Gap Analysis of 2015 Packaging Vendors Online Footprints versus Packaging Buyers Online Buying Behaviour

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PACKAGING DIGEST

I. Preface

My thanks go out to the continued support from Lisa Price and the UBM LCC publishers of Packaging Digest who support this research in a multitude of ways. In addition I'd like to thank continued support of my department chair Anthony Murphy at Fontys University who continues to support this research with his enthusiasm and resources. Finally, the results here were not possible without the hundreds of hours of work put in by my student research team of Kelly Velasquez, Kevin Wensink, Javier Castillo Parejo, Maria Barrilao Alonso, Bart Geerts, and Renjie Zhang.

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Executive Summary

This study of 456 packaging solution(s) supplier companies in Western Europe and North America in 2015 focused how they facilitate buyers of their products or services online . The study looked at 3 aspects of online marketing communications: ease of finding and accessing product or service information; social media presence; and ease of digitally sharing online content assets. The countries studied were U.S.A, Canada, U.K., Italy, Germany, and the Netherlands. The study included companies focusing on packaging equipment, materials, services, or a combination of these. The results of the current study were compared to online packaging buyer behaviours reported earlier by us.

Suppliers were found to be doing a good job in posting product information and making it freely accessible to potential buyers across all countries and types of companies. Over 85% of the companies make it easy to access information, and 13% only with a minor hindrance. Earlier packaging buyers rated this activity with a score of only 6.5 out of a score of 10.0. Based on our findings here, we conclude that there are other factors not related to the quality of supplier websites or access rights which hinder packaging buyers in finding appropriate product or service information online.

A small majority of suppliers (52%) maintain 2 or more active social media channels for communications with buyers. Interestingly, the 52% comes close to matching the utility numbers reported by online packaging buyers earlier. In our earlier study, 49.5% of the buyers reported that they benefited from social media during a recent packaging solutions buy.   We found that suppliers in Germany, Italy, and the Netherlands, trail counter-parts in other countries in the use of social media channels with 42%, 51%, and 30% of such companies not using social media for product/service dissemination respectively.   When comparing the use of social media channels against the type of solutions offered by each supplier (equipment, materials, services, or a combination) we found no significant differences.

Lastly, at this time, few suppliers (12%) are doing a good job of making it easy to share product or service information directly online. We searched for email share buttons, and similar social sharing buttons on product information pages and found few. In fact in countries like Germany and the Netherlands we didn’t find any product information webpages with this capability. These results mirror earlier findings concerning buyer behaviour where (a smaller sample group) said that only 3% of the buyers shared product or service information with colleagues via email or social media.

The study suggests several questions for perusal in a follow-up project targeting online buyers.

1. Introduction

Earlier in 2015 we completed an initial international study about the online buying behavior of people seeking packaging solutions (Szanto 2015). The study reported several interesting online behavioral characteristics related to the effort it takes to find online information and social buyer interactions online. To further explore these initial findings, we decided to carry out a follow-up study examining the online presence of 456 packaging solutions vendors in Europe and North America. The goal of this exploratory research was to find out if there was a "gap" between the data and behavior reported by buyers versus the online offerings of packaging solutions vendors.

The motivation for this study stems from the desire to further substantiate, repudiate, or clarify earlier findings from the online buying behavior study. Thus this study focused on the supplier/vendor sides of the packaging industry in 6 countries: USA, Canada, United Kingdom, Netherlands, Germany, and Italy. Together these countries represent about 20% of the world's packaging solutions vendors. We report on 3 different areas of concern stemming from the earlier buying behavior study:

1. Ease of finding various types of online information to facilitate a purchase decision
2. The utility of social media to support a buying decision
3. Why packaging buyers don't share more information by email or other digital means with other members of their buying team.

We first present the research methods used to gather our new data, including how companies were chosen for this study. Next, the results of our measurements of the online presence and proliferation of the 456 companies is presented. We then highlight any gaps we found between the buyer's behavior reporting from earlier and our current measurement results. Finally we discuss the management implications of our findings for packaging solution suppliers or vendors.

2. Research Methods

2.1 Data Collection

The study was conducted between April to June 2015 by a European based research team, fluent in several languages, although we only focused on English language online representations of the companies researched. Thus if a company did not have any English language online assets, they were not included in our study. All data presented herein was collected indirectly, namely using the internet to explore various digital assets of the companies researched, such as: corporate websites, Linkedin pages, social media pages.

2.2 How Companies Were Selected

Companies for this survey were selected from several publically available lists of packaging solutions providers. We used lists of companies from the following sources:

- National packaging association membership lists
- Interpack 2014 electronic catalogue of packaging exhibitors
- National Chambers of Commerce

For a full list of companies, please see Appendix 1. There was no effort to make the lists exhaustive.

2.3 Segmentation of Selected Companies:

We decided to limit the number of companies per country to keep the study manageable in the time frame mentioned above. We focused on companies in the following countries: USA, Canada, United Kingdom, Germany, Netherlands, and Italy. The number of companies per country and their relative employee sizes are shown in Table 1.

	Canada	USA	UK	Germany	Netherlands	Italy	All Countries
# of companies (N)	93	109	64	64	63	63	456
small (< 100 employees)	41	17	31	51	53	39	232
medium (101-499 employees)	43	54	25	10	9	21	162
large (>=500 employees)	9	38	8	3	1	3	62
					Total # companies:	456	

Table 1 Number of companies in survey and their sizes across 6 countries

Further we also characterized the companies by the type of packaging products or services they provide. Companies were grouped into 4 different Product/Service categories:

- Services- such as consultancy, design, engineering, co-packers etc.…
- Packaging machinery or hardware
- Packaging Materials- such as containers, labelling, caps, bottles, etc.…
- A combination of 2 or more of the product/service categories above

The results of this segmentation is shown in Table 2.

Name of Business Area	Country						All Countries
	Canada	USA	UK	Germany	Netherlands	Italy	
Services	10	5	12	11	14	0	52
Equipment or Machines	19	69	30	30	25	31	204
Packaging Materials	45	20	20	16	24	7	132
Two or More Business Areas	19	15	2	7	0	25	68

Table 2 Segmentation of companies in the survey based on main business activities

2.4 How Online Assets Were Rated

We now describe how the companies various online assets were investigated to provide exploratory insights about the 3 focus areas of this study described in the Introduction.

2.4.1 Focus 1 - Ease of Finding Information

In our earlier research (Szanto, 2015) packaging buyers reported that it was relatively difficult to find information online to assist their purchase decisions. On a scale of 1-10, they rated this process a score of 6.5 (see Appendix 2). Thus we investigated the workings of supplier's websites. Namely we rated the ease of finding and getting access to product information or service information on their primary website. We used a 5 point rating system, **starting** with a positive score of 5 points. For each of the following handicaps or deficiencies we deducted points as follows:

- **Number of clicks**: if more than 3 mouse clicks are needed to get to the information then 1 point is deducted
- **Email**: if you must enter an email address before being able to view information, deduction of 1 point
- **Creating account**: if user is asked to create an account before accessing the information, deduction of 1 point
- **Personal Information**: if user must enter personal information such as address, job function, etc… deduction of 1 point
- **Not accessible**: if user is not able to access the information unless direct contact is made with the company offline; deduction of 5 points

2.4.2 Focus 2 - Use of Social Media Channels By Vendors/Suppliers

From our earlier study, 50% of the buyers reported that they did not garner any utility from social media during a recent purchasing process which also used online resources during the decision process. These earlier results are shown in Appendix 3. Thus we decided to check how many of the 456 companies in our study had active social media presence.

The presence and utility of the vendors or suppliers was measured using a 3 step process. First did the company have any social media channels? Second, was Linkedin the only social media channel. Third, if the company had 2 or more social media channels (including possibly Linkedin), then we scored the utility of these channels using a 5 point scale again. Companies started with a score of 5 points, and points were deducted as follows:

- **Public discussion:** if there are no public discussions on company's posts, deduction of 1 point
- **Amount of postings:** If the amount of postings is less than 3 per every two months, deduction of 1 point
- **Text driven:** If the posts are only text driven (no pictures or videos), deduction of 1 point

- **Time frame:** If the last post of the company has been longer than 3 months, deduction of 1 point

2.4.3 Focus 3 – Why Vendor/Supplier Online Information is Not Shared Readily By Digital Means

From our earlier study less than one half of the respondents shared supplier information with other member(s) of the buying team electronically (see Appendix . In that survey, 61% of the people reported that they worked for small companies with less than 100 employees. So, perhaps at smaller companies people work closer together and there is less need to share information digitally versus using verbal means. But even at large companies, with more than 1000 employees, only half of the respondents reported that they shared supplier information digitally. So we wanted to know why this behaviour was exhibited. One reason for such behaviour could be the ease of sharing online published supplier information. Thus we decided to measure whether websites allows users to share product information with a one-click option.

We measured three characteristics per company's product information pages. First were there any buttons on the page(s) to share information? Second, if yes, then could the information be shared via an email option. Third, if there were share buttons, were there any allowing the user to post to Linkedin, Twitter, or Facebook.

3. Results of Data Collection

3.1 Ease of Finding Information

Figures 1 and 2 document how easy vendors or suppliers make it to find and get product information off of their corporate websites. From figures 1 and 2 we see that in all countries it is easy to find and access product or services information on vendor sites. Over 95% of the companies surveyed provide easy access to information or with only a minor hindrance.

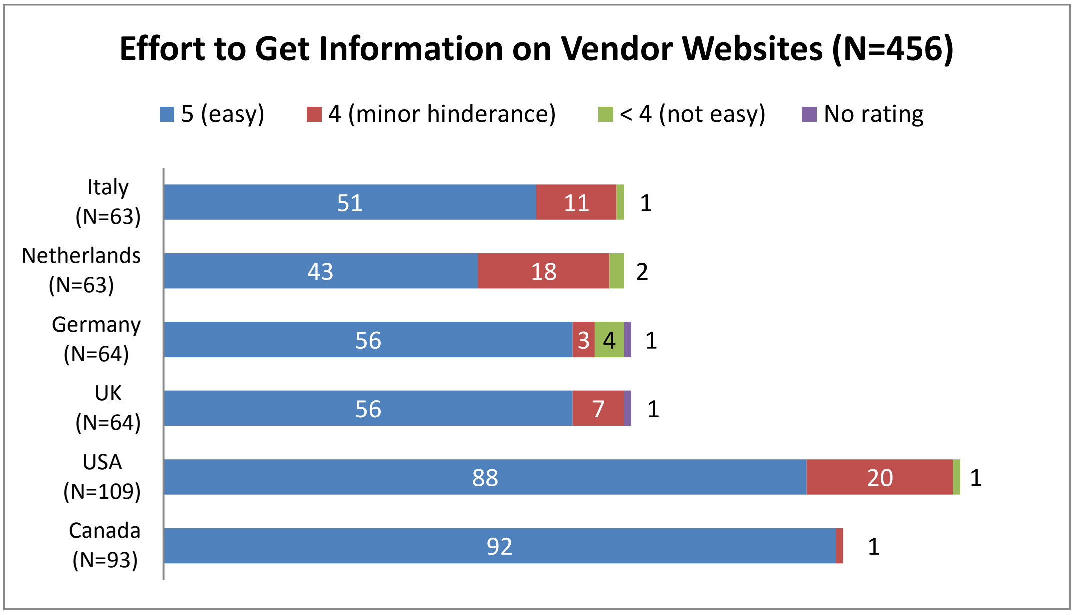

Figure 1 Rating the effort needed to find product information on corporate websites across countries.

In our earlier study ease of finding product information was rated with a score of 6.5 on a 10 point scale, with a significant deviation. From this study, it appears that the difficulties reported earlier do not stem from the webpages hosted by vendors as over 95% of the vendors perform well on this metric. Thus there are other reasons hindering buyers ability to find the necessary product information that they seek. We intend to explore this more deeply in our next packaging buyers online buying behaviour survey in 2016.

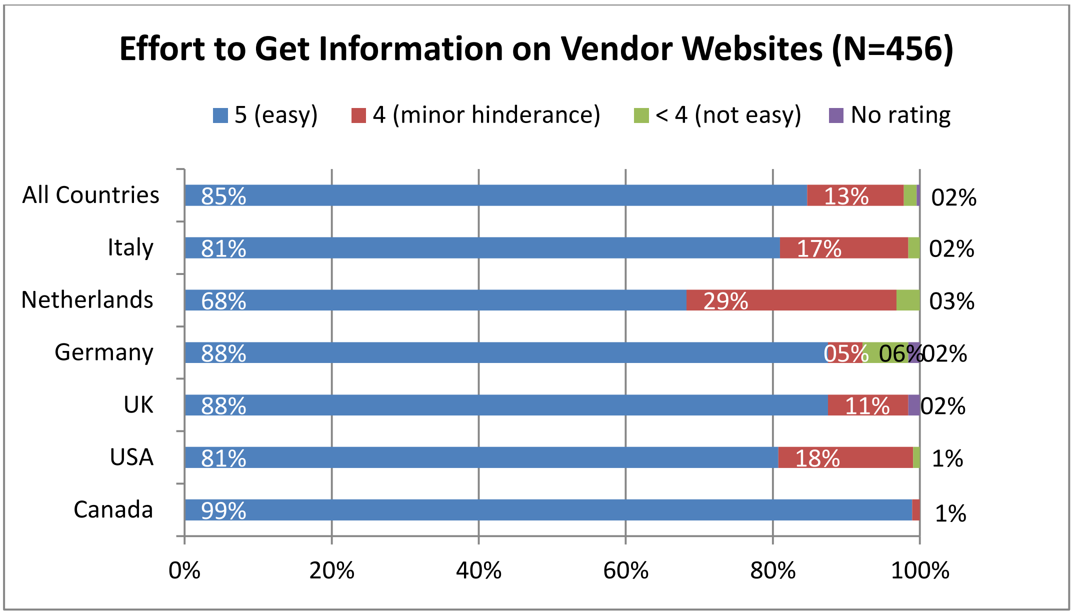

Figure 2 A high percentage of companies in the survey make it easy for buyers to find product information on their websites.

3.2 Use of Social Media Channels by Vendors/Suppliers

Since we found that few packaging buyers used social media channels to assist their online quest to facilitate a recent purchase, we examined the use of social media channels by vendors. Are vendors using social media to help support their marketing and sales efforts in the various countries and across various types of packaging solutions providers. Figures 3 and 4 show the results of our counts.

Overall across all countries we see about a quarter of the companies do not use social media at all. One quarter of the companies use only Linkedin. One half use multiple social channels. There are significant differences between North America and the European countries. For example Figure 4 shows that 51%, 42% and 30% of the companies in Italy, Germany, and Netherlands respectively, do not use social media. Compare this to the USA and Canada, where the numbers are 9% and 14% respectively. One explanation for the lower numbers in Europe could be that about half of the companies from Europe in the survey were smaller (< 100 employees) and thus have less resources and capacities to support social media marketing channel(s). We did not ask this question specifically, which perhaps merits follow up in the future.

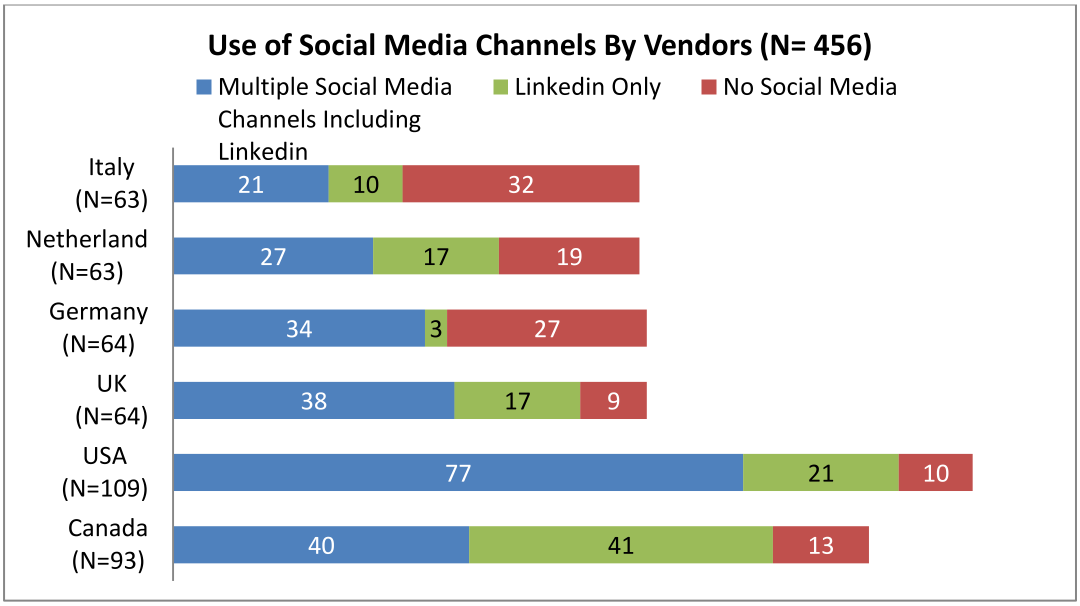

Figure 3 How many companies use social media in different countries

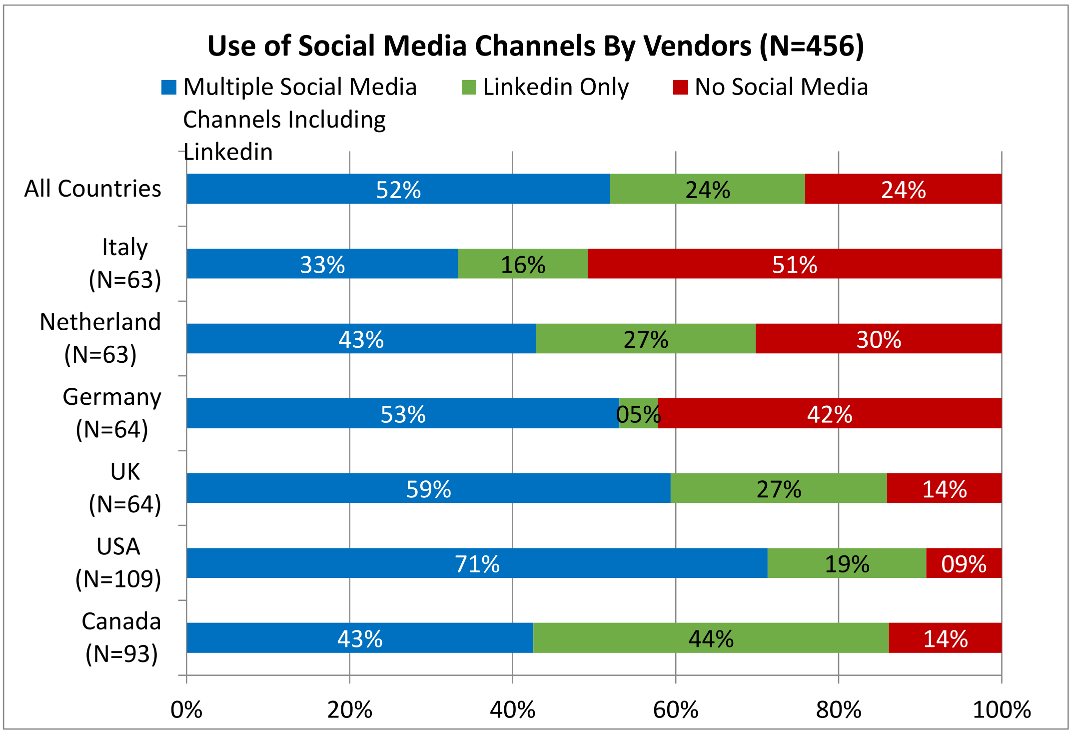

Figure 4 Breakout of social media usage percentages across various countries

We also looked at the social media breakout by the main types of business activity (or the nature of the company's business) that the company was engaged in (services, machinery, supplies, or a combination). These results are show in Figures 5 and 6. The sample size was slightly smaller here than above in Figures 3 and 4 because we were not able to confidently figure out the main business areas of 13 companies, thus only 443 companies are reported on. We see that a relatively higher percentage of companies selling materials/suppliers use social media (84%) than for example equipment manufacturers and service providers (73%). Also noteworthy, is the use of Linkedin by the material/supply companies, which is about twice as high as the two other groups.

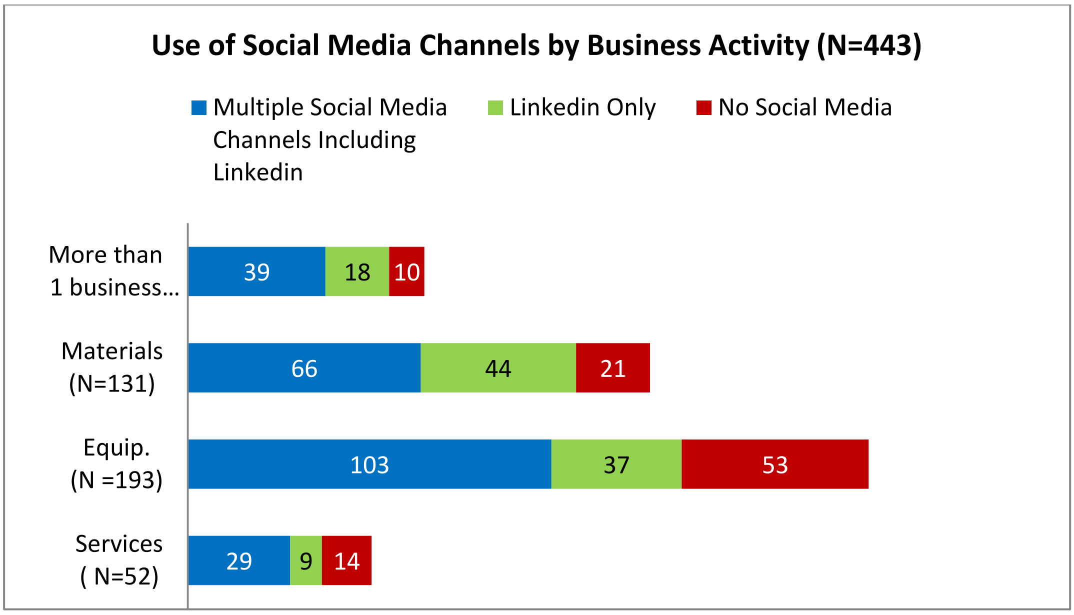

Figure 5 Use of social media channels mapped against nature of business activity

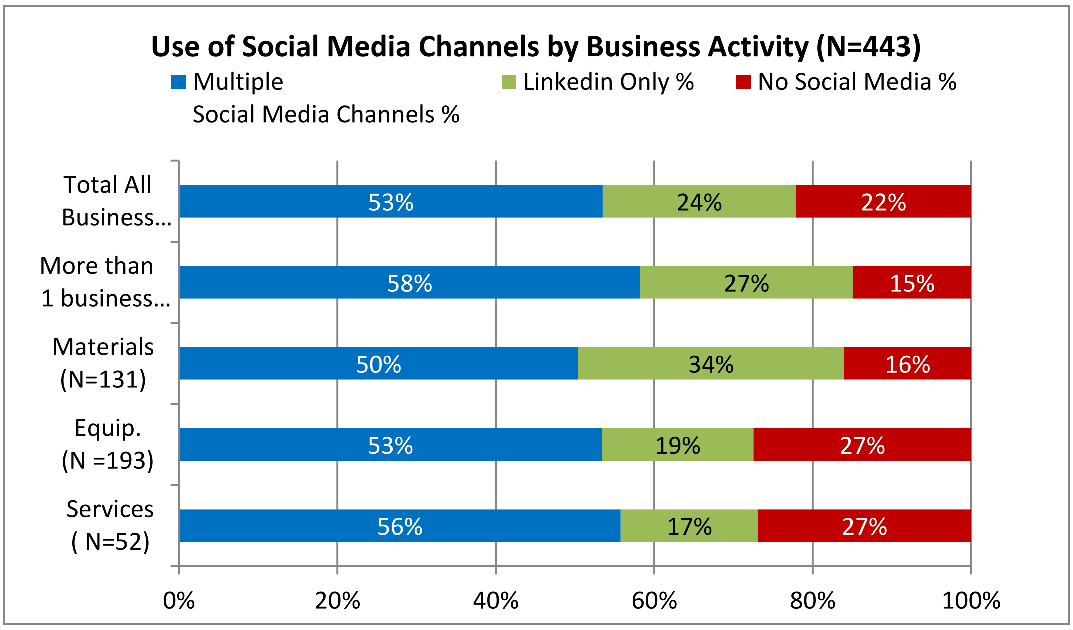

Figure 6 Use of social media channel percentages mapped against nature of business activity

3.3 Share ability of online product information

As we saw earlier in our buyer behaviour study that few people shared the information they collected online using social media, or email, we decided to see what kind of quick share options vendors offered potential buyers. The results of this analysis are shown in Figures 7 and 8. We see that in 2015, few packaging solutions providers afford the option to share product information directly from their webpages. Figure 7 shows that for 4 countries the values range between 10 – 20% of the vendors offering these options, while in Germany and Netherlands no vendors offer such information sharing capability.

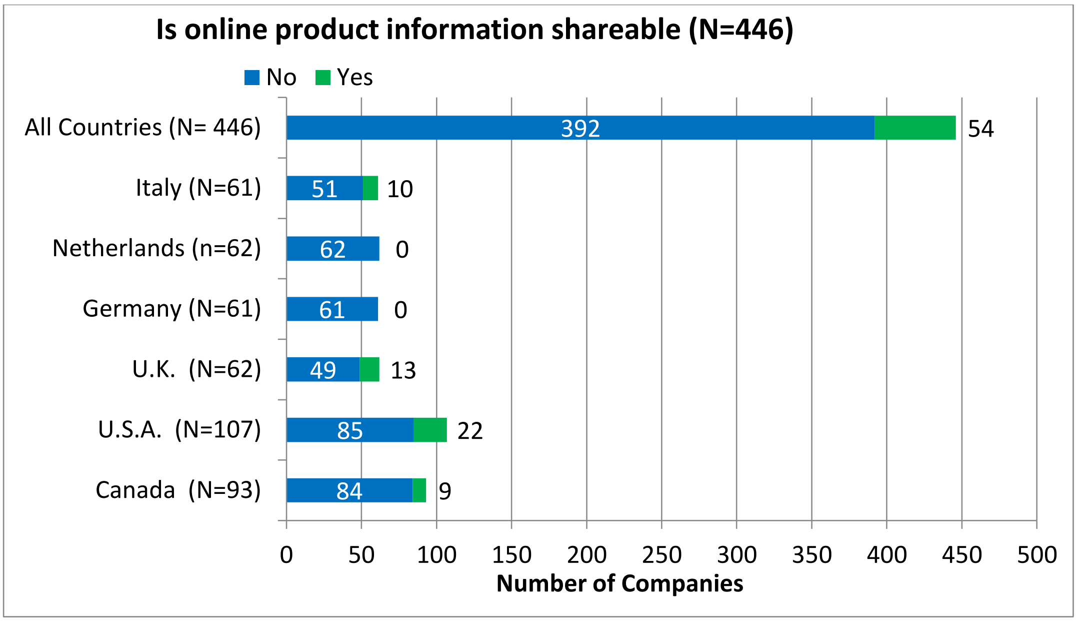

Figure 7 How shareable is information posted online by vendors across different countries.

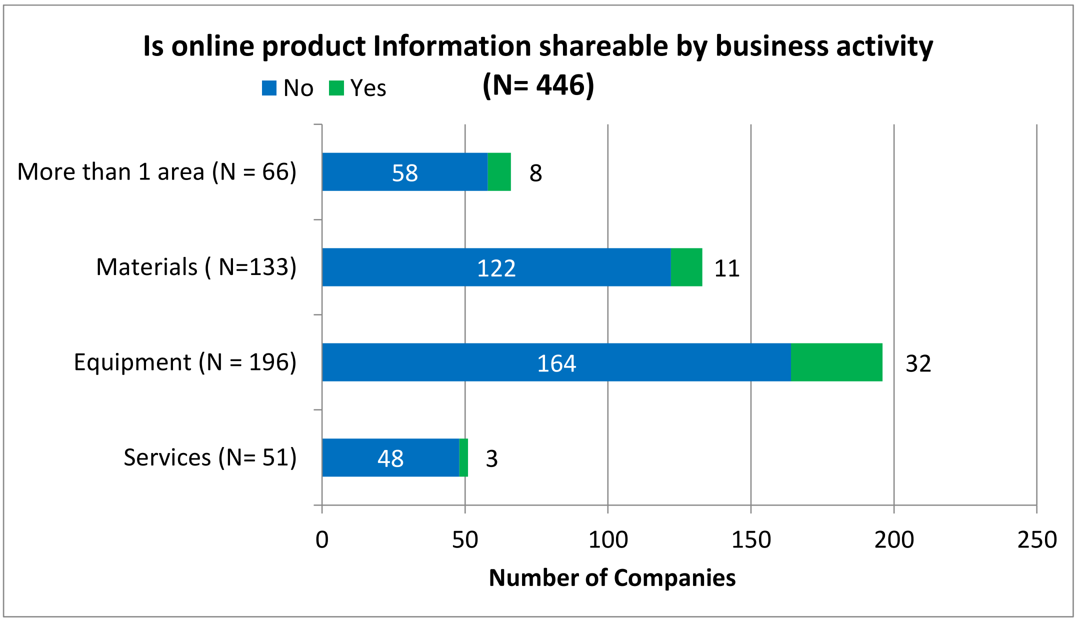

Figure 8 How shareable is information posted online by main business activities of vendors

4. Gap Analysis

In this section we compare our findings about the performance of packaging solutions providers online compared to the online behaviour and experiences of packaging buyers reported by us earlier in 2015. The comparisons are made using percentages, as in this research we looked at over 400 companies while the buyers data was limited to 120 respondents or less in some cases.

4.1 Gap 1 Ease of Finding Product Information (Buyer/Supplier)

In Figure 9 we see that a vast majority of the packaging solutions providers in the study make it easy for customers to find and access product information via their websites. To compare the ratings of suppliers/vendors, which used a 5 point scale in this study and those of the buyers in our earlier study, which used a 10 points scale, we doubled the scores for the suppliers/vendors for comparison purposes. Over 98% of the suppliers/vendors are doing a good job at providing easy accessible product data online. However, buyers report that only 40% of them feel the same way. Is this really a gap?

Buyers naturally face the challenge of finding *appropriate* vendors/suppliers online amongst the ever increasing online data and channels trying to serve them. From our data we suggest that the gap shown in Figure 9 is not related to product posting practices and policies of the vendors/suppliers. Rather the problem may emanate from the overwhelming amount of information posted online. Another problem could be a disconnect between the quality and breadth of product information posted online by vendors/suppliers compared to the expectations of buyers. The packaging industries also face online promotional challenges found in all B2B industries. Another possible difficulty may be related to online promotion of packaging solutions to buyers so that they can find appropriate vendors/suppliers when they embark on a purchasing cycle. All three of these problems are worth exploring in future packaging buyers behavioural studies.

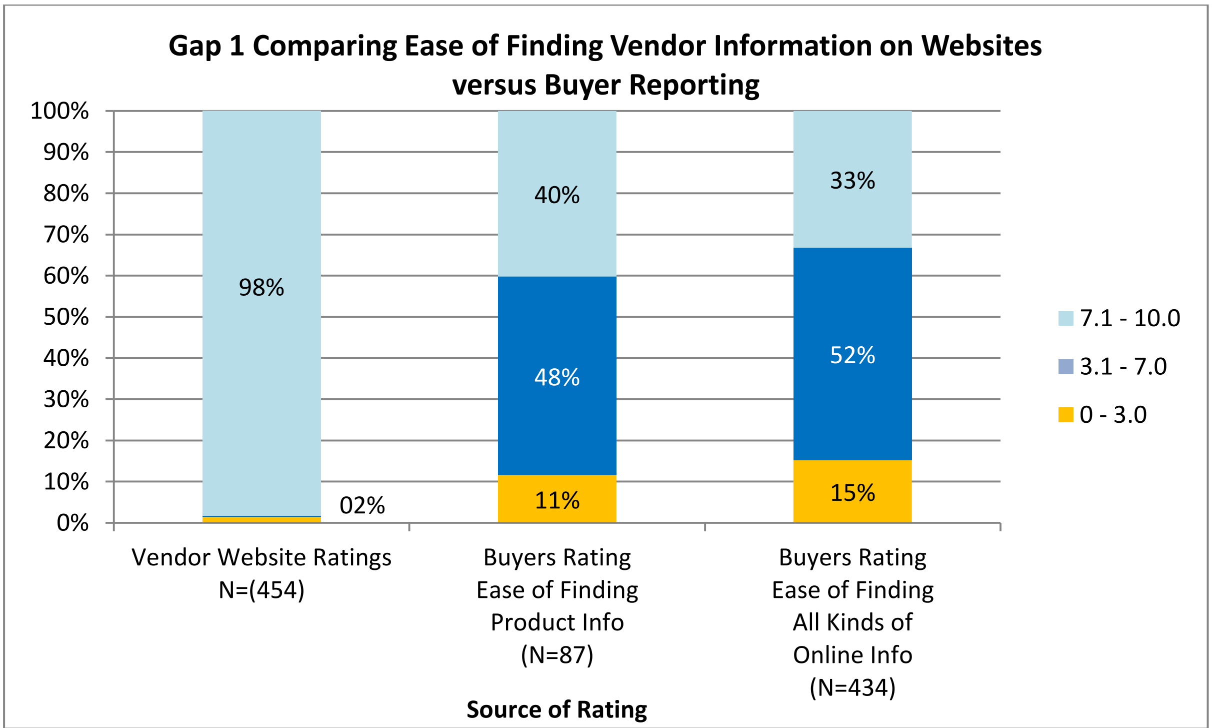

Figure 9: Gap 1- Product Information Analysis (buyer/supplier)

4.2 Gap 2 Benefits of Social Media Channels For Vendors Versus Buyers

We now compare the use of social media by online packaging buyers versus the availability of social media channels provided by suppliers or vendors. Figure 10 show the results of the surveys for these 2 groups. One half of the buyers said they didn't benefit from social media during their buying journey. At the same time we see that 24% of the supplier or vendors do not use or offer social media channels for their customers, and another 24% only use Linkedin. Thus it is not surprising that buyers remain sceptical about the utility of social media usage to support their packaging solutions buys. Our interpretation of Figure 10 is that there today there is NO gap between buyer's online behaviour and expectations of social media and the servicing of these channels by the entire packaging industries in the 6 countries we studied.

Two relationships which can not be determined from this simple data are:

- For the buyers who benefit from social media, are they actually using supplier/vendor social media channels, or are they using their own social channels, or both during their buying journey
- For buyers who say they did not benefit from social media, was it because they pursued vendors who don't use social media or limit it perhaps to Linkedin only.

Both of these types of relationships need further study in future work.

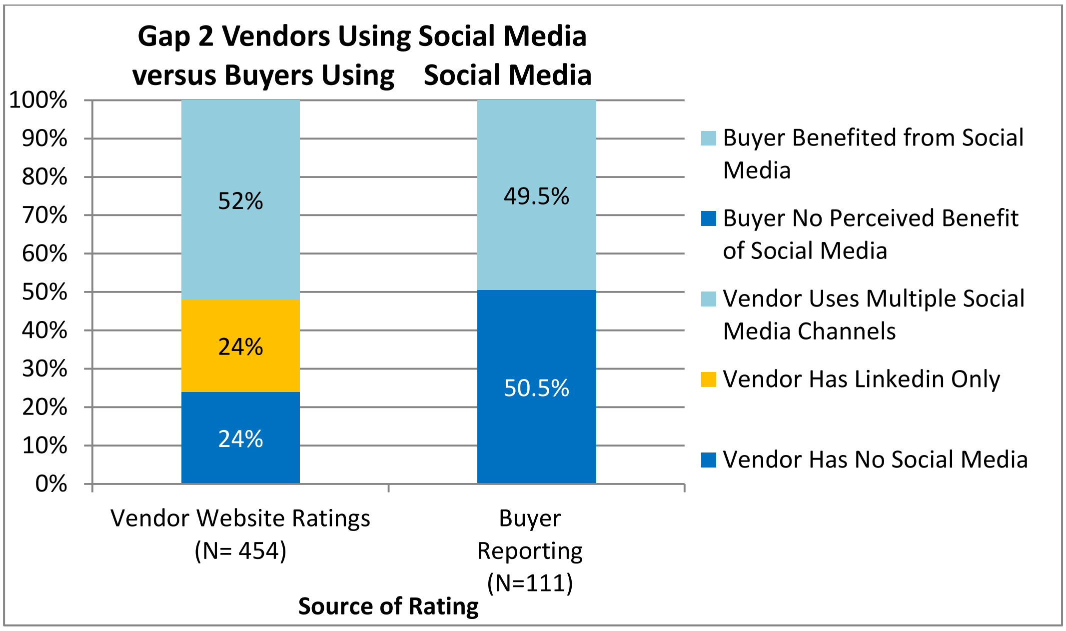

Figure 10: Gap 2- Benefits of Social Media Channels (buyer/supplier)

4.3 Gap 3: Shareable Options

The Millennial generation (those born between about 1977 – 1994) represent about 24 – 27% of the population in Europe and North America, for the rest of the world the percentages are high, up to 30%. Such buyers tend to be internet savvy, and many under 30 years of age also active on social media networks. This group represents a growing number of influential employees at both buyer and supplier organizations. In our studies we found few people in the packaging industries using social means to share information or companies providing this capability.

In Figure 11 the comparison of the use of social media to share information by buyers and vendors shows little difference between the capability provided by vendors (12%) and utility of this capability by buyers (3%). While it was true that a significant portion of our buyers came from smaller organizations we expected to see more vendors to have at least an *email this information* button or logo on their product web pages. However as the data shows, only 12% offered this kind of option or other social sharing means. So our conclusion is that the data in Figure 11 shows no significant gap between the desire of buyers to quickly, conveniently, or instantly share vendor product information online versus this capability offered by vendors.

However, clearly vendors can quite easily service or facilitate should sharing by adding easy sharing options to their product related webpages. We would expect that as more Millennials gain purchasing journey influence, especially at larger multi-location companies, the inability to share product information instantly would put vendors at a disadvantage compared to competitors.

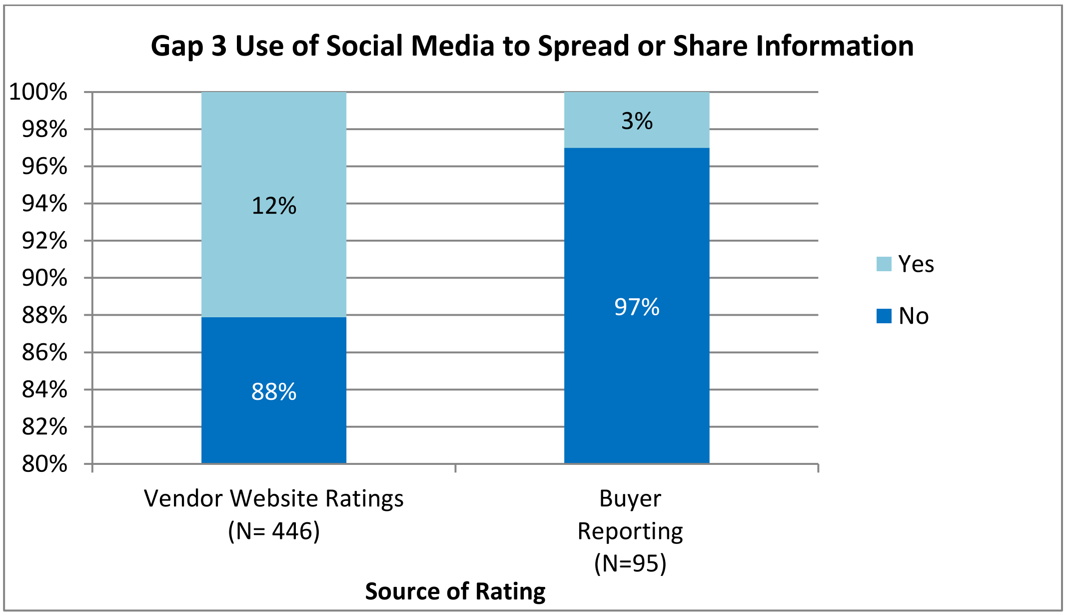

Figure 11 Comparing the use of social media to share information by packaging vendors and buyers

5. Management Implications

Our study shows that regardless of the nature, size, or location of packaging solutions providers, the industry is doing a good job of posting product related information for buyers. For those companies which make it difficult to access such information, you are a very small minority. If you gate access to such information, or try somehow to interfere with easy 7/24 access to such resources for buyer then clearly you are out of step with the rest of the industry and are damaging your sales potential.

The number of companies that are not using social media channels, or only Linkedin varies quite a lot between 29% - 67% depending upon country. This variance has implications for companies striving to do business inter-continently. For example Italian companies lag American competitors in this aspect, which may be due to cultural preferences . Never the less, many Millennial buyers will expect to at least see some “useful” social media activities across 1 or more channels when they vet potential vendors to engage with. This means that even small suppliers should allocated some commercial resources to keeping at least 1 – 2 social media channels filled with relevant and timely product or service related posts. The worst companies set up these channels, and then either abandon them, post only irrelevant “fun” content, or post too infrequently giving the impression that the channel is an after-thought or a hobby of someone at the company.

An area of improvement, which is relatively easy to amend, concerns the share-ability of digital product or service information posted on websites.   In leading countries in this aspect, U.S.A., U.K, and Italy, about 20% of the companies enabled easy sharing or product information on their website via 1 or more “share” buttons. While these numbers are low, they can be easily improved to make the online buying process easier and more comfortable for customers.   In general German and Dutch companies are not providing easy share buttons for product or service information. By omitting such functionality on key webpages or not embedding it in electronic documents, companies in Germany and the Netherlands risk a greater chance of losing prospective inquiries when purchasing teams are larger and geographically dispersed.

Bibliography

Szanto, G. (2015). *Online Buying Behavior of Packaging Buyers in 2015.* Eindhoven.

Appendix 1: List of Companies in Survey

ABG Packmat	Germany
Af packaging solutions	Germany
Affeldt	Germany
Ahpast	Germany
ALX	Germany
Audion	Germany
Avi packaging	Germany
Bahmuller	Germany
Bechtold & sohn	Germany
Biester	Germany
Bobst	Germany
Bosch	Germany
Burghardt	Germany
Burgopak	Germany
central strapping	Germany
Contimeta	Germany
CTA	Germany
Decopack	Germany
Emkon	Germany
E-packaging	Germany
Euroline	Germany
Fuji packaging	Germany
Gerog	Germany
HDG	Germany
HT Veprackungen	Germany
KHS	Germany
Koera packmat	Germany
Kopack	Germany
Kuhlmann	Germany
Lacers	Germany
LIC packaging	Germany
Ma industrie	Germany
Mactec	Germany
MENKE	Germany
Meurer gruppe	Germany
MM packaging	Germany
MSK	Germany
Multivac	Germany
Opitz	Germany
OptiFol	Germany
Pactec	Germany
Prock Gnoll	Germany
Quandel	Germany
Quick pack	Germany
Rovema	Germany
Schubert packaging machines	Germany
Schuetz	Germany
Schwall	Germany
Sealed air	Germany
Stambera	Germany
Thuerlings	Germany
Toss	Germany
Transpak	Germany
UES	Germany
Uhlmann	Germany
Ultrapack	Germany
Unifill	Germany
V.i.S	Germany
Variovac	Germany
Vermee	Germany
Verpackungsmacher	Germany
w&w	Germany
Webomatic	Germany
Zpack	Germany

Adlppack	NED
afvalfondsverpakkingen	NED
Ambipack	NED
Audion	NED
Audion Verpakkingsmachines	NED
Bangma verpakking	NED
BASF Nederland B.V.	NED
Beumer Packaging	NED
Blokpak	NED
Borst Packaging Systems	NED
Bouwpaco	NED

Budelpack Poortvliet B.V.	NED
Caparis N.V.	NED
Certis	NED
Contimeta	NED
Contipack	NED
Conveyor stystemen	NED
deWitt BV	NED
DeWitt BV	NED
Fabu	NED
Fluortech	NED
HK-Plastics	NED
Holbox BV	NED
IDéPACK Verpakkingsmachines B.V.	NED
Kivo plastic verpakkingen	NED
Kompak Nederland B.V.	NED
M.B.S. Packaging V.O.F.	NED
Marvu	NED
metalarts	NED
Multifill BV	NED
Nomi Co-Packing	NED
Nypak	NED
OD	NED
Pactiv	NED
Plastic2pack	NED
Racupack	NED
Rajapack	NED
Recypack	NED
Reisopack	NED
Retif verpakkingen	NED
Rivièra Product Decorations B.V.	NED
Robbertpack BV	NED
Ruiten Foodpack	NED
Sait Benelux BV	NED
Skillpack	NED
stepfive	NED
Tallpack	NED
Total Pack B.V.	Ned
Trans Ocean Pacific Forwarding B.V.	NED
Tromp verpakkings partners	NED
Ultrapack	NED
Unimpack	NED
Van Oordt the portion company B.V.	NED
Van Wezel	NED
VD Process Equipment	NED
VerAutomation	NED
vercom	NED
VH Verpakkingsmachines B.V.	NED
Vinklisse	NED
VIV	NED
Waga BV	NED
Zwagertechniek BV	NED

Abrigo	Italy
Aetna Group S.p.A.	Italy
AL.MA S.r.l.	Italy
ALTECH S.r.l.	Italy
AMB Spa	Italy
Amotek	Italy
Antonio Dominici	Italy
Apsol srl.	Italy
Arca Etichette S.p.a.	Italy
Arol SPA	Italy
Atlanta Stretch S.p.A.	Italy
ATS Packaging	Italy
B.D.P. Srl Unipersonale	Italy
Baer Plast	Italy
Bema	Italy
Bergami	Italy
BG Pack	Italy
Bielloni Converting	Italy
Boatopack	Italy
Bonfiglioli Engineering	Italy
Bonicomm Srl	Italy
Bonino Spa	Italy
Bormioli Rocco spa	Italy
B-PACK S.P.A.	Italy
Brevetti Gasperin srl	Italy
C&C Group Srl C-One	Italy
Ca.Ve.Co Srl	Italy
Cama 1 spa	Italy
Carle & Montanari OPM	Italy
CartoMac	Italy

Cartonal	Italy
Cartotecnica Postumia SPA	Italy
Cellografica Gerosa	Italy
CFT S.p.A	Italy
Ciemme srl	Italy
Clevertech	Italy
CMC srl	Italy
CM-Fima srl	Italy
CMR Macchine Reggiatrici srl	Italy
Comas spa	Italy
Comek srl	Italy
Concetti Group	Italy
Contital Packaging Solutions	Italy
CT Pack srl	Italy
Curti Costruzioni Meccaniche spa	Italy
Delfin srl	Italy
Di Mauro Officine Grafiche S.p.A.	Italy
Dimac Aetna Group spa	Italy
DUE F.P. srl	Italy
DZ Trasmissioni	Italy
Easysnap Technology spa	Italy
Ecopack spa	Italy
EFFE 3 TI srl	Italy
Eidos Spa	Italy
Elba Spa	Italy
Elettric 80 spa	Italy
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Eurosicma spa	Italy
K-Tech Italia	Italy
Marchesini Group	Italy

abcokovex	UK
accpackaging LTD	UK
acpackaging	UK
Acre Packaging	UK
Acre Packaging	UK
adpak	UK
All-pac Packaging	UK
BDN Packaging Ltd	UK

Benson Group	UK
Collcap Packaing	UK
contact-packaging PLC	UK
Container Products Ltd	UK
Cornwell Products	UK
Coveris	UK
DC Norris	UK
dcpackagingtapes	UK
Detectamet Ltd	UK
Direct Packaging Ltd	UK
Enterpack Ltd.	UK
eps	UK
Erapa	UK
Euro Packaging	UK
FFP Packaging Solutions	UK
GAINSBOROUGH ENGINEERING COMPANY	UK
GSP (UK) Ltd	UK
ilpra	UK
Jayco	UK
JENTON INTERNATIONAL LTD	UK
JMC Packaging LTD	UK
KernPack	UK
LESTA Packaging PLC	UK
Lex Machinery	UK
Loma Systems	UK
macfarlanepackaging	UK
Matcon Limited	UK
Maurice Fish	UK
MultiPak	UK
Multivac	UK
murray-packaging	UK
NNZ	UK
NNZ	UK
OCME	UK
Orion Packaging	UK
postpack	UK
PPMA	UK
Shand Higson	UK
SIAT.CO.UK Packaging Machines	UK
Sontex (Machinery)	UK

Soudal	UK
speedypack	UK
springtimeind	UK
SPRINGVALE	UK
sterlingpackaging	UK
Sutton's Packaging	UK
The Packaging Company	UK
The Protective Packaging Company	UK
tjgtransportservices-packaging	UK
UK Packaging	UK
UK Plastics Machinery	UK
UK Plastics Machinery	UK
Ulmapackaging	UK
USED Packaging Machinery	UK
wannapack	UK
wannapack	UK

3 PI Distribution Inc.	Canada
A & J Mixing International Inc.	Canada
A.R. Arena Products Inc.	Canada
A2A Systems Inc.	Canada
Absolute Haitian	Canada
AceTronic Industrial Controls Inc.	Canada
ACG Worldwide	Canada
ACPO	Canada
ACS Valves	Canada
Adescor	Canada
AdMapVac	Canada
Advance shipping supplies	Canada
Advanced Blending Solutions LLC	Canada
Advanced manufacturing technology	Canada
Advanced Motion & Controls Ltd.	Canada
AESUS Packaging Systems Inc.	Canada
Ag Growth International	Canada
Alex E. Jones & Associates Ltd	Canada
Alpha Poly Corp.	Canada
Amcor	Canada

AMPAK	Canada
Atlantic	Canada
Avantis	Canada
Ball	Canada
BAM Packaging	Canada
Barl	Canada
BC Stamp works	Canada
Beneco	Canada
Bird packaging	Canada
Boss packaging	Canada
Bullseye packaging	Canada
Bunting Magnetics	Canada
CAM Packaging systems	Canada
Capmatic	Canada
Carrousel	Canada
Cascades	Canada
CCL	Canada
Celplast	Canada
CFC Packaging Inc	Canada
CGP Expal Inc.	Canada
City wide packaging	Canada
Clute Packaging	Canada
Coltpaper	Canada
Crawford	Canada
Crown cork	Canada
Crown packaging	Canada
Crownhill Packaging	Canada
Dorfin	Canada
Flair Packaging	Canada
Flexible packaging corp	Canada
Gerhard schubert	Canada
GF	Canada
Graham packaging	Canada
Grauman packaging	Canada
Great Little Box Company	Canada
Green belting industries	Canada
GREIF	Canada
GS Medical Packaging	Canada
HDA	Canada
Hood Packaging Corporation	Canada
Jones packaging	Canada
Jordan manufacturing	Canada
Layfield flexible packaging	Canada
MMC Packaging	Canada

Montebello	Canada
Nulogy	Canada
Pactiv	Canada
Pactiv	Canada
Palgroup	Canada
Paradise Packaging	Canada
PHARM	Canada
Portola Packaging Canada Ltd.	Canada
PPC	Canada
Prestige Fancy	Canada
Pretium Packaging	Canada
Prolamina	Canada
Prowest shipping	Canada
QPC PACK	Canada
Richards Packaging	Canada
Rock Tenn	Canada
Ropak packaging	Canada
Saf-T-Pak	Canada
Sealed Air Corporation	Canada
Secure PAK Packaging INC.	Canada
Sew Eurodrive Canada	Canada
Sheperd Thermoforming	Canada
Smart shield	Canada
Soopak	Canada
Starquip Integrated Systems	Canada
Static Clean International	Canada
Veritiv	Canada
Vins Plastics	Canada
Winpak	Canada

3M Industrial Adhesives and Tapes Division	USA
A-B-C Packaging Machine Corp	USA
ADCO Manufacturing	USA
All-Fill, Inc	USA
ALLIEDFLEX Technologies, Inc	USA
Allpax	USA
Amcor Rigid Plastics	USA
Automated Packaging Systems, Inc.	USA
Axon Corp.	USA
Berlin Packaging	USA
BluePrint Automation	USA
Bosch	USA

Brenton Engineering	USA
Cablevey Conveyors	USA
Cambridge Engineered Solutions	USA
Columbia Machine, Inc.	USA
Constantia Flexibles GmbH	USA
Cozzoli Machine Co.	USA
CP Flexible Packaging	USA
DCI, Inc.	USA
Delkor Systems, Inc.	USA
Delta ModTech	USA
Domino	USA
Durable Packaging International	USA
Eaglestone Inc.	USA
Eastey	USA
Econocorp, Inc.	USA
Enercon Industries	USA
EPI Labelers	USA
Eriez Magnetics	USA
Exair Corporation	USA
Formost Fuji Corporation	USA
Fort Dearborn Company	USA
Fowler Products Company	USA
Garvey Corporation	USA
Glenroy, Inc.	USA
Glue Dots	USA
Graco Inc.	USA
Graphic Packaging Intl.	USA
Hamrick Mfg. & Service, Inc.	USA
Harpak-ULMA Packaging, LLC.	USA
Hartness International	USA
Heat and Control	USA
ID Technology	USA
Intelligrated	USA
Intertape Polymer Group	USA
James Alexander Corp.	USA
JLS Automation	USA
KLEENLine	USA
Kliklok-Woodman	USA
Klöckner Pentaplast	USA
Krones AG	USA
Langen Group	USA
Matrix Packaging	USA
Matthews Marking Systems	USA
Matthews Marking Systems	USA

MG America	USA
Mitsubishi	USA
Mocon	USA
Mold-Rite Plastics	USA
Motoman Robotics	USA
Motoman Robotics	USA
Multisorb Technologies	USA
Nalbach Engineering Co.	USA
National Bulk Equipment, Inc.	USA
Nimco Corporation	USA
NJM Packaging	USA
Nordson Adhesive Dispensing Systems	USA
Nordson Corporation	USA
Orion Packaging Systems	USA
Osgood Industries Inc.	USA
Ossid LLC	USA
Packaging Progressions, Inc	USA
Packaging Services Industries	USA
Packaging Technologies & Inspection	USA
Parker Hannifin Corporation	USA
PFlow Industries	USA
PHD, Inc.	USA
Phoenix Closures	USA
Placon	USA
Plexpack	USA
PMI Cartoning	USA
Polypack, Inc.	USA
Pregis Corporation	USA
Printpack Inc.	USA
Roberts PolyPro	USA
Rohrer Corporation	USA
Ryson International, Inc.	USA
SATO America	USA
Schneider Packaging Equipment Co., Inc.	USA
serac Inc.	USA
Shurtape Technologies	USA
Shuttleworth LLC	USA
Siemens Industry Inc.	USA
Standard-Knapp	USA
Tekkra Systems	USA
The Aagard Group LLC	USA
Transparent Container Corporation	USA

Triangle Package Machinery Co.	USA
U.S. Tsubaki Power Transmission, LLC	USA
Universal Labeling Systems, Inc.	USA
Valco Melton	USA
Veritiv	USA
Verst Group Logistics	USA
Videojet Technologies Inc.	USA
Weber Packaging Solutions	USA
Wexxar Packaging	USA
Yamato Corporation	USA
YUPO Corp.	USA

Appendix 2 Buyer Effort Information Sources

Effort of finding information: How easy is to find the product/service information? (Scoring). This gap was based on Figure 12 below which states the effort rate (as stated by buyers) on finding information from the suppliers' websites. The main box plot which was used to compare is the 'Product Information of a Packaging Solution/Product Service' with a 6.5 mean.

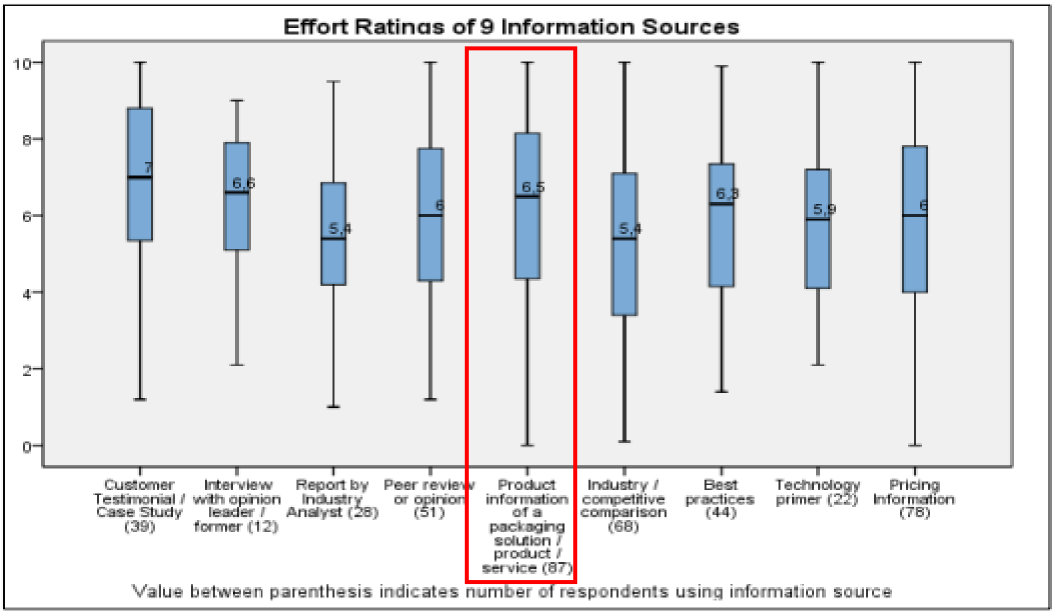

Figure 12 Effort needed to find various types of online information used during a purchasing process.

Appendix 3 Buyer Benefits of Social Media

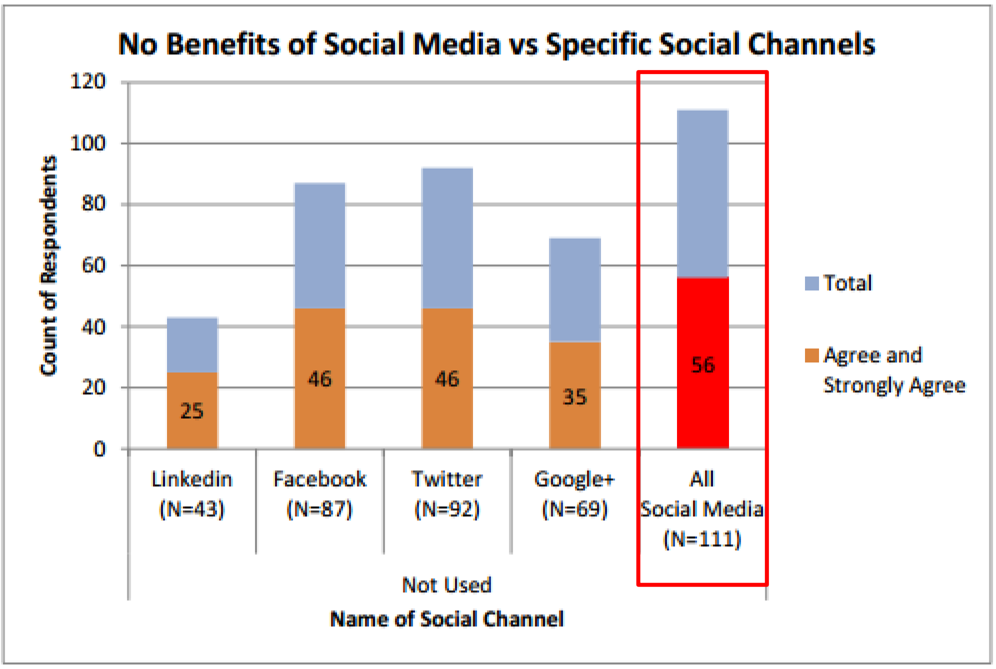

Figure 13 Purchasing buyers reporting no benefits of social media channels during their online purchasing process. Brown bars represent counts of respondents who reported no benefits.

Appendix 4 How Buyers Share Online Information

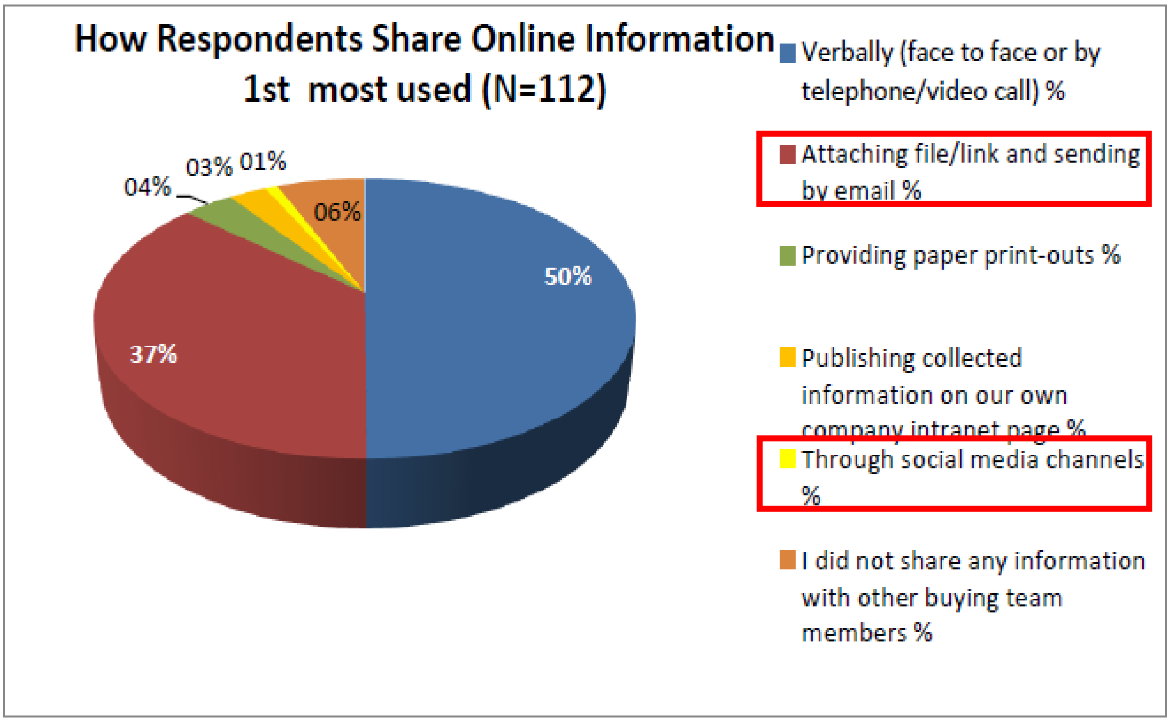

Figure 14 How buyers share online information they gather