A study into the impact of similar packaging on consumer behaviour

Undertaken for the British Brands Group

9 February, 2009

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Registered In England Number 5422010

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1.0 INTRODUCTION / OBJECTIVES

This research responds to a request by the British Brands Group to update information on consumer perceptions of and attitudes to similarity in packaging between a selection of branded products and their equivalents. It also considers how similar packaging may influence consumer buying behaviour. The last consumer research in this area took place over ten years ago.

It was felt that similar packaging can mislead consumers and undermine brand distinctiveness. This continues to be a problem in a number of European markets. In Brussels, DG Markt is assessing whether to commission a study, while DG Sanco is monitoring the situation in relation to the Unfair Commercial Practices (UCP) Directive. In the UK, evidence is required to inform the authorities, notably the OFT and Trading Standards Service, on whether action under the Consumer Protection Regulations is appropriate. Meanwhile, the Government has undertaken to review its implementation of the UCP Directive in 2010, for which evidence is required to inform future policy. The last major consumer studies were undertaken in 1998, so current market data is now badly needed.

The objectives of the study were:

1. To understand consumer perceptions of similarity in packaging between a selection of branded products and their equivalents;

2. Where packaging is deemed to be similar, to evaluate the effect on consumer perceptions of value, likelihood of purchase and origin of the product;

3. To assess whether similar packaging is likely to influence consumer buying behaviour;

4. To assess any consumer detriment caused by similar packaging.

2.0 SUMMARY OF FINDINGS

Misleading and confusing packaging is clearly an issue that is of concern to grocery shoppers. Moreover, a significant number of shoppers have been affected by misleading packaging in the past – either in being confused or misled by the packaging of two grocery items which look similar, or accidentally buying the wrong item because the packaging design was similar to the item they wanted to buy.

Face to face research

In the face to face market research, conducted amongst a representative sample of 1,199 GB grocery shoppers over the age of 16 between 8th and 14th January, 2009:

- Almost three times as many shoppers agreed (65%) than disagreed (23%) that it can be confusing or misleading when the packaging of two grocery shopping items looks similar.

- Over three times as many shoppers agreed (64%) than disagreed (19%) that it would concern them if the packaging of a grocery item suggested that the item was connected to a long established make or brand when actually it was not.

- 38% of shoppers admit to having been confused or misled by the packaging of two grocery shopping items which look similar. Amongst 16-24 year old grocery shoppers, this % rises to 48%, against 40% who claim that they have not been confused or misled.

- A third of grocery shoppers (33%) admit to having accidentally bought the wrong grocery shopping item because the packaging design was similar to the item they wanted. Over half of the 16-24 year olds (54%) admit to having made such a mistake.

With over 24 million households in the UK, if one third of households buy the wrong product in error because of a similar packaging design, this would result in over 8 million products bought by mistake. As grocery shoppers average over 50 grocery shopping trips per year, the strong likelihood is that this figure is a vast under-estimate of the number of products erroneously purchased due to similar packaging.

Respondents were shown pictures of four products and asked if the grocery item pictured brought to mind any other grocery item. They were not prompted with brand names. For the product You'd Butter Believe It, of those who thought it did remind them of another product, over half (53%) spontaneously mentioned I Can't Believe It's Not Butter, over twice as many as for any other brand.

For Sherry's Active detergent, the corresponding figure was even higher, with 56% of those who thought it reminded them of another brand mentioning Bold. Amongst the 16-24 year olds, this was higher still at 64%.

59% of respondents thought that Sherry's Active reminded them of another grocery item, yet only 9% of them thought the same for Ultima washing powder. This indicates that distinctively packaged products bring to mind familiar brands significantly less than products in similar packaging.

Online research

The online market research was conducted across a 4 week period from 8th January to 1st February, 2009, amongst a sample varying between 920 and 946 GB grocery shoppers per week, representative of adult internet users and main grocery shoppers between the ages of 16 and 64.

Ten branded products were researched. Each branded product was compared with a product deemed to have similar packaging to the brand (the test product), and separately, with a different product in the same product category, but in more distinctive packaging (the control). There was a variety of "control" products, from products perceived to be very distinctive, to those that were just slightly more distinctive than the "parasitic" (test) product.

Same manufacturer

When asked how likely it was that the pair of products was made by the same manufacturer, for 9 out of 10 test products, a much higher % thought the "parasitic" (test) product was made by the same manufacturer as the brand, as thought the control product was made by the branded manufacturer. The exception was for the vinegar products, where 50% thought that the control, Tesco Malt Vinegar, was made by the manufacturer of Sarson's, against 42% who thought Samson (the test product) was made by Sarson's manufacturer.

For 7 of the 10 test products, a higher % thought it likely that the test product was made by the branded manufacturer than thought it unlikely. The highest scores for those who thought it likely that the test product was made by the manufacturer of the brand were for:

1) You'd Butter Believe It (57% thought it was likely to be made by the manufacturer of I Can't Believe It's Not Butter, versus only 27% who thought it unlikely)
2) Luxury Soft tissues (56% thought it likely to be made by the manufacturer of Kleenex, versus 30% who thought it unlikely)
3) Danpak (54% versus 28% on likelihood of being made by the manufacturer of Lurpak), and
4) Sherry's Active (50% versus 30% on likelihood of being made by the manufacturer of Bold.

The oldest age group (55-64s) were more likely than the youngest respondents (16-24s) to think that the two products were made by the same manufacturer in all twenty pairs of products, both the ten pairs with the test product, and the ten including the control.

Degree of similarity

Respondents were asked how similar or different the two products looked. The net score of those who thought they looked very or quite similar minus those who thought they looked different was positive for all ten test products. The biggest net scores were for:

1) Luxury Soft Tissues and Kleenex (net score of +83%)
2) You'd Butter Believe It and I Can't Believe It's Not Butter (+81%)
3) Easily Better and Utterly Butterly (+76%)
4) Danpak and Lurpak (+75%)

Those respondents who thought the products looked similar were asked what it was about them that made them look similar. The most common answer was Colour(s), followed by Shape, Overall Design and Size. Indeed, for all four of the above products, Colour(s) was the most common response (with at least 84% of respondents mentioning Colour(s) as a reason for the similarity). Colour(s) was the most common response for 9 of the 10 test products. However, it was clear that it usually took a number of factors to drive the similar appearance. For example, in addition to Shape, Overall Design and Size, 74% of respondents also mentioned text/font as a reason for the similarity between Utterly Butterly and Easily Better, and 58% mentioned Brand Name for Sarson's and Samson.

Mistaken purchase

Respondents were asked how likely they thought it was that one of the two products shown could be bought by mistake believing it to be the other one. For 9 of the 10 test products, grocery shoppers thought it more likely than unlikely that such an occurrence could happen (the exception being Saint Etienne when shown next to Stella Artois). For all 10 test products, there was a greater likelihood of being bought by mistake than for their corresponding control product.

The net "likely less unlikely" scores were calculated by adding the % of respondents who thought it Very Likely and Quite Likely together and subtracting those who thought it Very Unlikely and Quite Unlikely. The highest net scores were for:

- You'd Butter Believe It and I Can't Believe It's Not Butter (+62%)
- Samson and Sarson's (+62%)
- Easily Better and Utterly Butterly (+54%)
- Luxury Soft and Kleenex (+51%)

Propensity to buy

The test and corresponding control products were given the same price to allow comparisons between likelihood of purchase of these products when displayed next to the branded product.

For 8 of the 10 test (parasitic) products, there was a higher propensity to buy than for the corresponding control product. The two exceptions were Samson (in comparison with the control, similarly packaged Tesco Malt Vinegar), and Jammy Rings (in comparison with Jam Sandwich).

The biggest positive differences in net propensity to buy (the sum of Definitely and Probably Buy, minus the sum of Definitely and Probably Not Buy) between test and control were for:

- Sherry's Active at -7 versus Ultima at -34 (a gap of 27 points)
- Easily Better at +4 versus Buttery Gold at -23 (a gap of 27 points)
- Tesco Moisturising at +44 versus Tesco Deep Cleansing at +28 (a gap of 16 points)
- Danpak at -3 versus Asda Spreadable at -19 (a gap of 16 points)
- You'd Butter Believe It at +2 versus Buttery Gold at -12 (a gap of 14 points)

It does appear that by having the packaging closer to that of a leading branded product, there is a higher propensity to buy that product, thus influencing consumer buying behaviour.

All five test products above have a very high score on similarity to the branded product. They also have a much higher likelihood of being bought by mistake believing it to be the branded product than their corresponding control product. Indeed, of the 5 test products with the biggest difference in likelihood of being bought by mistake compared to their corresponding control product, 4 appear in the above list (the exception being Luxury Soft Tissues versus Large Tissues with a gap of 11 points in net propensity to buy). Clearly other factors will have an impact such as brand strength and brand loyalty, demographic profile, price, etc. However, there is a very strong link between similarity to a branded product and likelihood of purchasing that product.

<u>Conclusions</u>

The research demonstrates not only that similar packaging is a topic that causes concern to grocery shoppers, but that there is currently a serious issue with the packaging of “parasitic” products, clearly designed to resemble the packaging of existing, familiar brands. Where products are similar to existing brands, there is a clear link to shoppers believing that there is a likelihood of the two products having the same manufacturer.

These “parasitic” products are influencing consumer buying behaviour, with many shoppers buying products by mistake believing them to be a different product. There appears to be a stronger likelihood of shoppers buying a product that is in packaging similar to a well-established brand than another product at the same price, which is in more distinctive packaging.

3.0 METHODOLOGY

Research was carried out by BMRB between 8th January and 1st February, 2009, amongst a GB sample representative by age, sex, social grade and region. One study was carried out in a face to face Omnibus survey, whilst the second study was carried out online across 4 separate Omnibus surveys. In both studies, the respondents were main Grocery shoppers aged 16 and over, but whilst there was no upper age limit in the face to face research, the maximum age for the online respondents was 64.

Face to face research

A number of generic statements were made regarding the packaging of grocery products in a face-to-face Omnibus survey to about 1,200 adult main grocery shoppers aged 16+. The respondents were asked to agree or disagree with these statements. The statements are shown below. This face to face survey took place between 8th and 14th January, 2009. The questions were asked to understand shoppers' attitudes to and experience of similar packaging, helping to define any consumer detriment involved.

Face to face statements:

(i) It can be confusing or misleading when the packaging of two grocery shopping items look similar

(ii) I have been confused or misled by the packaging of two grocery shopping items which look similar

(iii) I have accidentally bought the wrong grocery shopping item because the packaging design was similar to the item I wanted

(iv) It would concern me if the packaging of a grocery item suggested that the item is connected to a long established make or brand when actually it is not.

The respondents were then shown four separate photographs of products (shown in Appendix F – page 46), and asked "if the grocery item pictured here brings to mind any other grocery item, then please state which one?".

This question was asked to establish any unprompted similarity to a specific branded product. Two of the four products, Sherry's Active and You'd Butter Believe It, were chosen for perceived similarity to specific branded products (Bold and I Can't Believe It's Not Butter respectively). The other two, Ultima and Buttery Gold, were chosen for being more distinctive products in the same product categories.

On-line research

An on-line research project was carried out between 8th January and 1st February, 2009, amongst adult internet users and main grocery shoppers between the ages of 16 and 64. Ten branded products were researched. Each branded product was compared with a product deemed to have similar packaging to the brand, and separately, with a different product in the same product category, but in more distinctive packaging. Although these more distinctive products were used as a form of control, it should be noted that there was a variety of "control" products, from products perceived to be very distinctive, to those that were just slightly more distinctive than the product deemed to have similar packaging.

Over four waves of research, between 920 and 946 respondents per wave were shown images of five different pairs of products, where one product is the brand, and the second is another product in the same category. Thus, over the four waves, twenty different pairs were researched. In ten of these pairs, the second product was deemed to be in similar packaging to the brand, whilst in the other ten, the second product was in more distinctive packaging as a form of control[1] for comparison. Amongst the five pairs of products, each respondent saw either two or three "parasitic" and two or three "more distinctive" products. No single respondent saw a brand compared with both its parasitic and its more distinctive product. Appendix G (page 47) shows the images of the products being researched.

The prices used in the research for Q5/Q6 were actual retail prices for both the branded product and the parasitic product at some point in 2008. These products were found at the given prices in at least one retailer. The price for the more distinctive (control) product was set at the same price as the parasitic product. In some cases, this involved increasing the price and in others decreasing the price. As highlighted overleaf, in some instances, retailer branding was removed from the control product, especially when it was felt that it may have an impact on likelihood of purchase.

A suitable distinctive product could not be found for Jammie Dodgers in the same size (300g) as the parasitic product (Jammy Rings), so the 150g "control" (Jam Sandwich) was priced at the same relative price to 150g Jammie Dodgers as the 300g Jammy Rings to the 300g Jammie Dodgers.

<u>Research products and pricing</u>

	Branded product	**Parasitic product**	**Control product**
1	Bold £5.00	Sherry's £3.19	Ultima £3.19
2	I Can't Believe It's Not Butter £1.08	You'd Butter Believe It £0.96	Buttery Gold £0.96
3	Red Bull £0.87	Red Thunder £0.25	Emerge £0.25
4	Sarson's £0.67	Samson £0.29	Tesco Malt Vinegar £0.29
5	Lurpak Spreadable £2.41	Danpak Spreadable £1.59	Asda Spreadable £1.59
6	Carex £1.37	Tesco Moisturising £0.71	Tesco Deep Cleansing £0.71
7	Jammie Dodgers 300g - £1.52 150g - £0.98	Jammy Rings 300g - £0.69	Jam Sandwich Cream 150g - £0.45
8	Kleenex £2.19	Luxury Soft £1.09	Large Tissues £1.09
9	Utterly Butterly £1.19	Easily Better £0.85	Buttery Gold £0.85
10	Stella Artois £1.07	Saint Etienne £0.75	Belgian Premium Lager £0.75

[1] The control was mocked up in some instances to reflect the same source / supplier as the "parasitic" product

Changes to "control" products

Where appropriate, to minimise the effect of retailer branding, some changes were made to the original images of the "more distinctive" products. Appendix G (page 47) shows the images that the respondents saw in the on-line research. The changes made to the more distinctive products were:

Product 1. The "Waitrose" branding was removed from the Ultima pack

Product 2. The "Somerfield" branding was replaced with "Asda" branding, to be consistent with the Asda branding of "You'd Butter Believe It"

Product 6. The "Waitrose" branding was replaced with "Tesco" branding, to be consistent with the Tesco Moisturising product.

Product 7. The "Waitrose" branding was removed from the Jam Sandwich Cream.

Product 8. The "Morrison's" branding was removed from the Large Tissues.

Product 9. The "Somerfield" branding was removed from the Buttery Gold.

Questionnaire

Q1. How likely do you think it is that these products are made by the same manufacturer (very likely, quite likely, quite unlikely, very unlikely, don't know)?

Q2. How similar or how different do these two products look from each other? – (very similar, quite similar, quite different, very different)?

Q3. (If very similar or quite similar) What is it about these two products that make them look similar? (please select or state all that apply)

Q4. How likely do you think one of these products could be bought by mistake believing it to be the other one? (very likely, quite likely, neither likely nor unlikely quite unlikely, very unlikely, don't know)?

Q5. We would now like to show you the anticipated cost for each product. How likely would you be to buy product X? (definitely buy, probably buy, possibly buy, probably not buy, definitely not buy)

Q6. How likely would you be to buy product Y? (definitely buy, probably buy, possibly buy, probably not buy, definitely not buy)

4.0 RESEARCH FINDINGS

4.1 Face to face research

The sample was 1,199 GB adults aged 16+ who were the main grocery shopper in their household. The data was weighted to ensure that demographic profiles match those for all adults in Great Britain aged 16+ who are the main shopper in their household.

Note that there may be slight variances in numbers quoted in the data tables due to rounding.

Q1. Level of agreement with statements on grocery packaging

Statement A: It can be confusing or misleading when the packaging of two grocery shopping items looks similar

Statement B: I have been confused or misled by the packaging of two grocery shopping items which look similar

Statement C: I have accidentally bought the wrong grocery shopping item because the packaging design was similar to the item I wanted

Statement D: It would concern me if the packaging of a grocery item suggested that the item is connected to a long established make or brand when actually it is not.

Statement:	A	B	C	D
Strongly agree (%)	20	10	11	29
Agree (%)	44	28	21	36
Neither agree nor disagree(%)	13	11	8	16
Disagree(%)	15	31	33	13
Strongly disagree (%)	7	20	26	7
Aggregate agree (%)	**65**	**38**	**33**	**64**
Aggregate disagree (%)	**23**	**51**	**58**	**19**

Almost two thirds of the respondents agreed that it can be confusing or misleading when the packaging of two grocery shopping items looks similar, with a similar % agreeing that it would concern them if the packaging of a grocery item suggested that the item was connected to a long established make or brand when it was not. Almost three times as many respondents agreed than disagreed that it can be confusing or misleading when the packaging of two grocery shopping items looks similar. Over three times as many people agreed than disagreed that it would concern them if the packaging of a grocery item suggested that the item is connected to a long established make or brand when actually it is not.

38% of main shoppers agreed that they have been confused or misled by the packaging of two grocery shopping items which look similar.

An amazing one third (33%) of the sample admitted that they had bought the wrong product by accident because of the packaging design. With over 24 million households in the UK, if one third of households make only one such mistake a year, this would result in over 8 million products bought by mistake because of the packaging design. As grocery shoppers average over 50 grocery shopping trips per year, the strong likelihood is that this figure is a vast under-estimate of the number of products erroneously purchased due to similar packaging.

There was very little difference in responses for males versus females, although the % agreeing to each statement was slightly higher for females in each case. Responses across age groups were similar for statements A and D, but there was higher level of agreement for both statement B and statement C in the youngest age group.

Statement A: It can be confusing or misleading when the packaging of two grocery shopping items looks similar

	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
Sample	*1199*	*361*	*838*	*83*	*200*	*239*	*208*	*192*	*277*
Agree (%)	65	61	66	67	66	67	60	63	64
Disagree (%)	23	25	22	23	24	22	25	19	22

There were no significant differences in responses across age groups or between the two sexes, with over twice as many agreeing with the statement as disagreeing in each age group and for both sexes.

Statement B: I have been confused or misled by the packaging of two grocery shopping items which look similar

	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
Sample	*1199*	*361*	*838*	*83*	*200*	*239*	*208*	*192*	*277*
Agree (%)	38	36	39	48	40	42	30	43	32
Disagree (%)	51	51	50	40	47	46	58	45	58

38% of respondents agreed that they had been confused or misled by packaging of two grocery items appearing similar. This was significantly higher amongst the youngest age group (48%) than in the oldest age group (32%). An explanation for this could be that the youngest age group are genuinely more likely to be confused, perhaps having had less shopping experience. One alternative explanation could be that older people are more concerned about giving the perception of being easily confused.

Statement C: I have accidentally bought the wrong grocery shopping item because the packaging design was similar to the item I wanted

	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
Sample	*1199*	*361*	*838*	*83*	*200*	*239*	*208*	*192*	*277*
Agree (%)	33	27	35	54	38	39	26	32	23
Disagree (%)	58	62	57	42	53	55	65	59	65

One third of respondents agreed that they had accidentally bought the wrong grocery product because of confusion over packaging design. Again this was highest amongst the youngest age group, the 16-24s, where over half (54%) agreed with the statement. This is a significantly different result to the rest of the population.

Statement D: It would concern me if the packaging of a grocery item suggested that the item is connected to a long established make or brand when actually it is not.

	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
Sample	*1199*	*361*	*838*	*83*	*200*	*239*	*208*	*192*	*277*
Agree (%)	64	62	65	53	65	63	66	68	65
Disagree (%)	19	19	19	23	15	17	23	16	21

Over three times as many people agreed with this statement as disagreed with it, demonstrating a high level of concern if the packaging of a grocery item suggested erroneously that it was connected to a long-established make or brand. The % of people in the youngest age group was lower than in other age groups, but not significantly so.

Q2. If the grocery item pictured here brings to mind any other grocery item, then please state which one?

Respondents were shown photographs of four products (Buttery Gold, You'd Butter Believe It, Sherry's, Ultima – photographs in Appendix F on page 46), and were asked "if the grocery item pictured here brings to mind any other grocery item, then please state which one?". They were not prompted with any brand names.

The oldest age group (the 65+ group) consistently gave higher % responses to "No, it does not remind me of any other product", although for Ultima, there was very little difference across age groups with about 90% saying that the product did not remind them of any other product. The youngest age group gave the highest % response for a specific brand for 3 of the 4 products (the exception being Ultima).

Buttery Gold

Buttery Gold (% responding)	Total	Age 16-24	Age 65+
Sample	*1199*	*83*	*277*
	%	%	%
No, it does not remind me of any other product	47	42	53
Utterly Butterly	26	38	18
I Can't Believe It's Not Butter	5	1	2
Clover	3	2	1
Flora	2	4	3
(St. Ivel) Gold	2	-	1
Don't Know	6	6	9
Other answers	9	7	12

26% of respondents thought that Buttery Gold reminded them of Utterly Butterly – over five times as many as for any other brand. The differences between men and women were minor, but a much higher % (38%) mentioned Utterly Butterly amongst the youngest age group, the 16-24s, than amongst the 65+ age group (only 18%).

641 of the 1199 respondents (53%) thought that Buttery Gold did remind them of another product. Amongst these respondents, almost half (49%) spontaneously mentioned Utterly Butterly. Again this was higher in the 16-24 age group, with two thirds of those mentioning a product (67%) spontaneously giving Utterly Butterly as their answer.

You'd Butter Believe It

You'd Butter Believe It (% responding)	Total	Age 16-24	Age 65+
Sample	*1199*	*83*	*277*
	%	%	%
No, it does not remind me of any other product	38	30	48
I Can't Believe It's Not Butter	33	42	21
Utterly Butterly	16	16	15
Butter (no detail)	2	2	1
Flora	1	-	1
Don't Know	6	6	8
Other answers	4	5	5

One third of all respondents (33%) thought that You'd Butter Believe It brought to mind I Can't Believe It's Not Butter, and a further 16% thought it brought to mind Utterly Butterly. Given that 38% claimed that it did not bring to mind another product, this means that over half of those who mentioned a specific product or brand chose I Can't Believe It's Not Butter.

Again, there were higher mentions amongst the youngest age group, with twice as many in this age group (42%) mentioning I Can't Believe It's Not Butter compared with the 65+ age group (21%). The 48% of the 65+ who thought the product did not remind them of any other product was significantly higher than for the rest of the population.

Ultima

Ultima (% responding)	Total	Men	Women	16-24	65+
Sample	*1199*	*361*	*838*	*83*	*277*
	%	%	%	%	%
No, it does not remind me of any other product	91	88	92	93	94
Ariel	3	3	2	-	1
Shop's Own Brand washing powder / liquid	1	-	1	-	-
Persil	1	0	1	-	0
Bold	1	1	1	1	0
Don't Know	3	4	2	3	3
Other answers	2	3	1	2	0

For Ultima automatic washing powder, over 90% of respondents said "No, it does not remind me of any other product". This indicates that distinctively packaged products bring to mind familiar brands significantly less than products in similar packaging. There were no significant differences across age groups or between the sexes.

Sherry's

Sherry's (% responding)	Total	Men	Women	16-24	65+
Sample	*1199*	*361*	*838*	*83*	*277*
	%	%	%	%	%
No, it does not remind me of any other product	41	44	40	27	61
Bold	33	25	37	47	16
Ariel	10	13	9	12	7
Persil	4	4	4	4	2
Surf	2	2	2	1	-
Daz	1	2	1	2	2
Don't Know	6	6	6	4	10
Other answers	2	3	2	4	3

Sherry's Active quality detergent only had 41% saying that it did not remind them of another product, a much lower % than for the other cleaning product, Ultima. 61% of the 65+ age group claimed that it did not remind them of another product, a significantly higher % than for every other age group.

One third (33%) of total respondents thought that the product reminded them of Bold. Thus, over half of the respondents who thought it reminded them of another product thought that it reminded them of Bold, over three times as many as for any other brand.

The % mentioning Bold was significantly higher for women (37%) than men (25%), and dramatically higher for the youngest age group (47%) versus the oldest age group (16%). Indeed, the % for the 65+ age group (16%) is significantly lower than for every other age group.

4.2 Online research

The sample varied between 920 and 946 GB adults aged 16-64 who were the main grocery shopper in their household. The data was weighted to ensure that demographic profiles match those for all adults in Great Britain aged 16-64 who use the Internet and are the main shopper in the household.

Note that there may be slight variances in numbers quoted between the data tables and commentary due to rounding.

Q1. How likely do you think it is that these products are made by the same manufacturer (very likely, quite likely, quite unlikely, very unlikely, don't know)?

Product comparison	Very Likely %	Quite Likely %	Neither Likely nor Unlikely %	Quite Unlikely %	Very Unlikely %	Likely less Unlikely % *	Don't Know %
Bold vs Sherry's	15	36	17	18	13	**20**	2
Bold vs Ultima	4	13	18	26	33	**-41**	5
I Can't Believe vs You'd Butter Believe	21	37	13	16	11	**30**	2
I Can't Believe vs Buttery Gold	10	29	20	21	16	**1**	3
Red Bull vs Red Thunder	12	31	15	21	18	**4**	3
Red Bull vs Emerge	8	25	18	24	22	**-14**	4
Sarson's vs Samson	13	29	17	24	15	**3**	2
Sarson's vs Tesco Malt Vinegar	18	32	14	18	16	**16**	1
Lurpak vs Danpak	15	39	15	18	10	**26**	3
Lurpak vs Asda	6	20	18	30	25	**-29**	1
Carex vs Tesco Moisturising	12	31	13	20	23	**-1**	2
Carex vs Tesco Deep Cleansing	7	25	15	26	26	**-21**	2
Jammie Dodgers vs Jammy Rings	9	28	15	28	19	**-10**	2
Jammie Dodgers vs Jam Sandwich	7	26	13	27	25	**-19**	2
Kleenex vs Luxury Soft	19	37	13	19	11	**26**	2
Kleenex vs Large Tissues	5	26	19	26	22	**-17**	2
Utterly Butterly vs Easily Better	13	36	18	19	12	**18**	2
Utterly Butterly vs Buttery Gold	6	22	17	32	20	**-24**	3
Stella Artois vs Saint Etienne	5	27	17	28	20	**-16**	3
Stella Artois vs Belgian Premium	3	16	17	27	32	**-41**	4

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** N.B. Likely less Unlikely % is the sum of Very likely and Quite likely, minus the sum of Very unlikely and Quite unlikely*

In general, a much higher % of respondents thought the "parasitic" product was made by the same manufacturer as the brand, as thought the more distinctive (control) product was made by the manufacturer of the brand. The only exception was the two Sarson's comparisons, where 42% of respondents thought that Samson was likely (very likely and quite likely %s added together) to be made by the manufacturer of Sarson's whereas 50% thought that Tesco Malt Vinegar was likely to be made by the manufacturer of Sarson's.

For all but three of the "parasitic" (test) products (Tesco Moisturising, Jammy Rings and Saint Etienne), more people thought that these products were likely to be made by the manufacturer of the brand (Carex, Jammie Dodgers and Stella Artois respectively), than thought it was unlikely.

Adding those saying "quite likely" and "very likely" together, the highest % of those interviewed who thought that a product was likely to be made by the same manufacturer as the branded product included:

- 57% who thought that You'd Butter Believe It was likely to be made by the manufacturer of I Can't Believe It's Not Butter,
- 56% thought that the Luxury Soft tissues were likely to be made by the manufacturer of Kleenex,
- 54% thought Danpak was likely to be made by the manufacturer of Lurpak, and
- 50% thought that Sherry's was likely to be made by the manufacturer of Bold.

The biggest gaps in percentages between those who thought that a product was likely to be made by the same manufacturer as brand and those who thought it was unlikely were for:

- I Can't Believe It's Not Butter and You'd Butter Believe It (gap of 30%)
- Lurpak and Danpak (26%)
- Kleenex and Luxury Soft Tissues (26%)

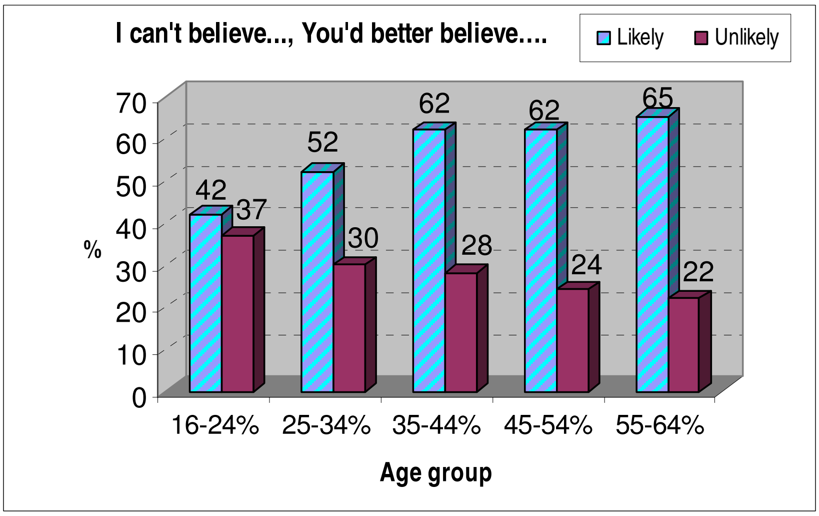
The products the respondents thought least likely to be made by the branded manufacturer were the Belgian Premium Lager and Ultima washing powder, where 59% thought it was unlikely to be made by the manufacturers of Stella Artois and Bold respectively.

The only instances where there were significant differences between male and female respondents were on Red Bull and Red Thunder, Red Bull and Emerge, and Sarson's and Samson. In each of these three instances, there were significantly more women than men who thought that it was likely that the two products were made by the same manufacturer.

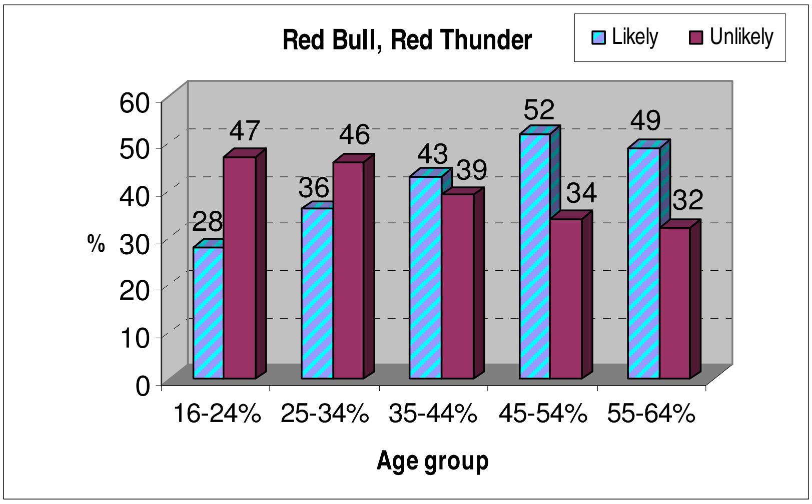
	Male %	**Female%**
Red Bull, Red Thunder		
Likely to be same manufacturer	38	46
Unlikely to be same manufacturer	46	34
Red Bull, Emerge		
Likely to be same manufacturer	28	36
Unlikely to be same manufacturer	51	43
Sarson's, Samson		
Likely to be same manufacturer	37	46
Unlikely to be same manufacturer	42	37

Older respondents were more likely to think that the two products were made by the same manufacturer than younger respondents. In all 20 pairs of products, the % thinking the two products had the same manufacturer was higher for the 55-64 age group than for the 16-24 age group, significantly so in more than half of the cases. For example:

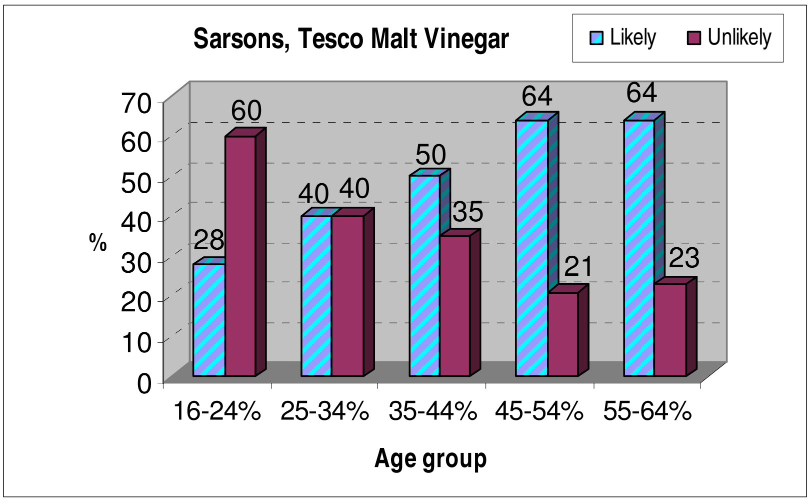
- 65% of the 55-64 age group thought I Can't Believe It's Not Butter has the same manufacturer as You'd Butter Believe it, versus 42% for the 16-24s



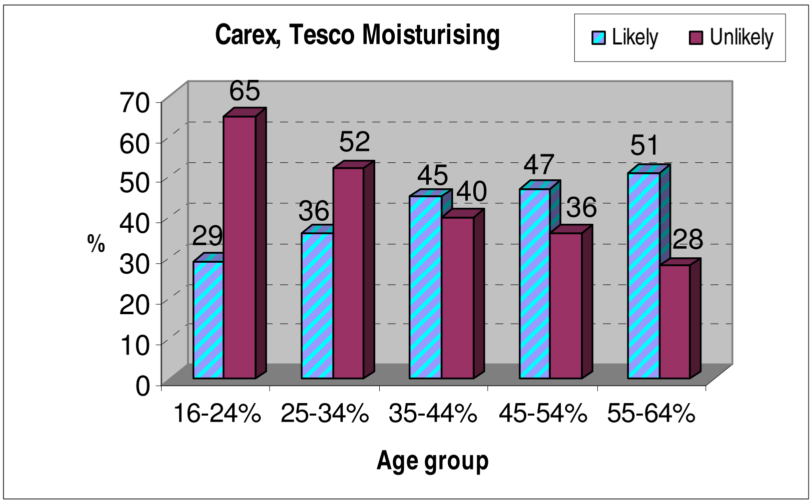
- 49% of the 55-64 group thought Red Bull and Red Thunder had the same manufacturer, versus 28% of the 16-24s



- 64% of the 55-64 group thought Sarson's and Tesco Malt Vinegar had the same manufacturer versus only 28% for the 16-24s



- 51% of the 55-64 group thought Carex and Tesco Moisturising were made by the samre manufacturer versus 29% of the 16-24s.



It's interesting that two of the biggest differences across age groups involve Tesco own label products – Tesco Malt Vinegar (with Sarson's) and Tesco Moisturising (with Carex).

In the malt vinegar category, the age profile of those respondents who thought Sarson's and Samson were likely to have the same manufacturer was very different to the age profile of those who thought that Sarson's and Tesco Malt Vinegar had the same manufacturer.

Likely to be made by the same manufacturer	Sarson's and Samson %	Sarson's and Tesco Malt Vinegar %
Total	42	50
Aged 16-24	39	28
25-34	39	40
35-44	43	50
45-54	42	64
55-64	47	64

There were no significant differences across the age groups for those people who thought that Sarson's and Samson were likely to have the same manufacturer. However, the biggest difference in age profile was for those who thought that Sarson's and Tesco Malt Vinegar were likely to have the same manufacturer. Over twice as many of the 45-54 and 55-64 age groups (64%) thought that Tesco Malt Vinegar was made by the manufacturer of Sarson's as in the 16-24 age group (only 28%).

Clearly, the Tesco Malt Vinegar has strong retailer branding. The results above may reflect that more of the older than the younger people believe that retailer own brands are made by branded manufacturers.

Q2. How similar or how different do these two products look from each other? – very similar, quite similar, quite different, very different?

Product comparison	Very Similar %	Quite Similar %	Quite Different %	Very Different %	Similar less Different % *	Don't Know %
Bold vs Sherry's	32	48	14	6	**60**	1
Bold vs Ultima	1	7	32	60	**-83**	1
I Can't Believe vs You'd Butter Believe	44	46	7	2	**81**	1
I Can't Believe vs Buttery Gold	5	32	39	23	**-25**	1
Red Bull vs Red Thunder	20	49	25	5	**39**	1
Red Bull vs Emerge	5	28	35	31	**-33**	1
Sarson's vs Samson	32	54	11	2	**73**	1
Sarson's vs Tesco Malt Vinegar	23	41	25	10	**29**	1
Lurpak vs Danpak	29	58	9	3	**75**	1
Lurpak vs Asda	6	33	43	17	**-21**	1
Carex vs Tesco Moisturising	26	57	13	3	**67**	1
Carex vs Tesco Deep Cleansing	5	47	33	14	**5**	1
Jammie Dodgers vs Jammy Rings	23	56	15	5	**59**	1
Jammie Dodgers vs Jam Sandwich	5	38	37	19	**-13**	1
Kleenex vs Luxury Soft	40	51	6	2	**83**	1
Kleenex vs Large Tissues	2	13	31	54	**-69**	1
Utterly Butterly vs Easily Better	36	52	9	2	**76**	1
Utterly Butterly vs Buttery Gold	5	35	41	17	**-19**	1
Stella Artois vs Saint Etienne	8	46	30	15	**9**	1
Stella Artois vs Belgian Premium	1	11	41	46	**-75**	1

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** N.B. Similar less Different % is the sum of Very similar and Quite similar, minus the sum of Very different and Quite different*

The "Similar less Different" column in the table shows the net result of the % of respondents who thought the two products were very or quite similar less those who thought they were very or quite different. All ten of the test products had a net score greater than zero. The lowest score for the test products was for Saint Etienne when showed next to Stella Artois, where there were 9% more respondents who thought the products similar than different. All of the other net scores for test products were greater than 50% with the exception of Red Thunder rated against Red Bull, where 39% more people thought the products similar than different. The highest net scores, highlighting those products most similar were:

- Kleenex and Luxury Soft (net score of 83%)
- I Can't Believe It's Not Butter and You'd Butter Believe It (81%)
- Utterly Butterly and Easily Better (76%)
- Lurpak and Danpak (75%)

Indeed over 90% of respondents thought that Kleenex and Luxury Soft were similar, and thought that I Can't Believe It's Not Butter and You'd Butter Believe It were similar.

The only two of the more distinctive (control) products where more respondents thought the product was similar to the branded product than different were Tesco Malt Vinegar, where a net 29% more respondents thought it similar than different to Sarson's, and Carex, with a net score of +5% against Tesco Deep Cleansing. However, both of these scores are much lower than for the test product and brand in the same product category - Samson and Sarson's (+73%) and Carex and Tesco Moisturising (+67%).

The most distinctive products of those researched when compared with the branded product were Ultima washing powder (with a net score of -83%) and Belgian Premium Lager (-75%)

Adding together the very and quite similar scores, in seven of the ten categories (the exceptions being the vinegar, jam biscuit and hand-wash products), over twice as many respondents thought that the test product was similar to the brand as thought the control was similar to the brand.

The only two pairs of products where the 55-64 age group score was significantly higher than for the 16-24 age group were for I Can't Believe It's Not Butter and You'd Butter Believe It, and Red Bull and Red Thunder. In the former case, 93% in the older group thought they were similar and 82% in the younger group. For the two energy drinks, 75% of the older group thought they were similar, versus 57% in the younger group.

However, conversely, there was a significant difference the other way for Utterly Butterly and Easily Better, and for Stella Artois and Saint Etienne. For the spreads, 92% of 16-24s found the products similar, versus 80% in the 55-64 age group. For the premium Belgian lagers, 72% of the youngest age group found the products similar, versus 33% of the 55-64s.

Q3. (If very similar or quite similar) What is it about these two products that make them look similar? (please select or state all that apply)

Note that the sample sizes here are different by product comparison, as the only people to answer this question were those who thought that the products were very similar or quite similar in answer to the previous question.

Product comparison		Brand name %	Shape %	Size %	Colour(s) %	Text / Font %	Pictures/ Images/ Photos %	Logo %	Overall Design %	Other %	Don't Know %
	Sample										
Bold vs Sherry's	*753*	5	26	9	87	51	48	66	69	1	0
Bold vs Ultima	*74*	6	31	24	45	26	14	15	28	6	6
I Can't Believe vs You'd Butter Believe	*853*	37	71	65	87	48	40	43	74	1	0
I Can't Believe vs Buttery Gold	*349*	24	66	55	41	25	15	15	44	3	0
Red Bull vs Red Thunder	*656*	34	70	70	88	19	22	17	60	1	0
Red Bull vs Emerge	*309*	3	71	66	25	13	11	6	53	3	0
Sarson's vs Samson	*812*	58	73	70	70	21	19	26	62	2	0
Sarson's vs Tesco Malt Vinegar	*609*	3	82	74	76	7	10	5	52	3	0
Lurpak vs Danpak	*820*	37	58	41	84	25	26	16	68	2	0
Lurpak vs Asda	*367*	7	52	31	78	15	12	10	44	3	0
Carex vs Tesco Moisturising	*770*	2	57	70	90	6	27	15	63	1	0
Carex vs Tesco Deep Cleansing	*480*	1	45	48	86	6	8	2	44	2	0
Jammie Dodgers vs Jammy Rings	*731*	23	62	62	84	33	53	20	69	1	0
Jammie Dodgers vs Jam Sandwich	*399*	3	51	23	80	3	41	5	33	2	0
Kleenex vs Luxury Soft	*839*	2	66	65	87	12	48	14	75	1	0
Kleenex vs Large Tissues	*138*	5	74	70	5	7	13	11	35	7	1
Utterly Butterly vs Easily Better	*806*	32	19	30	87	74	25	44	60	1	0
Utterly Butterly vs Buttery Gold	*372*	34	13	16	80	43	16	24	44	2	0
Stella Artois vs Saint Etienne	*495*	23	33	7	80	36	30	33	62	1	1
Stella Artois vs Belgian Premium	*111*	8	28	8	55	17	15	22	44	7	3

There were a wide range of responses on what makes products similar. However, the four most common reasons Colour(s), Shape, Overall Design and Size.

Colour(s) was the most common answer for 15 of the 20 comparisons (including for 9 of the 10 test products), whilst Shape was the most common answer in the other 5 comparisons.

However, it is clear that in most cases, it is a combination of a number of different factors that drives the similarity between the two products. For example, 74% of respondents mentioned text/font as a reason for the similarity between Utterly Butterly and Easily Better, and 58% mentioned Brand Name for Sarson's and Samson.

Even though this question was only asked of those people who thought that the two products shown were similar, there were generally higher numbers of responses given for the brand and test product than for the brand and control.

The Brand Name was given as a reason for the products being similar by a smaller % than might have been expected. For example, only 58% gave Brand Name as a reason for Sarson's and Samson being similar amongst those respondents who thought the products similar, only 37% for Lurpak and Danpak, and only 37% for "I Can't Believe It's Not Butter" and "You'd Butter Believe It". These were the highest instances of Brand Name being mentioned as a reason, but in each of these comparisons, Colour(s), Shape, Overall Design and Size all had more mentions than Brand Name.

The highest % mentions of Colour(s) were for:

- Carex and Tesco Moisturising (90%)
- Red Bull and Red Thunder (88%)
- Kleenex and Luxury Soft (87%)
- Bold and Sherry's Active (87%)
- I Can't Believe It's Not Butter and You'd Butter Believe It (87%)
- Utterly Butterly and Easily Better (87%)

The highest % mentions of Shape were for the two vinegar category comparisons, Sarson's with Tesco's Malt Vinegar (82%) and Sarson's with Samson (73%), and for Kleenex with Large Tissues (74%).

The highest % mentions for Overall Design were for Kleenex and Luxury Soft (75%) and I Can't Believe It's Not Butter and You'd Butter Believe It (74%), although in both of these instances, Colour(s) was a more frequent answer.

Females gave higher mentions of Colour(s) as a reason for products being similar than males in all but one of the twenty product comparisons. Indeed, the % mentions of Colour(s) by females was significantly higher than for males with over half of the product comparisons (13 of the 20 product pairs). The biggest differences were for:

- Stella Artois and Belgian Premium Lager (64% of females mentioning Colour(s) versus 42% of males),
- Sarson's and Samson (77% female, 59% male),
- Lurpak and Danpak (89% female, 76% male)
- Stella Artois and Saint Etienne (85% female, 72% male),
- Jammie Dodgers and Jam Sandwich (85% female, 72% male).

No other significant differences stood out across age groups and between sexes.

Q4. How likely do you think one of these products could be bought by mistake believing it to be the other one? (very likely, quite likely, neither likely nor unlikely, quite unlikely, very unlikely, don't know)?

Product comparison	Very Likely %	Quite Likely %	Neither Likely nor Unlikely %	Quite Unlikely %	Very Unlikely %	Likely less Unlikely %	Don't Know %
Bold vs Sherry's	15	34	17	21	12	**16**	1
Bold vs Ultima	1	2	4	19	74	**-90**	1
I Can't Believe vs You'd Butter Believe	31	43	11	8	5	**62**	1
I Can't Believe vs Buttery Gold	3	12	12	37	36	**-58**	1
Red Bull vs Red Thunder	12	30	17	27	13	**4**	1
Red Bull vs Emerge	2	6	8	31	51	**-73**	1
Sarson's vs Samson	29	47	10	10	4	**62**	1
Sarson's vs Tesco Malt Vinegar	10	23	16	29	21	**-17**	1
Lurpak vs Danpak	17	43	18	15	7	**38**	1
Lurpak vs Asda	4	11	13	36	36	**-57**	1
Carex vs Tesco Moisturising	12	33	17	27	10	**8**	1
Carex vs Tesco Deep Cleansing	2	13	17	37	31	**-54**	1
Jammie Dodgers vs Jammy Rings	21	42	14	16	7	**40**	1
Jammie Dodgers vs Jam Sandwich	3	15	13	37	32	**-52**	1
Kleenex vs Luxury Soft	26	42	14	13	4	**51**	1
Kleenex vs Large Tissues	1	2	5	19	73	**-88**	1
Utterly Butterly vs Easily Better	23	48	10	12	6	**54**	1
Utterly Butterly vs Buttery Gold	4	18	13	36	30	**-44**	1
Stella Artois vs Saint Etienne	3	14	17	33	31	**-47**	2
Stella Artois vs Belgian Premium	1	3	5	29	62	**-88**	1

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** N.B. Likely less Unlikely % is the sum of Very likely and Quite likely, minus the sum of Very unlikely and Quite unlikely*

Much higher %s thought it was likely that one of the test product or brand could be bought by mistake instead of the other one, than for the control product or the brand. For example, 49% thought it was likely that one of Bold and Sherry's could be bought by mistake, versus only 3% who thought there might be similar confusion between Bold and Ultima.

Indeed, for all but one of the test products (Saint Etienne), more people thought that it was likely that the test product or brand could be bought by mistake than thought it unlikely. In the case of Saint Etienne, the picture shown to respondents clearly shows Saint Etienne to be a different size (500ml) to Stella Artois (440ml), which may be one of the reasons that respondents thought the products unlikely to be mixed up. Of course, in most instances, the two products would not be positioned next to each other on a supermarket shelf.

Conversely, for every single control product, less people thought it was likely that the control product or brand could be bought by mistake than thought it unlikely.

The highest %s for product pairs where respondents thought it likely (very likely or quite likely added together) that one of the products could be bought by mistake believing it to be the other were for:

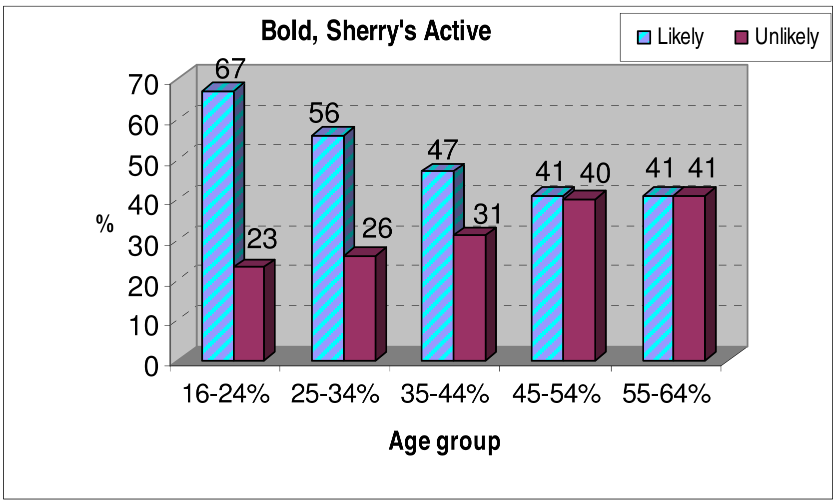
- Sarson's and Samson (76%)
- I Can't Believe It's Not Butter and You'd Butter Believe It (75%)
- Utterly Butterly and Easily Better (71%)
- Kleenex and Luxury Soft (68%)
- Jammie Dodgers and Jammy Rings (63%)
- Lurpak and Danpak (60%)

The corresponding lowest %s for products likely to be bought by mistake believing it to be the other were for:

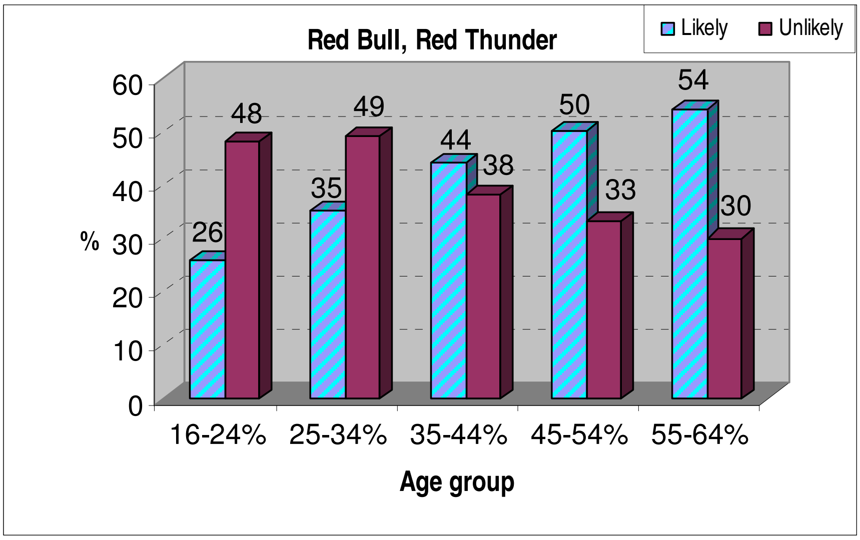
- Bold and Ultima (3%)
- Stella Artois and Belgian Premium Lager (3%)
- Kleenex and Large Tissues (3%)
- Red Bull and Emerge (9%)

There were differences in responses across the age groups and between the sexes, but these differences were not consistently in one direction. It is likely that these differences are influenced by the demographic profile of buyers of the individual categories and products, and the frequency of purchase.

For example, there were two pairs of products where the 16-24s gave significantly higher responses for the likelihood of a product being bought by mistake believing it to be another than the 55-64s – Bold and Sherry's Active, and Utterly Butterly and Easily Better. The more marked of the two was the former:



Conversely, there were two pairs of products where the 16-24s gave significantly lower responses for the likelihood of a product being bought by mistake believing it to be another than the 55-64s – Red Bull and Red Thunder, and Jammie Dodgers and Jammy Rings. The bigger differences were with the pair of energy drinks, Red Bull and Red Thunder:



It may be that Bold and Sherry's Active have an older age profile, which is why younger shoppers feel that it is more likely that one of these products could be bought erroneously believing it to be the other, whilst energy drinks such as Red Bull and Red Thunder have a younger profile, suggesting that younger people think it less likely that a similar mistake could be made in this category.

The biggest (significant) differences in response between men and women occurred in the pairs Red Bull and Red Thunder, Sarson's and Tesco Malt Vinegar and Sarson's and Samson. In all three of these pairs, women gave significantly higher scores than men for the likelihood of buying of one product by mistake, believing it to be the other.

	Male %	**Female%**
Red Bull, Red Thunder		
Likely to be bought by mistake	37	47
Unlikely to be bought by mistake	46	35
Sarson's, Tesco Malt Vinegar		
Likely to be bought by mistake	27	37
Unlikely to be bought by mistake	53	48
Sarson's, Samson		
Likely to be bought by mistake	72	79
Unlikely to be bought by mistake	15	12

It is interesting that the only instances in Q1 of the survey where there were significant differences between male and female respondents on the likelihood of both products in the pair being made by the same manufacturer were also in the vinegar and energy drink categories - for Red Bull and Red Thunder, Red Bull and Emerge, and Sarson's and

Samson. Similar to Q4, there were significantly more women than men who thought that it was likely that the two products were made by the same manufacturer. As with the differences by age group, it is likely that these differences are influenced by the demographic profile of the category buyers and the frequency of purchase.

Q5. We would now like to show you the anticipated cost for each product. How likely would you be to buy product X? (definitely buy, probably buy, possibly buy, probably not buy, definitely not buy)

The parasitic (test) and more distinctively packaged (control) product are the same price in each product group. The branded product is the same price when shown next to the test product as when it is next to the control, with one exception. A suitable distinctive product could not be found for Jammie Dodgers in the same size (300g) as the parasitic product (Jammy Rings), so the 150g "control" (Jam Sandwich) was priced at the same relative price to 150g Jammie Dodgers as the 300g Jammy Rings to the 300g Jammie Dodgers.

Likelihood of buying **Product X** at given price, shown next to Product Y at given price		Def. Buy %	Prob. Buy %	Poss. Buy %	Prob. Not Buy %	Def. Not Buy %	Don't Know %
Product X	Product Y						
Bold at £5.00	Sherry's at £3.19	7	13	29	28	21	2
Bold at £5.00	Ultima at £3.19	9	18	26	25	20	2
I Can't Believe (£1.08)	You'd Butter Believe (£0.96)	12	24	36	15	13	1
I Can't Believe (£1.08)	Buttery Gold (£0.96)	10	23	33	19	13	1
Red Bull (£0.87)	Red Thunder (£0.25)	8	12	22	23	34	1
Red Bull (£0.87)	Emerge (£0.25)	8	14	19	24	34	1
Sarson's (£0.67)	Samson (£0.29)	12	21	36	21	10	1
Sarson's (£0.67)	Tesco Vinegar (£0.29)	11	14	33	26	15	1
Lurpak (£2.41)	Danpak (£1.59)	8	15	24	31	22	1
Lurpak (£2.41)	Asda Spreadable (£1.59)	11	14	25	28	21	1
Carex (£1.37)	Tesco Moisturising (£0.71)	7	16	37	28	11	1
Carex (£1.37)	Tesco Deep Cleansing (£0.71)	8	18	33	26	15	1
Jammie Dodgers 300g (£1.52)	Jammy Rings 300g (£0.69)	7	16	26	32	18	2
Jammie Dodgers 150g (£0.98)	Jam Sandwich 150g (£0.45)	9	18	31	25	16	1
Kleenex (£2.19)	Luxury Soft (£1.09)	6	10	23	37	23	1
Kleenex (£2.19)	Large Tissues (£1.09)	5	8	19	33	34	1
Utterly Butterly (£1.19)	Easily Better (£0.85)	9	21	36	19	13	1
Utterly Butterly (£1.19)	Buttery Gold (£0.85)	11	25	35	18	11	1
Stella Artois (£1.07)	Saint Etienne (£0.75)	12	21	25	16	24	3
Stella Artois (£1.07)	Belgian Premium (£0.75)	15	19	25	14	24	2

The likelihood of buying the branded product at its set price does not appear to differ a lot when compared with the test product or the control product.

With seven of the brands, there are higher scores for definitely + probably buy when displayed next to the parasitic (test) product, while with the other three brands, there are higher scores on likelihood of buying when next to the more distinctive (control) product.

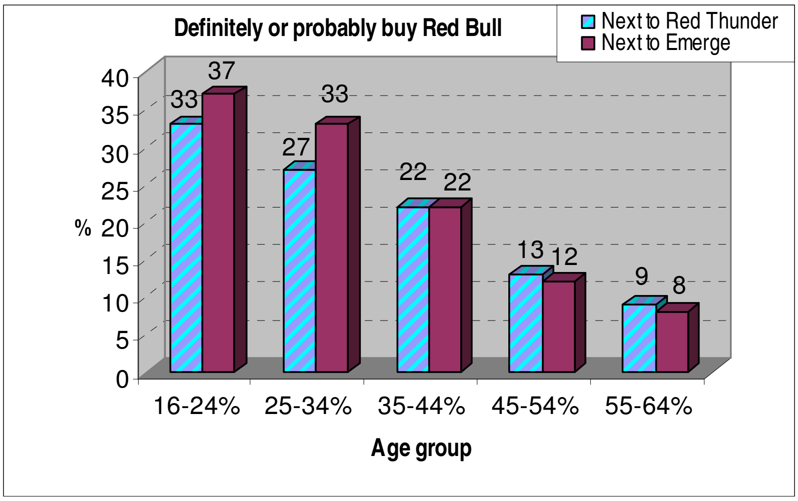
The biggest difference is with Bold, where 19% will definitely or probably buy it, when shown next to Sherry's, and 27% will definitely or probably buy it when shown next to Ultima.

There is also a gap with Utterly Butterly, where fewer people say they will definitely or probably buy it when next to the parasitic product, Easily Better (30%) than when next to the more distinctive product, Buttery Gold (35%).

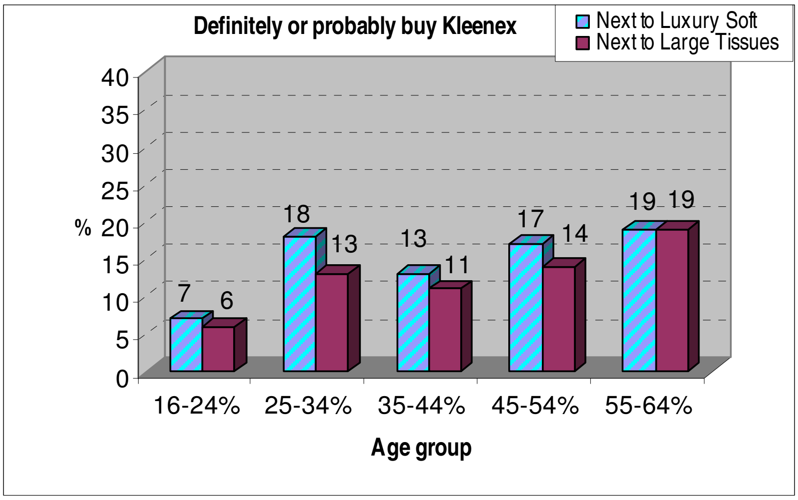
The biggest gap in the other direction is in the vinegar category. There is a higher probability of Sarson's being bought (32% definitely or probably buy) when shown next to Samson, as opposed to being shown next to Tesco Malt Vinegar (25%) – maybe this reflects the perceived strength of the Tesco own label branding.

There were few significant differences in the likelihood of purchase between the sexes. Younger respondents tended to have a higher likelihood of buying, but this varied by product category.

For example, Red Bull had a significantly higher likelihood of purchase amongst younger respondents, whether shown next to Red Thunder or Emerge.



However, Kleenex had a significantly higher likelihood of purchase in the oldest group compared with the youngest group, as shown in the graph below.



Q6. How likely would you be to buy product Y? (definitely buy, probably buy, possibly buy, probably not buy, definitely not buy)

The parasitic (test) and more distinctively packaged (control) product are the same price in each product group. The branded product is the same price when shown next to the test product as when it is next to the control, with one exception. A suitable distinctive product could not be found for Jammie Dodgers in the same size (300g) as the parasitic product (Jammy Rings), so the 150g "control" (Jam Sandwich) was priced at the same relative price to Jammie Dodgers as the 300g Jammy Rings to the 300g Jammie Dodgers.

Likelihood of buying **Product Y** at given price, shown next to Product X at given price		Def. Buy %	Prob. Buy %	Poss. Buy %	Prob. Not Buy %	Def. Not Buy %	Net Buy Less Not Buy % *	Don't Know %
Product X	**Product Y**							
Bold at £5.00	**Sherry's at £3.19**	6	22	35	20	15	**-7**	2
Bold at £5.00	**Ultima at £3.19**	4	14	30	29	22	**-34**	2
I Can't Believe (£1.08)	**You'd Butter Believe (£0.96)**	9	24	35	17	14	**2**	1
I Can't Believe (£1.08)	**Buttery Gold (£0.96)**	5	19	38	22	14	**-12**	2
Red Bull (£0.87)	**Red Thunder (£0.25)**	13	15	22	18	31	**-21**	2
Red Bull (£0.87)	**Emerge (£0.25)**	8	14	23	23	32	**-33**	2
Sarson's (£0.67)	**Samson (£0.29)**	21	32	27	12	7	**34**	1
Sarson's (£0.67)	**Tesco Vinegar (£0.29)**	30	38	19	6	7	**56**	1
Lurpak (£2.41)	**Danpak (£1.59)**	8	24	33	22	12	**-3**	1
Lurpak (£2.41)	**Asda Spreadable (£1.59)**	6	19	30	25	18	**-19**	1
Carex (£1.37)	**Tesco Moisturising (£0.71)**	19	38	29	7	5	**44**	1
Carex (£1.37)	**Tesco Deep Cleansing (£0.71)**	14	32	35	13	5	**28**	1
Jammie Dodgers 300g (£1.52)	**Jammy Rings 300g (£0.69)**	10	24	30	21	13	**0**	2
Jammie Dodgers 150g (£0.98)	**Jam Sandwich 150g (£0.45)**	11	26	33	18	10	**9**	2
Kleenex (£2.19)	**Luxury Soft (£1.09)**	15	37	33	10	3	**39**	1
Kleenex (£2.19)	**Large Tissues (£1.09)**	14	31	36	12	6	**28**	1
Utterly Butterly (£1.19)	**Easily Better (£0.85)**	9	26	33	18	13	**4**	2
Utterly Butterly (£1.19)	**Buttery Gold (£0.85)**	5	16	32	29	16	**-23**	1
Stella Artois (£1.07)	**Saint Etienne (£0.75)**	5	9	23	29	31	**-36**	2
Stella Artois (£1.07)	**Belgian Premium (£0.75)**	3	8	24	30	30	**-49**	3

** N.B. "Net Buy Less Not Buy % " is the sum of Definitely and Probably Buy, minus the sum of Definitely and Probably Not Buy*

In all but two cases, there is a higher likelihood of buying the test product than the control product. For example 28% claim that they will definitely or probably buy Sherry's versus only 19% for Ultima. Thus, by having packaging closer to the established branded product, the product appears to be more likely to be purchased.

The biggest exception is for the test product Samson, where 53% claim that they will definitely or probably buy it, versus a higher 68% for the control product Tesco Malt Vinegar. This may partly reflect the strength of the Tesco branding. It may also reflect that of all 10 control products, Tesco Malt Vinegar is the product with the highest % of respondents thinking that it is likely to be manufactured by the same manufacturer as the brand Sarson's (49%), and the highest % thinking that it is very or quite similar to the brand (64%).

Indeed, Tesco Malt Vinegar is the only control product where a higher % thought it likely to be manufactured by the branded manufacturer than the % thinking that the test product (Samson) was likely to be manufactured by the branded manufacturer. There appears to be a positive link between thinking that a product is likely to be made by the manufacturer of an established brand, and the likelihood of buying that product (particularly as the test and control products in each instance in our research are priced lower than the brand).

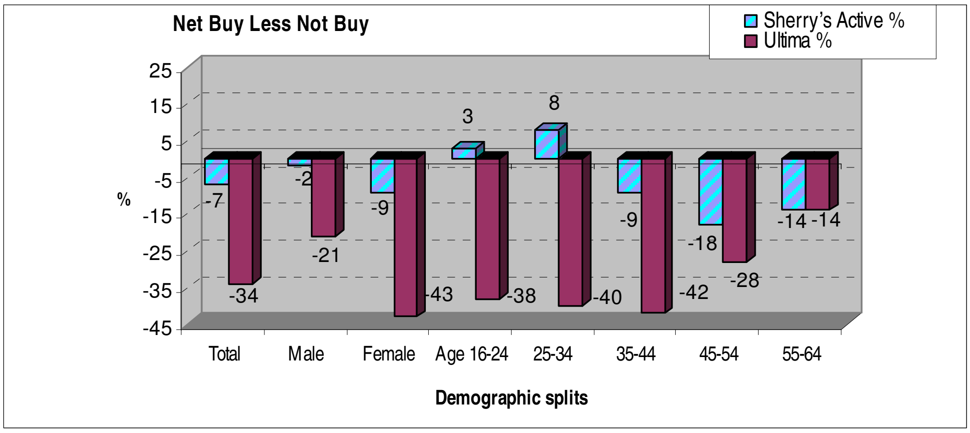
The other exception was for the jam biscuit category, where 34% claimed that they would definitely or probably buy the test product, Jammy Rings versus 37% for the more distinctive Jam Sandwich. However, this was the only product category where the portion sizes varied between the test and control. Jammy Rings is in a 300g box, whereas Jam Sandwich is 150g. Although care was taken to ensure that the relative price of both products to the brand, Jammie Dodgers, was the same, the smaller portion size of Jam Sandwich may have had an effect on the likelihood of purchase.

The "Net Buy Less Not Buy" column in the table shows the difference between those respondents who claim they would probably or definitely buy the product and those who would probably or definitely not buy the product. The biggest differences are for Sherry's Active and Ultima, and for Easily Better and Buttery Gold. In both cases the net score was 27% higher for the test product than the control product.

Similar to Q5, there are differences by age and sex in likelihood of purchase. For example, both of the energy drinks, Red Thunder and Emerge, had significantly higher likelihood of purchase in the youngest age group versus the oldest age group.

It is interesting to consider what drives the big differences in the "Net Buy Less Not Buy" column between test and control products. In the case of the washing powders, with a 27% difference in net scores between Sherry's and Ultima, this is driven by the younger age groups, and slightly more by women than men.

Net Buy Less Not Buy	Sherry's Active %	Ultima %
Total	-7	-34
Male	-2	-21
Female	-9	-43
Age 16-24	3	-38
25-34	8	-40
35-44	-9	-42
45-54	-18	-28
55-64	-14	-14

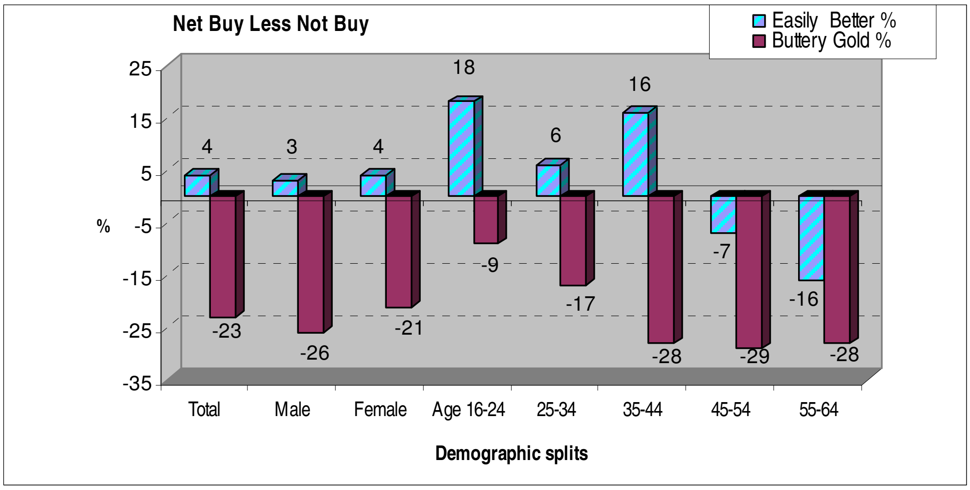


The net scores themselves are less important than the differences between the net scores for the two products. For example, the 55-64s net score for Sherry's is -14. This means that there are 14% more of this age group who claim that they will probably or definitely not buy Sherry's than will probably or definitely buy it. This is the same net score as the 55-64s for Ultima. So, their likelihood of buying Ultima or Sherry's are similar.

However, the net scores for the 16-24 and 25-34 age groups are very different for the two products (41% higher and 48% higher respectively for Sherry's Active).

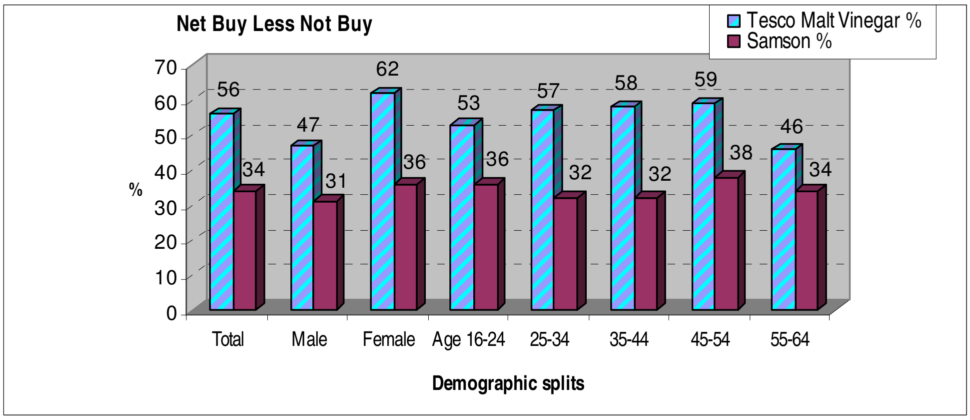
When Easily Better and Buttery Gold are shown next to Utterly Butterly (below), there are big differences in the net score between the two products for both men and women. Similarly, there are reasonably big differences across all of the age groups, with the biggest difference in the 35-44 age group. Here, for Easily Better, there are 16% more respondents who claim that they will definitely or probably buy the product compared with those who will definitely or probably not buy it. However, for Buttery Gold, at the same price, there are 28% more who claim they will definitely or probably not buy versus those who claim they will buy, a 44% shift in purchase intentions.

Net Buy Less Not Buy	Easily Better %	Buttery Gold %
Total	4	-23
Male	3	-26
Female	4	-21
Age 16-24	18	-9
25-34	6	-17
35-44	16	-28
45-54	-7	-29
55-64	-16	-28



For the two malt vinegar products (see below), both sexes and all age groups show a bigger net score for likelihood of buying Tesco Malt Vinegar than Samson, but it's more marked amongst women than men, and in the 25-34 and 35-44 age groups.

Net Buy Less Not Buy	Tesco Malt Vinegar %	Samson %
Total	56	34
Male	47	31
Female	62	36
Age 16-24	53	36
25-34	57	32
35-44	58	32
45-54	59	38
55-64	46	34



Thus, the difference in claimed likelihood of buying the test and control products is not driven in a consistent way by one particular age group, or one of the sexes. The demographic profile of the category and the products, and almost certainly many other factors too, will influence the likelihood of buying specific products.

However, it does seem clear that in the majority of cases, the closer the product looks to the established brand, the higher the likelihood of consumers buying it.

5.0 CONCLUSIONS

The research shows not only that consumers have strong opinions on the similarity of packaging of grocery products, but that many of these concerns are being realised by products currently for sale, which look similar to existing brands.

Almost three times as many main grocery shoppers agreed (65%) than disagreed (23%) that it can be confusing or misleading when the packaging of two grocery shopping items looks similar. For the specific products shown in the online research, at least two thirds of the respondents thought that nine of the ten test products were very similar or quite similar to the corresponding branded product. This similarity is driven by a number of factors, colour(s) being the most mentioned reason in most instances, but with shape, size, overall design, brand name, text/font, logo, and pictures/images/photos also getting high mentions for many of the products.

Well over three times as many shoppers agreed (64%) than disagreed (19%) that it would concern them if the packaging of a grocery item suggested that the item was connected to a long-established make or brand when actually it is not. In the online research, more respondents thought that 7 of the 10 test products were likely to be manufactured by the branded manufacturer than thought it unlikely, with particularly high scores amongst the oldest respondents (55-64 year olds). It is clear that the similarity of the packaging is driving this misconception.

A third of main grocery shoppers (33%) admit to having accidentally bought the wrong grocery shopping item by mistake because the packaging was similar to the item they wanted, rising to over half (54%) of the 16-24 year olds. More respondents thought it likely than unlikely that 9 of the 10 test products could be bought by mistake believing it to be a different product. Indeed, for 6 of the test products, over 60% of main grocery shoppers thought it very likely or quite likely that it could be bought by mistake.

These figures show not only that similar packaging is a topic that causes concern to main grocery shoppers, but that there is currently a serious issue with the packaging of "parasitic" products, clearly designed to resemble the packaging of existing, well-established brands. Where products are similar to existing brands, there is a clear link to shoppers believing that there is a likelihood of the two products having the same manufacturer.

"Parasitic" products are influencing consumer buying behaviour, with many shoppers buying products by mistake believing them to be a different product. There appears to be a stronger likelihood of shoppers buying a product that is in similar packaging to a well-established brand than another product at the same price, which is in more distinctive packaging.

Appendix A - Face to face questionnaire

I would now like you to think about when you go shopping for grocery items, in particular when shopping for goods where the packaging of different brands is similar in colouring, lettering, package design etc. Grocery items include food items, cleaning products, and toiletries.

So now while thinking about these items, please state how much you agree or disagree with each of the following statements. So, firstly...

---

1. ...

This question is repeated for the following loop values:

- It can be confusing or misleading when the packaging of two grocery shopping items look similar
- I have been confused or misled by the packaging of two grocery shopping items which look similar
- I have accidentally bought the wrong grocery shopping item because the packaging design was similar to the item I wanted
- It would concern me if the packaging of a grocery item suggested that the item is connected to a long established make or brand when actually it is not.

---

2. If the grocery item pictured here brings to mind any other grocery item, then please state in which one?

Appendix B - Online questionnaire

And now we would like you to focus your attention on the following photos and answer the following questions about the packaging of grocery items such as food, drink, cleaning products and toiletries.

1. How likely do you think it is that these products are made by the same manufacturer?

2. How similar or how different do these two products look from each other.

IF 2 = Very Similar OR 2 = Quite Similar
THEN ASK: 3

3. What is it about these two products that make them look similar? (please select or state all that apply)

Other specify...

End of Filter

4. How likely do you think one of these products could be bought by mistake believing it to be other one?

5. If product A were to cost {x} and B cost {y}, then how likely would you be to buy product A?

6. How likely would you be to buy product B?

Appendix C – Face to Face Weighting Procedures

The data is weighted to ensure that demographic profiles match those for the main groceries shopper in the household aged 16 or over living in Great Britain. A rim weighting technique is used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.

The actual weights applied thus vary slightly between surveys; precise figures for specific cases are available from BMRB if required.

Target Weights Applied:

Sex 1:

	%
Men	30.07
Women without children	44.02
Women with children	25.91

Sex 2:

Men working full time	15.31
All other men	14.76
Women working at all	33.04
All other women	36.89

Age:

	% Men	Women
16 - 24	1.94	4.96
25 - 34	5.58	11.08
35 - 44	5.67	14.26
45 - 54	5.44	11.92
55 - 64	4.93	11.10
65+	6.51	16.61

Social Grade

	% Men	Women
AB	9.06	17.06
C1	7.84	21.28
C2	6.09	12.69
D	4.36	11.33
E	2.72	7.57

Standard Region

	%
Scotland	8.75
North West	10.79
North	5.29
Yorks/Humber	8.75
East Midlands	7.02
East Anglia	3.44
South East	19.08
Greater London	14.65
South West	8.52
Wales	4.95
West Midlands	8.76

(Source of profile data: BMRB Target Group Index, 2007 and NRS, 2007)

Appendix D – Face to Face Confidence Limits

Statistical Confidence Limits

Statistical confidence in the data is calculated in terms of a standard error which would relate to a survey result if it had been derived from a strict random sample, together with a design effect which relates statistical accuracy to the survey methods used.

Design Factor

The design factor varies, even within one survey, according to the statistic being considered, and so only an estimate for general use can be given here. For face-to-face surveys, the size of the design factor depends on the degree of clustering in the sample. This in turn depends on the unweighted size of the sample or subgroup, and the number of weeks over which data were collected:

Unweighted Sample Size

	250	500	750	1,000	1,500	2,000	3,000	4,000	5,000	6,000
Weeks										
1	1.0	1.0	1.1	1.1	1.2	1.3				
2	1.0	1.0	1.0	1.1	1.1	1.1	1.2	1.3		
3	1.0	1.0	1.0	1.0	1.0	1.1	1.1	1.2	1.2	1.3

Subgroups of all adults in a geographic region are an exception to this pattern; in this case the design factor is the same as for the total sample.

Standard Error

Once the design effect has been obtained from Design Factor^2, it may be used to calculate the effective sample size:

$$\text{Effective sample size} = \frac{\text{Actual sample size}}{\text{Design Effect}}$$

The standard error for a percentage p is then calculated as:

$$\sqrt{\frac{p \times (100-p)}{\text{Effective sample size}}}$$

The 95% confidence interval for a percentage is ± 2 times the standard error.

To test whether the difference between two percentages p and q, based on effective sample sizes of m and n, is significant, calculate:

$$\pm 2 \sqrt{\frac{p \times (100-p)}{m} + \frac{q \times (100-q)}{n}}$$

The actual difference observed should only be considered significant with 95% confidence if it exceeds the result of this formula.

ACCURACY OF RESULTS AT 95% LEVEL

UNWEIGHTED SAMPLE SIZE

(For total sample or sub-groups but not regional sub samples conducted over a single week)

		2,000	**1,500**	**1,000**	**750**	**500**	**300**	**200**	**100**
	Design Effect	1.3	1.2	1.1	1.1	1.0	1.0	1.0	1.0
Percentage of respondents									
10%		±2	±2	±2	±2	±3	±3	±4	±6
20%		±2	±2	±3	±3	±4	±5	±6	±8
25%		±2	±3	±3	±3	±4	±5	±6	±8
40%		±3	±3	±3	±4	±5	±6	±7	±10
50%		±3	±3	±4	±4	±5	±6	±7	±10
60%		±3	±3	±3	±4	±5	±6	±7	±10
75%		±2	±3	±3	±3	±4	±5	±6	±8
80%		±2	±2	±3	±3	±4	±5	±6	±8
90%		±2	±2	±2	±2	±3	±3	±4	±6

For example, if 20% of a total sample of 1,000 adults said they do something, you can be 95% certain that the figure for the population lies between 17% and 23%.

Appendix E – Online Weighting Procedures

The data are weighted to ensure that demographic profiles match those for all adults in Great Britain aged 16-64 who use the Internet and do almost all, more than half or at least half of the grocery shopping in the household. A rim weighting technique is used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.

The actual weights applied thus vary slightly between surveys; precise figures for specific cases are available from BMRB if required.

Target Weights Applied:

Sex:		%
	Men	41.60
	Women	58.40

Age:		%
	16 - 24	12.10
	25 - 34	22.90
	35 - 44	26.90
	45 - 54	22.40
	55 - 64	15.70

Social Grade:		%
	ABC1	62.20
	C2DE	37.80

ISBA Region		**%**
	North (North, North West, Yorkshire Humberside, Scotland)	31.80
	South (South West, South East, Greater London)	43.40
	Midlands (East & West Midlands, East Anglia, Wales)	24.80

(Source of profile data: BMRB Target Group Index, 2008 and NRS, 2008)

Appendix F – Face to face photographs

Note that respondents were shown one photograph at a time, with the order rotated.

Ultima

Sherry's Active

Buttery Gold

You'd Butter Believe It

Appendix G – Online photographs


2
I can't believe it's not Butter
Half The Saturated Fat Of Butter
ASDA
You'd Butter Believe It!
PRODUCT X
PRODUCT Y


2C
I can't believe it's not Butter
Half The Saturated Fat Of Butter
ASDA
Buttery Gold
PRODUCT X
PRODUCT Y


3
Red Bull
ENERGY DRINK
Vitalizes body and mind
RED
THUNDER
PRODUCT X
PRODUCT Y


3C
Red Bull
ENERGY DRINK
Vitalizes body and mind
Emerge
Stimulation Drink
PRODUCT X
PRODUCT Y


4
SARSON'S
Malt
VINEGAR
SAMSON
MALT
VINEGAR
568ml e
PRODUCT X
PRODUCT Y


4C
SARSON'S
Malt
VINEGAR
TESCO
Malt vinegar
PRODUCT X
PRODUCT Y


5
LURPAK
SPREADABLE
SLIGHTLY SALTED
500g
Danpak
SPREADABLE
PRODUCT X
PRODUCT Y


5C
LURPAK
SPREADABLE
SLIGHTLY SALTED
500g
ASDA
Spreadable
PRODUCT X
PRODUCT Y


6
Carex
ORIGINAL
TESCO
Moisturising
Antibacterial
Handwash
Refreshing
PRODUCT X
PRODUCT Y


6C
Carex
ORIGINAL
TESCO
Deep Cleansing
antibacterial
handwash
PRODUCT X
PRODUCT Y


7
PRODUCT X
Jam packed
Family Pack
Jammie
DODGERS
Original
PRODUCT Y
TOWER GATE
Jammy Rings
Shortcake Biscuits filled with
Raspberry Flavour Jam
300g


7C
PRODUCT X
Jammie
DODGERS
Original
PRODUCT Y
Jam
Sandwich
Cream


8
PRODUCT X
for men
Kleenex
PRODUCT Y
Luxury
Soft
mansize facial tissue


8C
PRODUCT X
for men
Kleenex
PRODUCT Y
LARGE
TISSUES
100 2 PLY WHITE TISSUES
FSC


9
Utterly Butterly
Utterly Butterly
Easily Better
Easily Better
LOW in Saturates
HIGH in Monounsaturates
500g
PRODUCT X
PRODUCT Y


9C
Utterly Butterly
Utterly Butterly
Buttery Gold
Buttery Gold
PRODUCT X
PRODUCT Y


10
PREMIUM LAGER BEER
STELLA ARTOIS
LEUVEN
Premium Continental Lager
440 ml e
SAINTE ETIENNE
STRONG
Continental Lager
PRODUCT X
PRODUCT Y


10C
PREMIUM LAGER BEER
STELLA ARTOIS
LEUVEN
Premium Continental Lager
440 ml e
BELGIAN PREMIUM LAGER
PRODUCT OF BELGIUM
5.2% Vol 500ml e
PRODUCT X
PRODUCT Y