Séissmograph 2005

The Brand Trembles – between erosion and eruption

Prologue

Background

Séissmo is an institute for tailor-made market- and social research with an emphasis on qualitative innovation research. The annual Séissmograph-report originated out of our own fundamental research, which we see as our experimental ground.

In recent years we increasingly often met consumers, who show an „unpredictable" shopping behaviour. There is, for example, the consumer, who spends a lot of money on expensive cheese, but choses the cheapest milk available. Another buys his bio-products on the weekly market, but takes his bread home from the „budget bakery". The classic market research, mostly **a one product centred target group assessment**, treats those kinds of behaviour only insufficiently.

We believe that from an investigation of the real consumer behaviour one can draw **important findings regarding reasoning and preferences of consumers**.

Based on this hypotheses we decided on a **innovative, so far unused surveying method: Gelbe Säcke (yellow recycling bags)** from different households of different social classes have been collected and examined, going through each with a fine-tooth comb.

Contents

I. An Innovative Data Collection Method

Initial Questions

Objective

The aim of the study is to shed light upon the **actual consumer behaviour** of the German buying public (independent of their statements in „common" surveys). In this connection we are going to formulate theses concerning **motivations for buying branded products.** This shall enable us to offer businesses tangible clues for their **target specific marketing** and provide hints for **promising product messages.**

Basic Questions:

- Does an erosion of the brand occur?
- Why has the Richter-scale shifted towards no-name products? Why do no-name products reach such heights?
- Do the tectonic plates No-Name and Brand collide or do they melt into each other?
- Which territories do no-name products occupy?
- Are there areas in which the Brand remains invincible? Under which climatic conditions can we still find it?

Methodology

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Research basis

As we repeatedly noted that consumers are, despite their good will, not able to provide detailed information about their consumer habits, we have been looking for a method to capture the real consumer behavior. Thereby we followed **completely new methodological tracks by letting the recycle bags themselves „speak" instead of the consumers**. The content of a recycle bag gives unaltered account of the waste consumption within two weeks, even though the content does certainly not represent the entire consumption.

101 recycle bags were unpacked by us during the course of the year 2005. To achieve some kind of distribution over the social classes, the rubbish was collected in different boroughs of Mannheim. The rubbish was also examined throughout different winter- and summer months to eliminate seasonal effects. Furthermore, the survey was conducted on a regular basis to include the beginning, middle and end of a month.

Based on a data pool of 4833 Items, the analysis was conducted overarching all the bags collected (quantitative analysis), as well as within one recycle bag (qualitative analysis). The combination of both research methods offers an opportunity to formulate explorative hypotheses, which can then be validated on a quantitative level.

Variables

As the social classes presumably influence the buying behavior, we have introduced three different areas in our research:

- **Socially Weak**
- **Middle Class**
- **Privileged Upper Class**

In Mannheim this distinction was **easy to operationalize via different boroughs, which are homogenous in themselves:**

- Jungbusch / Neckarstadt West
- Almenhof (refer to appendices)
- Oststadt

The total of **101 bags** was collected with roughly equal contributions from each of the three boroughs.

Surveying Methods (1)

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Handling of the recycling bags

After obtaining a license we collected the recycling bags in regular intervals from the Mannheim boroughs named above.

The content of each bag was emptied on a groundsheet. The products were listed in a chart, grouped according to their category, and then photographed (approximate time needed for each bag: 60 minutes). The pictures show each product in connection to the system of one consumer unit (the bag), and where used for the qualitative data analysis. The item charts from each recycling bag contained information about the kinds of products (e.g. Milk), the brand vs. no-name, packaging size and other striking attributes like the product's finesse or the sophistication of the packaging. All 4833 items were entered into a statistical program.

In this way **many levels of analysis** emerged:

→ On **quantitative level → general findings about the content of the recycling bag** (number of items per bag; product categories; brand vs. no-name; finesse of the recipe; added value of the packaging) **as well as summarizing findings about the 3 consumer groups** (operationalized through the different boroughs).

→ On **qualitative level → holistic view on the content of the recycling bag** under **consideration of sociological and psychological viewpoints.**

Surveying Methods (2)

The content of each bag was draped according to the same pattern and then photographed. This made it easier to assign the products to their categories and compare the contents of all recycling bags.

Product categories in the recycling bag

Every recycling bag contained in average 48 items in the form of packaging, tetra packs, bags, cans, PET-bottles, tube, crown cabs and similar items.

Generally, a separation of the items into the two areas „food" and „non-food" seemed sensible. Within this rough separation, 10 main categories* emerged form the analysis.

Food

- Milk Products (milk, yoghurt, cream cheese, yoghurt drinks etc.)
- Fruit and Vegetables (fresh, canned)
- Wheat Products (bread, noodles, cereals)
- Meat and Sausage Products
- Snacks and Sweets (ice cream, cake, cookies, savory snacks)
- Ready Meals (ready soups, sauces etc.)
- Drinks (juice, soft drinks, beer etc.)

Non - Food

- Cleaning Products
- Body Care (hygiene articles, body and face products
- Others (pet food, cigarettes, other products

*Overall, a breakdown into 43 product categories emerged.

Distribution of the product categories

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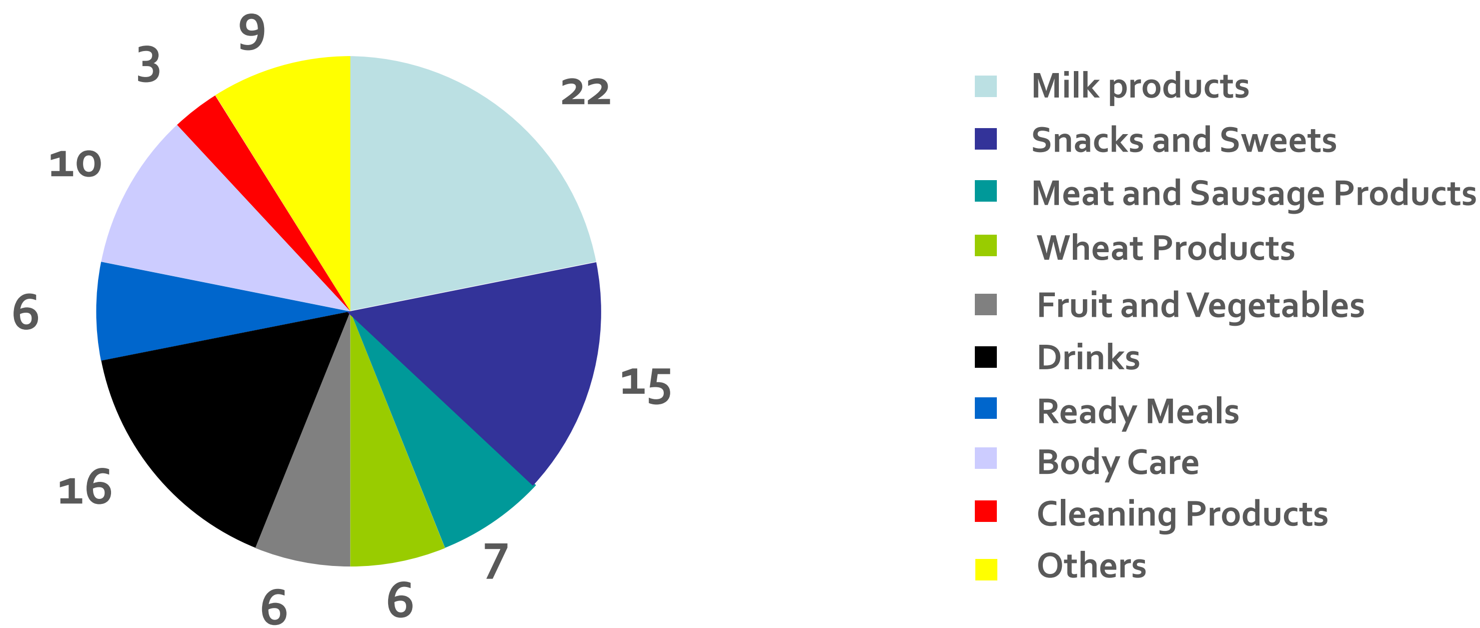
Relative percentage of the product categories



The pie chart describes the relative percentage of the product categories in relation to the total of 4833 items. Not all areas offer a sufficient case for further investigations – therefore not all themes will be discussed in the research report at hand.

II. Findings Concerning the Brand's Illness Status

1) The Brand at Half Mast

Representation of the brand in the recycling bag

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No-Name

Brands

Store-Brands[1]

Own-Brands[2]

ca. 50%

ca. 50%

In EVERY bag contained – independent of the borough they came from – **branded as well as no-name products** (store- and own brands).

The **percentage of brands** amounted to ca. **50%** and **varied strongly depending on the product category.**

[1] Store-brands: „In-house brands" of distribution chains (Ja!, Balea, Mibell, Gut und Günstig…)

[2] Own-brands: no-name products that are produced and sold on behalf of discount chains like Penny, Lidl, Aldi… (Tandil, Kokett, Milbona…)

The hybrid consumer

→ **Consumers do not buy either branded- or no-name products, but both,** which is why the term of **hybrid consumer** has been established.

The hybrid consumer moves on a spectrum from **flexible to disoriented** and

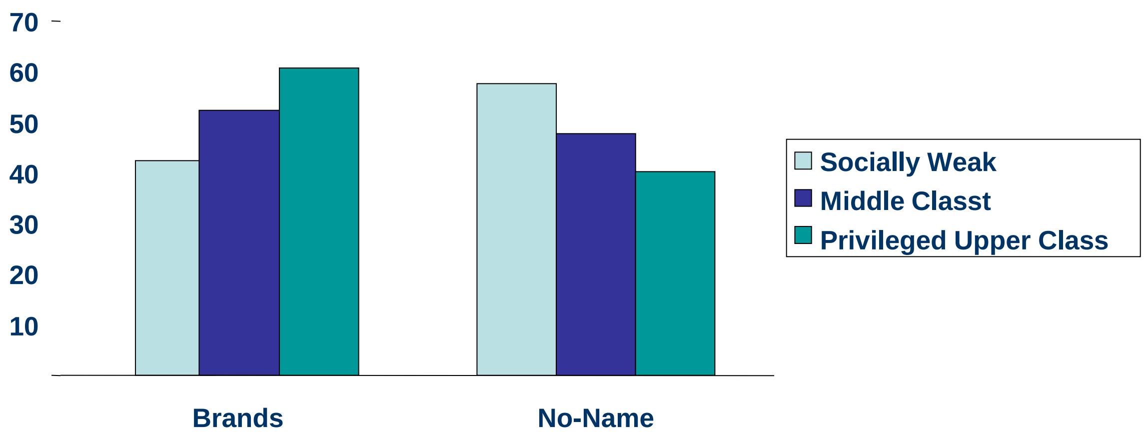
- can be met in **every class and age group**
- buys at **many different retail outlets** (in one bag products from at least three different stores can be found): targeted bargain hunt? Fun with shopping tourism? Strategic trade-offs?

At the first glance **no system** can be seen in **the shopping behaviour**. The hybrid consumer combines seemingly random brands and no-name products. At closer investigation, certain behavior structures can be identified, which allow us to shed light on wider contexts.

This means, that the established theses of the **old-fashioned classic target-group marketing** is confirmed though this surveying method, which proves its **validity**.

Brand affinity is relative

Brands and no-name products in dependence of the consumers‘ social classes



In general we can record, that **belonging to a social class** has **an influence** on the percentage of the used brands: **With a higher social class the preference for branded products increases.**

However, as there is a **surprisingly high percentage of no-name products even in the upper class**, the variable „belonging to a social class“ can explain this variance only **partly**.

Attack- and origination point of the no-name-virus

The multi-faceted range of no-name products found in the recycling bags over the course of one year was surprisingly large. Thereby the spectrum ranged from classically cheap products up to well established, highly developed no-name products with brand character.

Store- and Own-brands „pure"
→ very functional

Origin-Brands
→ country as brand

like Tchibo ‚fine Mild'

like Langnese Magnum

Imitation
→ copied brands

"No-Name-Brands"
→ own name established

low **value of the "brand"** high

Why the no-name virus becomes resistant

No-name products stand up against the brands on many levels:

- **via the impression of the packaging**
  - The puristic no-name products are reduced to the bare minimum and facilitate easy information processing and orientation.
  - The Origin-Brands use symbols associated with the product category (Italian ham in packaging with typical Italian colours) and suggest a desirable life style.
  - Imitations copy a familiar brand. The optical illusion works.
  - „No-Name-Brands“ legitimise their impact through adequate official bodies (Stiftung Warentest, etc.) and claim their own brand right.
- **via the functional value of the packaging**
  - No-Name-products have adapted quickly in this area, too: Single packaging and elaborate seals have become standard even with no-name products.
- **via qualitative innovation of the recipe**
  - Innovative recipes are a rarity with no-name products. They mainly try to copy well-proven brand recipes, being more or less successful.

No-Name products position themselves closer to the brands. This is achieved especially on the level of packaging design and functional value. **The brand can only convince on the level of quality, where it lives up to its role as an outrider by delivering continuous, consumer relevant innovation.**

II. Findings Concerning the Brand's Illness Status

2) Functioning Organs of the Brand

In these areas the brand seems to maintain its status aswell

Product category	**Brand**	**No-name**
Yoghurt drinks	73%	27%
Desserts from the fridge	71%	29%
Sweets (except chocolate)	91%	9%
Chocolate/ pralines	76%	24%
Soft drinks	71%	29%
Beer	91%	9%
Ready-made sauces	78%	22%
Ready meals	68%	32%
Cigarettes	82%	18%
Body-, face- and hair care products	75%	25%

How a strong immune system of a brand looks like

On a **rational level** the **brand** functions **as a service provider** that takes the consumer seriously:

- Brands can assert themselves not only by means of advertising, but also by showing their presence through **continuos innovation**.
- The more **complex** the **production process**, the **higher** is the **product refinement** (and respectively the public offer of reward/ communication), and the more likely is the brand purchase.

On the **emotional level** the brand achieves to **appeal to the basic psychological needs** of consumers, and reveal or awake **ever new needs**.

- Independent of the actual product, the **brand communicates values** and a **special life style**.
- **Clear communication reduces** the **flood of information** and **keeps the consumer grounded in the consumption chaos**.
- **More emotions and stimulations** are achievable through ***Sensoric Marketing***. If **all senses** are demanded, the product has **greater chances**.

A strong heart: chocolate

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5% of all items belong to the product category chocolate. It is interesting that, independent of the borough, **the brand's market share** is very high with **75%**.

In this segment the **consumer** is obviously **willing to spend money on brands**.

The brands have **not ceased to bring innovation and finesse to packaging and recipes** and have therefore been able to maintain their **continuously high value**; they have claimed several market niches, each promising rewards of different kinds. An end is not in sight, as further rewards are imaginable and clever compositions have potential to make open gaps in the market accessible.

- **Example Packaging:** From the chocolate bar to minis, which are all wrapped individually and facilitate the direct apportionment and allocation (reward and reinforcement for oneself and others).
- **Example Recipe:** original textures and consistencies, which no longer make the biting, cracking, melting and licking antipodes; mouth contrasts that re-awaken the passive-turned senses.

Annotation regarding the definition: the category chocolate is defined by the main ingredient (cocoa) and includes amongst simple chocolate also sophisticated finishing/ refinements such as chocolate bars, chocolate nuts and Belgian chocolates/ chocolates in a box

The strong heart can be identified by its good blood circulation

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The strong heart can be identified by its good blood circulation

Able and agile hands: Ready Meals

The category ready meals and ready sources includes all products that are in any form processed further or are more or less ready for consumption. More than two thirds of all instant products from our recycling bags are brands, although a large variety of cheaper ready meals are on the market.

It is striking that especially with **highly processed products** (complete meals), which only have to be warmed up or merely require the consumer to add water, **brands are chosen more often** than no-name products. **At a lower processing level** (e.g. side dishes like chips or pre-cooked noodle from the fridge), the **brand** is less **relevant**.

Different **theses**, which focus on the **various stages within the production process**, explain why the brand is superior when it comes to ready meals:

- **Better Basic Ingredients** (vegetables, meat, spices) ensure healthier eating.
- The **processing** of the ingredients is **more elaborate and caring**, so to conserve vitamins, for example.
- **Cleverer recipes** provide for a better taste experience.

→ In general the brand is obliged to offering something special to the consumer in order to legitimise the higher price.

Ready Meals

high processing level:
Brand
Maggi Cabbage Soup Asia
Knorr Citron Butter Sauce
dm

Crunchips
Knuspertaschen and croquettes
Erasco Potato Hotpot
Barilla
low processing level :
No-Name

The skin, our largest organ: Brand-body-care is for the public

Three quarters of the body care products from the recycling bags were **branded**, so body care seems to be a case for brands. But where does this preference for brands originate from?

Taking a closer look it appears, that brands are especially valued where the product is used on **exposed body parts:**

For hair: Fructis Shampoo, for teeth: Odol-med 3 toothpaste, plus e.g. a deodorant by Rexona, **although, apart from those, there was no other significant brand affinity to be found in that particular recycling bag**.

This could be seen as a suggestion that more trust is placed in the **competence of the brand, and respectively its effect** (giving a sense of self-worthiness and status), when areas perceived to be socially relevant are involved. With foul teeth, greasy hair and strong body odour one after all offends the society…

Body Care


Odol med 3 toothpaste
Timotei Shampoo


Dove Body Lotion
Rexona Deo


Fructis Shampoo

II. Findings Concerning the Brand's Illness Status

3) Affected Organs of the Brand

These areas show significant symptoms of a no-name-infection

Product category	Brand	No-Name
Yoghurt and curd	50%	50%
Cheese	39%	61%
Dairy products (sour cream, cream,…)	45%	55%
Pasta	48%	52%
Coffee	60%	40%
Snacks savoury	54%	46%
Bread	45%	55%
Cleaning products	55%	45%
Hygiene articles	45%	55%
Pet food	42%	58%

Cleaning Products: Effect without side effects please!

During the analysis of the bag contents one could observe, that **cleaning products**, which **users get in touch with**, are more often than not brands. **Washing-up liquid**, for example, is (especially in the middle- and upper class) rather a **brand** – those who still wash their dishes (every now and then) by hand, want only the best for their favourite porcelain…

When it comes to "doing dirty laundry", most consumers are apparently up for the brand – and especially the lowest social class (cleanliness as value orientation).

On the other hand consumers seem to turn to no-name products for **actions that have to be done quickly and for products, which work without the help of the consumer** (striking for dishwasher tabs). The new tabs by the Unilever brand SUN in France, featuring a self-dissolving foil (that means no unwanted skin contact), should in this connection give a crucial motive for choosing the brand.

far

→ No-Name

Closeness to the body / skin

close

→ Brand

Cheese and Coffee: the favourites of connoisseurs

The **significance** of the products coffee and cheese varies strongly depending on each household. It stands out: **the higher the social class**, the more likely it is to choose **high quality products**. The packaging plays a relatively minor role in both segments, because the product is re-packed/ stored after the purchase.

In relation to the easier **adaptation of the layman** a further potential can here be opened up: New forms of presentation and service-oriented packaging are requested.

- For the **layman**: Potential for more elaborate packaging to function as orientation aid and focal point
  - **Functionality**: Re-seal ability, absorption of odours, bite-sized/ labour easing preparation etc.
  - **Orientation**: through a clear address of the target group/ visible explanatory aids

- For the **connoisseur**: Finesse of the recipe
  - Creating new unusual sensuous experiences, new tastes, odours, textures etc.

II. Findings Concerning the Brand's Illness Status

4) Alternative Therapy Methods for severely affected Organs

Severely affected organs of the brand

Product category	Brand	No-Name
Tin-food	28%	72%
Milk	19%	81%
Juices and Nectars	25%	75%

!

The downfall of the brand?

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All „natural“ products, which experience no or little processing and can be consumed in large amounts, belong to this area.

On a **rational level** it is about processing procedures, which **require almost no specific know-how**. From the viewpoint of a consumer the products are „only“ filled up or canned. Therefore it seems to be difficult for the consumer to **perceive qualitative differences between brand and no-name products**. Branded products are not easier to identify. Milk, for example, remains milk, no matter if brand or no-name product.

On the emotional level brands promise **hardly any psychological benefit**. An appeal to higher values, as for example traditions or carefulness during processing, is not emphasized sufficiently.

In order to achieve an up valuation of these products the **differences** between brand and no-name product have to be made **more transparent**, to support a rational justification for buying the brand in the first instance (like the Smart Shopper, who post-legitimises his no-name purchase).

And finally, the product has to assist in a very emotional way to create trust in the brand.

Milk, the problem child

Milk makes up for the **largest singular product category** with an overall share of 7%, and was consumed in all boroughs in similar quantities. Skimmed and fresh milk can be found at equal amounts. There is hardly any variety regarding the (elaborate) tetra-pack. Even the no-name packs are equipped with a practical screw cap (vs. rip- or clip seal), whereby we could observe that the unification increased during the course of the year. For example, Milbona milk has been available with rip- and clip seal and since this year also with the screw cap.

Consumers change in no other segment back and forth as much as in this one. Three different milk cartons (Landliebe, Bio Wertkost and Milfina) in one bag are no rarity. Ca. **70%** of all consumers bought **no-name-milk**. Even in the **upper boroughs this percentage lies at 50%**.

Milk, as such a symbolic product, is surprisingly no longer „sacral". The bags show a **completely banalised product**, with which the consumer is no longer faithful to a brand. The frequent occurrence of the brands Landliebe, Weihenstephan and Bärenmarke in the bags examined by us, suggests that the connection the consumer has to these brands is stronger. Those brands share familiar values and promise a country connection.

Other axes of communication and positioning may however be possible (compare other countries, where milk becomes a speciality product: for under three year olds, for seniors, reduced in lactose, etc.).

The capabilities of milk

The multi-faceted range of no-name products found in the recycling bags over the course of one year was surprisingly large. Thereby the spectrum ranged from classically cheap products up to well established, highly developed no-name products with brand character.

Milk for refinement
(of tea, coffee,…)

For coffee milk the **taste** seems to be **less relevant**, which is why **skimmed milk and no-name** milk are accepted.

Milk as a part of a healthy diet

Milk drink

Milk for cereals

Consumers, who drink milk pure, in their hot chocolate or with cereals, tend to buy whole milk rather than skimmed milk and tend to use **branded products**, because the classical, well praised **health- and taste properties of milk** are brought out more here.

Milk in different forms of usage

Coffee Milk / Cream

Milk Drink

Milk for Cereals

Juices and Nectars

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5% of all collected items belong to the category juices and nectars, and all classes drink the same amounts. 70% of all juices and nectars are no-name products, only 30% are brands. Like in other product categories the brand's market share increases with the social class.

A **detachment of thirst and indulgence** takes place. Depending on what is more important at the time, the choice is made for or against the brand.

Thirst quencher

First quantity, then quality

"As long as it's a lot"

→ Cheap no-name products

Vitamin kick / conscious indulgence

Quality more important than quantity

"As long as it's good"

→ Potential for the brand

Juices and Nectar

first Quantity then Quality
→ Thirst quencher

first Quality then Quantity
→ Vitamin kick / conscious indulgence

low **potential for the brand** high

III. Therapy Chances for the Brand

Five good reasons for buying brands

The **following 5 motives** are (still) working in favour of the brand:

- **Reward with „sinful" products**
  (for example: Desserts, chocolate, coffee)
  → **Motto: I have deserved that!**
- **Laziness/ easing of work/ calming a guilty conscience**
  (especially in the middle- and lower class)
  (for example: ready meals, canned soups)
  → **Motto: If it has to be ready meals, then at least a brand!**
  If a brand then at least ready!
- **Health/Prevention** (often in the middle class)
  (for example: yoghurt drinks, juices,…)
  → **Motto: My health is dear and precious to me!**
- **Security/Control of quality of ingredients** (most often in the upper class)
  (for example: milk, bread, cereals)
  → **Motto: I do not spare on the most important parts of my diet!**
- **Social Acceptance** (often in the lower class)
  (for example: deodorant, cream, cigarettes)
  → **Motto: That is a necessity!**

Reward


Müller Fruit
Buttermilk
Mövenpick Coffee
Marlboro
Cigarettes
Storck
Toffifee
Milka Mjoy
I have deserved that!
Ferrero Hanuta
Ritter Sport
Jacobs Coffee
Pringles Crisps
Emmi Coffee
Celebrations
Kinder Chocolate

Laziness

If it has to be ready meals, then at least a brand!

If a brand,
then at least ready!

Health

My health is dear
and precious to me!

Security

I do not spare on the most important parts of my diet!

Social Acceptance

Quo vadis, Brand? (1)

At the beginning the question was:

Is an erosion of the brand taking place?

- Yes, after 25 years no-name in Germany the brand landscape is like a heavily cutdown rainforest. This is not only down to the post-modern thinking scheme (abolition of authorities, responsible consumer), but also the fault of the producers themselves, who compromised with the no-name products.

Why has the Richter Scale shifted towards no-name? Why do no-name products reach such heights?

- **The radical formation of no-name as "counter-trend"** (form- and language reduction, limitation of selection) was a welcome saving option for those less well off and later on an ethic-chic „less-is-more" trend of the highly educated.

Do the tectonic plates no-name and brand collide or do they melt into each other?

- **They rather melt into each other, because the no-name trend seems to have met its boundaries:**

  More and more differentiation, more finesse, fuller shelfs, changing offers indirectly announce a victory of the brand today, because in the end, it is the brand's principles, which the no-name products followed (however, without letting the brand have any of the profits!). Has the no-name idea hence „grilled" itself? Has it become unfaithful to its abstinence-ethos?

  Anyhow: The brand is back again, it does however **have to work harder** than in the past.

Quo vadis, Brand? (2)

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Which territories do no-name products occupy?

- No-name products have established themselves especially in areas where the brand showed weaknesses. When it "only" is about basic products, about ordinary milk and other bread-and-butter distributors, that ensures the basic supply in the factories. What a shame. It was a mistake, to leave the monopoly in seemingly simple areas to the no-name products. Because the *Basics* do not have to be simple.

Are there areas in which the Brand remains invincible? Under which climatic conditions can we still find it?

- Our team of social-scientific "geologists and meteorologists" (we mean psychologists and trend researchers) has found some absolutely healthy brand oases and observed successful survival strategies:
- Enhancement of the Self in front of the collective, appeal to higher values (societal, ethical, religious,...), sense- and identity creating functions, stimulation... All the old marketing tricks, which have not lost their validity!

Propositions of therapy

Indeed it will be difficult to develop branded products that can **please the majority**. Whether premium or cheap, both are no challenges anymore – but **to hit the middle requires a brave rethinking and high competence**. There is no time to loose: there, in the middle, plays the music of the future of the brand!

Thus, let's head for **democratic innovations:**

- **Alleviation of knowledge processing/ access to knowledge:**
  simplified language on packaging (a meaningful, problem solving oriented product name); overloaded pictures and pictograms for insiders on the test bed!
- **Resuscitation and education of the senses:**
  re-discover taste (do not mix too much, proceed rather didactical), design textures, so they allow a different access to the product (enjoy the process of applying make-up/ in the food section re-discover the function of the teeth as counter point to the progressing regression), unexpected optical or acoustic signs/ hints for complicated products (transparency for pharmaceutical capsules, loud click-signal when using the cosmetic pencil wrongly) etc.

The GP could prescribe:

"Dearest Brand, you suffer from a burnout-syndrome and have to cure yourself.
I recommend: 1) De-escalation instead of ever faster, higher, further, whiter…
2) Tendency towards a healthy balance: Trust yourself more, get to know yourself, and build on your strengths".

Appendix

Geographic data collection

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Jungbusch/Neckarstadt-West

- Cultural diversity
- High percentage of foreigners
- In need of rehabilitation
- Docking area
- Low rents

Almenhof

- Bourgeois borough
- Many families
- Solid middle class
- Little houses with front yard
- Reasonable rents

Oststadt

- Mansion district
- Educated Bourgeoisie
- High rents

Anecdote

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The recycling bag as surprise bag

We looked forward to the "recycling bag sessions" with mixed feelings during the course of the time:

On the one hand we were of course highly interested which findings of consumer products we would discover each time. On the other hand we have developed some respect after some time for the strange surprises and odours the recycling bags had ready for us.

To report about this in all the details would not be appropriate and would surely lead to similarly numbing feelings for the reader… This, we do not want, but we nevertheless have to tell an anecdote:

Joint'venture

It was an early morning, and we started out, kitted with rubber gloves, to investigate the first recycling bag. Unsuspecting, we unpacked the bag and dispersed the rubbish on the blue ground sheet, which we spread in the courtyard every time, not to leave behind any unpleasant bits and pieces for our neighbours. At first, everything went as planned. We sorted the sweets, bread packaging, juice cartons and were happy that the smell remained within acceptable levels, until we found "it" together with diverse cigarette packs, beer cans, crisp-packs and half empty cartons of milk: In front of our eyes were two Joints, possibly useful for the widening of senses and generation of ideas.

After brief consideration we decided against further application and continued with our work without further interruptions.

By the way: It was a no-name product again!

The "Gelber Sack"

What is the „Gelber Sack"?

The „Gelber Sack"is a special rubbish sorting procedure in Germany, which is named after a special rubbish bag – a yellow sack. The yellow, big rubbish bag is being collected every 14 days. It contains therefore products (or rather their remains and packaging), which were actually consumed on a daily basis during the course of two weeks. The yellow bags can be picked up for free in super markets or other nominated places like the Recyclinghof or Bürgeramt.

In the yellow bag belongs packaging material with the „grüne Punkt" (green dot) only.

Following materials are included:

→ **Plastics**

Cups from milk products, plastic bottles, e.g. from cleaning-, washing machine-, and body care products, foils, plastic bags, as well as Styrofoam, e.g. from fruit or vegetable containers

→ **Metal**

Aluminium and tin foil from drinks or preserving cans, crown caps and screw caps

→ **Compounds**

z. B: Drinks-cartons (milk, juice, etc.)
and vacuum packaging (coffee etc.)

The research team

Lend a hand…

Everybody had to – here are only three brave helpers, but in total Anda, Leslie, Christian, Marina, Barbara, Alwine, Hilke, Christine, Christiane and Gisela have helped.

Overwhelmed with this rubbish…

once again our critical mind was Julia Ohde, qualitative research for marketing, Hamburg. My sincere gratitude.

Natacha Dagneaud, January 2006.

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