

Product stewardship benefits assessment

General population report

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KEY INSIGHTS

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.

KEY INSIGHTS

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 AVAILABLE

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 sought. 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.

KEY INSIGHTS

UNFAMILIARITY 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

KEY INSIGHTS

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)*

KEY INSIGHTS

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

1

RESEARCH BACKGROUND AND OBJECTIVES

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.

| | | |
|----------------------------------------------------------------|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary Objective Assess awareness and understanding | Key focus area | |
| | Awareness and understanding | What is the <i>understanding/awareness</i> 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? Who do members of general population consider to be responsible for the lifecycle impact of products? How do we test awareness of product stewardship schemes? Knowledge about product stewardship schemes for different products, accessibility 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? |
| | Additional focus areas | |
| | Engagement | How effective are product stewardship schemes at engaging with community? Use examples of schemes to understand how familiar/engaged they are with a particular scheme? Where do consumers gather information? |
| | Expectations | What are expectations around repair, reuse, take-back? 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 | No regional Quotas | | | 1000 |
| Regional | 113 | 62 | 102 | 16 | 22 | | | | |
| Total | 320 | 255 | 199 | 73 | 105 | 22 | 9 | 17 | |

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 | | |
|-----------------------------------|-----------------------------------------------------------------------------------|-----|--|
| Gender | Male | 483 | |
| | Female | 518 | |
| Age | 18 – 24 years | 117 | |
| | 25 – 34 years | 176 | |
| | 35 – 49 years | 263 | |
| | 50+ years | 445 | |
| | | | |
| State | New South Wales | 319 | |
| | Victoria | 258 | |
| | Queensland | 196 | |
| | South Australia | 75 | |
| | West Australia | 106 | |
| | Tasmania | 22 | |
| | Northern Territory | 8 | |
| | Australian Capital Territory | 17 | |
| | | | |
| | | | |
| Regions | Inner Region Australia | 314 | |
| | Major Cities of Australia | 646 | |
| | Outer Region Australia | 35 | |
| | Remote Australia | 6 | |
| | | | |
| Highest level of education | Post graduate | 124 | |
| | Currently studying or completed Bachelor / Honours degree / Undergraduate diploma | 366 | |
| | Completed some or all of TAFE/College certificate | 275 | |
| | Now studying or completed HSC / Year 12 / 6th Form | 116 | |
| | Completed some or all of Year 10/4th Form or lower | 120 | |

| | Sample size | | |
|-----------------------------------------------------------------------------|---------------------------------------------|-------|--|
| Current employment status | Employed* | 590 | |
| | Not working* | 98 | |
| | Student | 38 | |
| | Homemaker* | 50 | |
| | Retired | 225 | |
| Industry | Unemployed | 411 | |
| | None of the above | 290 | |
| | Business Professional Services White Collar | 108 | |
| | Industry Blue Collar | 38 | |
| | Healthcare/Pharmaceuticals | 46 | |
| | Consumer goods/Retail | 26 | |
| | Government/Politics/Education | 50 | |
| | Front of house Blue Collar | 32 | |
| | | | |
| | | | |
| Annual personal gross income before tax | Up to \$50,000 | 457 | |
| | \$50,000-\$79,999 | 205 | |
| | \$80,000-\$124,999 | 177 | |
| | \$125,000 or more | 87 | |
| | Dont know/No Answer | 75 | |
| Identify as a person of Aboriginal or Torres Strait Islander descent | Yes - ATSI | 25 | |
| | No | 963 | |
| Language other than English | Prefer not to say | 13 | |
| | Yes | 89 | |
| | No | 903 | |
| | Prefer not to say | 9 | |
| Total | | 1,001 | |

PRODUCT LIFECYCLE FRAMEWORK

2

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.

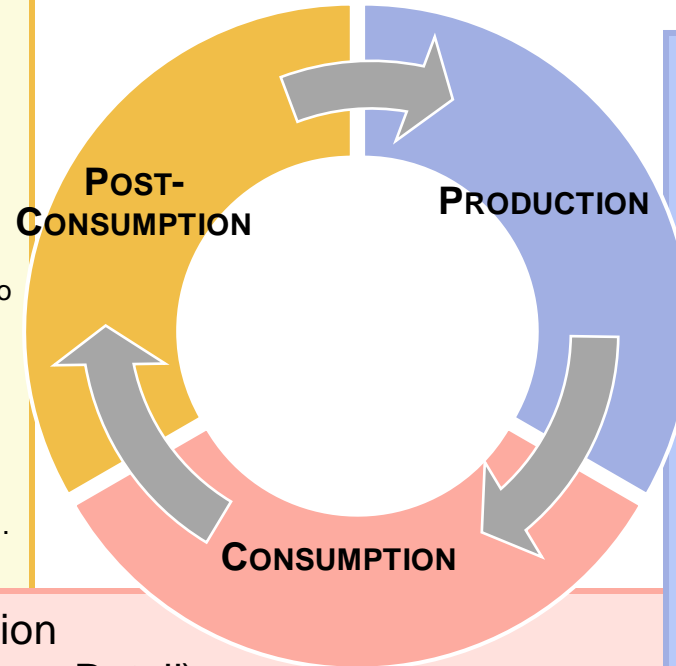
| Product lifecycle stage | Activities of each lifecycle stage | Actions |
|-------------------------|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Production</i> | Materials, design, manufacturing | <ul style="list-style-type: none"> • 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 |
| <i>Consumption</i> | Retail, use and reuse | <ul style="list-style-type: none"> • Consumer information promoting better product use • Innovative business models, circular business models • Promoting high quality products • Product trade-in and/or repair services |
| <i>Post-consumption</i> | Logistics and collection | <ul style="list-style-type: none"> • Providing take-back services, improving access and convenience • Better logistics solutions • Material recovery (recycling and reprocessing) • New end-markets |
| | End of life | |

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 post-consumption 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](#)).



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, slide 23](#)).

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](#)).

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 reparability 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](#)).

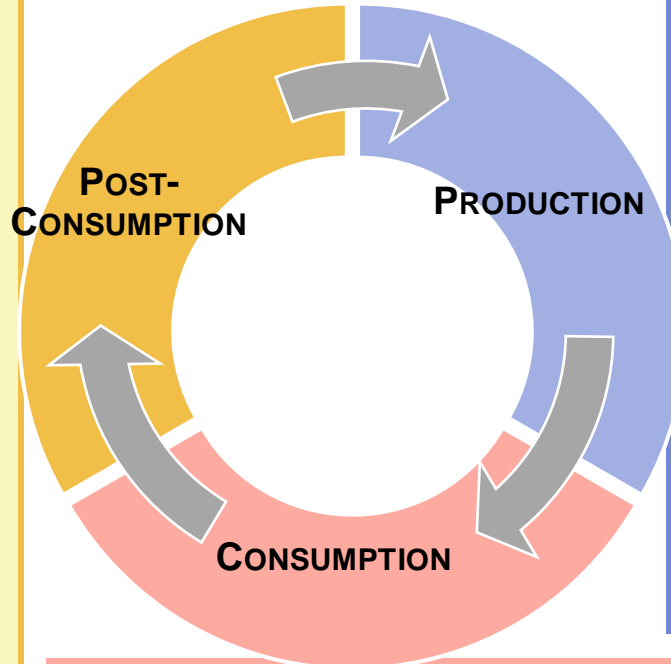
Life cycle stages are overlaid by colour throughout the report content using this legend. There is a hyperlink embedded within the legend to return to this page for reference if required.

| | |
|------------------------|--------------------------------------------------|
| Lifecyle stages legend | Production (Materials, Design, Manufacturing) |
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |

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'



- 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

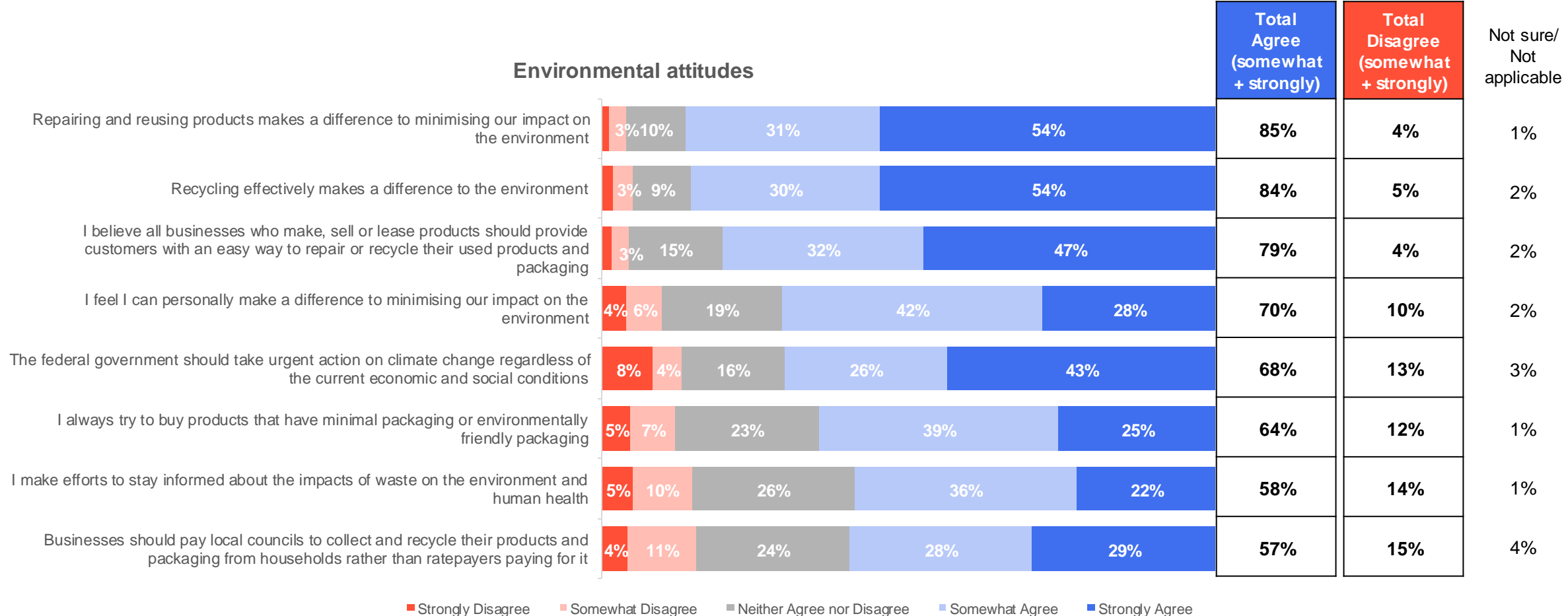
ATTITUDES AND KNOWLEDGE OF PRODUCT STEWARDSHIP CONSIDERATIONS

3

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.



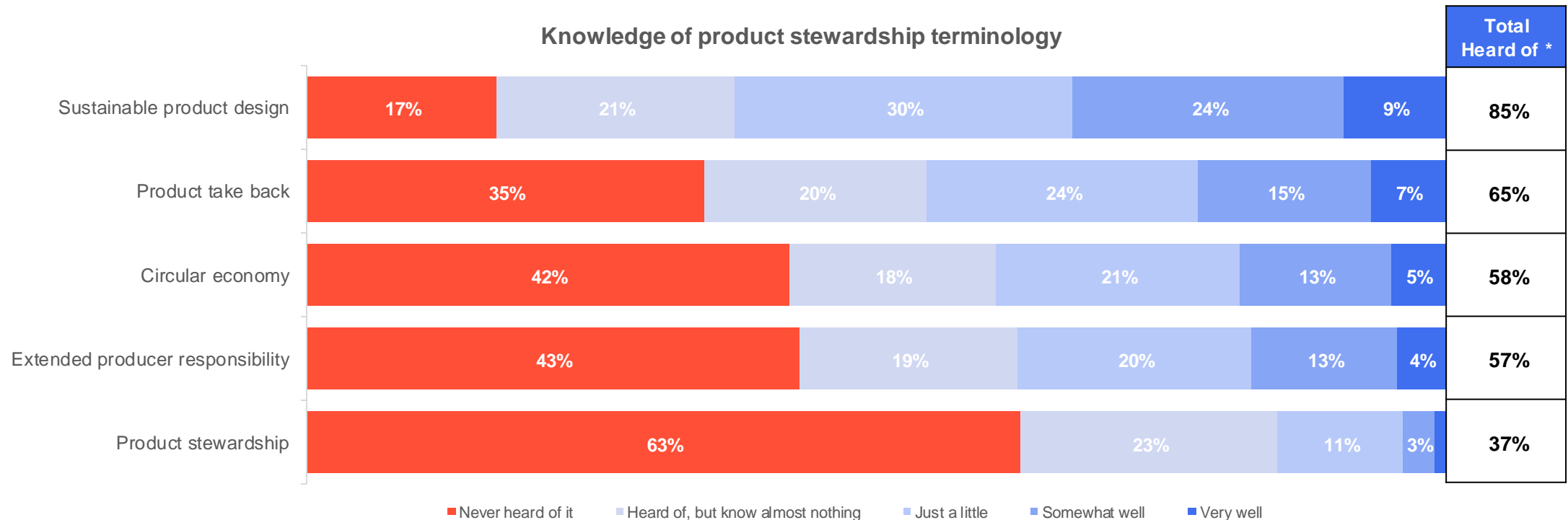
Positively aligned attitudes are much the same regardless of demographic profile

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 | |

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.



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% | 84% | 92% | 89% | 85% | 78% ▼ | 85% | 81% | 69% | 87% | 83% | 833 |
| Product take back | 67% | 64% | 64% | 74% | 76% ▲ | 67% | 57% ▼ | 67% | 63% | 58% | 50% | 65% | 650 |
| Circular economy | 61% | 54% | 54% | 62% | 63% | 62% | 52% ▼ | 59% | 56% | 58% | 37% | 57% | 576 |
| Extended producer responsibility | 60% | 54% | 54% | 66% | 69% ▲ | 56% | 49% ▼ | 57% | 58% | 49% | 50% | 29% | 566 |
| Product stewardship | 44% ▲ | 31% ▼ | 31% ▼ | 42% | 41% | 44% ▲ | 31% ▼ | 42% ▲ | 29% ▼ | 29% | 37% | 37% | 373 |

Product stewardship is most commonly linked to the concept of overall management and ownership 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.



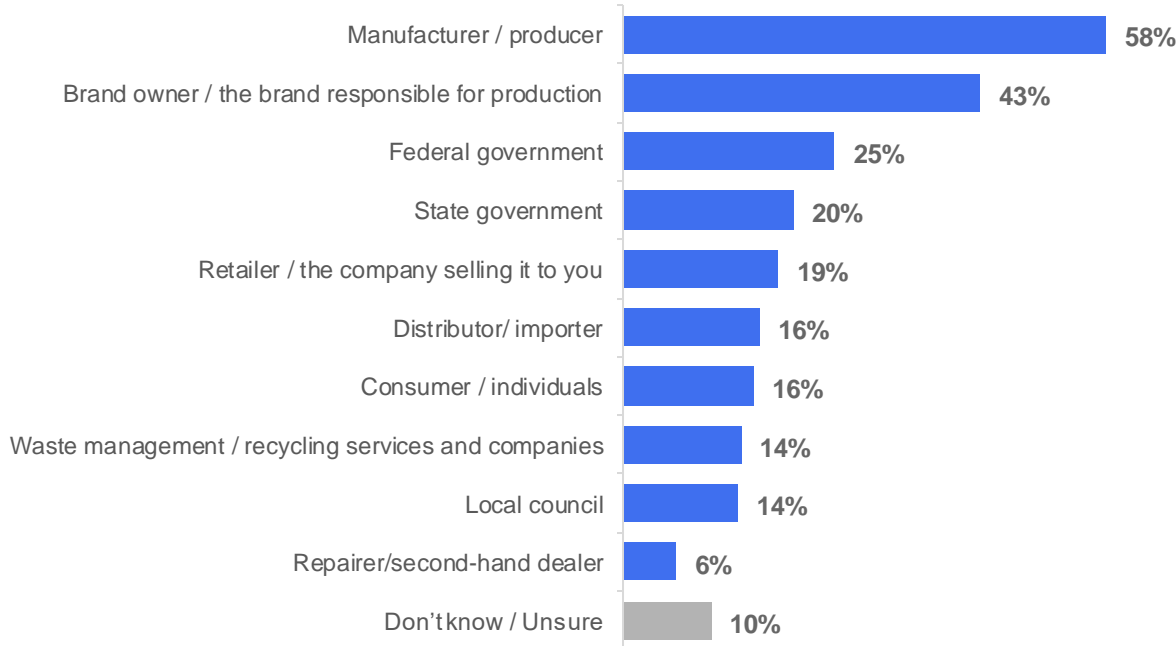
PRODUCT STEWARDSHIP RESPONSIBILITY EXPECTATIONS

4

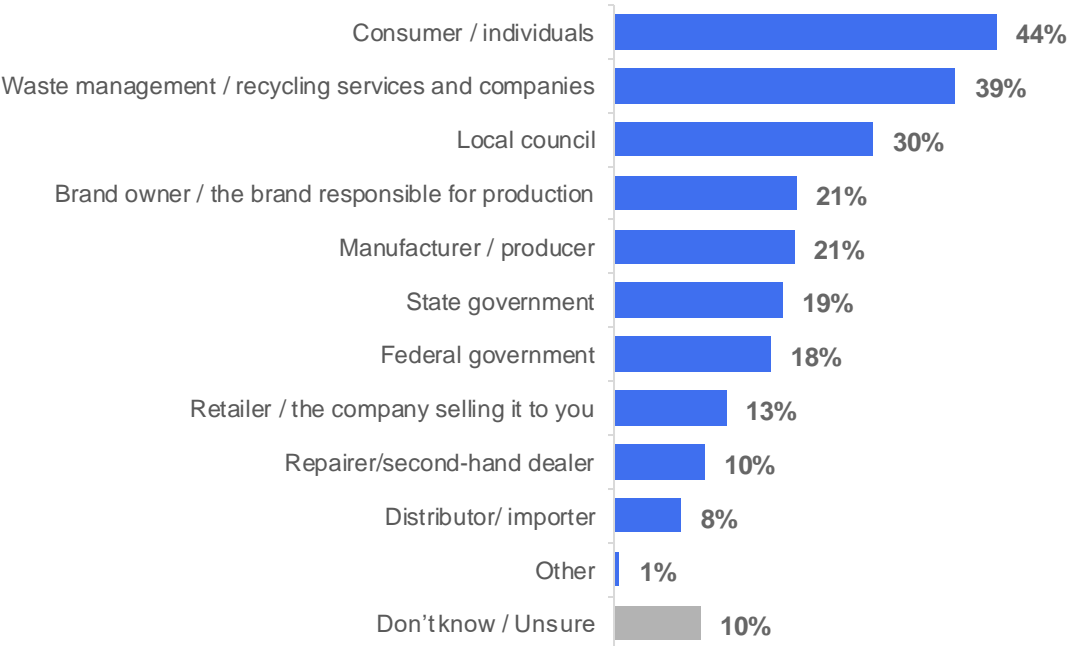
Those who were surveyed are leaning on their existing perceptions about who is normally responsible for products at different life stages, rather than thinking about the product over its whole lifecycle

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.

Responsible for the product at its *manufacturing and production stage*



Responsible for the product at the *end of its life*



| Lifecycle stages | Production (Materials, Design, Manufacturing) |
|------------------|-----------------------------------------------|
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |



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 | |

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

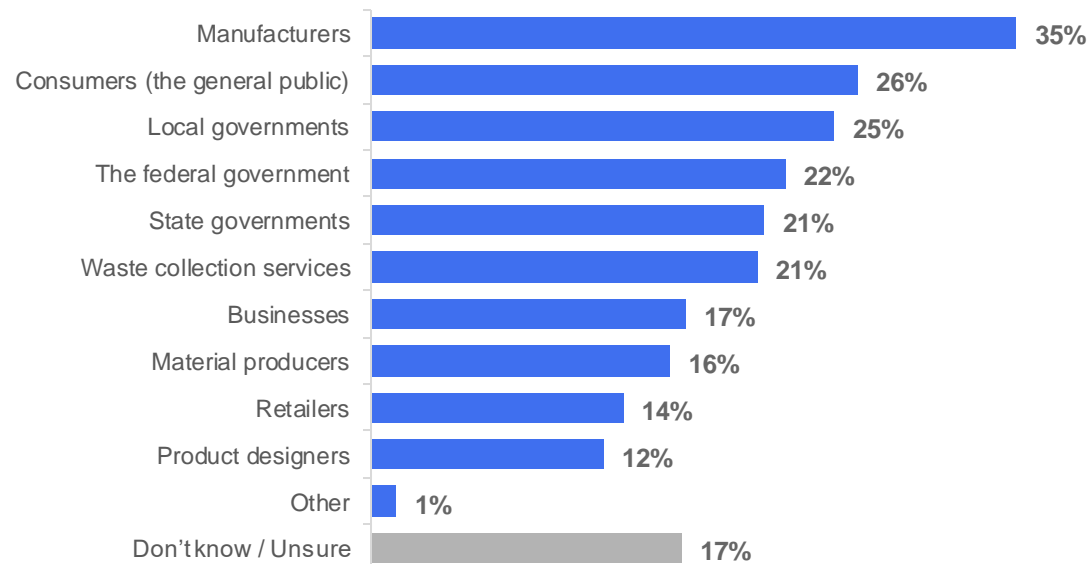
Of those surveyed, 50+ year olds are significantly less likely than younger age groups to think the brand, retailer, state or federal government is responsible for managing the social and environmental impact at the end of its life.

| 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 |

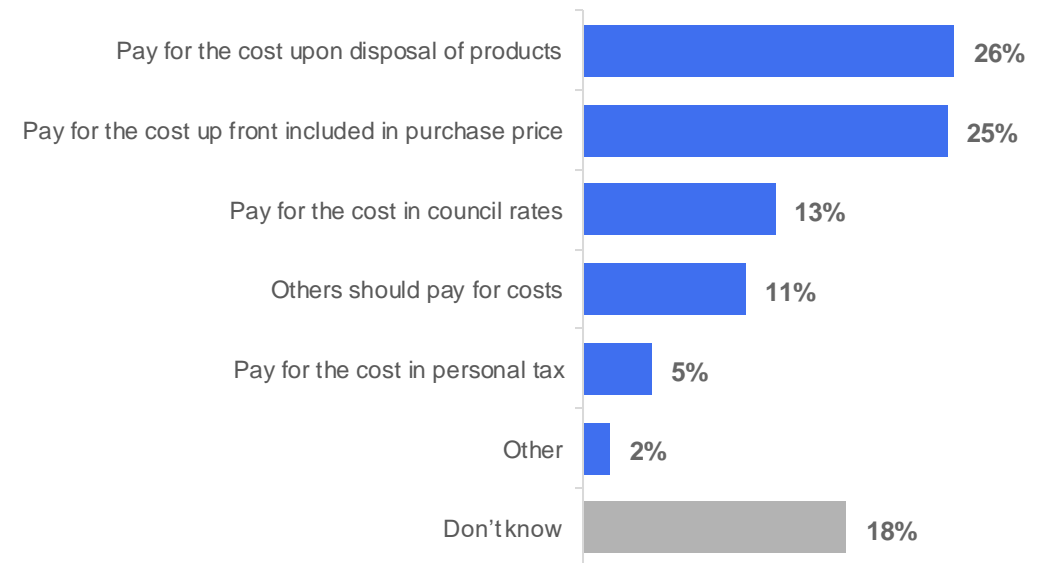
There is division as to who should pay for costs associated with end of life (i.e., owner, user or government)

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.

Who should pay for the cost of recycling and disposal?



When should this cost be paid?



| Lifecycle stages | Production (Materials, Design, Manufacturing) |
|------------------|-----------------------------------------------|
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |



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 | |

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 end of life costs for products 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 |

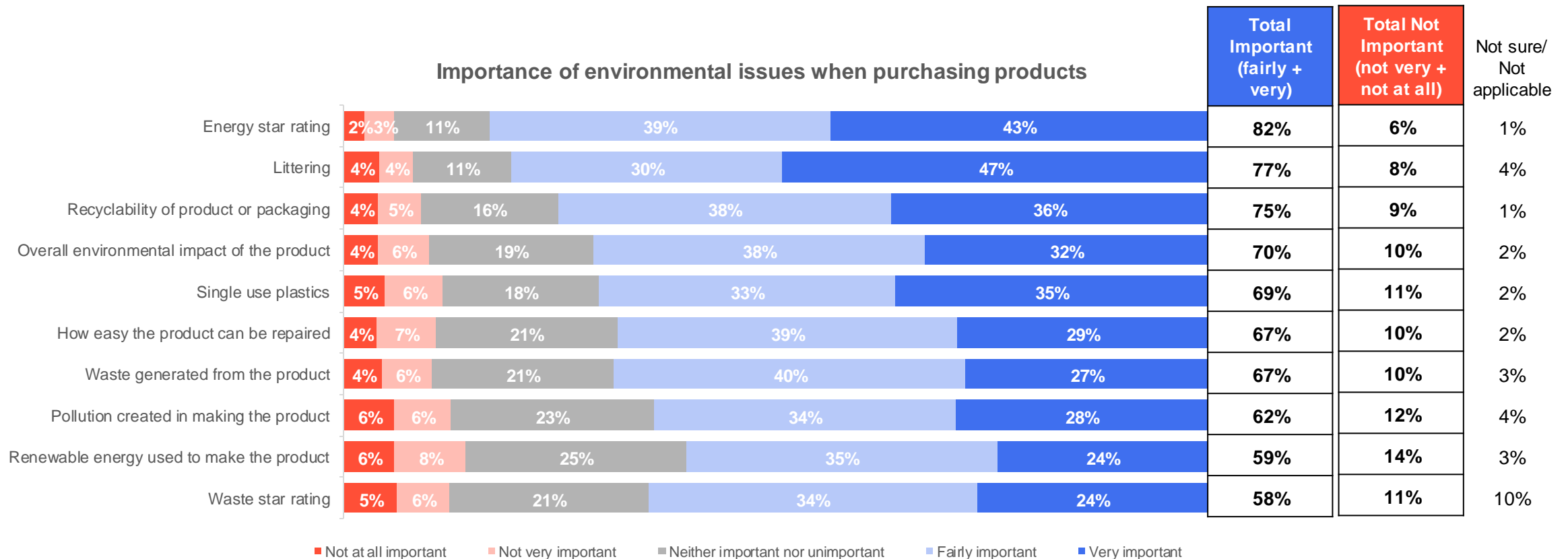
DRIVERS

Decision making & priorities of consumers

5

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.



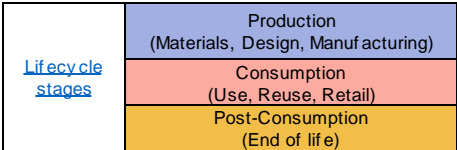
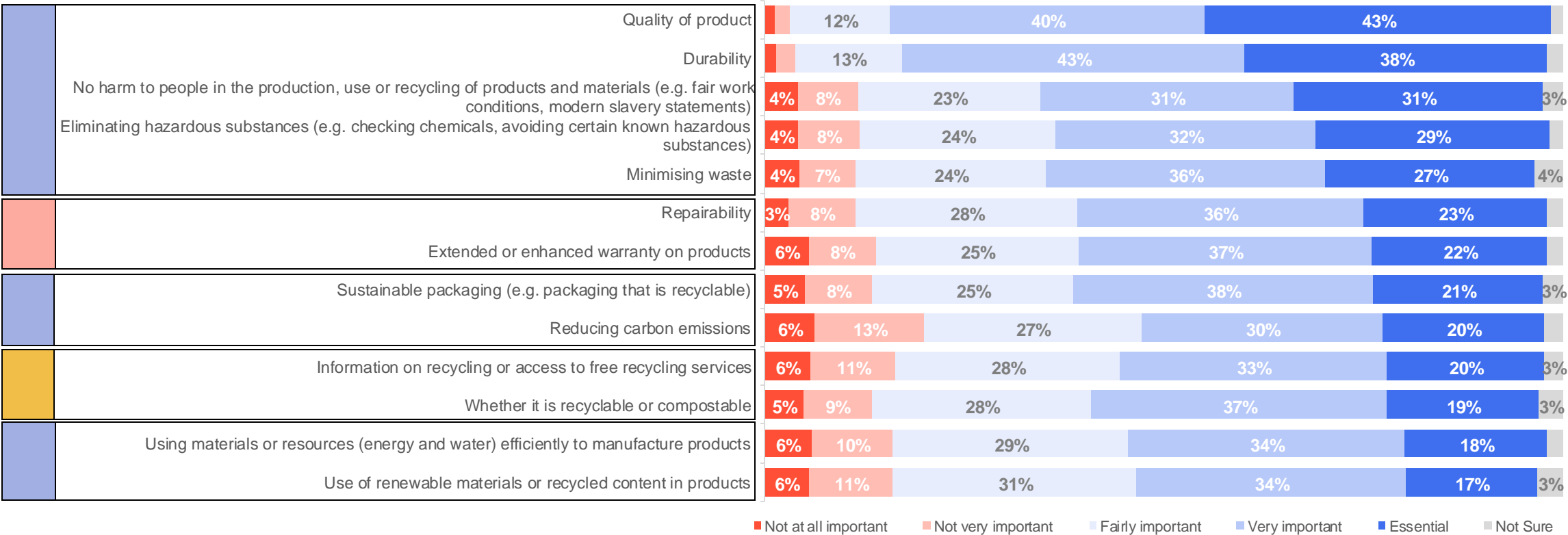
Key demographic insight: females are significantly more likely than males to consider that recyclability, overall environmental impact and single use plastics are important when purchasing products

| | 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 | |

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.

Consumers priorities when purchasing products



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

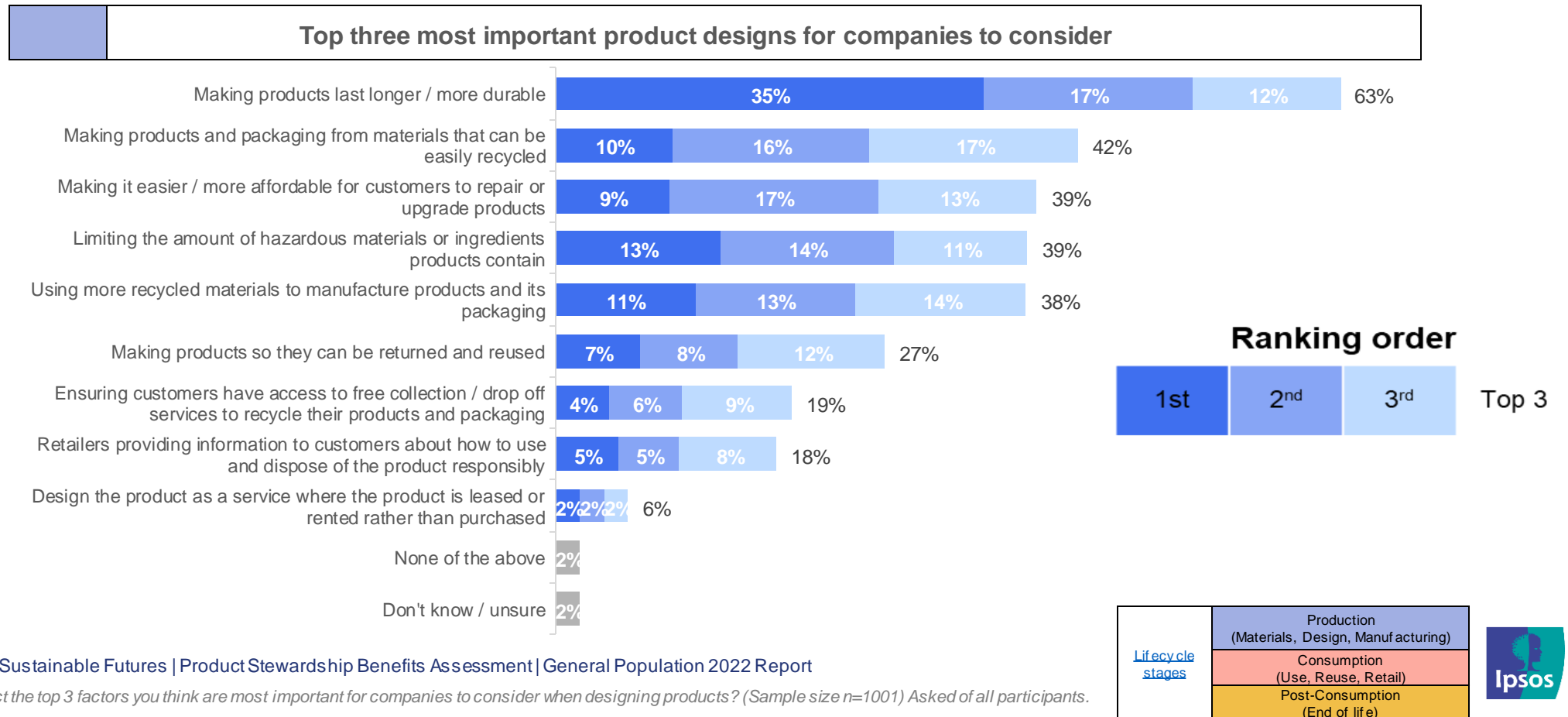


There are no differences in demographic profile among those surveyed who think that these considerations are ‘essential’ when **purchasing products**

| | 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 | |

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.



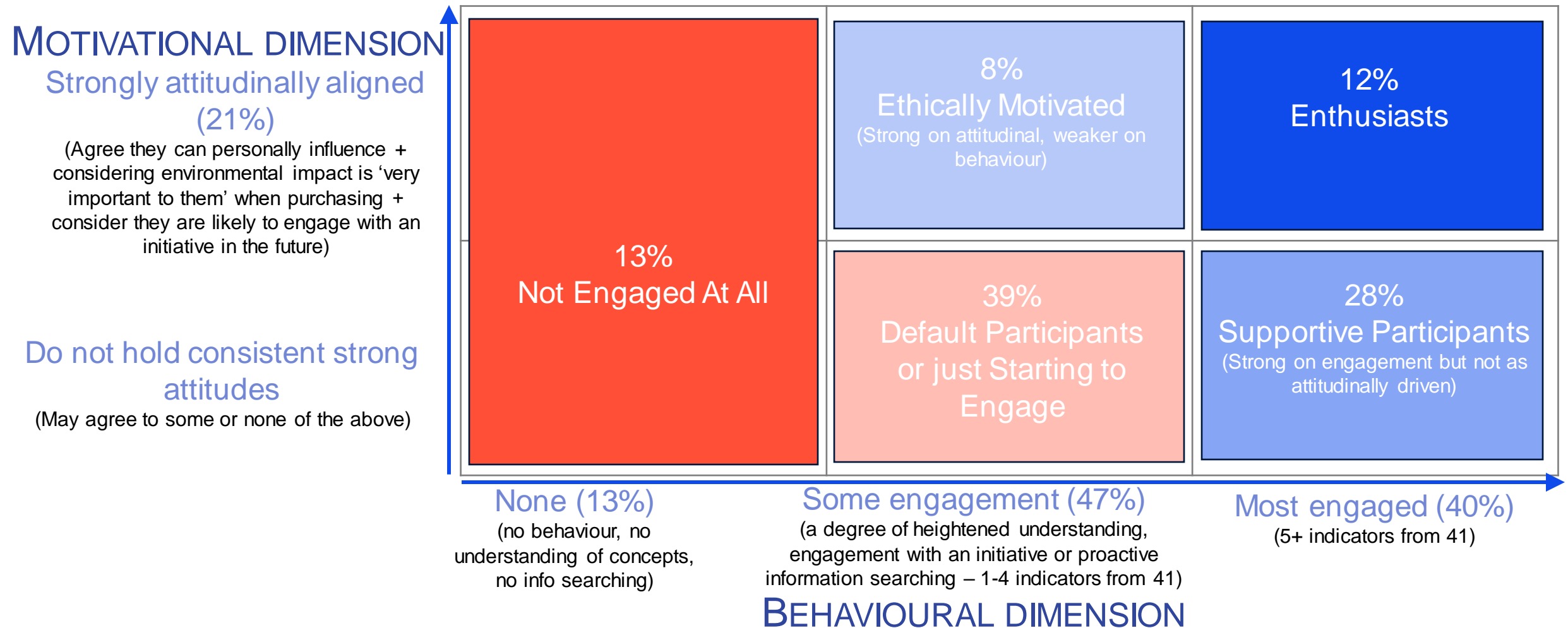
Consumer priorities for the production design are much the same regardless of demographic profile

| | 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% | 30% | 27% | 24% | 40% | 38% | 33% | 39% | 26% | 50% | 35% | 348 |
| Limiting the amount of hazardous materials or ingredients products contain | 11% | 16% | 16% | 19% | 15% | 11% | 13% | 14% | 11% | 23% | 14% | 13% | 135 |
| Using more recycled materials to manufacture products and its packaging | 8% | 14% | 14% | 15% | 14% | 11% | 9% | 12% | 11% | 8% | 23% | 11% | 113 |
| Making products and packaging from materials that can be easily recycled | 8% | 11% | 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% | 9% | 11% | 10% | 8% | 9% | 8% | 11% | 6% | 0% | 9% | 92 |
| Making products so they can be returned and reused | 7% | 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% | 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% | 5% | 3% | 6% | 3% | 4% | 4% | 4% | 12% | 0% | 4% | 43 |

PRODUCT STEWARDSHIP CONSIDERATION IN BEHAVIOUR

6

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



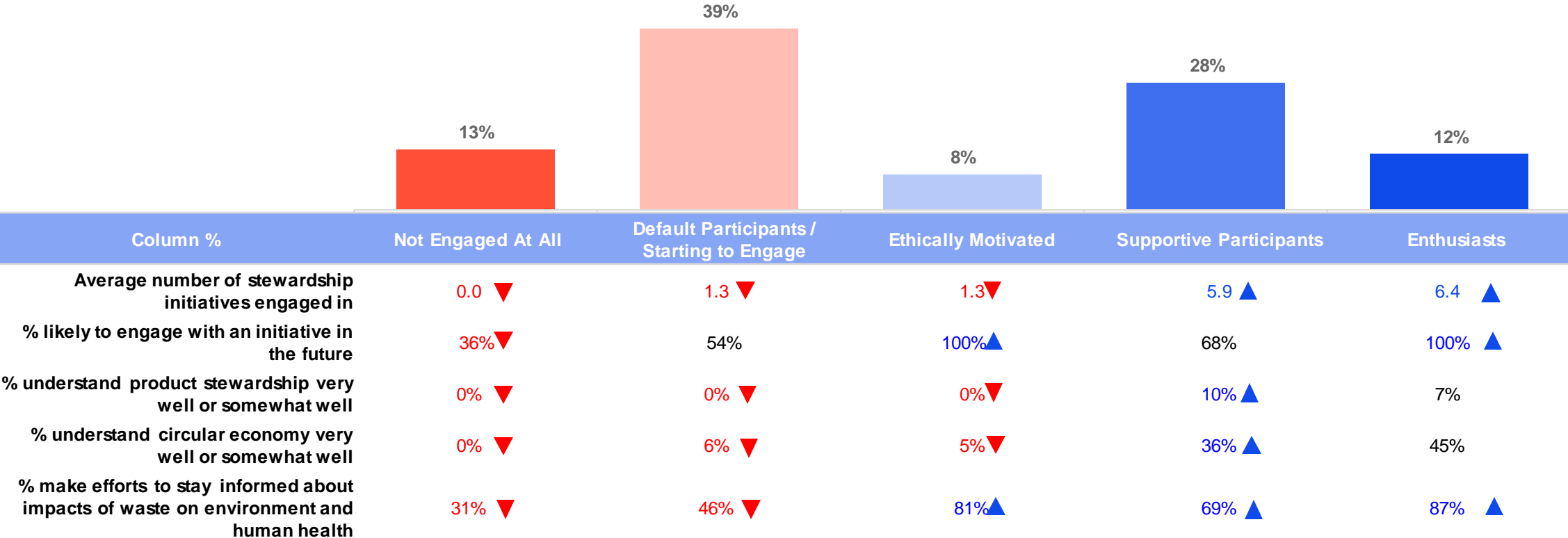
Attitudinal Dimension: Q3.4 Strongly or somewhat agree that 'I feel I can personally make a difference to minimizing our impact on the environment.' Asked of all participants. Q7.1 How important or unimportant are each of the following issues to you when purchasing products? 'Overall environmental impact 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 purchase or have 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



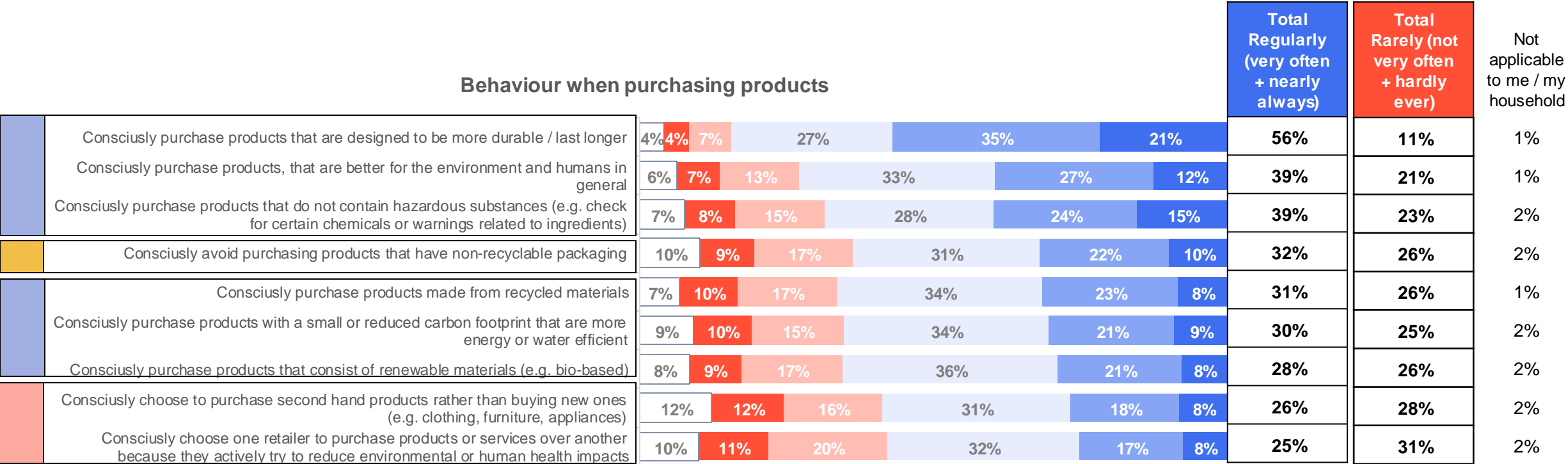
Product durability and longevity are key drivers even for those not actively seeking to increase responsible consumption

| 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%) | Demographics largely similar across all groups | | | |
| Information seeking | <p>41% would not know where they would go for more information</p> <p>Likely sources are</p> <ul style="list-style-type: none"> Council website (27%) Brand website (20%) <p>Key information would be</p> <ul style="list-style-type: none"> 'how long a product will last for' (57%), 'how to make a product use its full life' (47%) 'how to repair myself' (46%) | <p>Likely sources of information</p> <ul style="list-style-type: none"> Council website (36%) Brand website (29%) Manufacturers website (26%) <p>Key information would be</p> <ul style="list-style-type: none"> 'how long a product will last for' (54%) 'how to make a product use its full life' (48%) | <p>Likely sources include</p> <ul style="list-style-type: none"> Council website (46%) Brand/Manufacturers website (both 40%) Also highly likely to check with Retailer (38%) 20% would like to receive information from the Product Stewardship Centre of Excellence <p>Key information would be</p> <ul style="list-style-type: none"> 'how to make a product use its full life' (59%) other durability/longevity information | <p>Likely sources include</p> <ul style="list-style-type: none"> Council website (39%) Brand/Manufacturers website (both 37%) Also highly likely to check with a Government website (36%) 21% would like to receive information from the Product Stewardship Centre of Excellence <p>Key information would be</p> <ul style="list-style-type: none"> 'how long a product will last for' (56%) 'how to make a product use its full life' (49%) | <p>Will use many sources starting with</p> <ul style="list-style-type: none"> Council website (55%) Brand websites (52%) 32% would like to receive information from the Product Stewardship Centre of Excellence <p>Key information would be</p> <ul style="list-style-type: none"> '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 | <p>Top 3 Essential considerations:</p> <ul style="list-style-type: none"> Quality of product (31%) Durability (25%) Minimising waste (20%) <p>Other behaviours: less likely to recycle, give away or donate to charity</p> | <p>Top 3 Essential considerations:</p> <ul style="list-style-type: none"> Quality of product (40%) Durability (32%) No harm to people (25%) <p>Other behaviours: less likely to engage in non-household recycling</p> <p>Key initiatives:</p> <ul style="list-style-type: none"> Container Deposit Schemes (45%) Plus some use of Cartridges 4 Planet Ark (14%) | <p>Top 3 Essential considerations:</p> <ul style="list-style-type: none"> Quality of product (63%) Durability (60%) Eliminating hazardous substances (59%) <p>Key initiatives:</p> <ul style="list-style-type: none"> Container Deposit Schemes (42%) ALDI battery recycling (14%) | <p>Top 3 Essential considerations:</p> <ul style="list-style-type: none"> Quality of product (43%) Durability (37%) No harm to people / Eliminating hazardous substances (both 28%) <p>Other behaviours; more likely to recycle outside household</p> <p>Key initiatives:</p> <ul style="list-style-type: none"> Container Deposit Schemes (57%) Officeworks recycling (50%) Cartridges 4 Planet Ark (39%) plus niche engagement in initiatives such as IKEA buy-back (20%) | <p>Top 3 Essential considerations:</p> <ul style="list-style-type: none"> Durability (60%) No harm to people (58%) Eliminating hazardous substances (58%) <p>Other behaviour: actively recycling elsewhere, reselling, donating or giving to others</p> <p>Key initiatives:</p> <ul style="list-style-type: none"> Container Deposit Schemes (63%) Officeworks recycling (49%) Cartridges 4 Planet Ark (47%) Battery World recycling (41%) plus niche engagement in initiatives such as SimplyCups (29%) and Flurocycle (19%) |

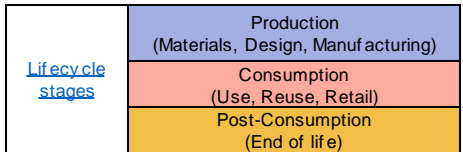
When purchasing products, durability is most often considered in the decision making process

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.



□ Never ■ Hardly ever ■ Not very often ■ Sometimes/ occasionally ■ Very often ■ Nearly always



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



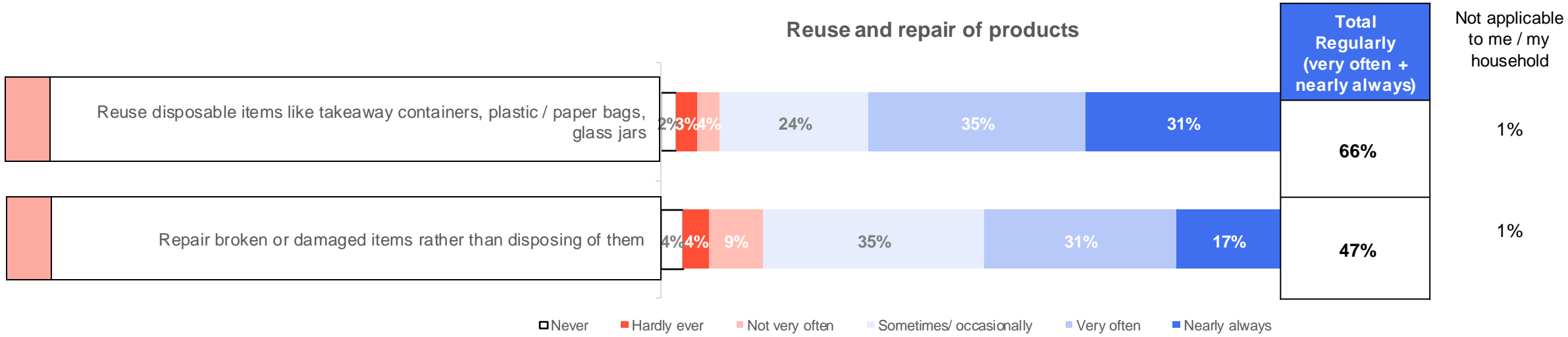
Key demographic insight: females are significantly more likely than males to make conscious purchase decisions regularly about products being – better for the environment, made from recycled materials and avoiding non recycled packaging

| | 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 |

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.



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.

| | |
|------------------|-----------------------------------------------|
| Lifecycle stages | Production (Materials, Design, Manufacturing) |
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |

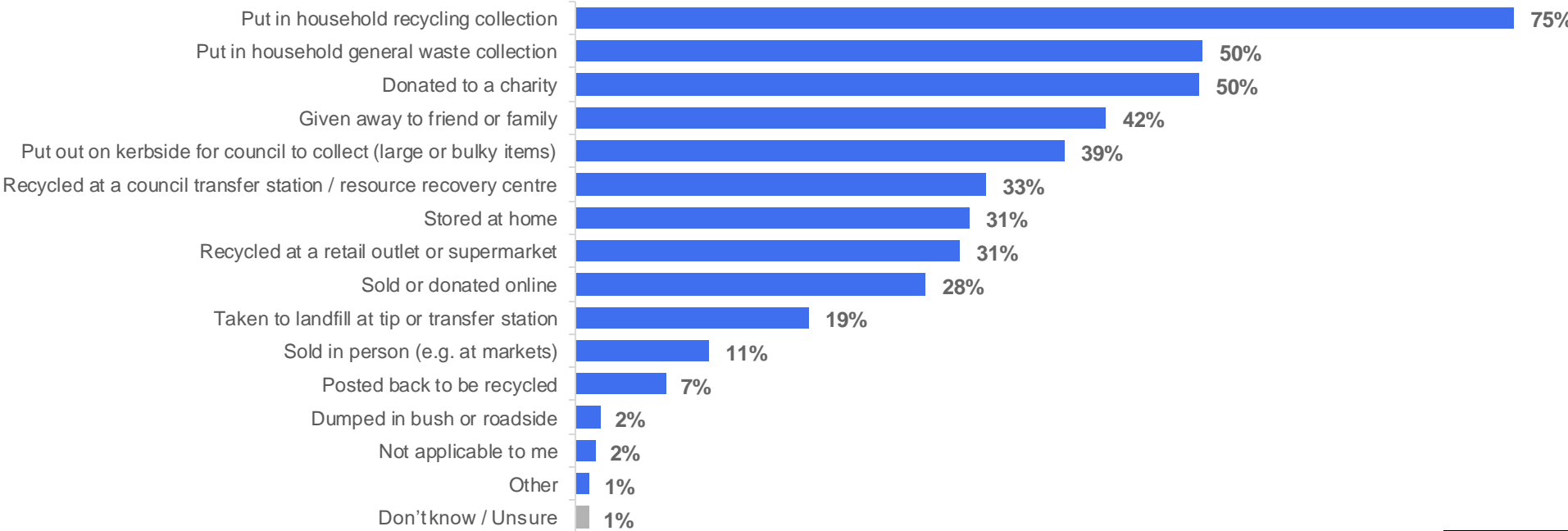
Key demographic insight: females are significantly more likely than males to reuse disposable items regularly

| Total Regularly (very often + nearly always) | Column % | | 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 |
|-----------------------------------------------------------------------------------|----------|--------|---------------|---------------|---------------|-----------|------------------------|------------------------|------------------------|------------------|-------|-------------|
| | Male | Female | | | | | | | | | | |
| 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 |

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.

Disposal behaviours



| | |
|------------------|-----------------------------------------------|
| Lifecycle stages | Production (Materials, Design, Manufacturing) |
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |



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 | |

FUTURE OPPORTUNITIES

7

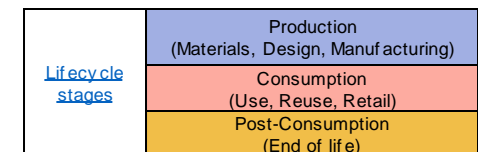
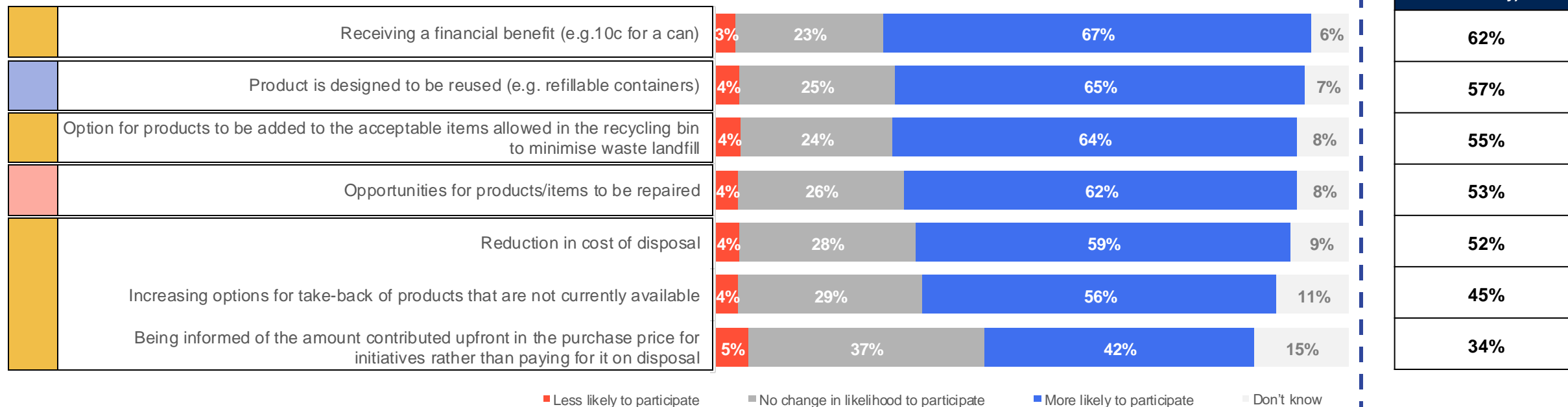
Categorised by product class

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.

Being informed of costs associated with end-of-life disposal at point of purchase is of least appeal.

Factors to influence participation in product stewardship



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 |

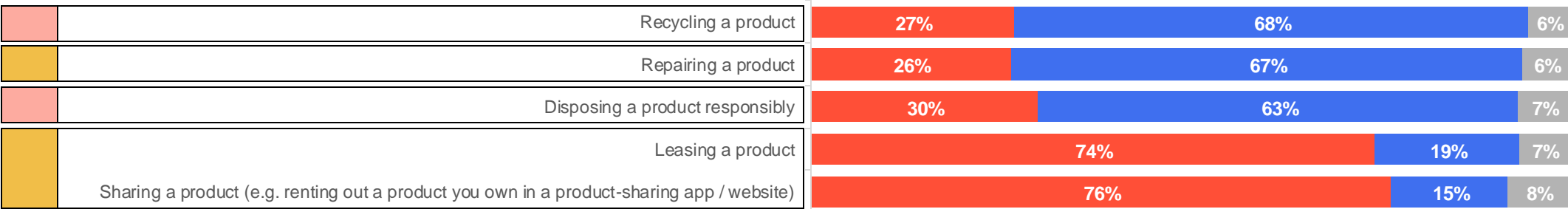
INFORMATION PREFERENCES

8

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

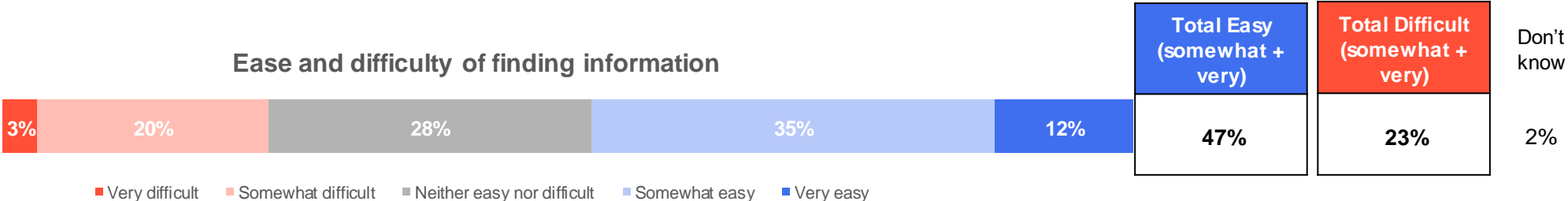
There is an opportunity here to make it easier for the public to find this type of information when they do actively information seek, as only half found it relatively easy to find and a quarter found it difficult. This finding does not change across information types.

Searched for information on...

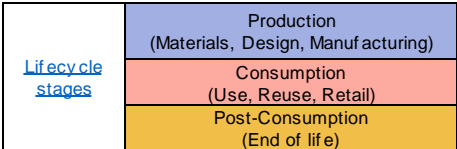


■ No ■ Yes ■ Don't know/Unsure

Ease and difficulty of finding information



■ Very difficult ■ Somewhat difficult ■ Neither easy nor difficult ■ Somewhat easy ■ Very easy



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. 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.

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’

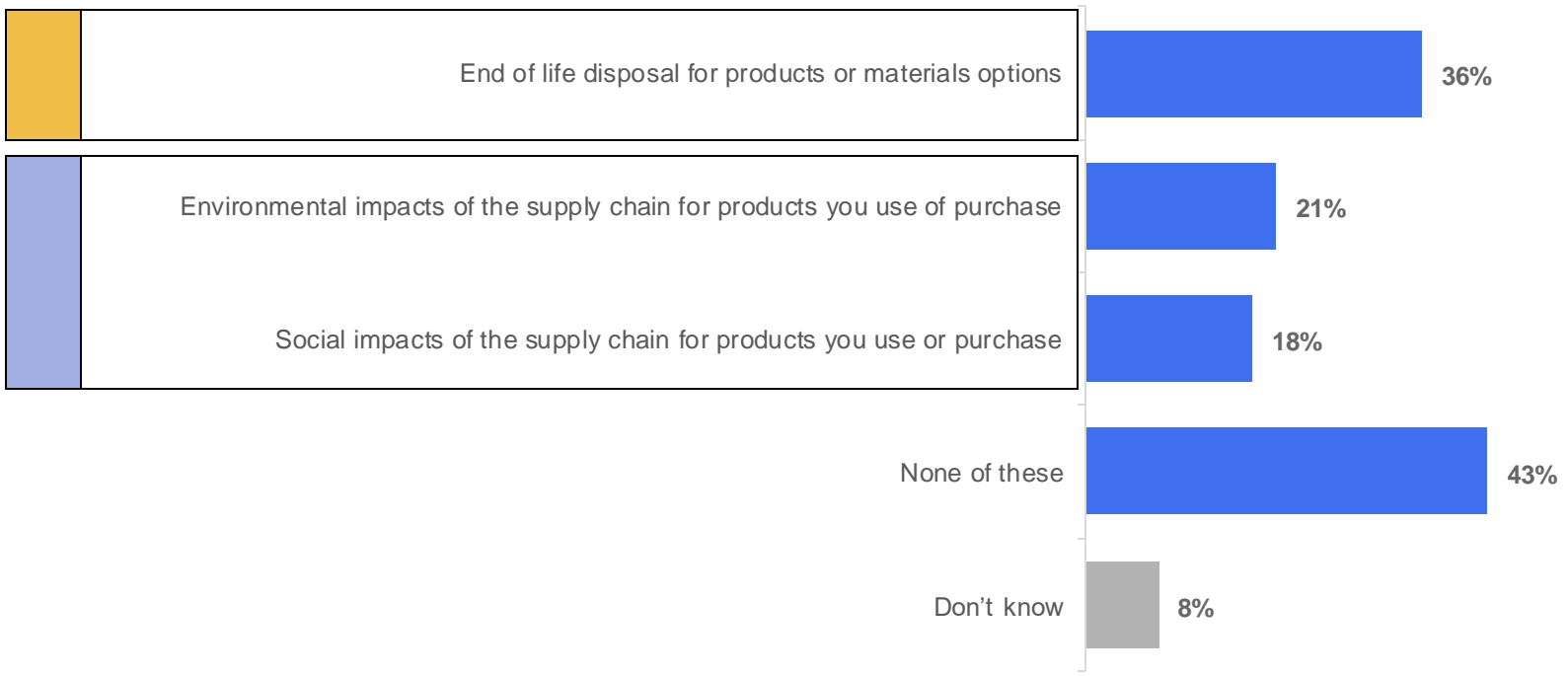
Older age groups (50+ years) are significantly less likely than younger age groups to find it easy to find information on recycling, repairing, disposing of, leasing or sharing a product. This is consistent with well known generational differences in technology capability.

| 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 |

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



| | |
|------------------|-----------------------------------------------|
| Lifecycle stages | Production (Materials, Design, Manufacturing) |
| | Consumption (Use, Reuse, Retail) |
| | Post-Consumption (End of life) |



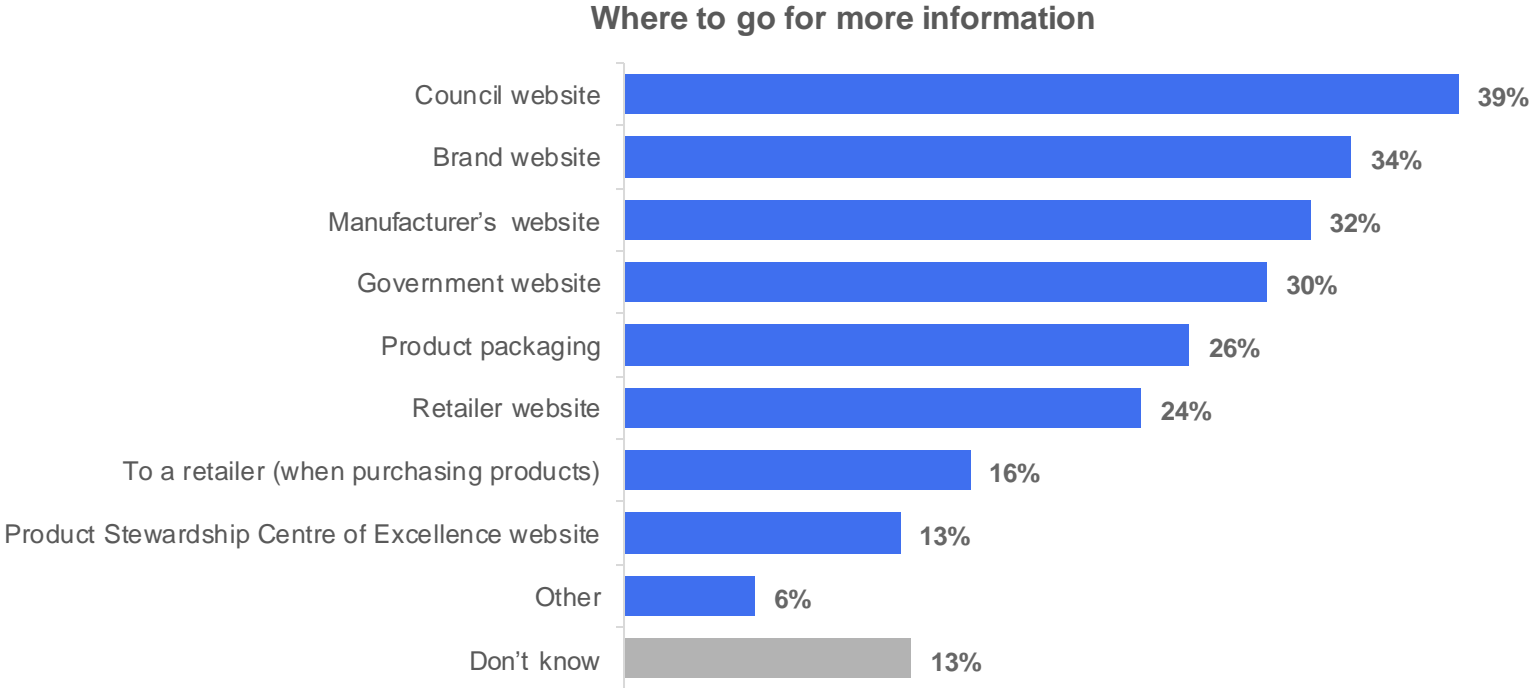
Key demographic insight: there are some significant differences across gender, age and region for searching for information, but differences in age are most salient once again

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 | |

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 leaned 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.

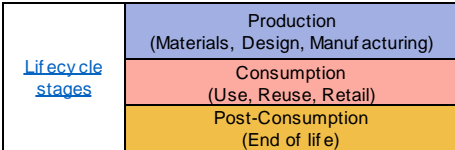
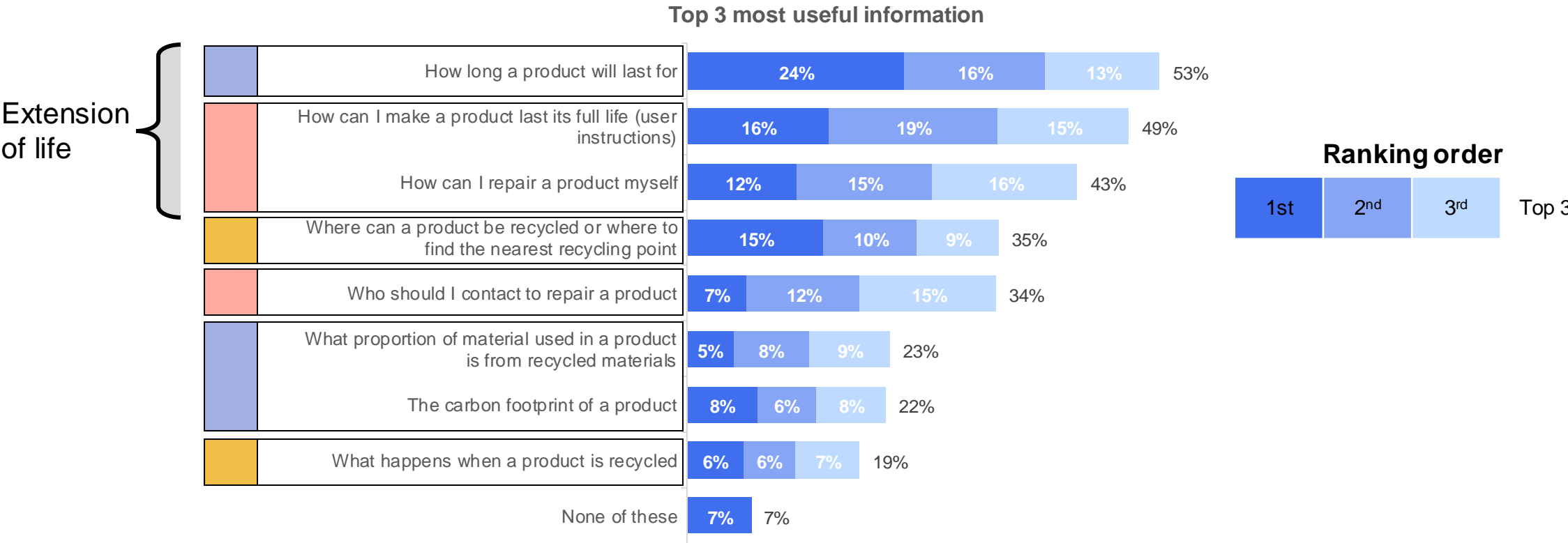


Key demographic insight: older age groups will revert to Council as a source of information while younger age groups would seek information in a retail context

| 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 |

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.



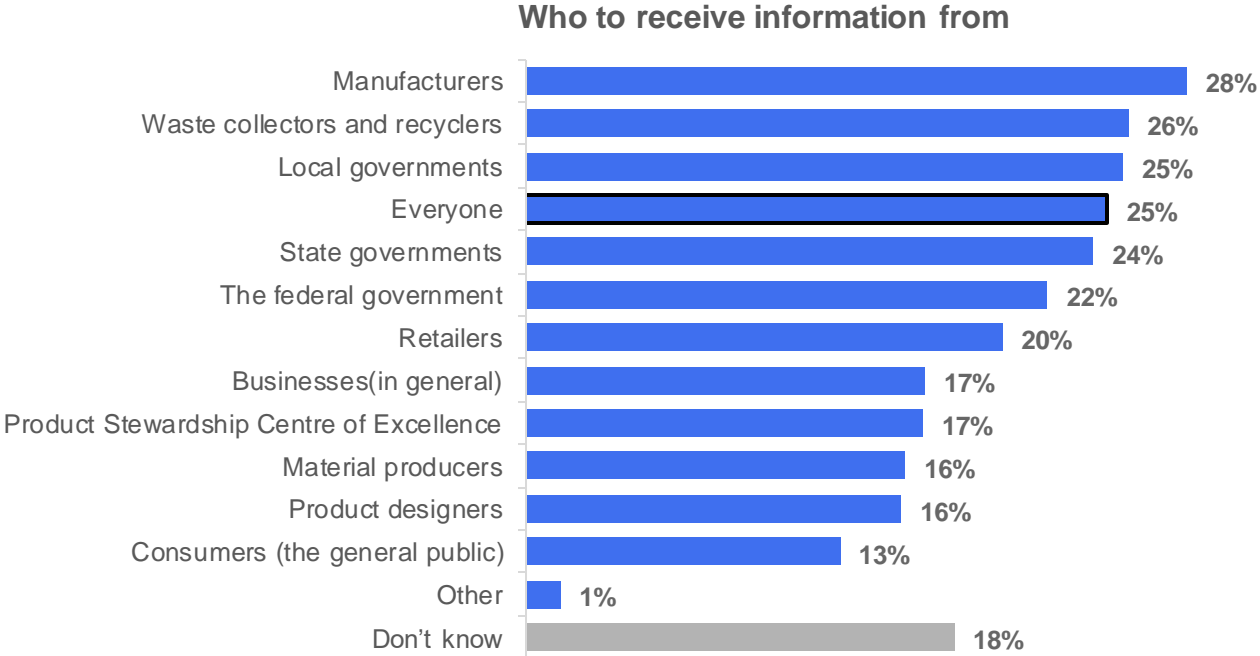
Key demographic insight: generational differences continue to be seen for information preferences, with the younger population more engaged with environmental topics

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 | |

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.



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% | 26% | 22% | 24% | 31% | 30% | 27% | 31% | 23% | 37% | 28% | 280 |
| Waste collectors and recyclers | 26% | 25% | 25% | 25% | 26% | 25% | 26% | 25% | 27% | 25% | 23% | 26% | 255 |
| Local governments | 25% | 25% | 25% | 26% | 22% | 25% | 27% | 24% | 28% | 20% | 14% | 25% | 254 |
| Everyone | 23% | 27% | 27% | 39% ▲ | 21% | 24% | 22% | 23% | 27% | 28% | 37% | 25% | 247 |
| State governments | 26% | 22% | 22% | 28% | 21% | 25% | 23% | 24% | 24% | 23% | 14% | 24% | 241 |
| The federal government | 25% | 20% | 20% | 31% | 21% | 26% | 18% | 21% | 23% | 25% | 14% | 22% | 221 |
| Retailers | 19% | 21% | 21% | 36% ▲ | 21% | 20% | 16% ▼ | 20% | 20% | 25% | 14% | 20% | 202 |
| Businesses(in general) | 17% | 17% | 17% | 27% ▲ | 20% | 19% | 12% ▼ | 17% | 19% | 11% | 0% | 17% | 169 |
| Product Stewardship Centre of Excellence | 17% | 17% | 17% | 16% | 17% | 19% | 16% | 17% | 17% | 14% | 23% | 17% | 168 |
| Material producers | 16% | 16% | 16% | 20% | 16% | 18% | 14% | 16% | 17% | 20% | 0% | 16% | 161 |
| Product designers | 16% | 16% | 16% | 19% | 14% | 17% | 16% | 16% | 17% | 11% | 14% | 16% | 160 |
| Consumers (the general public) | 13% | 13% | 13% | 18% | 17% | 13% | 11% | 14% | 12% | 8% | 13% | 13% | 133 |
| Other | 2% | 1% | 1% | 0% | 0% | 1% | 3% ▲ | 2% | 0% | 3% | 0% | 1% | 15 |
| Don't know | 18% | 18% | 18% | 10% | 20% | 21% | 18% | 17% | 19% | 23% | 26% | 18% | 182 |

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