



Waking the Sleeping Giant

*What Middle America knows about plastic waste
and how they're taking action
June 19, 2019*

Introduction and Methodology

- As part of its ongoing polling of Americans to deeply understand their beliefs and expectations around sustainability, Shelton Group fielded a special-topic Pulse® poll to better understand whether or not average Americans are really beginning to catch on to the plastic waste issue. Specifically, we wanted to understand:
 - Are they aware? Are they seeing all the press, the National Geographic covers, the YouTube videos?
 - Are they frustrated with themselves...brands...plastics makers...lawmakers? And what will they soon be demanding – who do they think should solve this problem?
 - Will they begin seeking out products not packaged in plastics? Will they shun brands that use plastic packaging? Will they demand that their lawmakers impose bans? Will they get loud on social media the way they have for other social issues?
- An online survey was fielded in March of 2019, surveying a total of 1,013 U.S. respondents.
- Stratified sampling mirrors the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 3.1%.

As the YouTube view counts make clear,
Americans are, indeed, aware.

OCEAN RESCUE S5 • E16

Whale dies after swallowing 80 plastic bags

53,720 views

172

23

Haunting Dead Whale Has Washed Up in Manila. Wait till you see what washed up WITH the whale

4,877,539 views

Footage of whale who died after eating plastic bags

462,518 views

886

234

17 Pounds of Plastic Waste Kills Pilot Whale | National Geographic

94,412 views

1.8K

78



In fact,

80%

of Americans say they've heard at least a little about bans on single-use plastics

Gain a sustainable advantage.

A photograph of a clear plastic bag floating in the ocean. The bag is partially submerged, with a large, crumpled portion hanging below the water's surface. The water is a deep blue, and the sky is a lighter blue. In the distance, a small white bird is flying in the sky, and a range of low mountains is visible on the horizon. The overall scene is a metaphor for environmental pollution, specifically plastic waste in the ocean.

And when asked which environmental issues they're hearing about the most – from news, social media, family and friends – plastics in the ocean is now on par with climate change.

AWARENESS

OCEAN PLASTIC

5

7

-

CLIMATE CHANGE

5

9



What's more telling, though, is that concern about plastics in the ocean edges out concern about climate change.

We asked, “When you think about the future of our planet, how concerned are you about each of these issues?” and listed 10 different environmental issues. Plastics in the ocean came out on top – ahead of climate change, even though, arguably, climate change is the bigger issue of the two.

CONCERNED

OCEAN PLASTIC

6

5

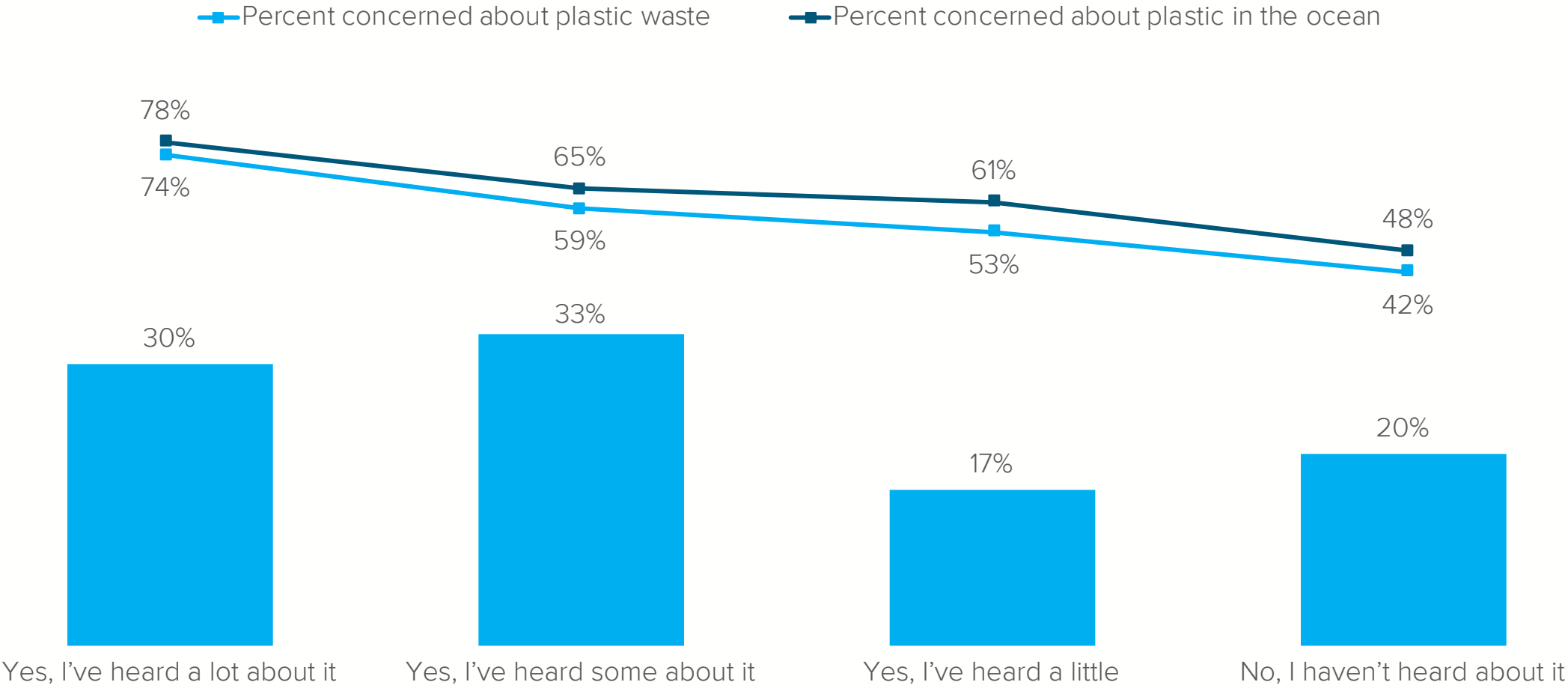
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CLIMATE CHANGE

5

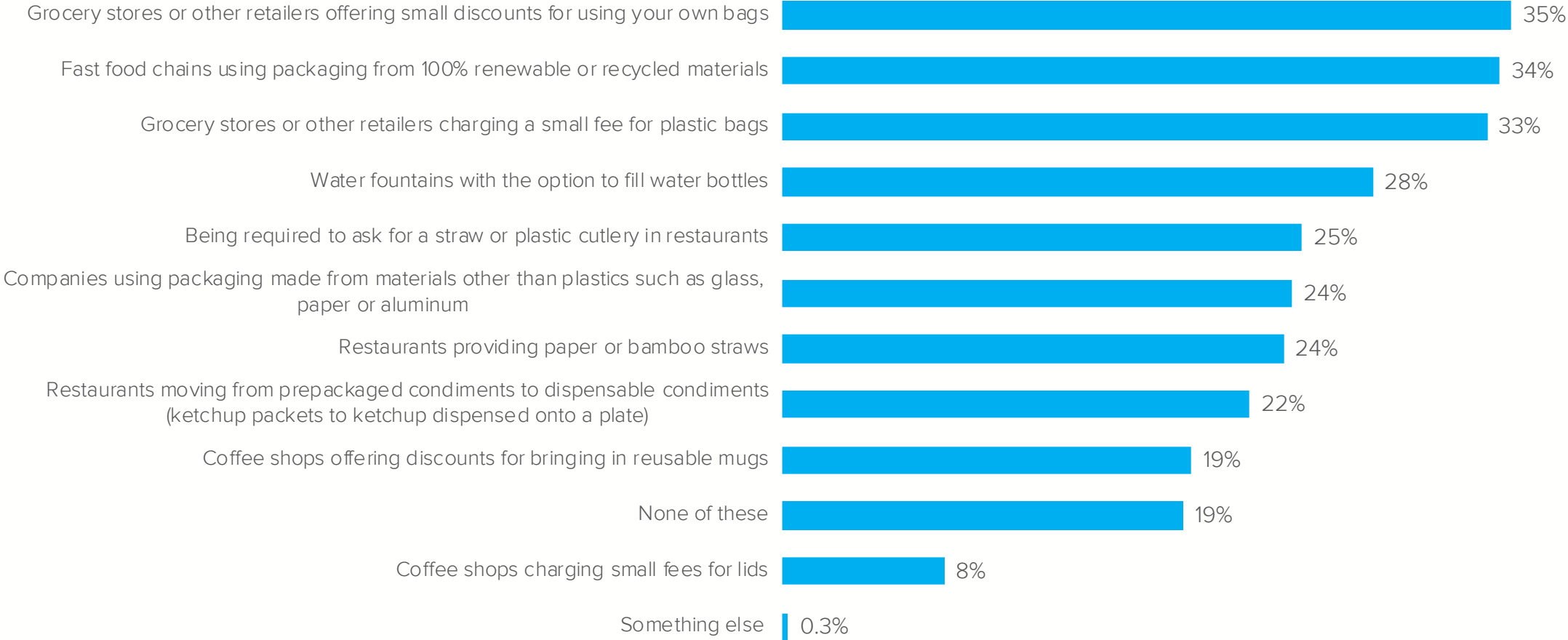
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And they're correlated: As awareness of plastic bans increases, so does concern about plastics



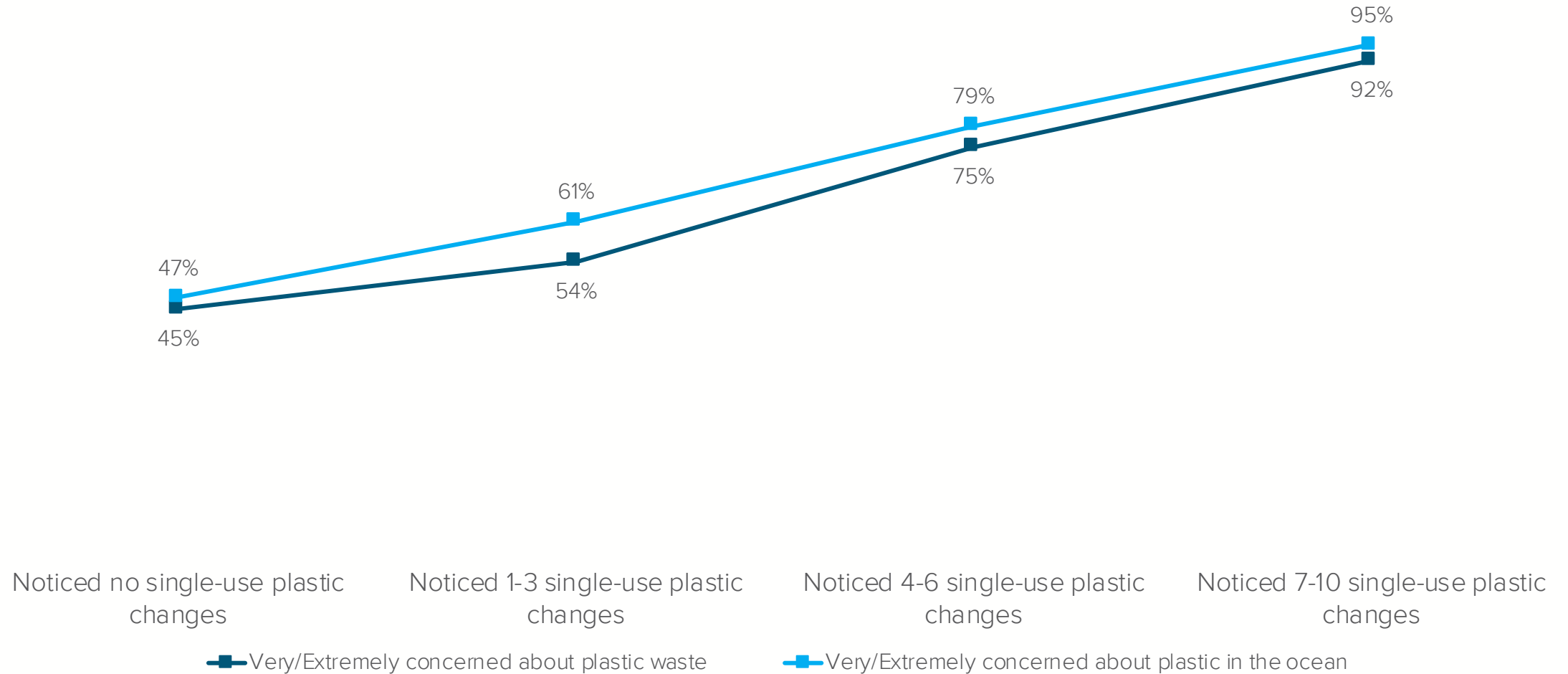
When retailers, restaurants and brands minimize plastic use, it has an impact on perception.

Grocery bags and fast food packaging are the areas in which they've noticed the most changes related to single-use plastic



n=1,013

The more single-use plastic changes they have noticed, the more concerned they are about plastic waste



Q6 - Which of these changes related to single-use plastics have you noticed as you go about your daily life?

Q2 - When you think about the future of our planet, how concerned are you about each of these issues? Plastic waste, Plastic in the ocean

n=1,013

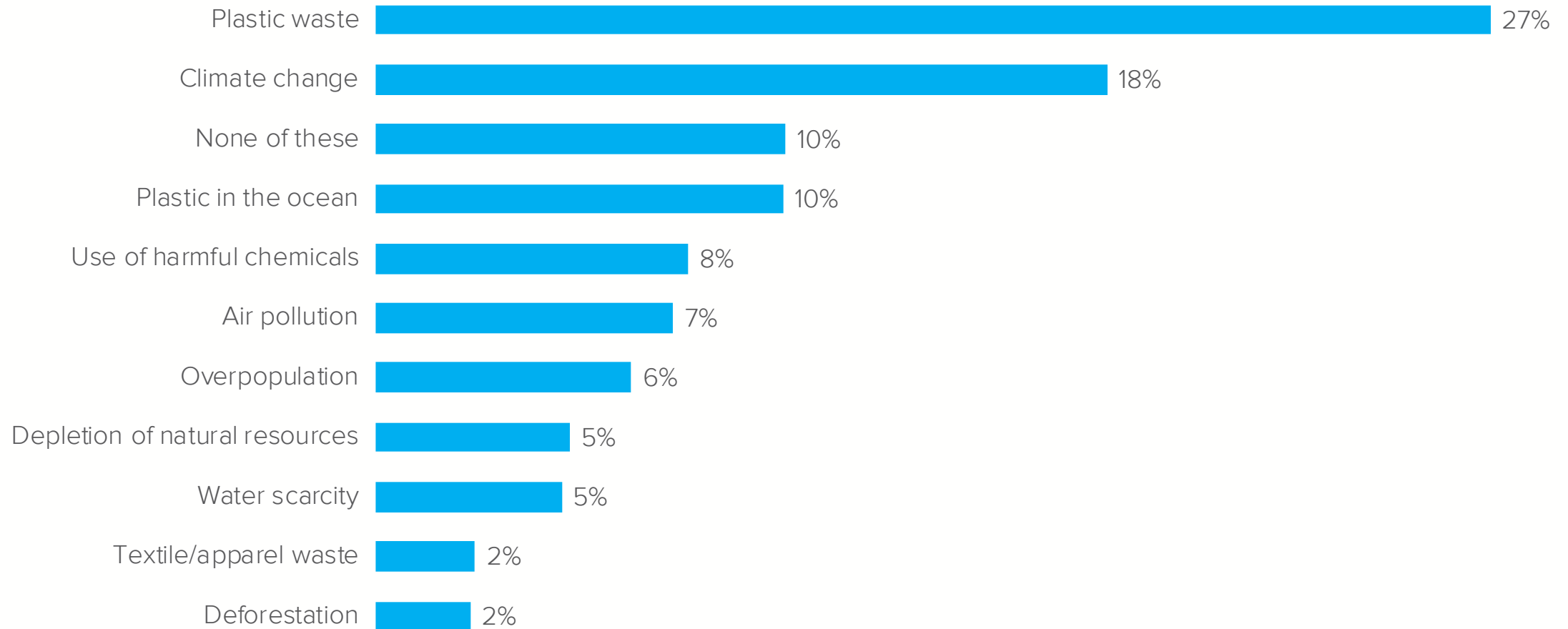
So they're aware and concerned about plastics in the ocean.

What are they doing about it? And what do they expect brands, retailers and regulators to do about it?

First, it's important to note that roughly a third of Americans are beyond Aware. They're Activated.

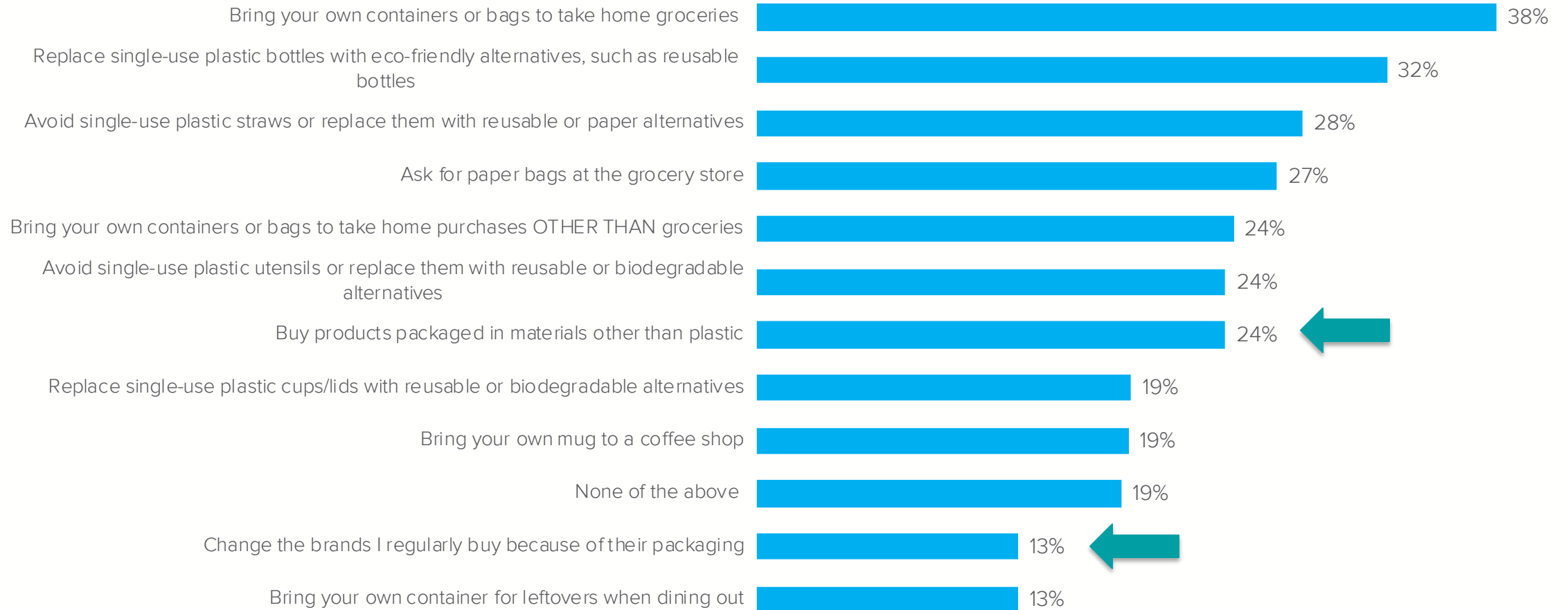
ASLEEP, 31%	AWARE, 36%	ACTIVATED, 34%
More likely to live in the South or Midwest	Geographically representative	Somewhat more likely to live in the West
More likely to be female: 57% women, 43% men	More likely to be male	55% female 45% male
Age 45-64 / Gen Xers	Even distribution throughout age groups	Age 25-34 / Millennial
Significantly more likely to be unemployed	Somewhat more likely to be a part-time employee	More likely to have full-time employment
Predominantly Caucasian, but somewhat more likely to be African-American	Predominantly Caucasian	Predominantly Caucasian
High school graduate or less education	42% high school graduate or less	Highly educated with a bachelor's degree or higher
Less likely to be a homeowner	More likely to be a homeowner	More likely to be a homeowner
Less than \$25,000 a year	More likely to have \$100,000+ annual income	More likely to be \$75,000+
37% Democratic 28% Republican 27% Independent 9% Other	36% Democratic 32% Republican 29% Independent 4% Other	46% Democratic 22% Republican 29% Independent 4% Other
30% kids in the home	30% have kids in the home	32% kids in the home
More likely to have never been married 39%	31% never married 47% married	More likely to be married
Less likely to understand what single-use plastic means	66% say they understand what single-use plastic is	Significantly more likely to say they understand what single-use plastic is, and they believe it is harmful to their health, bad for business, and undesirable
They don't think plastic waste is a problem and they haven't changed their habits yet and aren't likely to do so	They are going along with changes others have made regarding plastic waste but haven't made major changes in their habits yet	They have heard a lot about plastic waste, feel they can impact it and they are actually doing things about their behavior

Plastic waste is the issue Americans feel they can impact the most



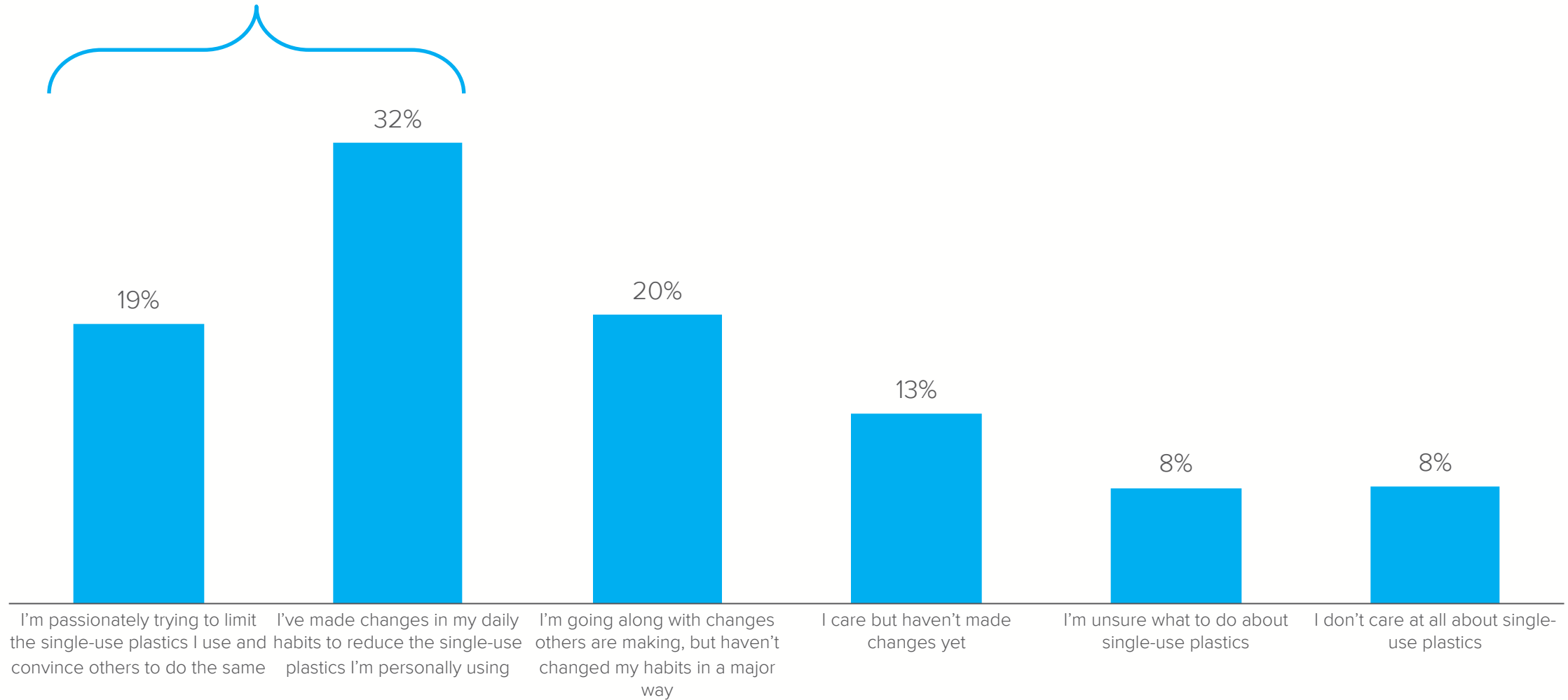
n=1,013

While bringing one's own bags to the grocery store is the most common action, some are trying to stay away from plastic packaging



n=1,013

Half say they've made changes in their lives already around single-use plastic; only 8% don't care



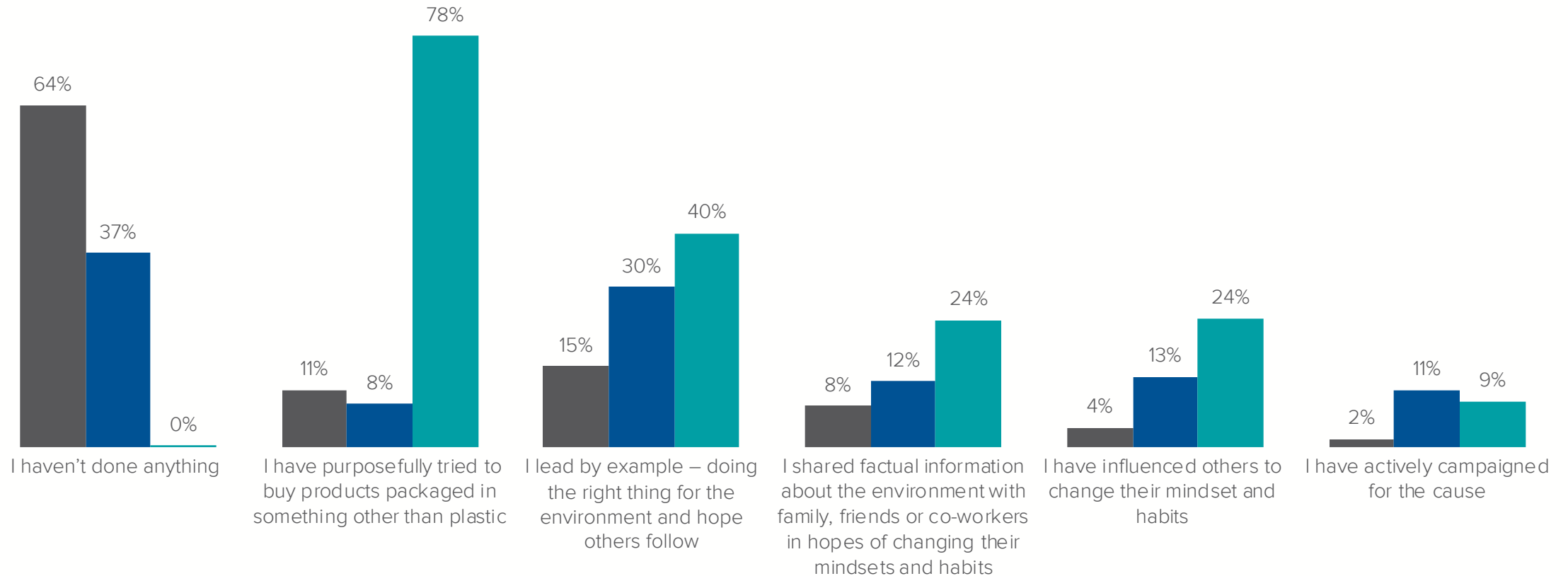
n=1,013

1/3

of Americans say that in the last 3 months they've actively tried to buy products packaged in something other than plastic.

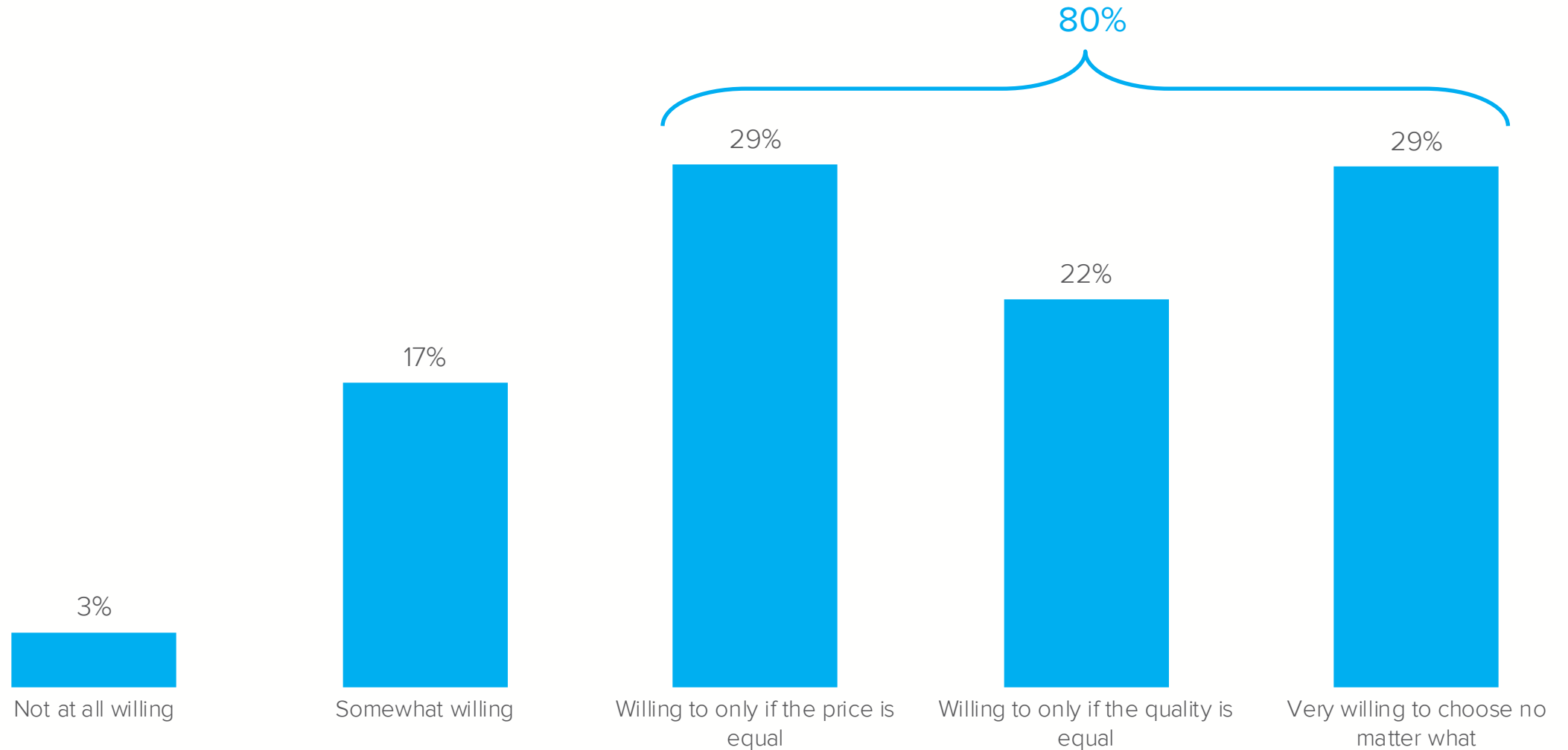
And the vast majority of Activated Americans have consciously purchased non-plastic packaging

■ Asleep ■ Aware ■ Activated



n=1,013

Americans say they're willing to choose products packaged in other materials, sometimes regardless of price or quality parity



Q9 - When you have a choice, how willing are you to choose products packaged in other materials (glass, paper or aluminum) over plastic products?

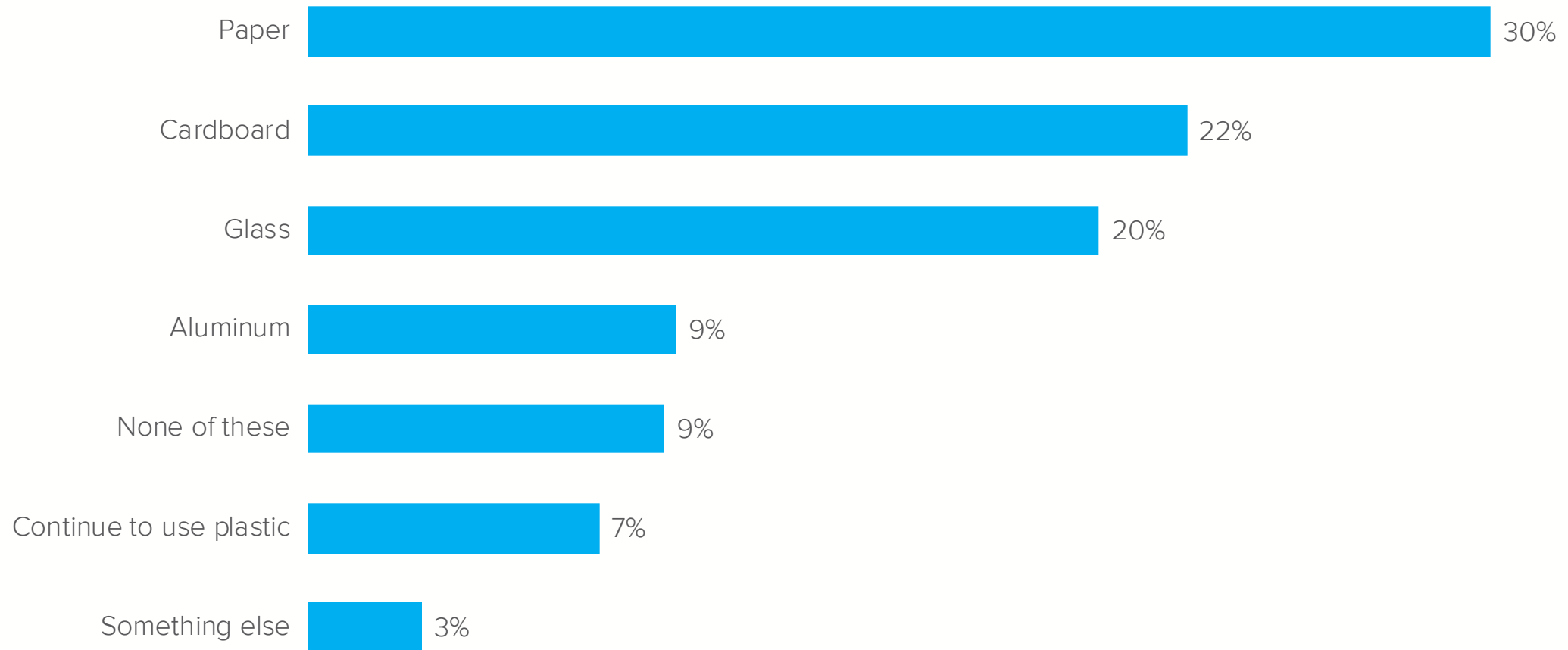
n=1,013

Gain a sustainable advantage.

So, what packaging do they prefer? Generally, they think paper is the better option.



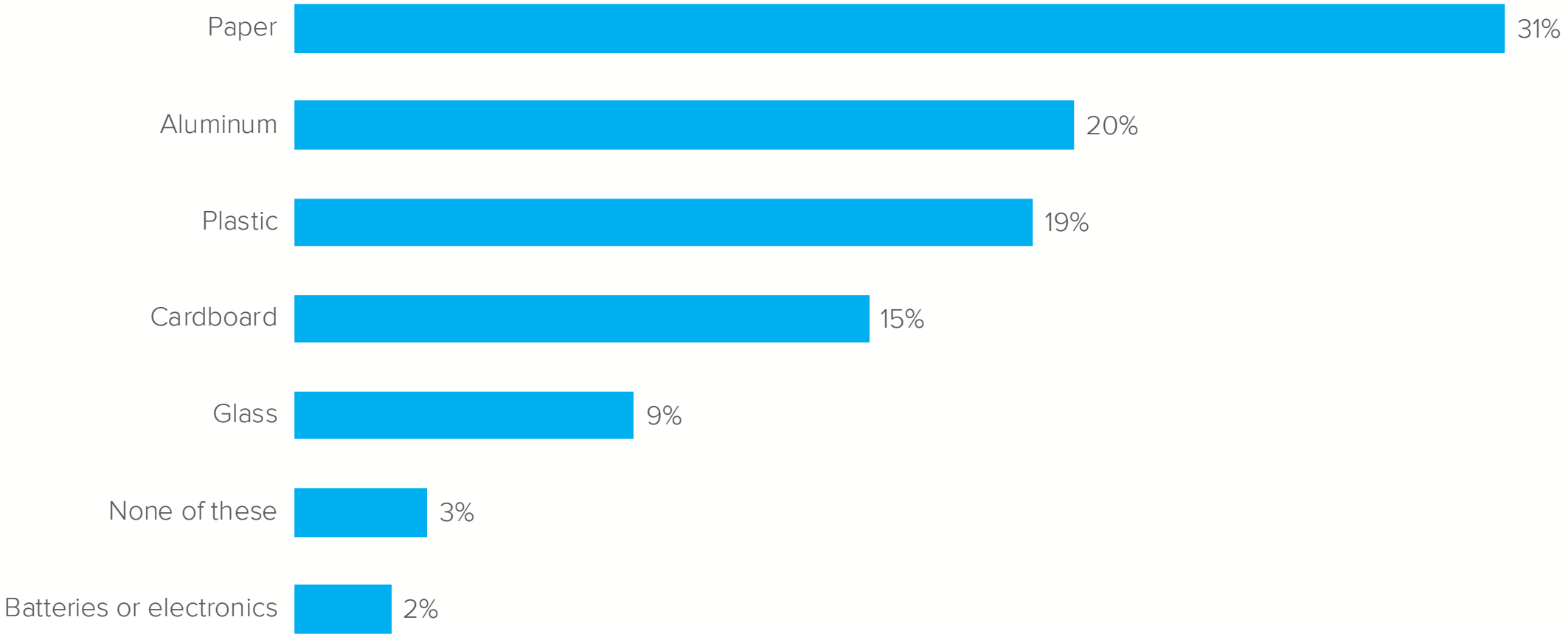
Paper rises to the top as the best alternative to plastic



Q13 - If a brand that typically packages their product in plastic was rethinking its packaging materials, what ONE material do you think it should use instead?

n=1,013

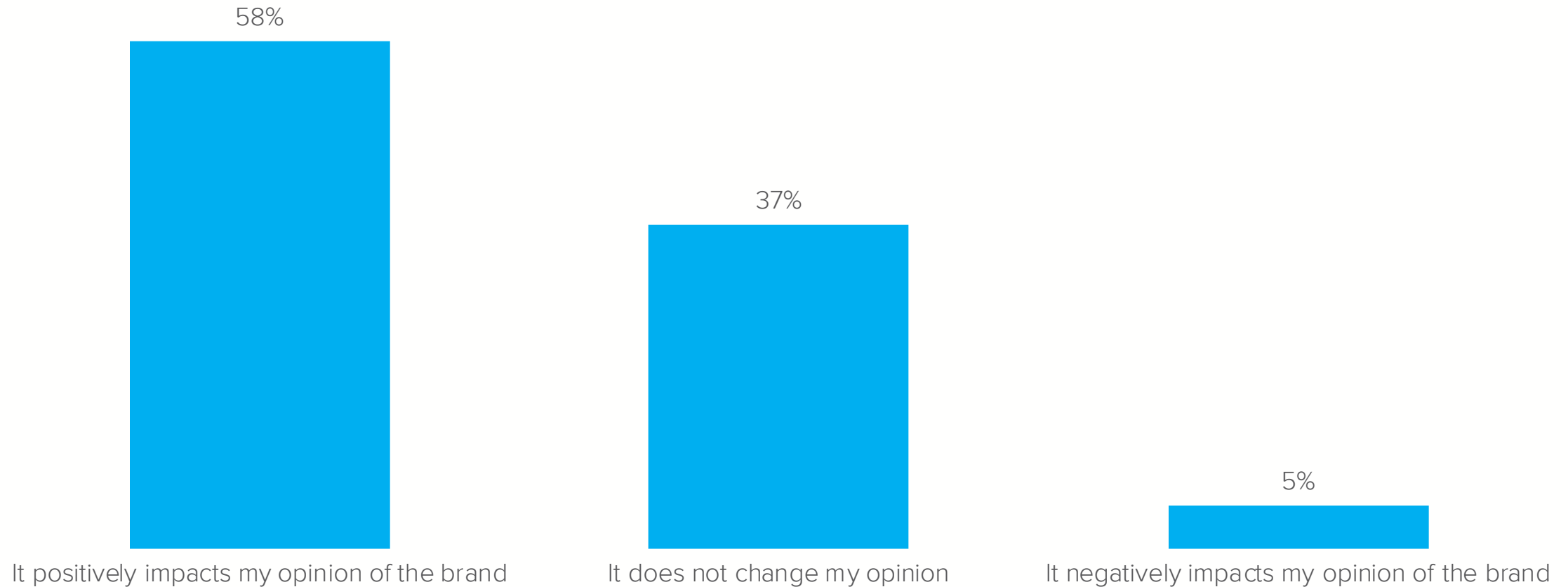
Americans also believe paper is the easiest for recycling centers to process




n=969

There are both opportunities
and threats for brands here.

Opportunity: The majority view a brand that limits plastic used in packaging more positively. So, if you can provide packaging material options, it's a win for brand favorability.



n=1,013

A person with dark hair in a ponytail, wearing a light blue denim shirt, is seen from behind in a grocery store aisle. They are standing in front of shelves filled with various packaged goods. A semi-transparent white text box is overlaid on the center of the image.

The threat lies in how Americans, especially Activated Americans, may feel when they try to shop without buying any single-use plastics and realize it's currently virtually impossible.

We believe those
folks will feel

Trapped Defeated Guilty

And brands don't create campaigns designed to elicit those emotions

Creative Brief

Objective: create brand affinity by making target audience feel trapped, defeated and guilty.

When we ask, “Who’s responsible for policing the production and use of single-use plastics?” the responsibility is fairly evenly split.

Government

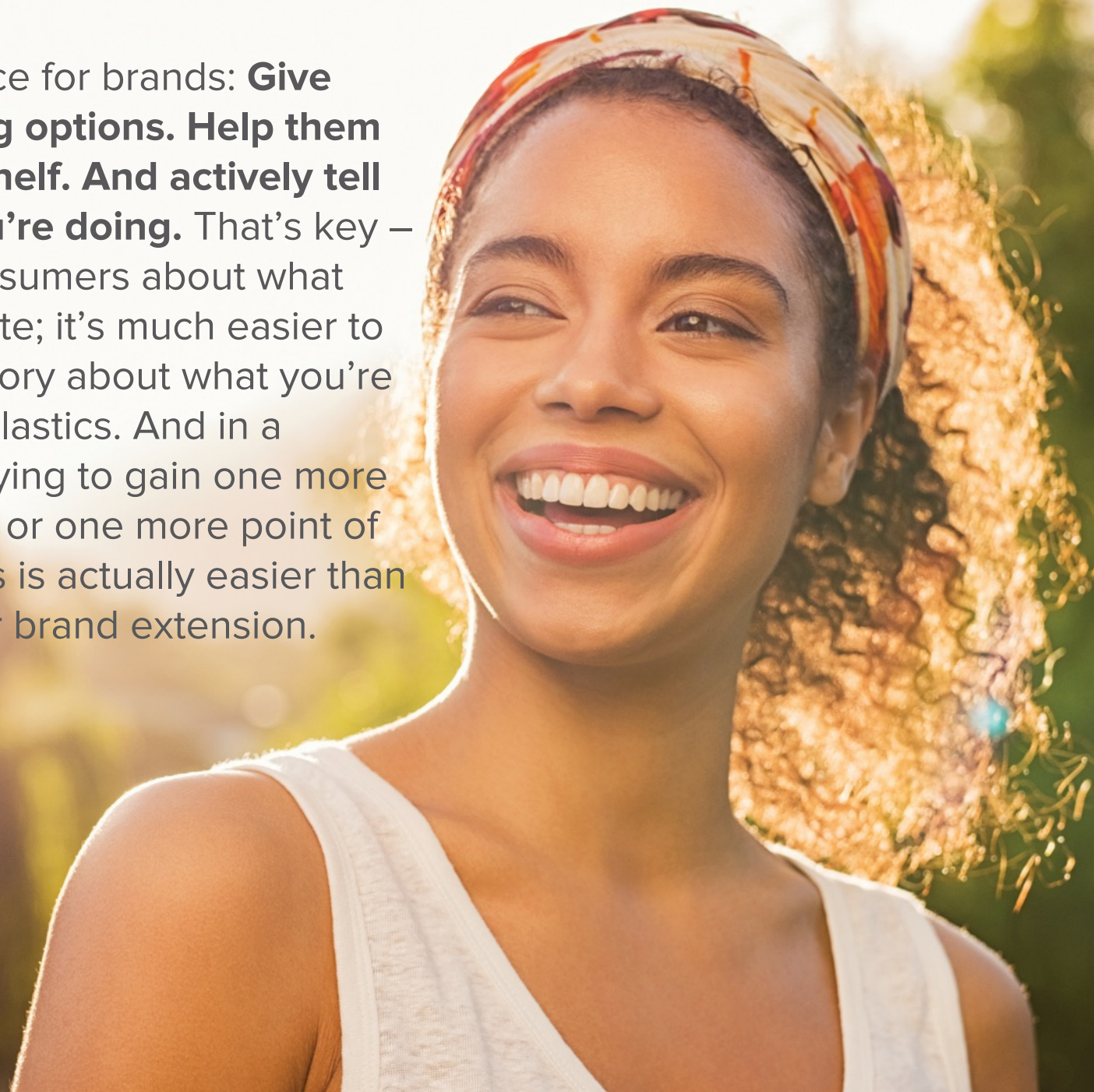
Consumers



Companies

But how will this shift as consumers try to not buy single-use plastics and realize they can't? Who will they blame?

Shelton Group's advice for brands: **Give Americans packaging options. Help them feel empowered at shelf. And actively tell the story of what you're doing.** That's key – it's hard to talk to consumers about what you're doing on climate; it's much easier to tell a heartwarming story about what you're doing on single-use plastics. And in a marketplace of just trying to gain one more point of market share or one more point of brand favorability, this is actually easier than launching yet another brand extension.



Shelton Group is the nation's leading marketing communications firm focused exclusively on sustainability. If you're trying to build a brand around corporate responsibility and sustainability – or sell products that minimize environmental impact – we understand your marketing challenges like no one else. Give us a call. We exist to help organizations like yours gain a market advantage.

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