



From mystery to message: How talking about packaging recyclability can positively impact your brand

Lessons from the front lines



Introduction

For over a decade, ERM Shelton has been asking people about their feelings and beliefs regarding recycling.



Methodology

This report incorporates data from several of our annual Eco Pulse® surveys, including in 2024 when we surveyed countries around the globe.

However, in this report, we focus exclusively on the U.S. results from our Eco Pulse® surveys.

- The 2024 online survey was fielded from 4/22 – 4/30, 2024, surveying 2,063 U.S. respondents.
- The U.S. margin of error is +/- 2.2%.

Introduction

For the past 3 years, ERM Shelton has also been surveying primary grocery shoppers who purchase canned food to track the impact of our Canned Good campaign.

Data was collected nationwide with quotas for geographies based on messaging tactics:

- Organic/influencer
- Paid programmatic and social
- Paid programmatic, social and retailer support

Methodology

This report incorporates three years of Canned Good research:

- Both a pre and post survey were conducted in 2022:
 - Pre: Fielded from 2/16 – 3/10, 2022, surveying 1,988 respondents
 - Post: Fielded from 4/27 – 5/14, 2022, surveying 2,000 respondents
- Surveys conducted in 2023 and 2024 were fielded from:
 - 4/27 – 5/15, 2023, surveying 2,000 respondents
 - 4/24 – 5/9, 2024, surveying 2,000 respondents
- The overall margin of error for each year was +/- 2.2%



We see in our research that just about everybody in America **(94%)** thinks recycling helps the environment.



And we know that recycling makes **76%** of people in America feel better about the things they purchase or consume.

Source: Eco Pulse® 2023 (Global)

How much do you agree or disagree with the following statements – Recycling makes me feel better about the amount of things I purchase or consume. USA n=1,005

This means that recycling has been a get-out-of-guilt free card for decades.

In other words, companies have been able to imply, “Buy all you want! When you’re done with it, don’t feel bad. Just drop it in the magical blue bin!”

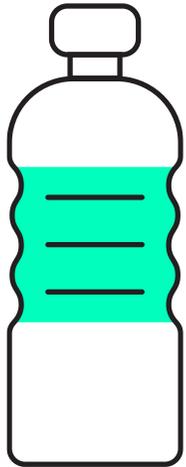


But there's a problem.

Too often people don't understand what packaging can be recycled.

The blue bin is a **mystery** to many.

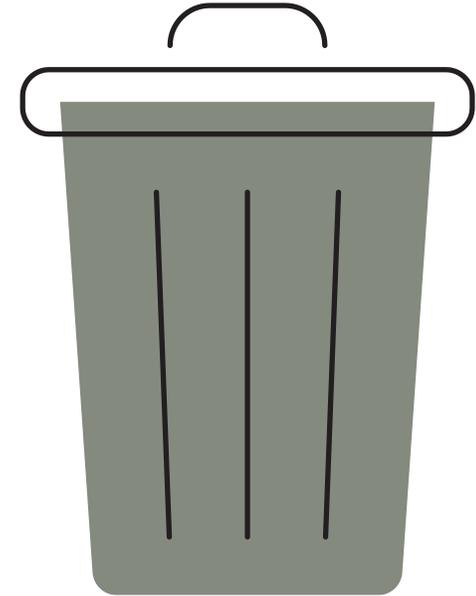
To be fair, there is some packaging that people get right.
Almost everyone gets that water and soda bottles should go
in the recycling bin.



Where does this go?

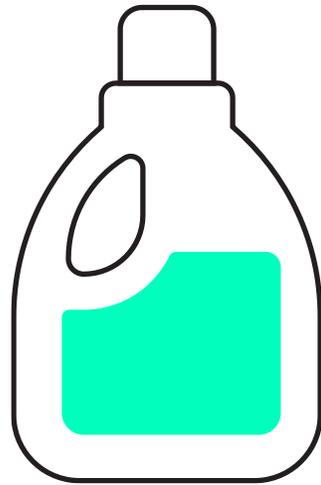


94%



6%

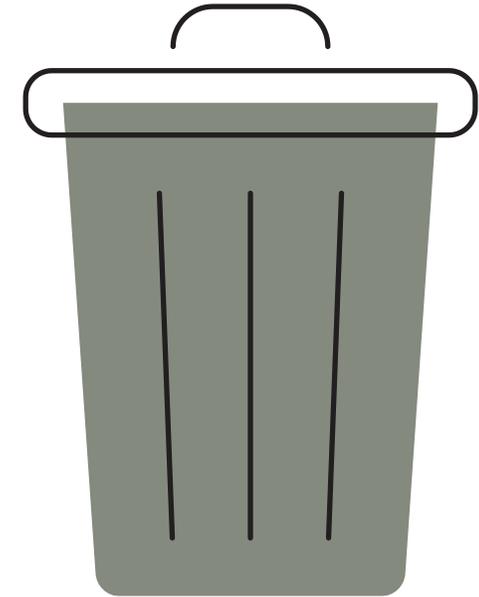
But with different packaging, people become less certain. In most places, this laundry detergent bottle goes in the blue recycling bin, but fewer people are sure about it.



Where does this go?

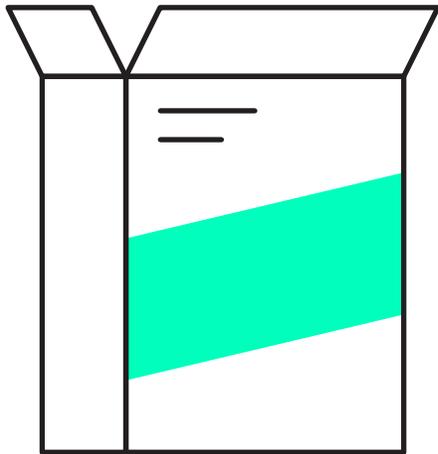


85%



15%

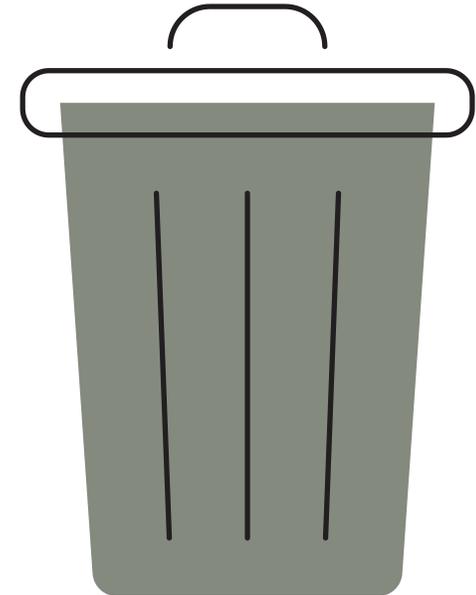
The same is true for this cereal box. Cardboard is an easy-to-recycle material, yet a little over a quarter of Americans think it belongs in the trash.



Where does this go?

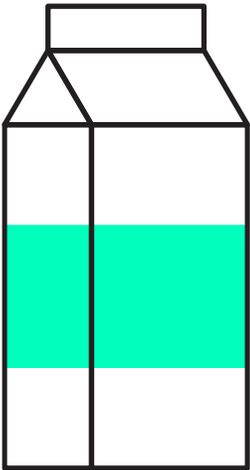


72%



28%

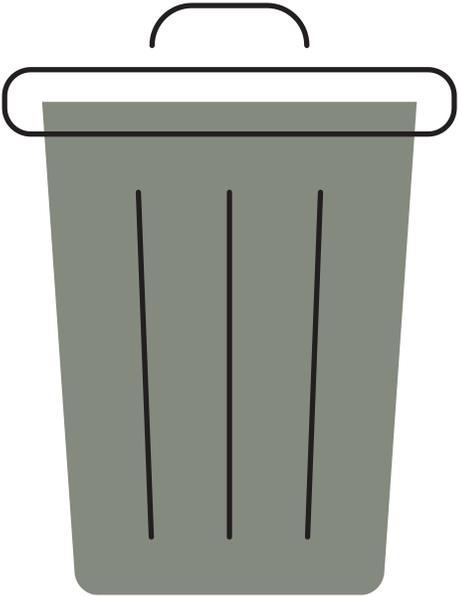
With cartons, they can usually be recycled. But over a third of Americans think they should go to the trash.



Where does this go?

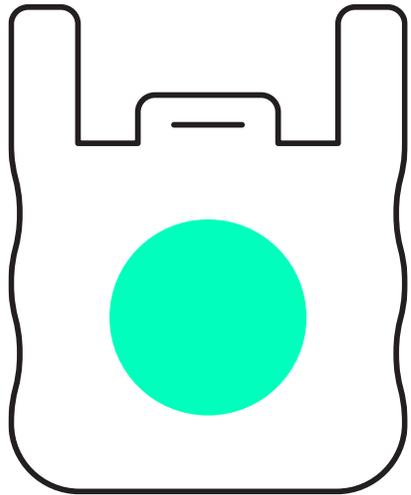


66%



34%

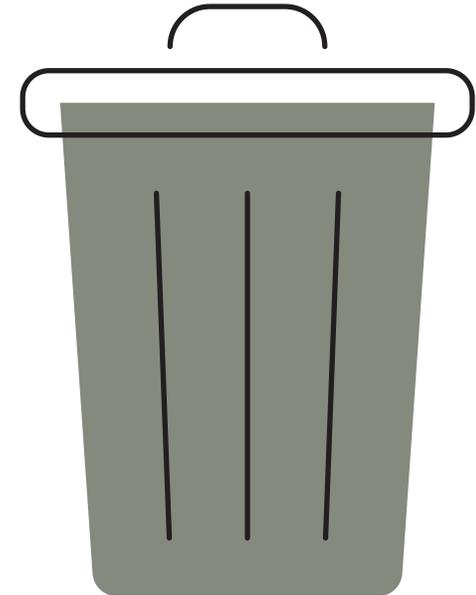
It gets especially tricky with harder-to-recycle items. Most municipal recycling systems do not accept plastic bags (but local grocery stores often do!) – yet the majority think the blue bin is right. It's not.



Where does this go?

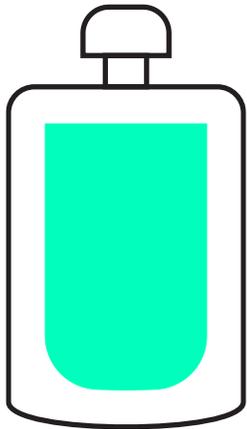


68%



32%

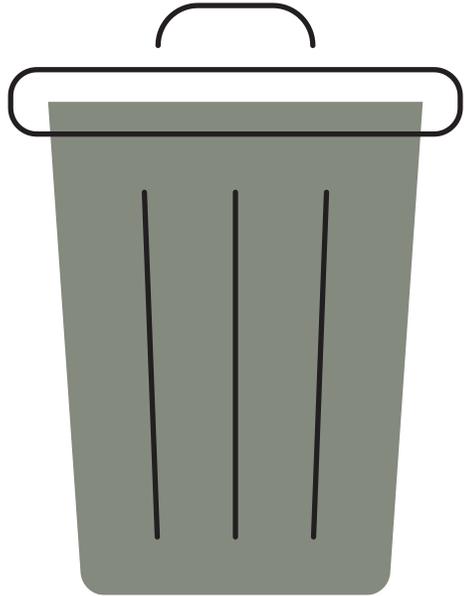
Then there's the pouch, a type of packaging that most municipal recycling systems do not accept at all. Yet nearly two-thirds of Americans think pouches should go in the blue bin.



Where does this go?



64%



36%



With all this confusion, it's not surprising that people are increasingly skeptical about recycling.

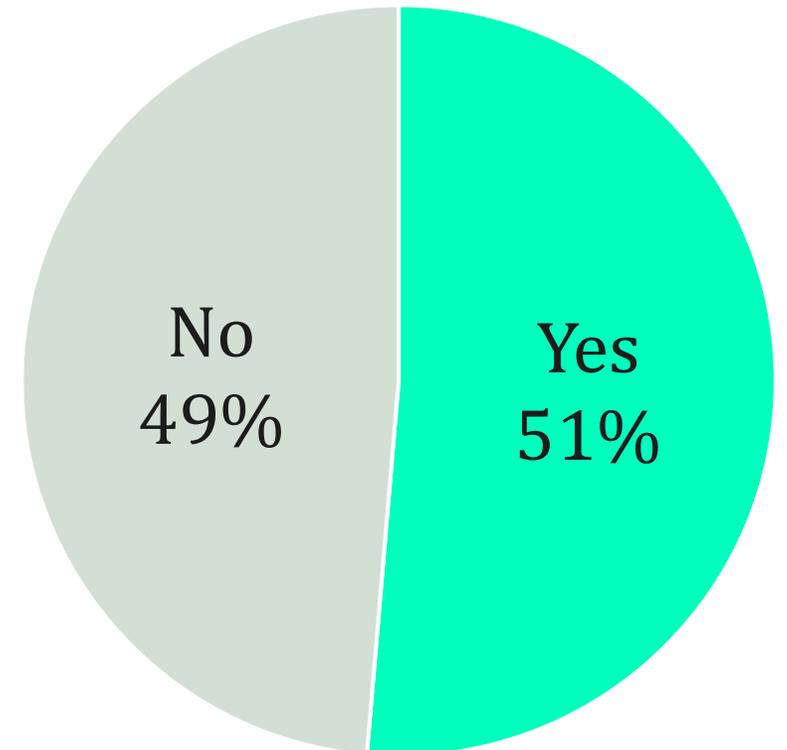
In 2019, 14% said they weren't confident that what they toss in the blue bin was actually recycled.

In 2020, that number grew to 23%.

As of 2023, it was 32%.



Do you think the recycling system in America is working well?



In fact, people in America have come to believe that the recycling system is broken.



As a result, people are giving up. Even on the easy stuff.

10 years ago,

67% of Americans

claimed they always recycled easy-to-recycle items like newspaper, cardboard, aluminum cans, plastic bottles, etc.

Now that number is only

39%.

Source: Global Eco Pulse® 2024

Please check any eco-friendly habits that you have adopted. USA n=2,063

Simply put:

People are confused about
what materials to recycle,
making the blue bin a mystery.

But people aren't looking in the mirror or working to
educate themselves.



At the end of the day, they hold companies accountable.

61% of Americans

hold companies strongly/very strongly responsible for making changes that would impact the environment.



And more specifically

69% of Americans

hold companies some/very much responsible for the end-of-life disposal of the products they manufacture.

This means two things:

1)

People are confused about what materials they can recycle, and they **no longer feel the guilt-free relief** that recycling used to give them when buying stuff (and no brand wants people to feel guilty buying their products).

2)

They don't blame the failure of recycling on themselves – **they blame companies**. This erodes trust and devalues brands.

The confusion about the recycling system is hurting brand perceptions.

What can brands do to turn this around?

Here's a great example:

Meet Canned Good.



ERM Shelton partnered with the Can Manufacturers Institute and canned food brands to tell the infinite recyclability story of **the steel food can.**



As we just saw, Americans are confused about the recyclability of various packaging materials.

Prior to our campaign, only 3% believed that steel was the most likely material to get processed by a recycling center to become a new product.

But in reality, 75% of all steel ever produced is still in use today, and at 58%, steel food cans have the highest recycling rate of any food packaging.

Source: Recycling Pulse 2022

Based on what you know, which one of these materials do you believe is most likely to get processed by a recycling center so it can become a new product? (Choose only one) (n=1,001)

Canned Good was a three-year campaign, running from 2022 to 2024. We wanted to do three things:

1)

Increase awareness of the infinite recyclability of the steel food can.

2)

Utilize retail and digital media to drive preference.

3)

Increase canned food sales based on recyclability messaging.

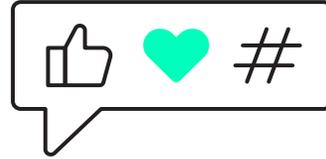
This campaign had strong cultural context: The recent global pandemic created a surge in canned food purchases — including people who may have avoided buying cans in the past.

Through our research, we saw an opportunity to target people who were:

- 1) new to purchasing food in steel cans and
- 2) lapsed can buyers who were now purchasing steel cans again.

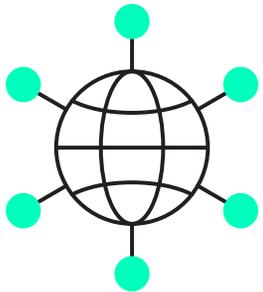


Social and digital ads

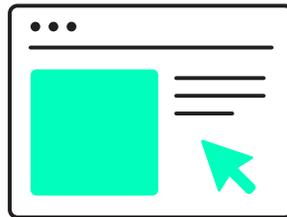


Influencers

Our
approach



Owned channels



Complete website — with a portal for partners to access campaign materials to push out organically

We also partnered with retailers during key promotions and activation periods.

And we didn't take ourselves too seriously.

Click [here](#) to experience our creative work behind the Canned Good campaign

Experience CANNED GOOD →



The Canned Good campaign worked!

People who were familiar with the campaign reported an increased understanding of the infinite recyclability of the steel food can.

How confident are you that steel actually gets recycled when you put it in the recycling bin?

% somewhat/very/extremely confident from Post 2022 to 2024

	Organic Social (National)		Paid Programmatic and Social (Digital)		Paid Programmatic and Social + Retailer Support (Digital <u>InStore</u>)	
	Not Familiar with Canned Good	Familiar with Canned Good	Not Familiar with Canned Good	Familiar with Canned Good	Not Familiar with Canned Good	Familiar with Canned Good
Steel	71%	76%	68%	76%	69%	77%

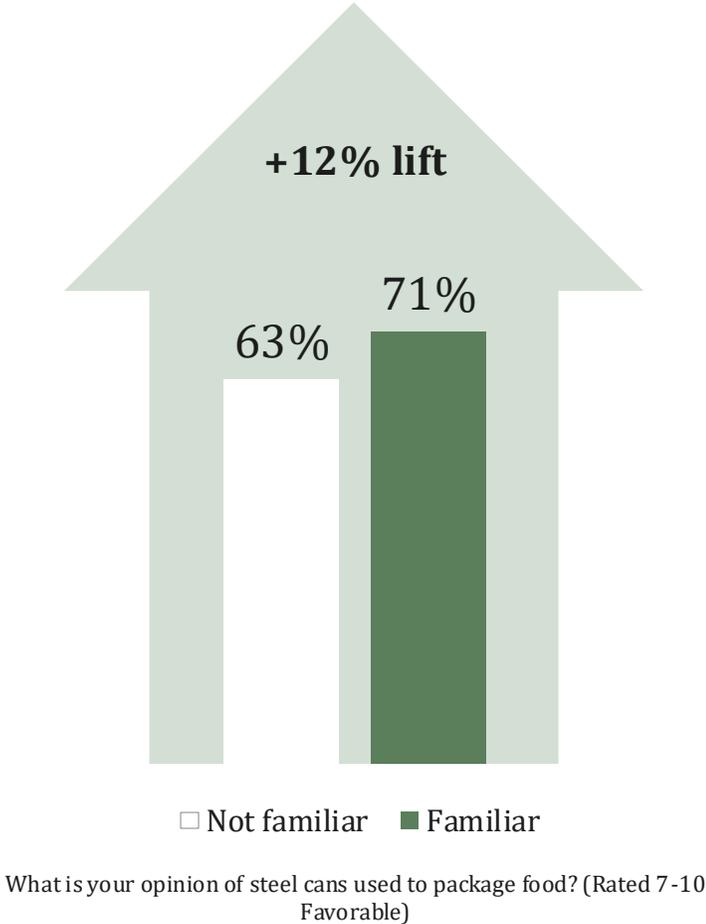
Source: Canned Good Research (2022-2024)

How confident are you that each of the following packaging materials actually gets recycled when you put it in the recycling bin?

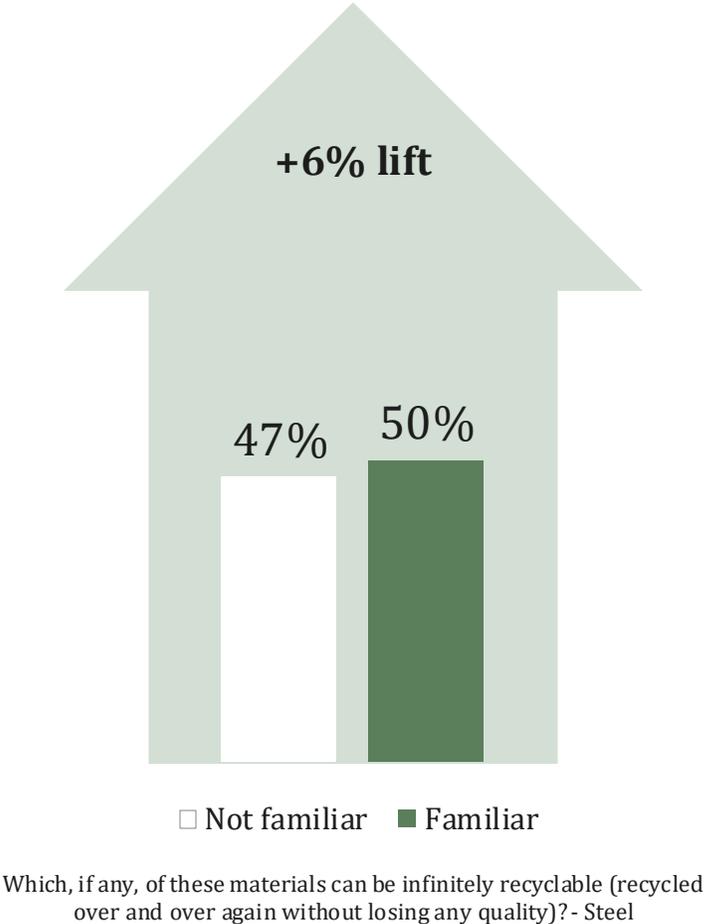
Not familiar n=3,514; Familiar n=2,488

The campaign consistently delivered recyclability awareness and favorability for the steel food can.

Favorability of the steel food can

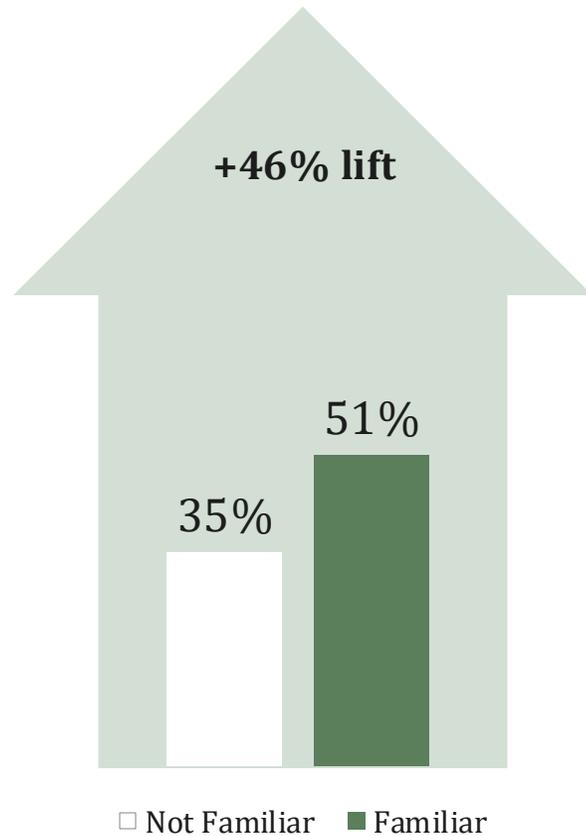


Infinitely recyclable

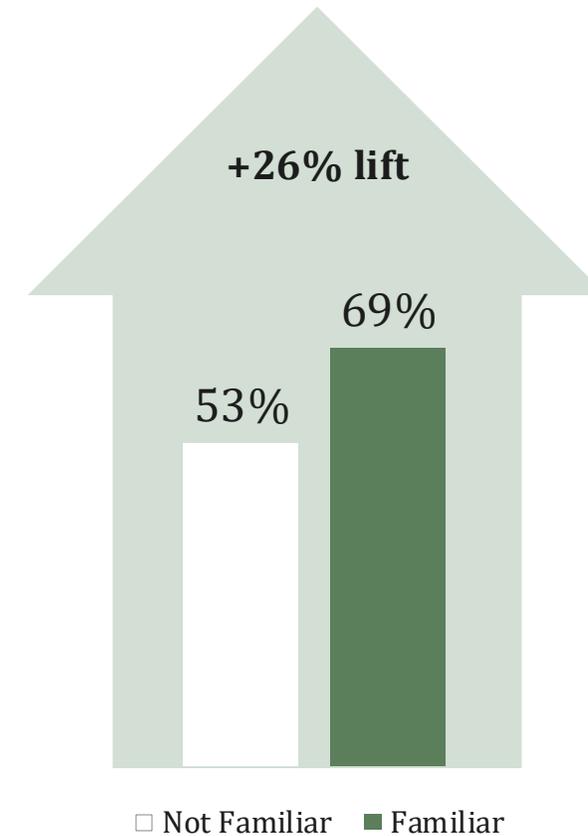


Familiarity with the campaign also increased preference for the steel can and empowerment to improve the environment.

Steel cans are preferred over other food packaging options in my household



Steel cans help me feel empowered to do my part for the environment because they are infinitely recyclable



Source: Canned Good Research (2022-2024)

Which of the following describes your familiarity with the phrase "Canned Good"?

How much do you agree or disagree that each of the following statements describe steel cans used to package food?

Not familiar n=3,514; Familiar n=2,488

And sales went up!

RETAILER 1, SPRING 2022

+13% sales lift in store and +41% sales lift online

RETAILER 1, SPRING 2023

+6% sales lift in store and +6% sales lift online (with no offer attached to the campaign, like in 2022)

RETAILER 1, FALL 2023

+12% sales lift in store and +36% sales lift online (with no offer attached to the campaign, like in 2022), along with additional brand awareness created through social advertising

RETAILER 2, SPRING 2022

22% to 52% sales lift in store

RETAILER 3, FALL 2022

75% sales lift along with additional brand awareness created through digital advertising

RETAILER 3, FALL 2023

+75% sales lift along with additional brand awareness created through digital and social advertising

RETAILER 4, FALL 2023

5% sales lift in store

RETAILER 5, FALL 2023

129% sales lift

RETAILER 6, SPRING 2024

317% sales lift

Source:

Retailer 1: Internal consumption data from April 2022, April-May 2023, and September-October 2023 activations

Retailer 2: IRI data from April 2022 activation

Retailer 3: IRI data from October-November 2022 and September-October 2023 activations

Retailer 4: Internal consumption data from September-October 2023 activation

Retailer 5: Internal consumption data from September-October 2023 activation

Retailer 6: Internal consumption data from February 2024 activation

All Retailers: Combined Canned Good Coalition CPG Partner's unit sales lift during activation period vs. same period the year before

Plus ...

54% of those familiar with Canned Good

were willing to pay \$0.45 more per can after learning
about steel cans' recycling attributes.

Source: Canned Good Research (2024)

Economic conditions are causing the price of goods to go up. If the price of a typical canned food increase from \$1.48 to \$1.93, would you still buy your typical canned foods even with this kind of increase? n=782

It makes sense that the campaign, dedicated exclusively to the steel food can's recyclability, increased people's understanding of the can.

But the greatest surprise of our Canned Good campaign happened beyond the steel can.

As people became familiar with the campaign, **their confidence about the recyclability of other packaging materials increased, too.**

How confident are you that each of the following packaging materials actually gets recycled when you put it in the recycling bin?

% somewhat/very/extremely confident from post 2022 to 2024

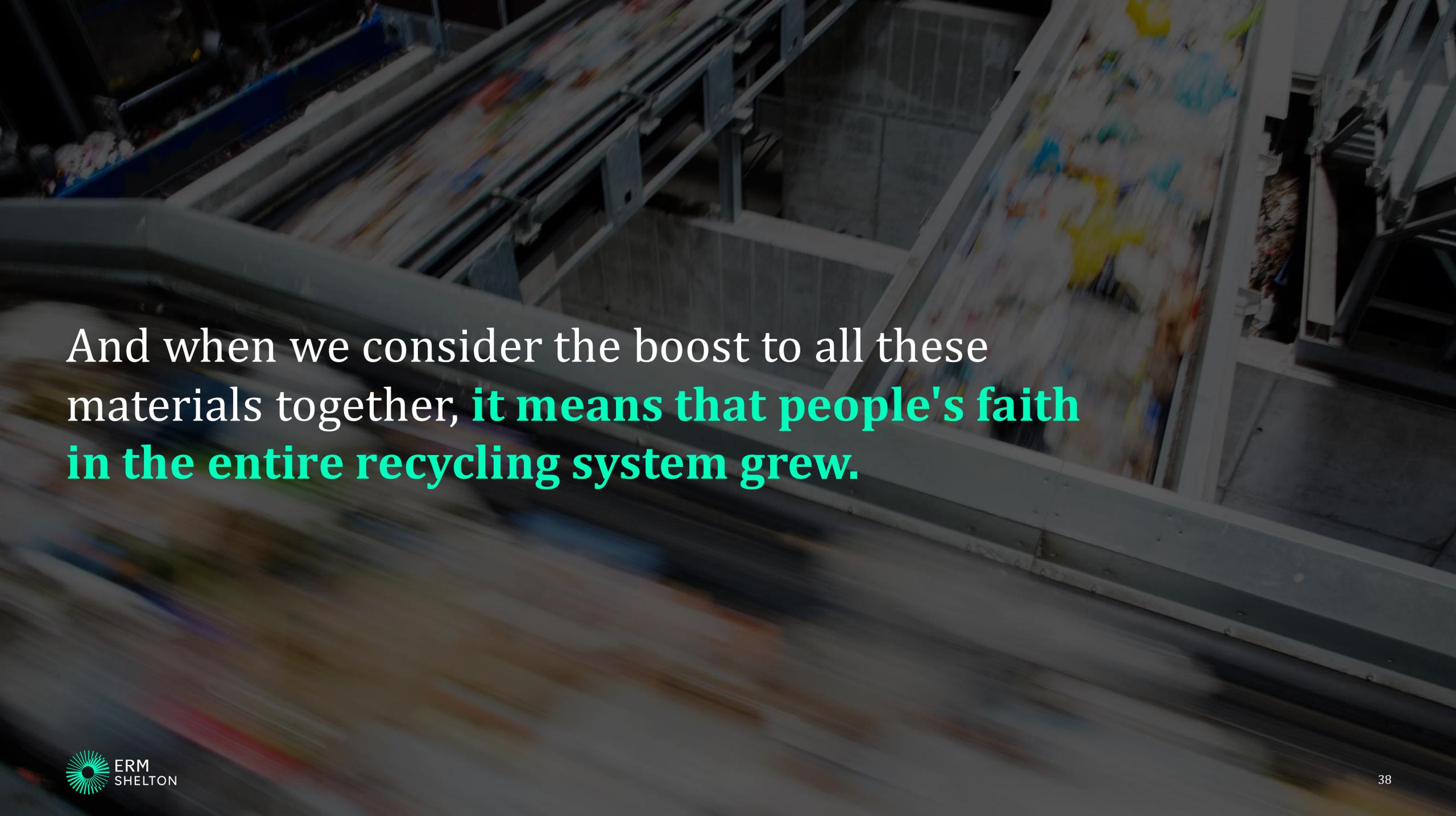
All markets grouped together		
	Not familiar with Canned Good	Familiar with Canned Good
Steel	66%	76%
Aluminum	76%	87%
Paper	67%	79%
Glass	68%	76%
Carton	60%	74%
Plastic	58%	72%

So let's recap

How did the Canned Good campaign take consumers from mystery to message?

The steel can *did not change*. People's *understanding* of its properties changed. **Truthful messaging about packaging recyclability works.**

And once people understood the recyclability of one kind of packaging material, **their confidence in recycling other materials grew.**



And when we consider the boost to all these materials together, **it means that people's faith in the entire recycling system grew.**



This means that strong,
substantiated recyclability claims
empower consumers – and your brand.

Thank you

ERM Shelton is the nation's leading marketing communications firm exclusively dedicated to the sustainability sector. We create a market advantage for organizations that are creating a sustainable future.

We gather rich market insights that help you make the right environmental and social purpose commitments, develop more environmentally friendly products, evolve what your brand stands for and fuel the right stories and market engagement campaigns – all so people will want to buy from, work for and invest in your organization.

Learn more at sheltongrp.com.

Check out Canned Good for yourself at CannedGood.org.

Want to work with us? [Contact us here.](#)