

Product stewardship benefits assessment General population report

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FUNDAMENTAL SUPPORTIVE ATTITUDES EXIST BUT SPECIFIC PRODUCT STEWARDSHIP KNOWLEDGE IS LACKING

Those who were surveyed generally displayed strong environmentally aligned attitudes that are supportive of reducing the environmental and health impacts of products. Most emphasis and understanding historically relates directly back to recycling and responsible disposal rather than newer and emerging concepts such as product stewardship. However, there is evidence that as new concepts, practices and initiatives are promoted, Australians actively engage with emerging concepts (examples of the newer container deposit schemes and consideration of single-use plastics demonstrate this). Currently, specific understanding of product stewardship and related concepts is relatively low. This presents an opportunity to engage with consumers by bringing new concepts into the conversation.

KEY DRIVERS FOR PURCHASE DECISIONS RELATE TO DURABILITY AND LONGEVITY

Product durability and longevity are key purchase considerations, even for those within the survey sample not actively seeking to increase responsible consumption. Durability is the most frequently considered factor in the purchase of products. Having a product last longer is an easy way to reduce its waste impact. However, it is noted that consideration of durability is most likely related to traditional consumer decision-making patterns (i.e. maximising utility via longer product life), rather than a conscious decision to reduce negative impacts on human health and the environment.

Beyond durability, other design considerations such as general consideration of environmental impacts of a product, elimination of hazardous materials and no harm to humans are top of mind for consumers. While recycling is an ingrained habit for most Australians, recyclability is less likely to be a pivotal purchase consideration.

Recyclability is fully supported and consumers would like to be more mindful of the use of recycled materials and their ability to recycle– consumers are likely to act where recycling opportunities present themselves, even if they are not making purchasing decisions that are specific to this.





HISTORY SHOWS THE MESSAGES MUST BE SPECIFICALLY PUSHED TO CONSUMERS

Those surveyed were largely unfamiliar with the concept of product stewardship and many therefore leant on existing knowledge of familiar concepts. Some topics such as littering, waste versus recycling, and single-use plastics are already well understood through heavy promotion and ongoing education, raising their profile in Australians' daily lives above other topics. Promotion of these topics over a long period of time has also linked responsibility clearly to certain entities including Councils and waste service providers (as opposed to producers and sellers).

There is opportunity to build the profile of product stewardship through avenues that are already familiar to Australians for similar information. Overall, generating conversation and understanding has the potential to create momentum relatively quickly, as seen with single use plastics. Consideration may need to be given as to whether product stewardship can gain similar momentum as more concrete topics, and whether language and concepts should be selectively used to avoid confusion.

Further testing around which language and concepts are most easily accessible may be beneficial.

BOTH CENTRALISED AND IMMEDIATE INFORMATION SOURCES NEED TO BE AVAILBLE

Information on product stewardship initiatives is largely gained via passive information consumption i.e. at collection points or on packaging. The ability to obtain information at these relevant points in the Consumption and Post-consumption lifecycle stages will continue to be important for easy engagement.

It can often be difficult to find information on other topics such as recycling and repair options, when it is proactively so ught. Improvements to consumer information provided by product owners and establishment of a centralised information source would assist in supporting Australians who wish to know more, and guide them to be better informed.



UNFAMILARITY OF PRODUCT STEWARDSHIP AND ASSOCIATED CONCEPTS CONTRIBUTES TO DEFAULT CONSUMER BEHAVIOUR

While most of those surveyed support and are attitudinally aligned towards product stewardship and circular economy concepts, many default to traditional purchase considerations and these kinds of behaviours result. Examples of this that were identified in the research include:

- Consideration of quality and durability in purchase decisions being linked to traditional notions of product utility rather than positive health or environmental outcomes
- The strong role that retail outlets, packaging instructions and point-of-sale information play in enabling easy engagement with initiatives
- Low levels of active information seeking, particularly in relation to specifics such as end-of-life disposal and environmental and social indicators

Understanding that the survey sample defaults to traditional decision-making considerations is critical to guiding future strategy:

- This may mean strong leveraging of retail and POS opportunities for both drop off services and information provision
- The utilisation of relationships with local councils will make complete sense to Australians
- Discussions around why consideration of durability and longevity are beneficial to the environment, not just their hip pocket, can encourage a broader understanding and link key decision-making behaviour to product stewardship outcome benefits

... GENERATIONAL DIFFERENCES ALSO EXIST AND ARE CONSISTENTLY HIGHLIGHTED



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AUSTRALIANS ARE AT EARLY STAGES WHEN IT COMES TO CONSCIOUSLY ADOPTING PRODUCT STEWARDSHIP BEHAVIOURS BUT THERE IS SIGNIFICANT OPPORTUNITY TO INCREASE THIS

Half of those surveyed are not engaging in product stewardship and circular economy practices to any great degree. There is significant scope to increase consumers' consideration of these concepts in their purchasing behaviour. Half (52%) of those surveyed demonstrate limited intentional product stewardship consideration behaviours, while 12% are 'Enthusiasts', actively engaging in a number of behaviours with strong underlying values and prioritisation.

There are a number of areas where efforts could be focused to encourage increased behaviour:

- Building awareness of the relevance of product stewardship and circular economy across the full product lifecycle (i.e. beyond current focus on end-of-life) will be pivotal to driving momentum and engagement. This would be further aided by highlighting how elements of durability, quality design and extending use have benefits beyond value for money
- There is opportunity to encourage those who are motivated or already engaged to engage further, primarily through continued promotion of available initiatives and improving understanding of key concepts. Beyond Container Deposit Scheme (CDS) initiatives, those of most interest include Officeworks recycling and ALDI battery recycling
- There is a strong role for retail elements and point-of-sale to convey information related to product stewardship initiatives and to prompt 'opportunistic' engagement
- Ease, convenience and accessibility are key success factors to increasing behaviour
- Continued promotion of available product stewardship initiatives will naturally flow through to increased engagement (provided they appear easy and accessible)



PRODUCT STEWARDSHIP INITIATIVE SUCCESS FACTORS RELATE TO EASE, CONVENIENCE AND ACCESSIBILITY AS WELL AS WIDE SPREAD PROMOTION

Engagement in specific product stewardship initiatives is most prominent and successful with those initiatives that have good accessibility (especially those linked to other consumer interactions), making it easy to repetitively engage with them. These factors are also key barriers for some initiatives which are rated as more difficult to engage with.

If service design allows for ease, convenience and accessibility, then ongoing promotion of product stewardship initiatives has the potential to lead to increased engagement, as evidenced by container disposal schemes.

CONSUMERS CONSIDER SOLUTIONS DISCRETELY, NOT SYSTEMATICALLY

The data indicates that consumers largely silo the stages of the Product Lifecycle in terms of who has responsibility, input and a need to drive action at each stage. This suggests that consumers are less conscious of systematic responses that can be implemented to address these issues.

The roles of the state and federal governments are not considered an overall priority and there is lack of understanding of how certain stakeholders can exert influence across the Lifecycle stages, e.g. how consumers can and should play a role; lifetime responsibilities of Manufacturers; how policy and regulation may support overarching stewardship and the circular economy.

Consumers are also largely unaware of their role and the impact they can have on each phase of the Lifecycle. Production is largely perceived to be in the hands of manufacturers and brand owners. This can potentially underplay the consumers' role in demanding products that align with product stewardship concepts, either via consumer demand or political influence for regulation.



RESEARCH CONTEXT

Background, objectives and methodology



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RESEARCH BACKGROUND AND OBJECTIVES

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Background

This report is part of a larger project conducted by the Institute for Sustainable Futures (ISF) at the University of Technology Sydney along with the Product Stewardship Centre of Excellence to evaluate the effectiveness and benefits of product stewardship and Extended Producer Responsibility (EPR) activities across Australia. The current research focuses on the *general population* audience as a key audience group to assess their awareness and understanding when evaluating benefits assessment as purchasers, users and disposers of products.

Objective

The primary objective of this research is to assess awareness and understanding of product stewardship (PS) in the Australian general population. Additional areas of focus were established to drill down further into their relationship and perceptions of PS. These priorities were used as a central part of the project's design and analysis throughout the report.

	Key focus area	
		What is the understanding/awareness of product stewardship?
		Does the general population understand product stewardship as a term?
		What does a responsible steward look like?
		Does this relate to lifecycle stages?
	Awareness and understanding	Who do members of general population consider to be responsible for the lifecycle impact of products?
Primary		How do we test awareness of product stewardship schemes? Knowledge about product stewardship schemes for different products, accessibility
Objective Assess wareness		Characterise the level of awareness of product stewardship and specific schemes? E.g. is it limited to National Television and Computer Recycling Scheme or MobileMuster?
lerstanding	Additional focus areas	
		How effective are product stewardship schemes at engaging with community?
	Engagement	Use examples of schemes to understand how familiar/engaged they are with a particular scheme?
		Where do consumers gather information?
		What are expectations around repair, reuse, take-back?
	Expectations	What are environmental expectations?
		Who should pay for management at end of life?



METHODOLOGY

Approach

Data was collected via an online survey and was completed between 18 March and 1 April 2022. The full interview length was 15 minutes.

Note regarding the approach used for the inclusion criteria of product stewardship initiatives: The initiatives list included in this survey is not an exhaustive sample of product stewardship initiatives. A mix of more commonly known collective and individual business initiatives were included in the sample to represent diversity of product classes as well as geographic scope.

Target audience

Total sample of n=1001 residents among the general population.

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Total
Metro	207	193	96	56	83				
Regional	113	62	102	16	22	No re	egional Qi	uotas	
Total	320	255	199	73	105	22	9	17	1000

Data

Where results do not sum to 100%, this may be due to computer rounding, multiple responses, or the exclusion of 'don't know' categories.

Non-interlocking quotas were applied to age, gender and location.

Data was post-weighted to the latest (2016) ABS population statistics to ensure results are robust and representative (as shown in the table below).

▲ ▼ Arrows indicate when there is a significant difference higher or lower than the total population at 95% confidence level and above.

18-24 years	25-34 years	35-49 years	50+ years	Total	Male	Female	Total
118	185	260	437	1000	493	507	1000



DEMOGRAPHIC PROFILE OF SAMPLE

		Sample size		Sample size
•	Male	483	Employed*	590
Gende	r Female	518	Not working*	98
	18 – 24 years	117	employment status	38
	25 – 34 years	176	Homemaker*	50
Age	35 – 49 years	263	Retired	225
	50+ years	445	Unemployed	411
	New South Wales	319	None of the above	290
	Victoria	258	Business Professional Services White Collar	108
		196	Industry Blue Collar	38
	South Australia	75	Healthcare/Pharmaceuticals	46
State		75	Consumer goods/Retail	26
	West Australia	106	Government/Politics/Education	50
	Tasmania	22	Front of house Blue Collar	32
	Northern Territory	8	Up to \$50,000	457
	Australian Capital Territory	17	Annual personal \$50,000-\$79,999	205
	Inner Region Australia	314	gross income \$80,000-\$124,999	177
D	Major Cities of Australia	646	before tax \$125,000 or more	87
Regions	s Outer Region Australia	35	Dont know/No Answer	75
	Remote Australia	6	Identify as a person Yes - ATSI	25
	Post graduate	124	of Aboriginal or _{No} Torres Strait	963
Regior	Currently studying or completed Bachelor / Honours degree / Undergraduate diploma	366	Islander descent ^{Prefer} not to say	13 89
of education	Completed some or all of TAFE/College certificate	275	Language other No	903
	Now studying or completed HSC / Year 12 / 6th Form	116	than English	9
	Completed some or all of Year 10/4th Form or lower	120	Total	1,001

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11 – © Ipsos | UTS Institute for Sustainable Futures | Product Stewardship Benefits Assessment | General Population 2022 Report YEAR/MONTH. What is your date of birth?, GENDER_NONBINARY_. Which of the following describes how you think of yourself?, QMKT SIZE_AU. Please insert your residential/home postal code, EMP01. What is your current employment status?, IndIndiv02. In which industry do you work?, What is your highest level of education attained?, AUS01INC. Which of the following categories best describes your annual personal gross income? (Gross income is the total income before taxes), Q27. Do you identify as a person of Aboriginal or Torres Strait Islander descent?, Q28. Do you speak a language other than English at home? (Sample size n=1001).

PRODUCT LIFECYCLE FRAMEWORK



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THE PRODUCT LIFECYCLE STAGES

Product lifecycle stages refer to the key points of time within a product's life – production, consumption and post-consumption. Product stewardship initiatives and actions to improve to the environmental impact of a product more broadly can be mapped back to the product lifecycle stages. Mapping these actions back to the product lifecycle allows us to identify, among other things, which stages are currently addressed within existing initiatives and where there are gaps.

We have used this framework consistently as a reference point throughout the report to map consumer attitudes and behaviours - for example:

- · what consumers consider most important for companies to consider when designing products,
- · consumer behaviours when purchasing products and their disposal practices,
- · how these actions influence participation in future product stewardship initiatives and more.

Product lifecycle stage	Activities of each lifecycle stage	Actions
Production	Materials, design, manufacturing	 Responsible supply chain practices Better material choices and/or design (including packaging) Better product design Efficient resource use including emissions management, reduction and/or use of renewable energy
Consumption	Retail, use and reuse	 Consumer information promoting better product use Innovative business models, circular business models Promoting high quality products Product trade-in and/or repair services
Poot consumption	Logistics and collection	Providing take-back services, improving access and convenienceBetter logistics solutions
FOST-CONSUMPTION	End of life	Material recovery (recycling and reprocessing)New end-markets



LIFECYCLE FRAMEWORK: Overview of key findings (Consumers)

Consumer's focal point for behaviour when it comes to product stewardship and circular economy is currently on Post-Consumption. They see themselves having a clear role here and undertake a number of end-of-life actions which are clearly linked to benefiting the environment. Findings from both the Production and Consumption stages show that consumers also want products to have greater longevity, however, it is likely that this is a key purchase driver from a traditional consumerism context (i.e. wanting products they have paid for to last as long as possible to achieve value) rather than solely for social or environmental purposes.

Post-Consumption (End of life)

Consumers consider themselves to have a key role in postconsumption behaviour (see, slide 23).

They are actively engaging in recycling behaviour and to a lesser degree utilising product stewardship initiatives and selling to others. Recycling is historically ingrained as an acceptable consumer end of life action – yet may not be priority when considering which product to purchase (see, slide 44).

While there is some acceptance of costs incurred for consumers at this stage this is not widely supported with much of the emphasis being placed on manufacturers and brand owners (see, slide 26). Consumers also see very clear responsibilities for waste service providers and local councils as key players in addition to themselves (likely due to historical association of who deploys recycling services). To a lesser degree federal and state government (see, slide 23).



Consumption (Use, Reuse, Retail)

Consumers are a key player in the Consumer stage by default.

Consumers place significant priority on elements that support product longevity – but more so from a design and production point of view (durability and quality). However, caution should be taken in interpretation of consumer focus on durability as this is likely to be driven more so by a traditional consumer requirement to gain value and minimise replacement spending than specifically to achieve product stewardship and circular economy benefits (see, slide 32).

In addition to durability, reuse capability and repairability is of interest to consumers. There is less appetite for leasing, sharing and second hand purchasing given the current services on the market (see, slide 32).

Production (Materials, Design, Manufacturing)

Consumers are least likely to actively consider and engage in the Production stage of the lifecycle. They foresee clear responsibility of Manufacturers and Brand owners in making sure that products avoid negative impacts or have positive impacts on humans and the environment. This risks consumers underplaying their own role in demanding products that are designed from the outset with a product stewardship intent (see, <u>slide 23)</u>.

Durability and quality are key expectations from consumers. Following this, avoiding or eliminating hazardous material use is also at the forefront of consumers' minds. Other aspects such as no harm to people, incorporation of recyclable and renewable materials and the production of a carbon / pollution footprint are least considered across this lifecycle. Yet there is clear consumer support for ensuring all of this is taken into account by manufacturers and brand owners (see, slide 32).

Life cycle stages are overlaid by colour throughout the report content using this legend. There is a hyperlink embedded within the legend to return to this page for reference if required.

Lifecycle	Production (Materials, Design, Manuf acturing)
stages	Consumption (Use, Reuse, Retail)
logona	Post-Consumption (End of life)



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LIFECYCLE FRAMEWORK: Summary of evidence (Consumers)

This slide provides supporting data evidence from across the survey as relevant to each lifecycle stage.

- 44% consider that **consumers and individuals have primary responsibility** for managing social and environmental impacts at end of a product's life (most common response)
- 39% consider waste management/recycling services and 30% consider local council as being primarily responsible
- Subsequently, responsibility is also given in degrees to brand owners (21%), manufacturers (21%), state governments (19%) and federal govt (18%)
- 35% want end of life cost to be born by manufacturers
- 26% believe consumers should pay
- Recycling is a key action for consumers:
- 84% 'agree' that recycling effectively makes a difference to the environment
- 32% avoid products that have non-recyclable packaging and 75% consider recyclability of a product or packaging as 'important'. However, when contrasted directly against longevity factors (such as durability consideration in design) recyclability is often less 'essential' when it comes to decision making
- Most recycling is done at home (75%), but also via kerbside collection (39%), transfer stations or resource recovery centres (33%)
- Some out-of-home recycling is occurring at retail outlets/supermarkets (31%) and post back recycling services (7%)
- Information seeking behaviour for recycling and responsible disposal is relatively high (68% and 63%). For both, approximately half found this info searching 'easy' and one quarter found it 'difficult'
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- It is seen to be the responsibility of the Manufacturer (58%) and Brand owner (43%) to consider the product's social and environmental impact [16% see a role of responsibility for individuals here]
- **Durability** is 'often considered' (56%) when purchasing products and is considered 'essential' to 38% when making purchase decisions. It is perceived to be the top most factor that companies should consider when designing products
- 39% 'often consider' **hazardous substances** when purchasing products and 29% consider elimination of hazardous products to be 'essential'
- 31% 'often consider' products made from recycled material and 28% consider renewable material incorporation when purchasing products
- 30% 'often consider' carbon footprint and energy efficiency of production when making purchase decisions – although when raised specifically, 62% consider pollution created in making the product 'important' and a Waste Star rating is considered 'important' by 58% (much less so than the level of importance placed on Energy Star Rating and recyclability)
- 31% consider no harm to people as 'essential' when purchasing products (social impact)
- 85% agree that repairing and reusing makes a difference to the environment
- 79% agree that businesses should provide customers with an easy way to repair or recycle their used products
- **Reuse of disposable items** is common (66% often do this), while **repair is less common** (47%) and considered less 'essential' when making purchase decisions (23%)
- Durability, user instructions, self-repair instructions are all considered highly useful information to aid with longevity (53%, 49% and 43% respectively)
- Second hand product purchase is less common with 26% 'often considering' this when purchasing products
- Leasing, renting and sharing consumption behaviour is not widely done nor desired at present



ATTITUDES AND **KNOWLEDGE OF** PRODUCT **STEWARDSHIP** CONSIDERATIONS



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Australians have strong positive attitudes when it comes to making a difference and reducing the impacts that waste has on the environment

Those surveyed strongly agree that repairing, reusing and recycling all make a difference to minimising impact on the environment. However, they are less inclined to want to stay informed on the topic, indicating that it is not a high priority for many.

More than half of those surveyed (57%) agree that businesses should be taking the financial burden of stewardship at the post-consumption stage.





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Q3. To what extent do you personally agree or disagree with each of the statements below? (Sample size n=1001) Asked of all participants. Results under 3% not shown.

Positively aligned attitudes are much the same regardless of demographic profile

There are no significant demographic differences amongst those surveyed who have positive environmental attitudes.

Column % Total Agree (somewhat + strongly)	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Repairing and reusing products makes a difference to minimising our impact on the environment	83%	88%	85%	79%	85%	88%	86%	85%	77%	100%	85%	855
Recycling effectively makes a difference to the environment	83%	84%	83%	79%	83%	86%	83%	85%	80%	100%	84%	838
I believe all businesses who make, sell or lease products should provide customers with an easy way to repair or recycle their used products and packaging	75%	82%	83%	75%	78%	79%	80%	76%	77%	100%	79%	789
I feel I can personally make a difference to minimising our impact on the environment	67%	72%	64%	62%	75%	71%	71%	67%	59%	100%	70%	698
The federal government should take urgent action on climate change regardless of the current economic and social conditions	64%	72%	74%	69%	73%	64%	70%	66%	53%	64%	68%	685
I always try to buy products that have minimal packaging or environmentally friendly packaging	59%	69%	65%	66%	61%	65%	64%	63%	60%	100%	64%	641
I make efforts to stay informed about the impacts of waste on the environment and human health	56%	61%	67%	61%	54%	57%	59%	58%	48%	40%	58%	583
Businesses should pay local councils to collect and recycle their products and packaging from households rather than ratepayers paying for it	55%	60%	51%	65%	60%	55%	59%	53%	60%	63%	57%	574



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Q3. To what extent do you personally agree or disagree with each of the statements below? (Sample size n=1001) Asked of all participants.

Knowledge of product stewardship concepts is low in general, with 'sustainable product design' the most familiar concept

Two thirds of those surveyed were unaware of the specific term 'product stewardship'. Sustainable product design is the only widely known term, where the majority have heard of it and two thirds have at least a little knowledge on the concept.



DSO



Q10. How well do you feel you understand each of the following terms in the context of manufacturing and waste disposal? Asked of all participants.

Q1. How well do you feel you understand the term product stewardship? (Sample size n=1001) Asked of all participants. Note: Product stewardship term data is taken from Q1 instead of Q10 to reduce bias.

*Total Heard of = Heard of, but know almost nothing + just a little + somewhat well + very well

Key demographic insight: there are some differences at a gender and regional level for awareness of product stewardship, but awareness of PS concepts in general are particularly low among those who are 50+ years

Those surveyed who were aged 50+ are significantly less likely to have heard of all product stewardship terms compared to younger age groups.

Column % Total Heard of *	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Sustainable product design	83%	84%	92%	89%	85%	78% ▼	85%	81%	69%	87%	83%	833
Product take back	67%	64%	74%	76% 🔺	67%	57% ▼	67%	63%	58%	50%	65%	650
Circular economy	61%	54%	62%	63%	62%	52% ▼	59%	56%	58%	37%	57%	576
Extended producer responsibility	60%	54%	66%	69% 🔺	56%	49% ▼	57%	58%	49%	50%	29%	566
Product stewardship	44% 🔺	31% ▼	42%	41%	44% 🔺	31% 🔻	42% 🔺	29% 🔻	29%	37%	37%	373

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Q10. How well do you feel you understand each of the following terms in the context of manufacturing and waste disposal? Asked of all participants.

Q1. How well do you feel you understand the term product stewardship? (Sample size n=1001) Asked of all participants. Note: Product stewardship term data is taken from Q1 instead of Q10 to reduce bias.

*Total Heard of = Heard of, but know almost nothing + just a little + somewhat well + very well



Product stewardship is most commonly linked to the concept of <u>overall</u> <u>management and ownership</u> rather than specific understanding and acknowledgement of the product lifecycle.

There is a strong association with sustainability via concepts such as minimising impact on the environment, environmental management, recycling and ethics.





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Q2. Please describe what you know about product stewardship in the space below. (Sample size n=373) Asked of those who have knowledge of product stewardship.

PRODUCT STEWARDSHIP RESPONSIBILITY EXPECTATIONS

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Those who were surveyed are leaning on their existing perceptions about who is normally responsible for products at different life stages, rather than thinking about the product over its whole lifecycle

Manufacturers and brand owners are seen to hold primary responsibility for Production stages. On the other hand, consumers themselves are seen to hold primary responsibility for Post-Consumption stages (along with waste management providers and local councils). The federal and state governments are less likely to be associated with primary responsibility, indicating that the general public is less focused on systematic solutions to minimising waste, circular economy and product stewardship.



S. Lifecycle stages (Use, Reuse, Retail) Post-Consumption (End of life)

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Q11. Who do you think is primarily responsible for managing the social and environment impact of a product at the manufacturing and production stage of its life? Asked of all participants. Q12. Who do you think is primarily responsible for managing the social and environment impact of a product at the end of its life after you've finished using it? Asked of all participants. (Sample size n=1001)

Key demographic insight: expectations of responsibility for products at the initial lifecycle stages differs between age groups, in particular older Australians

Those surveyed who were 50+ years are significantly more likely than younger age groups to think the manufacturer/producer is responsible for the social and environmental impact of a product at its initial stage of life, and significantly less likely to think that several others should be responsible.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Manufacturer / producer	60%	56%	58%	41% ▼	60%	63% 🔺	57%	58%	62%	50%	58%	580
Brand owner / the brand responsible for production	41%	44%	49%	41%	43%	41%	45%	40%	23%	64%	43%	427
Federal government	27%	24%	35%	30%	28%	19% ▼	27%	23%	14%	26%	25%	252
State government	22%	19%	29%	26%	21%	15% ▼	21%	18%	15%	26%	20%	202
Retailer / the company selling it to you	19%	18%	29% 🔺	20%	21%	14% ▼	20%	15%	21%	13%	19%	185
Distributor/ importer	16%	16%	20%	14%	16%	17%	17%	15%	17%	13%	16%	163
Consumer / individuals	17%	14%	14%	22%	19%	11% ▼	17%	12%	14%	13%	16%	155
Waste management / recycling services and companies	15%	13%	16%	16%	18%	10% ▼	15%	12%	17%	13%	14%	140
Local council	16%	12%	18%	18%	15%	10% ▼	15%	11%	12%	26%	14%	136
Repairer/second-hand dealer	7%	5%	7%	9%	7%	4%	7%	4%	12%	13%	6%	62
Other	0%	0%	0%	1%	0%	1%	0%	1%	0%	0%	0%	4
Don't know / Unsure	10%	11%	10%	14%	12%	8%	10%	11%	9%	0%	10%	104

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Q11. Who do you think is primarily responsible for managing the social and environment impact of a product at the manufacturing and production stage of its life? (Sample size n=1001) Asked of all participants. confidence level and above

Key demographic insight: expectations of responsibility for products at the end of its life differs between age groups, again in particular with older age groups

Of those surveyed, 50+ year olds are significantly less likely than younger age groups to think the brand, retailer, state or federal government is responsible for managing the social and environmental impact at the end of its life.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Consumer / individuals	45%	43%	47%	35%	47%	46%	45%	43%	31%	64%	44%	441
Waste management / recycling services and companies	37%	41%	44%	40%	36%	39%	38%	40%	48%	50%	39%	393
Local council	31%	29%	31%	28%	31%	30%	30%	32%	20%	26%	30%	299
Brand owner / the brand responsible for production	22%	19%	22%	27%	26%	15% ▼	23%	18%	15%	13%	21%	209
Manufacturer / producer	25% 🔺	16% ▼	15%	22%	25%	19%	22%	19%	17%	13%	21%	207
State government	22%	17%	28%	24%	25%	12% ▼	20%	18%	21%	26%	19%	193
Federal government	20%	16%	23%	22%	26% ▲	11% ▼	19%	16%	11%	26%	18%	180
Retailer / the company selling it to you	14%	12%	20%	16%	14%	9% ▼	13%	12%	11%	13%	13%	128
Repairer / second-hand dealer	12%	9%	16%	9%	11%	9%	11%	9%	6%	13%	10%	104
Don't know / Unsure	8%	12%	10%	14%	11%	8%	10%	10%	9%	0%	10%	99
Distributor / importer	8%	7%	9%	10%	10%	5%	9%	6%	3%	13%	8%	76
Other	0%	1%	0%	1%	0%	1%	1%	1%	0%	0%	1%	6

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Q12. Who do you think is primarily responsible for managing the social and environment impact of a product at the end of its life after you've finished using it? (Sample size n=1001) Asked of all participants.

There is division as to who should pay for costs associated with <u>end of life</u> (i.e., owner, user or government)

Manufacturers are expected to have a role in paying for the costs of recycling and disposal; but, subsequent to this, 26% of those surveyed indicated that consumers also need to absorb some cost. There is also a large portion that do not know who should pay or when it should be paid.





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Q24. Who, if anybody, do you believe should have to pay for the cost of recycling and disposal of products and materials when you have finished using them? Asked of all participants. Q25. And when do you believe this end of life disposal cost for products should be paid? Please indicate your preference from the following options. (Sample size n=1001) Asked of all participants.

Key demographic insight: older age groups (50+ years) are significantly less likely than younger age groups to think the responsibility for post-consumption management should lie with businesses, retailers, Federal or State Governments

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Manufacturers	39% 🔺	30% ▼	26%	32%	41%	35%	36%	32%	22%	37%	35%	346
Consumers (the general public)	28%	25%	14% 🔻	24%	28%	29%	26%	27%	14%	36%	26%	261
Local governments	24%	26%	35%	23%	24%	23%	26%	24%	17%	13%	25%	249
The federal government	22%	22%	31%	28%	26%	15% 🔻	23%	21%	20%	13%	22%	221
State governments	20%	22%	39% 🔺	25%	19%	16% 🔻	23%	20%	9%	13%	21%	211
Waste collection services	22%	19%	19%	20%	19%	23%	23%	16%	20%	13%	21%	208
Businesses	18%	16%	21%	25% 🔺	19%	11% 🔻	18%	15%	14%	13%	17%	168
Material producers	19%	14%	10%	16%	18%	17%	16%	15%	11%	37%	16%	160
Retailers	14%	13%	14%	18%	17%	10% 🔻	15%	10%	6%	37%	14%	134
Product designers	13%	12%	9%	14%	15%	11%	14%	11%	6%	13%	12%	125
Other	1%	1%	0%	1%	1%	2%	2%	1%	0%	0%	1%	14
Don't know / Unsure	14%	20%	11%	14%	20%	17%	15%	18%	31%	27%	17%	168

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Q24. Who, if anybody, do you believe should have to pay for the cost of recycling and disposal of products and materials when you have finished using them? (Sample size n=1001) Asked of all participants.

Key demographic insight: age again shows the biggest distinction on when costs should be paid

Younger age groups (18-24 years) are significantly more likely than older age groups to think that <u>end of life costs for products</u> should be paid for in personal tax and those 50+ years old are significantly less likely to want this covered by tax.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Pay for the cost upon disposal of products	26%	25%	19%	24%	22%	30%	25%	27%	32%	0%	26%	257
Pay for the cost up front included in purchase price	29%	22%	23%	19%	28%	27%	25%	25%	28%	14%	25%	252
Pay for the cost in council rates	12%	14%	8%	17%	14%	13%	15%	10%	14%	37%	13%	132
Others should pay for costs	11%	11%	19%	14%	11%	8%	11%	11%	9%	36%	11%	111
Pay for the cost in personal tax	5%	4%	13% 🔺	6%	5%	2% ▼	4%	7%	0%	13%	5%	47
Other	2%	2%	1%	1%	2%	3%	2%	3%	0%	0%	2%	19
Don't know	15%	22%	17%	18%	18%	18%	18%	19%	17%	0%	18%	183

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Q25. And when do you believe this end of life disposal cost for products should be paid? Please indicate your preference from the following options. (Sample size n=1001) Asked of all participants.





Decision making & priorities of consumers



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Energy rating, littering and recyclability are rated as most important when considering **purchasing products**

The majority of environmental issues prompted were considered either very or fairly important to consider when purchasing products. Issues that are rated most important are well established as normal considerations in everyday Australian life e.g., energy star ratings, littering and recycling campaigns. Historically, these issues have been pushed to the forefront of Australians environmental considerations via marketing, so have become important in product decisions. Waste and design considerations have not been as prominent, and single use plastic have become more salient in recent years. This is reflected in slightly lower levels of perceived 'importance' among consumers.

	_		Impo	rtance of en	vironme	ental issues wh	nen puro	chasing produ	icts	Total Important (fairly + very)	Total Not Important (not very + not at all)	Not sure/ Not applicable
Energy star rating	<mark>2%</mark> 3	<mark>%</mark>	11%		39%			43%		82%	6%	1%
Littering	4%	4%	11%		30%			47%		77%	8%	4%
Recyclability of product or packaging	4%	5%	16	%		38%		36	%	75%	9%	1%
Overall environmental impact of the product	4%	6%		19%		38%			32%	70%	10%	2%
Single use plastics	5%	6%		18%		33%		35	%	69%	11%	2%
How easy the product can be repaired	4%			21%		39%			29%	67%	10%	2%
Waste generated from the product	4%	6%		21%		40% 27%		27%		10%	3%	
Pollution created in making the product	6%	6	%	23%		34%		28%		62%	12%	4%
Renewable energy used to make the product	6%	8	3%	25%		3	5%		24%	59%	14%	3%
Waste star rating	5%	6	%	21%	34%				24%	58%	11%	10%
Ni	ot at all	import	ant	Not very importa	nt ■Ne	either important nor unim	nportant	Fairly important	Very important		-	



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Q7. How important or unimportant are each of the following issues to you when purchasing products? (Sample size n=1001) Asked of all participants.

Key demographic insight: females are significantly more likely than males to consider that recyclability, overall environmental impact and single use plastics are important when **purchasing products**

Column % Total Important (fairly + very)	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Energy star rating	80%	84%	79%	74%	82%	86%	81%	83%	82%	100%	82%	823
Littering	74%	80%	79%	75%	72%	81%	77%	78%	74%	100%	77%	772
Recyclability of product or packaging	70% 🔻	79% 🔺	74%	74%	75%	75%	75%	73%	71%	100%	75%	746
Overall environmental impact of the product	65% ▼	75% 🔺	80%	66%	71%	68%	71%	68%	74%	87%	70%	700
Single use plastics	64% ▼	73% 🔺	70%	66%	67%	71%	70%	65%	77%	87%	69%	689
How easy the product can be repaired	64%	70%	67%	64%	65%	70%	66%	68%	77%	87%	67%	673
Waste generated from the product	64%	70%	74%	65%	68%	65%	68%	65%	63%	87%	67%	669
Pollution created in making the product	59%	64%	72%	61%	61%	60%	62%	59%	66%	87%	62%	617
Renewable energy used to make the product	55%	62%	65%	62%	59%	55%	59%	57%	57%	64%	59%	586
Waste star rating	54%	62%	63%	58%	58%	57%	58%	59%	54%	50%	58%	584

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Q7. How important or unimportant are each of the following issues to you when purchasing products? (Sample size n=1001) Asked of all participants.

Around two in five of those surveyed consider durability and quality of product essential when purchasing products

Other production factors such as 'no harm to people', eliminating hazardous substances and minimising waste are more likely to be considered 'essential' over and above factors that relate to post-consumption such as information on end of life services and ability to be recycled or composted.

Quality of product		12%	40)%		43%		
Durability		13%		43%		38%		
No harm to people in the production, use or recycling of products and materials (e.g. fair work conditions, modern slavery statements)	4%	8%	23%		31%	319	%	3%
Eliminating hazardous substances (e.g. checking chemicals, avoiding certain known hazardous substances)	4%	8%	24%		32%	2	9%	
Minimising waste	4%	7%	24%		36%	2	7%	4%
Repairability	<mark>3%</mark>	8%	28%		36%		23%	
Extended or enhanced warranty on products	6%	8%	25%		37%		22%	
Sustainable packaging (e.g. packaging that is recyclable)	5%	8%	25%		38%		21%	3%
Reducing carbon emissions	6%	13%	27%	0	30%		20%	
Information on recycling or access to free recycling services	6%	11%	28%		33%		20%	3%
Whether it is recyclable or compostable	5%	9%	28%		37%		19%	3%
Using materials or resources (energy and water) efficiently to manufacture products	6%	10%	29%		34%		18%	
Use of renewable materials or recycled content in products	6%	11%	31%		34%		17%	3%
	Not at a	all important	Not very important	nt ■ Fairly in	portant Very importar	t Essei	ntial No	ot Sure

Consumers priorities when purchasing products

Fairly important

Not very important

Production (Materials, Design, Manuf acturing) Lif ecy cle Consumption stages (Use, Reuse, Retail) psos Post-Consumption (End of life)

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Q8. In general, what level of priority do you give to each of the following when purchasing products? (Sample size n=1001) As ked of all participants. Results under 3% not shown.

There are no differences in demographic profile among those surveyed who think that these considerations are 'essential' when **purchasing products**

Column % Essential	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Quality of product	41%	46%	42%	37%	41%	48%	42%	46%	34%	73%	43%	433
Durability	36%	40%	36%	35%	38%	39%	37%	39%	42%	73%	38%	379
No harm to people in the production, use or recycling of products and materials (e.g. fair work conditions, modern slavery statements)	26%	36%	36%	32%	27%	32%	30%	32%	37%	13%	31%	310
Eliminating hazardous substances (e.g. checking chemicals, avoiding certain known hazardous substances)	25%	33%	29%	27%	24%	34%	29%	29%	28%	27%	29%	293
Minimising waste	24%	29%	23%	24%	27%	29%	27%	26%	20%	36%	27%	269
Repairability	21%	25%	20%	24%	19%	25%	21%	26%	26%	60%	23%	228
Extended or enhanced warranty on products	21%	23%	22%	25%	19%	23%	21%	24%	20%	13%	22%	221
Sustainable packaging (e.g. packaging that is recyclable)	19%	24%	21%	24%	17%	23%	21%	22%	26%	36%	21%	214
Reducing carbon emissions	18%	22%	21%	24%	17%	20%	20%	21%	17%	36%	20%	200
Information on recycling or access to free recycling services	19%	20%	16%	20%	19%	21%	19%	20%	17%	36%	20%	197
Whether it is recyclable or compostable	15%	23%	16%	21%	15%	21%	19%	20%	20%	13%	19%	193
Using materials or resources (energy and water) efficiently to manufacture products	17%	18%	21%	19%	15%	18%	17%	19%	17%	13%	18%	177
Use of renewable materials or recycled content in products	16%	17%	13%	22%	15%	16%	15%	19%	17%	13%	17%	166



▲ ▼ significantly higher or low er than total at 95% confidence level and above



Q8. In general, what level of priority do you give to each of the following when purchasing products? (Sample size n=1001) As ked of all participants.

Durability/longevity is the top consideration for those surveyed at the Production stage of the product lifecycle

Other production factors such as consideration of end of life recyclability, making repair and upgrades more realistic, limiting the amount of hazardous materials and using more recycled content are all considered important by consumers. Least priority is placed on shared services and provision of consumer information.



stages

(Use, Reuse, Retail)

Post-Consumption (End of life) psos

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Q9. From the list below, please select the top 3 factors you think are most important for companies to consider when designing products? (Sample size n=1001) Asked of all participants.

Consumer priorities for the production design are much the same regardless of demographic profile

Column % Rank 1	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Making products last longer / more durable	39%	30%	27%	24%	40%	38%	33%	39%	26%	50%	35%	348
Limiting the amount of hazardous materials or ingredients products contain	11%	16%	19%	15%	11%	13%	14%	11%	23%	14%	13%	135
Using more recycled materials to manufacture products and its packaging	8%	14%	15%	14%	11%	9%	12%	11%	8%	23%	11%	113
Making products and packaging from materials that can be easily recycled	8%	11%	8%	14%	5%	11%	11%	7%	11%	13%	10%	95
Making it easier / more affordable for customers to repair or upgrade products	10%	9%	11%	10%	8%	9%	8%	11%	6%	0%	9%	92
Making products so they can be returned and reused	7%	7%	7%	6%	9%	6%	7%	6%	3%	0%	7%	69
Retailers providing information to customers about how to use and dispose of the product responsibly	6%	4%	4%	4%	6%	5%	6%	4%	3%	0%	5%	51
Ensuring customers have access to free collection / drop off services to recycle their products and packaging	3%	5%	3%	6%	3%	4%	4%	4%	12%	0%	4%	43

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▲ ▼ significantly higher or low er than total at 95% confidence level and above

Q9. From the list below, please select the top 3 factors you think are most important for companies to consider when designing products? (Sample size n=1001) Asked of all participants.

PRODUCT STEWARDSHIP CONSIDERATION IN BEHAVIOUR

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The consumer landscape can be broadly classified based upon the degree of behavioural engagement and level of motivation to act



Attitudinal Dimension: Q3.4 Strongly or somewhat agree that 'I feel I can personally make a difference to minimizing our impact on the environment.' Asked of all participants. Q7.1 How important or unimportant are each of the following issues to you when purchasing products? 'Overall environmental impact of the product' is 'Very Important'. Asked of all participants. Q17 You said that you have heard of but not used the following initiative. How likely would you say you are to use it in the future? Asked of those who have heard of but have not used any initiative.

Engagement Dimension: #of data points from a maximum of 41: Q10. How well do you feel you understand each of the following terms in the context of manufacturing and waste disposal? Rate 'Understand Very Well'. Asked of all participants. Q13. Please indicate whether you have heard of and/or used each of the following product stewardship initiatives. 'Engage with'. Asked of all participants. Q21. Please indicate whether you personally have searched for information on the following topics for a product you are planning to purchased. Asked of all participants.



Approximately half of those surveyed demonstrated limited intentional engagement with product stewardship concepts and initiatives

When combining the two lower segments, 52% of those surveyed are not engaging in product stewardship and circular economy practices to any great degree and there is significant scope to increase purposeful behaviour. These segments are not attitudinally engaged as much as the other segments. Approximately one in ten consumers (12%) are highly engaged and attitudinally aligned 'Enthusiasts'. However, there is still scope for this segment to further increase their behaviour and understanding.



Consumer Segments: Attitudinal + Level of Engagement and Behaviour

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Product durability and longevity are key drivers even for those not actively seeking to increase responsible consumption

Column %	Not Engaged At All	Default Participants / Starting to Engage	Ethically Motivated	Supportive Participants	Enthusiasts
Demographic profile factors	Skewed towards VIC (38%) and NSW (31%)		Demogra	phics largely similar across all groups	
Information seeking	 41% would not know where they would go for more information Likely sources are Council website (27%) Brand website (20%) Key information would be 'how long a product will last for' (57%), 'how to make a product use its full life' (47%) 'how to repair myself (46%) 	 Likely sources of information Council website (36%) Brand website (29%) Manufacturers website (26%) Key information would be 'how long a product will last for' (54%) 'how to make a product use its full life' (48%) 	 Likely sources include Council website (46%) Brand/Manufacturers website (both 40%) Also highlylikely to check with Retailer (38%) 20% would like to receive information from the Product Stewardship Centre of Excellence Key information would be 'how to make a product use its full life' (59%) other durability/longevity information 	 Likely sources include Council website (39%) Brand/Manufacturers website (both 37%) Also highlylikely to check with a Government website (36%) 21% would like to receive information from the Product Stewardship Centre of Excellence Key information would be 'how long a product will last for' (56%) 'how to make a product use its full life' (49%) 	 Will use many sources starting with Council website (55%) Brand websites (52%) 32% would like to receive information from the Product Stewardship Centre of Excellence Key information would be 'how to make a product use its full life' (47%) 'where a product can be recycled' 402%). Also highly interested in information on 'carbon footprint of a product' (40%).
Engagement & behaviour	 Top 3 Essential considerations: Quality of product (31%) Durability (25%) Minimising waste (20%) Other behaviours: less likely to recycle, give away or donate to charity 	 Top 3 Essential considerations: Quality of product (40%) Durability (32%) No harm to people (25%) Other behaviours: less likely to engage in non-household recycling Key initiatives: Container Deposit Schemes (45%) Plus some use of Cartridges 4 Planet Ark (14%) 	 Top 3 Essential considerations: Quality of product (63%) Durability (60%) Eliminating hazardous substances (59%) Key initiatives: Container Deposit Schemes (42%) ALDI battery recycling (14%) 	 Top 3 Essential considerations: Quality of product (43%) Durability (37%) No harm to people / Eliminating hazardous substances (both 28%) Other behaviours; more likely to recycle outside household Key initiatives: Container Deposit Schemes (57%) Officeworks recycling (50%) Cartridges 4 Planet Ark (39%) plus niche engagement in initiatives such as IKEA buy-back (20%) 	 Top 3 Essential considerations: Durability (60%) No harm to people (58%) Eliminating hazardous substances (58%) Other behaviour: actively recycling elsewhere, reselling, donating or giving to others Key initiatives: Container Deposit Schemes (63%) Officeworks recycling (49%) Cartridges 4 Planet Ark (47%) Battery World recycling (41%) plus niche engagement in initiatives such a Simply Cups (29%) and Flurocycle (19%)

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Q. Ref: State and Demographic banner, Q8, Q22, Q26, Q23, Q13 Sample size n=1,001 Segment n= from n=78 to 394. Asked of all participants.

Blue test Red text significantly higher or low er than total at 95% confidence level and above

When purchasing products, durability is most often considered in the decision making process

Having a product last longer is naturally the easiest way of reducing waste impact and reducing the need to buy more replacement products (i.e., it has dual financial and environmental benefits). With this in mind, it should be noted that this conscious consideration of durability is likely to be largely motivated by financial aspects, with reducing impacts on human health and the environment being a secondary motivation or by-product.

There is active and conscious consideration of general impacts and avoidance of hazardous materials. There is less conscious consideration of other material incorporation, production carbon footprints and active consideration of retail source.

Behaviour when p	urchasing	products				Total Regularly (very often + nearly always)	Total Rarely (not very often + hardly ever)	Not applicable to me / my household
Consciusly purchase products that are designed to be more durable / last longer	<mark>4%</mark> 4% 7%	27%	35%	6	21%	56%	11%	1%
Consciusly purchase products, that are better for the environment and humans in general	6% 7%	13%	33%	27%	12%	39%	21%	1%
Consciusly purchase products that do not contain hazardous substances (e.g. check for certain chemicals or warnings related to ingredients)	7% 8%	15%	28%	24%	15%	39%	23%	2%
Consciusly avoid purchasing products that have non-recyclable packaging	10% 9%	6 17%	31%	22%	10%	32%	26%	2%
Consciusly purchase products made from recycled materials	7% 10%	17%	34%	23%	8%	31%	26%	1%
Consciusly purchase products with a small or reduced carbon footprint that are more energy or water efficient	9% 10%	6 15%	34%	21%	9%	30%	25%	2%
Consciusly purchase products that consist of renewable materials (e.g. bio-based)	8% 9%	17%	36%	21%	8%	28%	26%	2%
Consciusly choose to purchase second hand products rather than buying new ones (e.g. clothing, furniture, appliances)	12%	12% 16%	31%	18%	8%	26%	28%	2%
Consciusly choose one retailer to purchase products or services over another because they actively try to reduce environmental or human health impacts	10% 11	% 20%	32%	17%	% <mark>8%</mark>	25%	31%	2%

Never Hardlv ever Not very often

Sometimes/ occasionally

Nearly always Verv often

Production (Materials, Design, Manuf acturing) Lif ecy cle Consumption stades (Use, Reuse, Retail) pso Post-Consumption (End of life)



Q4. How often, if at all, do you do each of the following when purchasing products? (Sample size n=1001) Asked of all participants.

Key demographic insight: females are significantly more likely than males to make conscious purchase decisions regularly about products being – better for the environment, made from recycled materials and avoiding non recycled packaging

Column % Total Regularly (very often + nearly always)	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Purchase products that are designed to be more durable / last longer	53%	60%	52%	50%	54%	61%	56%	57%	56%	74%	56%	564
Purchase products, that are better for the environment and humans in general	32% ▼	46% 🔺	43%	40%	36%	40%	39%	41%	37%	37%	39%	393
Purchase products that do not contain hazardous substances (e.g. Check for certain chemicals or warnings related to ingredients)	34%	44%	38%	39%	33%	43%	38%	40%	51%	37%	39%	392
Avoid purchasing products that have non-recyclable packaging	26% ▼	37% 🔺	30%	32%	28%	34%	32%	33%	20%	14%	32%	318
Purchase products made from recycled materials	25%▼	37% 🔺	32%	31%	29%	33%	31%	33%	31%	0%	31%	314
Purchase products with a small or reduced carbon footprint that are more energy or water efficient	27%	33%	25%	31%	30%	31%	30%	31%	28%	23%	30%	300
Purchase products that consist of renewable materials (e.g. Bio-based)	25%	31%	29%	30%	28%	28%	28%	29%	26%	14%	28%	285
Choose to purchase second hand products rather than buying new ones (e.g. Clothing, furniture, appliances)	21%	31%	35%	33%	25%	22%	25%	28%	20%	37%	26%	262
Choose one retailer to purchase products or services over another because they actively try to reduce environmental or human health impacts	21%	28%	27%	31%	25%	21%	26%	23%	14%	14%	25%	247

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Q4. How often, if at all, do you do each of the following when purchasing products? (Sample size n=1001) Asked of all participants.



Those surveyed reported high rates of reuse of packaging and repair of products, rather than throwing them away

Reuse of packaging is more common than repair of products.

There is potential for consumers to do more, especially repairing items, with only half doing it 'often'. This may be due either to the nature of the product, or the lack of knowledge or expertise on how to repair it.



Lifecycle stages (Use, Reuse, Retail) Post-Consumption (End of life)

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Q5. And how often, if at all, do you do each of the following when using products? (Sample size n=1001) Asked of all participants.

Key demographic insight: females are significantly more likely than males to reuse disposable items regularly

Column % Total Regularly (very often + nearly always)	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Reuse disposable items like takeaway containers, plastic / paper bags, glass jars	59% ▼	73% 🔺	62%	56%	66%	71%	65%	68%	65%	64%	66%	664
Repair broken or damaged items rather than disposing of them	46%	49%	44%	38%	47%	53%	46%	50%	49%	73%	47%	476

Q5. And how often, if at all, do you do each of the following when using products? (Sample size n=1001) Asked of all participants.

Those who were surveyed said they are more likely to utilise household recycling services, donate or pass products onto others than seek out-of-home end of life disposal services

There is the least engagement with selling products to others (especially in contrast to donating or giving away) or post-back recycling services. Ease and convenience will be key underlying factors related to the focus on using household based recycling and simply passing on a product.



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Q6. How have you disposed of your used products and packaging in the past year? (Sample size n=1001) Asked of all participants.



Key demographic insight: Younger age groups are significantly more likely to use different avenues to dispose of their products, including on-selling

There are a number of key significant differences in disposal behaviour noted across gender, age and location. Females are more active in donating or passing on goods to others, older age groups are more traditional around their recycling behaviour and those in inner regional Australia are more active with their local recovery centre / transfer station and landfill tip.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Put in household recycling collection	72%	77%	66%	63% 🔻	71%	84% 🔺	73%	79%	77%	50%	75%	751
Put in household general waste collection	45% 🔻	54% 🔺	62% 🔺	53%	49%	46%	49%	54%	43%	13%	50%	501
Donated to a charity	40% 🔻	59% 🔺	53%	45%	50%	51%	48%	56% 🔺	28%	0%	50%	500
Given away to friend or family	35% 🔻	49% 🔺	55% 🔺	39%	44%	40%	41%	47%	31%	0%	42%	425
Put out on kerbside for council to collect (large or bulky items)	39%	39%	26% 🔻	37%	43%	41%	44% 🔺	30% ▼	23%	37%	39%	392
Recycled at a council transfer station / resource recovery centre	34%	32%	23%	24% 🔻	33%	39% 🔺	29% ▼	39% 🔺	28%	73%	33%	328
Stored at home	28%	35%	50% 🔺	38%	32%	23% 🔻	31%	33%	26%	40%	31%	314
Recycled at a retail outlet or supermarket	28%	33%	27%	27%	29%	34%	32%	30%	20%	27%	31%	309
Sold or donated online	24%	31%	49% 🔺	36%	31%	17% 🔻	28%	31%	12%	0%	28%	279
Taken to landfill at tip or transfer station	19%	18%	25%	19%	19%	17%	14% 🔻	28% 🔺	25%	13%	19%	186
Sold in person (e.g. at markets)	11%	10%	19% 🔺	13%	8%	9%	10%	13%	5%	0%	11%	107
Posted back to be recycled	7%	7%	12%	7%	9%	5%	9%	6%	0%	0%	7%	73
Dumped in bush or roadside	2%	2%	3%	5% 🔺	3%	0% ▼	3%	1%	3%	0%	2%	20
Not applicable to me	2%	1%	1%	3%	2%	1%	2%	2%	0%	0%	2%	16
Other	1%	1%	0%	1%	2%	1%	1%	1%	0%	0%	1%	12
Don't know / Unsure	1%	1%	2%	2%	1%	1%	1%	2%	0%	0%	1%	11

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Q6. How have you disposed of your used products and packaging in the past year? (Sample size n=1001) Asked of all participants.



FUTURE OPPORTUNITIES

Categorised by product class



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Financial incentives, better design for reuse and expansion of household recycling services would increase participation broadly across the population

These hold broad appeal for both those already engaged (to increase behaviour) as well as those who have limited to no engagement in product stewardship currently.



Production (Materials, Design, Manuf acturing)

Consumption

(Use, Reuse, Retail)

Post-Consumption

(End of life)

psos

Lif ecy cle

stades

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Q18. How would the following factors influence your participation in product stewardship initiatives? (Sample size n=1001). Column base of those with no to limited engagement n=526. Asked of all participants.

Key demographic insight: Older age groups and those who are regionally based are going to be particularly influenced by increased ability to expand household recycling services already available

Column % More likely to participate	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Receiving a financial benefit (e.g.10c for a can)	67%	68%	72%	64%	67%	68%	65%	73%	63%	100%	67%	675
Product is designed to be reused (e.g. refillable containers)	61%	68%	69%	57%	61%	69%	63%	68%	63%	87%	65%	649
Option for products to be added to the acceptable items allowed in the recycling bin to minimise waste landfill	58% ▼	69% 🔺	61%	56%	58%	71% 🔺	60% ▼	71% 🔺	57%	74%	64%	640
Opportunities for products/items to be repaired	60%	64%	61%	55%	60%	67%	60%	67%	54%	74%	62%	621
Reduction in cost of disposal	56%	63%	63%	56%	59%	60%	55% ▼	69% 🔺	60%	60%	59%	594
Increasing options for take-back of products that are not currently available	52%	60%	62%	51%	50%	60%	54%	61%	46%	26%	56%	561
Being informed of the amount contributed upfront in the purchase price for initiatives rather than paying for it on disposal	40%	45%	51%	43%	41%	41%	40%	47%	40%	74%	42%	424

48 – © Ipsos | UTS Institute for Sustainable Futures | Product Stewardship Benefits Assessment | General Population 2022 Report Q18. How would the following factors influence your participation in product stewardship initiatives? (Sample size n=1001) As ked of all participants.



INFORMATION PREFERENCES

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Most of those who were surveyed have not looked for information about leasing or sharing, but over two thirds have looked at how to recycle, repair or responsibly dispose of a product

There is an opportunity here to make it easier for the public to find this type of information when they do actively information seek, as only half found it relatively easy to find and a quarter found it difficult. This finding does not change across information types.

Recycling a product	27%	68%		6%
Repairing a product	26%	67%		6%
Disposing a product responsibly	30%	63%		7%
Leasing a product		74%	19%	7%
Sharing a product (e.g. renting out a product you own in a product-sharing app / website)		76%	15%	8%

Searched for information on...

■No ■Yes ■Don'tknow/Unsure



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Q19. Have you ever tried to find information on how to do any of the following? (Sample size n=1001) Asked of all participants. Q20. Howeasy or difficult would you say it was to find that information? (Sample size n=813) Asked of those who tried to find information on any statement.



Key demographic insight: younger age groups are more likely to have tried to find information on repair, leasing and sharing a product

Column % Yes	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Recycling a product	65%	70%	72%	63%	69%	67%	68%	69%	51%	74%	68%	677
Repairing a product	68\%	67%	80% 🔺	59%	68%	67%	66%	71%	63%	87%	67%	674
Disposing a product responsibly	62%	65%	63%	62%	62%	65%	64%	64%	39% ▼	50%	63%	634
Leasing a product	20%	18%	32% 🔺	26%	21%	11% 🔻	19%	20%	11%	23%	19%	188
Sharing a product (e.g. renting out a product you own in a product-sharing app / website)	15%	16%	37% 🔺	21%	17%	6% ▼	17%	13%	3%	0%	15%	151

Key demographic insight: older age groups are least likely to find information searching 'easy'

Older age groups (50+ years) are significantly less likely than younger age groups to find it easy to find information on recycling, repairing, disposing of, leasing or sharing a product. This is consistent with well known generational differences in technology capability.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Total Easy (somewhat + very)	45%	48%	56%	47%	53%	40% ▼	47%	45%	32%	100%	47%	378
Very easy	10%	13%	14%	11%	15%	9%	12%	11%	5%	15%	12%	95
Somewhat easy	35%	35%	41%	36%	38%	31%	35%	34%	27%	85%	35%	283
Neither easy nor difficult	28%	27%	23%	30%	24%	30%	28%	27%	42%	0%	28%	226
Somewhat difficult	21%	19%	17%	15%	18%	24%	19%	21%	22%	0%	20%	163
Very difficult	4%	3%	1%	6%	3%	4%	3%	4%	4%	0%	3%	28
Total Difficult (somewhat + very)	24%	22%	18%	21%	21%	28%	23%	25%	27%	0%	23%	191
Don't know	2%	2%	3%	2%	2%	2%	2%	2%	0%	0%	2%	18

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Q20. How easy or difficult would you say it was to find that information? (Sample size n=813) Asked of those who tried to find information on any statement.

In contrast to broad topics around recycling and repair, there is less information seeking on very specific topics that could be considered around product stewardship

End of life disposal is of more interest to consumers. Currently only about one in five of those surveyed has actively searched for 'impact' indicator information.



Searched for information about purchased or planned to purchase product

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Q21. Please indicate whether you personally have searched for information on the following topics for a product you are planning to purchase or have purchased. (Sample size n=1001) Asked of all participants.



Key demographic insight: there are some significant differences across gender, age and region for searching for information, but differences in age are most salient once again

Older age groups (50+ years) are significantly more likely than younger age groups to not have searched for any information about impacts of purchased products, while those under 34 years are significantly more likely to. This again demonstrates the younger population's higher interest in environmental and human impacts.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
None of these	46%	41%	27% ▼	28% ▼	47%	52% 🔺	41%	46%	60%	26%	43%	437
End of life disposal for products or materials options	32% ▼	40% 🔺	43%	48% 🔺	30%	34%	38%	34%	26%	37%	36%	362
Environmental impacts of the supply chain for products you use of purchase	22%	20%	42% 🔺	28% 🔺	22%	11% ▼	23% 🔺	16%	6%	36%	21%	204
Social impacts of the supply chain for products you use or purchase	18%	18%	30% 🔺	28% 🔺	17%	11% ▼	19%	16%	17%	13%	18%	179
Don't know	8%	8%	4%	9%	9%	8%	7%	9%	3%	0%	8%	78
Other	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	3

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Q21. Please indicate whether you personally have searched for information on the following topics for a product you are planning to purchase or have purchased. (Sample size n=1001) Asked of all participants, confidence level and above

As would be expected, those who were surveyed were more likely to seek information on Council websites, as they strongly link recycling and waste to local councils

Given the lower conscious awareness of concepts such as product stewardship and circular economy, those surveyed leant on historical knowledge of broader recycling and sustainability topics (and hence traditional sources of information for these). There is opportunity here to promote the profile of product stewardship through avenues that are already familiar to Australians for similar information.



Where to go for more information



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Q22. If you were interested in learning more about how to responsibly use, repair, donate, recycle or dispose of a product, where would you want to go for more information? (Sample size n=1001) Asked of all participants.

Key demographic insight: older age groups will revert to Council as a source of information while younger age groups would seek information in a retail context

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Council website	36%	41%	25% ▼	33%	35%	47% ▲	38%	40%	52%	13%	39%	389
Brand website	34%	33%	42%	35%	36%	29%	34%	34%	17%	37%	34%	336
Manufacturer's website	37% 🔺	27% 🔻	31%	30%	32%	33%	32%	32%	23%	14%	32%	318
Government website	33%	26%	28%	31%	33%	28%	31%	29%	23%	13%	30%	298
Product packaging	25%	27%	45% 🔺	27%	29%	19% ▼	27%	27%	14%	14%	26%	262
Retailer website	23%	25%	35% 🔺	30%	24%	18% ▼	25%	21%	25%	0%	24%	239
To a retailer (when purchasing products)	16%	16%	22%	14%	17%	15%	16%	17%	17%	23%	16%	160
Product Stewardship Centre of Excellence website	14%	12%	16%	15%	15%	10%	14%	11%	6%	23%	13%	127
Other	6%	6%	2%	8%	7%	6%	7%	5%	3%	36% 🔺	6%	60
Don't know	13%	14%	10%	13%	11%	16%	13%	13%	23%	13%	13%	134

56 - © Ipsos | UTS Institute for Sustainable Futures | Product Stewardship Benefits Assessment | General Population 2022 Report Q22. If you were interested in learning more about how to responsibly use, repair, donate, recycle or dispose of a product, where would you want to go for more information? (Sample size n=1001)

Asked of all participants.

▲ ▼ significantly higher or low er than total at 95% confidence level and above

Longevity and extension of life of a product are of interest to consumers as a consistent theme

As noted in other areas, durability and ability to extend the life of a product is of interest to consumers when it comes to information searching behaviour.



Top 3 most useful information

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Q23. Please rank what you think would be the most useful information to receive about product stewardship initiatives in order from 1, most important to 8, least important. (Sample size n=1001) Asked of all participants.



Key demographic insight: generational differences continue to be seen for information preferences, with the younger population more engaged with environmental topics

Younger age groups (18-24 years) are significantly more likely to rank the 'carbon footprint of a product' in their top 3 most useful types of information to receive about PS initiatives. Older age groups (50+ years) are significantly less likely to rank 'what happens when a product is recycled' in their top 3.

Column % Top 3	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
How long a product will last for	57%	49%	52%	41%	55%	56%	52%	56%	42%	37%	53%	527
How can I make a product last its full life (user instructions)	45%	53%	47%	50%	53%	47%	50%	48%	42%	50%	49%	492
How can I repair a product myself	46%	41%	32%	41%	48%	45%	43%	43%	43%	60%	43%	434
Where can a product be recycled or where to find the nearest recycling point	32%	38%	39%	37%	33%	33%	36%	33%	31%	0%	35%	348
Who should I contact to repair a product	34%	35%	28%	36%	33%	36%	34%	34%	37%	47%	34%	343
What proportion of material used in a product is from recycled materials	20%	25%	33%	29%	20%	18%	23%	21%	26%	14%	23%	226
The carbon footprint of a product	21%	23%	37% ↑	19%	22%	20%	22%	23%	17%	13%	22%	222
What happens when a product is recycled	18%	20%	21%	28%	24%	12% ↓	20%	19%	18%	0%	19%	192
None of these	9%	5%	3%	6%	4%	11%	6%	8%	14%	26%	7%	73
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1

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Again, those who were surveyed received information from the places they are ingrained to go to for similar topics such as the manufacturer, waste services and Councils

Manufacturers is the most preferred channel for receiving information, closely followed by waste collectors and recyclers, local and state governments. A reasonable proportion of those surveyed did not know who they would prefer to receive information from.



Who to receive information from

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Q26. Who, if anybody, would you like to receive information from about the impacts of products, packaging and materials on the environment or human health? (Sample size n=1001) Asked of all participants.

Key demographic insight: generational differences continue to be seen in preference of information source

Older age groups (50+ years) are significantly less likely than younger age groups to want information about the impacts of products, while 18-24 year olds are significantly more likely to.

Column %	Male	Female	18 – 24 years	25 – 34 years	35 – 49 years	50+ years	Major Cities Australia	Inner Region Australia	Outer Region Australia	Remote Australia	Total	Sample size
Manufacturers	30%	26%	22%	24%	31%	30%	27%	31%	23%	37%	28%	280
Waste collectors and recyclers	26%	25%	25%	26%	25%	26%	25%	27%	25%	23%	26%	255
Local governments	25%	25%	26%	22%	25%	27%	24%	28%	20%	14%	25%	254
Everyone	23%	27%	39% 🔺	21%	24%	22%	23%	27%	28%	37%	25%	247
State governments	26%	22%	28%	21%	25%	23%	24%	24%	23%	14%	24%	241
The federal government	25%	20%	31%	21%	26%	18%	21%	23%	25%	14%	22%	221
Retailers	19%	21%	36% 🔺	21%	20%	16% 🔻	20%	20%	25%	14%	20%	202
Businesses(in general)	17%	17%	27% 🔺	20%	19%	12% 🔻	17%	19%	11%	0%	17%	169
Product Stewardship Centre of Excellence	17%	17%	16%	17%	19%	16%	17%	17%	14%	23%	17%	168
Material producers	16%	16%	20%	16%	18%	14%	16%	17%	20%	0%	16%	161
Product designers	16%	16%	19%	14%	17%	16%	16%	17%	11%	14%	16%	160
Consumers (the general public)	13%	13%	18%	17%	13%	11%	14%	12%	8%	13%	13%	133
Other	2%	1%	0%	0%	1%	3% 🔺	2%	0%	3%	0%	1%	15
Don't know	18%	18%	10%	20%	21%	18%	17%	19%	23%	26%	18%	182

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Q26. Who, if anybody, would you like to receive information from about the impacts of products, packaging and materials on the environment or human health? (Sample size n=1001) Asked of all participants.

significantly higher or



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