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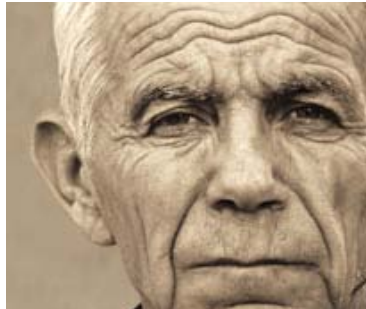
Survey reveals generation gaps on sustainability attitudes

Consumer research study taps four generations about packaging and sustainability initiatives.

-- *Packaging Digest*, 4/1/2009



Nearly 40 years ago, humorist Art Buchwald described our throwaway society with a bit of parody: "And man created the plastic bag and the aluminum can and the cellophane wrapper and the paper plate, and this was good because man could then take his automobile and buy all his food in one place and he could save that which was good to eat in the refrigerator and throw away that which had no further use. And soon, the earth was covered



with plastic bags and aluminum cans and paper plates and disposable bottles, and there was nowhere to sit down or walk, and man shook his head and cried: 'Look at this Godawful mess.'"

That "Godawful mess" has grown exponentially since 1970. But do consumers care enough to do their part to remedy the mess? Is their desire for a healthy environment in sync with manufacturers' sustainability initiatives?

To answer these key questions and provide client companies with a roadmap for sustainable branding success, The Sage Group conducted a web-based research study called, "My Views on Environmentally Friendly Packaging," and delivered it to nearly 800 multiple-generation "friends" via an email or a Facebook link and took care to use commonly understood terms. For example, the survey didn't refer to "sustainable packaging," because 89 percent of consumers don't know what it means. Queries ranged from, "What makes a company or brand environmentally friendly?" to "How does that friendliness affect purchasing decisions?"

A generational approach

The Sage Group tried to achieve a generational balance representative of the U.S. population and hit that mark by plus/minus 1 percent. The group was asked to check "all that apply" from a list of environmental practices such as assessing packages for the three Rs, choosing products based on eco-friendliness, selecting those manufactured "close to home," avoiding buying products from companies cited by the U.S. Environmental Protection Agency, etc.

When it comes to being environmentally responsible, consumers of all ages regard recycling as the

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key component of good environmental practices: "My job is to recycle; yours [manufacturer] is to make the packaging recyclable."

These results beg the question: What's your company doing to support curbside recycling? And there's also an indication that consumers need more education on the subtleties surrounding sustainability and the 3Rs (reduce, recycle, reuse). Most Millennials will recycle when it's convenient (56.8 percent). But most GenXers (69.6 percent), Boomers (67.6 percent) and Matures (89.7 percent) say they always recycle.

Packaging's impact on the environment

Do consumers realize the impact of packaging— good or bad—on the environment? Yes. Most participants feel that packaging has a major impact. Some 61.7 percent of the Millennials indicated that it has somewhat of an impact while 56.5 percent of the GenXers said it has a big impact, 58.8 percent of the Boomers indicated it has big impact and 75.9 percent of the Matures said it has big impact.

Purchasing decisions

Does the consumer's perception of the eco-friendliness of packaging affect his or her decision to purchase your product? GenXers and Matures score high in this area. They assess a package and choose products with an eye to environmental friendliness. They'll also pay a bit more for products that score high on the eco scale. One Mature participant spoke for the entire segment: "I believe in environmentally oriented anything." In contrast, Millennials acknowledge the impact of product packaging, but don't take that observation to the purchasing level. They view themselves as poor (and likely more so today), so price is their primary purchasing consideration. As one put it, "Most people like the idea of saving the environment until it hits [them in] their pocketbooks."

Some 27.4 percent of Millennials choose packaging for its eco-friendliness, followed by 11.1 percent who choose eco-friendly products and 27.2 percent who will pay more for eco-friendly products. In the GenXers category, 39.1 percent would assess packaging for its eco-friendliness, and another 39.1 percent would choose eco-friendly products while 43.5 percent would pay more for them.

Could sustainable packaging drive a soft-drink switch? This question hit close to home, and all groups were quite cautious about such a change. Millennials showed little inclination to switch brands for the greater good, unless the eco-friendly alternative were lower-priced. The other three generations were also reluctant to change, but were open to reviewing product eco information to guide their decision-making. Only the Matures were inclined to make the change—even at a higher cost. Responses to this question underscored the importance of education in helping consumers make the right decisions for the right—and real—reasons.

Participants also were asked about the possible role a company's ethics might play in their product choices. Most participants avoid buying from a company that scores on the low end of the ethics scale. But if the product pull is strong enough, Millennials would heed its call, regardless of the maker's reputation.

Perception equals reality

Without prompts, we asked participants what kinds of packaging they view as eco-friendly and what they don't. Most don't know if a bottle or container is made of PET or HDPE, but can tell if a plastic bottle is lighter-weight and which products seem over-packaged. Most seem to soak up product environmental information. But their perceptions of "good" and "bad" packaging and their own role as recyclers call into question their knowledge of what types of packaging are universally recyclable and which are not. They certainly aren't aware of all elements that comprise sustainability. Education must be the mantra in any sustainability initiative.

Greenies vs wannabees

Participants showed no reluctance in naming companies they consider truly "green" and those they believe are greenwashers. Surprisingly, various foreign and U.S. auto manufacturers scored high on the green scale. Several big-box retailers, organic food purveyors and manufacturers of organic products also received the green stamp of approval. On the greenwasher side, two petroleum companies and some computer hardware manufacturers were cited, likely due to the perceived negative environmental impact of their packages or practices. If the wannabees change their errant ways, the news isn't reaching consumers. It can take a year or more of concerted communication for a "reformed" company with environmental or ethical baggage to turn consumer perceptions around.

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So what? Key takeaways

These findings cover all four generations:

- They believe they can have a significant impact on the environment.
 - They seek data on the environmental impact of a product and its packaging on which to base purchasing decisions.
 - They view "hard-packaging" and over-packaging as environmentally destructive.
 - They're unaware of the sustainability nuances of the various types of packaging materials (plastic is bad, glass is good, reused materials are good, etc.).
 - To them, sustainable packaging is recyclable packaging. Period.
 - They avoid buying from companies they perceive as having a bad reputation—ethically or environmentally.
 - They recognize greenwashing when they see it. Authenticity and transparency are essential to them.

Most importantly, the entire group sees a company, its brands, products and packaging as one and the same. This validates the sustainability approach adopted by the green front-runners: Sustainability is not a trend. It's a cultural keystone and a key attribute that must permeate the organization.

Age range	% U.S. population
17-25 years	Millennials 32%
26-40 years	GenXers 20%
41-55 years	Boomers 28%
56+ years	Matures 20%

Author Information

Elin Raymond is president of branding/marketing firm The Sage Group, Inc. Next month, Raymond will drill down into the generational impact of the study's findings on sustainable branding and marketing. For more information, contact Raymond at eraymond@sagegrp.com, 612/321-9897 or www.sagegrp.com.

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