



FPA Flexible Packaging
Association

Connecting. Advancing. Leading.



SUSTAINABILITY OUTREACH AND CONSUMER CONVERSATIONS

FPA Flexible Packaging Brand Owner and Consumer Sustainability Study

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INTRODUCTION

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The flexible packaging industry has an **opportunity to engage in sustainability outreach and drive consumer conversations** as they relate to the life cycle impacts and advantages of flexible packaging.

The Flexible Packaging Association (FPA), the US trade association for converters of flexible packaging and suppliers to the industry, commissioned the 2018 Sustainability Study to **better understand perspectives on sustainability and packaging among both consumers and brand owners**. The study integrates insights from brand owners surveyed online in June 2018 by *Packaging World*¹ and insights from an online survey of U.S. consumers conducted by The Harris Poll in July 2018². Both surveys were conducted on behalf of FPA.



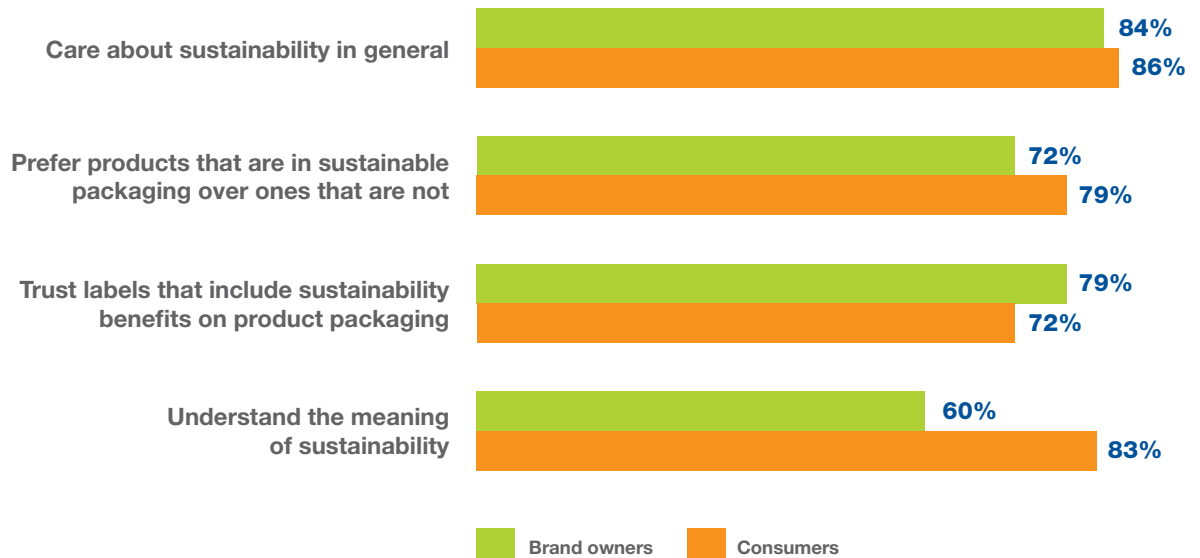


CONSUMER SUSTAINABILITY PERSPECTIVES

CONSUMER SUSTAINABILITY PERSPECTIVES

In the 2018 Sustainability Study, brand owners accurately identified consumers' perspectives on sustainability. However, there is a discrepancy between consumers who say they understand the meaning of sustainability and brand owners who question consumer understanding of the concept. This skepticism from brand owners creates an opportunity for them to educate consumers on the complete picture of sustainability.

Brand owners are generally in tune with consumers' viewpoints of sustainability, yet disagree on their understanding of sustainability.



BRAND OWNER Q:

"In your opinion, do you feel that consumers..." (Percent who Somewhat Agree or Strongly Agree)

Packaging World survey of brand owners¹

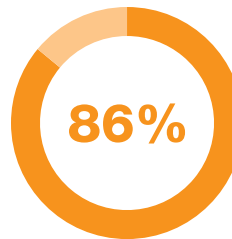
CONSUMER Q:

"How much do you agree or disagree with each of the following statements about sustainability?" (Percent who Somewhat Agree or Strongly Agree)

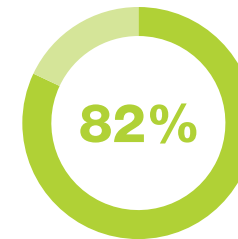
FPA survey conducted by The Harris Poll²

CONSUMER SUSTAINABILITY PERSPECTIVES

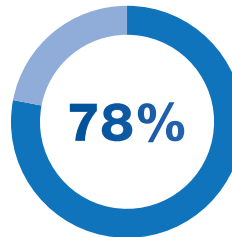
Consumers say that sustainability is important in general and as it relates to packaging.



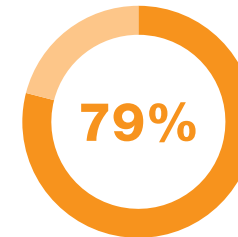
say they care about sustainability in general



say they care about sustainability aspects of packaging



say they support/buy from businesses with sustainability initiatives



say they prefer products that are in sustainable packaging over ones that are not

**Percentages based on summary of those who strongly agree or somewhat agree with statements.*

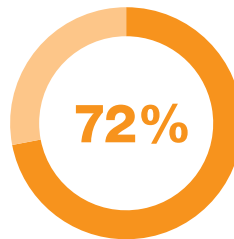
FPA survey conducted by The Harris Poll²



UNDERSTANDING PACKAGING LIFE CYCLE IMPACTS

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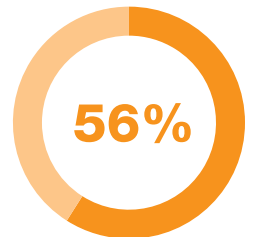
The majority of brand owners believe that consumers care about the sustainability aspects of packaging materials. However, brand owners are split on whether or not consumers care about the sustainability aspects of packaging processes.



believe consumers care about the sustainability aspects of packaging **materials**

vs.

believe consumers care about sustainability aspects of packaging **processes**



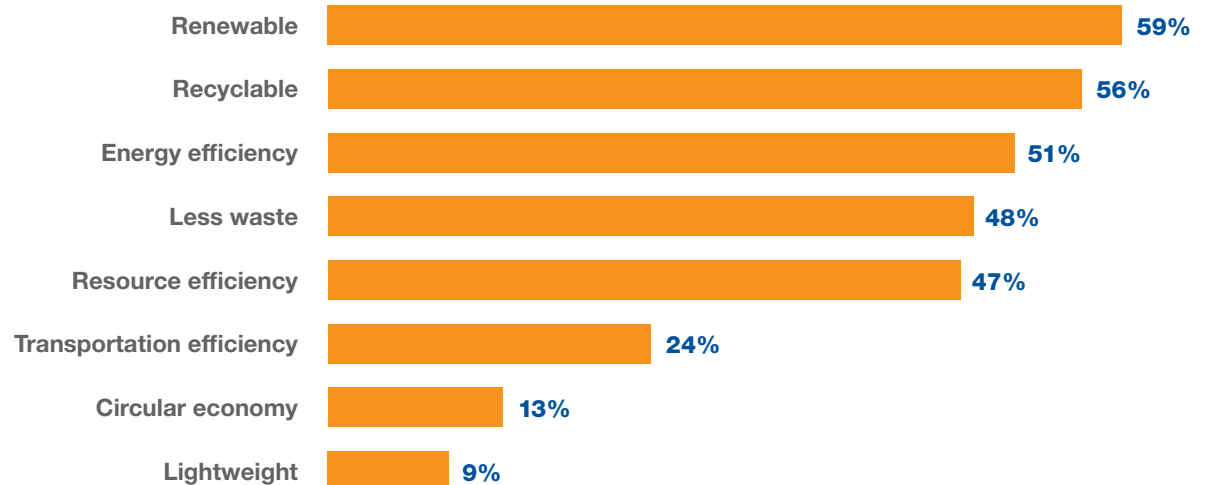
Packaging World survey of brand owners¹



UNDERSTANDING PACKAGING LIFE CYCLE IMPACTS

Given a list of phrases that relate to sustainability, a majority of consumers associate sustainability with terms like “renewable” and “recyclable” that have been part of the consumer lexicon for years. They may not be readily familiar with specific lifecycle packaging impacts, but when presented with them, consumers recognize their importance. For example, only 24% of consumers say transportation efficiency describes sustainability, yet 81% think it’s at least somewhat important that product packaging has been transported efficiently.

The full lifecycle impacts of packaging are not always top-of-mind for consumers.



*“Which of the following terms do you believe best describe sustainability?” Select all that apply.**

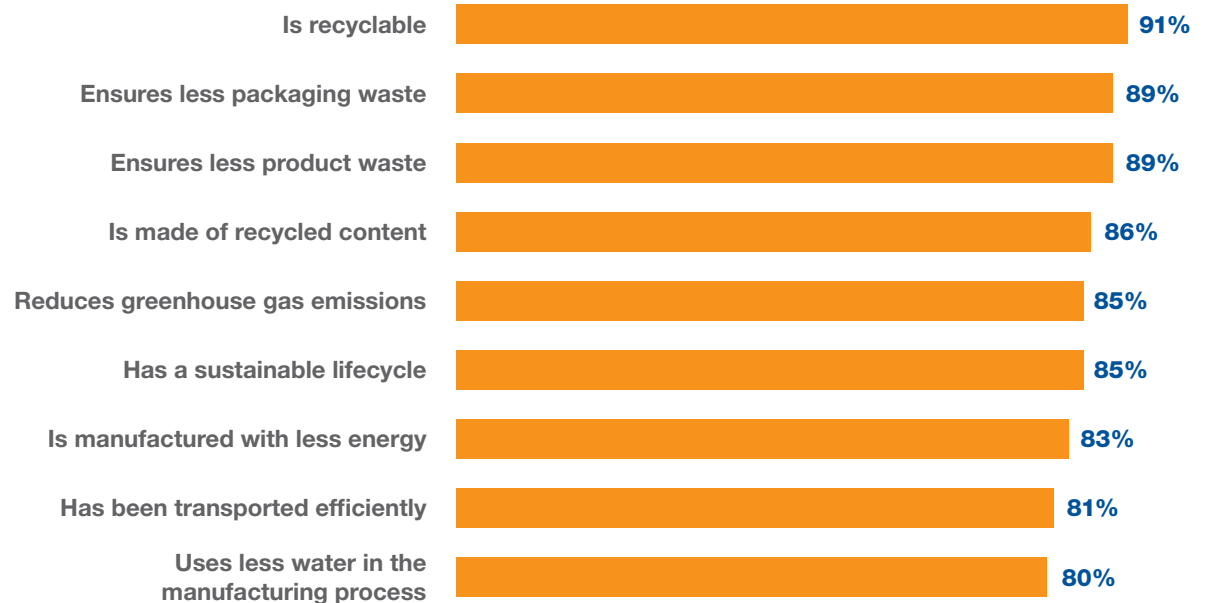
FPA survey conducted by The Harris Poll²

*Only a select number of responses are shown.

UNDERSTANDING PACKAGING LIFE CYCLE IMPACTS



When presented with full lifecycle packaging impacts, consumers recognize the importance. There is an opportunity to elevate the visibility of specific sustainable manufacturing processes and supply chain concepts in the sustainability conversation among consumers.



“Thinking about the products you buy, how important is it to you that product packaging...” (Summary of “at least somewhat important”)

FPA survey conducted by The Harris Poll²



THE MILLENNIAL OPPORTUNITY

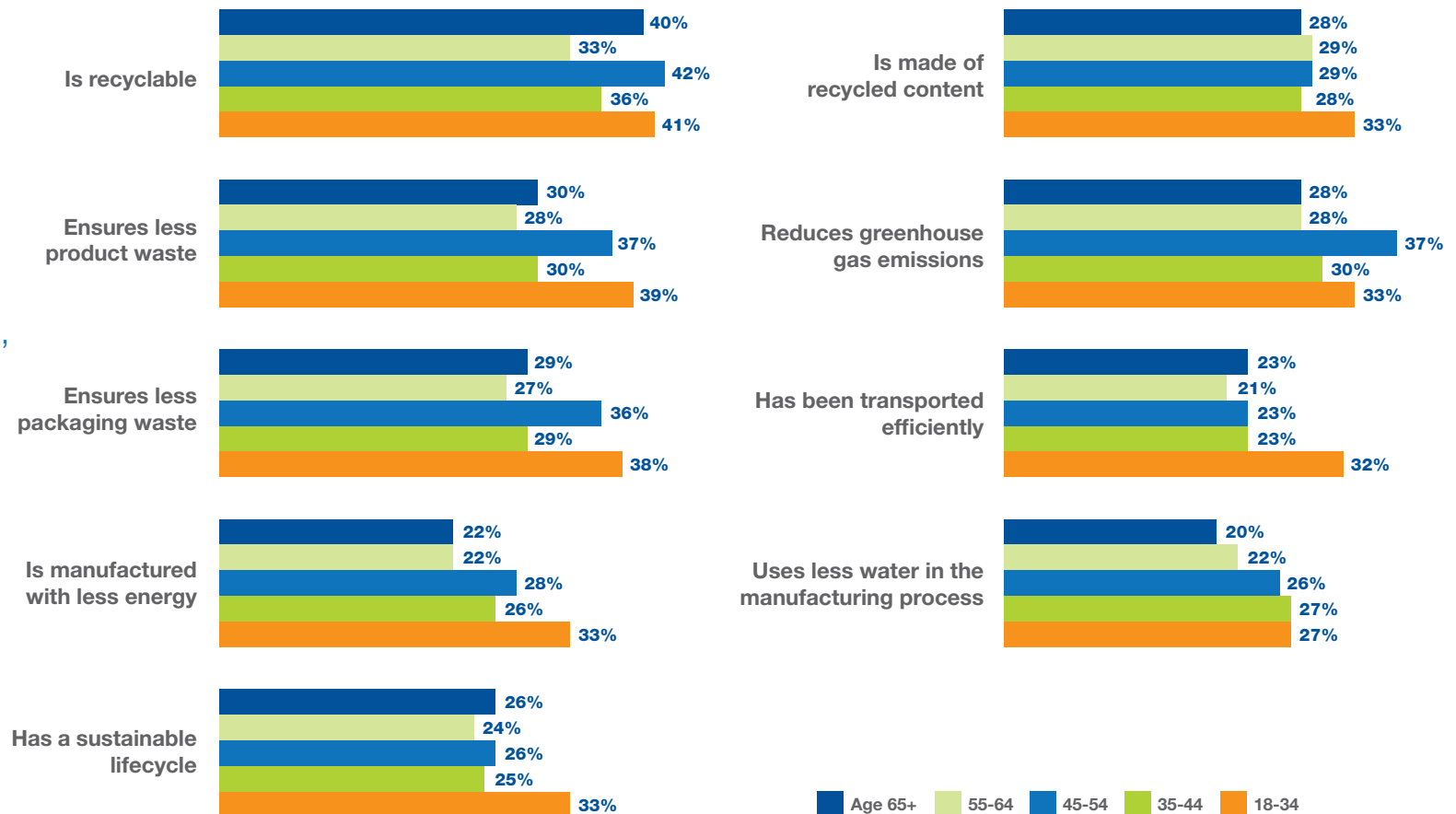
THE MILLENNIAL OPPORTUNITY

Millennials, ages 18-34, are more likely than other age groups to say it is “absolutely essential” or “extremely important” that product packaging has a sustainable lifecycle (33% vs. 25% of consumers ages 35+), is manufactured with less energy (33% vs. 25% of consumers ages 35+)*, and has been transported efficiently (32% vs. 22% of consumers ages 35+). Given their enthusiasm and future buying power, it will remain important to monitor this group’s impact on sustainability trends.

Millennials are more likely than other generations to think some of the more “behind-the-scenes” benefits of sustainability, such as efficient transportation, are important.

“Thinking about the products you buy, how important is it to you that product packaging...”
(Summary of people who rated attributes as **Absolutely Essential or Extremely Important**)

FPA survey conducted by Harris Poll²

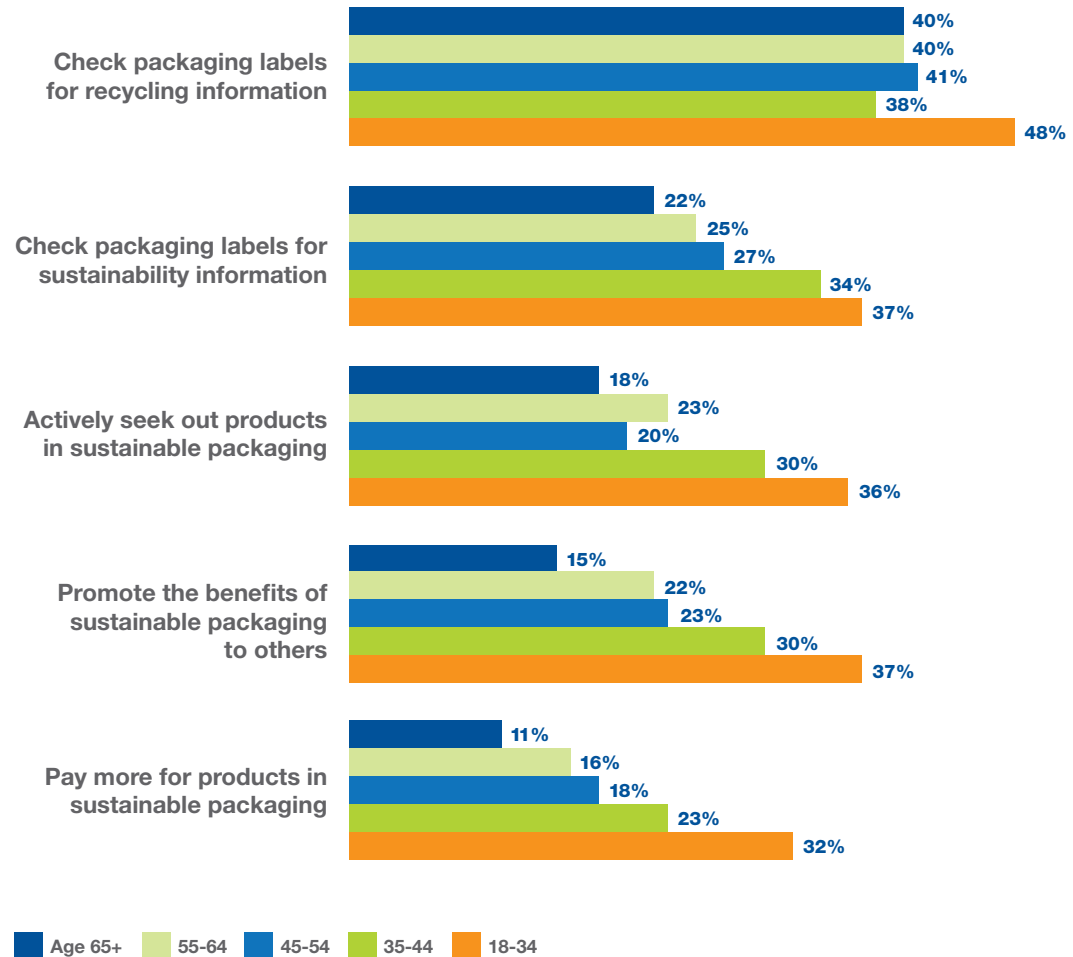


*The difference is notable, but not statistically significant.

THE MILLENNIAL OPPORTUNITY

When it comes to taking action, Millennials, ages 18-34, and their slightly older counterparts, ages 35-44, are more likely than members of other generations to say they always or often actively seek out products in sustainable packaging (34% ages 18-44 vs. 20% ages 45+), promote the benefits of sustainable packaging to others (35% ages 18-44 vs. 20% ages 45+), or check packaging labels for sustainability information (36% ages 18-44 vs. 25% ages 45+). Millennials are unique in that they are more likely than all other age groups to check packaging labels for recycling information.

Younger generations are more likely to regularly take the following actions related to packaging sustainability.



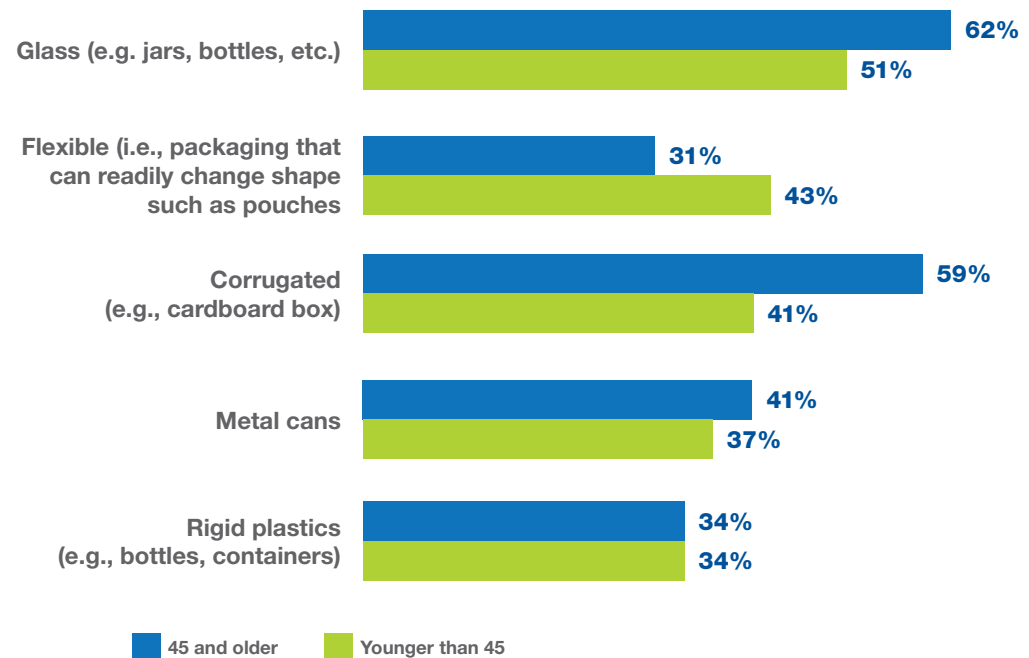
“How often do you do each of the following?” (Summary of Always or Often)

FPA survey conducted by Harris Poll²

THE MILLENNIAL OPPORTUNITY

Flexible packaging companies have an opportunity to grow with younger generations' emphasis on package sustainability. Younger generations of consumers (ages 18-44) are more likely than older generations (ages 45+) to believe that flexible packaging is sustainable (43% vs. 31%) and less likely to think glass (51% vs. 62%) and corrugated (41% vs. 59%) packaging are sustainable. Continuing to highlight the specific lifecycle benefits of flexible packaging is critical for business growth as it is expected to resonate with the Millennial generation.

Younger generations, ages 18-44, are more likely to view flexible packaging as sustainable compared to those 45+.



"Which of the following types of packaging do you believe are sustainable?" Select all that apply.

FPA survey conducted by Harris Poll²

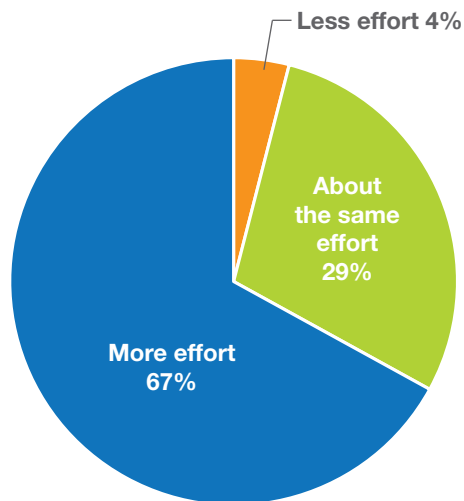


BRAND OWNER PRIORITIES

BRAND OWNER PRIORITIES

Sustainability is a priority for the majority of brand owners, and packaging plays a key role in their sustainability efforts.

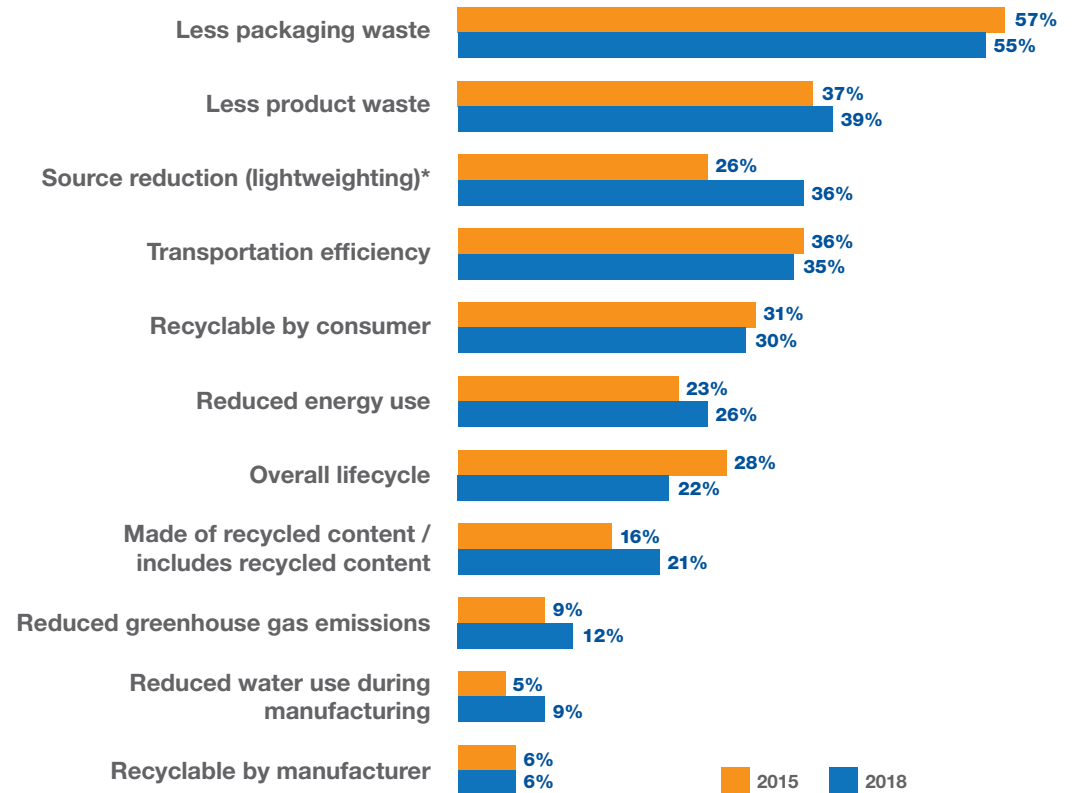
The majority of brand owners indicate their company has put forth more effort with regard to sustainability in the past five years.



"How has your company's sustainability efforts changed in the past five years?"

Packaging World survey of brand owners¹

Compared to trends in the 2015 Brand Value Study conducted by FPA, company sustainability goals have remained fairly consistent, although lightweighting notably increased in importance.



"Which THREE of the following factors are MOST important to your company's sustainability goals?" (Respondents could choose up to three answer choices)

Packaging World survey of brand owners¹

*Answer choice changed from "source reduction" in 2015 to "source reduction (lightweighting)" in 2018.

BRAND OWNER PRIORITIES

Brand owners identified price and quality as top barriers to increasing sustainability efforts at their organizations. Given the focus on price and quality, there is an opportunity to educate brand owners about flexible packaging as a solution to meet these sustainability needs.



Results show failure to identify alternatives of equal or less price and equal or better quality are among the top challenges at organizations.



*“Which **THREE** of the following are the biggest barriers to increasing sustainability efforts at your organization?” (Respondents could choose up to three answer choices)”*

Packaging World survey of brand owners¹

METHODOLOGY AND INFORMATION SOURCES

¹*Packaging World* Survey of brand owners

The Flexible Packaging Association (FPA) commissioned *Packaging World* to conduct a cross-industry survey in July 2018. More than 500 packaging professionals were surveyed for the analysis, representing food and beverage, healthcare/pharmaceutical, personal care, consumer product, industrial, and other industries. Those surveyed represent package developers, package machinery engineers, procurement executives, brand managers, package designers, consultants, and sales representatives. Respondents were surveyed about sustainability and packaging.

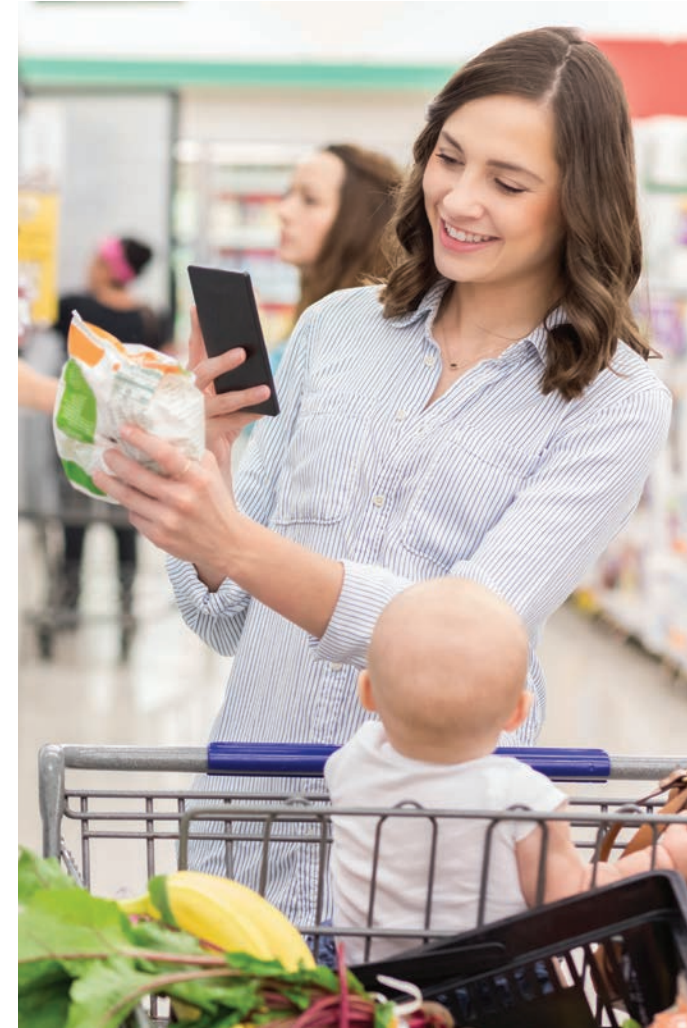
Respondents who identified themselves as packaging suppliers were filtered out of the results. This resulted in a net total of 349 product users for analysis.

²FPA Survey Conducted by Harris Poll

This survey was conducted online within the United States by The Harris Poll on behalf of FPA from July 10-12, 2018, among 2,012 U.S. adults ages 18 and older. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

³Brand Value Study

The FPA Brand Value Study integrates primary research of consumers, brand owners and industry members, plus input from secondary research, into one study. The data includes insights from brand owners surveyed online in August 2015 by *Packaging World* magazine, insights from consumers surveyed online in September 2015 by The Harris Poll, and insights from FPA members interviewed by Gibbs-rbb in 2015.





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For more information about flexible packaging and this study, visit www.flexpack.org.

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