

How to help consumers adopt refill on the go

Key findings and recommendations from communication trials with three UK retailers promoting refill on the go

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Sustainability from **IGD**



Building evidence to help consumers adopt reusable packaging

A shared ambition

In 2021, IGD brought together stakeholders to create a shared ambition - **to halve the environmental impacts of UK packaging systems by 2030.**

Business as usual will not deliver the Ambition; there will need to be at least a 20% reduction in the amount of packaging on the market.

Reducing the need for single-use packaging through reusables is a vital part of the solution. However, industry trials haven't scaled yet and currently consumer uptake is slow.

Consumer research

Our previous consumer research '[How to help consumers adopt reusable packaging](#)' (2021) explored attitudes towards reusable packaging. It revealed most consumers (83%) are open to change but they need greater support to overcome perceived barriers, particularly for refill on the go.

We made recommendations centred around **cost**, **ease** and providing **reassurance** on factors including hygiene. We also highlighted the need for more real-life trials.

Retail communication trials

We partnered with environmental charity Hubbub and three UK retailers to deliver a series of communication trials between 2022-23. The trials aimed to help consumers overcome key barriers to adopting reusable packaging.

This report shares key findings and recommendations from our **refill on the go** trials with **Aldi**, **Asda** and **M&S**.

Key findings and recommendations to help consumers adopt refill on the go

Communication plays a key role in encouraging consumers to try refill on go

Our latest research reinforces that cost and ease are still acting as barriers for consumers trying refill on the go.

Marketing with messaging centred around cost, helped consumers understand that refill was cheaper than the packaged equivalent in the trial stores.

Shelf edge labels at the packaged equivalent delivered the best results, whilst step-by-step guidance helped to boost confidence.

Recommendations for marketing refill on the go

- ▲ Highlight cost savings of refill on the go at the packaged equivalent.
- ▲ Show others using it and include step by step guidance to boost confidence and help overcome concerns around ease.
- ▲ Consider other customer touchpoints to boost awareness. If using social media – keep it short.
- ▲ Grab attention quickly with a bold design and simple messaging featuring a strong call to action.

Operational priorities to set marketing campaigns up for success

Refill on the go needs to feel easy and consumers need reassurance on factors including hygiene and quality.

Retailers and brands should continue to focus efforts on removing friction points to help encourage new habits and make the process feel less intimidating.

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What is reusable packaging?

There are four types of reusable packaging systems; refill on the go, refill at home, return on the go and return at home.

The focus of our communication trials was refill on the go.

How refill on the go works

Consumers fill a container or bag with a food or drink product using an in-store dispenser.

This typically involves the consumer bringing in their own container or bag, or buying a reusable one in-store, and weighing and paying for the weight of food or drink taken.

The user journey and products available can vary by retail outlet, for example with some offering free paper bags, or a mix of own-label and branded products.

Reusable packaging systems



Refill on the go

e.g. refill in-store



Refill at home

e.g. packaged to use at home



Return on the go

e.g. return to a return point



Return from home

e.g. return to a delivery driver

Why reusable packaging is important

Reusable packaging can be used again for the same purpose for which it was conceived. It reduces the need for single use packaging and helps to reduce waste, pollution and other environmental and social impacts. Breaking away from our current – make, use, waste – linear systems approach is an industry critical issue, and reusable packaging is a vital part of the solution.

In recent years there has been a greater focus on providing reusable packaging, including refill on the go, with major retailers and brands trialling new initiatives.

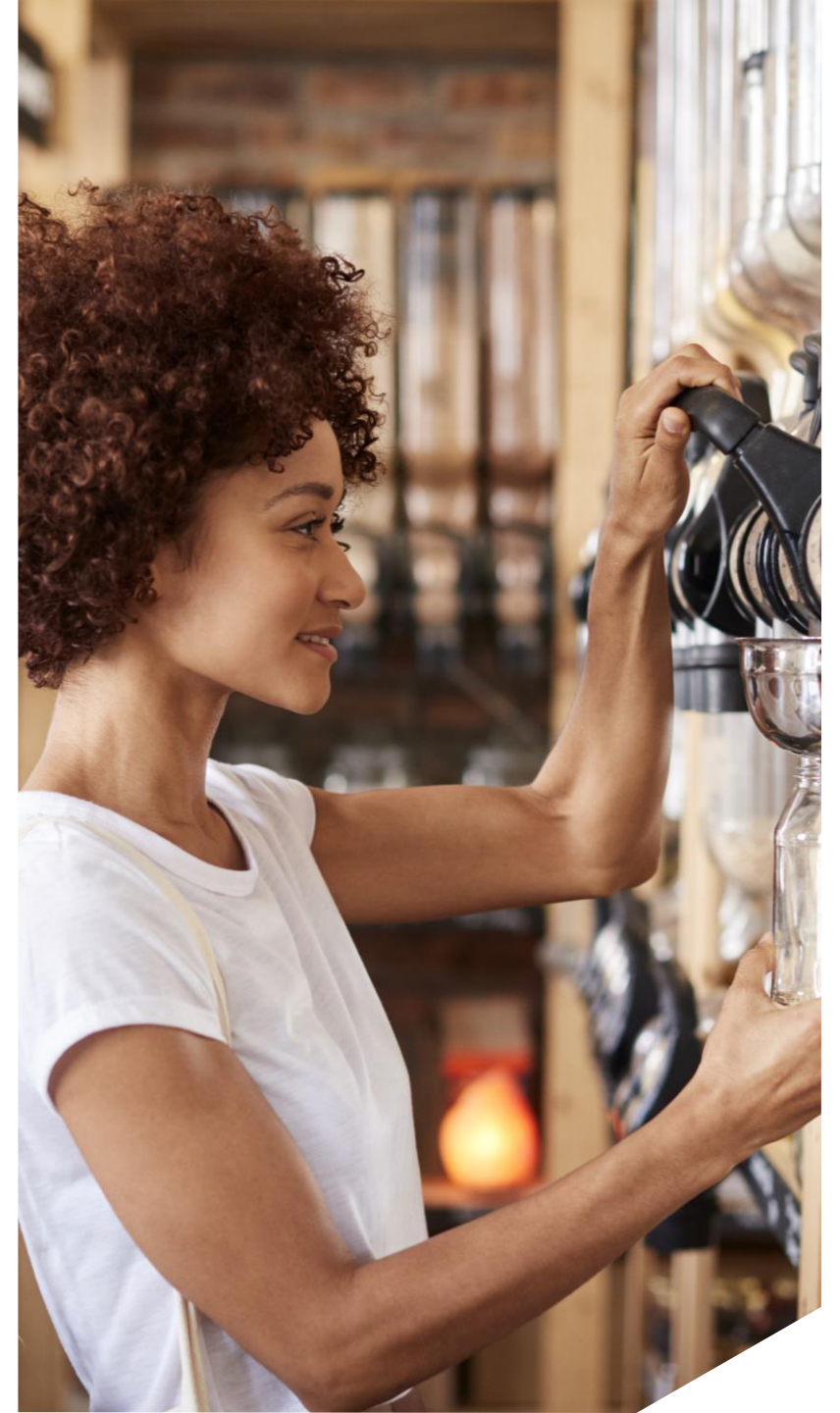
New technologies and shifting consumer behaviours will be key to making reusable packaging mainstream.



Building evidence for reusable packaging

Our previous consumer research '[How to help consumers adopt reusable packaging](#)' (2021) explored attitudes towards reusable packaging. It revealed most consumers (83%) are open to change but they need greater support to overcome perceived barriers. We made recommendations centred around **cost**, **ease** and providing **reassurance** on factors including hygiene and quality. We also highlighted the need for more real-life trials.

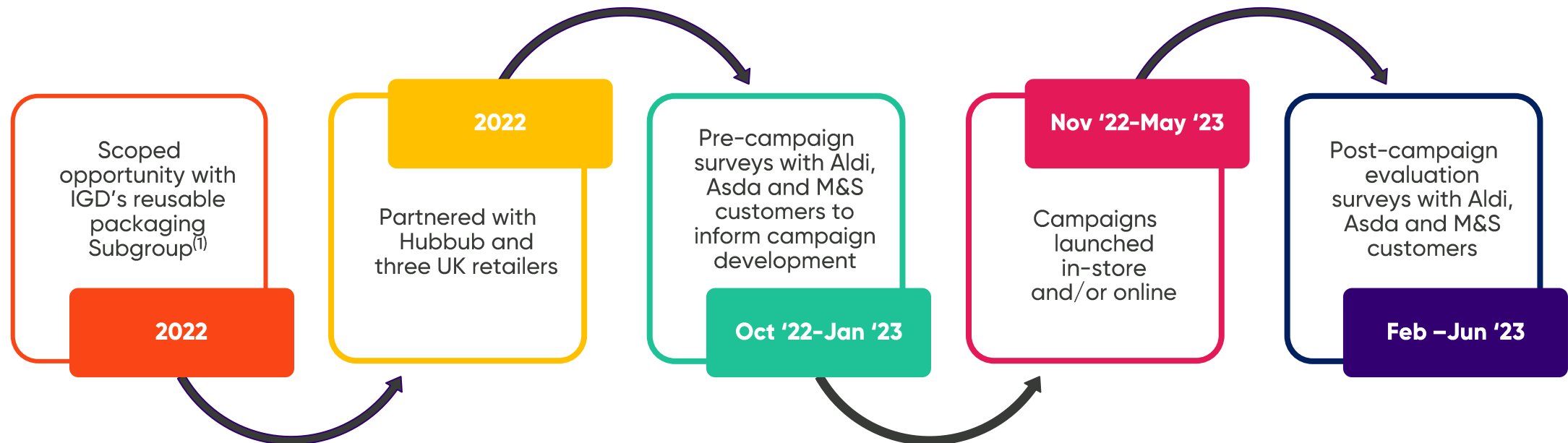
Our latest research provides new insight to better understand the opportunities to communicate with consumers and help them adopt refill on the go.



Our research approach

We partnered with environmental charity Hubbub and three UK retailers, Aldi, Asda and M&S, to develop and test a series of in-store and online communications. The trials aimed to support consumers to overcome key barriers to adopting refill on the go.

Hubbub led the development of the campaign materials and evaluation, applying behaviour change theory. This was also informed by engagement with packaging stakeholders and customer surveys.



¹IGD's reusable packaging Subgroup brings together packaging experts to discuss challenges and opportunities for reusable packaging. The group comprises around 30 organisations across the food system, including industry, academia and NGO's.

Refill on the go trial stores



Aldi opened its first eco-concept store trialling refill at Royal Leamington Spa in 2022.

Refill range: nuts and coffee.

Location in store: in a main aisle with other ambient products such as cereal bars and hot drinks.



Asda opened its first sustainability store trialling refill at Leeds in 2020. Since then, three more refill zones have opened⁽¹⁾.

Refill range: cereals, pet food, store cupboard (including snacks, tea and coffee), rice, pasta and pulses.

Location in store: in a dedicated space towards the back of each store, segregated from other products.



M&S launched 'Fill Your Own' in 2019 and is continuing to test, learn and adapt its approach. Our trial centred around six M&S stores offering 'Fill Your Own'⁽²⁾.

Refill range: cereals, rice, pasta, lentils, chocolate covered nuts and coffee.

Location in store: in a dedicated space in the middle of the store, positioned in a main aisle.

The campaign elements we tested

Our retail partners were already offering refill on the go at a cheaper price than the packaged equivalent.

We promoted cost-savings as an overarching theme for our trials, introducing a variety of communications at key customer touchpoints.



Before entering the store

Aldi, Asda and M&S promoted digital content on social media close to the trial stores.

Image: Video advertised on Facebook and Instagram around six M&S trial stores.



Inside the store

Aldi and Asda introduced signage inside the trial stores, including by the packaged equivalent products.

Image: Shelf edge labels at Aldi, Leamington Spa.



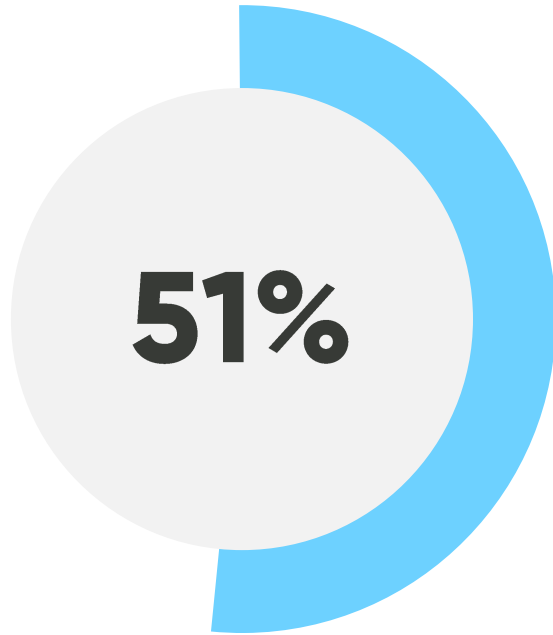
Arriving at the refill fixture

Aldi and Asda updated digital screens and signage at the refill fixture with simple step-by-step instructions.

Image: Colleague uniforms and a digital screen at the Refill Zone in Asda, Milton Keynes.

**Consumers are open
to refill on the go, but need
help to overcome barriers**

Around half of consumers noticed refill on the go, but most haven't tried it yet



...noticed refill on the go when shopping at the trial stores

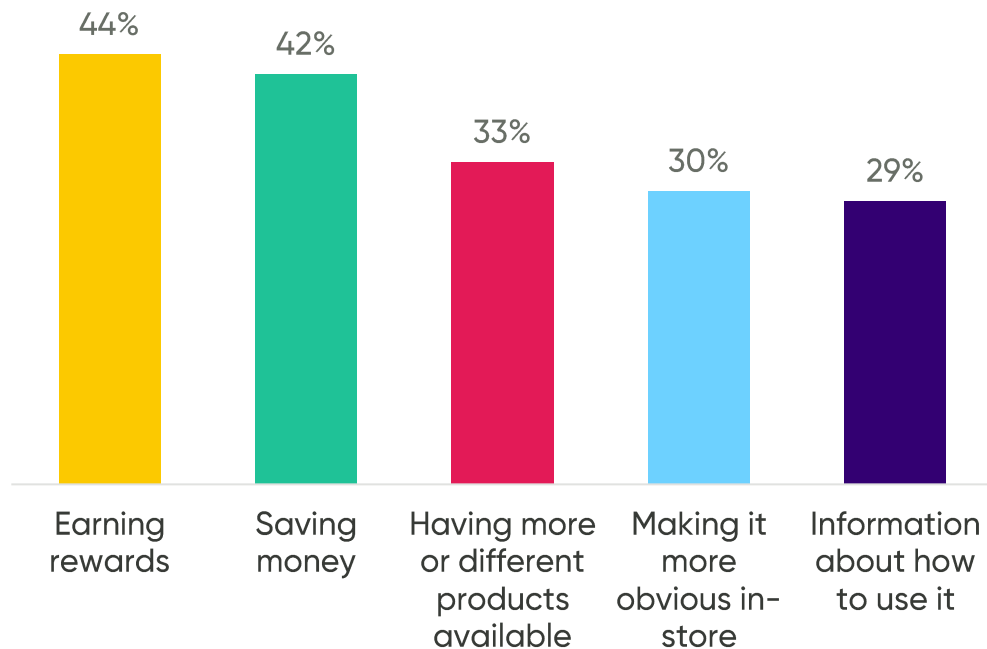
Around three-quarters (76%) of consumers told us they had not used refill on the go at the trial stores, despite many of them noticing it when shopping.

We know from our previous research that consumers are open to change but perceive a number of barriers to adopting reusable packaging, such as cost, ease and concerns around hygiene and quality.

Our latest research reinforces that these are still acting as barriers for consumers trying refill on the go.

Cost is key to motivating consumers to try refill on the go

Top 5 motivators (for those that haven't tried refill on the go)



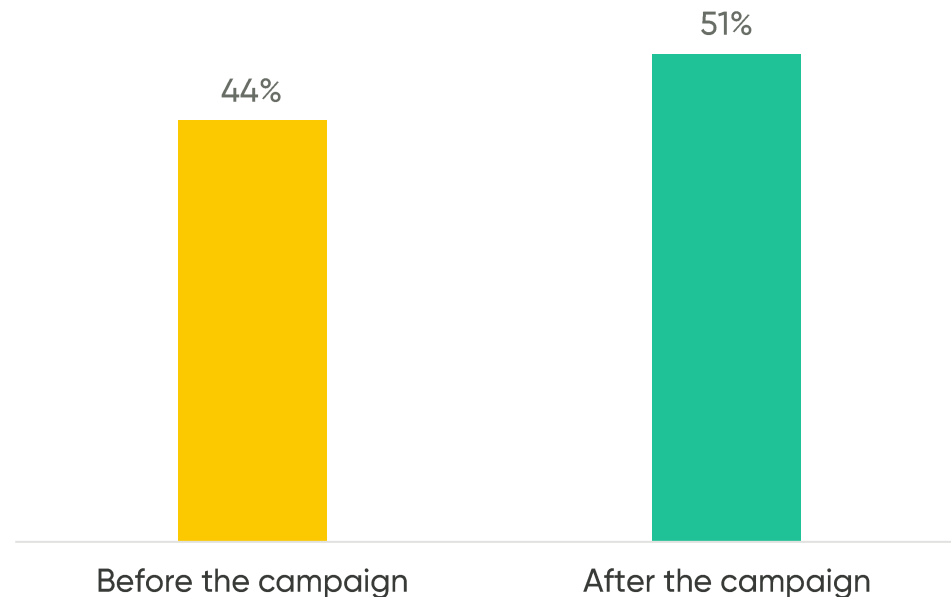
Communicating cost-savings is a key opportunity to motivate consumers to try refill on the go, with earning rewards (44%) and saving money (42%) cited as top motivators. These may feel especially relevant at a time when many are looking to manage how much they spend.

A third (33%) would like to see more or different products and others would like to see more activity to promote awareness of refill on the go in-store (30%) or information about how to use it (29%).

**Communication plays
a key role in encouraging
consumers to try refill
on the go**

Communications helped raise awareness that refill on the go was cheaper

% that agreed 'refill is always cheaper than the packaged equivalent'



In-store signage with messaging centred around cost helped consumers understand that refill on the go products were cheaper than the packaged equivalents.

We also saw better engagement on social media content that was centred around cost.

For example, those that saw M&S videos were more likely to recall that refill on the go is cheaper (68%) than seeing advice about how to use it (52%).

The following section explores the impact of the different campaign elements we tested.

Shelf edge labels at the packaged equivalent delivered the best results



Signage promoting refill on the go throughout the store, including shelf edge labels at the packaged equivalent products, was the most recognised campaign element.

Nearly half (46%) of consumers that had noticed refill on the go, remembered seeing shelf edge labels or other signage around the store. Even more consumers (60%) noticed these signs at Asda where the greatest quantity of signage was placed throughout the store.

Fewer consumers recalled seeing refill on the go being promoted on colleague uniforms (13%) or social media (8%).

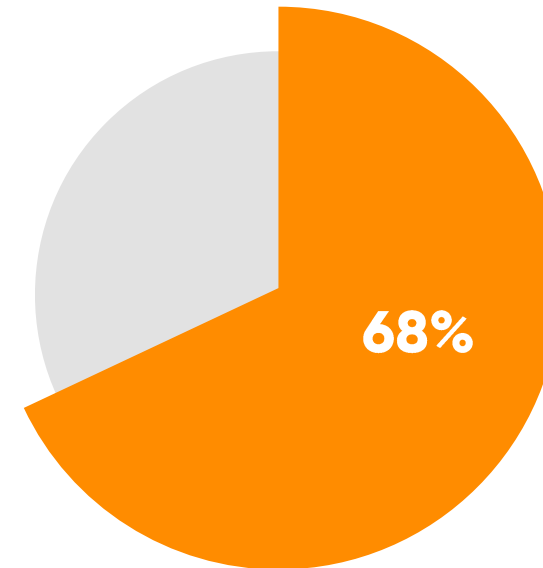
Step-by-step guidance boosted confidence

Around a fifth (21%) of consumers noticed the step-by-step video guidance in Asda's Refill Zone.

Whilst awareness for more traditional signage (such as printed shelf edge labels) was higher, the digital screens with step-by-step guidance boosted consumer confidence.

Videos promoted on social media at Asda and M&S also included step-by-step guidance featuring consumers using refill on the go. This resulted in higher awareness that consumers can use their own containers to refill.

After being shown the step-by-step guidance at the refill area, 45%⁽¹⁾ of consumers said they were more likely to try refill on the go. Fewer said they were more likely to try it after seeing videos on social media (28%)⁽²⁾ or signage at the packaged equivalent (42%)⁽²⁾.



...agreed step-by-step guidance helped them better understand how to use refill on the go⁽¹⁾

Videos on social media reached a large audience but recall in-store was low

Videos promoted on Facebook and Instagram, reached just over **2 million** consumers, with an average engagement rate of 24%.

Despite the reach, only 8% of consumers remembered seeing the videos when asked in-store. This could be explained by only a small proportion (1%) watching the content all the way through.

Performance varied by channel and content:

- ▶ **Shorter animated GIFs** were watched all the way through more than videos (lasting around 30 seconds)
- ▶ **Videos** centred around cost got highest engagement
- ▶ Content on **Facebook** got higher engagement than Instagram



Recommendations for marketing refill on the go

Highlight cost savings of refill on the go

Call out cost savings of refill on the go compared to the packaged equivalent.

Consider other incentives to encourage new habits e.g. loyalty points.

Introduce shelf edge labels and use other key touchpoints to boost awareness

Introduce shelf edge labels at the packaged equivalent to signpost refill on the go and highlight cost savings or other incentives.

Show others using refill on the go and include step by step guidance to boost confidence and overcome concerns around ease.

Consider other customer touchpoints in and around the store to drive further awareness amongst your target audience, such as store entrance and colleagues.

Grab attention quickly with a bold design and a strong call to action

Use a bold design and simple language to help the refill fixture and any communications around the store grab attention quickly and stand out from other promotional activity.

Feature simple and consistent messaging with a strong call to action throughout.

If using digital communications or social media – keep the content short and targeted to those shopping near refill on the go.

Operational priorities to set marketing campaigns up for success

Refill on the go needs to feel easy and consumers need reassurance on factors including hygiene and quality.

Retailers and brands should continue to focus efforts on removing friction points to help encourage new habits and make the process feel less intimidating.



Cost

- ▲ Refill on the go should be cheaper than the packaged equivalent.
- ▲ Help consumers anticipate how much they are dispensing e.g. what does 100g look like?



Ease

- ▲ Consider how you can make the refill fixture a prominent location in-store.
- ▲ Keep the refill fixture well-stocked and in good working order.
- ▲ Make the refill process easy.
- ▲ Choose the right product range – make it fun!



Reassurance

- ▲ Give reassurance around hygiene and quality.
- ▲ Help consumers understand the wider benefits they have contributed to e.g. less packaging.

Retailer perspectives

Our retail partners have used the trial learnings, combined with their own insights, to influence their sustainable packaging strategies, and help consumers overcome barriers to adopting reusable packaging.



ASDA

M&S
EST. 1884

Our work with IGD allowed us to focus our marketing on the points that matter to our customers.

We have applied these learnings when launching our latest Refill fixture at our Solihull store, ensuring our customers know that the refill and reuse format is a sustainable and affordable way to shop.

Since we opened our first sustainability trial store in 2020, we've been learning and developing our programme of work on reusable packaging. Insights from IGD have been invaluable in shaping our work to date, and this report contributes further to our understanding of how to best enable customers to adopt more sustainable shopping habits going forwards.

IGD Insights allowed us to better understand barriers and motivators for customers, and tools for us to better promote Refill. We're keen to leverage these findings in future.

Join our network to halve the environmental impact of all packaging systems by 2030

Get in touch at sustainability@igd.com

from **IGD**



IGD is here to support industry

We mobilise industry across the following workstreams for sustainable packaging systems

Strategic reports

Create insights that encourage and mobilise industry to take action

- ▶ [How to help consumers adopt reusable packaging](#)
- ▶ [Halving the environmental impacts of the UK packaging system \(Ambition\)](#)
- ▶ [Secondary and tertiary packaging in the food and consumer goods industry](#)
- ▶ [Supermarket heatmap](#)

Practical tools

Deliver resources that help industry to work towards the Ambition

- ▶ [Sustainable packaging choices tool](#)
- ▶ [Materials switching guide](#)
- ▶ [Lifecycle assessment best practice guide](#)
- ▶ [Lifecycle assessment best practice summary](#)
- ▶ [Lifecycle assessment best practice webinar](#)

Collaboration

Continue to convene stakeholders across the whole value chain focused on collective action, innovation and positive systemic change

Get in touch at
sustainability@igd.com

Find out more about our Sustainability Programmes:
www.igd.com/Social-impact/Sustainability

Appendix: Campaign elements we tested

from **IGD**



Campaign elements we tested at Aldi

Key message:

**Swap to refill.
Always a better price
than packaged.**



In-store signage

New signage was installed at the refill area and by the packaged equivalents to promote cost savings.

This included large in-aisle hanging boards and shelf edge labels at the packaged equivalent products.

The refill fixture was also updated with bold colours and simple step-by-step instructions to help consumers understand how to use it and make it stand out.

Digital screens

Digital screens were updated at the refill area (with simple step-by-step instructions to help consumers understand how to use the refill) and the store entrance (to signpost the refill fixture in-store).

Social media

Two GIFs were promoted on social media (Facebook and Instagram) targeting users within 5km of the trial store. Content centred around cost and the products available.

Campaign elements we tested at Asda

Key message:

**Give refill a go.
Same products,
always cheaper.**

Some signage in the Refill Zone (information to help consumers anticipate how much they are dispensing) was introduced by Asda before the campaign launch but remained in place throughout the trial. Asda colleagues also offered free samples from the Refill Zone for a limited period before the campaign launch.



In-store signage

New signage was installed at the Refill Zone and packaged equivalents to promote the Refill Price Promise. Signage was already in place to help consumers anticipate how much they are dispensing e.g. what does 100g look like.

Digital screens

The weighing scales and digital screens at the Refill Zone were updated with simple step-by-step instructions to help consumers understand how to use the Refill Zone.

Colleague engagement

Colleagues at the Refill Zone wore a new uniform with refill messaging to promote awareness of the Refill Price Promise.

Social media

Three videos were promoted on social media (Facebook and Instagram) targeting users within 5km of the trial stores. Content included the Refill Price Promise, how to use Refill Zone and advice to bring your own containers.

Campaign elements we tested at **M&S**



Key message:

**Fill Your Own.
Always 10% cheaper
than packaged.**

Social media

Three videos were promoted on social media (Facebook and Instagram) targeting users within 10km of the trial stores. Content centred around cost savings, how to use Fill Your Own and advice to bring your own containers.