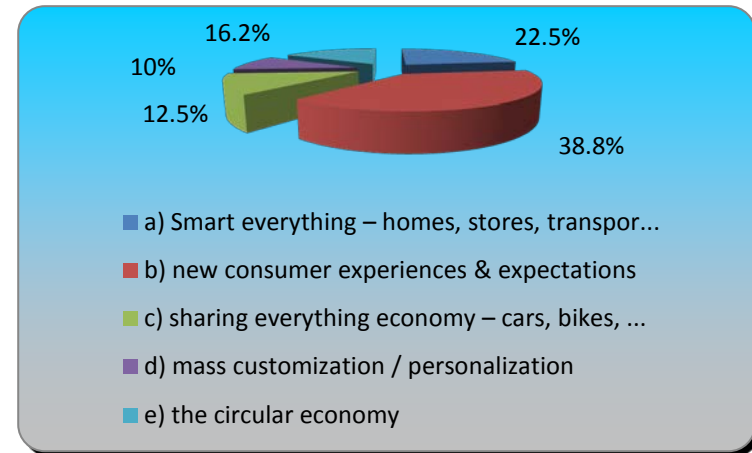


DOTS Graphical Results by Question

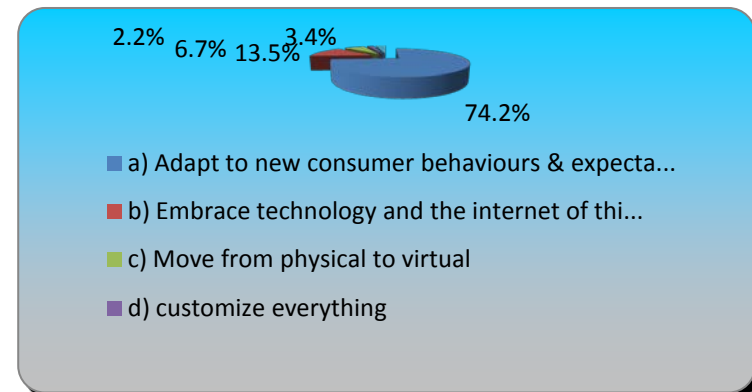
Session Name: pac day 1 last session

Created: 10/4/2016 8:01 AM

<u>1.) What will be the value-creators in 2025? (multiple choice)</u>	<u>Responses</u>	
a) Smart everything – homes, stores, transpor...	18	22.50%
b) new consumer experiences & expectations	31	38.75%
c) sharing everything economy – cars, bikes, ...	10	12.50%
d) mass customization / personalization	8	10%
e) the circular economy	13	16.25%
Totals	80	100%

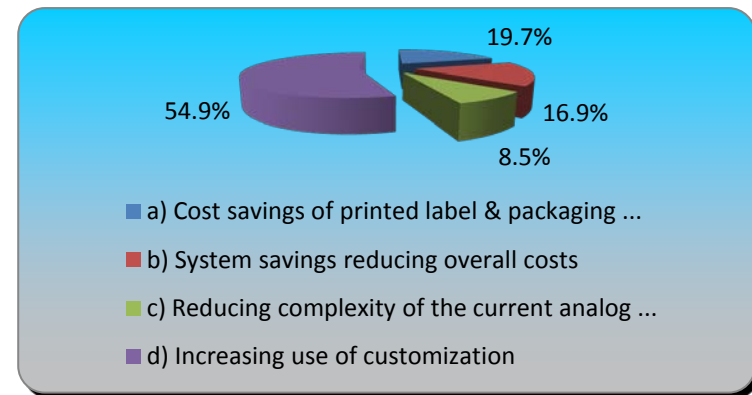


<u>2.) What's critical for meaningful strategic change in 2025? (multiple choice)</u>	<u>Responses</u>	
a) Adapt to new consumer behaviours & expecta...	66	74.16%
b) Embrace technology and the internet of thi...	12	13.48%
c) Move from physical to virtual	6	6.74%
d) customize everything	2	2.25%
e) Turn all waste into valuable commodities	3	3.37%
Totals	89	100%



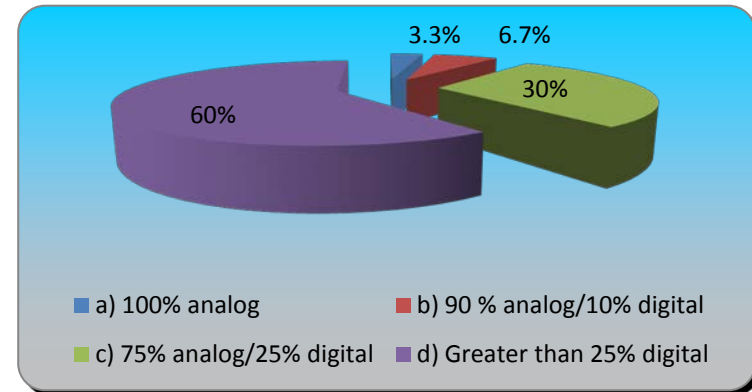
3.) What are you looking for digital labels & packaging to accomplish for your company? (multiple choice)

	Responses	
a) Cost savings of printed label & packaging ...	14	19.72%
b) System savings reducing overall costs	12	16.90%
c) Reducing complexity of the current analog ...	6	8.45%
d) Increasing use of customization	39	54.93%
Totals	71	100%



4.) How will you use analog assets in 2020? (multiple choice)

	Responses	
a) 100% analog	2	3.33%
b) 90 % analog/10% digital	4	6.67%
c) 75% analog/25% digital	18	30%
d) Greater than 25% digital	36	60%
Totals	60	100%

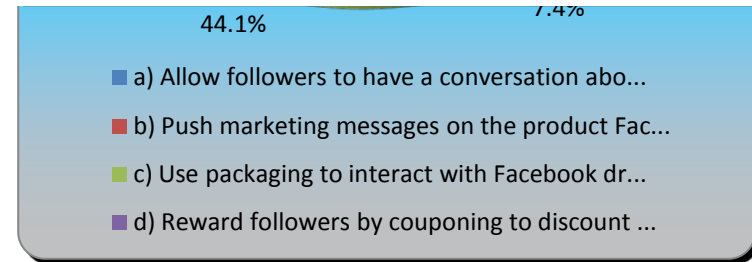


5.) How can brands use their Facebook page to make money? (multiple choice)

	Responses	
a) Allow followers to have a conversation abo...	21	30.88%

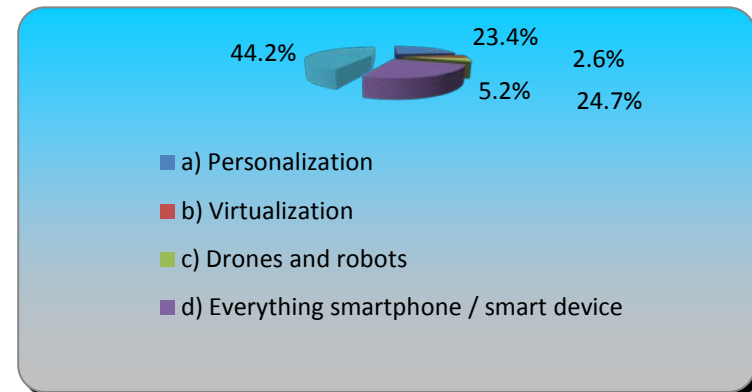


b) Push marketing messages on the product Fac...	5	7.35%
c) Use packaging to interact with Facebook dr...	30	44.12%
d) Reward followers by couponing to discount ...	12	17.65%
Totals	68	100%



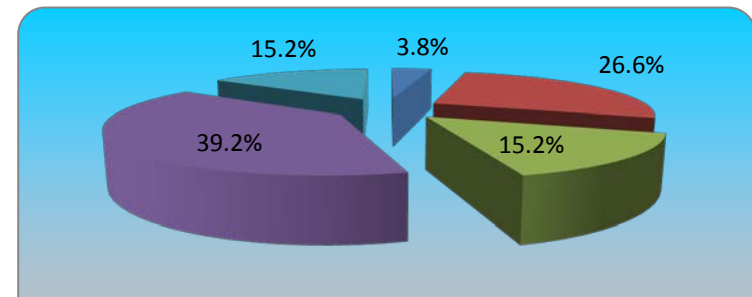
6.) What consumer offerings can we be certain to see in Retail by 2025? (multiple choice)

	Responses	
a) Personalization	18	23.38%
b) Virtualization	2	2.60%
c) Drones and robots	4	5.19%
d) Everything smartphone / smart device	19	24.68%
e) On demand	34	44.16%
Totals	77	100%



7.) Discount represents what percentage of food shopping in Canada? (multiple choice)

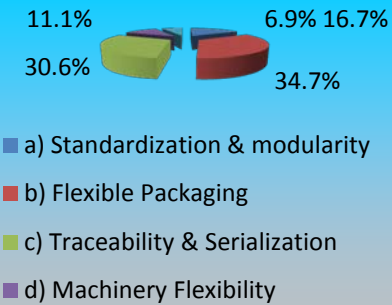
	Responses	
a) 17%	3	3.80%
b) 38%	21	26.58%
c) 41%	12	15.19%
d) 45%	31	39.24%
e) 56%	12	15.19%
Totals	79	100%



■ a) 17% ■ b) 38% ■ c) 41% ■ d) 45% ■ e) 56%

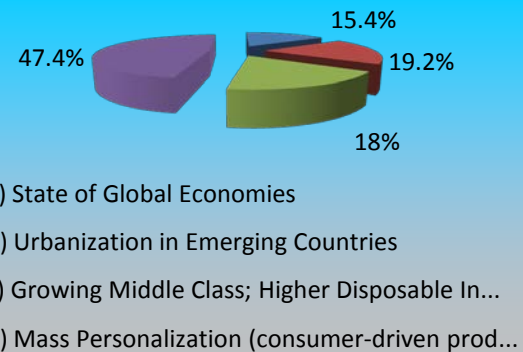
8.) Which of the following trends will have the greatest stronghold on the packaging industry by 2025? (multiple choice)

	Responses	
a) Standardization & modularity	12	16.67%
b) Flexible Packaging	25	34.72%
c) Traceability & Serialization	22	30.56%
d) Machinery Flexibility	8	11.11%
e) Robotics	5	6.94%
Totals	72	100%



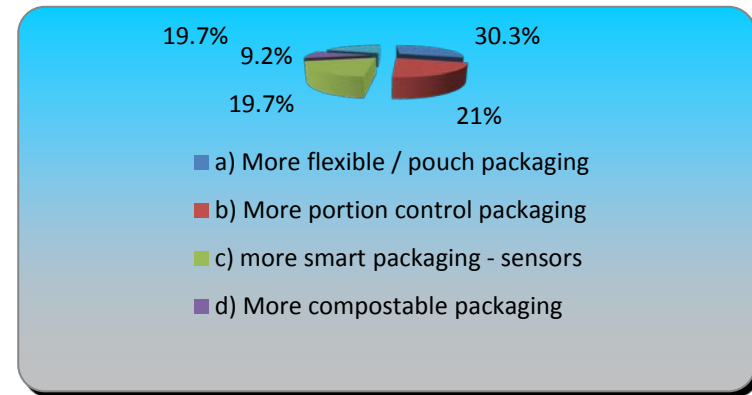
9.) What do you think is the biggest factor that will affect growth in the packaging industry? (multiple choice)

	Responses	
a) State of Global Economies	12	15.38%
b) Urbanization in Emerging Countries	15	19.23%
c) Growing Middle Class; Higher Disposable In...	14	17.95%
d) Mass Personalization (consumer-driven prod...	37	47.44%
Totals	78	100%



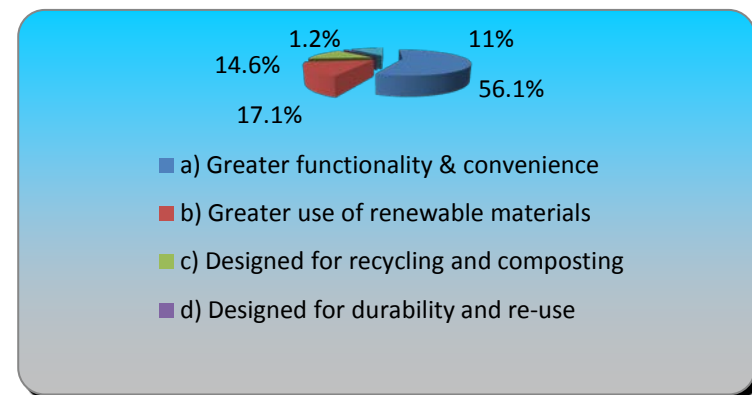
**10.) What packaging trends do you expect to see in 2025?
(multiple choice)**

	Responses	
a) More flexible / pouch packaging	23	30.26%
b) More portion control packaging	16	21.05%
c) more smart packaging - sensors	15	19.74%
d) More compostable packaging	7	9.21%
e) Less packaging	15	19.74%
Totals	76	100%



11.) What will packaging solutions look like in 2025? (multiple choice)

	Responses	
a) Greater functionality & convenience	46	56.10%
b) Greater use of renewable materials	14	17.07%
c) Designed for recycling and composting	12	14.63%
d) Designed for durability and re-use	1	1.22%
e) Designs that eliminate packaging	9	10.98%
Totals	82	100%



12.) What are most important factors to deliver hyper brand



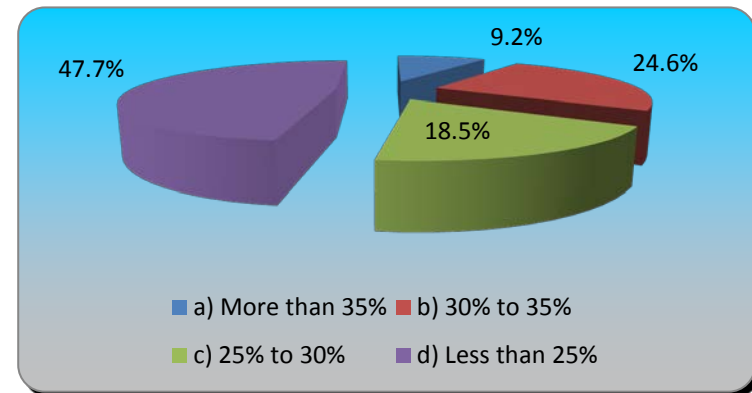
customization? (multiple choice)

	Responses	
a) brand identity / package design	42	60%
b) advertising & brand communication	12	17.14%
c) shopper marketing	6	8.57%
d) social media & web presence	10	14.29%
e) event marketing	0	0%
Totals	70	100%



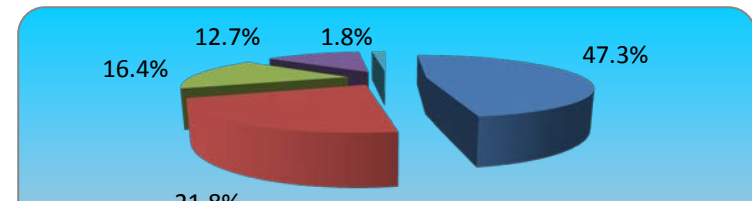
13.) What are the increased costs of hyper customized packaging versus traditional pre press and printing? (multiple choice)

	Responses	
a) More than 35%	6	9.23%
b) 30% to 35%	16	24.62%
c) 25% to 30%	12	18.46%
d) Less than 25%	31	47.69%
Totals	65	100%

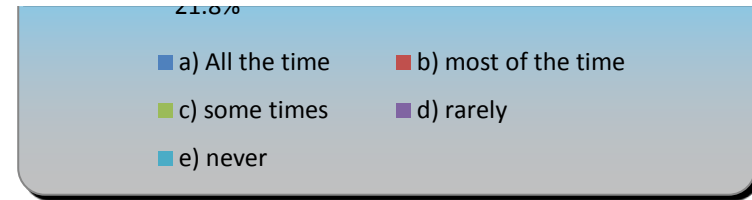


14.) Is channel strategy an appropriate part of your business plans, brand plans and creative briefs? (multiple choice)

	Responses	
a) All the time	26	47.27%
b) most of the time	12	21.82%

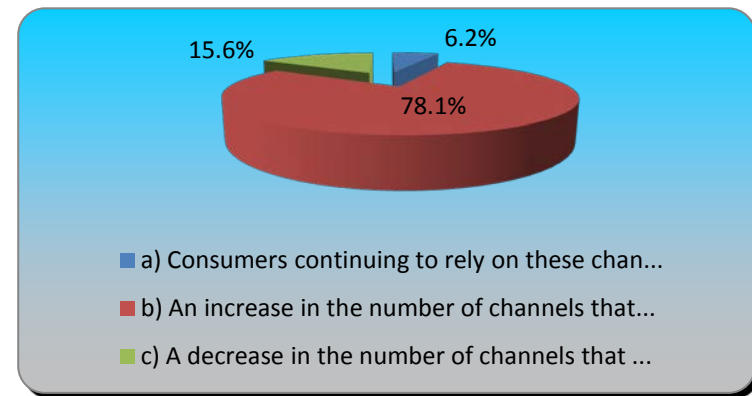


c) some times	9	16.36%
d) rarely	7	12.73%
e) never	1	1.82%
Totals	55	100%



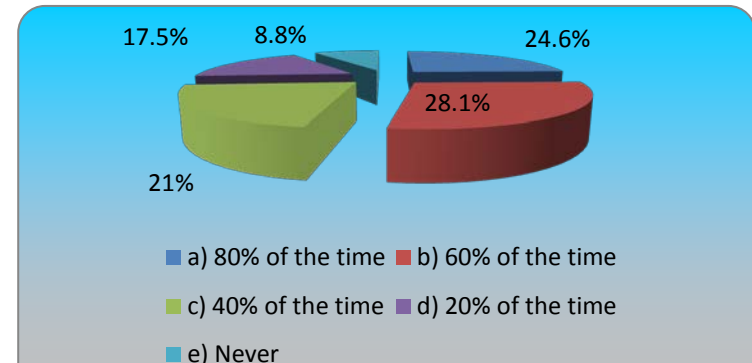
15.) In the future, do you envision: (multiple choice)

	Responses	
a) Consumers continuing to rely on these chan...	4	6.25%
b) An increase in the number of channels that...	50	78.12%
c) A decrease in the number of channels that ...	10	15.62%
Totals	64	100%



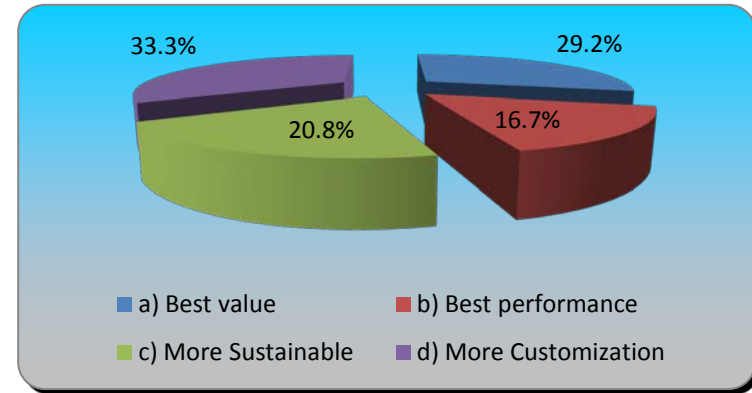
16.) How often do you see brand owners relying on retailers regarding the behaviour of their brand? (multiple choice)

	Responses	
a) 80% of the time	14	24.56%
b) 60% of the time	16	28.07%
c) 40% of the time	12	21.05%
d) 20% of the time	10	17.54%
e) Never	5	8.77%
Totals	57	100%



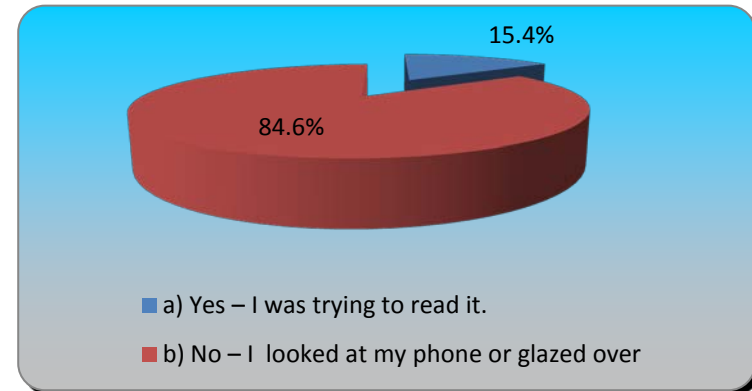
17.) What are the key competing consumer preferences that will impact package evolution over the next 10 years? (multiple choice)

	Responses	
a) Best value	14	29.17%
b) Best performance	8	16.67%
c) More Sustainable	10	20.83%
d) More Customization	16	33.33%
Totals	48	100%



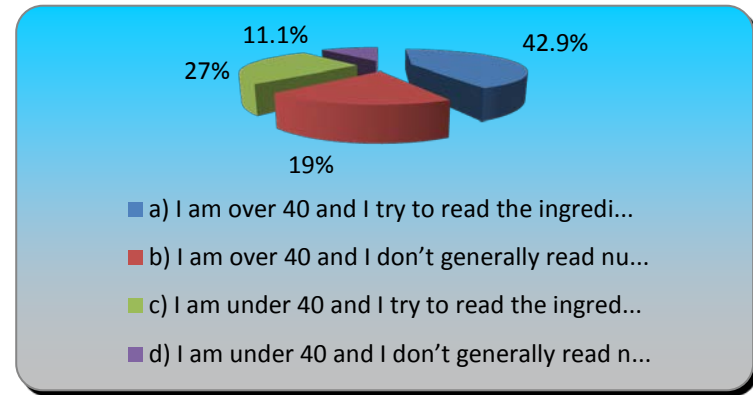
18.) Did you actually read or attempt to read the full text of the slide proceeding #TLDR, (multiple choice)

	Responses	
a) Yes – I was trying to read it.	8	15.38%
b) No – I looked at my phone or glazed over	44	84.62%
Totals	52	100%



19.) When you purchase a food that you are not familiar with which of the following is true? (multiple choice)

	Responses	
a) I am over 40 and I try to read the ingredi...	27	42.86%
b) I am over 40 and I don't generally read nu...	12	19.05%
c) I am under 40 and I try to read the ingred...	17	26.98%
d) I am under 40 and I don't generally read n...	7	11.11%
Totals	63	100%

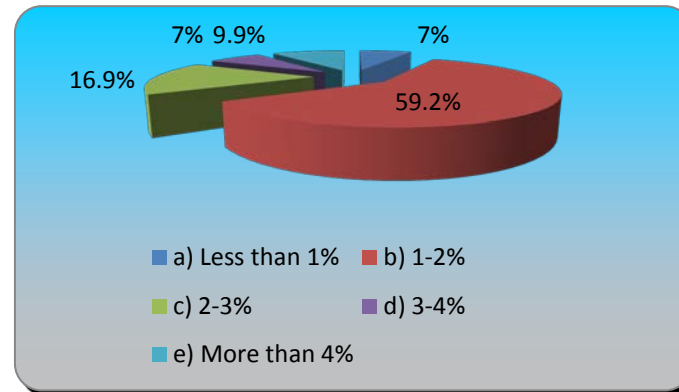


DOTS Graphical Results by Question

Session Name: PAC Day 2
Created: 10/4/2016 8:08 AM

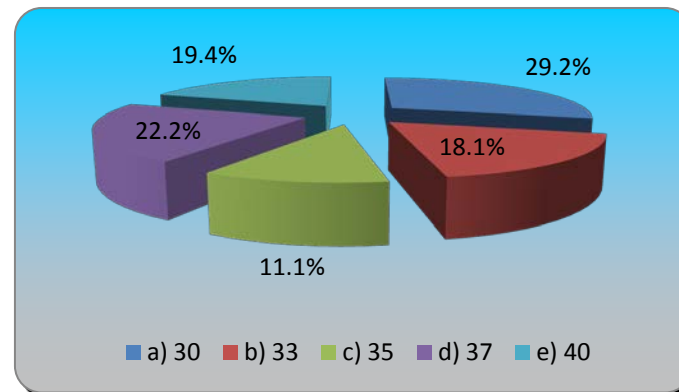
1.) What is the forecasted growth rate for the global economy for 2016? (multiple choice)

	Responses	
a) Less than 1%	5	7.04%
b) 1-2%	42	59.15%
c) 2-3%	12	16.90%
d) 3-4%	5	7.04%
e) More than 4%	7	9.86%
Totals	71	100%



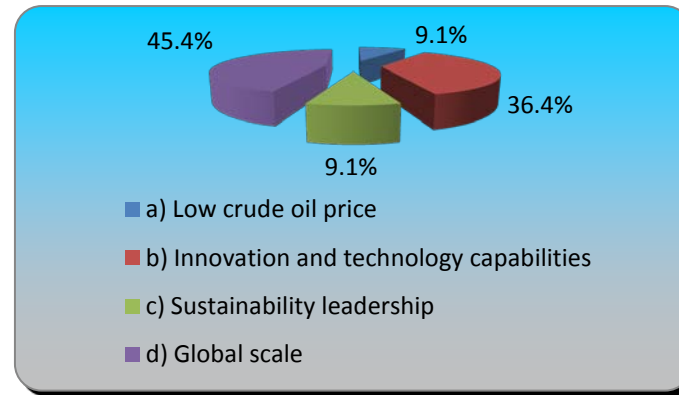
2.) What is the current age of the average Chinese worker? (multiple choice)

	Responses	
a) 30	21	29.17%
b) 33	13	18.06%
c) 35	8	11.11%
d) 37	16	22.22%
e) 40	14	19.44%
Totals	72	100%



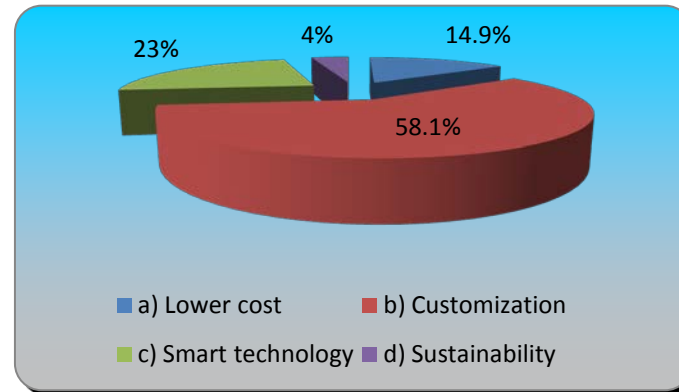
3.) What are likely to be the key factors driving larger global consolidation in the packaging industry by 2025? (multiple choice)

	Responses	
a) Low crude oil price	6	9.09%
b) Innovation and technology capabilities	24	36.36%
c) Sustainability leadership	6	9.09%
d) Global scale	30	45.45%
Totals	66	100%



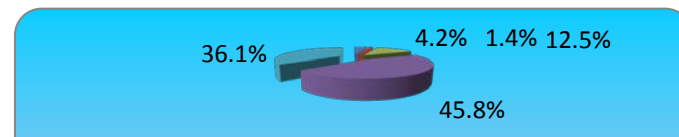
4.) What are the key trends impacting the label sector by 2025? (multiple choice)

	Responses	
a) Lower cost	11	14.86%
b) Customization	43	58.11%
c) Smart technology	17	22.97%
d) Sustainability	3	4.05%
Totals	74	100%



5.) What are the key opportunities for achieving zero waste for all packaging materials in 2025? (multiple choice)

	Responses	
--	-----------	--

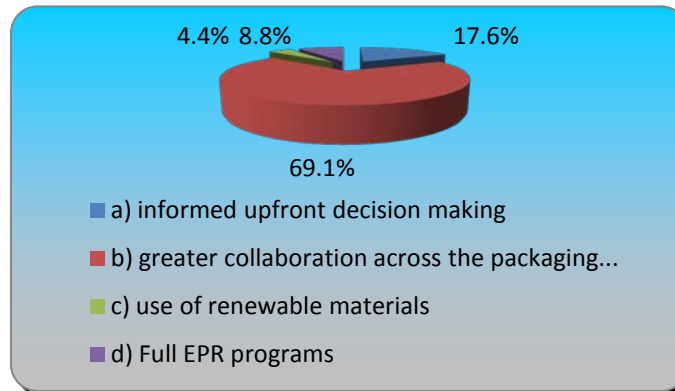


a) landfill bans	3	4.17%
b) use of renewable materials	1	1.39%
c) use of recyclable materials	9	12.50%
d) valuable end markets	33	45.83%
e) investment in recovery technology	26	36.11%
Totals	72	100%



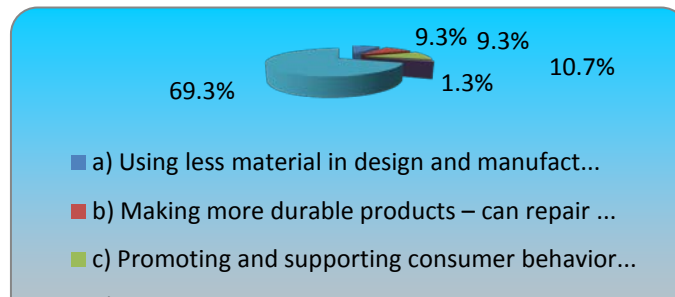
6.) What do you see as the biggest opportunities to influence package design to reduce and eliminate waste? (multiple choice)

	Responses	
a) informed upfront decision making	12	17.65%
b) greater collaboration across the packaging...	47	69.12%
c) use of renewable materials	3	4.41%
d) Full EPR programs	6	8.82%
Totals	68	100%



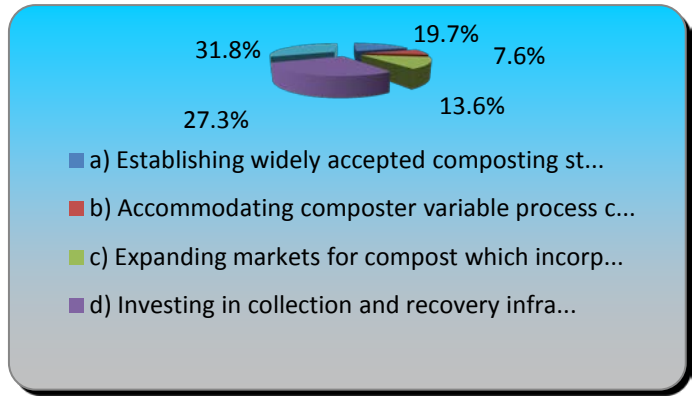
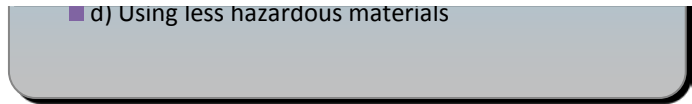
7.) What should be the most important focus for waste prevention in 2025? (multiple choice)

	Responses	
a) Using less material in design and manufact...	7	9.33%
b) Making more durable products – can repair ...	7	9.33%
c) Promoting and supporting consumer behavior...	8	10.67%
d) Using less hazardous materials	1	1.33%
e) Design for recycling and composting	52	69.33%
Totals	75	100%



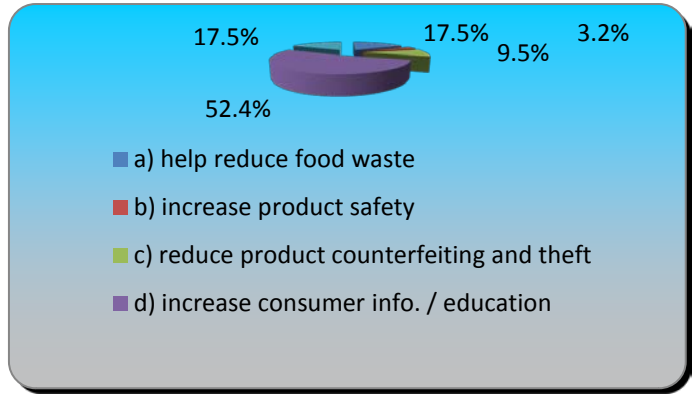
8.) What are the key challenges for compostable packaging in the waste stream through 2025? (multiple choice)

	Responses	
a) Establishing widely accepted composting st...	13	19.70%
b) Accommodating composter variable process c...	5	7.58%
c) Expanding markets for compost which incorp...	9	13.64%
d) Investing in collection and recovery infra...	18	27.27%
e) Investing in materials and composting tech...	21	31.82%
Totals	66	100%



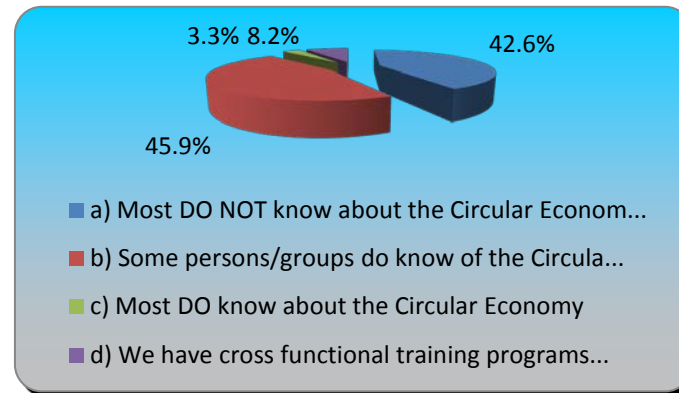
9.) What are the key benefits of smart packaging? (multiple choice)

	Responses	
a) help reduce food waste	11	17.46%
b) increase product safety	2	3.17%
c) reduce product counterfeiting and theft	6	9.52%
d) increase consumer info. / education	33	52.38%
e) increases product sales at point of sales	11	17.46%
Totals	63	100%



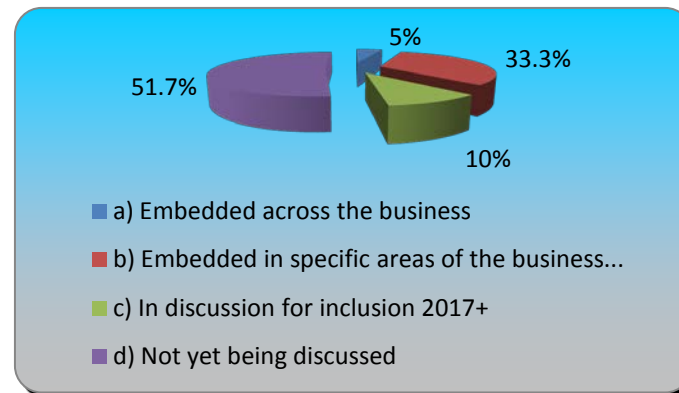
10.) Do the people in your organization understand Circular Economy and how it will influence/change the future of your products and services? (multiple choice)

	Responses	
a) Most DO NOT know about the Circular Econom...	26	42.62%
b) Some persons/groups do know of the Circula...	28	45.90%
c) Most DO know about the Circular Economy	2	3.28%
d) We have cross functional training programs...	5	8.20%
Totals	61	100%



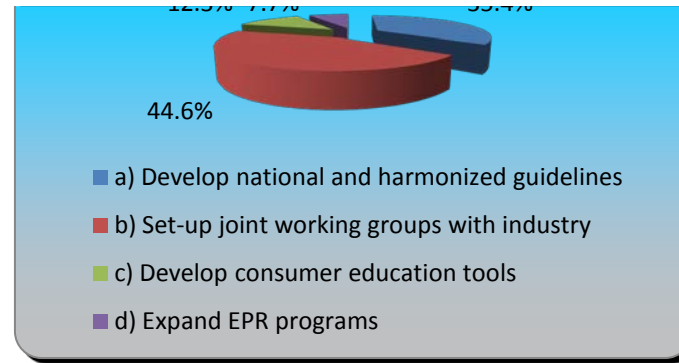
11.) Is Circular Economy thinking, or a version of systemic design, embedded into your current organization processes? (multiple choice)

	Responses	
a) Embedded across the business	3	5%
b) Embedded in specific areas of the business...	20	33.33%
c) In discussion for inclusion 2017+	6	10%
d) Not yet being discussed	31	51.67%
Totals	60	100%



12.) What should government be doing to drive the circular economy in 2025? (multiple choice)

	Responses	
a) Develop national and harmonized guidelines	23	35.38%
b) Set-up joint working groups with industry	29	44.62%
c) Develop consumer education tools	8	12.31%
d) Expand EPR programs	5	7.69%
Totals	65	100%



13.) What should industry be doing to drive the circular economy in 2025? (multiple choice)

	Responses	
a) Develop corporate goals consistent with CE...	20	33.33%
b) Commit to CE design principles for all new...	23	38.33%
c) Participate in working groups with governm...	8	13.33%
d) Develop consumer education tools	4	6.67%
e) Support EPR programs - standardize mater...	5	8.33%
Totals	60	100%

