What Canadian Millennials Think About the Environment and Packaging

Canadian Corrugated & Containerboard Association
Association canadienne du cartonage ondulé et du carton-caisse

DART
Insight and Communications

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Introduction

Millennials (born 1981 – 1996 and now aged 23 – 38 years old) currently make up 28% of the Canadian population (approximately 10 million Canadian adults) and 37% of the electorate. This cohort will become increasingly important over the next decade as both citizens and consumers at every level. Presently, millennials have demonstrated that they are an emergent political force on a number of key issues, not the least of which is the environment.

For this reason, the Canadian Corrugated and Containerboard Association (CCCA) undertook a national public opinion survey of millennials with respect to their views on the environment and packaging. The scope of the study ranges from the categorization of environment issues of importance at both the global and national level to purchasing intentions and packaging concerns.

At the heart of this study is a communications messaging component – the ranking of fact-based messages which are most likely to influence millennials to have a more positive perception of the industry both in terms of its products at its business. These messages can be incorporated into all manner of communications undertakings and collateral materials both for the CCCA and its individual members. The study also provides a segmentation analysis of millennials based on their self perceived environmental efficacy.

What follows are the results of the survey which were presented to the CCCA management and board of directors on April 23, 2019. A high-level perspective was also provided at the CCCA annual conference on April 24, 2019. Quebec results are similar to the rest of Canada but highlighted to identify distinctiveness or comparison.

Methodology

A total of 2,200 Canadian Millennial adults were interviewed from March 3 – 11, 2019 via an Online panel curated and maintained by the national supplier Maru Blue. The data was then weighted and balanced to the general population census and was made representative to the millennial population across the country. The accuracy of the results are expressed using a Bayesian Credibility Interval: for a total sample of 2,200 the credibility interval is +/- 2.9% 19 times out of 20. Regional and sub-sociodemographic findings carry a higher credibility interval.

Guidance

Millennials are often stereotyped as a homogenized group of citizen consumers. They are often maligned in the news media and in other casual observations as being a "snowflake" generation, lazy, and expectant of promotion and success without "paying its dues". Of course, this is untrue. Any study of any cohort finds internal differentiation, often time dividing the group into various different segments based on their own beliefs, experiences, and desires.

The study demonstrates that this is also the case when it comes to the issue of the environment – millennials are not unanimous in their views or their belief in what will remedy their concerns. They also hold differing views of the packaging industry and its products, its culprits, and its heroes, who they are most likely to believe and what is said about the environment.

The questionnaire was developed in a very careful manner so that "inter-item contamination" was minimized. Respondents are walked through a series of questions and scenarios that built gradually towards more educated and focused sections of questioning. This way, there was a cascading knowledge that flowed through the questionnaire without unduly influencing answers that followed. For the purposes of this report, the findings do not follow the specific order of the questionnaire sequence; this is deliberate so that the story behind the data can be presented in a coherent, contextual fashion.

The critical deliverable for the study was driven by the desire to find messages that could be communicated via the CCCA and its membership that would help elevate its stature among millennials on the issue of the environment. The following is a top-level guidance based on the findings of this research that follows afterwards:

- Like all other demographic cohorts, it's important to view millennials as very concerned with environmental issues both globally, nationally, and locally—with varying degrees of involvement, consternation for players and products, and receptivity to messaging.

- Millennials, like others, hold the originators of products and packaging, and government regulators, primarily responsible for mitigating any impact of those commodities on the environment.

- For the most part, the sector appears to be viewed as being much more in tune with positive environmental attributes than others in the packaging industry. While corrugated cardboard is viewed as the least of all packaging material offenders, there are concerns about overpackaging in e-commerce purchasing versus retail outlet packaging.

- The sector itself is viewed relatively positively for its contributions to Canadian society and its efficacy and its impact on the environment.

- This is not an industry in messaging, positioning or communications crisis; however, it is in the mix (especially at the local level with landfill and milling/forestry) and there are factual messaging aspects of both the "business" of the sector and the product itself that can help lift the perceptions of millennials more positively. The research has carefully ranked those things that matter most and provide a series of issue buckets that can be addressed in priority sequence.

- There are mitigating public affairs overarching messages that can work well for the sector in generating more positive perceptions…these tiered messages can also be integrated into business operators across the country, with some differing variation of emphasis in Quebec,

- The study ranks both positive and negative perceptions of the product and the business—and some of these should be further explored via public relations reciprocal messages that can be tested and ranked to ensure accuracy and impact on intended audiences.

- There is clearly an appetite for new and evolving packaging products that have potential retail attraction and possible incorporation into positive messaging examples: this should be explored further and tested among millennial consumers to ensure introduction and expansion of the concept is viewed as truly prudent and part of the solution-oriented landscape.

- From a communications messaging perspective, it may be particularly worthwhile for the Association to consider leveraging any relationships it has with the Forest Industry Association and academic institutions where joint communications efforts might be pursued for mutual benefit, especially via the ranked national messages noted below.

The Environment as an Issue: Millennial Priorities

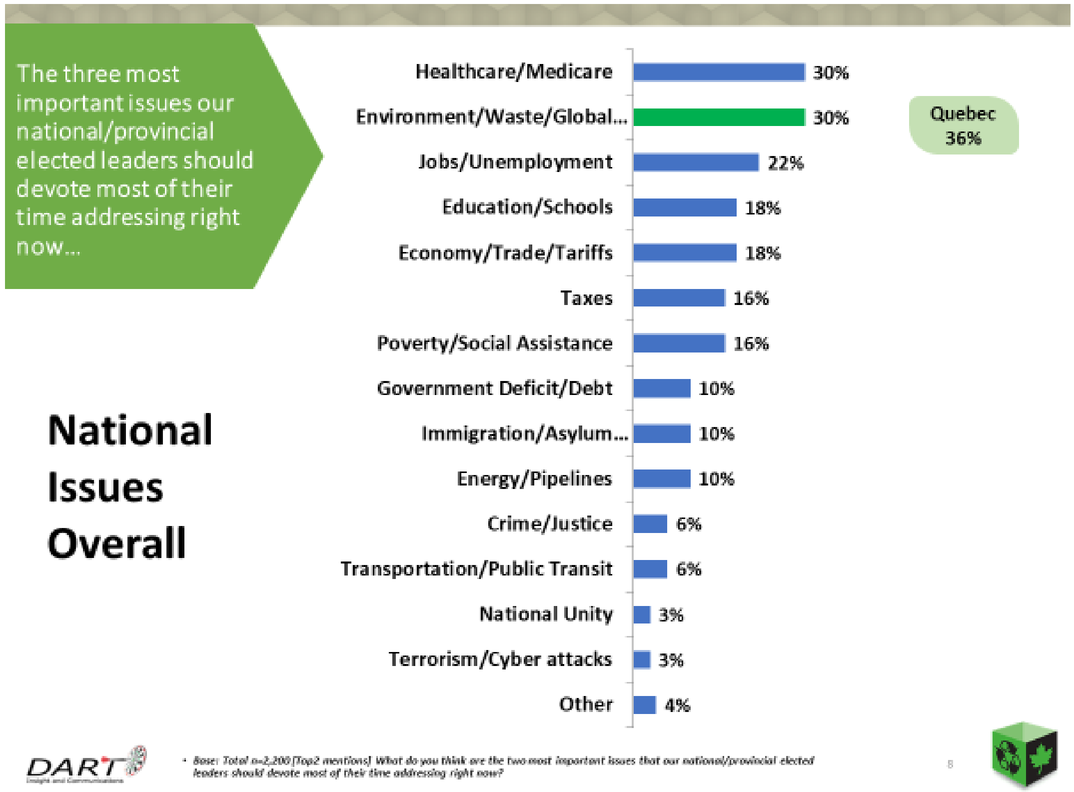
The three most important issues our national/provincial elected leaders should devote most of their time addressing right now…

Identifying what the top public policy issues are for millennials – essentially the priorities they place on issues of importance to themselves and for their national leaders – is important because it ranks and contextualizes all of the issues into points of priority and emphasis and where the "packaging" issue resides within that list of priorities. The survey results indicate that the environment is the second most important issue that millennials believe their elected leaders should devote most of their time addressing right now (30%), tied with concerns about healthcare.

Concern about the environment/waste/global warming (30%) is highest in the province of British Columbia (39%) and followed by those in Québec (36%), Atlantic Canada (30%), Saskatchewan/Manitoba (29%), Ontario (27%) and Alberta (18%).

There is virtually no difference between millennial men (28%) and women (32%) on the ranking of the environment as an important issue – if there are any differences in the entire list, women (39%) are more likely to put healthcare/Medicare ahead of men (21%) and education/schools (23%) versus men (13%) whereas men are more likely to believe that the economy/trades/tariffs (22%) are more important than their gender counterpart (14%).

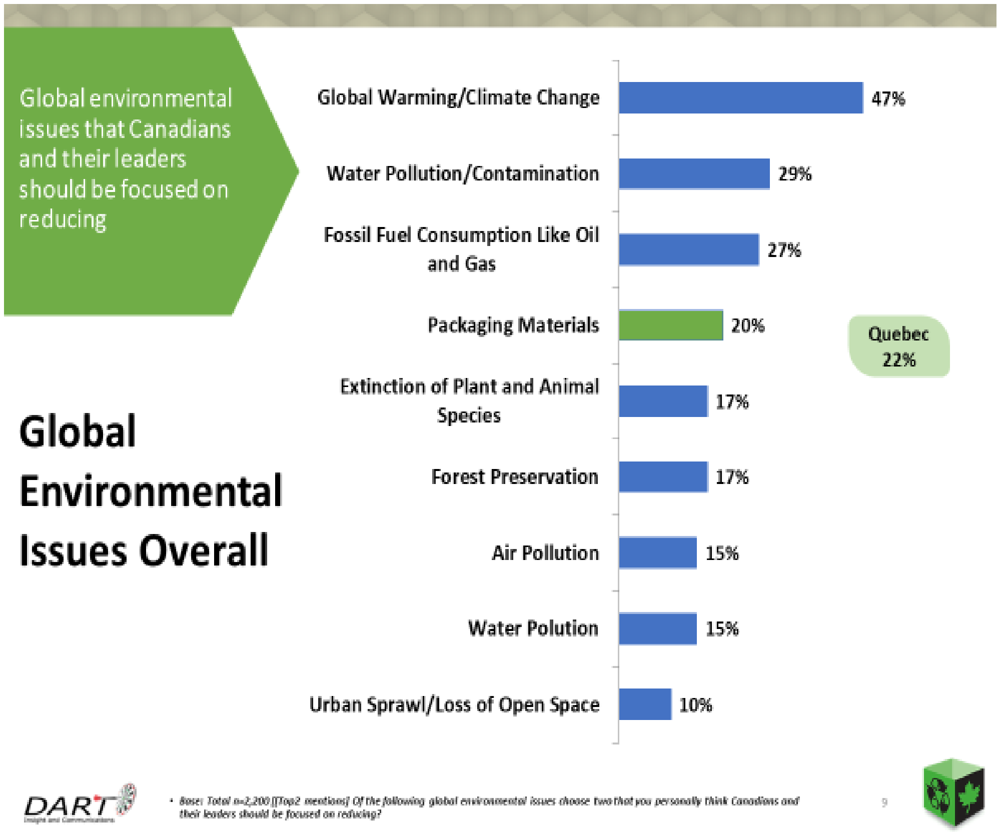
Those who have the environment as a higher ranked issue are also among those who are more educated and have more income. The lower educated and lower income millennial groups give more emphasis to issues related to jobs/unemployment.



Global environmental issues that Canadians and their leaders should be focused on reducing…

Switching to a more global perspective, millennials indicate that global warming/climate change (47%) is by far the most important issue ahead of all others – with the issue of water pollution/contamination (29%) and fossil fuel consumption like oil and gas (27%) well behind.

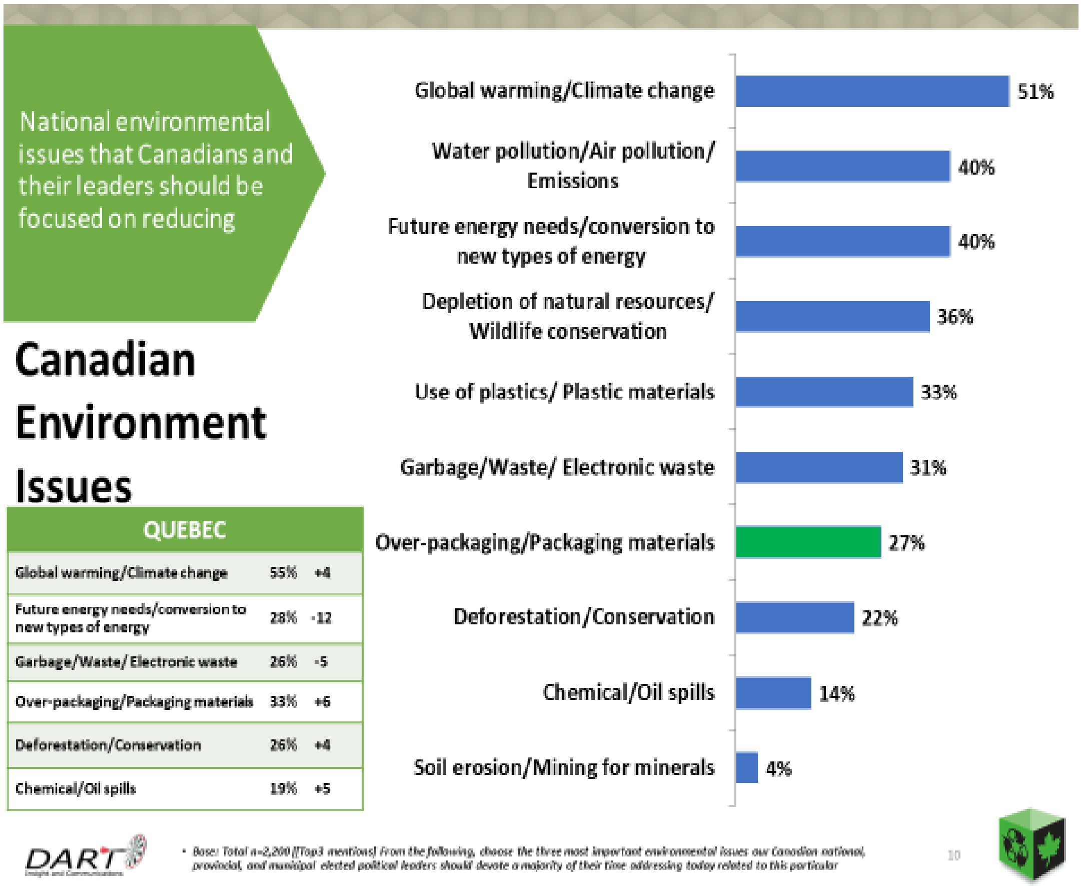
Of those who indicate that global warming/climate change (47%) is the most important global environmental issue, they are most likely to be found in Atlantic Canada (52%) followed by those in British Columbia (51%), Ontario (49%), Québec (47%), Alberta (42%) and Saskatchewan/Manitoba (41%).



Packaging materials (20%) is the fourth most important global environmental issue and is uniform across all of the provinces.

National environmental issues that Canadians and their leaders should be focused on reducing…

When asked to identify the environmental issues that Canada's leaders should be focussed on reducing, global warming/climate change (51%) ranks first followed by others with "over – packaging/packaging materials" ranked seventh at 27%.

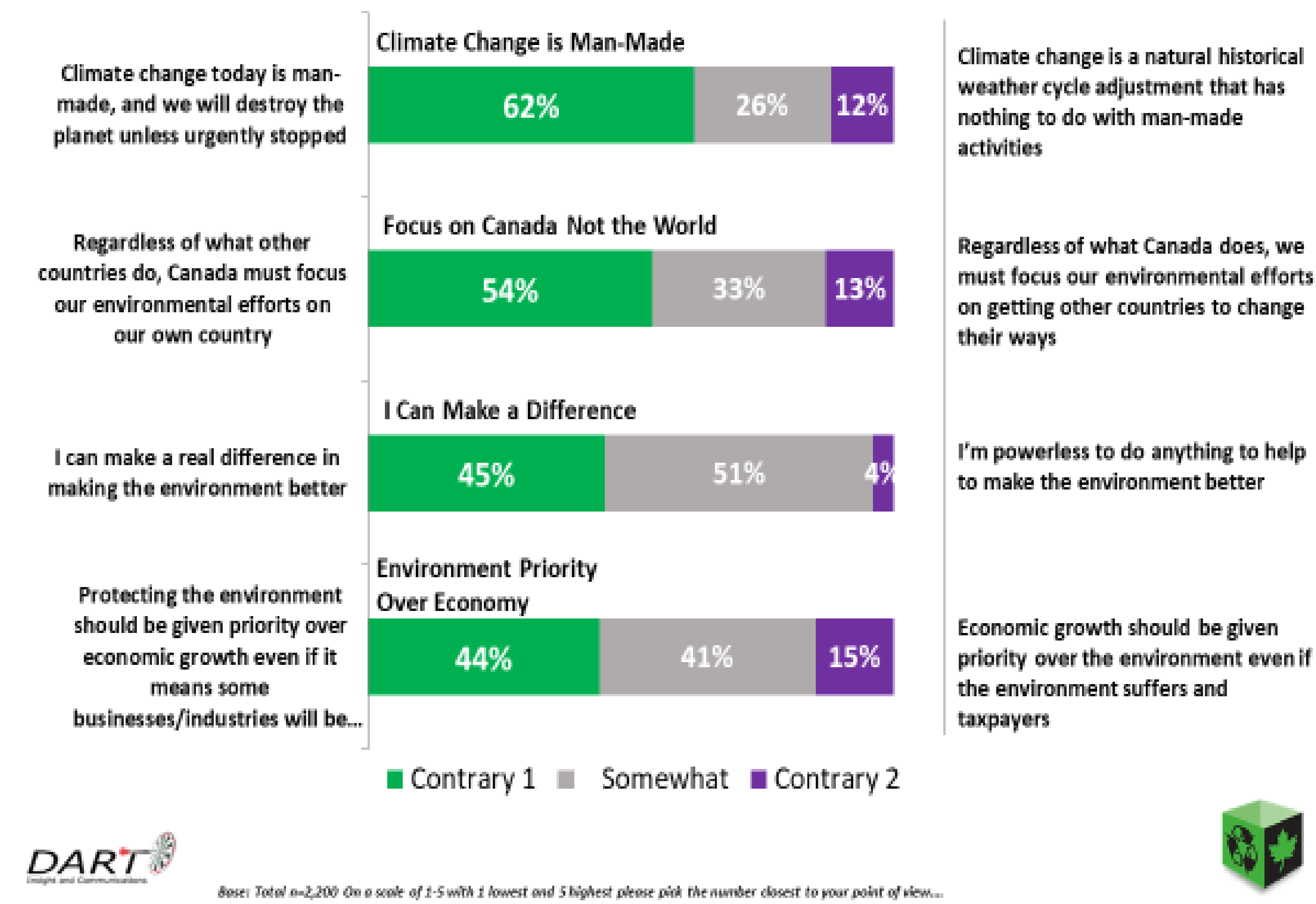


In terms of millennial geography, those who believe that over – packaging/packaging materials should be reduced as a priority are most likely to reside in the provinces of Alberta (33%) and Québec (33%) followed by those in Saskatchewan/Manitoba (27%), Ontario (24%), British Columbia (22%) and Atlantic Canada (20%).

Millennial Environment Personal Perspectives…

Millennial respondents were then provided with a series of statements about the environment in order to assess various aspects of their personal beliefs.

As the chart below reveals, each statement revealed the intensity of embrace: climate change today is man-made and "we will destroy the planet unless urgently stopped" (62%) and that regardless of what other countries do, "Canada must focus our environmental efforts on our own country" (54%). This is best reflected in the current political thrust of the Federal government which has leveraged these two millennial perspectives and reflected them squarely at the cohort which supported the Trudeau Liberals in the last election campaign.



In crass political terms, the only areas in the country where millennials are less supportive of these ideals are in the provinces of Alberta/Saskatchewan/Manitoba – provinces where Conservative support is strongest and where the Liberals are not likely to make many inroads. In the alternate, the embrace of these ideals is most found in the provinces/regions where the Liberals aim to hold their political advantage.

A significant number of millennials also believe that they can make “a real difference in making the environment better” (45%) and that protecting the environment “should be given priority over economic growth even if it means some businesses/industries will be adversely affected and jobs lost” (44%).

Taken together, these statements are the cradle of the environment policies currently embraced by the government—these are meant to motivate this critical voter group—especially millennial women—to get to the polls in the next General Election that will be held in October 2019.

In terms of the belief that *they can make a difference in making the environment better* (45%), those most likely to believe so are from the province of Québec (48%) followed by those in British Columbia (45%), Ontario (44%), Alberta/Atlantic Canada (42%) and Saskatchewan/Manitoba (41%). Women (48%) are more likely to embrace this view than men (41%).

Among those who believe that protecting the environment should be given priority over economic growth even if it means some businesses/industries will be adversely affected and jobs lost (44%), they are primarily women (48%) versus men (40%), and are from British Columbia (52%), Ontario (40%), Atlantic Canada (47%), Québec (43%), Saskatchewan/Manitoba (37%) and Alberta (30%).

Millennial Environment Segmentation

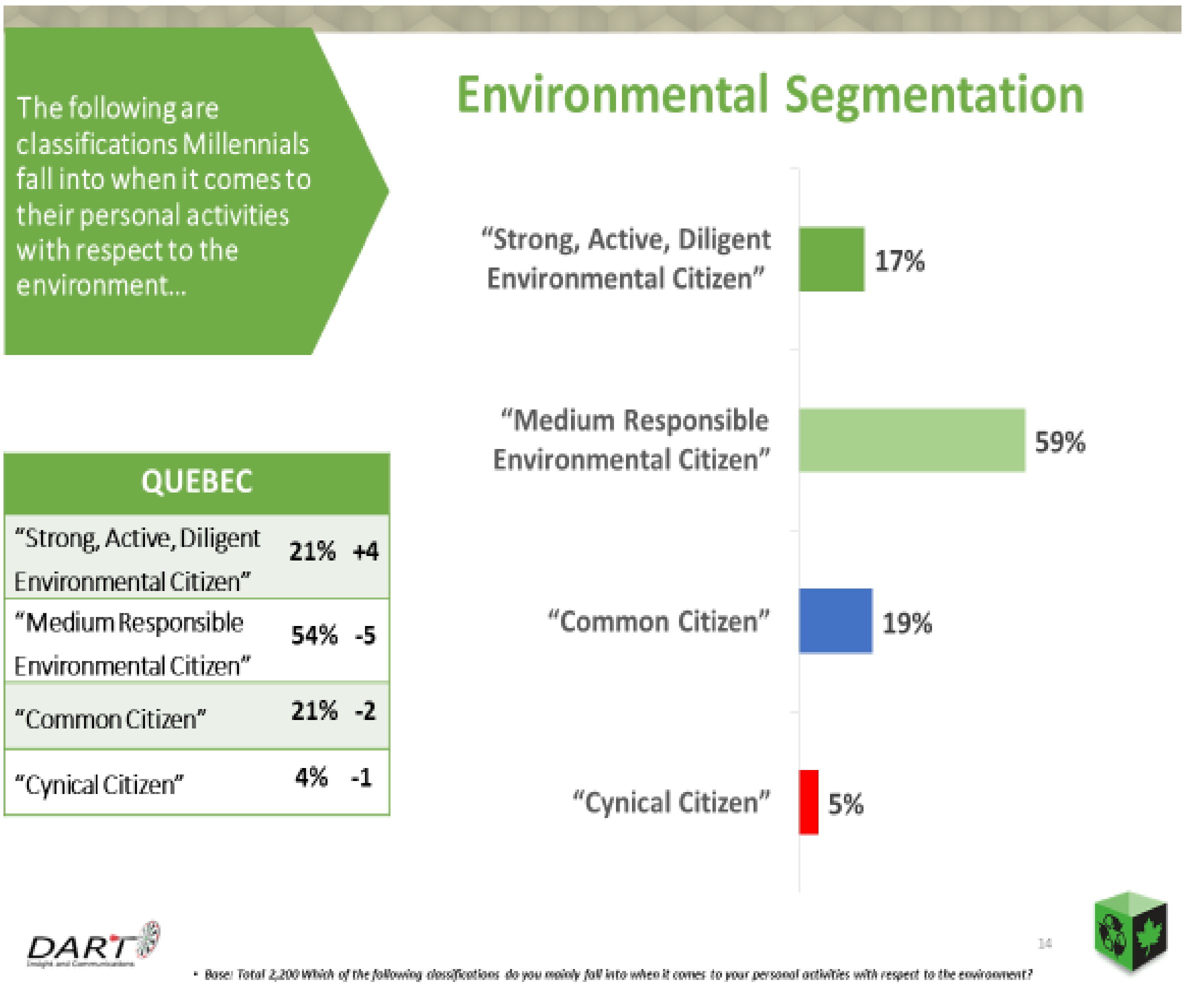
The study produced a segmentation of millennials based on self identification of efficacy/involvement as opposed to a values/psychographic segmentation analysis. The results below actually mirror similar outcomes from survey research conducted between 1990 and 1995 on the same topic. The segments are described as follows:

Strong, Active, Diligent, Environmental Citizen (17%): characterised as *Most decisions I make are connected to ensuring the health of our current and future environment impact*. There is virtually no demographic differentiation for this segment; however, geographically, a greater proportion is found in Québec (21%) followed by those in Atlantic Canada/British Columbia and Ontario (18%) with the least number found in Alberta (12%) and Saskatchewan/Manitoba (11%).

Medium Responsible Environmental Citizen (59%): characterised as *I participate in environmental efficacy/activities, but I'm not obsessed.* This group is more likely to be female (64%) than male (54%), have higher income ($100,000 + 65%) and postsecondary education (62%). This group is most likely to be found in Alberta (62%) followed by those in British Columbia (61%), Ontario (60%), Saskatchewan/Manitoba (59%), Atlantic Canada (58%) and Québec (54%).

A Common Citizen (19%): characterised as *The Environment and related efficacy/activities take a real backseat to my life because of other more important things/cynicism*. This group is more likely to be comprised of more men (22%) than women (17%), are lower income and educated and more likely to hail from Saskatchewan/Manitoba (24%) followed by those in Québec (21%), Alberta/Atlantic Canada (20%) and British Columbia/Ontario (18%).

Cynical Citizen (4%): characterised as *I don't really believe the hype and will start doing my bit when countries like China and India do theirs*. Little differentiation at all, and geographically most likely to come from Alberta (6%) followed by Saskatchewan/Manitoba/Ontario (5%).



Noting that this assignment is primarily to determine messaging for a key millennial audience, the segmentation identified six in 10 (59%) as the middle-ground/pragmatic group within the cohort that offers the greatest potential for message receptivity.

Recycling Participation and Packaging

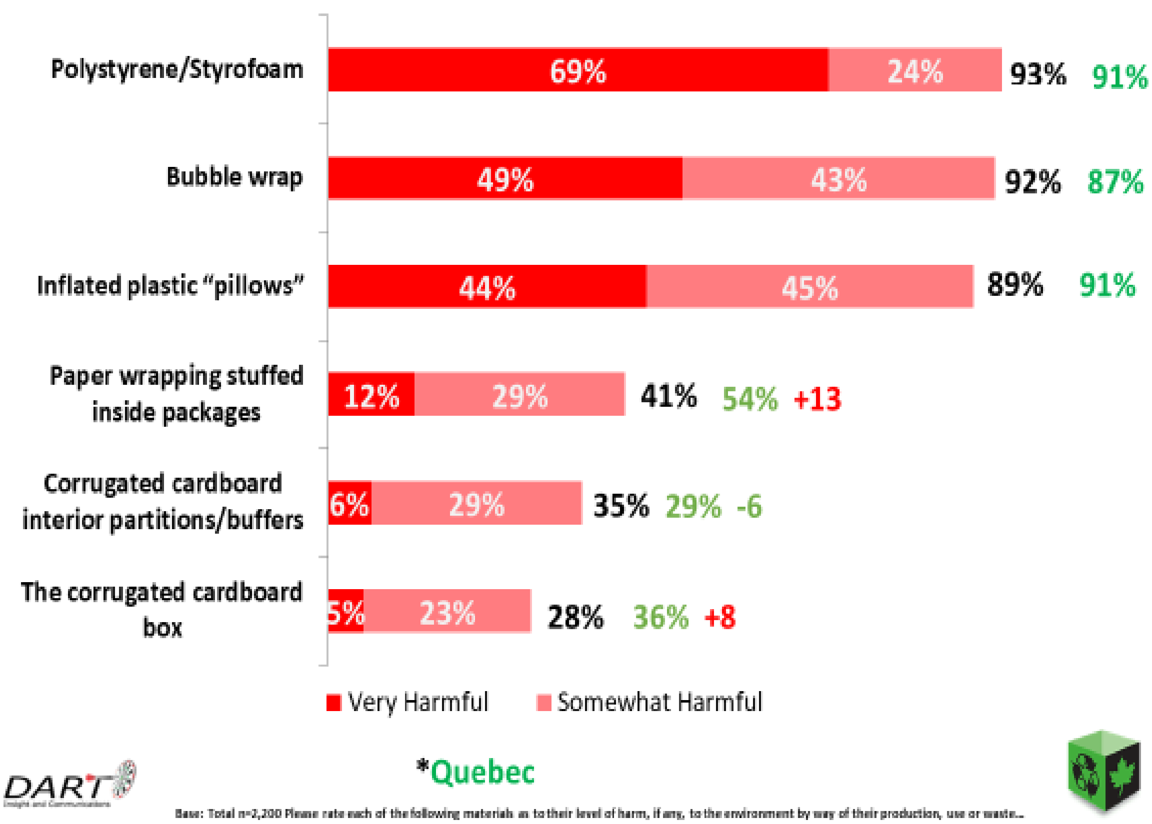
Recycling Participation…

Millennials are more likely to be involved in an organized recycling program at their apartment/condominium (42%) than to be participating in a municipally run curbside recycling program (31%).

Another one in five (21%) take recycling materials to a drop-off spot or clearing station (rural dominant) and the remainder are essentially not committed to or involved in a program whatsoever (total 10%).

Materials that Harm the Environment by Way of Their Production, Use or Waste…

Determining what are considered by millennials to be "harmful products" to the environment speaks to the packaging industry directly. It's important to note that of all of those materials tested, those deemed to be "very harmful" are profiled the most herein.



As an example, polystyrene/Styrofoam is seen as "very harmful" by 69% of respondents compared with just 6% who view corrugated cardboard interior partitions/buffers, and 5% with respect to the corrugated cardboard box, the same.

It is this intensity of opinion that matters more than the overall number itself—in a public affairs perspective, intensity is the voice that matters most. As such, corrugated cardboard/interior partitions/buffers and the corrugated cardboard box itself are less of a concern then any other component for packaging – their production, use or waste.

In aggregate, **corrugated cardboard interior partitions/buffers** are viewed as harmful to the environment by approximately one third of the millennial population (35%) [6% **very**/29% somewhat] with this view held more in Ontario/Atlantic Canada (38%) than in Québec (36%), Saskatchewan/Manitoba (35%), British Columbia (34%) and Alberta (30%).

Assessed the same way, **the corrugated cardboard box** is viewed as harmful to the environment by approximately three in 10 (28%) [**5% very**/23% somewhat]. This view is most likely to be held in Ontario (31%) and Québec (29%), followed by those in British Columbia (27%), Saskatchewan/Manitoba (25%), Alberta (22%) and Atlantic Canada (21%).

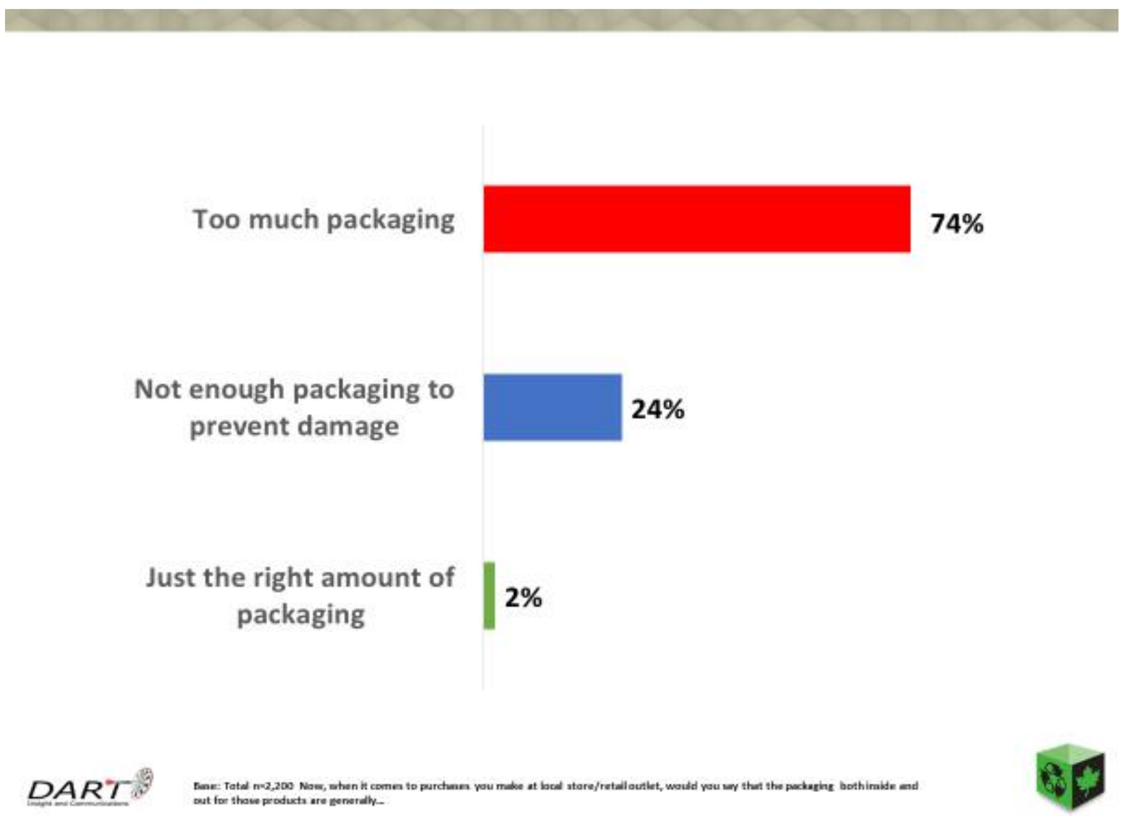
Packaging

Millennials were presented with scenarios involving packages purchased at either a retail outlet or by e-commerce. The purpose of this was to determine the differences in perception about packaging both between and within the two different purchasing platforms.

Retail Outlet Packaging

When it Comes to Purchases Made at a Local Store/Retail Outlet, the Packaging Both Inside and Out for Those Products are Generally…

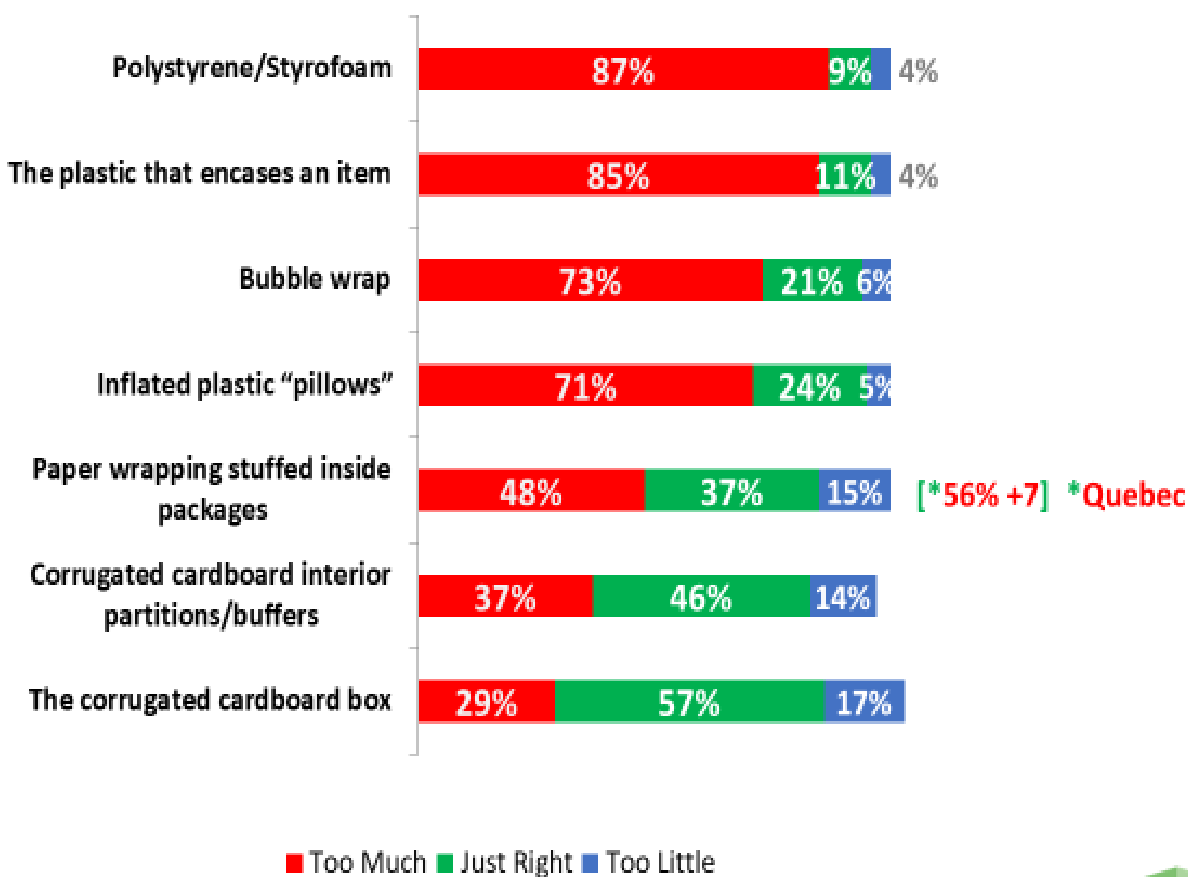
A majority (**74 %**) of millennials believe that packages purchased at a local store/retail outlet have ***too much packaging*** compared to one quarter (24%) who believe that there is ***not enough packaging*** to prevent damage – and, notably only 2% believe there is ***just the right amount of packaging***.



There is virtually no difference in perception in terms of demography or socioeconomic background; but, from a geographic perspective, those most likely to believe that there is "just the right amount of packaging" are from Saskatchewan/Manitoba (27%).

Of the 74% Who Say it's Overpackaged: The Following are Used Too Much, Just Right, Too Little…

In terms of packaging materials contributing to overpackaging, Polystyrene/Styrofoam (87%) is at the top of the list followed closely thereafter by the plastic that encases an item (85%). The second tier of concern relates to bubble-wrap (73%) and inflated plastic "pillows" (71%).



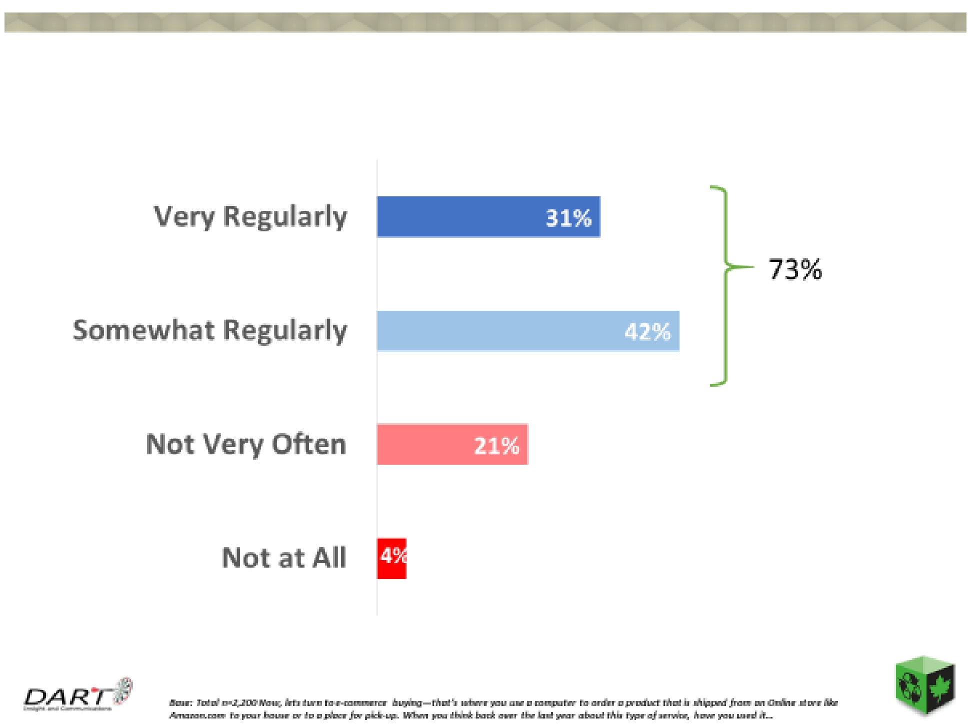
Base: Total n=1,628 So let's identify the components used for a variety of packaging you would find in a retail outlet. Generally speaking, do you think the following are used too much, too little, or just right for packaging items?

In the third tier of concern there is paper wrapping stuffed inside packages (48%) followed by corrugated cardboard interior partitions/buffers (37%) and the corrugated cardboard box itself (29%). For the cardboard categories, there is virtually no geographical difference in terms of perceived impact.

e-Commerce Packaging

Utilization of e-Commerce Buying—order a Product that is Shipped from an Online Store Like amazon.com to Your House or to a Place for Pick-up…

The study indicates that three quarters (73%) of millennials are involved in e-commerce – with three in 10 (31%) very regularly involved with the practice.



For those who are very regular proponents of e-commerce purchases and delivery, there is little differentiation when it comes to sociodemographic identification. However, household owners (36%) are more likely to use this service (owners compared to renters at 28%) than those with children (37% compared to those without at 28%.) Geographically, those most likely to use e-commerce buying/delivery (31%) are from Ontario (34%), followed by those from British Columbia/Alberta (32%), Québec (28%), Atlantic Canada (26%) and Saskatchewan/Manitoba (24%).

Of the 73% e-purchase Group (very/somewhat), 6 in 10 (58%) Believe the Packaging Both Inside and Out is Too Much…But Less So than the Retail Package Scenario…

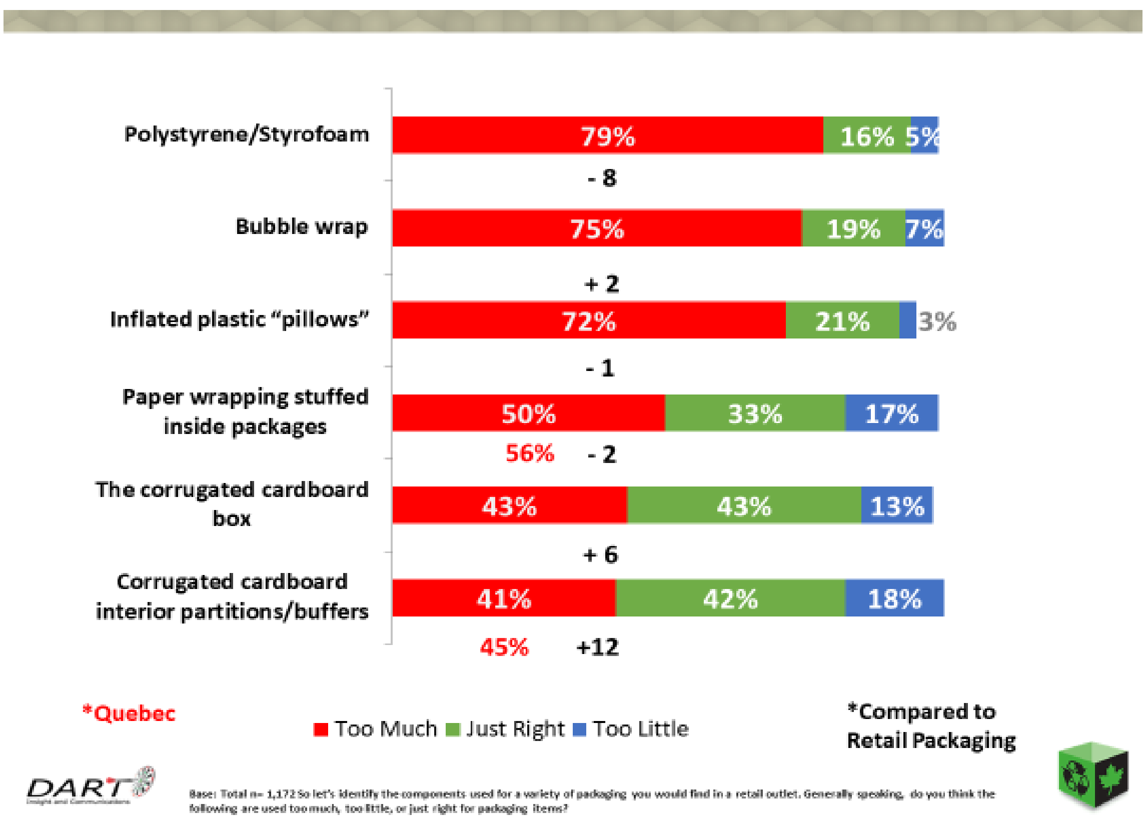
When comparing the level of packaging between the retail outlet and e-commerce purchasing option, the perception of "too much packaging" is much greater in the retail outlet (74%) compared to the online purchase/delivery scenario (58%)—a gap of + 16.

And while almost no-one agrees that there is "not enough" packaging in either scenario, the group who believe that there is "just the right amount of packaging" is considerably higher in the e-purchase/delivery scenario—39% up from 24% (+15.)

Simply put, the perception of e-commerce packaging is that it is more environmentally considerate than packaging that is done at the retail outlet – ***however, that is not the case when it comes to corrugated cardboard which is identified as a culprit in e-commerce overpackaging.***

Of the 73% Who Say it's Overpackaged, the Following Shipping Materials are Used Too Much, Just Right, Too Little:

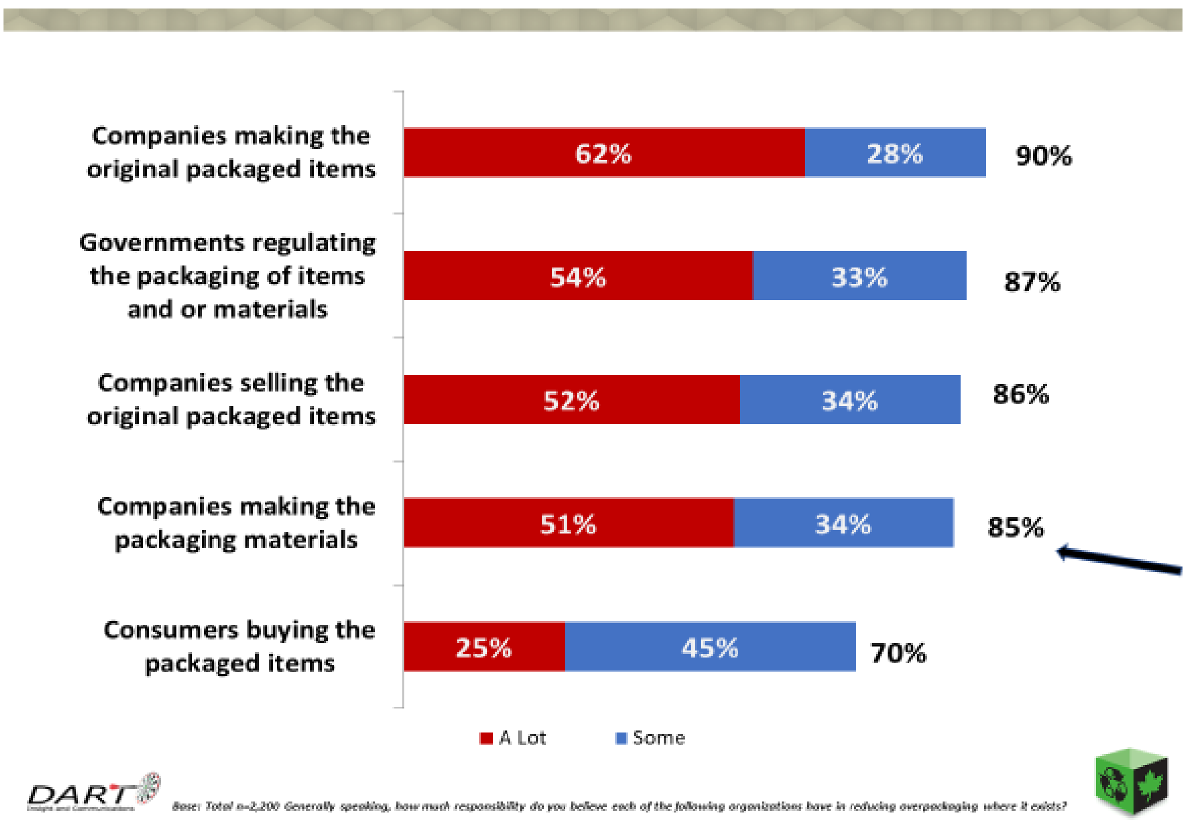
Of all of the packaging materials noted, use of corrugated cardboard appears to be the only material that is deemed *more significant* compared to the retail outlet packaging materials.



The findings reveal that both the corrugated cardboard box (+6) *and* the interior partitions/buffers (+12) are viewed as *more overpackaged than the retail outlet scenario*. As noted in the chart, those in Quebec are more likely than other provinces/regions in the country to believe that "paper wrapping" and the "corrugated cardboard interior partitions/buffers) are culprits for overpackaging.

How Much Responsibility Does Each of the Following Organizations Have in Reducing Overpackaging Where it Exists?

It's clear that millennials don't believe that they themselves have much of a responsibility (25%) in reducing overpackaging where it exists. The red bar in the chart measures the *intensity* of their views with two thirds (62%) placing top emphasis on companies making the original packaged items as having the most responsibility and then cascading downwards to companies that make the packaging materials (51%.)

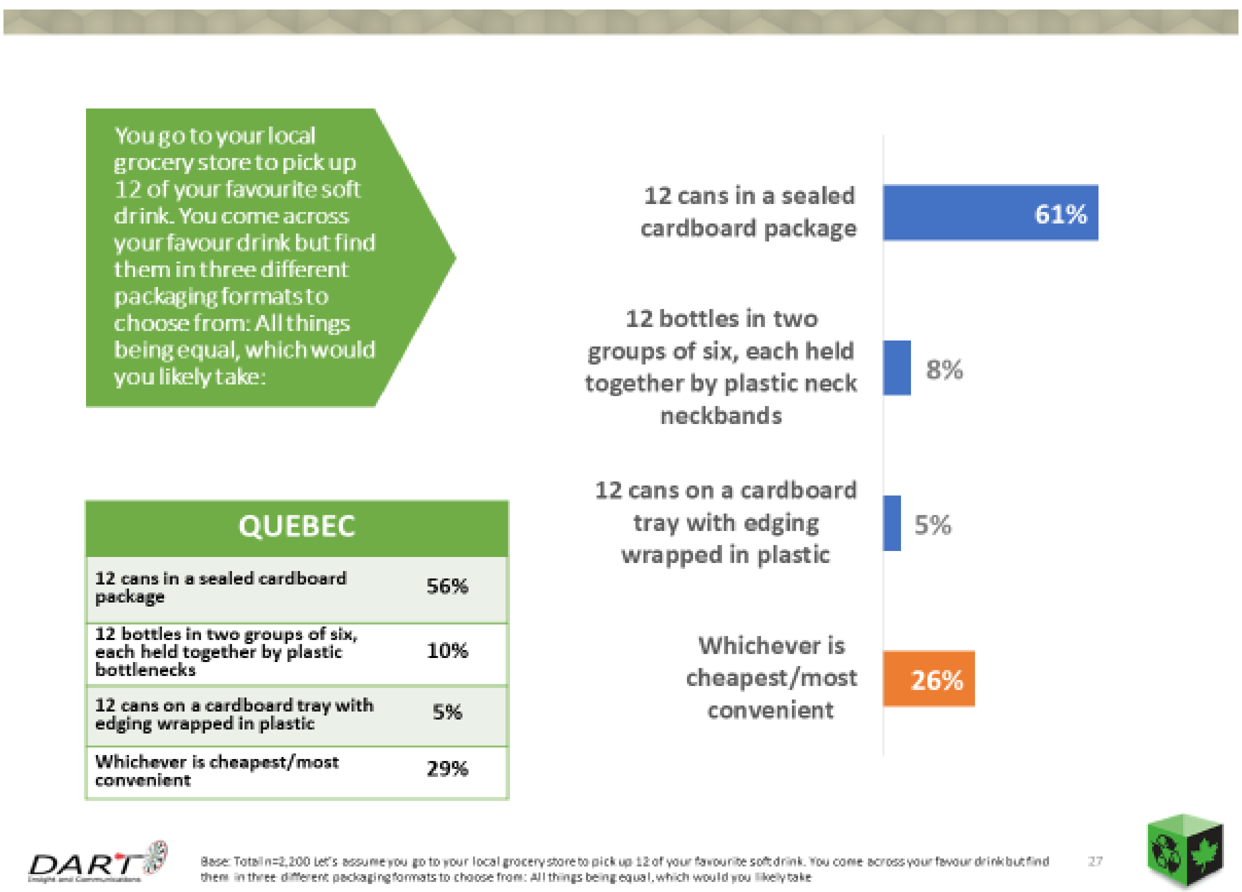


Millennials believe that government and businesses hold the hammer, not themselves, when it comes to making any significant change in the amount of packaging that is employed. Clearly, innovation from within the industry compared to regulation atop the sector is preferred—but not by much.

Grocery Store Packaging Choices…

Grocery Store Picks…

The following two questions were placed back to back (and higher up in the questionnaire before packaging materials were assessed.) The first results reveal that almost 2/3 (61%) of millennials, if given a choice, would most likely choose 12 cans of their favourite soft drink packaged within a sealed cardboard package (56% in Québec) versus other options.



This choice is highest in British Columbia (68%) followed by those in Atlantic Canada (67%), Saskatchewan/Manitoba (65%), Ontario (62%), Alberta (61%) and Québec (56%.)

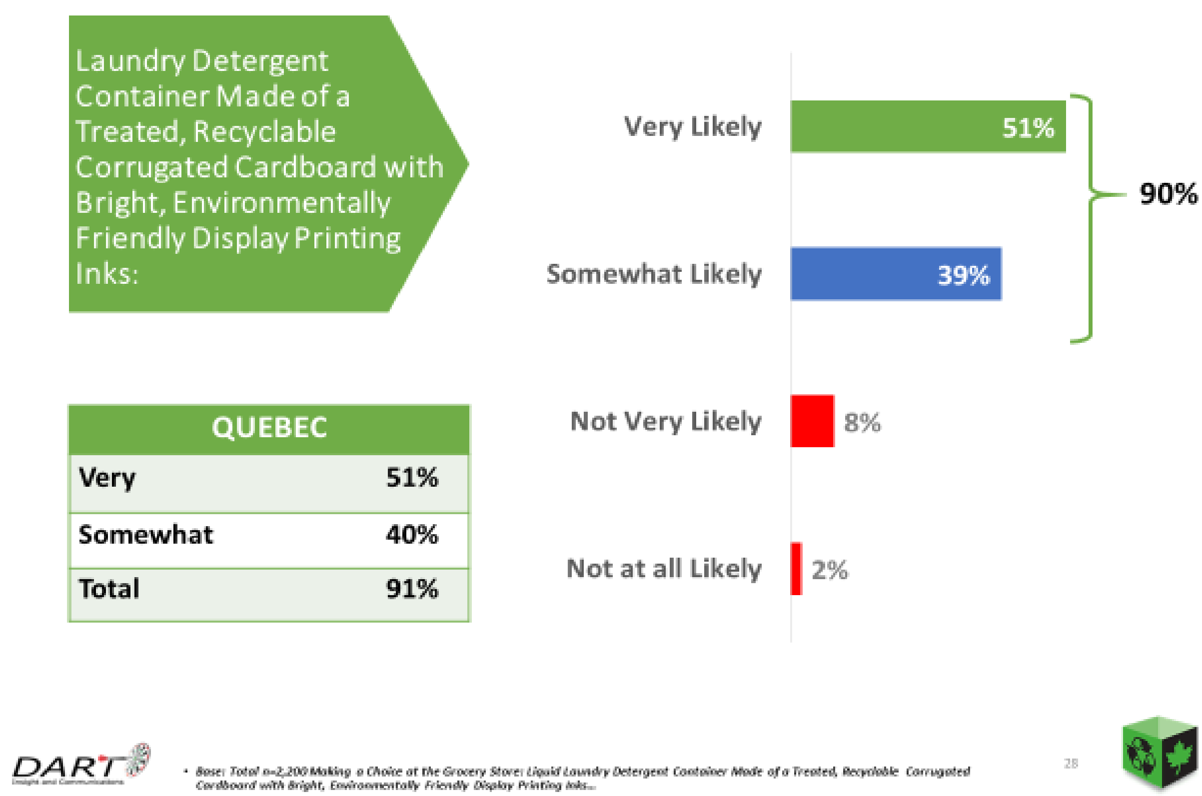
Those most likely to be driven by simply cheapest cost/convenience (26%) are most likely to be found in Québec (29%) followed by those in Alberta (28%), Saskatchewan/Manitoba (27%), Ontario (25%), Atlantic Canada (23%) and British Columbia (20%.) There are no significant sociodemographic differences with either or any of the choices noted above.

Testing the Propensity for Choice at the Grocery Store with an Innovative Product…

Research outside of this study has demonstrated that product innovation is the hunting ground for millennials. As such, the survey tested the propensity of purchasing a potentially new liquid laundry detergent container made of a treated, recyclable corrugated cardboard with bright, environmentally friendly display printing inks.

And while nine in 10 (90%) a millennials indicated that they might be persuaded to purchase such a package, ***half (51%) expressed*** a ***much more emphatic desire to do so***. Those most likely to want to try this type of container are female (55%) compared to males (47%), those with post secondary education (57%), higher income (57%) and those with children (55%.)

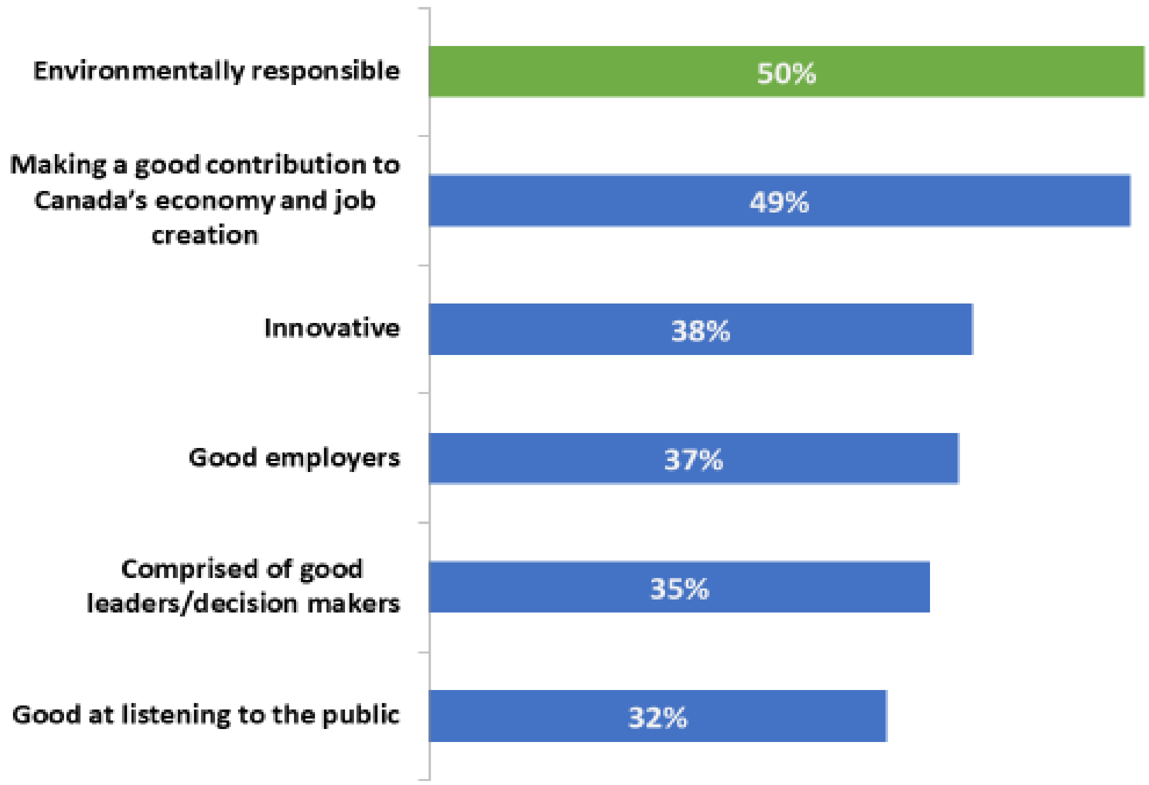
With respect to geography, those most likely to want to try this innovation hailed from Ontario (54%) and Atlantic Canada (54%), followed by those from British Columbia (52%), Québec (51%), Alberta (47%) and Saskatchewan/Manitoba (42%.)



Impressions of the Corrugated Cardboard Industry

Overall, What Kind of an Opinion Do Millenials Have of the Canadian Corrugated Cardboard Industry?

There are two measurements that are made when assessing the opinion that millennials have on various dimensions of the Canadian Corrugated and Containerboard industry: the first is with *all responses including those who indicate they don't have an impression or opinion* followed by backing those "don't knows" out and rebasing the results to determine how *those with an opinion view* the industry and its various dements.



Base: Total n=2,200 including DK Overall, what kind of an opinion do you have of the Canadian corrugated cardboard industry? Is it made up of companies that, on the whole, are...?

As this is a study about the environment and packaging, it's gratifying to find that the highest attribute measured speaks to an industry/sector that is "environmentally responsible" – identified by half (50%) of all millennials *including those who don't have an opinion*. Among all millennials, those who are most likely to have a positive opinion of the sector when it comes to the environment are from Québec (54%) followed by those from Ontario (51%), Atlantic Canada (50%), Alberta (48%), and British Columbia/Saskatchewan/Manitoba (47%.)

Millennials who view those in the sector as making a good contribution to Canada's economy and job creation constitute half (49%) of all respondents, followed by those who believe that the same is true for being innovative (38%), good employers (37%) comprised of good leaders/decision-makers (35%) and good at listening to the public (32%.)

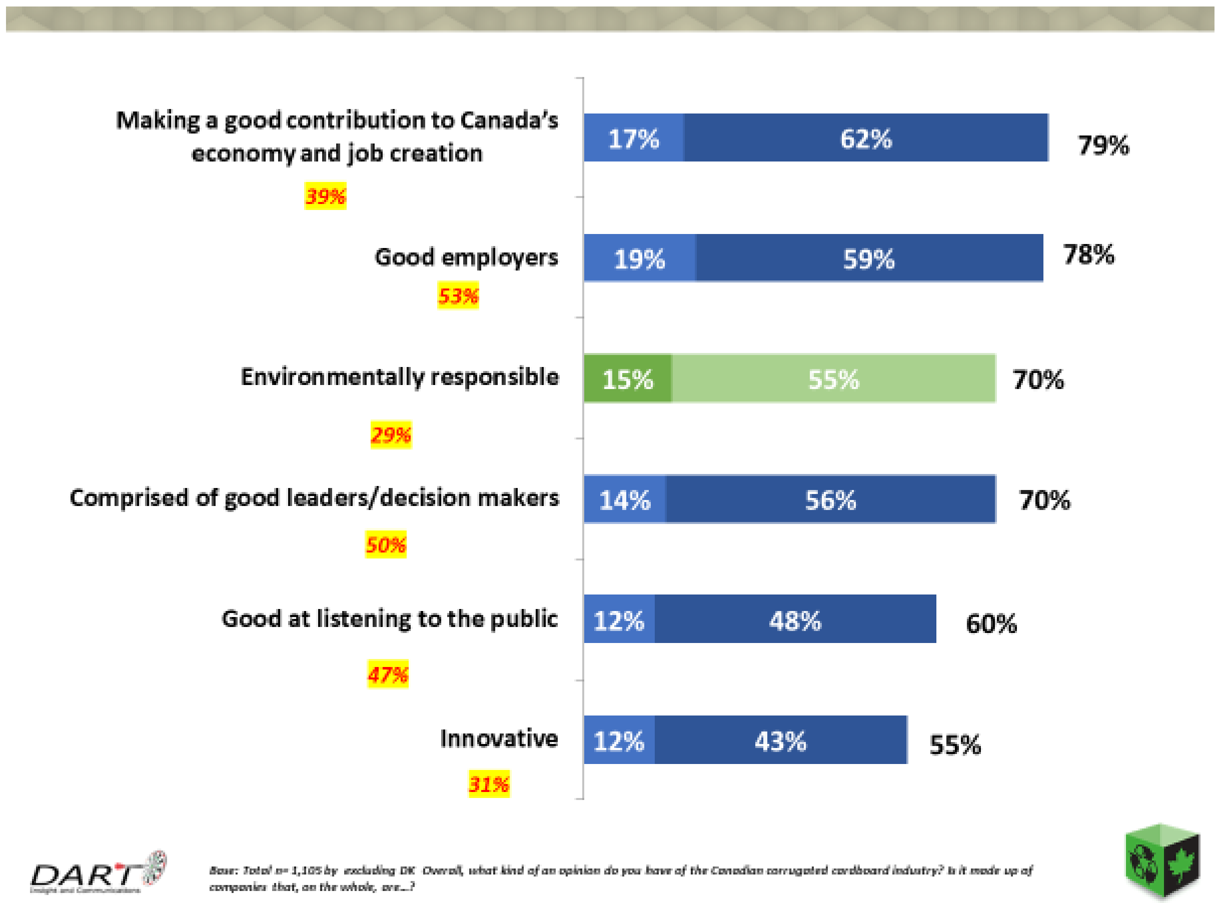
But, as noted above, there are many millennials who don't have a view of the industry at all on certain attributes: a slim majority (53%) have no view as to whether the industry is "comprised of good employers"; half (50%) don't have a view as to whether the sector is "comprised of good leaders/decision-makers"; almost half (47%) don't have a view as to whether the industry is "good at listening to the public"; four in 10 (39%) don't have a view as to whether the industry makes "a good contribution to Canada's economy and job creation"; three in 10 (31%) don't have a view as to whether the industry is "innovative"; and, three and 10 (29%) don't have a view as to whether the industry is "environmentally responsible".

Opinion of The Canadian Corrugated and Containerboard Industry—Made up of Companies that are…Excluding Don't Know…

Knowing that many millennials do not have an opinion of the industry, the next chart identifies those who ***do have an opinion*** (we have backed out those who don't have an opinion and highlighted their size next to the rebased values.)

- Of the 61% of millennials who have a view, **79%** believe that the industry is making a good contribution to Canada's economy and job creation. This view is held relatively uniform across the country with the exception of Atlantic Canada which has the most support higher at 86%

- Of the 47% of millennials who have a view, **78%** believe that the industry is comprised of companies that are good employers with the highest level of support in Saskatchewan/Manitoba (87%)



- Of the 71% of millennials who have a view, **70%** believe that the industry is environmentally responsible with its highest marks in Alberta (70%) and Saskatchewan/Manitoba (77%)

- Of the 50% of millennials who have view, **70%** believe that the industry is comprised of good leaders/decision-makers – uniformly across the country

- Of the 53% of millennials who have a view, **60%** believe that the industry is good at listening to the public with highest marks coming from Saskatchewan/Manitoba (70%)

- Of the 69% of millennials who have a view, **55%** believe that the industry is innovative – which has slightly more support in Alberta/Saskatchewan/Manitoba (58%)

In the alternate, of those millennials with a view:

- Those most likely to believe that the industry is ***not*** environmentally responsible (29%) are more likely to be from Ontario and Québec (31%);

- Those most likely to believe that the industry is comprised of companies that are ***not*** good employers (21%) are from British Columbia (26%) and Québec (24%);

- Those who are most likely to believe that the industry is ***not*** making a good contribution to Canada's economy and job creation (20%) are slightly more likely than the average to be from Saskatchewan/Manitoba/Québec (22%);

- Those most likely to believe that the industry is ***not*** innovative (45%) are from Québec (47%);

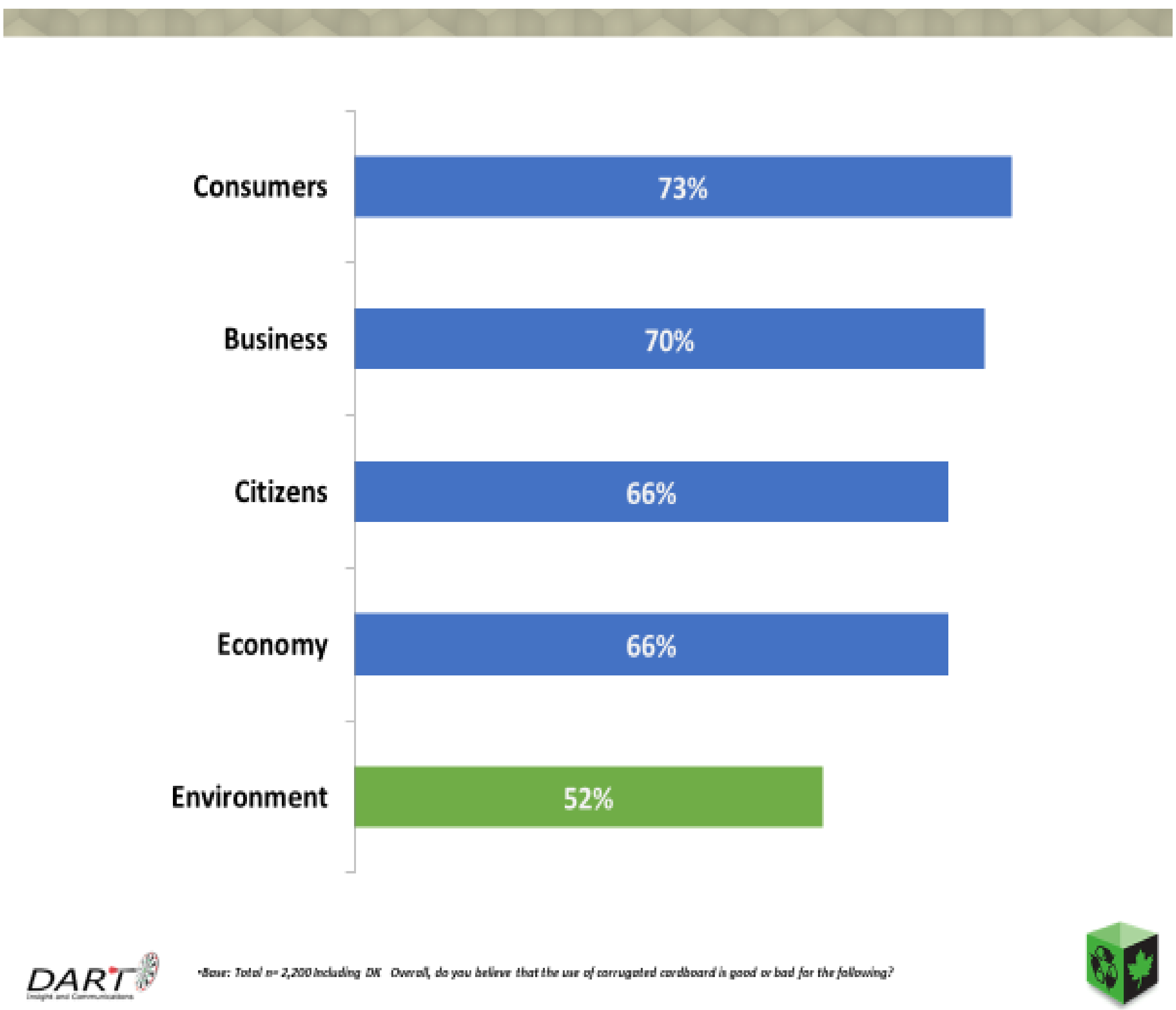
- Those most likely to believe that the industry is ***not*** good at listening to the public (40%) are from British Columbia (46%); and,

- Those who were most likely to believe that the industry is ***not*** comprised of good leaders/decision-makers (30%) are averaged out across the country with no distinguishing area or region.

The Use of Corrugated Cardboard is Good for…

Among all millennials, the use of corrugated cardboard ***is good for consumers*** (73%), business (70%), citizens (66%), the economy (66%) and the environment (52%).

- Those millennials who are most likely to believe that corrugated cardboard is ***good for consumers*** are most likely to be from Alberta (77%) while least likely from Ontario/Québec (71%.)



- Those millennials who are most likely to believe that corrugated cardboard ***is good for business*** are most likely to be from British Columbia/Alberta (74%) at least likely from Saskatchewan/Manitoba (66%.)

- Those millennials who are most likely to believe that corrugated cardboard ***is good for citizens*** are most likely to be from Columbia/Alberta/Québec (67%) and from Saskatchewan/Manitoba/Atlantic Canada (64%.)

- Those millennials who are most likely to believe that corrugated cardboard ***is good for the economy*** are most likely to come from Alberta (71%) at least likely from British Columbia (62%.) ***And finally,***

- Those millennials most likely to believe that corrugated cardboard is good for the environment are from Québec (55%) at least likely to come from Saskatchewan/Manitoba. Ultimately, those least likely to believe that corrugated cardboard is good for the environment (35%) are most likely to be from British Columbia/Saskatchewan/Manitoba (37%.)

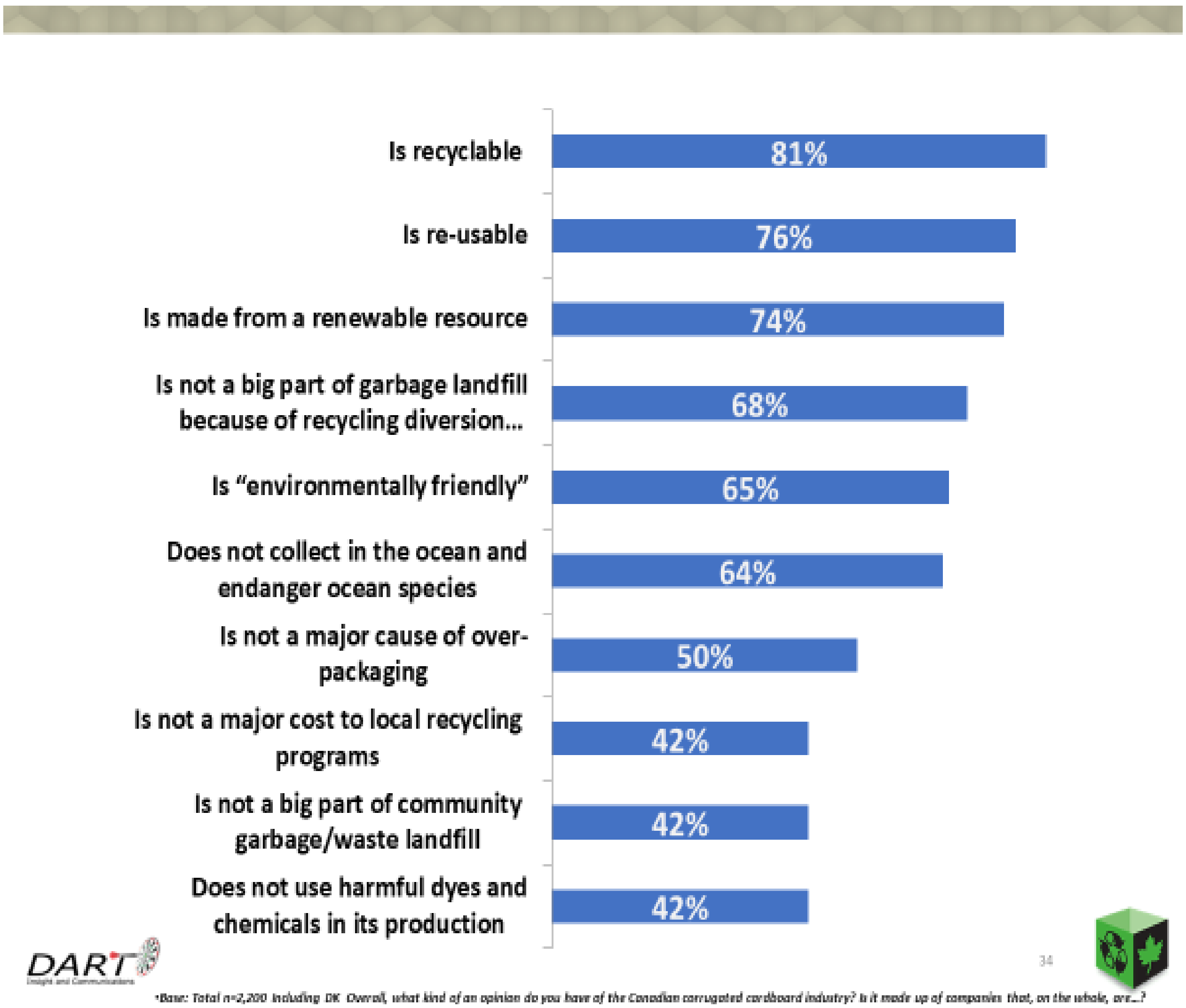
How they View the Product and the Business/Sector

This next section of the report provides an overview as to how millennials view both the product and the business/sector across the country. The charts illustrate a ranked order of contrasts between positive and negative attributes.

Each one of the attributes was randomized among the sample so that there would be no interitem bias, and split samples were used in order to further ensure a balanced response.

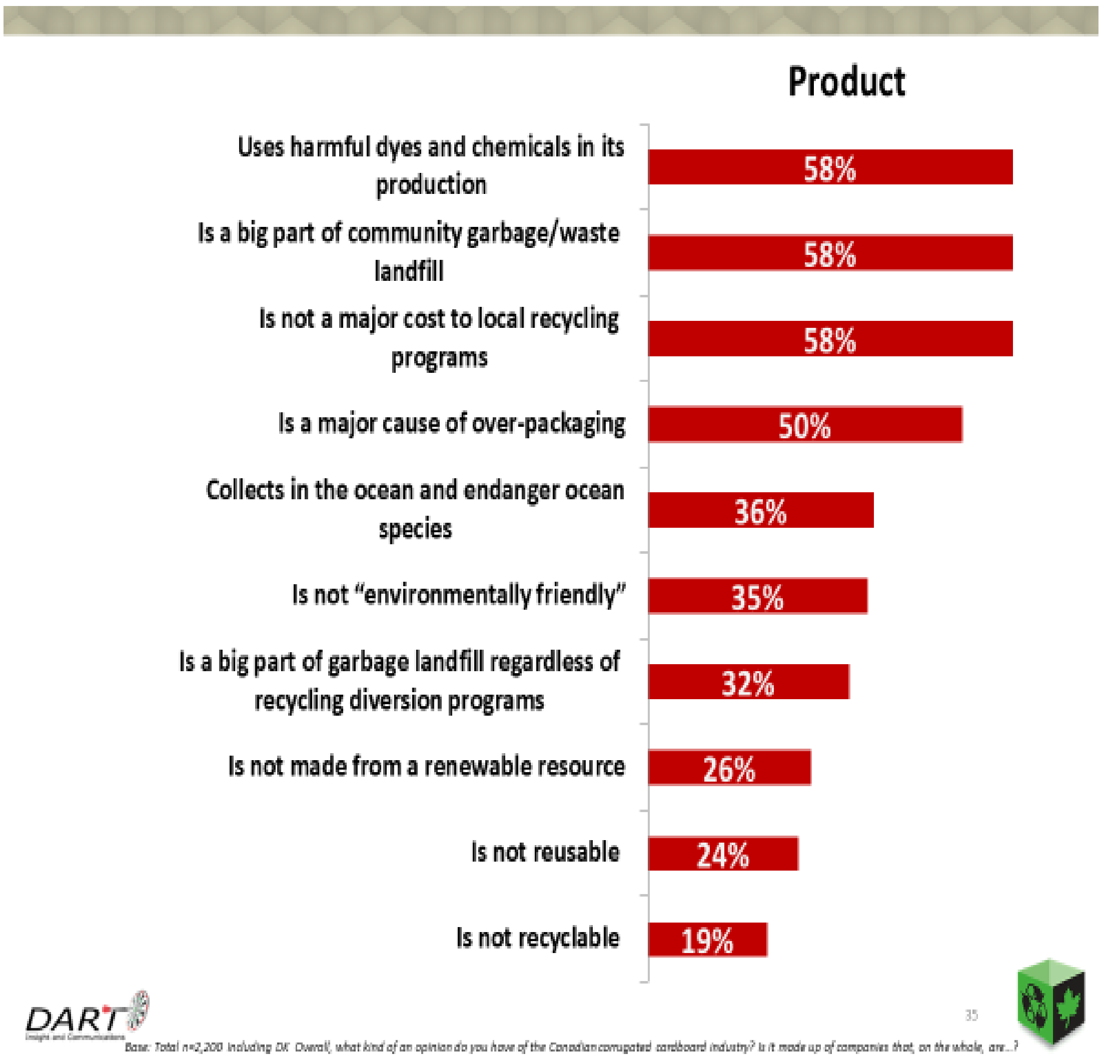
Positive Perceptions of the Product…

The following are the product attributes that were tested with the ***positive responses yielded in ranked order***. Six of 10 of the attributes fall within positive perceptions held by at least two thirds of millennials whereas four in 10 fall within 50% or less – with particular note for local recycling issues and harmful dyes and chemicals in production that are weaker compared to others.



Negative Perceptions of the Product…

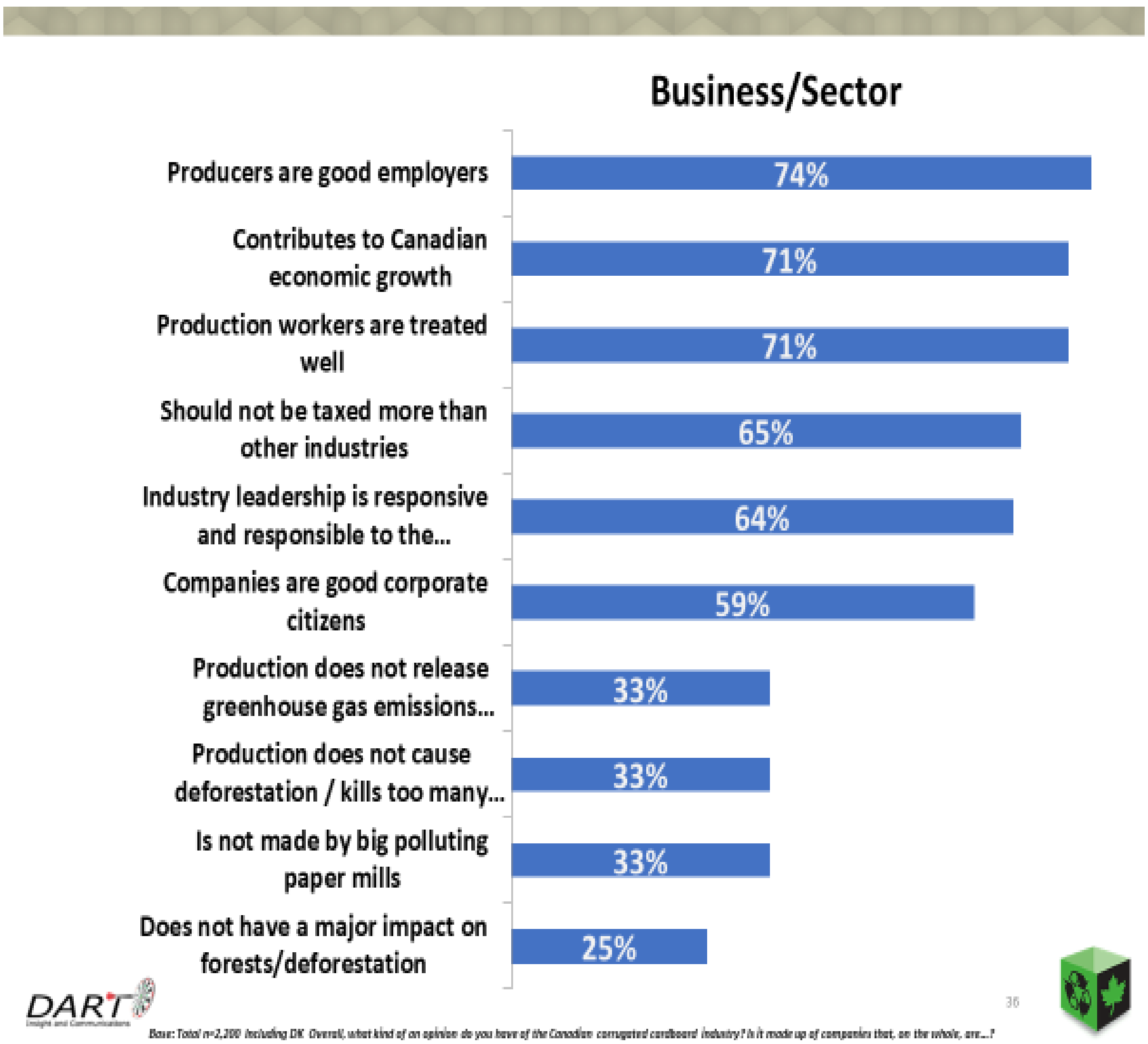
The following chart is the mirror opposite of the positive attribute perceptions noted above. The findings identify four major areas of concern related to the product – one of which deals with dyes and chemicals while the other two have to deal with local recycling programs and landfill.



It should also be noted that while corrugated cardboard received good marks in the previous sections when it came to overall packaging comparisons with other materials, it was also the case that only half of millennials believe that corrugated cardboard is good for the environment. These two factors appear to be at play with the view among respondents that corrugated cardboard is a major cause of overpackaging.

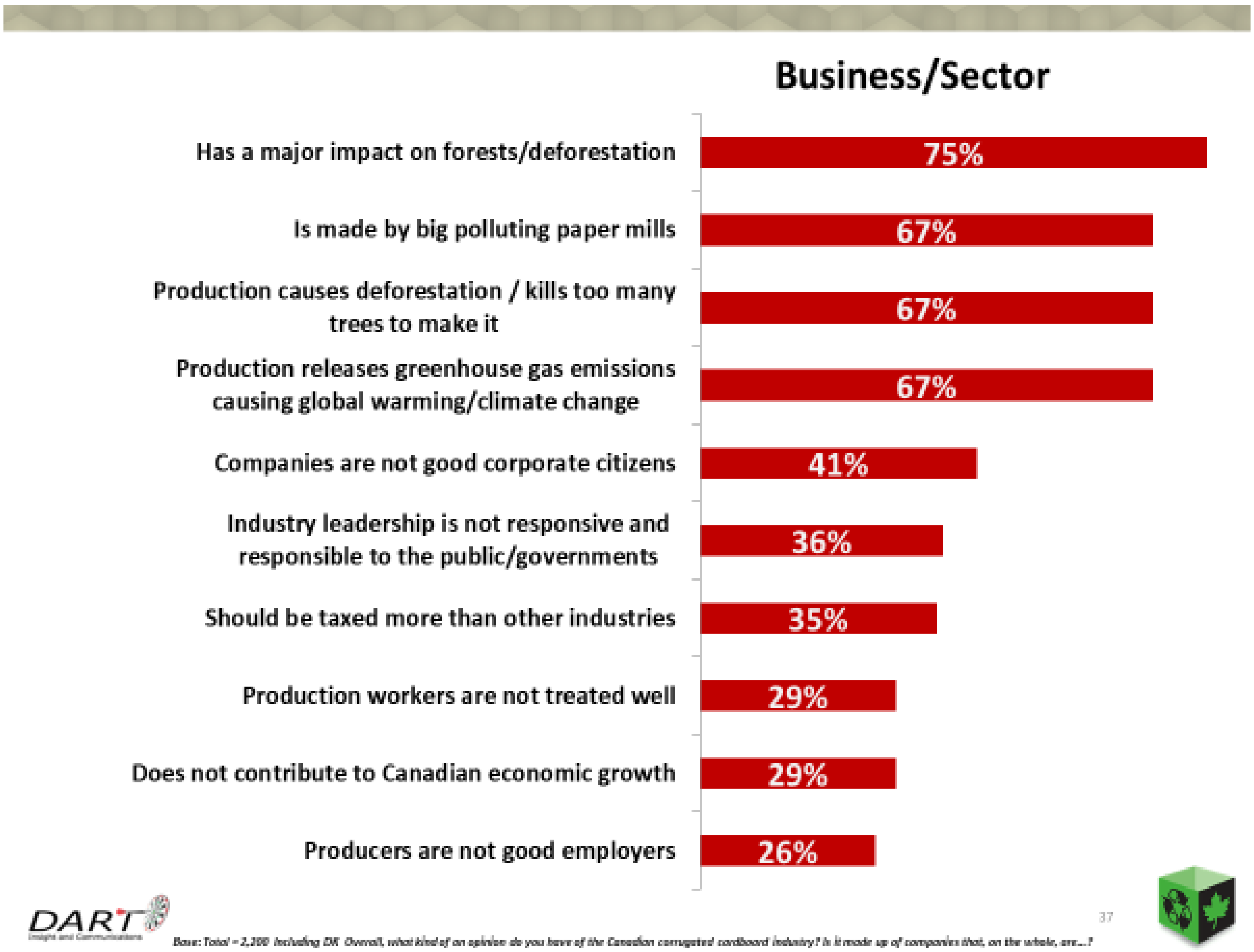
Positive Perceptions of the Business…

The next section of the report ranked the positive attributes associated with the business/sector. What becomes apparent in this chart is that those attributes receiving the least amount of support relate to production of the materials and its impact on forests and the environment:



Negative Perceptions of the Business…

Much like the chart comparison above with respect to cardboard products, the following is a mirror of the attributes noted above. This list accentuates the negative perceptions which are clearly mired in the production aspects of the business. Notably, only one third (35%) believe that the industry should be taxed more than others.

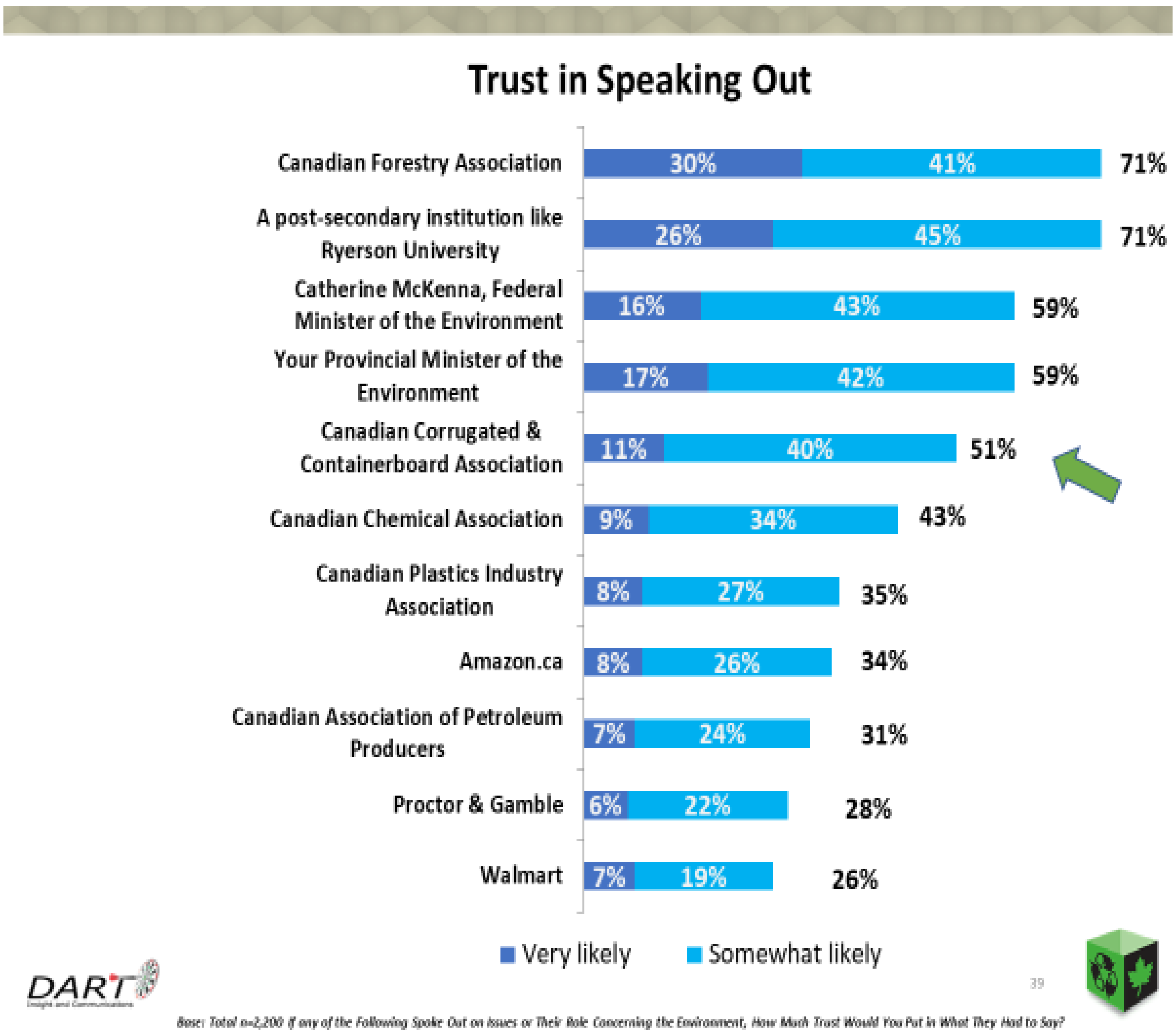


As noted above, the primary purpose of this survey was to identify key messages which may be employed by both the industry association and by its members in order to counter negative stereotypes and perceptions. These communications messages are calibrated to be used for regional and local responses and follow in the next section.

Messaging Trust

If Any of the Following Spoke Out on Issues or Their Role Concerning the Environment, How Much Trust Would You Put in What They Had to Say?

Trust marks are more important than trademarks when it comes to communications with millennials and most other Canadians. Believability is a critical currency that the Association and its members must have in order to be listened to on issues that matter.



On a relative basis, the findings show that the industry has a good platform to work from when it comes to being trusted when speaking out on issues of the environment.

What's important about these findings is the affinity that the corrugated cardboard industry can have with the forest industry and academic institutions. It's clear from the findings above that concern about the ***production*** of corrugated cardboard is ***higher than that of the product and the business itself***.

From a communications messaging perspective, it may be particularly worthwhile for the Association to consider leveraging any relationships it has with the Forest Industry Association and academic institutions where joint communications efforts might be pursued for mutual benefit, especially via the ranked national messages noted below.

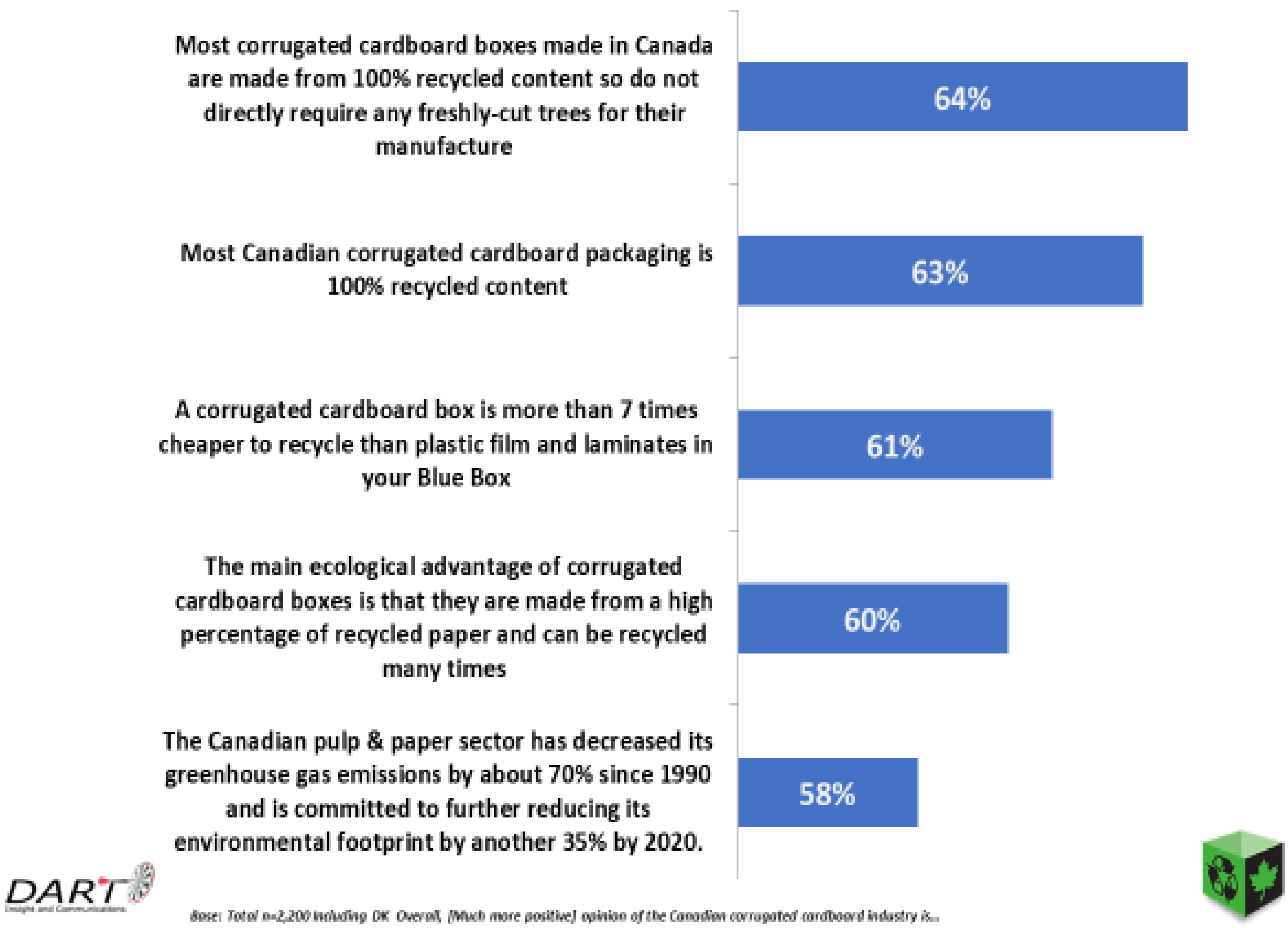
National Messaging.

A series of "messages" were tested to identify which would make a more positive impact on respondents about their impressions of the product/business/sector. Placed at the end of the fully "contaminated "questionnaire, respondents were provided with a randomized list of statements. The statements were then ranked in order of impact. They were also cross matched against the segmentation target and filtered by region.

The results – based on statements of fact – created a tiered set of messages that can be used across the country with very little change in emphasis – with the exception of Québec where a separate set of tiered messages is provided herein. The first-tier messages have the largest impact on moving opinions to a more positive level and therefore should be employed to form an overarching narrative with others used at the local level for public relations efforts wherever necessary.

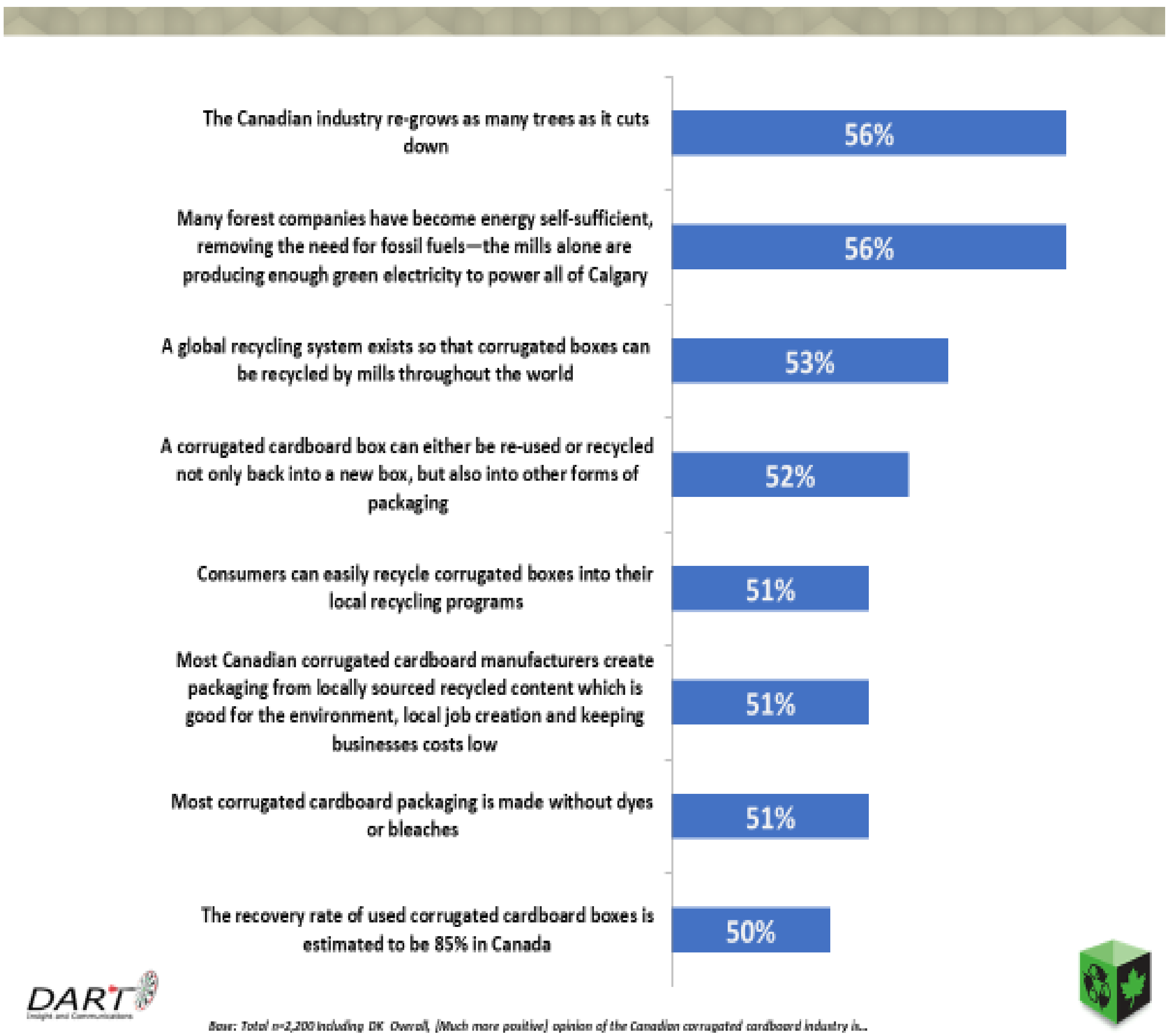
Tier 1 Messaging – National…

The following are the most potent influencing messages that should be used in calibrating communications efforts aimed at the millennial population. By fashioning communications efforts using these Tier 1 statements, many concerns previously noted above can be improved in an effective manner. Integrating these messages among communications that member companies and stakeholders undertake generally with their brand or otherwise can also amplify the impact.



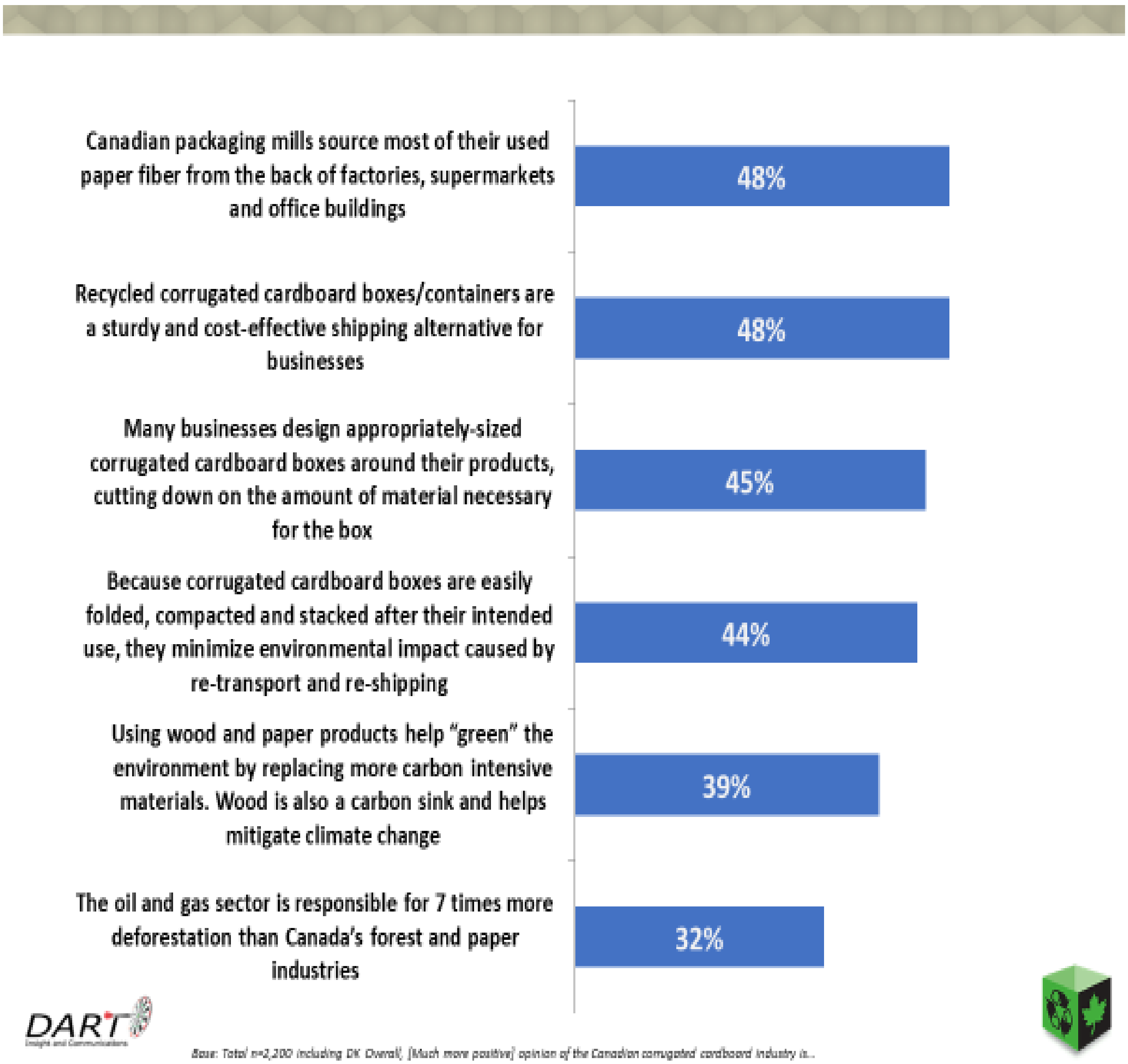
Tier 2 Messaging – National…

While the Tier 1 messages should be the focal point of any undertakings, the following Tier 2 messages also have some potency and should be utilized for communications, especially at the local level where necessary.



Tier 3 Messaging – National…

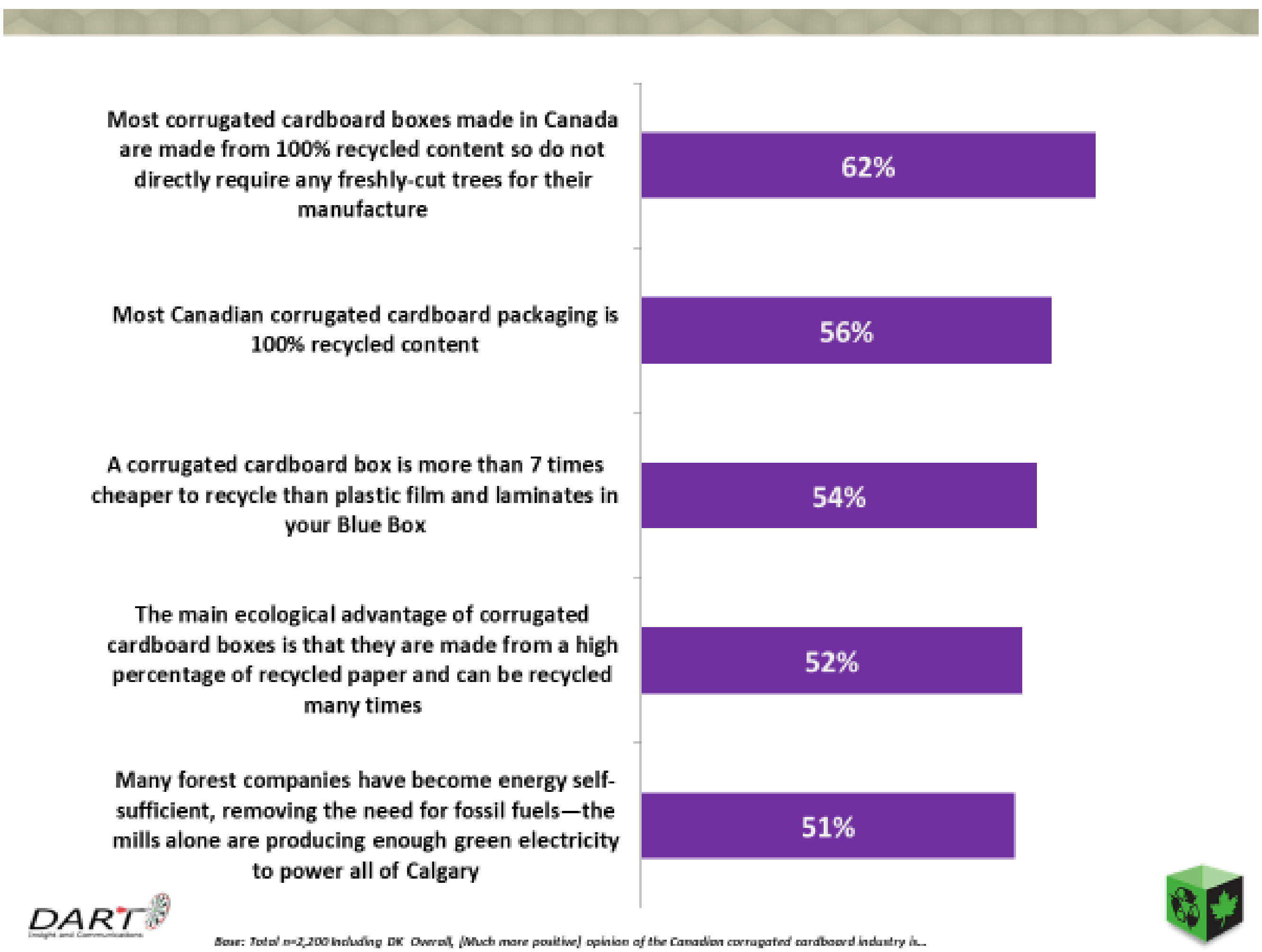
The following are the Tier 3 national messages which have less than optimum impact when compared to Tier 1 and Tier 2 messages.



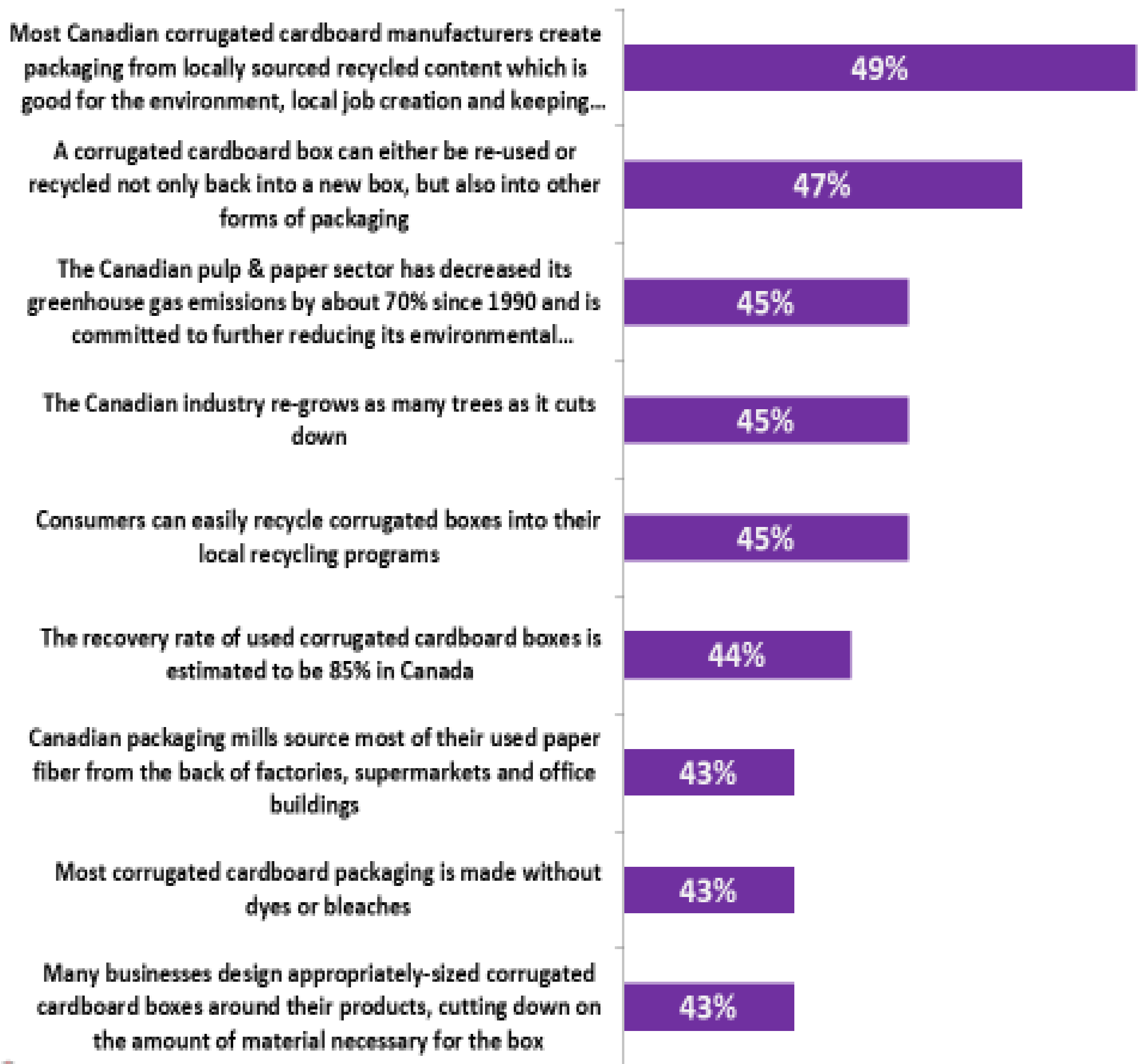
Quebec Messaging

While the province of Québec shares many of the same views as the rest of the country, it does have a few messages which correspond to different ranked concerns within its own borders. To be clear, Québec is not an outlier to all of the other provinces in a dramatic fashion whatsoever. However, there are some issues that suggested nuance to the messages that should be delivered in order to ensure an optimum positive response by millennials who live in the province. The following are the messaging Tiers for Quebec communications efforts:

Tier 1 Messaging – Quebec…

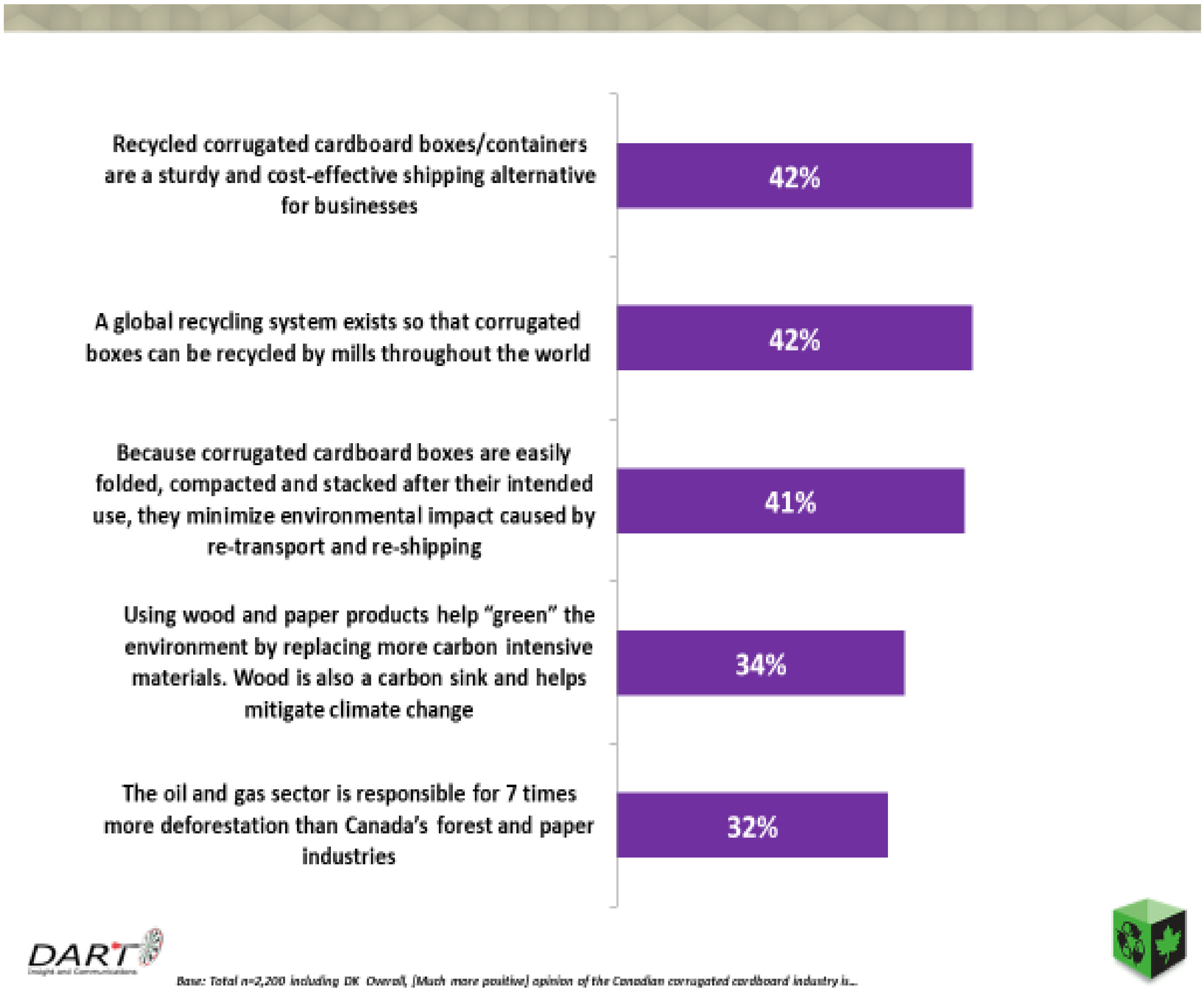


Tier 2 Messaging – Quebec…



Base: Total n=2,200 including DK Overall, (Much more positive) opinion of the Canadian corrugated cardboard industry is...

Tier 3 Messaging – Quebec…



Study Questions and Detailed Tables…

The study questions and the data detailed tables are provided under separate cover. A PowerPoint presentation was also made of these findings and was provided to the CCCA Executive.

This study and report are provided by DART Insight and Communications by

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