs. only **40%** in 2019

The percentage who "strongly agree" to paying more has increased from **10%** of respondents to **19%.**

The increase is strongest in Ontario, where the percentage who agree to pay more is up by **75%.**

PART I: DO CONSUMERS STILL CARE ABOUT PLASTIC POLLUTION?

Q: "I consider environmental impacts caused by single-use plastic food packaging to be important"

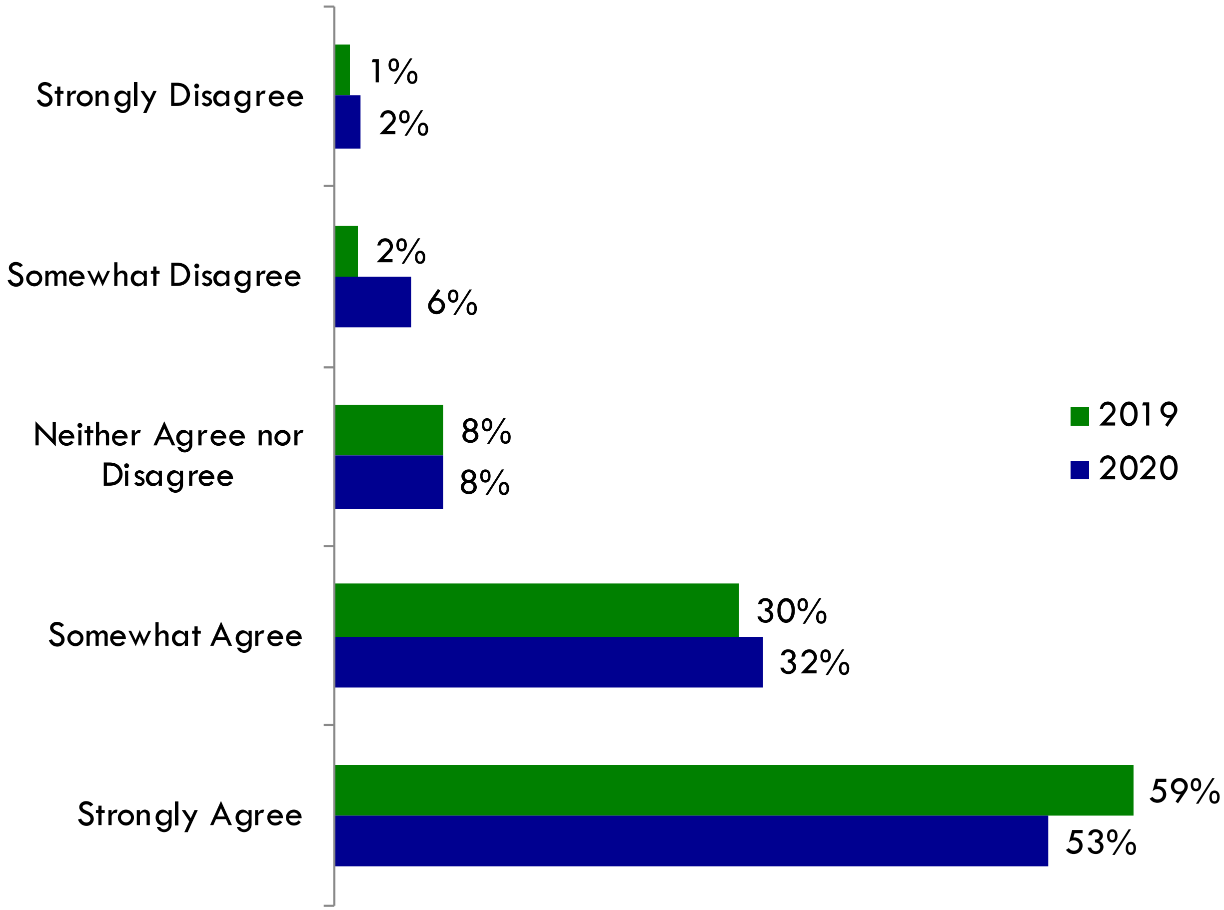


A strong majority of Canadians consider plastic food packaging a serious environmental issue, but the percentage in agreement has dropped from 91% in 2019 to 87% in 2020

Most of the change occurred in males, where support for this statement dropped from 90% to 84%

Those who are aged 40-54, less educated, and living in the Prairies are all less likely to consider environmental impacts important

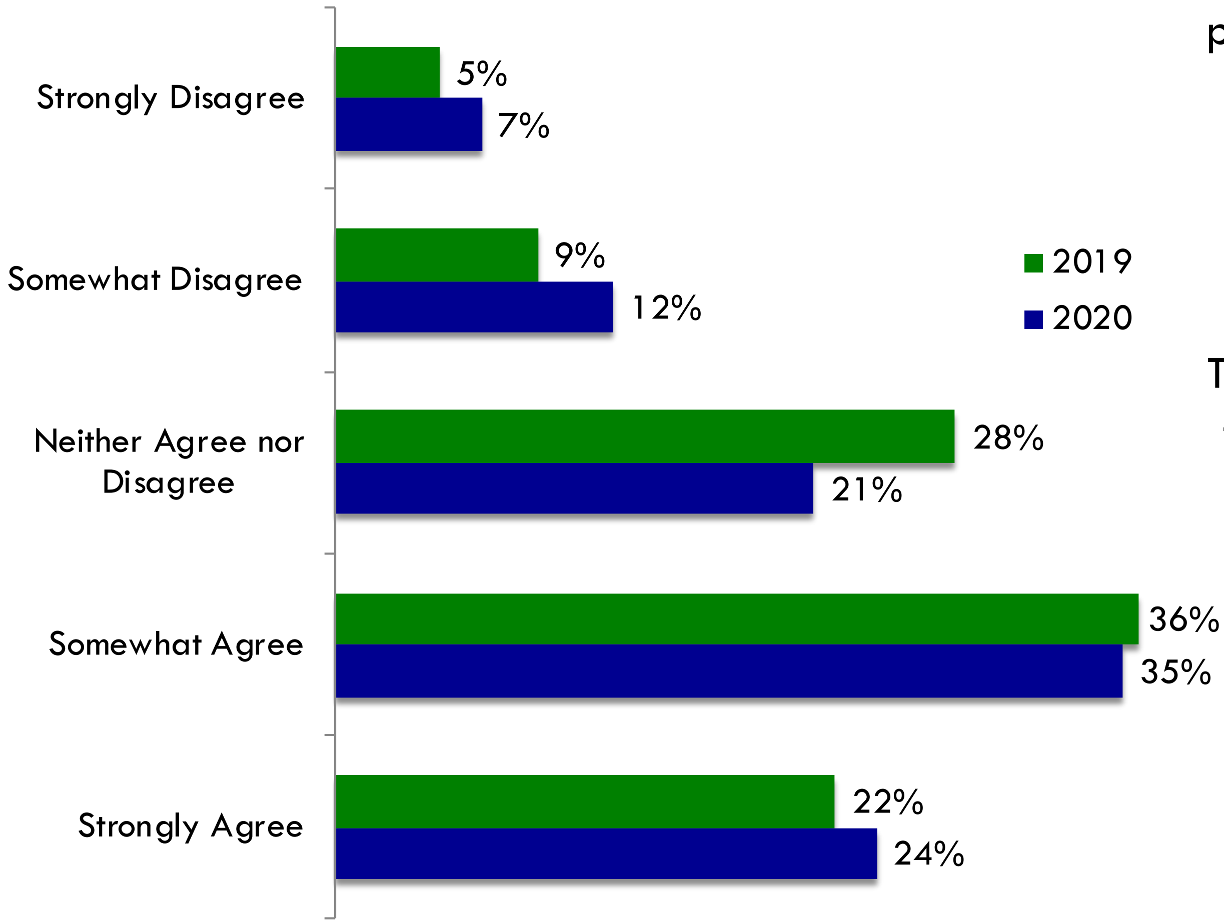
Q: "I am personally motivated to reduce the amount of single-use plastic food packaging because of its environmental impacts"



While motivation to reduce single use plastic food packaging remains high, it is slightly weakened in 2020 - particularly in the "strongly agree" category

While the genders were roughly equally motivated in 2019, in 2020 there is a clear gender disparity: 89% support among women vs. 79% support among men

Q: “I actively shop for non-plastic packaging goods while grocery shopping”



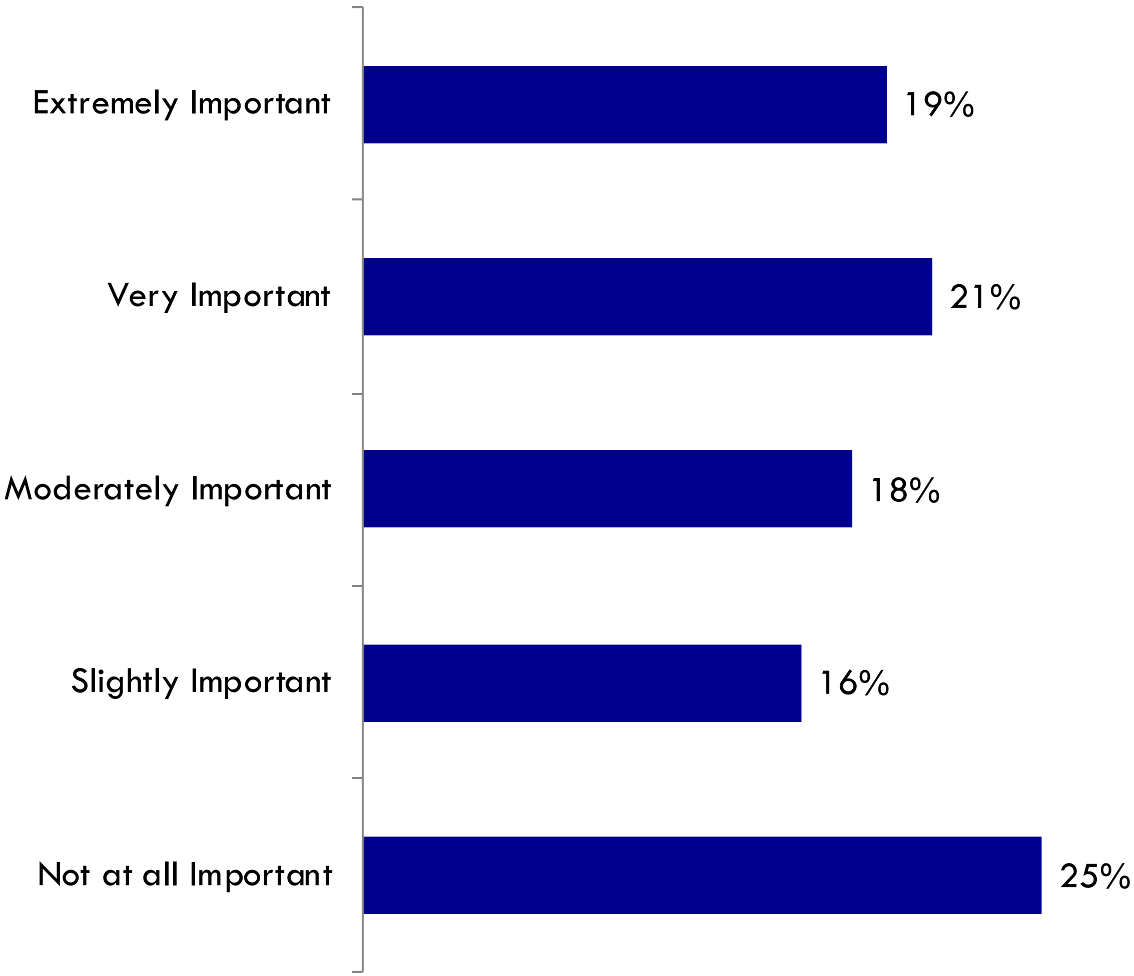
In spite of COVID-19, the percentage of consumers actively shopping for non-plastic packaged goods is up slightly, from 58% in 2019 to 60% in 2020

Those least likely to actively shop for non-plastic packaging goods are:

Male
Less Educated
Suburban
Residents of the Prairies
Aged 40-54
With 2 or more children

PART II: WHAT ARE THE EFFECTS OF COVID ON CONSUMER ATTITUDES?

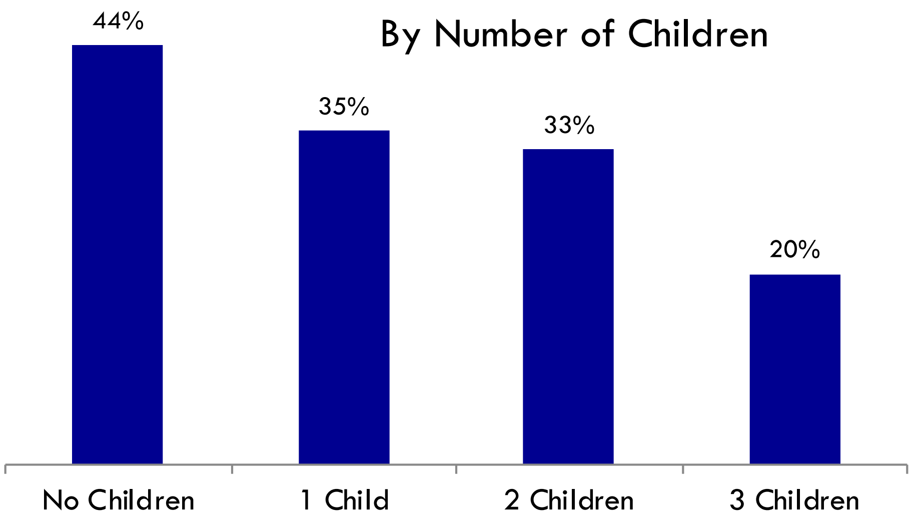
Q: How important are new safety concerns during COVID-19, to consumers' decisions of whether to purchase food items packaged in single-use plastics?

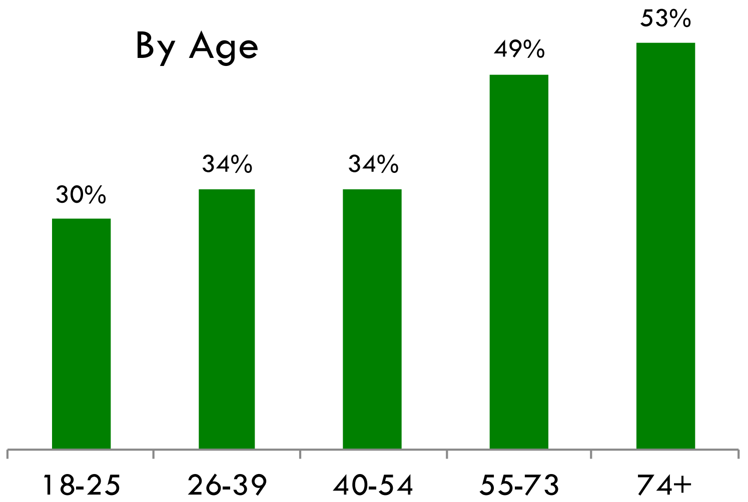


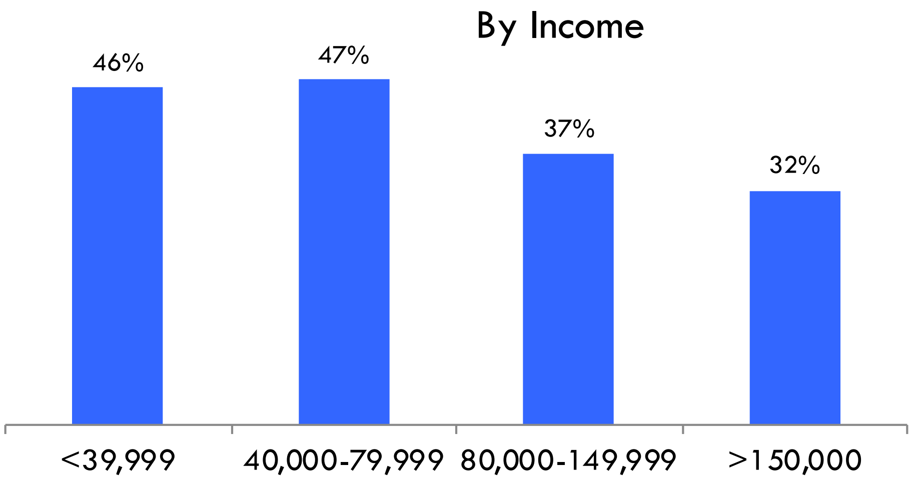
Responses are polarized: While 40% of respondents identify new safety concerns as either very or extremely important, 25% of respondents consider these concerns not at all important.

47% of Females consider new safety concerns to be very important or extremely important, vs. only 34% of men.

Q: How important are new safety concerns during COVID-19, to consumers' decisions of whether to purchase food items packaged in single-use plastics?

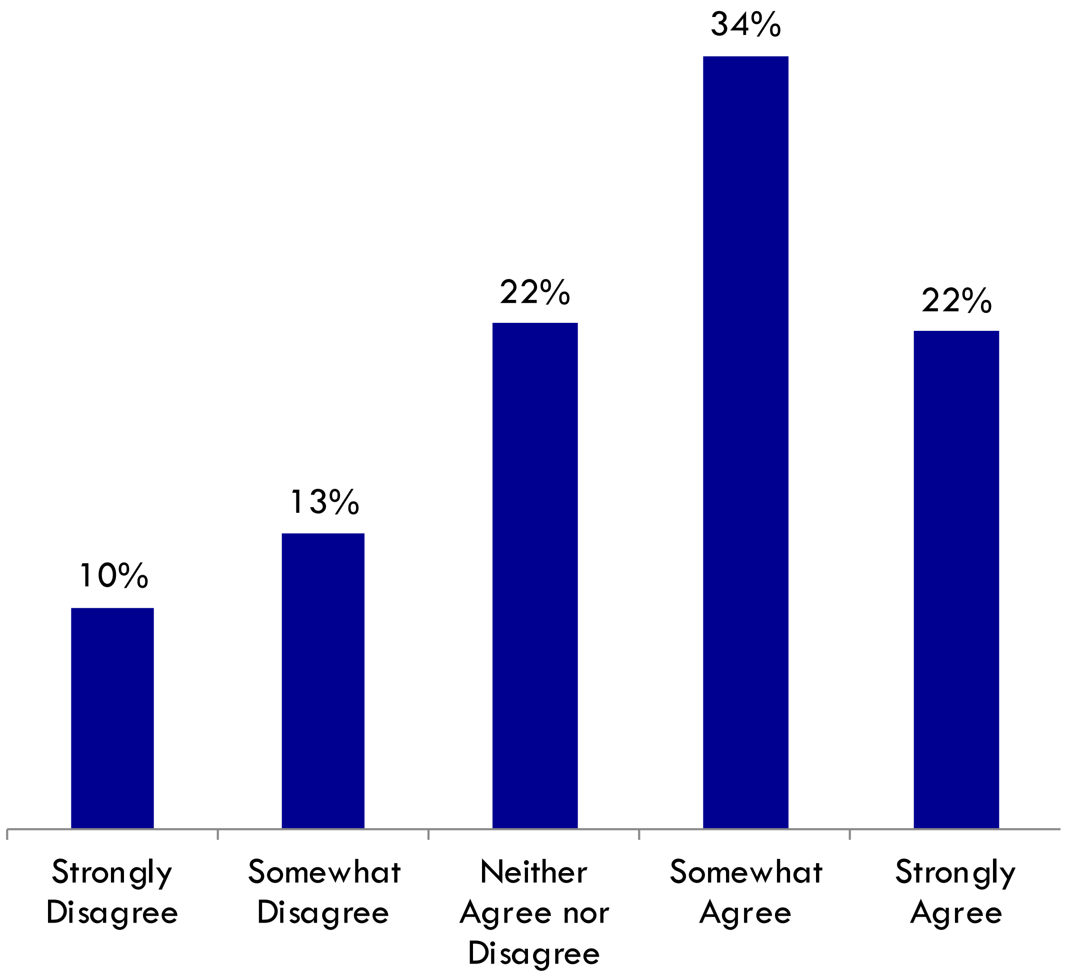






Percentage of respondents who consider new safety concerns during COVID-19 to be either "very important" or "extremely important" to their decision to buy plastic packaged food, by Age, Income, and Number of Children.

Q: "Since the beginning of the COVID-19 pandemic, I have been more concerned about the safety of my food."



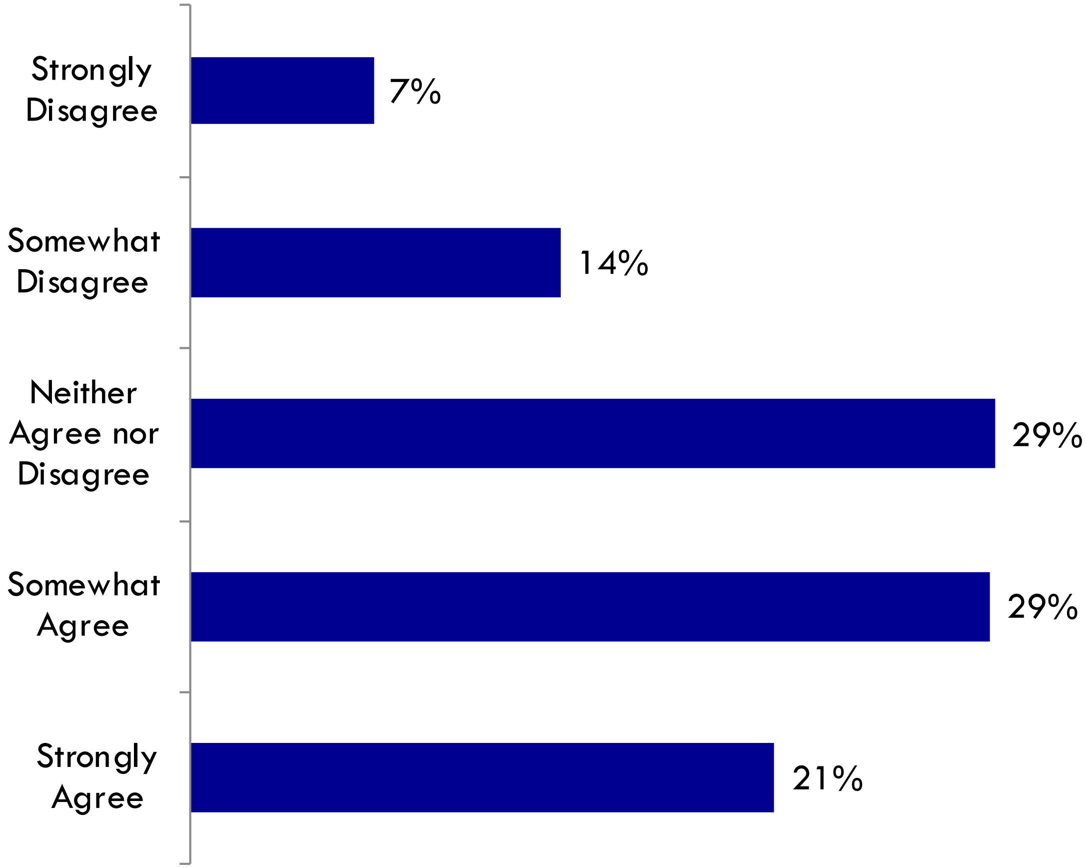
Overall, 55% of respondents agree that they are more concerned about food safety:

Males 52%
Females 58%

Urban 61%
Suburban 55%
Rural 48%

BC 63%
Prairies 46%
Ontario 56%
Quebec 56%
Atlantic 61%

Q: "Since the beginning of the COVID-19 pandemic, I have been more price conscious when shopping for groceries"

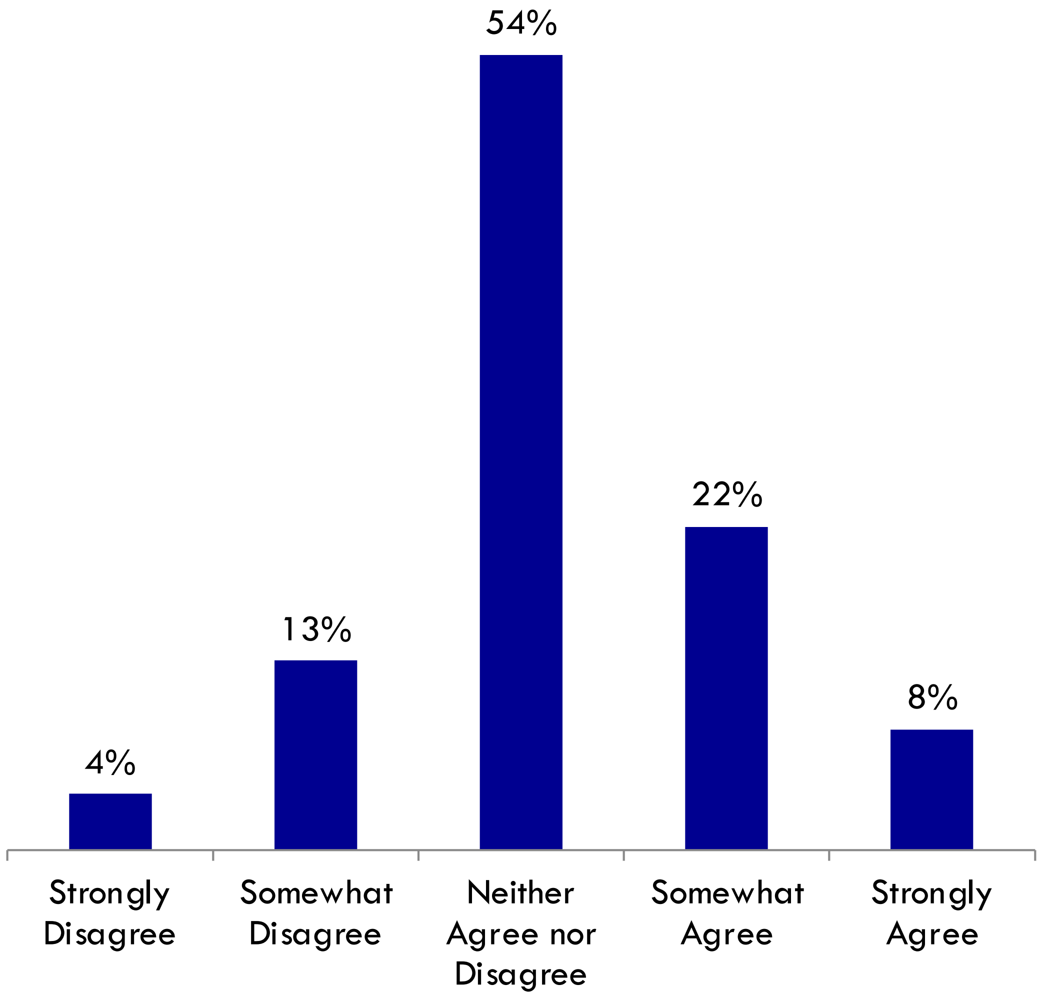


50% of Canadians report being more price conscious during COVID-19.

Responses vary according to income, ranging from 65% agreement in households earning less than $40,000/year to 37% agreement in households making over $150,000/year.

59% Canadians who are or have been receiving CERB/CESB report being more price conscious, vs. 48% of those who have not received benefits

“Since the beginning of the COVID-19 pandemic, I feel that I have purchased more foods packaged in single-use plastics.”



The majority of Canadians (53%) perceive no change in their plastics usage.

29% of respondents feel they are buying more plastic packaging, vs. 16% feel they are buying less

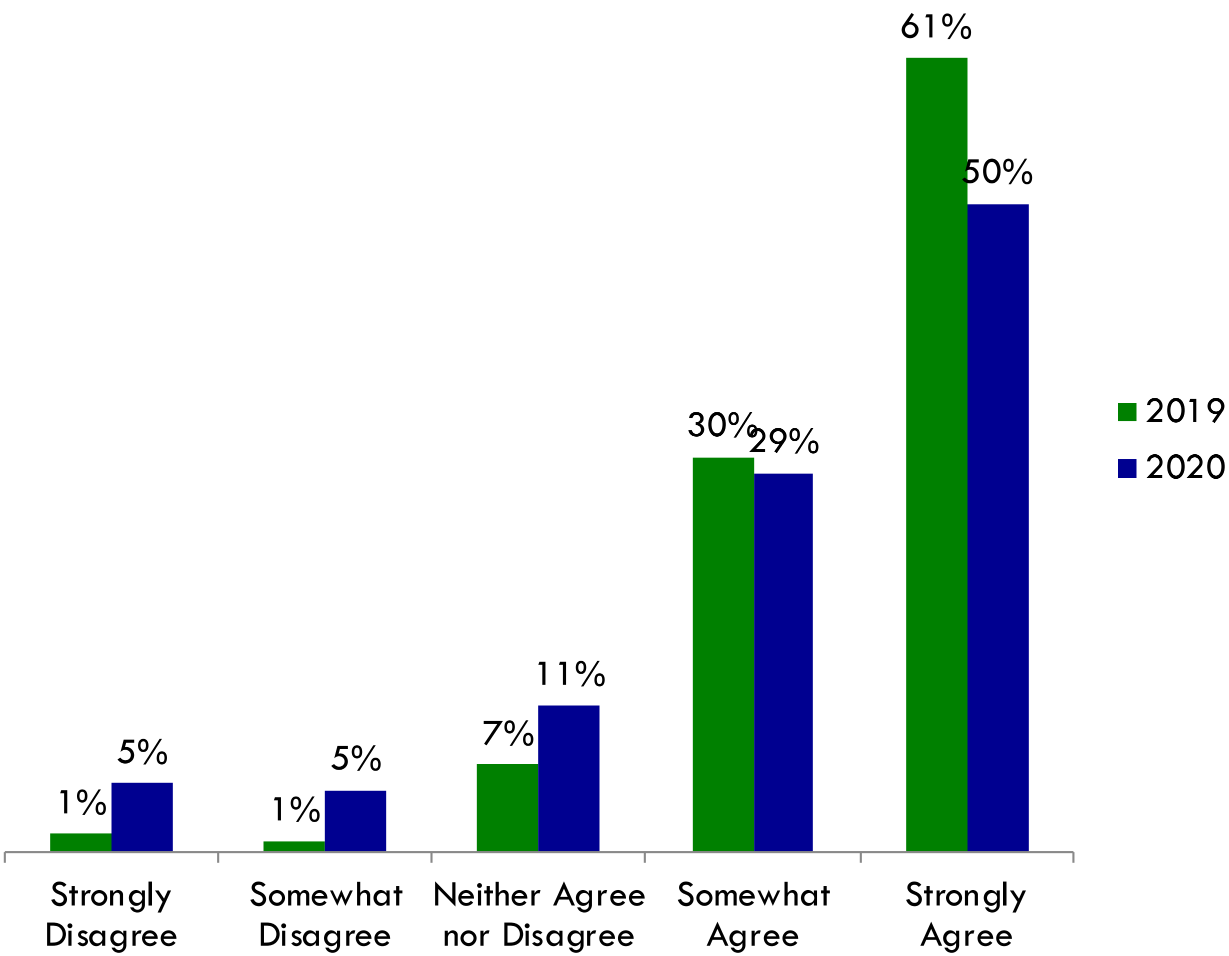
Young people and women are more likely to have increased purchases of plastic packaged foods:

47% of those aged 18-25 and 34% of those 26-39 somewhat or strongly agreed

For those who have purchased more plastics, the most popular reasons were increased take-out and home delivery (44%) and increased safety concerns (43%).

PART III: HOW HAVE OPINIONS CHANGED TOWARDS POLICY OPTIONS?

Q: "Regulations to reduce consumption of single-use plastic packaging for food should be strengthened in Canada"



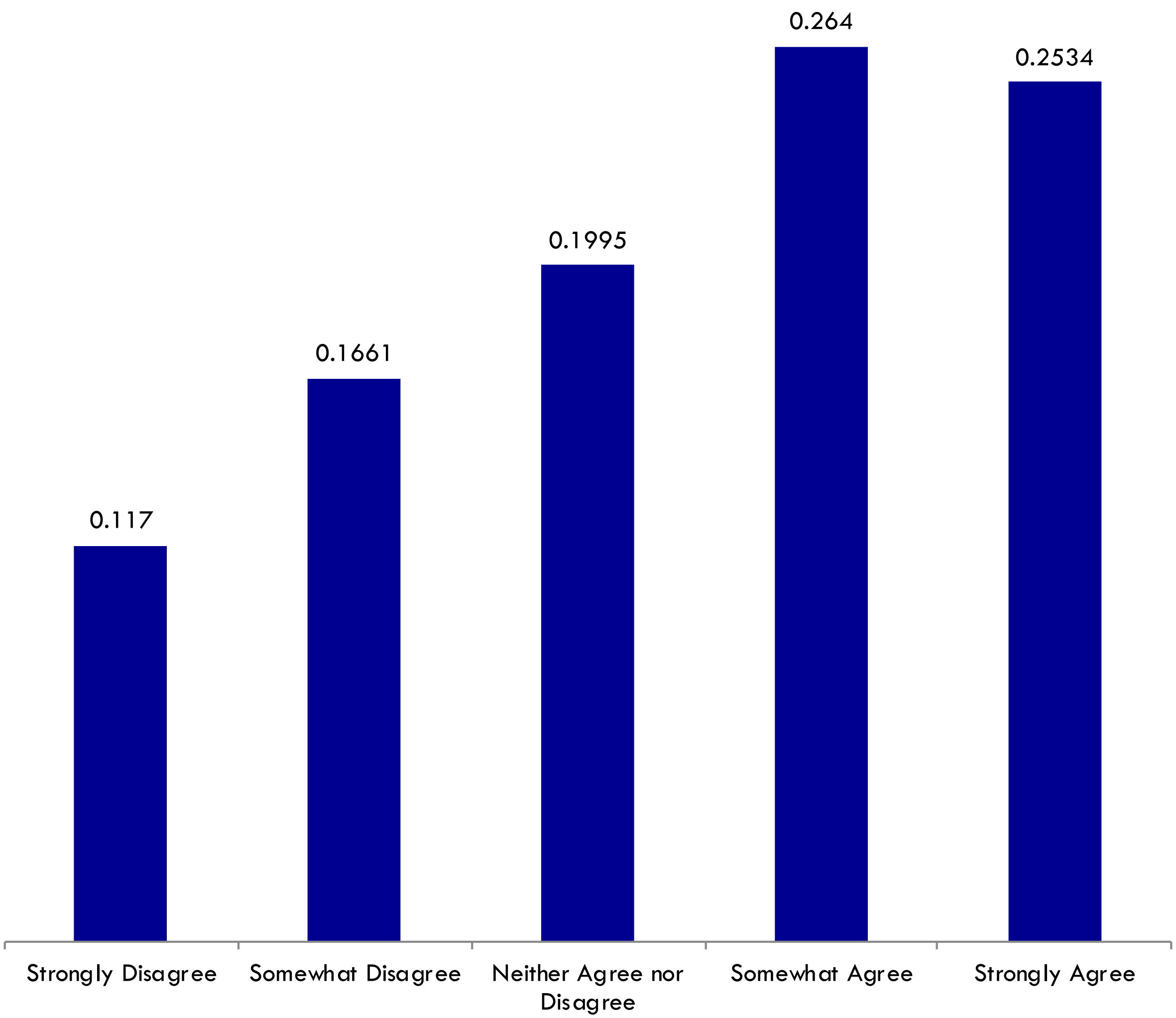
Supported for stronger regulations is down from 90% of respondents to 79%

Dramatic decline in support in the Prairies, from 83% in favour to 66% in favour.

Support for stronger regulations remains strong among females (84%) but declines among males (73%)

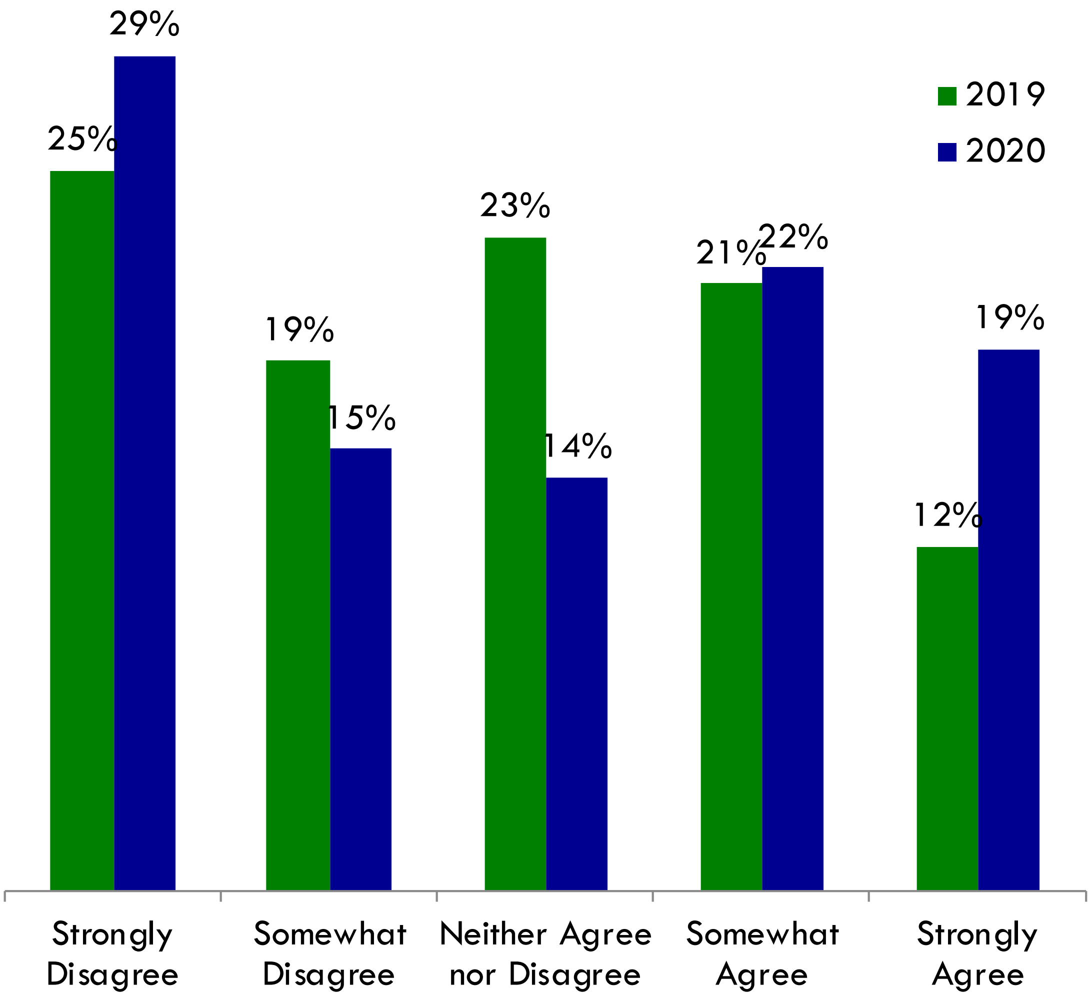
18% respondents feel that their opinions on regulations for single use plastics have been effected by COVID-19, while 43% disagree. 39% neither agree nor disagree

Q: "I believe that any new regulations on single-use packaging in Canada should wait until after the COVID-19 pandemic is fully resolved"



52% of respondents agree that new regulations should wait, with particularly high support from older respondents, less educated respondents, and respondents in the Atlantic provinces.

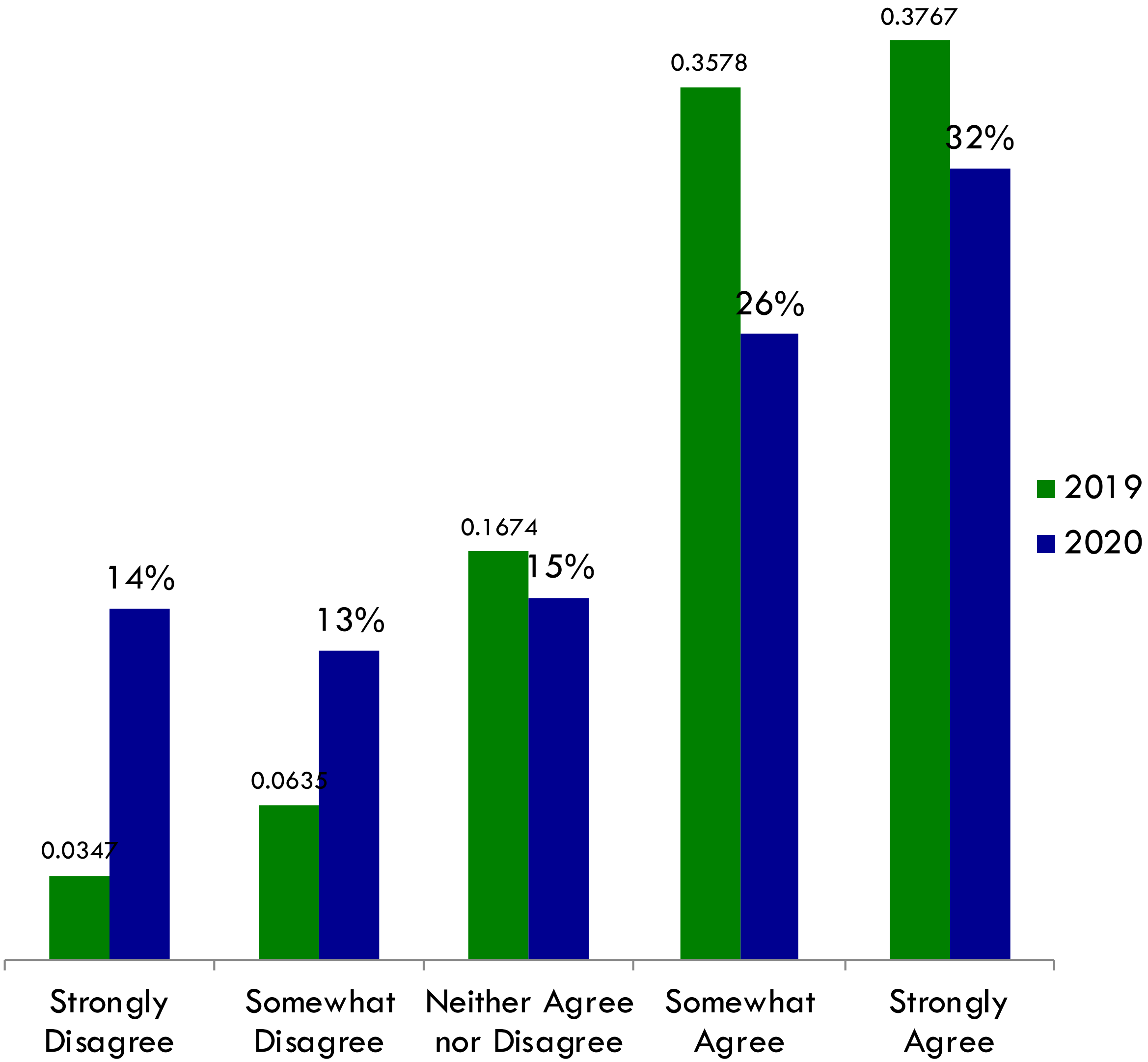
Q: "I would accept paying a government tax to disincentivize consumption of single-use plastic food packaging"



Opinions on a tax have become more polarized, with strong gains in somewhat/strongly agree (41% in 2020 vs. 33% in 2019) but also an increase in "strongly disagree" from 25% to 29%

Respondents in the Prairies are least willing to accept a tax, with 36% strongly opposed. The Atlantic Provinces are most receptive with 50% agreeing to a tax.

Q: “I support a ban of all single-use plastics used for food packaging”

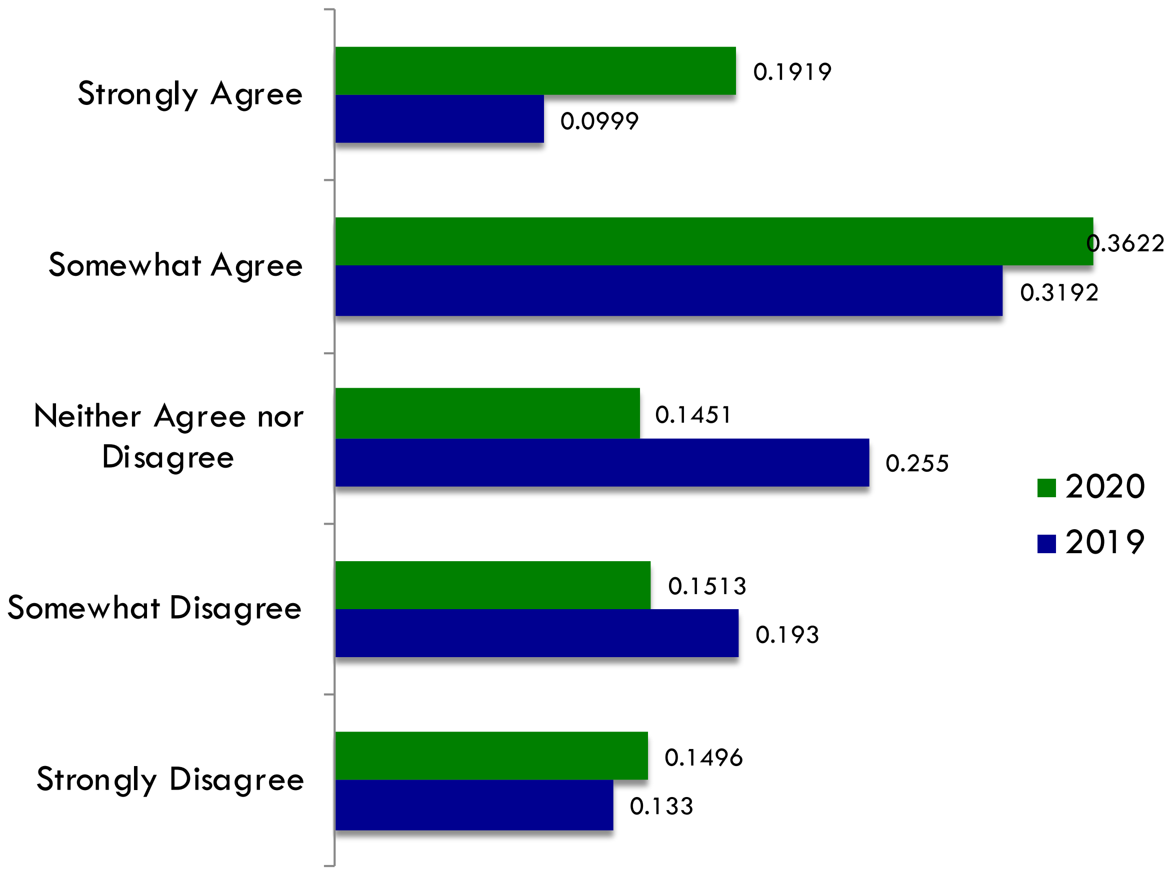


Substantial Decline in support for a SUP ban, from 72% to 58%

Only 51% of males support a ban (vs. 64% of females)

In 2019, a SUP ban was most popular with older respondents; in 2020 it is younger respondents who continue to support a ban, while support is decreased by more than 20% among respondents aged 55 and older

Q: "I am willing to pay more for an item containing bio-degradable packaging", Pt. 1



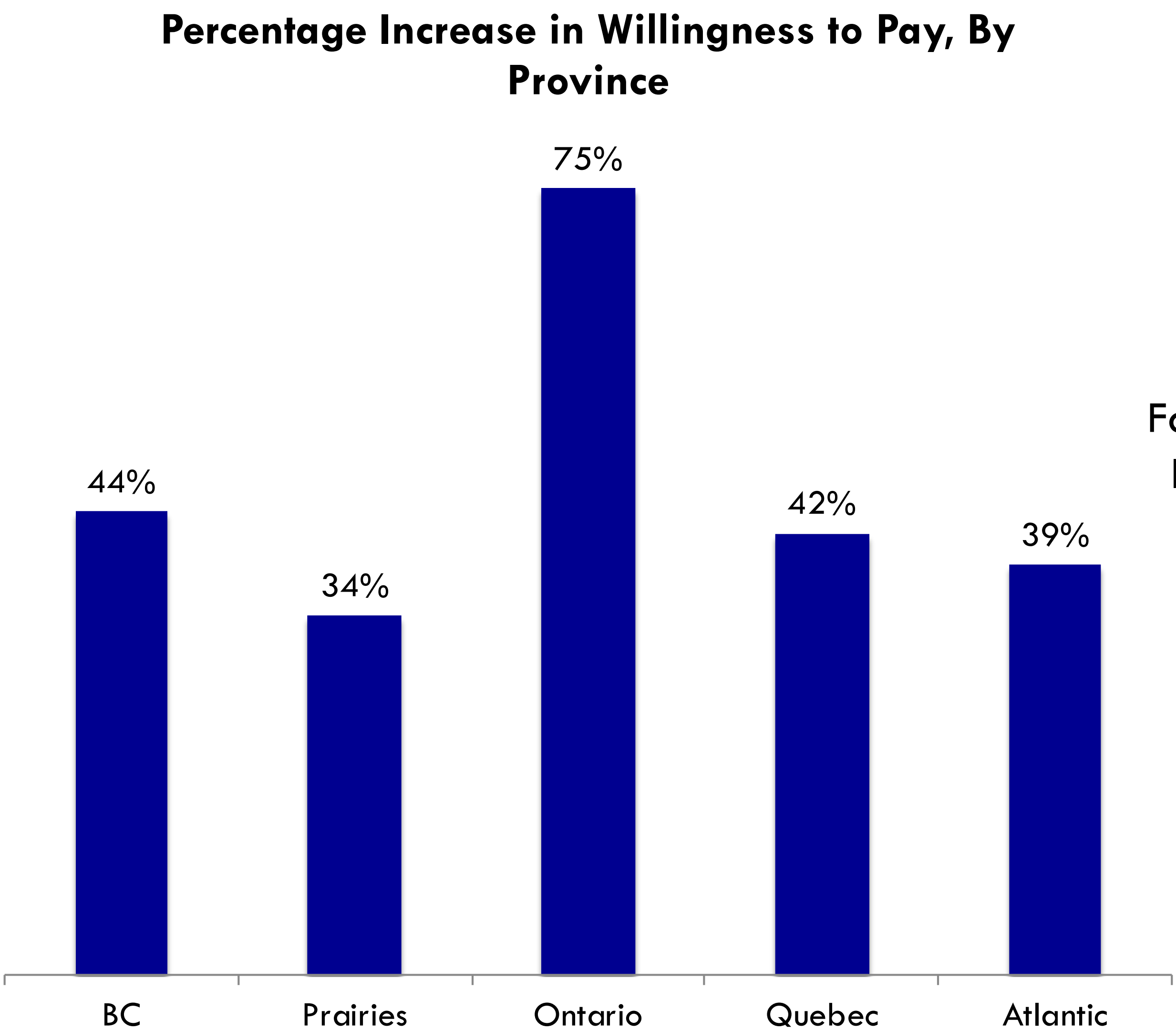
55% of respondents are willing to pay more for bio-degradable packaging, vs. 40% in 2019

The percentage of respondents selecting "strongly agree" increased from 10% to 19%

Stronger willingness to pay among women (59%) vs. men (52%)

Quebec and Atlantic most willing to pay more(62% & 64% agree) vs Prairies least likely to pay more (47% agree)

Q: "I am willing to pay more for an item containing bio-degradable packaging", Pt. 2



Dramatic increases in willingness to pay for bio-degradable packaging in Ontario (75% increase)

Families with more children are less likely to be willing to pay for alternative packaging

Respondents with higher income are more likely to be willing to pay for alternative packaging

PART IV: WHAT ARE THE IMPLICATIONS?

Observations

Implications for Plastics Policy

COVID-19 has clearly altered the landscape of consumer opinion on plastic packaging. While tighter regulations – and even bans – had once looked like near-consensus policy options, that support is now eroded. It appears that many Canadians increasingly recognize the value of food packaging – a trend reflected in the growing opposition to plastics bans, but also in an increased willingness to pay for biodegradable alternatives.

In 2020, any plausible plastics policy must demonstrate clear commitment to consumer health and safety as well as environmental goals. Encouragingly, a growing willingness to pay for biodegradable alternatives may enable more innovative solutions that ensure both safety and sustainability (albeit at some cost to the consumer). With more consumers willing to pay, there is potential for market-based solutions that could be more flexible, and more nuanced, than the blunt instrument of a ban.

Observations

Implications for Plastics Policy

Whatever approach is taken, we must also recognize present economic challenges. The current recession - in tandem with sharp increases in the cost of food - threatens the food security of millions of Canadians. Statistics Canada estimates that, during the lockdown, almost 1 in 7 Canadians lived in a household that experienced food insecurity. These Canadians are directly threatened by any policy that increases the cost of food. While environmental justice demands sustainability, food justice demands affordability; the path forward must strike a balance.

In a globalized food economy, real change in packaging requires coordinated efforts across the supply chain. As the COVID-19 pandemic has brought new attention to supply chain issues, we believe that there is a unique opportunity for reform. The goal should be a food supply chain that is not only more resilient, but also greener and more sustainable. A green supply chain is achievable, but requires cooperation across the sector.