

# Similar packaging

A summary of consumer research, 1993 - 2005

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# Consumer research into the effects of similar packaging

## INTRODUCTION

Similar “parasitic” packaging relies on provoking a consumer reaction that differs from the reaction to normal distinctive packaging. If it were not successful in provoking this, the practice would have died out very quickly.

Consumer deception takes a number of forms and the research summary below explores each:

- outright confusion – the consumer buys the parasitic copy in mistake for the brand;
- deception over origin – the consumer recognises the parasitic copy is different but believes, due to the similar packaging, that it is made by the same manufacturer; and
- deception over equivalence/quality – again, the consumer recognises the parasitic copy is different but believes, due to the similar packaging, that the quality is the same or closer than they would assume if the packaging were more different.

## OUTRIGHT CONFUSION

A range of studies clearly shows that consumers purchase parasitic copies by mistake:

<b>Date</b>	<b>Research</b>	<b>Base</b>	<b>% buying by mistake</b>
April 1994	NOP, for Mars	1,008	21%.
March 1995	BMRB for Consumers' Assn	-	13% had purchased a parasitic copy by mistake in the previous six months. - 3% had a mistaken purchase in their basket on the day of the research.
February 1997	NOP, for Marketing	996	17%
April 1998	RSL, for Consumers' Assn	2,000	6% bought the copy instead of the brand in the previous six months.  one in three made the mistake once in the last six months. Only slightly less say they had made such mistakes three or more times.

These separate research studies consistently and clearly show that consumers buy the wrong product because of similar packaging. Between 17% and 21% state that they have purchased by mistake at some time. This equates to around 4 - 5 million UK consumers buying products they did not intend to buy, purely as a result of misleading packaging.

In considering these high percentages, it is important to bear in mind that consumers are faced with a vast array of choice in large retail environments. When buying items on a regular basis, they do not spend much time considering their purchases and their attention to any given product line will be brief, typically 4 seconds or less.

## DECEPTION OVER ORIGIN

Similar packaging suggests to consumers that the products in the packaging are made by the same manufacturer. A range of different research studies consistently bears this out:

Date	Research	Base	% buying by mistake
December 1993	Street interviews undertaken for a brand	747	34% believed a parasitic copy was made by the brand manufacturer.
February 1994	Interviews undertaken for a brand	305	41% believed that Nescafé made Sainsbury's coffee, with 73% attributing this to similar packaging.
February 1997	NOP, for Marketing Magazine	996	41% believe brand manufacturers make an own label product if the pack design is similar to the brand.

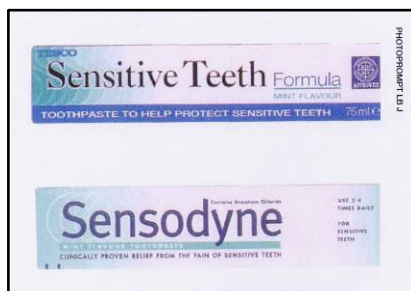
The Consumers' Association researched this question in April 1998 when they asked 2,000 consumers whether the following four products were made by the brand manufacturer:



Definitely made by the same company 6%  
Probably made by the same company 38%



Definitely made by the same company 6%  
Probably made by the same company 36%



Definitely made by the same company 5%  
Probably made by the same company 45%



Definitely made by the same company	7%
Probably made by the same company	45%

RSGB undertook extensive research for the British Brands Group amongst 3,994 individuals also in 1998. The sample was systematically divided into two groups, one group being shown only the packaging of a pair of products, the other group being shown only a written description. The same questions were then put to each group. In this way, the **specific impact of packaging** could be assessed.

For the similar pair, 13% of those shown the word description believed both were made by the same company. This figure **rises** to 32% for those who were shown the packaging.

For the distinctive pair, 21% of those shown the word description believed they were both made by the same company. This figure **declines** to 17% for those shown the packaging.

This research indicates there is an underlying belief amongst consumers that retailers' own label goods are made by a brand manufacturer. Packaging design is capable of increasing this inherent confusion through similarity or decreasing it by being distinctive. This is explored further below and at the end of this summary.

Business Insights in 2005 in its report "Fighting Private Label" drew on extensive consumer research by Europanel amongst nearly 20,000 respondents internationally. It stated that "private label success is facilitated when consumers cannot tell a private label from a manufacturer brand due to similarity in packaging" and showed that, across all categories analysed, similar packaging resulted in a significant 55% increase in own label share compared to own labels in dissimilar packaging.

Europanel analysed this data further to explore any correlation between consumers' belief that brand manufactures make own label products and similar packaging. This was undertaken for 95 categories with 50 respondents per category (i.e. 4,750 respondents in total). The aggregated responses were as follows:

**Belief that own label looks similar**

(5 = strongly agree, 1 = strongly disagree)

5  
4  
3  
2  
1**Belief that own label is made by brand****manufacturer** (5 = strongly agree, 1 = strongly disagree)4.0  
3.5  
3.2  
3.2  
3.2

Europanel concluded that there is a common belief that own label is made by brand manufacturers but packaging similarity significantly heightens this perception

In conclusion, research evidence clearly shows that similar packaging suggests to many consumers that the product is definitely or probably made by the same company. At the lowest level in the research studies above (32%, RSGB), the practice equates to some 7½ million shoppers being misled.

**DECEPTION OVER QUALITY/NATURE**

The similar packaging suggests to consumers that the quality or nature of the parasitic copy is comparable to the quality or nature of the brand or at least is more comparable than they might otherwise assume. This suggests to consumers that price is the key basis for their purchasing decision, rather than a combination of price and quality (that is, value).

A French academic, Kapferer, Professor at HEC Graduate School of Management, explored this subject in May 1995, using a sample size of 127 women. He found a direct correlation between perceptions of manufacture and perceptions of quality:

<b>Brand/Copy</b>	<b>Definitely or probably made by same company</b>	<b>As good as the original</b> (perception only, not trial)
Martini / Fortini	61%	50%
Amora / Mama	67%	44%
Panzani / Padori	80%	77%
Ricoré / Incoré	31%	29%
Ricoré / Calicoré	42%	53%

The Consumers' Association research (1998) provides further insight into the connection between similar packaging and consumers' assumptions about products.

The research tested four similarly packaged pairs of products against a benchmark pair, with respondents being asked whether one of the pairs of products was much better, a little better, or the same as the other in terms of (1) quality and (2) value.

By averaging the results for the four similarly packaged pairs, the ratings were as follows:

<b>Supermarket product same or better for</b>	<b>Quality</b>	<b>Value</b>
Copy (av.)	43%	57%
Benchmark	30%	46%

The findings for value for money are particularly interesting, with the rating for the copy pairs being 24% higher than for the benchmark pair. As shoppers buy for value for money, sales of a product can be reasonably expected to increase by 24% as a result of adopting similar packaging.

### **Perceived manufacturers of own label**

The research above indicates there is an inherent level of confusion in the market about the manufacture of own label products, irrespective of the packaging. The RSGB research puts this at between 13 - 21% (that is, those who believed, without seeing the packaging, that the products came from the same manufacture). This is explained by consumers understanding that supermarkets are retailers not manufacturers and that others make the products for them.

The Business Insights analysis of 2005 described above is also consistent with these findings. The significant point to note, however, is that distinctive packaging reduces this level of inherent confusion while very similar packaging reinforces and increases it.

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