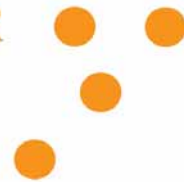


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# OmniAccess

CONSUMER



## Community Views

Prepared For:

National Packaging Covenant

9<sup>th</sup> – 11<sup>th</sup> May 2008



# OmniAccess Consumer Information

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- OmniAccess Consumer is a fortnightly Australian national omnibus survey that covers 1,000 adults aged 16 years and over, including both capital city and non-capital city areas.
- Interviews are conducted in-house using CATI (computer assisted telephone interviewing) with telephone numbers randomly selected from electronic White Pages. All interviewers are personally trained and briefed in-house.
- Quotas were set for capital city areas (in all states except Tasmania and the Northern Territory) as follows:

	<u>Capital City</u>	<u>Rest of State</u>	<u>Total</u>
NSW	240	100 (incl.ACT)	340
VIC	180	60	240
QLD	70	70	140
SA	70	40	110
WA	70	40	110
TAS	-	-	40
NT	-	-	20
		Total Sample Size	1,000

# Methodology

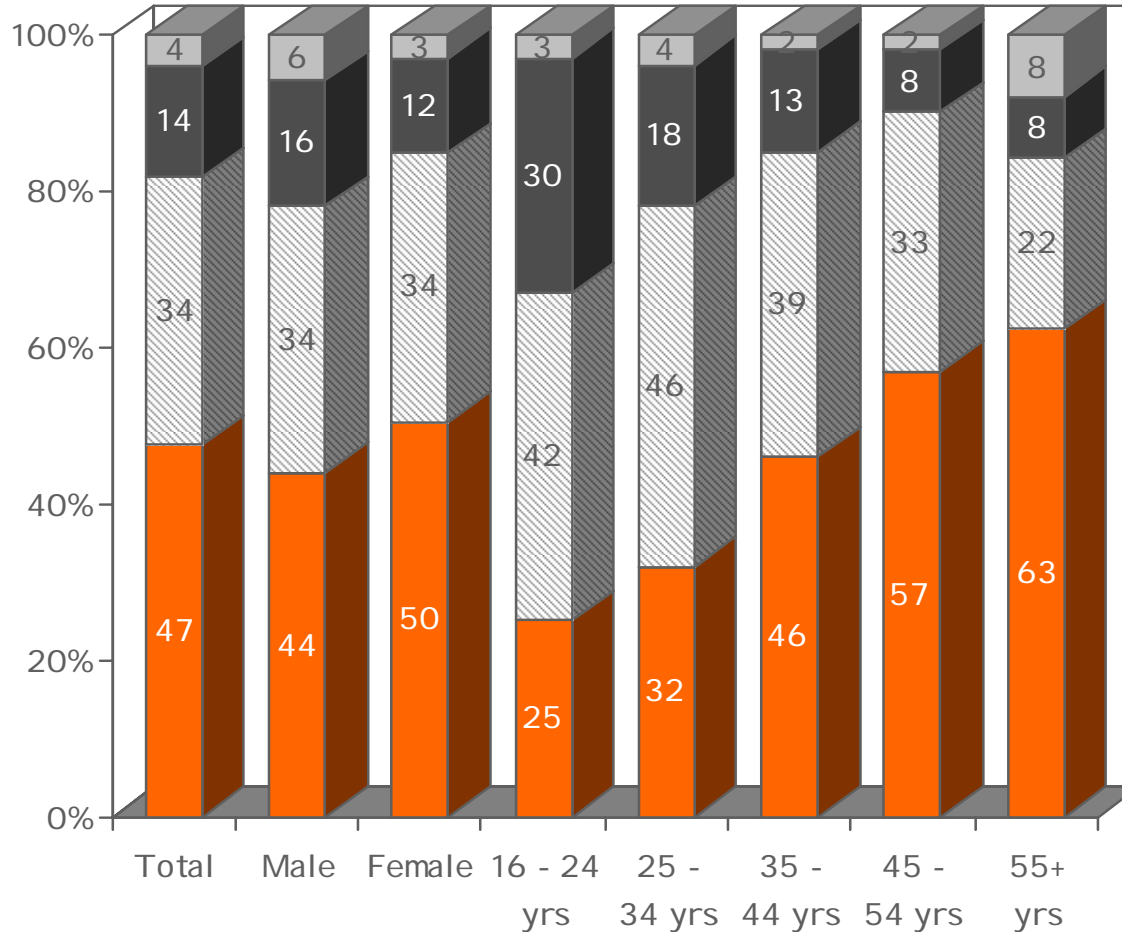
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- This study was conducted using the OmniAccess Consumer service between 9<sup>th</sup> – 11<sup>th</sup> May 2008.
- The questions for NPC were run for all respondents aged 16+ nationally (n=1,000).
- Following the completion of interviewing, the data was weighted by age, gender and areas to reflect the latest ABS population estimates.
- This document contains details of the methodology and a graphical presentation of the top line findings.

- Top line Results -

# Recycling Behaviour by Age and Gender

B1. Thinking about packaging of goods that can be recycled, which of the following statements best describes you?



81% of people claim to be often or always recycling packaging that can be recycled

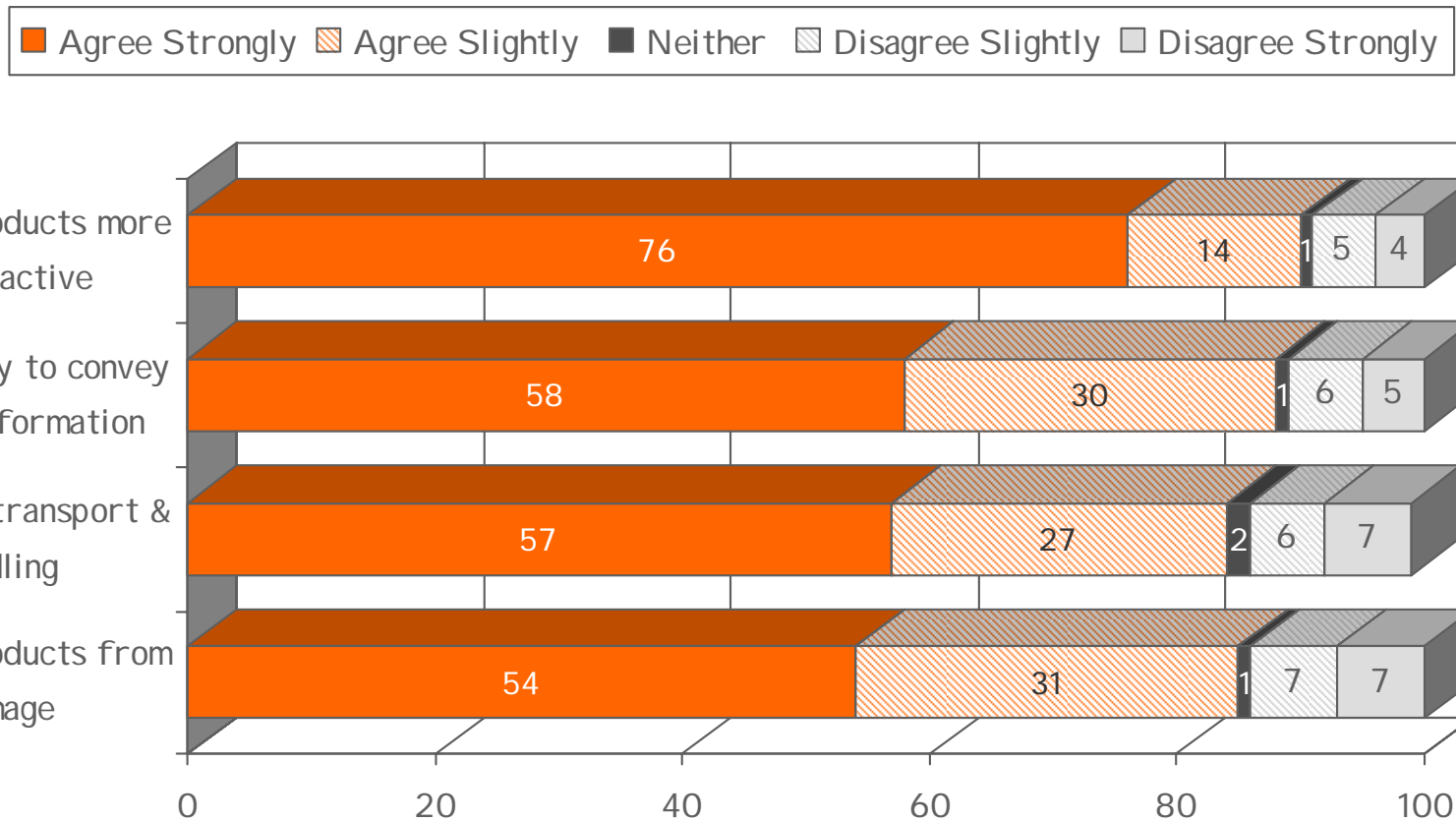
Those in NSW are most likely to be recycling packaging with 54% claiming to 'always' do it.

- Never recycle
- Sometimes recycle
- Often recycle
- Always recycle

Base: All respondents (n=1,000)

# Agreement with Packaging Design Statements

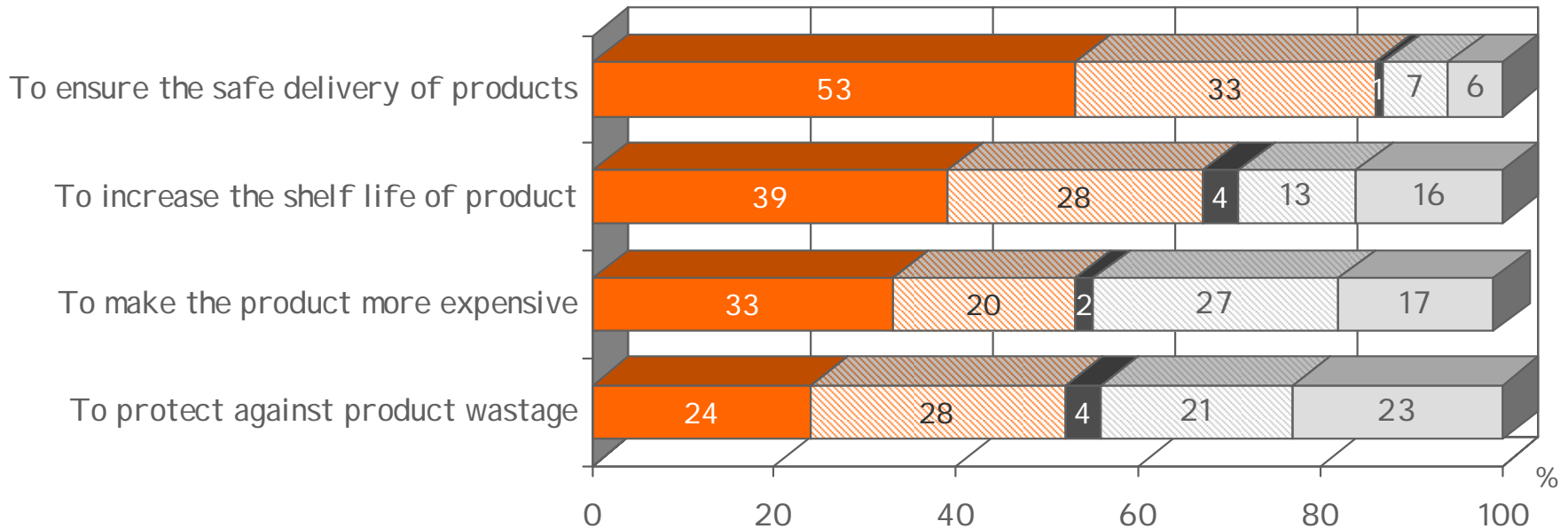
B2. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, packaging is designed [INSERT STATEMENT] would you agree or disagree? Would that be strongly or slightly? And what about, Packaging is designed .....?



Base: All respondents (n=1,000)

# Agreement with Packaging Design Statements Cont...

B2. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, packaging is designed [INSERT STATEMENT] would you agree or disagree? Would that be strongly or slightly? And what about, Packaging is designed .....?



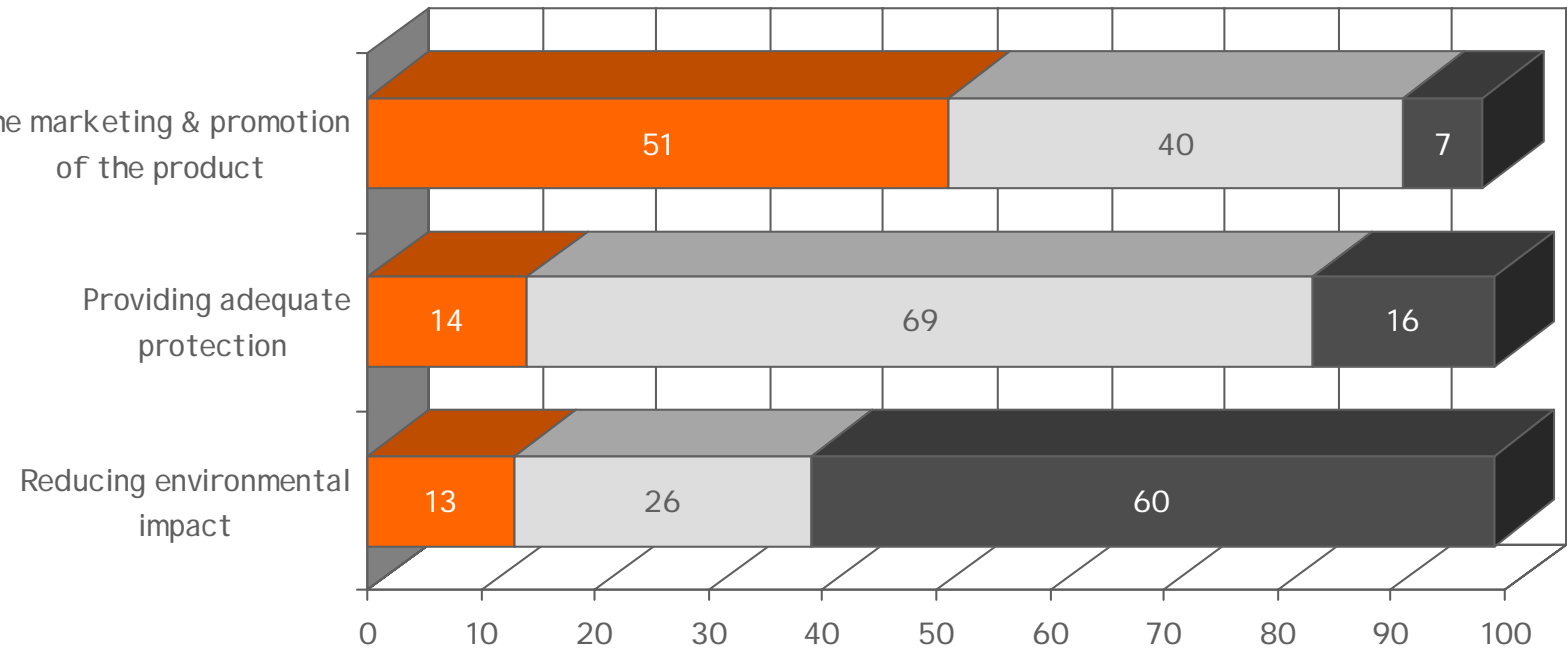
Base: All respondents (n=1,000)

# Perception of Emphasis in Packaging Design

B3. When designing packaging for products there are a number of considerations including things like; the marketing and promotion of the product, providing adequate protection to ensure undamaged products and also reducing any environmental impact. For each aspect I'd like you to tell me whether you feel the emphasis is about right, too much or too little. So firstly [INSERT ASPECT], do you think the emphasis in packaging design is generally about right, too much or too little.....?

60% of people think that there is not enough emphasis placed on reducing the environmental impact of packaging

Too Much About Right Too Little



Base: All respondents (n=1,000)

# Reasons Why Emphasis is 'Too Little' on Reducing Environmental Impact

B3b. You said that the emphasis in packaging design on reducing environmental impact is 'too little' Why do you say that?

PROBE FULLY

Reasons	(n=596) %
Because too much packaging is used /over packaging	39
I think too much plastic is used / hasn't been reduced	25
There is still a lot of packaging that isn't recyclable / environmentally friendly	21
Manufacturers are more concerned about how a package looks / will it sell	15
There is a lot of wastage / you have to throw away heaps of packaging	13
There's not enough being done - they could do better	8
Manufacturers don't care / no concern about the environment	5
Not enough info. on how to recycle - its not well promoted	5
It costs more to package with environmentally friendly materials / so companies don't like to do it	4
Other reasons	11

Base: All respondents thinking too little emphasis on reducing environmental impact (n=596)

# Effect Of Packaging On The Environment

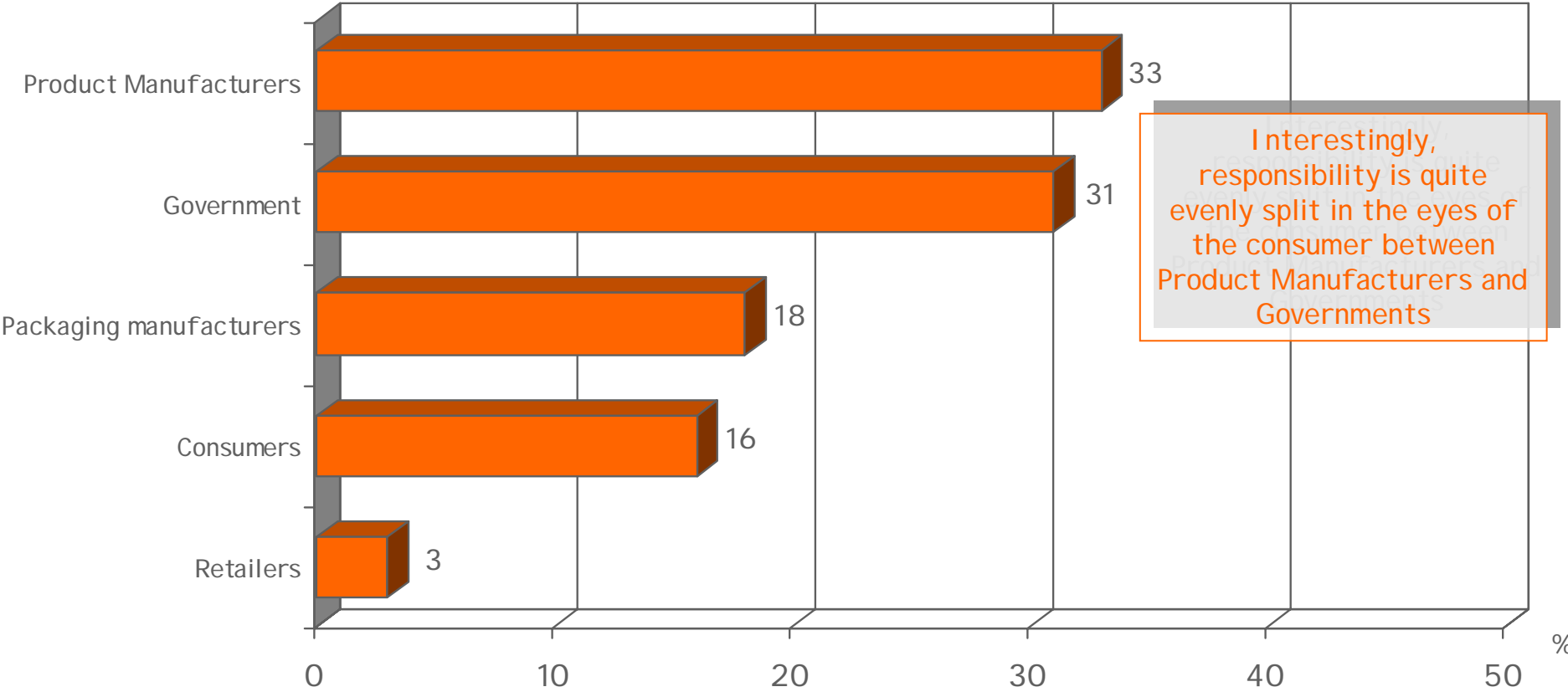
B4. How do you think packaging affects the environment? **PROBE FULLY**

Effects	(n=1,000) %
Too much waste from over packaging	20
Too much packaging is non-biodegradable / non-recyclable	16
Creating too much landfill	16
Depends on the packaging / the effect is lessened if its environmentally friendly	16
Plastic is especially bad / because it doesn't break down	15
Littering / people just dropping their rubbish / dirty	12
Packaging uses too many natural resources	9
It causes problems in the waterways / oceans	9
It affects native animals, birds etc.	9
It depends on how the waste is disposed of	8
Its made worse by the fact that lots of people don't recycle	7
Other reasons	27
Don't know	3

Base: All respondents (n=1,000)

# Responsibility For Minimising Environmental Impact of Packaging

B5. Who do you think should have the biggest role in minimising the environmental impact of packaging?

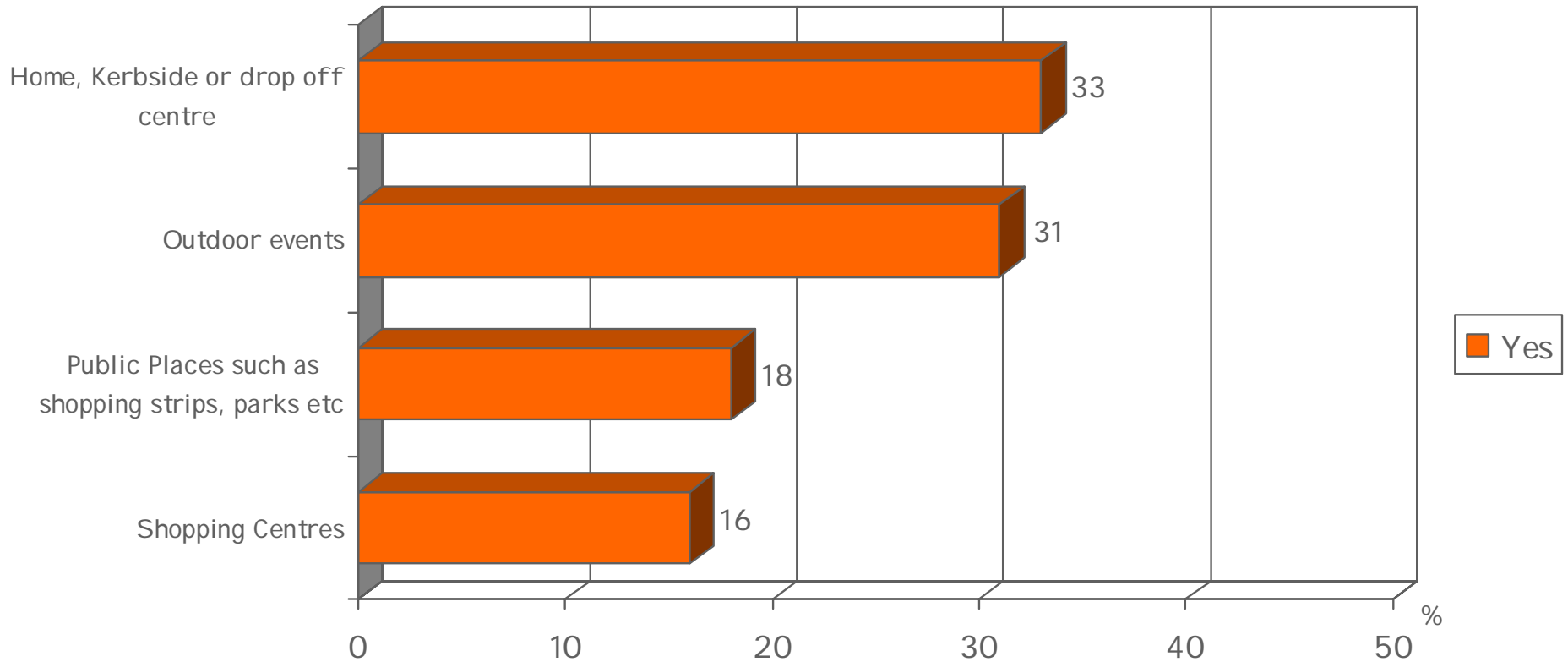


Interestingly, responsibility is quite evenly split in the eyes of the consumer between Product Manufacturers and Governments

Base: All respondents (n=1,000)

# Perceived Improvement in Recycling Facilities

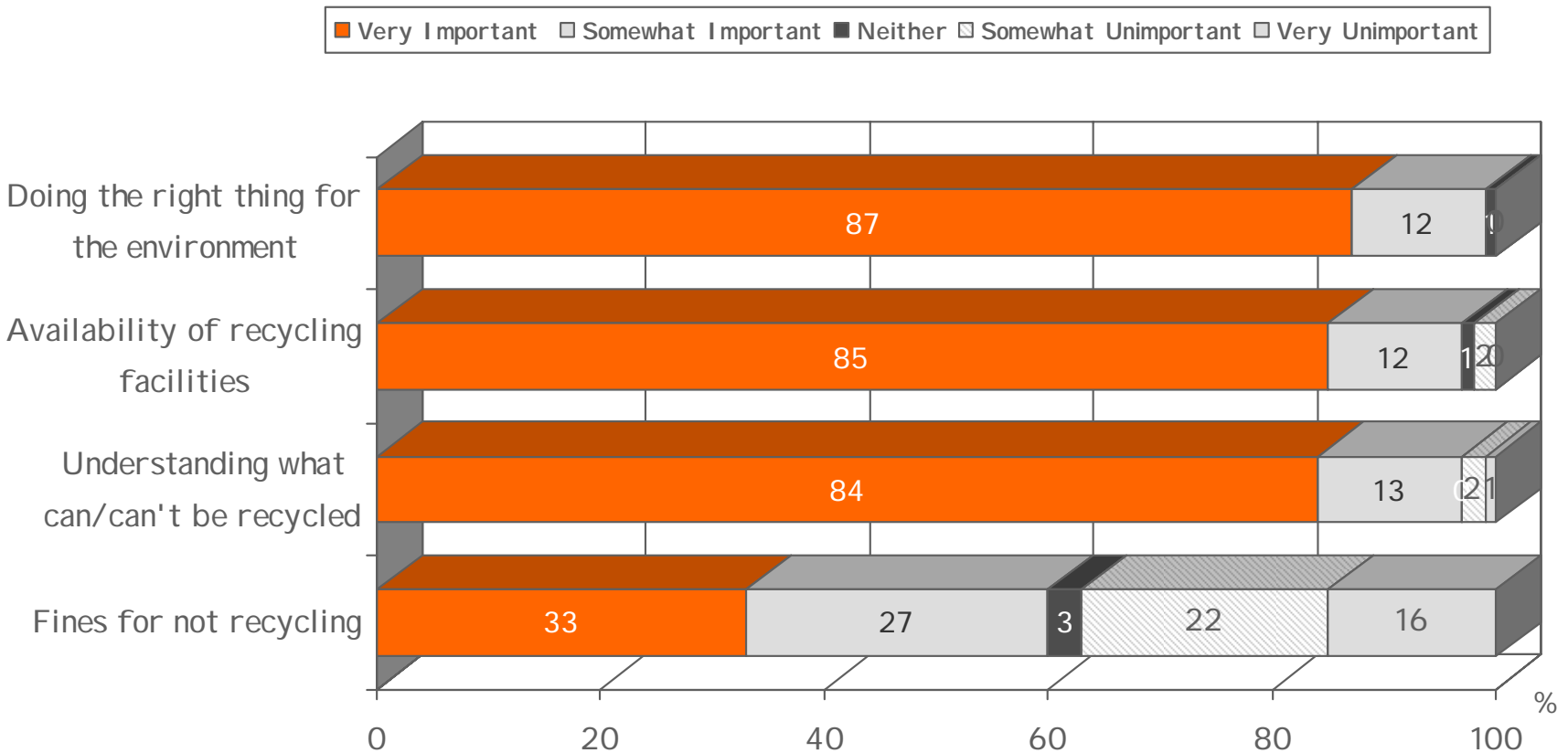
B6. Do you think that in the last three years there has been an improvement in the recycling facilities available to the community at [INSERT LOCATION]? And what about at.....?



Base: All respondents (n=1,000)

# Factors That May Encourage Recycling

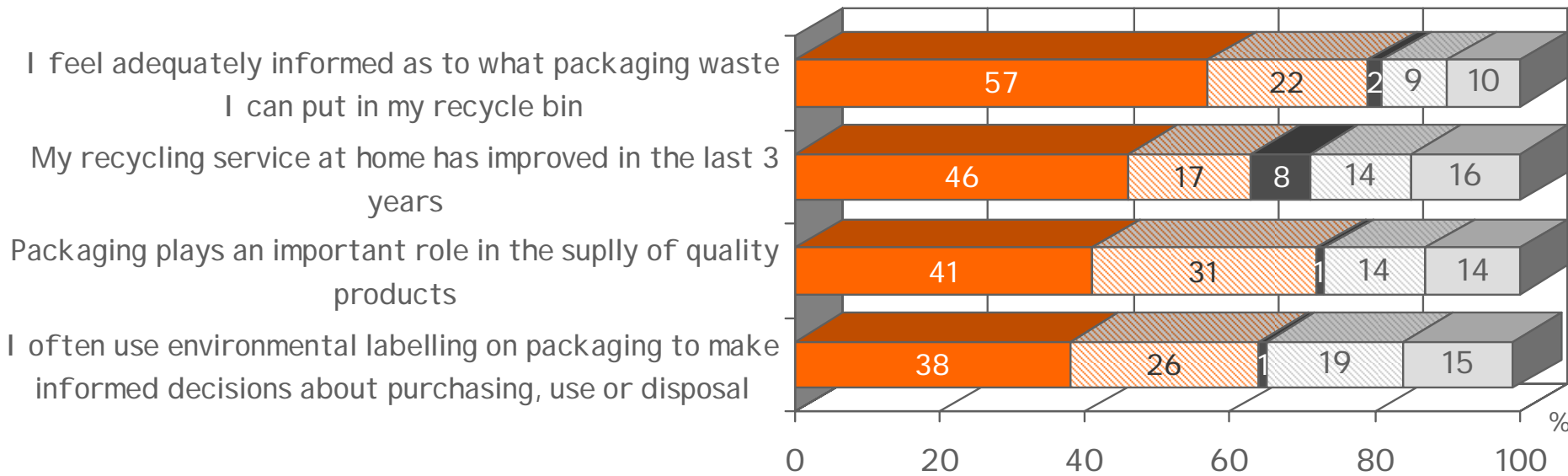
B7. Thinking about consuming packaged goods 'away from the home', how important would the following be to you in encouraging you to recycle, or recycle more? So firstly [INSERT STATEMENT]...would that be important or unimportant? Is that very or somewhat?



Base: All respondents (n=1,000)

# Agreement With Statements About Packaging

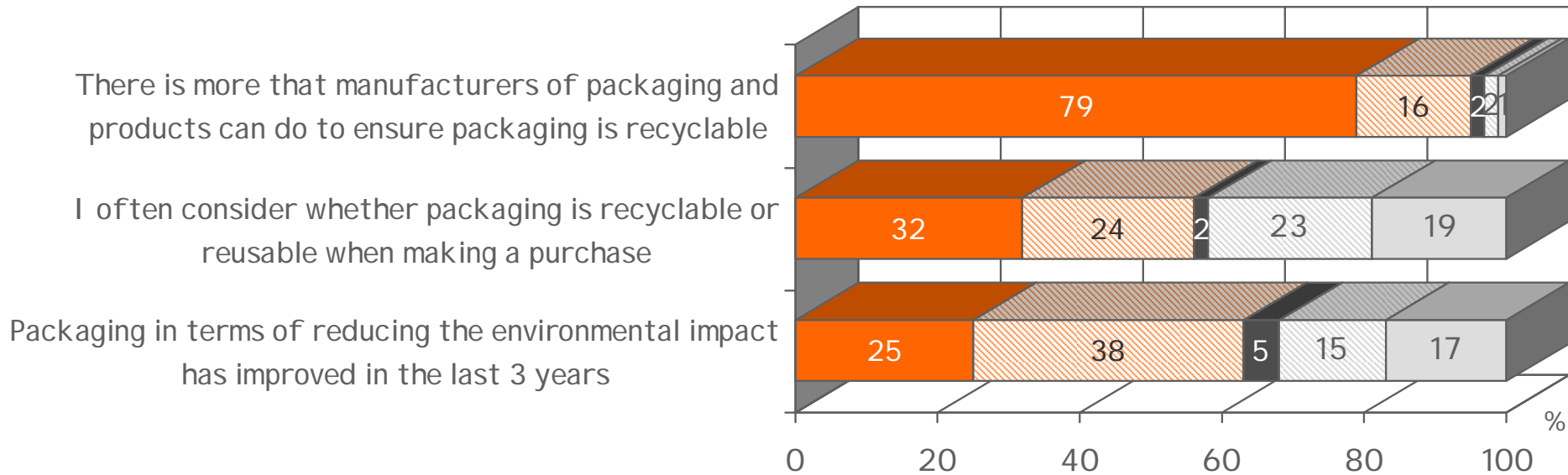
Q8. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, [INSERT STATEMENT] would you agree or disagree? Would that be strongly or slightly? SR. PER STATEMENT



# Agreement With Statements About Packaging

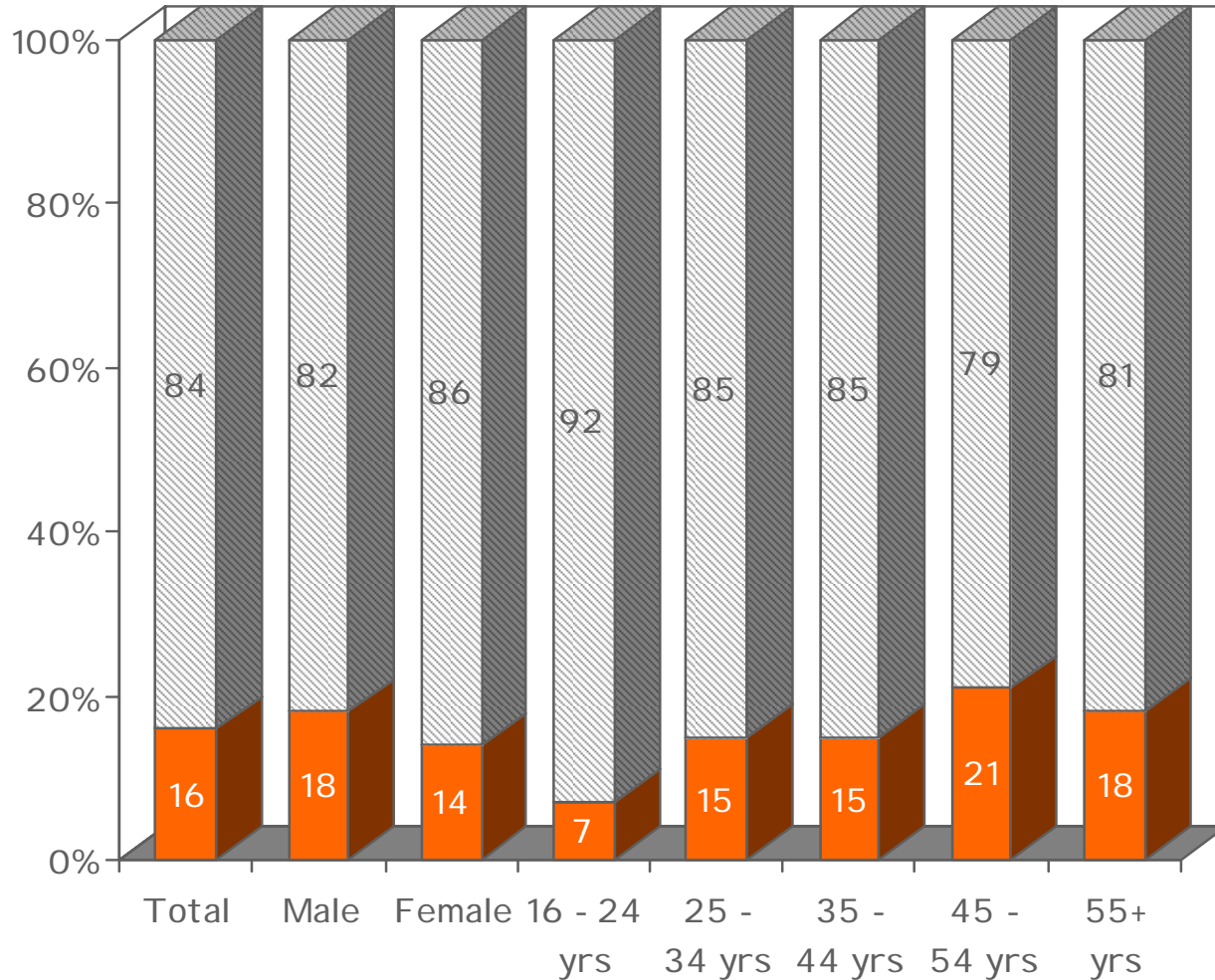
Q8. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, [INSERT STATEMENT] would you agree or disagree? Would that be strongly or slightly? SR. PER STATEMENT

■ Agree Strongly ■ Agree Slightly ■ Neither ■ Disagree Slightly ■ Disagree Strongly

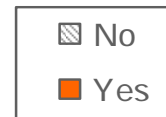


# Awareness of NPC

Q9. Before today, were you aware that packaging manufacturers, product manufacturers (e.g. Food, beverage, electrical etc.) and governments, have an agreement in place called the National Packaging Covenant, designed to minimise the environmental impact of packaging?.



Awareness levels of the NPC are quite low at 16% overall, with Males and those aged 45 - 54 years slightly more likely to be aware.



- Questionnaire -

# NPC – Community View Questions

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Q1. Thinking about packaging of goods that can be recycled, which of the following statements best describes you? **READ OUT. SR**

- |                             |   |
|-----------------------------|---|
| Always recycle packaging    | 1 |
| Often recycle packaging     | 2 |
| Sometimes recycle packaging | 3 |
| Never recycle packaging     | 4 |

Q2. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, packaging is designed [**INSERT STATEMENT**] would you agree or disagree? Would that be strongly or slightly? And what about, Packaging is designed .....? **SR. PER STATEMENT. ROTATE.**

## STATEMENTS:

- a) to ensure the safe delivery of products to consumers
- c) to make the product more expensive
- d) to protect against product wastage
- e) to increase the shelf life of a product
- f) for easier transport and handling of the product
- g) to make the product more attractive
- h) to protect the product from damage
- i) as a way to convey information about the product, for instance nature, composition, weight, quantity and storage life, guarantee of quality etc.

# NPC – Community View Questions cont...

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## Q3. READ OUT SLOWLY

When designing packaging for products there are a number of considerations including things like; the marketing and promotion of the product, providing adequate protection to ensure undamaged products and also reducing any environmental impact. For each aspect I'd like you to tell me whether you feel the emphasis is about right, too much or too little. So firstly [INSERT ASPECT], do you think the emphasis in packaging design is generally about right, too much or too little.....? READ OUT. ROTATE ASPECTS. SR.

- a) The marketing and promotion of the product
- b) Providing adequate protection to ensure undamaged products
- c) Reducing the environmental impact

## RESPONSE FRAME:

Too much	1
About Right	2
Too little	3
Don't know DNRO	4

ASK IF CODE 3 at 'Reducing environmental impact' OTHERS SKIP TO NEXT QUESTION.

Q3b You said that the emphasis in packaging design on reducing environmental impact is 'too little' Why do you say that? PROBE FULLY.

## NPC – Community View Questions cont...

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Q4. How do you think packaging affects the environment? **PROBE FULLY.**

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Q5. Who do you think should have the biggest role in minimising the environmental impact of packaging? **READ OUT, SR, ROTATE**

Consumers	1
Packaging manufacturers	2
Product manufacturers eg. food, beverage, electrical etc.	3
Retailers	4
Governments	5

# NPC – Community View Questions cont...

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Q6. Do you think that in the last three years there has been an improvement in the recycling facilities available to the community at [INSERT LOCATION]? And what about at.....? READ OUT. ROTATE. SR.

## STATEMENTS:

- a) Outdoor events
- b) Shopping centres
- c) Public places such as shopping strips, parks, other open spaces.
- d) Home, kerbside or drop-off centre

## RESPONSE FRAME

Yes	1
No	2
Don't know DNRO	3

# NPC – Community View Questions cont...

---

Q7. Thinking about consuming packaged goods 'away from the home', how important would the following be to you in encouraging you to recycle, or recycle more? So firstly [INSERT STATEMENT]...would that be important or unimportant? Is that very or somewhat? **READ OUT. SR. ROTATE.**

## STATEMENTS:

- a) understanding what can and can't be recycled
- b) availability of recycling facilities
- c) Fines for not recycling
- d) doing the right thing for the environment

## RESPONSE FRAME

- |                      |   |
|----------------------|---|
| Very important       | 1 |
| Somewhat important   | 2 |
| Neither / Nor DNRO   | 3 |
| Somewhat unimportant | 4 |
| Very unimportant     | 5 |

## NPC – Community View Questions cont...

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Q8. I'm now going to read out a few statements that other people have made regarding packaging and I'd just like you to tell me to what extent you would agree or disagree with each one. So firstly, [INSERT STATEMENT] would you agree or disagree? Would that be strongly or slightly? **SR. PER STATEMENT**

### STATEMENTS:

- a) I feel adequately informed as to what packaging waste I can put in my recycle bin
- b) My recycling service at home has improved in the last 3 years
- c) Packaging plays an important role in the supply of quality products.
- d) I often use environmental labeling on packaging to make informed decisions about purchasing, use or disposal
- e) There is more that manufacturers of packaging and products (e.g. food, beverage, electrical, etc.) can do to ensure packaging is recyclable
- f) Packaging design in terms of reducing its environmental impact, has improved in the last 3 years
- g) I often consider whether packaging is recyclable or reusable when making a purchase

# NPC – Community View Questions cont...

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Q9. Before today, were you aware that packaging manufacturers, product manufacturers (e.g. Food, beverage, electrical etc.) and governments, have an agreement in place called the National Packaging Covenant, designed to minimise the environmental impact of packaging?.

## RESPONSE FRAME

Yes	1
No	2
Don't know DNRO	3

# Classification Questions

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*Good ..., my name is ... from Woolcott Research. We are currently conducting a survey on people's attitudes towards a number of issues. Could I please speak to someone in the household aged 16 or over.*

**RE-INTRODUCE IF NECESSARY AND CONTINUE.**

## RECORD AREA:

Sydney	1	Adelaide	7
Other NSW	2	Other SA	8
Melbourne	3	Perth	9
Other Victoria	4	Other WA	10
Brisbane	5	Tasmania	11
Other Queensland	6	NT	12

## RECORD GENDER:

Male	1	Female	2
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## CHECK QUOTAS

Q1. Firstly, could you please tell me, are you over or under 40 years of age? **IF UNDER 40 YRS, READ OUT CODES 1-5. IF OVER 40 YRS, READ OUT CODES 6-12.** Are you...

16-17 years	1	40-44 years	6
18-24 years	2	45-49 years	7
25-29 years	3	50-54 years	8
30-34 years	4	55-59 years	9
35-39 years	5	60-64 years	10
		65-69 years	11
		70+years	12

# Classification Questions Cont...

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*Finally, a few questions to ensure that we have spoken to a good cross-section of people.*

Qi. Which of these categories best describes you?

Working full time	1	Unemployed	4
Working part time	2	Engaged in home duties	5
Student	3	Retired	6
		Refused (DO NOT READ OUT)	7

Qii. Thinking now about the main income earner in your household. What is their occupation?  
RECORD BELOW. IF NOT WORKING: Have they ever worked?  
IF YES: What was their most recent occupation?

Industry: \_\_\_\_\_ Position: \_\_\_\_\_

Qiii. Could you please tell me which of the following categories best describes your household income before tax? **READ OUT**

Under \$20,000	1	\$60,000-\$69,999	6
\$20,000-\$29,999	2	\$70,000-\$79,999	7
\$30,000-\$39,999	3	\$80,000-\$89,999	8
\$40,000-\$49,999	4	\$90,000-\$99,999	9
\$50,000-\$59,999	5	\$100,000 plus	10
		Refused (do not read out)	11

## Classification Questions Cont....

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Qv. Which of the following best describes your current marital status? **READ OUT**

Never married	1
Defacto or living together	2
Married	3
Separated/divorced/widowed	4
Refused (do not read out)	5

Qvi. Could you please tell me how many people, including yourself, live in your household? **RECORD BELOW.**

Qvii. And how many of those people are children under the ages of 18? **RECORD BELOW.**

	<u>Qvi.</u>	<u>Qvii.</u>
One	1	1
Two	2	2
Three	3	3
Four	4	4
Five+	5	5
None	6	6
Refused (do not read out)	9	9

## Classification Questions Cont...

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Q2 Thinking about the grocery buying in your household, which of the following best describes your role?

Would you say you are.....

**READ OUT . SINGLE RESPONSE.**

- |  |   |
|--|---|
| Mainly responsible for grocery shopping  | 1 |
| Jointly responsible for grocery shopping | 2 |
| Or Not responsible for grocery shopping  | 3 |

Qix Which of the following best describes your highest level of education?

**READ OUT. SINGLE RESPONSE.**

- |  |   |
|--|---|
| Some secondary school                          | 1 |
| Intermediate or School Certificate             | 2 |
| Leaving Certificate or High School Certificate | 3 |
| Trade Qualifications or Diploma                | 4 |
| University Undergraduate degree                | 5 |
| University Post graduate degree                | 6 |

# Contact Us

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For any further information or any additional analysis, please feel free to contact the OmniAccess Team:

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