

**The role of packaging on consumer perceptions
and buying habits within the FMCG industry**

By

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DECLARATION

This research has not been accepted for any degree and is not being currently submitted in candidature for my degree.

Signed :

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ABSTRACT

This research investigates consumers' preferences and attitudes towards the packaging of FMCG (Fast Moving Consumer Goods) products and the influence that this packaging has on their buying habits and purchasing decisions. Respondents' likes, dislikes as well as key purchase drivers were examined.

Focus groups were held to gauge the respondent's attitudes and perceptions towards packaging as well as their expectations of what it should be like.

The researcher employed a descriptive research design method using qualitative methods to analyse the data collected.

A total of twenty five focus groups were held, with twelve women in each group (ie 300 respondents).

Respondents consisted of females residing in the Bedfordview, Sandton, Yeoville and Melville areas in Gauteng. One-hour focus groups were held during July, August and September 2003.

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CHAPTER ONE

INTRODUCTION

1.1 Statement of the problem

Packaging is the unsung hero of the global FMCG (Fast Moving Consumer Goods) industry. Changes in ethnic mix, age distribution and shifts in lifestyle have the tendency to alter the landscape of any population. In response to this, global giants within the industry have to implement packaging changes that keep their products in the forefront of consumers' minds and in their shopping carts every week.

With regard to ethnicity shifts, during the 1990's the combined populations of African Americans, Asian Pacific Islanders and Hispanics in the United States grew 13 times more than the non-Hispanic white population. (Henderson, A. 2001, 'Packaging Digest')

These consumers will likely purchase a mix of products that have a stronger ethnic influence than the typical non-Hispanic white American. The buying habits and the purchasing behaviors of these groups need to be carefully examined to confirm that consumer packaged goods companies' products, and all related packaging, are meeting the expectations and needs of these growing population segments.

Illustrating the age shifts, over the next few decades, the United States' population distribution will even out across all age brackets. This phenomenon is largely due to two factors: a decreased number of children being born and an increased life expectancy for older Americans. These age shifts will require consumer companies to re-evaluate their packaging. The decrease in younger Americans will cause packaging and products targeted at children to lose an amount of importance in the overall marketplace. The increase in population of older Americans will require a shift, to packaging that meets their needs eg. packaging that has

convenience of use. Packaging geared toward the needs of this population group will become more important.

Lifestyle shifts are already becoming evident in the American population. An increased number of consumers are eating on the go (while driving, at their desk etc) and there is less and less time available for traditional meal preparation in the home. These changes require consumer goods companies to alter their product's packaging and often preparation techniques to meet the needs of these rushed consumers. Packaging needs to be bright and appealing to catch the fast-moving shoppers' eye. It also needs to easily fit into their lifestyle by offering options in preparation (either conventional oven or microwave) and consumption (either straight out of the refrigerator or at room temperature).

The above is a mere illustration of the power that packaging holds over manufacturers of FMCG (Fast Moving Consumer Goods) products and their need to stay abreast of consumer wants, needs and trends across the globe.

1.2 Objectives of the Study

This research will investigate “The role of packaging on consumer perceptions and buying habits within the FMCG industry.”

Consumers across various LSM (Living Standard Measures) were chosen. This means that consumers across various income groups and lifestyles were chosen. These consumers shop at least once a month at retail stores. This research investigates consumers' preferences and attitudes towards the packaging of FMCG products and the influence that this packaging has on their buying habits and purchasing decisions.

The objectives of the study are as follows:

- a) To examine consumers attitudes towards the packaging of FMCG products
- b) To examine whether packaging plays a role in consumers purchasing decisions and if so how important is this role?

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- c) To investigate and understand the key attributes that consumers look for in packaging ie to investigate the key elements of good packaging
 - d) To determine if packaging needs and wants are specific or unique to certain LSM profiles

1.3 Background of the Study

In today's competitive and demanding retail environment, consumers have to a certain extent been spoiled for both choice and quality. By implication, competition amongst key players in the FMCG (Fast Moving Consumer Goods) industry is rife.

The availability of close substitutes makes differentiation and product offerings less valuable and unique to the consumer. So, one of the most important sources of differentiation, product recognition and on-shelf visibility is packaging.

Customer perception of a package creates brand equity and purchaser loyalty. The image presented by the package largely determines the success or failure of any line. Appearance stimulates memories and emotions inside the purchaser, who oftentimes is female, buying for an entire family. Color imagery and slogans all combine to facilitate customer allegiance. (Altman, A. 2000, 'Loyalty to Brands', Piman Publishers, New York)

Product innovation and packaging design have come a long way in the FMCG (Fast Moving Consumer Goods) industry. In the past packaging played a minimalist role and product quality took precedence over it. With globalisation, technological advances and information sharing, the unique selling properties of brands are diluted and consumers, to a certain extent take product quality for granted and differentiate brands or products based on what they see and feel.

1.4 Structure of the Dissertation

Chapter 2 will present the literature review and focus on what research has been done within this field of study and the key findings pertaining to this study.

Chapter 3 presents the research methodology used.

Chapter 4 covers the results of the study.

Chapter 5 presents the research conclusions and recommendations.

The Bibliography and Appendix follows Chapter 5

CHAPTER 2

LITERATURE REVIEW

Packaging in the FMCG industry is extremely dynamic and innovative. The literature review encompasses research from three key FMCG product groups ie. the confectionery, juice and tea markets. Also literature has been extracted on the different elements of packaging and ultimately the effects on consumers.

The literature acquired for the review below comprises of :

- Consumer Perception and marketing strategy : Consumers understanding and expectations from marketing strategies and packaging of products
- The Lecol Juices : Repackaging launch ; the research undertaken by Kraft Foods SA with the aim of improving packaging in order to stimulate and revive the brand
- Manhattan : Repackaging Launch ; The Manhattan research, also undertaken by Kraft Foods SA in order to improve packaging and clearer segment the Manhattan sweets category
- The Tea Industry : The packaging perceptions and insights within the tea industry
- The Six Facets of Brand Identity : What makes a brand strong in the consumers' eye
- The Brands' Identity : How consumers identify the brand
- The Power of Branding : Visual elements of branding that make a brand work

2.1 Consumer Perception and Marketing Strategy

Information is the primary raw material the marketer works with in influencing consumers. Therefore an understanding of the perception of information is an essential guide to marketing strategy.

Brand logo and name development

Shakespeare notwithstanding, marketers do not believe that “a rose by any other name would smell as sweet” Would we rather have a soft drink sweetened with aspartame or Nutrasweet? Brand names can influence the way food products taste to consumers. (Hawkins, Best & Coney. 2001, ‘Consumer Behaviour and Building Market Strategy’, 7th Ed., McGraw Hill, New York, pp. 210)

Companies such as Namelab use linguistics and computers to create names that convey the appropriate meaning for the products. For example Namelab created “Compaq” for a portable computer that was originally to be called “Gateway”.

The focus of Namelab is the total meaning conveyed by the interaction of the meanings of the name’s parts. For Compaq, *com* means computer and communications while *paq* means small. The unique spelling on packaging attracts attention and gives a “scientific” impression.

In general, concrete terms with relevant established visual images eg Cup-a-Soup are easier to recognise and recall than more abstract terms.

Clearly, brand name influence how consumers interpret product features. How a product or service’s name is presented ie. it’s logo is also very important. The actual power in the type style in influencing consumers’ perception of key attributes of the product is extremely high.

Packaging Design

The art of brand marketing is largely the art of brand building. When something is not a brand, it will probably be viewed as a commodity. Then price is what counts. When price is the only thing that counts, the only winner is the low cost producer. But having just a brand name is not enough. What does the brand name mean? What associations, performances and expectations does it evoke? What degree of preference does it create? If it is only a brand name then it fails as a brand.

(Kotler, P.1999, 'Kotler on Marketing : How to create, Win and Dominate Markets', Simon and Schuster Publishers, London)

This distinction of a brand from a commodity is due largely to packaging of a product and consumers' acceptance, acknowledgement and desire for this product. As we all know, packaging is the only element that distinguishes one brand from another in a supermarket and this has the potential to build on the brand positioning, equity and personality by just sitting on shelf.

It is said that 90% of a consumers' decision to buy is made in the store. Thus when a consumer walks in a beverage aisle for example she instinctively looks for colours, brand names and logos that she is familiar with, without even knowing it. These images are communicated to her via advertising campaigns and most importantly packaging of the product.

The basis of any business is a product or offering. A company aims to make a product or offering different and better in some ways that will cause the target market to favour it and even pay a price premium. But products differ in the degree to which they can be differentiated. At one extreme are the so-called commodities, such as basic chemicals, metals, salt, fruit and vegetables and so on. Marketing talent is tested with the so-called commodity products. A commodity is simply a product waiting to be differentiated. (Kotler, P.1999, 'Kotler on Marketing : How to create, Win and Dominate Markets', Simon and Schuster Publishers, London)

Consider the examples below of successful commodity products :

- Columbian Coffee – Whenever a coffee manufacturer or retailer wants to advertise good coffee, it advertises that it uses Columbian coffee. At one time, Columbian coffee beans might have been among the best but coffee beans from Brazil, Argentina and other places are probably on par
- Marlboro Cigarettes – The flavours of most well known brands of cigarettes are pretty similar. Many cigarette smokers will not be able to identify the brand of cigarettes they are smoking in a blindfolded test
- Absolut Vodka – By legal definition all vodka is the same. In a blindfold test most people will not be able to identify the brand of vodka that they drink.

This leads us to believe that differentiation exists in the mind only and the advantage is that it gives manufacturers and marketers the opportunity and challenge to differentiate products based on packaging. (Kotler, P.1999, 'Kotler on Marketing : How to create, Win and Dominate Markets', Simon and Schuster Publishers, London)

Package design must perform two critical tasks – capture attention and convey meaning. Unfortunately, the techniques appropriate for accomplishing one task are often counterproductive for the remaining task.

So what should a manager do to attract attention to a package? As with most aspects of the marketing process, it depends on the target market, the product and the situation.

If the target market is interested in the product category or in the firm or brand, attention will not constitute much of a problem. Once consumers are exposed to a message, they will most likely attend to it. Unfortunately most of the time consumers are not actively interested in the product. Interest in a product tends to arise only when the need for the product arises. Since it is difficult to communicate with them at this point, marketers have the difficult task of trying to

communicate with them at times when their interest is low or non-existent. (Crainer S. 1995, 'The Real Power of Brands', Pitman Publishing, London)

Packaging therefore has to be appealing in a way that not only attracts a need from the consumer but also curiosity and appeal – and that is the challenge.

Warning Labels

Both ethical and legal considerations require marketers to place warning labels on a wide array of products (alcoholic beverages, cigarettes, tampons, over-the-counter drugs etc).

These can range from general warnings such as those on cigarette packages to warnings that apply to only a small portion of the population eg. "Don't use this product if you have diabetes" The government, consumer groups and ethical marketers want the warnings to accomplish their primary task ie. they should effectively alert the potential user to the risk associated with using the product in a manner that allows the consumer to make an informed decision regarding the product. In addition marketers do not want warnings to detract unduly from the image of the product or cause an inappropriately negative assessment of risk to benefit ratio.

Despite the fact that many warnings are ignored, there is substantial evidence that well designed warnings are beneficial and respected by the consumer. The challenge is to design warnings with a maximum likelihood of being successful.

Warnings incorporated onto packaging should be designed and tested in the same manner as key elements of standard commercials and ads. The first step is to understand the needs and vocabulary of the target audience. As one expert concluded "Warnings are designed with input from consumers about what they wish to know and how and when they wish to know it, would not only provide a greater number of options for warning content, it is also likely to increase the probability that a given warning will have its intended effect". (Crainer S. 1995, 'The Real Power of Brands', Pitman Publishing, London pp. 128)

Many of the same issues involving warning labels also arise in design labels to convey nutritional information.

Colours

The colour red is very effective at attracting consumers' attention and interest. However, while physically arousing, red is also perceived as tense and negative. A softer colour such as blue is less "attention-attracting" and arousing. It is perceived as calm, cool and positive. Research has indicated that blue is superior to red in terms of generating positive outcomes for both the retailer and the consumer. (Hawkins, Best & Coney. 1997, 'Consumer Behaviour and Building Marketing Strategy', 7th Ed., McGraw Hill, New York)

2.2 Lecol Juices : Re-packaging launch

2.2.1 Background

Kraft Foods South Africa is the second largest Food Company in the world present in over 30 countries across the globe. Amongst the vast array of FMCG (Fast Moving Consumer Goods) products marketed by Kraft Foods, Lecol Squeeze 'n Drink and Squashes are amongst the most established brands within the beverage portfolio. These two concentrated juice brands are in direct competition to Oros Orange, Super 7 and Sweeto.

When shopping within a supermarket one cannot help but notice the many brands and variants available within the concentrated juice sector. Part of this attributed to the fact that “ready to drink” juices eg. Liquifruit are priced at a premium, which unfortunately the majority of South Africans cannot afford. The cheaper alternatives to fresh fruit juices are concentrated juices, which can be diluted. The juices offer an advantage in both price and volume.

The huge demand for these juices, especially amongst the bottom end market, has lead to manufacturers flooding the market with different offerings hence cluttering the shelves and confusing the consumer.

In 2003 Kraft Foods SA wished to refresh and enhance the brand image of the Lecol Squashes and Squeeze 'n Drink in order to drive successful growth in this competitive market. Thus the labels have undergone a ‘face lift’, to create a more eye-catching, modern, bright and refreshing image.

The two major objectives of the proposed changes were :

1. To enhance strong visual appeal to improve on-shelf impact
2. To create improved thirst and appetite appeal

Research was commissioned to assess the impact of the packaging changes on consumers' perception of Lecol Squashes and Squeeze 'n Drink.

2.2.2 Research undertaken

The marketing business objectives of the research were to design an attractive Lecol label that will :

- Be more impactful on shelf than Oros Orange and Oros flavoured squashes, Super 7 and Sweeto
- Appeal to mothers and their children
- Communicate the flavours better
- Expand upon the unique pouring ritual of the cap and the squeezing of the bottle

a) Primary Research Objectives :

- To ascertain consumer reactions to proposed Lecol Squash Labels
- To ascertain consumer reactions to proposed Squeeze 'n Drink label

b) Secondary objectives :

- To establish brand imagery
- To establish the impact of label changes on respondents :
 - Perceived intrinsic benefits
 - Overall liking
 - Specific likes and dislikes
 - Packaging recognition on shelf
- To establish the suitability of the Kraft logo on the Lecol label

2.2.3 Methodology of Research

In a world where functional attributes can easily be copied, positioning and differentiation through image communication is vital. Packaging plays a very important role at the point of purchase – direct contact. (Hawkins, Best & Coney. 1997, ‘Consumer Behaviour and Building Marketing Strategy’, 7th Ed., McGraw Hill, New York pp. 129)

Kraft SA wished to reposition Lecol Squash and Squeeze ‘n Drink with proposed label designs, while still ensuring that the change is in line with what Lecol stands for. A new pack design was tested in context of the whole brand offering, not only on the aesthetic design.

The methodology was sequential monadic product testing in a face to face interview.

The aim of the research were to identify differences in product ratings as a result of pack changes.

2.2.4 Sample design and respondent selection

A total of 400 interviews were conducted face to face in Gauteng, Durban and Cape Town split between syrup and squash users as follows :

- 200 Lecol squash interviews – 100 users and 100 non-users
- 200 Squeeze ‘n Drink interviews – 99 users and 101 non-users
- Mothers and their children were targeted, LSM 6-10 profiles

2.2.5 Research Results

- Amongst non-users, Lecol was not generally perceived as having attractive packaging
- The proposed packaging had a positive impact on the overall product appeal despite the fact that the product did not change
- Significantly greater portion of users and non-users rated Lecol orange squash as appealing in proposed packaging (77% and 71% respectively) compared with current packaging (64% and 54% respectively)
- The proposed packaging enhanced perception of key product drivers
- The average perception of fruitiness of Lecol orange squash significantly improved with the new packaging even though the product remained the same
- Aesthetics and design of proposed label perceived to be significantly more appealing – high appeal to both users and non-users
- Proposed packaging had a positive impact on perceptions of label aesthetics
- Significantly greater proportion of respondents perceive the proposed label to be modern, bright and refreshing
- Perceptions held by Lecol user and non-user significantly improved
- The Lecol lid was highly disliked and it was cited as one of the reasons of not purchasing the product – “the lid wears out easily and was not good quality”

Will the proposed pack be more outstanding?

- Squash users indicated strong favourability to proposed Lecol label. Their perceptions of the Lecol offerings were significantly enhanced by the proposed label – perceived to be more modern, eye-catching and refreshing
- Respondents also felt that the proposed label was more suitable for Lecol than the current label
- Reactions to the Lecol pack indicates that on-shelf impact will be improved by proposed label

- Proposed packaging also had a positive impact on non-users. As approximately 50% of non-users have Lecol in consideration set, improved perceptions held by this market could result in a shift
- Squash users indicated that the Lecol Squash lid is not accepted – lid may be creating a barrier to usage



Fig 1 : The above 4 pictures are of the new Lecol packaging
Consumers found these designs favourable and very appealing

2.3. Manhattan Sweets : Re-packaging launch

2.3.1 Background

In 2001 Kraft Foods SA undertook qualitative research to investigate and identify key consumer insights within the soft sweets category. It also aimed to highlight opportunities to further grow the Manhattan market shares.

The sugar-based category is extremely competitive and there is little difference seen between brands. Product innovations are easily copied and there is not much sustainable advantage. Innovation and renovation are the key drivers in this market as consumers want to see new products and improved packaging on a regular basis.

Also, the category is not heavily supported with above-the-line advertising (chocolates excluded). Sales result from a stimulus at the point of sale ie. displays in the store and packaging.

2.3.2 Research Undertaken

a) Primary research objective :

- The overall research aim was to evaluate the current standing of Manhattan in relation to competitor offerings.

b) Secondary research objectives :

- Consumer perceptions and preferences in terms of product intrinsics and packaging
- Manhattan and competitor delivery in terms of product intrinsics and packaging
- The influence of packaging and branding on consumer choice
- Motivators for choice of a particular product type
- Motivators for choice of a particular brand

2.3.3 Research Methodology

Due to the exploratory nature of the research, both qualitative and quantitative research were undertaken :

Qualitative :

Eight group discussions were held amongst :

- mothers of 5-9 year olds (x2)
- mothers and their children aged between 5-7 years (x2)
- children aged 8-12 years (x3)
- teenagers aged 13-15 years (x1)
- Mothers = regular sweet purchasers
- Children = regular sweet eaters

Quantitative :

- 500 brief telephonic interviews conducted amongst females
- All respondents – responsible for household grocery purchases

Sample design and Respondent selection :

- Race distribution : Black =39%, White = 38%,Coloured = 15%, Asian = 8%
- LSM distribution : LSM 5-6 = 28%, LSM 7-8 = 72%
- Areas = Durban, Gauteng, Cape Town

2.2.3 Research Results

a) Key research findings indicated that :

- The “theme” packaging is not differentiating the products on shelf
- The windows (see through portion) on the packs were not big enough for the consumer to view the actual product – consumers need to see the product before purchasing
- The colours of the packs were not bright enough to stand out from competitors like Beacon
- The tops of all the packs looked the same ie consumers very easily bought the wrong pack of sweets
- Children could not pronounce the word “ Manhattan” properly when telling their moms which sweets to buy
- The Manhattan logo was too boring and dated and not in keeping with the “unreal world” theme (the Manhattan pay-off line)

Proposed Changes :

- The windows on the packs should be larger to facilitate easy viewing
- The logo has been upgraded to a much more modern look, in keeping with the “unreal world” theme as well as international trends
- Each character on the pack of each sweet has a name and a profile on the back of the pack ie. a bit of information about the character, his friends etc. for the entertainment of children. Also little kids who cannot pronounce the word Manhattan can tell their moms eg. To buy a pack of sweets with “Arnie the Ant on the cover”
- All the Manhattan sweets have been segmented into 4 lands in keeping with the unreal world theme. The 4 lands are Candy land, Jelly land, Gummi land and Mallow land. Each of these lands contains a particular type of sweets eg. Gummy land has all the chewy sweets like Gum Babies, Baby bears and Wine gums

- The packaging is much brighter as compared to the old packaging – it now stands out much more prominently as compared to competitors on shelf
- Overall appeal of the packaging is better

New packaging illustration compared to old packaging



Fig. 2 Illustrates the old Manhattan logo vs the new.

As per the above illustration, the new Manhattan logo is much more appealing



Fig 3 Illustrates the 4 Manhattan lands

The above illustration shows the four lands that the entire Manhattan land has been broken down into. These lands will appear on each of the respective packs.

2.4 Packaging in the tea industry

The broadest trend in retail tea is the expansion of cardboard packaging. Other packaging trends exist but are more narrowly focused. On the lowest demographic end, plastic packets are expanding the market territory among the rural indigent, on the most upscale end. The materials used for packaging include brass, ceramic, porcelain, fine hardwoods and micro-engineered tins.

While such prestigious packaging elevates the status of the entire tea trade, this top line contains only a fraction of a single percent of the tea sold worldwide by net weight. The most popular mid range, packaging format, cardboard captures the majority of market share.

Countless millions of cardboard tea boxes sit on the store shelves throughout the world. These boxes are the primary vehicles for tea brands and company slogans to reach consumer awareness. Companies in this competitive business are now allocating additional money for more attractive packaging. Graphic designers and advertising experts are amongst the highest paid professionals hired by successful tea companies. Even lawyers enter the packaging picture, advising on proper labeling of trademark, copyright, nation of origin, net weight, contents, health and purity claims.

Customer perception of a package creates brand equity and purchaser loyalty. The image presented by the package largely determines success or failure of a tea line. Appearance stimulates memories and emotions inside the purchaser, who oftentimes is female, buying for an entire family. Colour, imagery and slogans all combine to facilitate customer allegiance.

Tea executives ie. Senior Management overseeing brands like Lipton and Five Roses are routinely sophisticated in production, tax avoidance and a hundred other business topics. Yet they rarely understand packaging design. The executives, almost always men who authorize final decisions on

packaging generally lack artistic design knowledge. Good tea packaged in a dull box can earn a profit, but will sell below potential.

Precise hues, tints and shadings do influence consumer choice, as market research consistently demonstrates. Blue is the best example. For household products bought by women, blue packaging generates more sales. The tea industry remains behind many consumer goods sectors in performing market research about packaging. If you are interested in an education in the power of integrating blue into packaging, walk down the laundry product aisle. (www.teaindustry.com)

Tea companies that are subsidiaries of larger corporations tend to enjoy packaging and branding advantages. The world's most widely distributed branded tea, Lipton is a relatively small component of Unilever, a leader in the entire household goods category and one of the most powerful corporations in existence. Unilever owns the newest tea product with the potential to substantively change consumer habits: Lipton's cold brew blend. This brand's top box and upper front are cyan blue with a soft deep red banner. The main colour of the front and sides is a sunny yellow.

Both yellow and red can attract a shopper, helping the tea package to stand out from the many other brands sharing shelf space. Blue is one of the least intimidating colours, rarely generating a negative impression and often conveying positive emotions like security and relaxation in specific hues like baby blue, sky blue and powder blue. All are friendly, safe and modestly charming images with an air of calm family lifestyle. (www.teaindustry.com)

Unilever protects its brand names, slogans and packaging innovations with trademark and copyright. One package of Cold Brew Blend displays the registration mark six times and the copyright notice once. Skillfully re-enforcing the brand name in the public mind, the word "Lipton" appears 21 times in various sizes, on the 48 count teabag retail cardboard box. These 21

brand name “hits” are accomplished without ostentation and represent modern use of packaging to entrench brand equity. (www.teapackaging.com)

Lipton knows a cardboard box is more than just a container for the tea inside, serving double duty as potent publicity. Packaging labels send signals not just to consumers, but to other tea companies, proclaiming legally protected status for brand names, slogans, logos, design and text, warning competitors of duplicating their use.

Complexity arises with truly global branding however national tea companies maintain an advantage by marketing consistent colours across national boundaries, re-enforcing global branding. The colour of currency and the colour of human skin may vary among regions of the world but a truly global corporation can create a uniformity of appearance impossible for any other entity, even a government. (www.teapackaging.com)

2.5 Six Facets of Brand Identity

A specific set of concepts and tools is needed for tackling the new type of market we are in. When products were rare, the Unique Selling Proposition was the key concept. As we leave brand image, positioning and personality behind, we enter the modern age of brand identity.

In order to become or to stay strong, brands must be true to their identity. The notion of brand image is both volatile and changing : it focuses too much on brand appearance and not enough on brand essence. The notion of brand identity shows that communication managers are now willing to look beyond the surface for the brands innermost substance. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

The identity concept is crucial for three reasons. A brand :

- 1) Needs to be durable
- 2) Needs to send out coherent signs
- 3) Needs to be realistic

It is thus a defence against the risk of an idealized, fickle or opportunistic brand image.

The Identity Prism

- 1) A brand first of all has physical qualities – it's physique. Physique is both a brand's backbone and its tangible added value. If the brand is a flower its' physique is a stem. Without the stem, the flower dies. This is how communication to a consumer via packaging works: focusing on know-how and classic positioning, relying on certain key products and brand attributes. Physical appearance is important. Thus the first step in defining

a brand is to define its' physical aspect: What is it concretely? What does it do? What does it look like?

It is true that modern packaging tends to standardise brands, making them all clones of one another. Thus in using the image of its traditional bottle, Coca Cola aims to remind us of its roots. There are several delicate issues regarding Coke's physical aspect. For example, is the dark liquid part of its identity? If this is the case then there could never be such a thing as Crystal Coke, even though there is such a thing as Crystal Pepsi.

Many brands have problems with their physical facet either because their functional added value is weak or because they cannot manage to determine who they are. It is significant for instance that Malibu no longer defines itself as a Caribbean light drink but as Caribbean white rum. The former definition focused more on image than on content, whereas the latter helps better identify what the drink actually is. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

2. A brand has a personality of its own. By communicating it through its packaging, it gradually builds up character. The way in which it speaks of its products or offerings shows what kind of person it would be should it be human.
3. A brand has its own culture, from which every product derives. The product is not only a concrete representation of this culture, but also a means of communication. Here culture means the set of values feeding the brands inspiration. Major brands are certainly driven by a culture but, in turn they also convey this culture (eg Benetton, IBM, Coca Cola).

The cultural facet is a key to distinguishing the difference between Adidas, Nike and Reebok – Culture lies behind what the brand looks like on shelf.

Countries of origin are also great cultural reservoirs for branding: Coca Cola stands for America as does IBM, Nike or Levis. One of the bonuses of Evian or Perrier is that the branding also represents a part of the French culture. Culture is what links the brand to the firm, especially when the two bear the same name. Because of its culture, Nestle has not been able to convey the message of a fun and enjoyable food brand. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

Brand culture plays an essential role in launching a new type of alcohol. Like any psychotropic agent, alcohol is indeed risky. It risks generating pleasure (the nice feeling of tipsiness) but also fear. One must therefore be able to implicitly reassure consumers on packaging. When launching a new brand of spirits companies need to give it some history and roots. It cannot just look like a pure marketing product, it must look genuine. That partly explains why Malibu's recent advertisements set in the Caribbean and why Jameson Irish whiskey invested so much money in rebuilding their old distillery, the Jameson Heritage Centre. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

4. A brand is a relationship. Indeed brands are often the crux of transactions and exchanges between people. Nike bears a Greek name that relates to its specific cultural values, to the Olympic Games and to the glorification of the human body. Nike also suggests a peculiar relationship based on provocation: it encourages us to let loose (just do it).

This is communicated on all packaging and advertising to consumers. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

5. A brand is a reflection. When asked for their views on certain car brands, People immediately answer in terms of the brands perceived client type : that is a brand for fathers! That is a brand for young people! That is a brand for show-offs!

Because of its communication and its most striking product build up after time, a brand will always tend to build a reflection or an image of the buyer or user which it seems to be addressing.

Reflection and target often get mixed up. The target describes the brand's potential purchasers or users. Reflecting the customer as he/she is not the target; rather the customer should be reflected as he/she wishes to be seen as a result of using the brand. It provides a model with which to identify.

Coca Cola for instance, has a much wider clientele than it reflects (15-18 year olds). How can such a paradox be explained? For the younger segment (8-13 year olds), the Coca Cola protagonists embody their dream, what they want to become and do later on when they get older.

As for adults, they perceive them as representative as a certain way of life and of certain values rather than of a narrowly defined age group. Thus the brand also succeeds in bringing 30 or 40-something consumers to identify with its way of life. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

6. Finally a brand speaks to your self image. If reflection is the target's own internal mirror, self image is also the targets own internal mirror. Through our attitude toward certain brands, we indeed develop a certain type of inner relationship with ourselves

These are the six facets which define the identity of the brand as well as the boundaries within which it is free to change or develop. The brand identity prism demonstrates that these facets are all interrelated and form a well structured entity. The content of one facet echoes that of another. The prism concept derives from one basic concept – that brands have a gift of speech.

Brands can only exist if they communicate. As a matter of fact they grow obsolete if they remain silent or do not undergo repackaging in line with consumer needs.

Since a brand is a speech in itself (as it speaks of the products it creates and endorses the products which epitomise it), it can thus be analysed like any other speech or form of communication. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

2.6 The Brand's Identity

The product is the first source of brand identity. A brand indeed reveals its plan and its uniqueness through the products it wishes to endorse. A genuine brand does not usually remain a mere name printed on a product ie a mere graphic accessory added on at the end of a production or distribution process.

The brand actually injects its values in the production and distribution process as well as in the corollary service offered at the point of sale. The brands value must therefore be embodied in the brands' most highly symbolic products. (Crainer, S. 1995, 'The Real Power of Brands', Pitman Publishing, London)

It is true that each brand spontaneously brings to mind certain products – some more than others – and actions as well as a certain style of communication. The prototype products are representative of the various facets of brand identity. According to some cognitive psychologists, such products may convey brand identity, but above all they generate it. Brand intangible and tangible realities go hand in hand: values drive reality and reality manifests these values. (Crainer, S. 1995, 'The Real Power of Brands', Pitman Publishing, London)

Colour does not merely serve to position the brand, it is the outward sign of ideology, a set of values and brand culture. In its very name "United Colours of Benetton" as in its posters showing a blonde and a black baby, the brand expresses its inspiration and its idealistic vision of a united world in which all colours and races live together in harmony. Colour then ceases to be a mere feature distinguishing the manufacturer. It is a banner, a sign of allegiance. (Lewis, D. 2000, 'The Soul of the New Consumer', 1st Ed., Nicholas Brealey Publishing, London)

All major brands thus have a core product in charge of conveying the brand's meaning. Chanel has its gold chain, Chaumet its pearls and Van Cleef a patented technique of setting stones in invisible slots. These feature do not merely characterise the products, they actually embody the brands values. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page, London)

2.7 The Power of Branding

Brand Names

The brand's name is often revealing of the brand's intentions. This is obviously the case for brand names which from the start are specifically chosen to convey a certain objective or subjective characteristic of the brand. But it is also true of other brand names which get chosen for subjective reasons rather than for any apparent objective or rational ones: they too have the capacity to mark the brand's legitimate territory.

The brand's name is thus one of the most powerful sources of identity. When a brand questions its identity, the best answer is therefore to thoroughly examine its name and so try to understand the reasoning behind its creation. Many brands make every effort to acquire qualities which their brand name fails to reflect or simply excludes altogether eg. Apple sounds fun, not serious. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

Brand Characters

Just as brands are a company's capital, emblems are the brand's capital equity. An emblem serves to symbolize brand identity through a visual figure other than the brand name. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

It has many functions such as :

- 1) To help identify and recognize the brand
- 2) To guarantee the brand
- 3) To give the brand durability – since the emblems are permanent signs thereby enabling the company to capitalize on it

To help differentiate and personalise : an emblem transfers its personality to the brand. In doing so, it enhances brand value. But it also facilitates the identification

process in which consumers are involved

The red grouse, symbol of Scotland and a rare bird, has been chosen as the emblem of Famous Grouse whiskey in order to reflect the aesthetic ideal of its consumers.

Emblems epitomize more than one facet of brand identity; that is why they play such a crucial role in building identity capital. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

Many other brands have been chosen to be represented by a character. A character can, for example be a brand's creator and endorser or endorser other than the creator. It can also be a direct symbol of the brand's qualities (Nestle's bunny rabbit, Mr Clean, the Michelin bibendum). Some characters serve to build a certain relationship and an emotive prescriptive link between the brand and its public. Such characters say a lot about brand identity. They were indeed chosen as brand portraits, ie as the brand's traits in the etymological sense. They do not make the brand yet they define the way in which the brand brings to reality its traits and features. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

Visual symbols and logotypes

Everybody knows the Mercedes emblem, Nike's dash and Nestle's nest. These symbols help us to understand the brand's culture and personality. They are actually chosen as such: the corporate specifications handed over to graphic identity and design agencies mainly pertain to the brand's personality traits and values. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

What is important about these symbols and logos is not so much as they help identify the brand but that the brand identifies with them. When companies change logos it either means that they or their brands are about to be transformed: as soon as they no longer identify with their past style, they want to start modifying it.

Some companies proceed otherwise to revitalise the brand and recover their identity, they milk their forlorn brand emblems for the energy and aggressiveness they need in order to be able to change. Just as human personality can be reflected in a signature, brand essence and self image can be reflected in symbols. (Noel, K. 1997, 'Strategic Brand Management', 2nd Ed., Kogan Page Publishers, London)

2.8 Summary of the Literature Review

Elements such as the brand logo, name, warning labels, design of the pack and colour of packaging have a profound effect on a product, whether the actual quality of the product is good or not. When viewed as single elements, they might not be impactful but when put together, they combine to form a product that consumers trust and will purchase. Very often a product can initiate trial based on a feeling that is communicated to the consumer. It is the above elements, that when put together appeals to some aspect of a consumer's personality or senses.

The Lecol research undertaken by Kraft Foods SA to assess consumer perception of the brand was very successful in getting consumer dislikes of the brand and highlighting areas for improvement. Although a packaging change was not the only basis for the research, it came out very strongly that this is what the brand really needed. Consumers had no problems with the existing product but felt that the new product label gave a message of a better taste and drinking experience. The re-launched designs have had a huge impact on consumer perception of the brands as well as intent to purchase. Buyers and store merchandisers have also started to see the brand in a new light ie a modern, fun brand as opposed to a dated, dull brand that has always looked the same.

The research undertaken by Kraft Foods SA with regard to the Manhattan brand gives us tremendous knowledge on the influence of packaging on consumers' desire to purchase a product. It was found that consumers desired a better-packaged product in order to induce purchase. Consumers felt that the existing package did not meet their needs in the following ways:

- 1) They could not decipher the distinction between packs
- 2) They could not see the products from the outside of the pack
- 3) They were not attracted to the packaging which was dull and did not stand out on shelf

Packaging across the entire range was revamped totally and re-introduced to the market. On-shelf presence was very distinct and consumer acceptance and take-off was tremendous. This shows the influence that packaging has on the purchasing decisions of consumers.

The tea industry is one of a mixture of different tastes. Certain consumers prefer tried and tested old brands that have been around for hundreds of years and with that, minimum packaging change. On the other end of the spectrum are consumers that want change, are not afraid to try new things and expect packaging to be constantly evolving with the times. To strike a balance between these two sets of consumers is difficult hence you will notice the wide array and form of packaging within this market. Offerings range from tins to sachets to cardboard boxes and consumers prefer it that way, where their individual needs are catered to. Sometimes different packaging preferences have nothing to do with the product but are nonetheless the preferred option.

The six facets of brand identity are :

- Physical qualities
- Personality
- Culture
- The relationship with consumers
- The brand as a reflection
- Self image

These 6 facets give the brand its “soul”. It is the essence of everything the brand stands for and everything it wants to stand for. Bringing these six elements together on shelf and communicating this to the consumer as she walks by is a crucial task.

Consumers these days are spoilt for choice and when these six facets come together to make the consumer feel that the brand has been created for him/her – the branding exercise has been well executed.

The brand's identity is made up of everything that embodies the brand's value. This can comprise of everything and anything that is linked to the brand and includes elements like symbolisms, type of advertising campaigns, target market reach and brand image.

All major brands have a core product or trait in charge of conveying the brand's meaning.

The power of branding re-iterates the importance of actually focusing on the product's message that comes through individual elements like the brand name, brand characters, visual symbols and logotypes. All of these elements form the basis of the brand's capital equity. Does the name actually convey what the brand is actually about? Does the logo actually embody the brand personality and positioning statement? Countless marketing success stories have emanated from a simple name change merely because consumers could not link the brand name to the product.

Brand logos are becoming increasingly popular in advertising campaigns as advertisers are continually looking for ways to become more innovative while at the same time keeping the communication simple.

Advertising recall should always be linked to the physical product i.e. as soon as a consumer sees a product on shelf she should spontaneously recall all communication on the brand in the last 3 months at least – ideally.

CHAPTER 3

RESEARCH METHODOLOGY



3.1 Research Methodology

Focus groups were held to gauge the respondent's attitudes and perceptions towards packaging as well as their expectations of what it should be like.

Focus groups are interactive, discussion groups held for the purpose of research. The discussion is of a very informal nature and it is controlled in the sense that the researcher can monitor the discussion and redirect if need be, to create optimal results.

Respondents were also tested on whether their buying habits were affected by packaging on various FMCG (Fast Moving Consumer Goods) products.

The reasoning behind the selection of females only is because :

- 1) Females constitute the majority of grocery shoppers
- 2) Females respondents are more receptive to controlled and observed group discussions
- 3) Females had more time availability and flexibility than males

The researcher employed a descriptive research design method using qualitative methods to analyse the data collected.

A total of twenty five focus groups with twelve women in each group (ie 300 respondents) were held at the researcher's place of work, book club meetings and the local library hall.

Respondents consisted of females residing in the Bedfordview, Sandton, Yeoville and Melville areas in Gauteng. One-hour focus groups were held during July, August, September 2003.

To avoid a low response rate, focus groups were held where consumers' responses

were gauged immediately. All focus groups were tape recorded, with respondents' approval. Descriptions and experiences of the researchers' observation were transcribed soon after the focus groups took place.

The researcher utilised this approach, as it was the most suitable and convenient way to obtain the required information.

3.2 Sampling

For the purpose of this study, the target population was females between the ages of 25 to 50 years who reside in urban areas and who do 95% of the household shopping. All respondents fall within the LSM 4 - 10 profiles. This ratio is further broken down between the four target areas. In order to eliminate some sampling bias, respondents were chosen from two upper income areas; Bedfordview and Sandton, one middle income area; Melville and one lower income area; Yeoville. All these areas fall within Gauteng.

The random variables that were measured were the respondent's personal information ie. age, income group, race, gender; their perceptions, attitudes and expectations from packaging in consumer goods as well as it's influence on their buying habits or intention to purchase. All respondents were given a free gift bag of sweets and chocolates as a thank you gift as well as a formal letter detailing the aims of the research and the researcher's appreciation of their co-operation.

The sample consisted of 300 respondents residing in and around the Bedfordview, Sandton, Yeoville and Melville areas in Gauteng. The focus groups were held and information gauged immediately so the response rates were high. Due to the lack of appearance of six respondents, others fitting the same profile replaced them.

3.3 Focus Group Design

The Focus groups were divided into three sections, Section A, B and C.

Section A consists of personal details and demographics ie :

- Age
- Income group
- Area of residence

Due to the personal nature of this information, respondents were required to write down the details on a piece of paper, which was collected by the researcher.

This section was included to ascertain whether discrepancies are evident with different LSM profile consumers with regard to their perceptions, attitude etc. on packaging of FMCG goods.

Section B consists of :

- Consumers attitudes and perceptions towards packaging of FMCG (Fast Moving Consumer Goods) products
- Any examples of good and bad packaging that they recall
- Consumer insights on different packaging formats

Section C consisted of :

- Specific details that stood out from different packaging formats ie the researcher took the following products out :
 - A box of Skip washing powder detergent for clothes
 - A can of Doom insecticide spray
 - A can of Airoma Air Freshener
 - A box of Lipton tea bags
 - A bottle of Robertsons spices – Pepper grinder
 - A packet of Simba chips – Tomato flavour
 - A bar of soap – Palmolive Milk and Honey

-
- The above products were chosen because of the diversity that they represent with regard to the consumers shopping bag
 - These products were brought out to test the respondents spontaneous mentions of the intrinsic features of the product ie, format, colour, size, wording, brand image etc.

3.4 Research Validity and Reliability

The research results appear to accurately reflect what was intended to be measured.

3.5 Representativeness

Sample Loss

A few respondents namely 6 did not show up at the focus groups despite confirming their attendance. In this case the researcher rescheduled the group and brought in others who fitted the same profile. Respondents were compensated for their inconvenience with a little gift.

Reporting Errors

It is very difficult to eliminate reporting errors completely, but every precaution was taken to keep this to a minimum. Error would have come about when respondents felt the need to agree with what the rest of the group is saying merely because they did not want to illustrate an opposing view. In case the researcher stepped in and redirected the discussion.

3.6 Limitations of the Study

A sample was employed in this study. Therefore respondents to the focus groups were restricted to areas and people most accessible at that time. This resulted in some degree of selection bias.

Any study employing the use of focus groups may have some degree of weakness in that certain respondents tend to dominate the discussion and/or influence the rest of the groups' opinion on a certain issue.

CHAPTER 4

RESULTS OF THE STUDY

In order to generate a logical flow in the results chapter, it will be broken down into 3 sections ie :

- (1) A brief description of the sample and their demographics
- (2) An examination of the themes that arose from the research
- (3) Examination of additional questions generated by the study

4.1 Description of the sample

4.1.1 Description of the sample

The sample size consists of respondents from 4 different areas within Gauteng. These geographical areas put together give us a broad spectrum of LSM profiles, gender, race and lifestyle.

The demographics are broken down as follows :

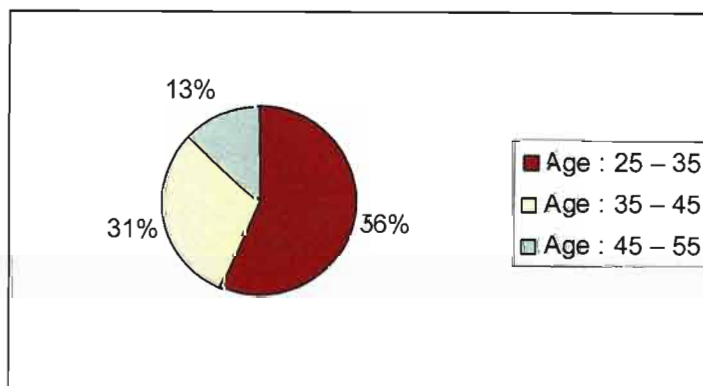
Demographics	Bedfordview (75)	Sandton (75)	Yeoville (75)	Melville (75)
Female respondents	75	75	75	75
Male respondents	0	0	0	0
Black respondents	5	27	51	40
White respondents	56	32	2	13
Coloured respondents	3	6	15	7
Indian respondents	11	10	7	15
Income : Below R20K	3	5	46	16
Income : Between R20K-R100K	26	23	19	48
Income : Between R100K-R200K	41	34	9	5
Income : Above R200K	5	13	1	6
Age : 25 – 35	42	35	48	39
Age : 35 – 45	23	21	13	25
Age : 45 – 55	10	19	14	11

4.1.2 Percentage Split of the Respondents

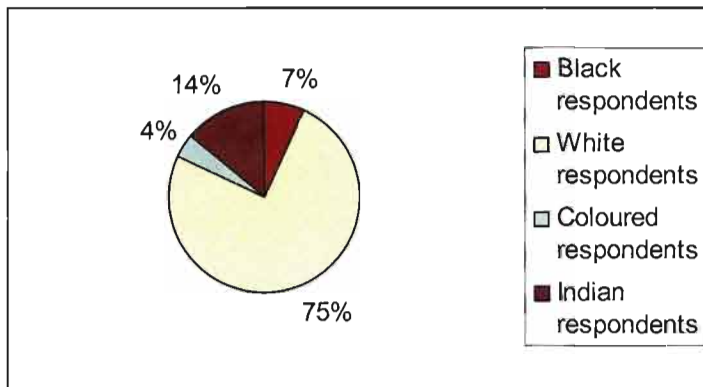
Demographics	Bedfordview (75)	Sandton (75)	Yeoville (75)	Melville (75)
Female respondents	100%	100%	100%	100%
Male respondents	0	0	0	0
Black respondents	7%	36%	68%	53%
White respondents	75%	43%	3%	17%
Coloured respondents	4%	8%	20%	10%
Indian respondents	14%	13%	9%	20%
Income : Below R20K	4%	7%	61%	21%
Income : Between R20K-R100K	35%	31%	25%	64%
Income : Between R100K-R200K	55%	45%	13%	7%
Income : Above R200K	6%	17%	1%	8%
Age : 25 – 35	56%	47%	64%	52%
Age : 35 – 45	31%	28%	17%	33%
Age : 45 – 55	13%	25%	19%	15%

4.2 Graphical Representation of Respondent Selection

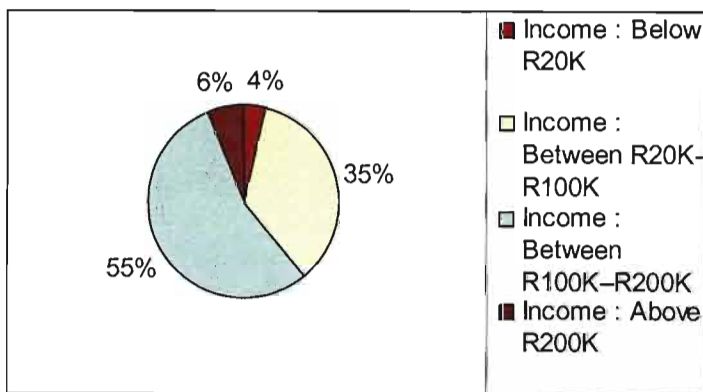
a) Age Distribution



b) Race Distribution



c) Income Distribution



4.4 Themes that have arisen from the study

4.4.1 Respondents' acknowledgement of different types of packaging

Respondents were very much aware of the different types of packaging formats available, the branding and colours of various product types. Spontaneous mentions of brands that kept coming up were Coke, Sunlight dishwashing liquid and Five Roses tea.

All respondents felt that packaging played an important role in buying decisions; however they felt that quality was just as important. Comments that arose were "I will never buy a product that looked good on shelf if it did not deliver on results", "Good packaging does catch my eye at the shops, if I'm not in a hurry" and "I wish more packaging could be biodegradable".

Price played an important role as well. Respondents were not willing to pay too much for attractive packaging even though they thought it was important. Comments that arose were "I rather have more product in the bottle than a better packaging" and "I am going to throw it out anyway-I don't want to spend lots of money on it".

What also came out strong was that black, lower income respondents did not appreciate good packaging as much as white respondents. They much preferred product quality and long lasting products. Comments were "I rather spend more on Sunlight liquid than any cheap brand because it lasts longer than other cheap dishwashing liquids" White respondents, middle to upper income, appreciated packaging a lot more than black respondents did, they (white respondents) almost expected attractive packaging, from a grocery product especially.

4.4.2 Respondents' link between packaging and purchasing decisions

Some respondents' purchases were based on sales supplements received in the post or inside newspapers. Respondents purchasing decisions were always predetermined before walking into a store however there was a small percentage (12%) that did make spontaneous decisions in the store based on product promotions, special pricing and coupons. These spontaneous decisions involve either purchasing a product in bulk format, if pricing was attractive or purchasing indulgent products eg. chocolates and chips.

When at the store and looking at the shelves, 60% of consumers browse the shelves before making a choice. As one white respondents said "I will go into a store knowing that I need sugar, but only when I get to the shelves then only do I decide what brand of sugar I will choose". All white respondents in upper and middle income categories agreed with this statement except for 7 who felt that shopping is a time consuming effort which should not be prolonged, they therefore knew exactly what brand of grocery they were going to purchase before going into the store.

Black consumers, although they did browse a little to see what new products were on the market, ultimately chose the brand that they have always bought ie a brand that they trusted.

Packaging in general, across all respondents did attract their attention initially and would entice them to pick up the product and look at it at least. If it contained everything that they wanted and it was a good substitute or complement to their usual purchase then they would purchase it, provided the price was within their budget.

4.4.3 Respondents' definition of attractive packaging

Respondents were quite bold and certain about what they wanted to see in FMCG (Fast Moving Consumer Goods) packaging. The following are the characteristics that they admired or demanded in good packaging:

- Packaging had to be bright enough to stand out from competitors on shelf
- Respondents instantly recognized and made spontaneous mentions of symbols and company emblems eg. The ship on the Robertsons spice bottle. Respondents liked symbols and logos and felt that they could identify and recognise brands instantly through their symbols
- Packaging had to be in a convenient format that is easy to use. Respondents cited examples of inconvenient packaging eg. “I hate the Flush Clean toilet sanitisers that come with 2 refill blocks because you have to open up the cage that has been sitting in the toilet for a few weeks, and pop the other block in, that’s disgusting.”
- Respondents loved the format of the Windowlene trigger because the bottle is re-usable. They also liked the Sta-soft refill because they could use it in their cars as an air freshener
- Packaging had to have a good aesthetic feel to it
- Respondents loved promotional gifts eg. the Five Roses tea tins that came with products inside, the Milo mug that is attached to the Milo container of product – although these products do cost a little more, respondents are willing to pay for a more attractive package
- Respondents wanted to be constantly re-excited about the products that they buy, it makes them feel like the manufacturers care about them
- Respondents also felt that the outer packaging needed to be an indication of what the inner product tasted like. Spontaneous mentions of Nestle hot chocolate and Manhattan marshmallows
- Respondents really liked the feel of traditional products like Royal baking powder and felt that a packaging change would do an injustice to the product

because it was a tried and trusted product that has been around forever and reminded them of “the old days”

- Respondents liked blues and reds on packaging because it looked more “eye-catching”

4.4.4 Respondents’ definition of unattractive packaging

The packaging formats and branding that respondents did not like were :

- The packaging of Lion matches – respondents felt that packaging has remained the same for years and they really need to be modernised
- Eggs which come in a very drab outer casing with very little branding or innovative packaging
- Spontaneous mentions were also made of sugar which had a very unappealing packaging but which was a necessity and had to be purchased
- Respondents also felt that that unattractive packaging made them feel that the product was of low quality and “was not good for you”
- Unappealing colours that respondents noticed were green, pink and brown in non-chocolate items

4.2.5 Have respondents noticed when a brand has undergone a packaging revamp? What does it say of the brand?

Respondents in general did pay attention to packaging changes and common examples were the Ego anti-perspirant which changed its name to Axe, Epol dog food which changed its name to Alpo and Clover Danone changing its name to Nutri-day. With these 3 brands in particular, although there was a name change, every other aspect of the packaging remained the same ie. the on-pack colours, size of product and material used in the packaging. Because of this, the brand recognition was still very much there.

When asked whether packaging revamps have an effect on their purchasing decisions 66% of the respondents said no and 34% said yes. The 66% said that interesting packaging always caught their attention and it felt as if “the company that manufactured the brand “cares about them” and wanted to keep them interested in the product. They also felt that the product tasted or performed better and that the company improved upon the quality of the product. The 34% that did not appreciate or value new packaging said that if they always bought a product because of its quality they would not be swayed by a change in packaging because it did not influence the taste or performance.

4.2.6 Would good packaging entice you to buy a product that you would not normally purchase?

All respondents said that good packaging would attract them but only 20% said that it would entice them to buy the product purely based on the packaging. The rest of the respondents, ie 80% said that they would pick up a good packaged product and look at it but if it did not have the correct nutritional information or the proper ingredients needed for it to perform well, they would not buy it. As one respondent quoted, “If I look for a cleaning product, it must have ammonia, if it doesn’t, then no matter how attractive it is, I will not buy because only ammonia removes dirt in the bathroom”

So generally, while respondents would be enticed to pick up a well-packaged product, the rest of it is up to product performance and what it promises it can deliver on.

4.2.7 Do upper income consumers' opinions differ from lower income? Do opinions differ amongst different races?

The general consensus (+95%) among black consumers was that packaging was a very important component and it would entice them to pick up the product, however they were not swayed by packaging alone, more important was the product performance and ingredients that the product contained. Also, the heritage of the product is important ie. "if my mother and grandmother used it, it must be good".

Lower income black consumers preferred the branding of a product to remain constant over time as some consumers are illiterate and cannot differentiate on shelf; they look at the branding, design and colours in order to recognise products. White respondents, especially the upper income group valued good packaging especially if guests were coming over. These respondents were more image-conscious and did not believe in "no- name brands" as it was "embarrassing" to have.

Middle income consumers, all races were much more practical, taking price into account in all buying decisions. Packaging does entice purchase but 30% said that packaging would not sway them at all.

Indian and coloured consumers except for seven, were very conscious of packaging, all income groups said that good packaging indicated that the product was of good quality and worth buying.

4.2.8 Key purchase drivers of product choice

- Money-back guarantees on the back of the package – it assured the consumer that the product was of good value
- Bright packaging, on confectionery products especially
- Respondents liked a bit of see-through material on the package so that they could see the product

-
- Respondents did not like clutter on the package ie. the minimum amount of words were preferred – prefer visuals
 - Ingredients and nutritional information have to be shown in detail on the package of consumables especially consumer goods targeted at children
 - Design and aesthetics of the package – ie materials used
 - Good name brands always instills trust with respondents and consumers don't think too much before purchasing

4.5 Examination of additional questions generated by the study

It was very surprising to note the difference in opinion of what constituted a good FMCG product. This difference in opinion was mostly separated by racial differences more than income differences. This brings us to the question of whether upbringing and the historical nature of that upbringing especially with regard to family relations have to do with respondents' opinions and buying decisions of FMCG products and their perception of the 'goods' and 'bads' of packaging?

Experience also has a lot to do with purchasing choices. If a consumer has had a bad experience, for instance with a well-packaged product which did not perform well on quality. This would make the respondents or consumers wary of all well-packaged products even if they did deliver on quality. So how do manufacturers actually account for this or what can or do they do to go the extra mile to convince consumers that their product is different or won't disappoint on quality? This should almost be a priority and included in any well-executed marketing plan.

It was also surprising to notice that a large percentage of consumers are really interested in biodegradable packaging and the effects of packaging on the environment. Therefore an increasingly large number of consumers are asking "Can the packaging be recycled?" This trend will increase over the years.

CHAPTER FIVE

RESEARCH CONCLUSION AND RECOMMENDATION

5.1 RESEARCH CONCLUSIONS

This research explored 4 objectives :

5.1.1 To examine consumers attitudes towards the packaging of FMCG products

The aim was to gauge respondents' attitudes towards packaging of various FMCG products and to examine the extent to which they recognise it as a separate element that they do pay attention to. According to respondents, they do recognise packaging as a major tool of differentiation between different manufacturers and their products.

They realize that packaging and its different forms and varieties is what differentiates brands of the same products from each other and they are very much aware of its presence. They also recognise, spontaneously, a lot of brands in different advertising mediums eg. magazine advertorials and television and they describe vividly the packaging that they were in. Respondents also remembered if a product was not advertised in a long while.

5.1.2 To examine whether packaging plays a role in consumers purchasing decisions, and if so how important is this role?

The aim was to examine whether packaging had any place in the consumers shopping role and the extent of this role. Generally all respondents said that good packaging would attract them to the product and even entice them to pick it up and examine it, however the majority of respondents said that this packaging would not be enough to persuade them

to buy the product. Once they have picked up the product, it was up to the manufacturer to ensure that the quality of the product was just as good. There was a small percentage that said that good packaging of a product would persuade them to buy the product and after purchasing the product it was then up to the performance of the product which would determine whether they re-purchased it.

5.1.3 To investigate and understand the key attributes that consumers look for in packaging ie. the key elements of good packaging

The aim was to understand what consumers were looking for in a well-packaged product when they entered the store and went about their shopping routine. Basically all respondents from the different racial and income backgrounds agreed on what constituted good packaging. Due to the vast number of consumer products on offer these days in the supermarkets, shelves in these stores have become very cluttered and messy. For this reason the shopping experience is a lot more tiresome.

Respondents said that they were attracted to products that stood out on shelf and did not look like a “me too” product. They wanted to see some sort of differentiation on shelf and wanted products to look and feel good. Bright colours, good visuals and useful information on the packaging are some of the attributes that they were looking for. It made them feel as if the “company that made the products cared about what they thought” Respondents also wanted packaging to be kept simple ie. if they had to glance at a product once, they should know what it was and how to use it.

5.1.4 To determine if packaging needs and wants are specific or unique to certain LSM profiles

The aim was to establish whether there were any differences in opinion of what constituted good packaging amongst the different LSM (Living

Standard Measure) profiles. There was a noted difference between the needs and wants of the different LSM (Living Standard Measure) profiles. Upper income consumers almost expected a well-packaged product and expected manufacturers of these products to be constantly innovating and revamping their packaging. Lower income consumers were much more interested in quality and did not mind paying a little more for a product that would perform better and last longer. Lower income consumers preferred the packaging to remain the same as a good percentage of consumers are illiterate and recognise a product by its' distinctive colours, branding and pictures on the pack.

5.2 RECOMMENDATIONS

In today's fast paced society, the shopping routine has become more of a burden than a good experience for some. It's something that needs to be crammed into the daily or weekly routine and the faster it gets done the better.

This calls for manufacturers to take this into account when making packaging decisions. Consumers want very simplified formats, which are easy, to spot and easy to recognise. At the same time they want differentiation amongst different brands so that they can easily recognise them on shelf so that their purchasing choice is quicker and simpler.

The following is a list of attributes that consumers find appealing in packaging and which could sway them to purchase:

- Distinctive and colourful branding that are easily recognisable
- Detailed nutritional information
- Respondents like to see some products through the pack to eliminate the element of "surprise"
- Products that are easy to use and do not have complicated instructions
- Packaging that might be useful for other reasons eg glass jam bottles that can be re-used for storing other items of food
- Tamper proof seals on packaging especially of harmful products eg. detergents, so that children cannot open easily
- Useful product information eg. recipes on the back of fresh cream tins
- Any type of added value that tells consumers that they are getting "something extra"
- Any type of charitable donation that is made on behalf of the buyer of the product eg. the Dettol trust for Aids victims. Consumers have a good conscience when buying these products and don't mind paying a little extra
- It is an advantage if packaging is biodegradable and environment friendly as well
- Simple and uncomplicated branding and usage instruction

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FOCUS GROUP QUESTIONNAIRE : MOD. GUIDE

Section A

1. Please can you state your name?
 2. Please can you state your age?
 3. Please can you state you gender?
 4. Your area of residence?
 5. What is the highest level of education that you have attained?
 6. Your income group. Please can you tick in the correct box?
Below R20 000 per annum
R20 000 - R100 000 per annum
R100 000 – R150 000 per annum
 - R150 000 – R200 000 per annum
 - R200 000 – R250 000 per annum
 - Above R250 000
5. Do you shop often at this store?

Section B

1. Do you shop for groceries often?
2. What is your favourite packaged perishable/grocery product? Why?
3. What is your worst packaged perishable/grocery product? Why?
4. Does the packaging of products have an influence on your buying choice?
5. What do you look for in good packaging?
6. Have you noticed any repackaging in any brands recently? Which one?
7. Does repackaging negatively or positively influence the image of a product?
8. Are you willing to pay more for a better-packaged product? Why?
9. Does packaging have an influence on the taste or quality of a product?
10. Do you look for the most convenient format in groceries eg. Milk sachets vs boxes/plastic bottles?
11. Does recyclable packaging draw your attention?
12. Does recyclable packaging influence your decision to purchase?

13. Are you inclined to buy products because the packaging is re-usable eg. bottled jam, tins of tea?

Section C :

In this section the researcher took out popular FMCG products to gauge consumer responses. The products were :

- A box of Skip washing powder detergent for clothes
- A can of Doom insecticide spray
- A can of Airoma Air Freshener
- A box of Lipton tea bags
- A bottle of Robertsons spices – Pepper grinder
- A packet of Simba chips – Tomato flavour
- A soap bar – Palmolive Milk and Honey

1. In your opinion, which one of these products do you rate as having the best Packaging? Why?
2. What product has the worst packaging? Why?
3. Any colours in specific that you feel attracted to or that stands out from the rest?
4. Would you buy any of these products because of the packaging?
5. What are the key packaging elements that you admire and detest about all the products?
6. Do the products have enough information on the pack?
7. Do you check to see who the manufacturer is before you buy the product?
Does knowing the manufacturer make you trust the product more?