

A THROWAWAY WORLD

The Challenge of Plastic Packaging and Waste

An Ipsos Survey

GAME CHANGERS



AGENDA

01 KEY FINDINGS

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KEY FINDINGS

1

KEY FINDINGS

Majority believe manufacturers should be obliged to reduce packaging waste



1

A CALL FOR ACTION

80% of people around the world say that manufacturers **should be obliged to help with the recycling and reuse of the packaging that they produce**. 71% believe that single use plastic products should be banned as soon as possible.

2

TIME FOR CHANGE

People around the world **say they are ready** for change. Three in four global consumers (75%) now say they want to buy products with **as little packaging as possible**.

3

BRANDS CAN EXPECT PAYOFF

75% of global consumers say they **feel better about brands which make changes** to achieve better environmental outcomes.

4

TWO LIMITS TO CHANGE

We find big variations in assessments of the **local household recycling service around the world**. And, although 63% say they would be willing to **change where they shop** if it meant they would use less packaging, this sentiment varies considerably by country.

DETAILED RESULTS

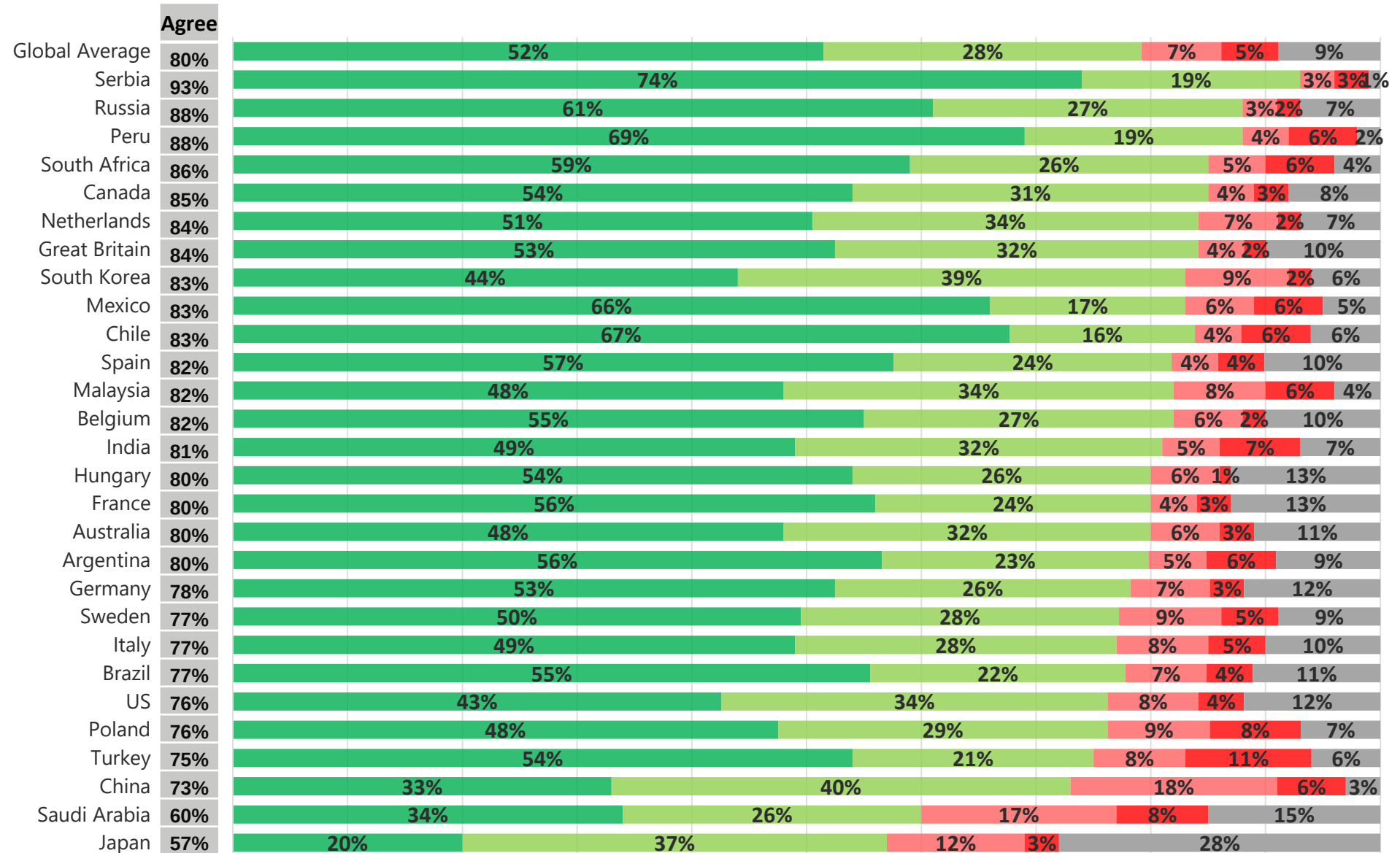
2

SUPPORT FOR MANUFACTURERS' RESPONSIBILITY

Q. Do you agree or disagree with the following statement?

Manufacturers should be obliged to help with the recycling and reuse of packaging that they produce

Support for manufacturers' responsibility in helping with the recycling and reuse of packaging which they produce is particularly strong in countries like Serbia (93%), Russia (88%), Peru (88%), and South Africa (86%) where our survey also records particularly low level of satisfaction with the quality of the local recycling service for household waste.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

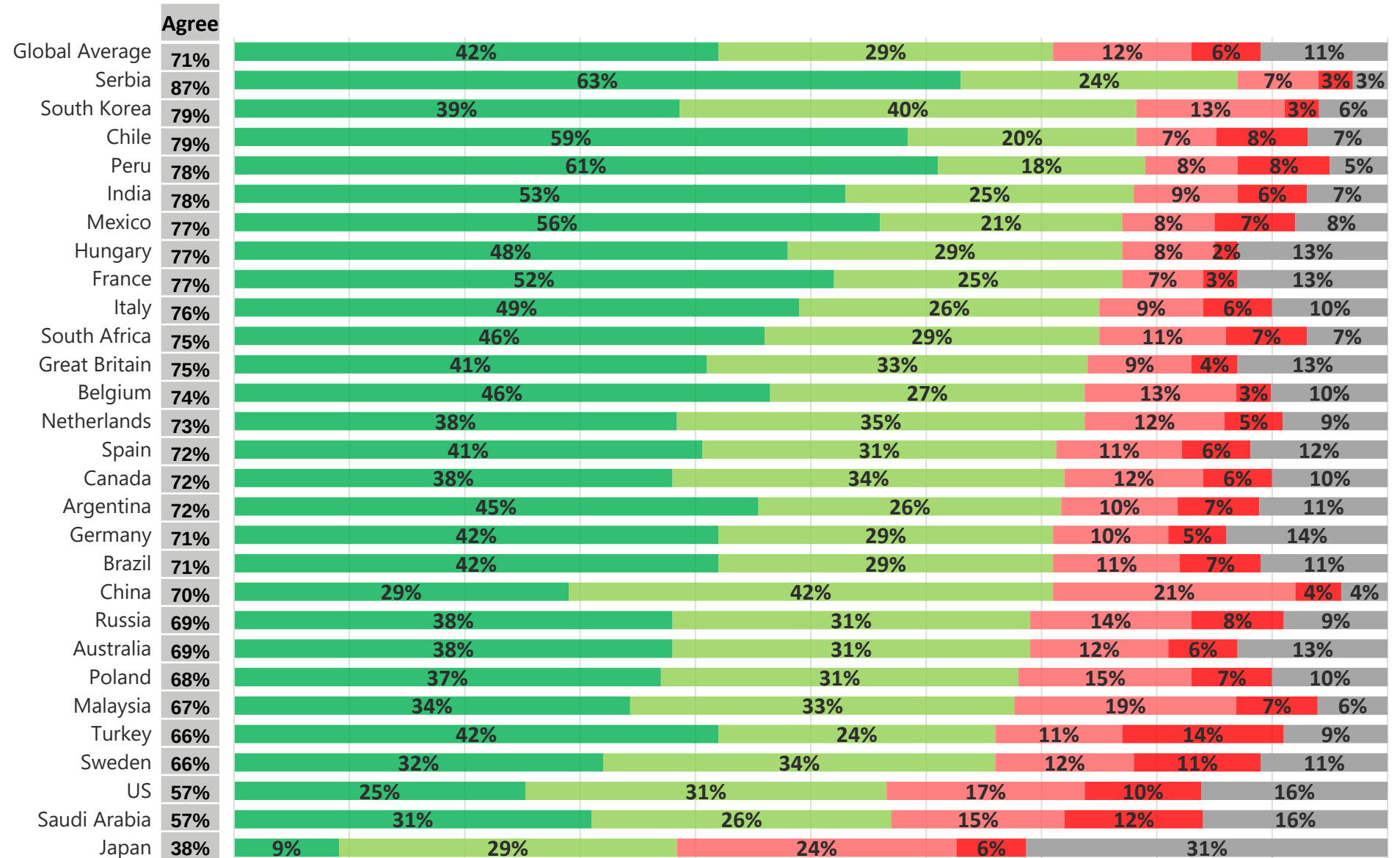
Base: 19515 online adults under the age of 75 across 28 countries. Fieldwork dates: July 26th – Aug. 9th 2019

URGENCY OF THE BAN ON SINGLE-USE PLASTICS

Q. Do you agree or disagree with the following statement?

Single use plastics should be banned as soon as possible

71% of global consumers believe that single use plastic products should be banned as soon as possible, with support for such a move breaking the 7 in 10 barrier in 19 of the countries surveyed. People in the US show lower levels of approval, with 57% favouring such a move.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

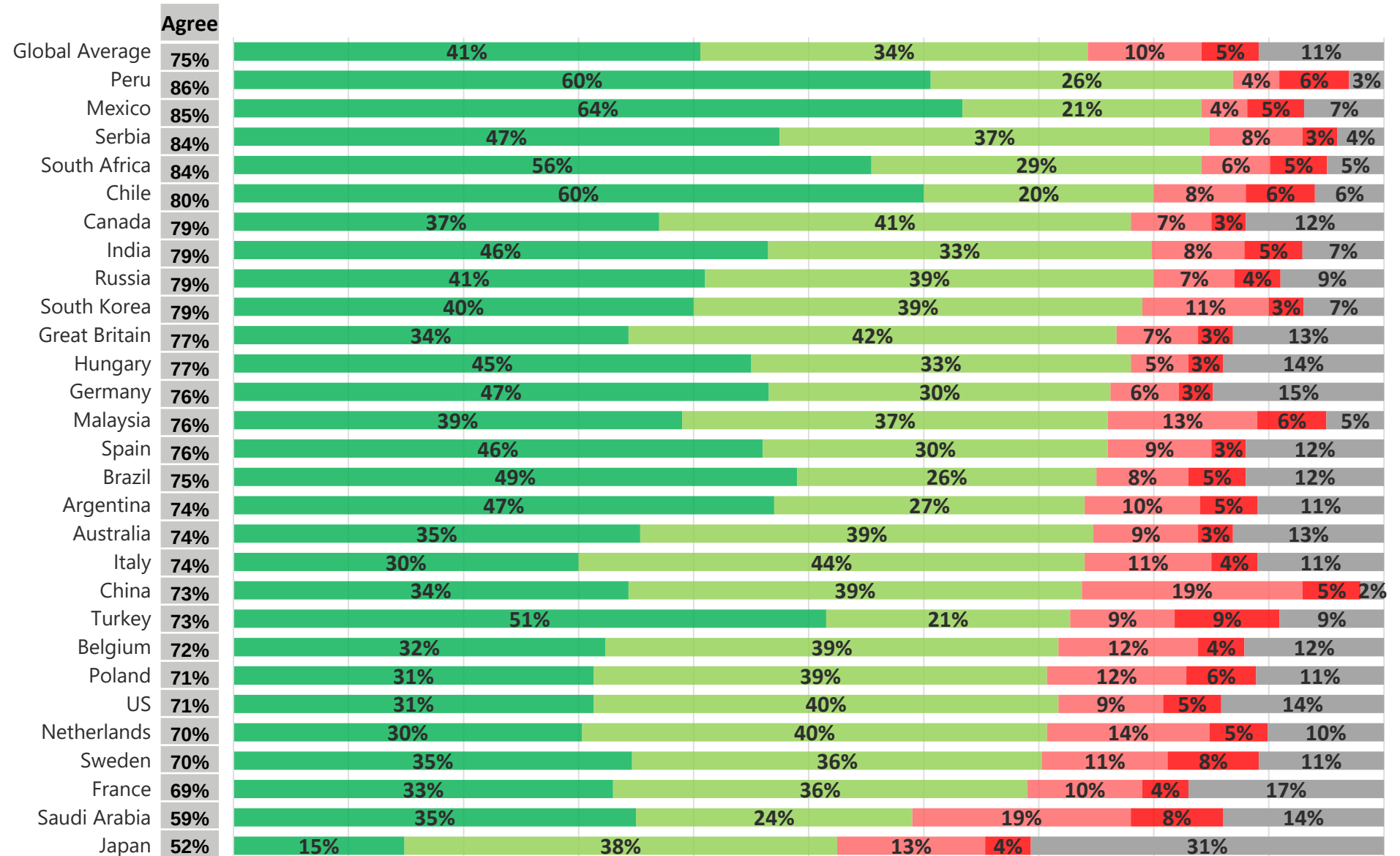
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ATTITUDES TOWARDS ENVIRONMENTALLY VIRTUOUS BRANDS

Q. Do you agree or disagree with the following statement?

I feel better about brands which make changes to achieve better environmental outcomes

A strongly positive attitude towards brands which make changes to achieve better environmental outcomes is more evident in emerging economies like Peru (60% strongly agree), Mexico (64%), Chile (60%), and also Turkey (51%), than in the most affluent countries like Japan (15%), the US (31%), the Netherlands (30%), France (33%), Sweden (35%), but also Saudi Arabia (35%) (a country with a GDP per capita higher than Germany).



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

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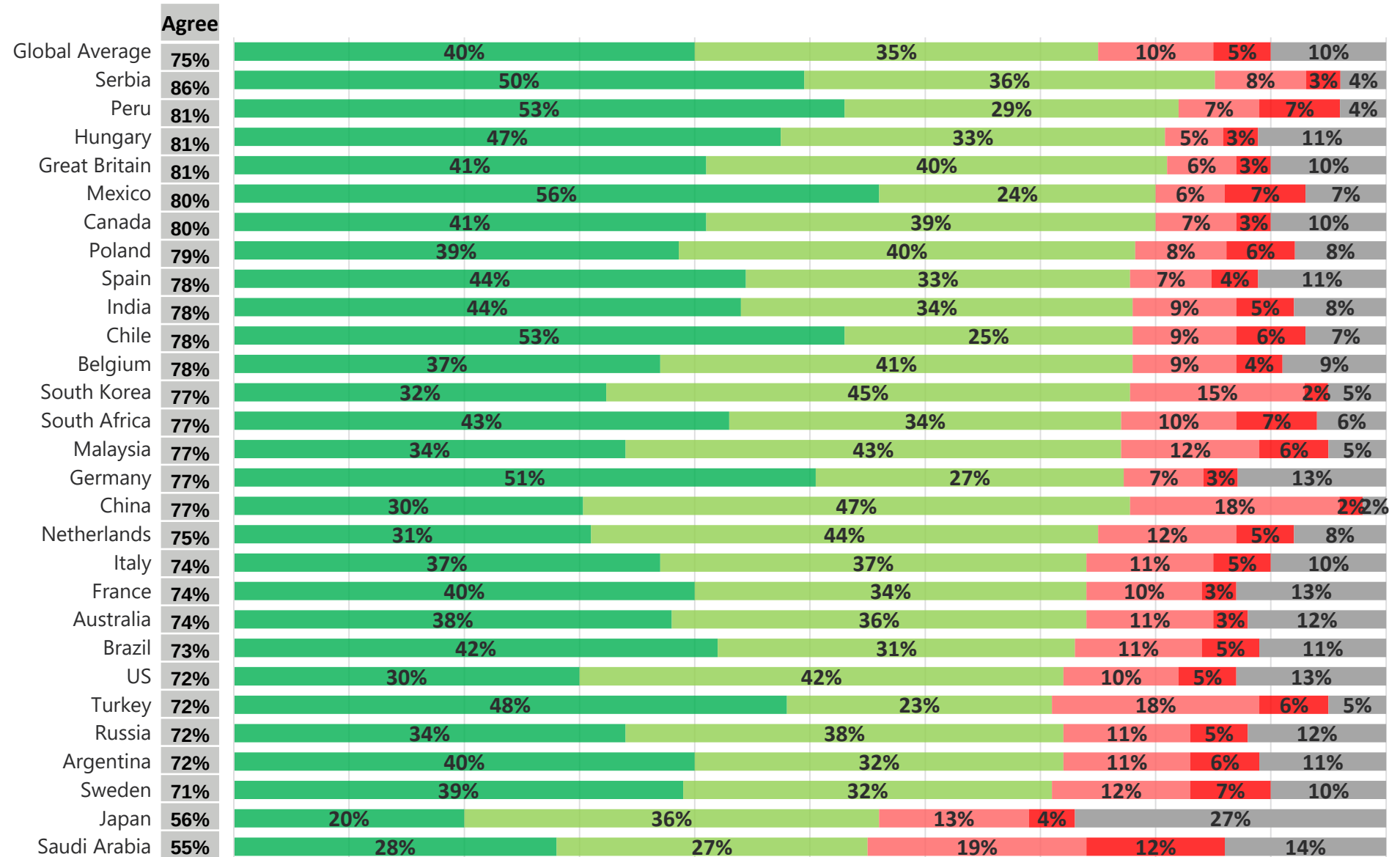
WILLINGNESS TO USE LESS PLASTICS

Q. Do you agree or disagree with the following statement?

I want to buy products which use as little packaging as possible

People around the world say they are ready for change. Three in four global consumers (75%) say they want to buy products with as little packaging as possible, a figure which rises to 81% in Great Britain, Hungary and Peru and 86% in Serbia.

Saudi and Japanese consumers (with respectively 56% and 55%) are the least determined, but nowhere does the proportion of consumers actively disagreeing surpass a third of the total.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

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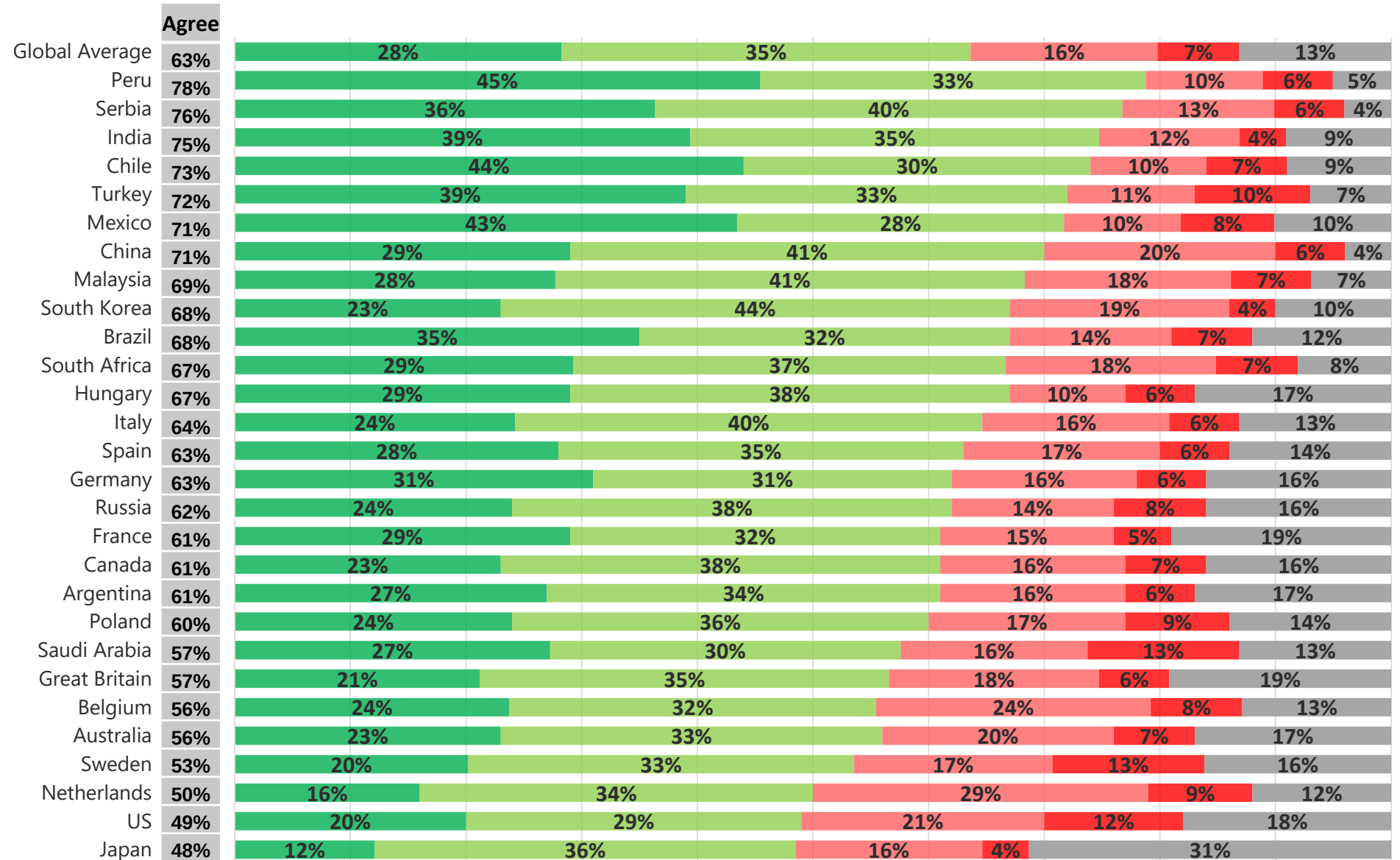
READINESS TO CHANGE SHOPPING HABITS

Q. Do you agree or disagree with the following statement?

I'd be willing to change where I shop if it meant I would use less packaging

We know there can be a gap between what people say and what they actually do, as there are limits to what people may be willing (or able) to do personally to decrease the amount of plastic they use. Across the 28 countries in the survey, 64% say they would be willing to change where they shop if it meant they would use less packaging.

But this figure falls to under 60% in many of the world's wealthiest markets, and in the US the proportion ready to change their regular shopping routine stands at 49%, with a third unwilling to change.



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

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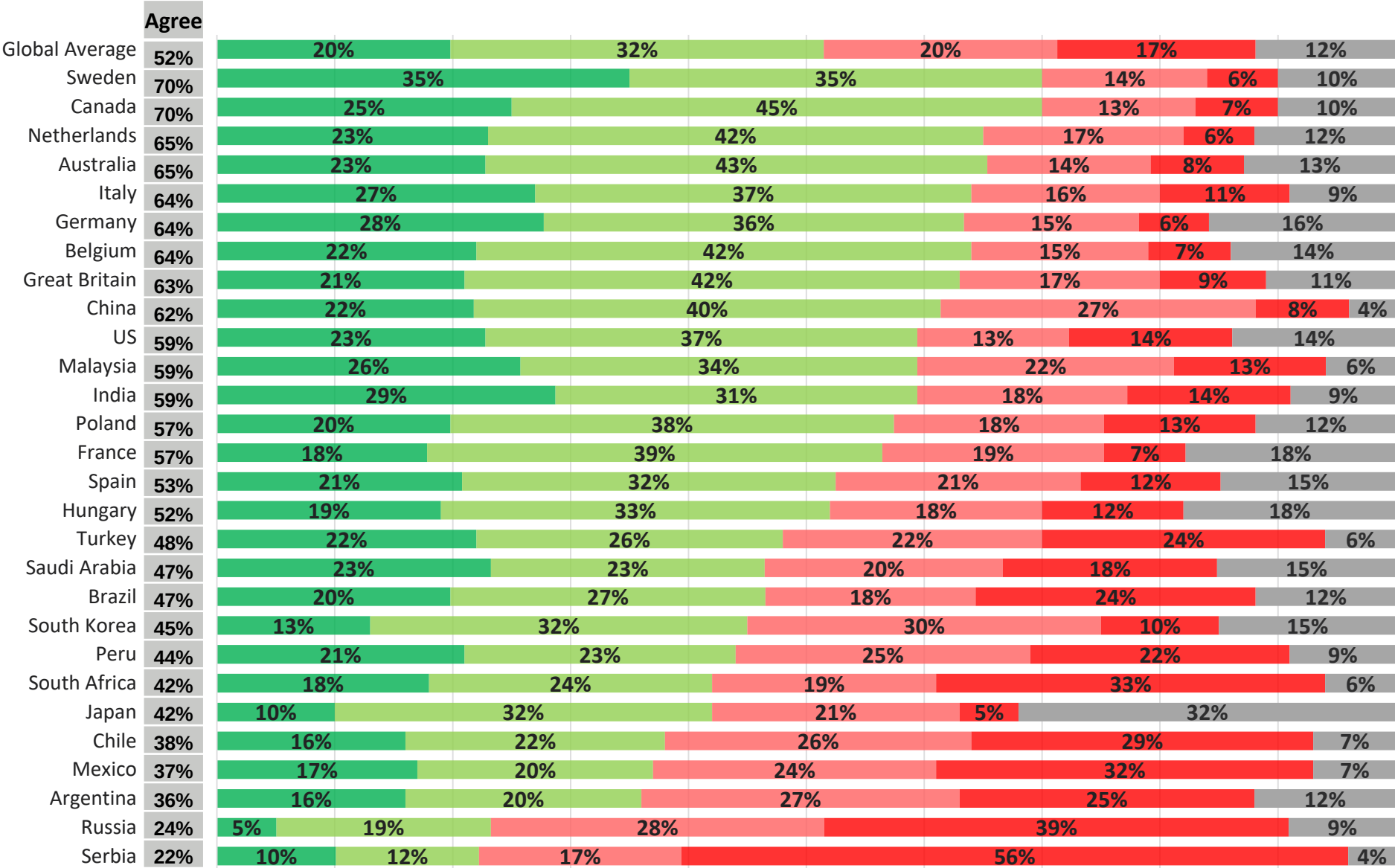
Q. Do you agree or disagree with the following statement?

The recycling service for household waste is good in the area where I live

We observe big variations around the world in assessments of the local household recycling service in the area they live. In Russia and Serbia, less than a quarter are positive (24% and 22% respectively), while in Sweden and Canada 70% agree that the facilities in place are in good shape.

In most of the emerging countries surveyed, satisfaction levels are under 50%.

QUALITY OF LOCAL RECYCLING SERVICE



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

Base: 19515 online adults under the age of 75 across 28 countries. Fieldwork dates: July 26th – Aug. 9th 2019

Q. Do you agree or disagree with the following statement?

The recycling rules for household waste are clear in the area where I live

A similar variation can be seen when it comes to the clarity of the rules for household recycling locally; they are rated particularly highly by people living in Belgium and Germany (72% and 70% respectively) and rather less so in Serbia and Russia (22% and 21%).

Once again, people in emerging countries are generally less likely to find these rules clear.

CLARITY OF LOCAL RECYCLING RULES



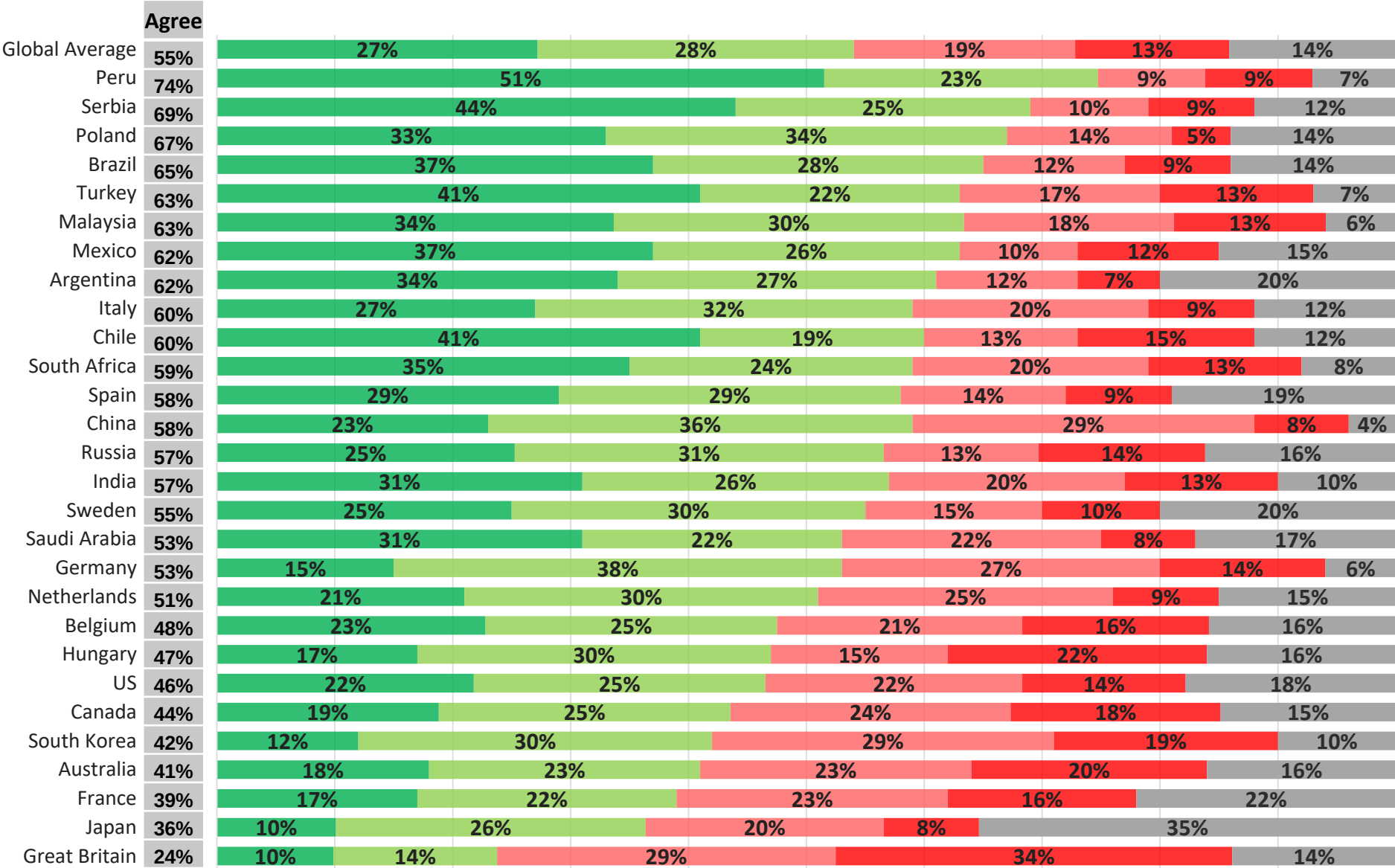
Q. Do you agree or disagree with the following statement?

All plastics can be recycled

The British are, by far, the most aware of the limits of recycling, with only a quarter (24%) believing that all plastics can be recycled.

This compares to a global average of 55% and more than two-thirds in Poland (67%), Serbia (69%) and Peru (74%), the latter two being countries where only a minority consider local recycling rules to be clear.

AWARENESS OF PLASTICS' RECYCLABILITY



Strongly agree Tend to agree Tend to disagree Strongly disagree Don't Know

Base: 19515 online adults under the age of 75 across 28 countries. Fieldwork dates: July 26th – Aug. 9th 2019



SURVEY OVERVIEW

- These are the findings of a 28-country Ipsos survey conducted via Ipsos's Global Advisor online survey platform between July 26 and August 9, 2019.
- For this survey, Ipsos interviewed a total of 19,515 adults aged 18-74 in Canada, Malaysia, South Africa, Turkey, and the United States; and 16-74 in all other markets.
- The sample consists of 1000+ individuals in each of Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the United States, and 500+ in each of Argentina, Belgium, Chile, Hungary, India, Malaysia, Mexico, The Netherlands, Peru, Poland, Romania, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden and Turkey.
- The survey data have been weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the market's most recent census data. Data collected each month are also weighted to give each market an equal weight in the total "global" sample.
- Online surveys can be taken as representative of the general adult population under the age of 75 in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, The Netherlands, Poland, South Korea, Spain, Sweden, and the United States. Online samples in Brazil, Chile, China (mainland), India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Serbia, South Africa and Turkey are more urban, more educated and/or more affluent than the general population and the results should be viewed as reflecting the views of a more "connected" population
- Sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. The precision of the Ipsos online polls is measured using a Bayesian Credibility Interval. The credibility interval around percentages based on single-month data is of +/- 3.5 percentage points for markets where the monthly sample is 1,000+ and +/-4.8 points for markets where the monthly sample is 500+. Click here for more information on the Ipsos use of [credibility intervals](#).
- Where results do not sum to 100 or the "difference" appears to be +/-1 more/less than the actual value, this may be due to rounding, multiple responses, or the exclusion of don't knows or not stated responses.

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GAME CHANGERS

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This is why our passionately curious experts not only provide the most precise measurement but shape it to provide True Understanding of Society Markets and People.

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So that our clients can act faster smarter and bolder.
Ultimately success comes down to a simple truth:
You act better when you are sure.

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GO
FURTHER.**

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