



# 2018 Awareness Survey Results

*prepared by*



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## Study Objectives and Key Measurements

Objective	Related KPI/Measurement
<b>Increase knowledge of paint recycling</b>	<i>Do you know that paint can be recycled?</i>
<b>Impact paint recycling behaviors</b>	<i>Have you ever taken paint somewhere to be recycled?</i>
<b>Decrease storage of paint in home</b>	<i>Do you currently have any leftover or unwanted paint in your home or business (e.g., primer, interior house paint, stain, deck sealer, or clear finishes like varnish)? If so, how much paint do you have?</i>
<b>Increase knowledge of PaintCare</b>	<i>Have you ever ever heard of PaintCare, the program that sets up sites that take paint for recycling?</i>
<b>Execute memorable ads</b>	<i>Do you recall seeing an advertisement for PaintCare in the last several months?</i>
<b>Stimulate word of mouth and other communications</b>	<i>Do you recall hearing about PaintCare in any of the following other ways?</i>

# Study Enhancements Made to Survey Approach

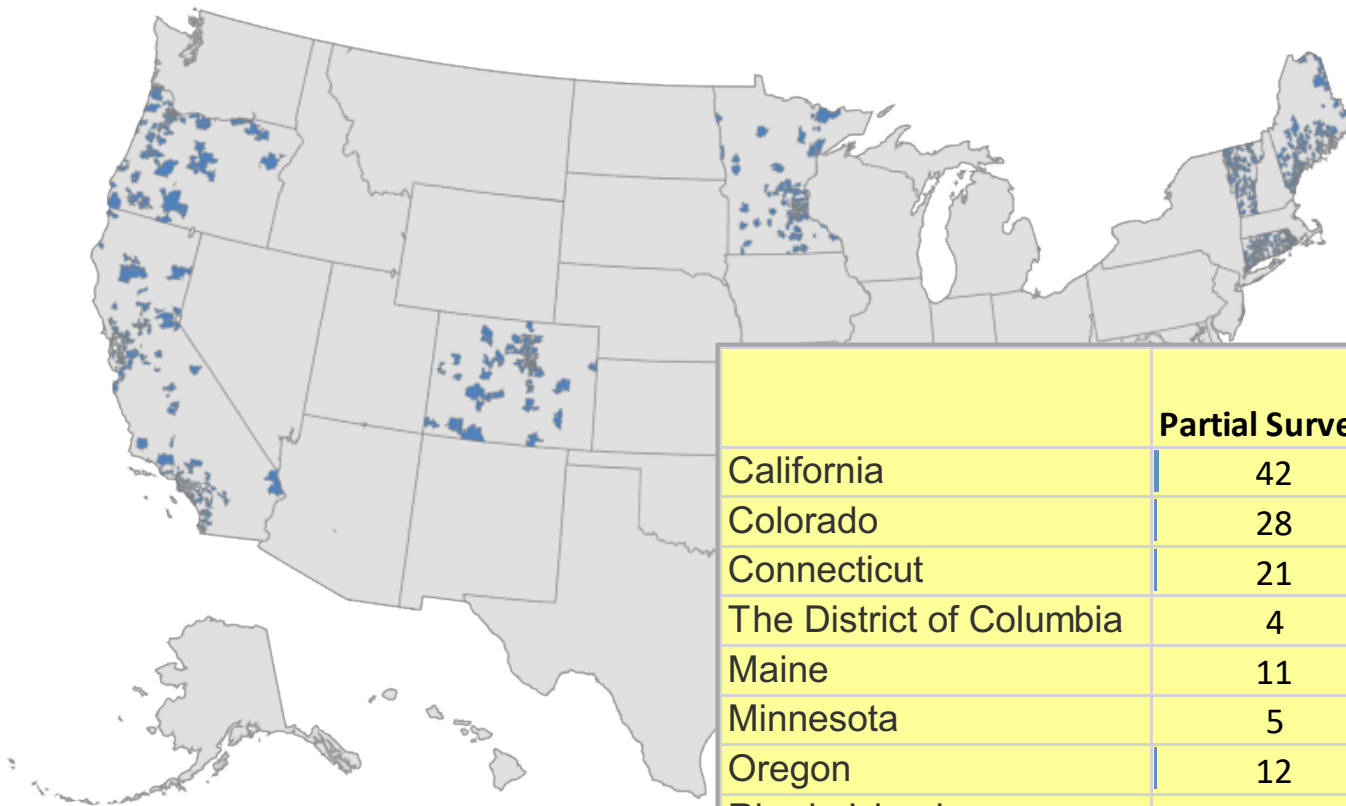
- **Improved sampling approach:**
  - Increased sample sizes to more precise measurement.
  - Managed state/district “quotas” to be more reflective of the population based on census data (e.g. age, income categories, ethnicity, etc.).
  - Implemented survey “screeners” to exclude those under 18 and those who had moved to non-participating states.
- **Enhanced survey tool:**
  - Refreshed survey by adding/deleting/updating consumer behavior questions based on prior findings.
  - Collected open-ended feedback regarding personal motivations to recycle (or not), providing insightful information with which to better communicate in the future.
  - Revised wording to better define terms for consistent understanding (e.g. “paint”)
- **Performed deeper analysis:**
  - Conducted comment categorization to understand the top reasons for recycling paint to guide future messaging
  - Compared past recycling behaviors to future intentions to better understand/predict macro-trends in consumer behavior.
  - Examined cross-tabulated data to understand pockets of consumers who recycle the most and least, to guide future targeting.



## Response Summary

- ❖ 2,626 surveys were conducted in 8 states plus the District of Columbia in November 2018.
- ❖ All states/district except California received at least 250 surveys; California, 553.
- ❖ 250 observations allows us to be 90% confident that the true result for this population is +/- 5% from the measured result; 95% confident that the true result is +/-6% from the measured result.
- ❖ Similarly, 550 observations allows us to be 90% confident that the true result is +/-3.5% from the measured result; 95% confident that the true result is +/-4% from the measured result.

### Respondent Locations



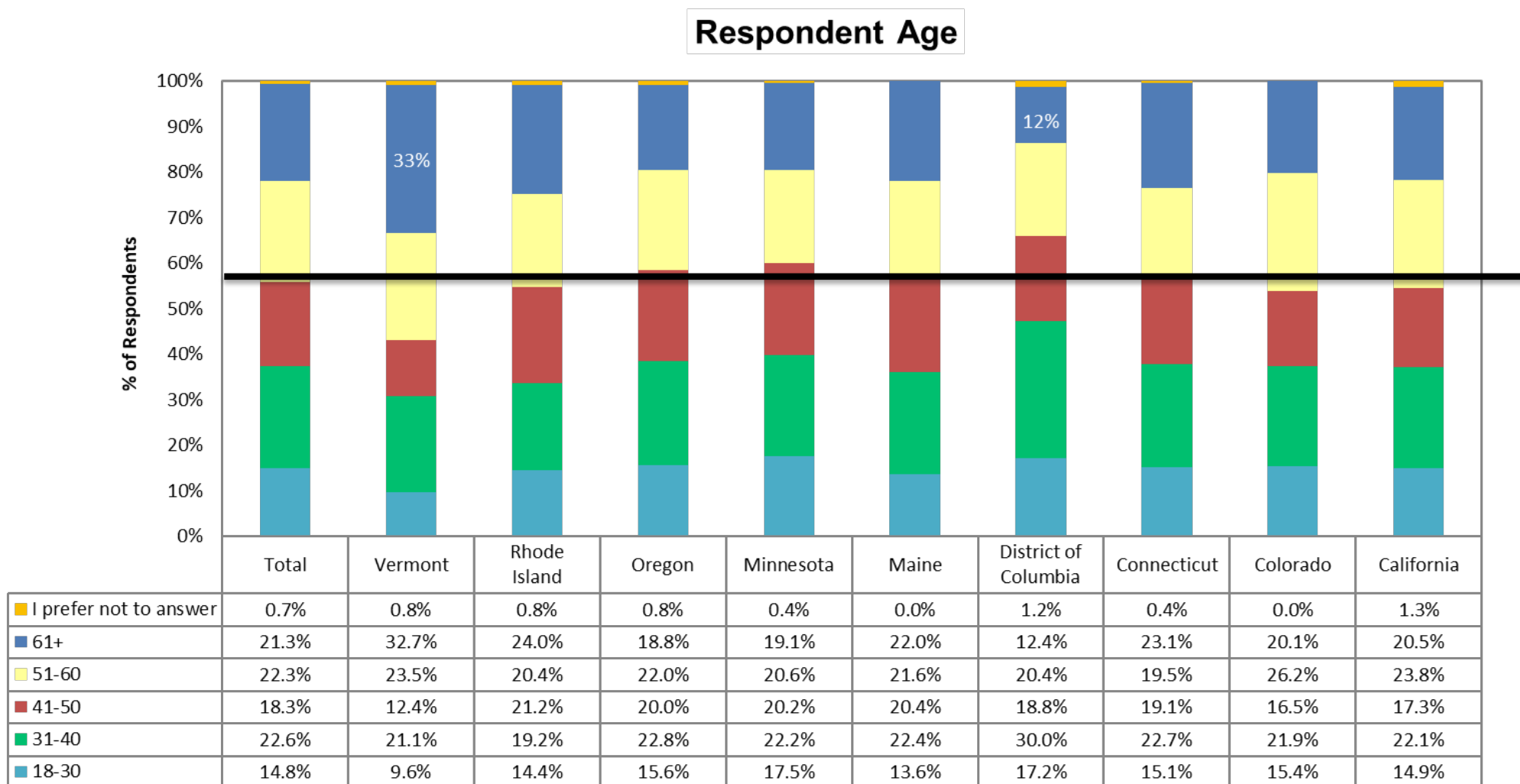
	Partial Surveys	Full Surveys	Total Surveys
California	42	542	553
Colorado	28	279	284
Connecticut	21	251	258
The District of Columbia	4	250	256
Maine	11	252	252
Minnesota	5	250	259
Oregon	12	250	252
Rhode Island	7	250	257
Vermont	6	251	255
Total	136	2575	2626

## RESPONDENT PROFILES



## Profile of Respondents - Age

- ❖ A good mix of age ranges were represented in each state's sample.
- ❖ Variances can be attributed to state characteristics. Based on census data, Vermont has the greatest proportion of 55+ residents; DC, the lowest—consistent with the survey respondent base.
- ❖ Note that all respondents were at least 18 years old.



## Profile of Respondents - Gender

- ❖ Roughly half of those surveyed were men; half, women.
- ❖ Very few declined to share this information or provided an “other” response.

### Gender Identity

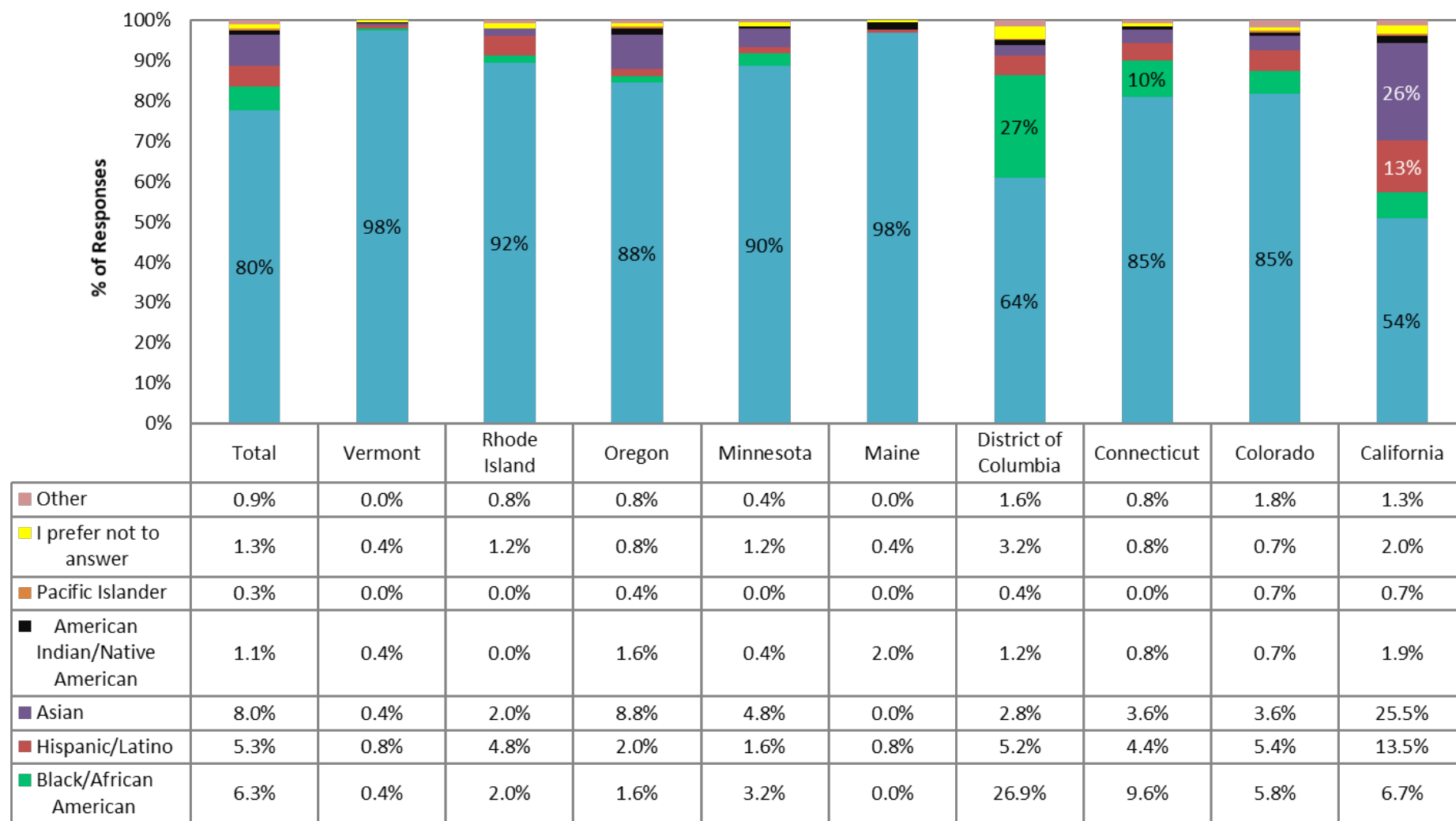


*\*Other: Gender Neutral*

## Profile of Respondents - Ethnicity

- ❖ About 80% of all respondents were Caucasian.
- ❖ However, there were variances within states/district, consistent with census data. California has a higher proportion of Hispanic and Asian residents. The District of Columbia and Connecticut have the highest African American populations.

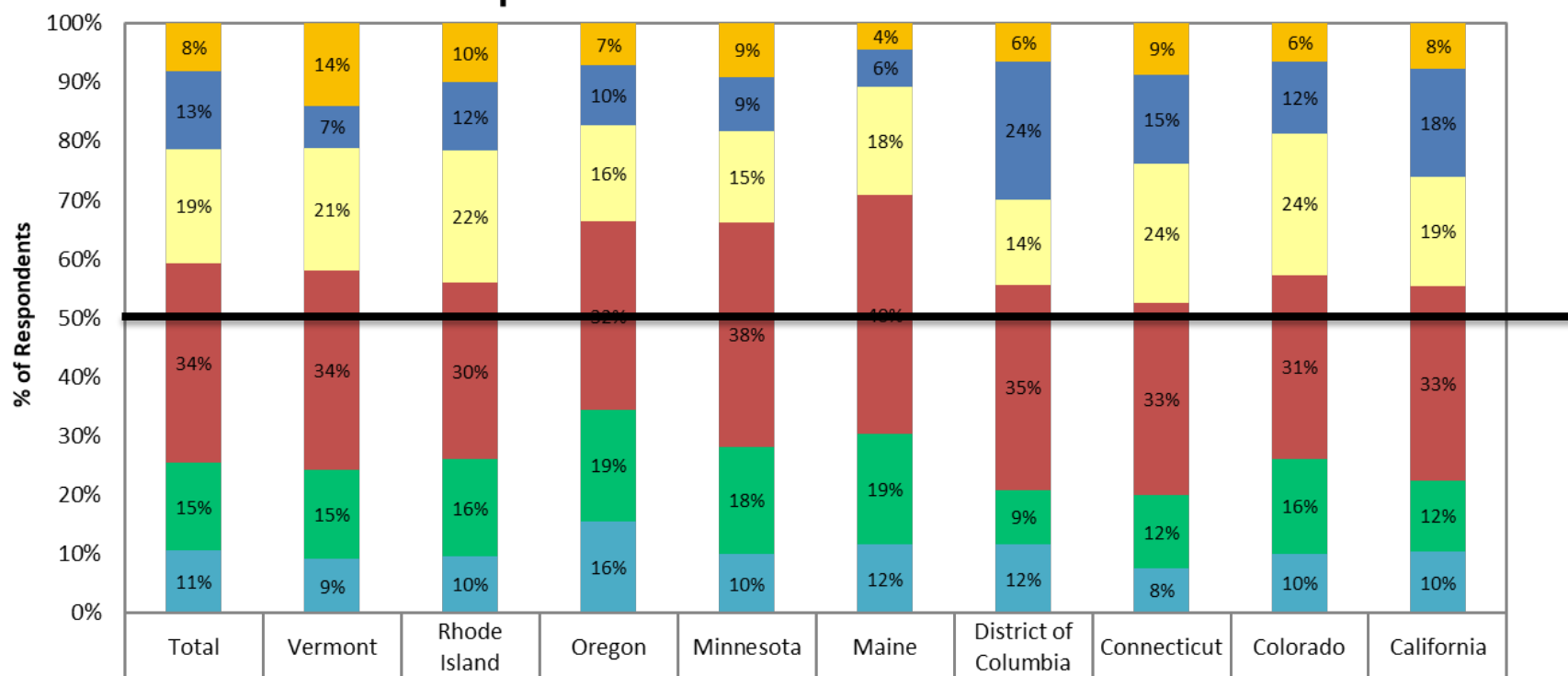
**Respondent Ethnicity**



## Profile of Respondents - Income

- ❖ The median household income level for respondents is \$50-99K in each state, consistent with census data.
- ❖ Median household income in the United States was \$62,450 in July 2018 (Sentier Research).

**Respondent Annual Household Income**

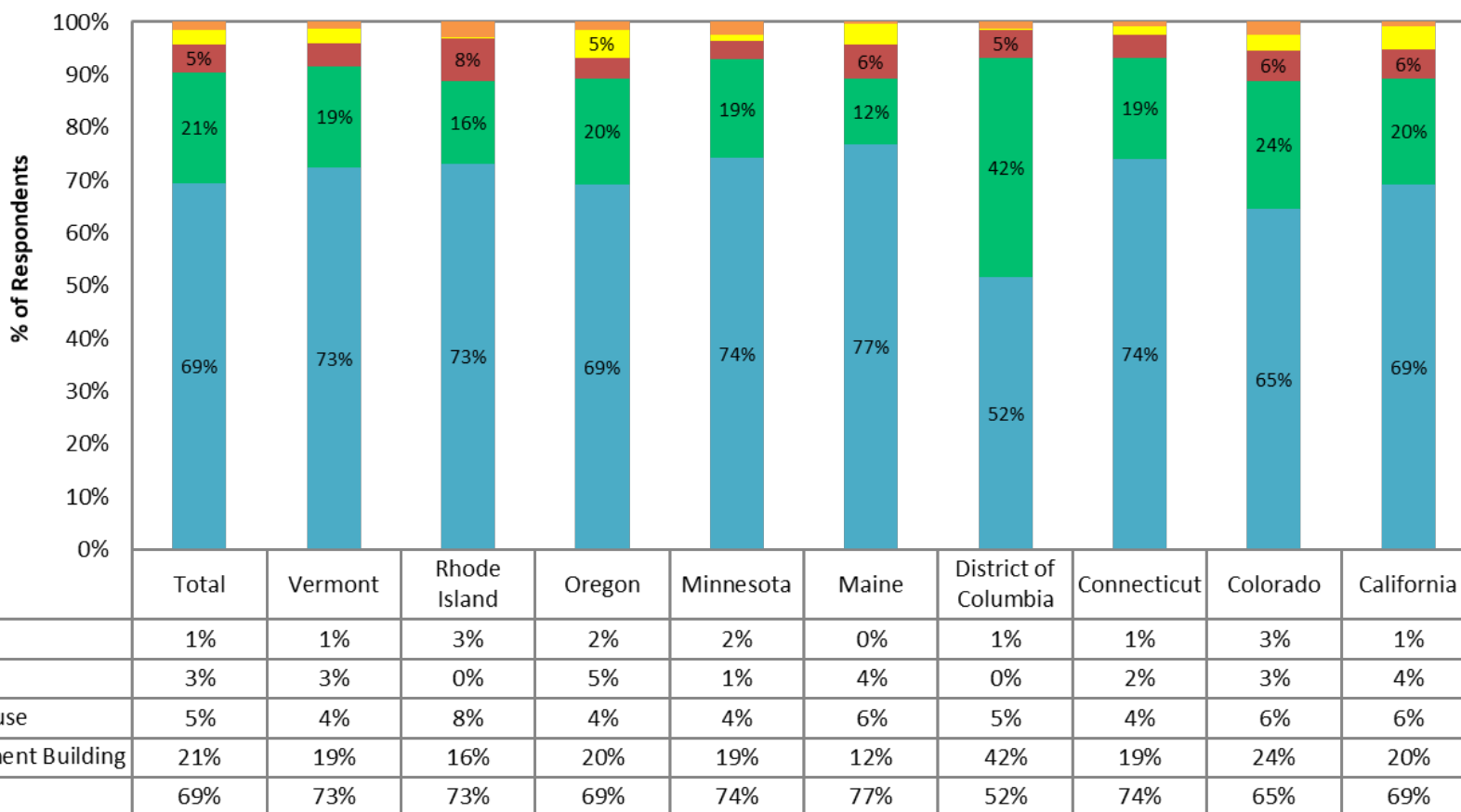


I prefer not to answer	8%	14%	10%	7%	9%	4%	6%	9%	6%	8%
More than \$150,000	13%	7%	12%	10%	9%	6%	24%	15%	12%	18%
\$100,000 to \$149,000	19%	21%	22%	16%	15%	18%	14%	24%	24%	19%
\$50,000 to \$99,999	34%	34%	30%	32%	38%	40%	35%	33%	31%	33%
\$25,000 to \$49,999	15%	15%	16%	19%	18%	19%	9%	12%	16%	12%
\$24,999 or less	11%	9%	10%	16%	10%	12%	12%	8%	10%	10%

## Profile of Respondents – Dwelling Type

- ❖ Most respondents live in a single family home.
- ❖ Condominium/apartment living was more predominant in Washington D.C. than in other parts of the country.

**Respondent Dwelling Type**

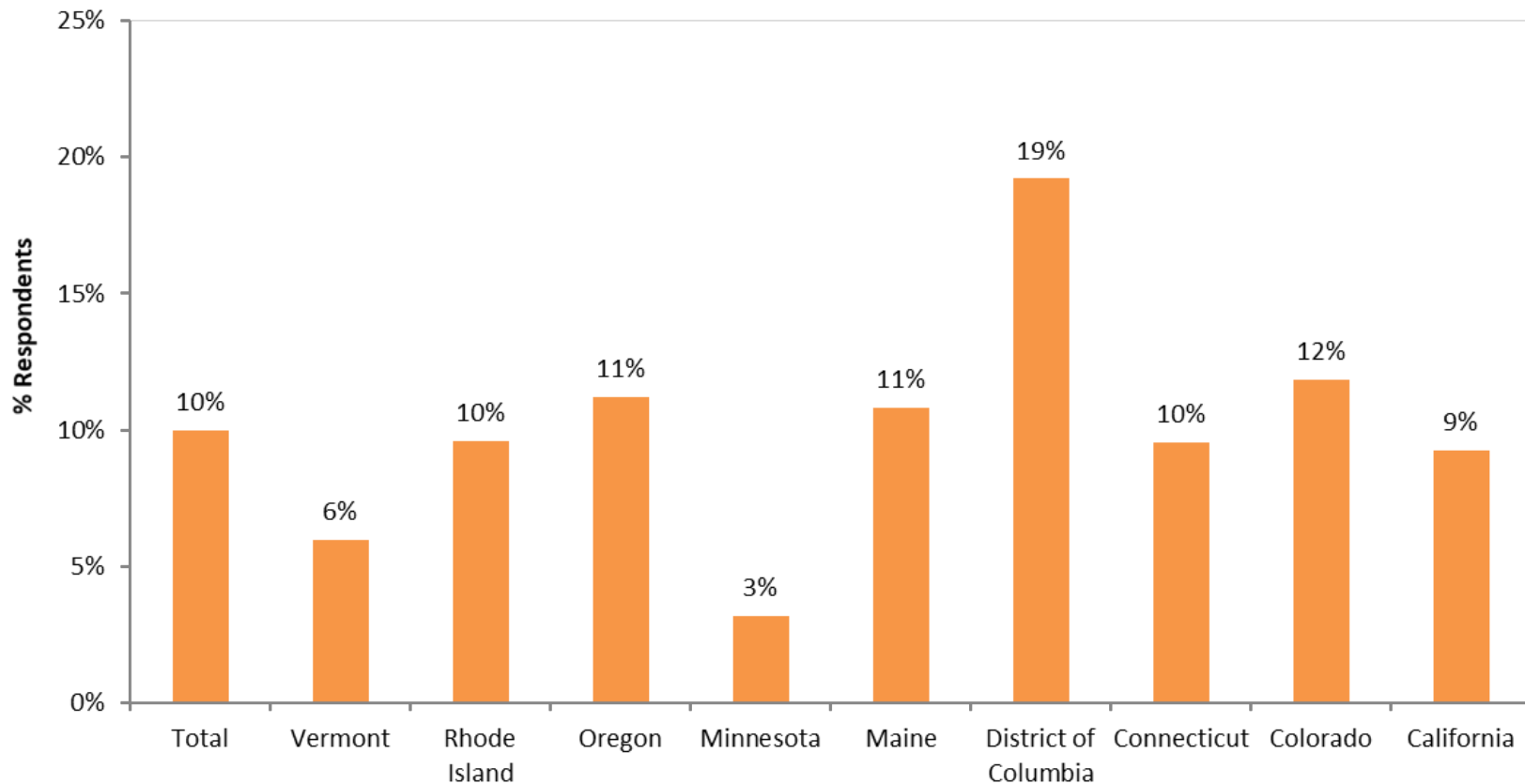


*\*Other: Townhome, Rent a Single Room, Dorm, Modular Home, Senior Home*

## Profile of Respondents – Paint-Related Profession

- ❖ About 10% of those surveyed said they painted professionally.
- ❖ There were significant variances between states, consistent with results from prior surveys.

***Do you paint professionally (as a painting contractor, property maintenance crew, etc. but NOT as an artist)?***





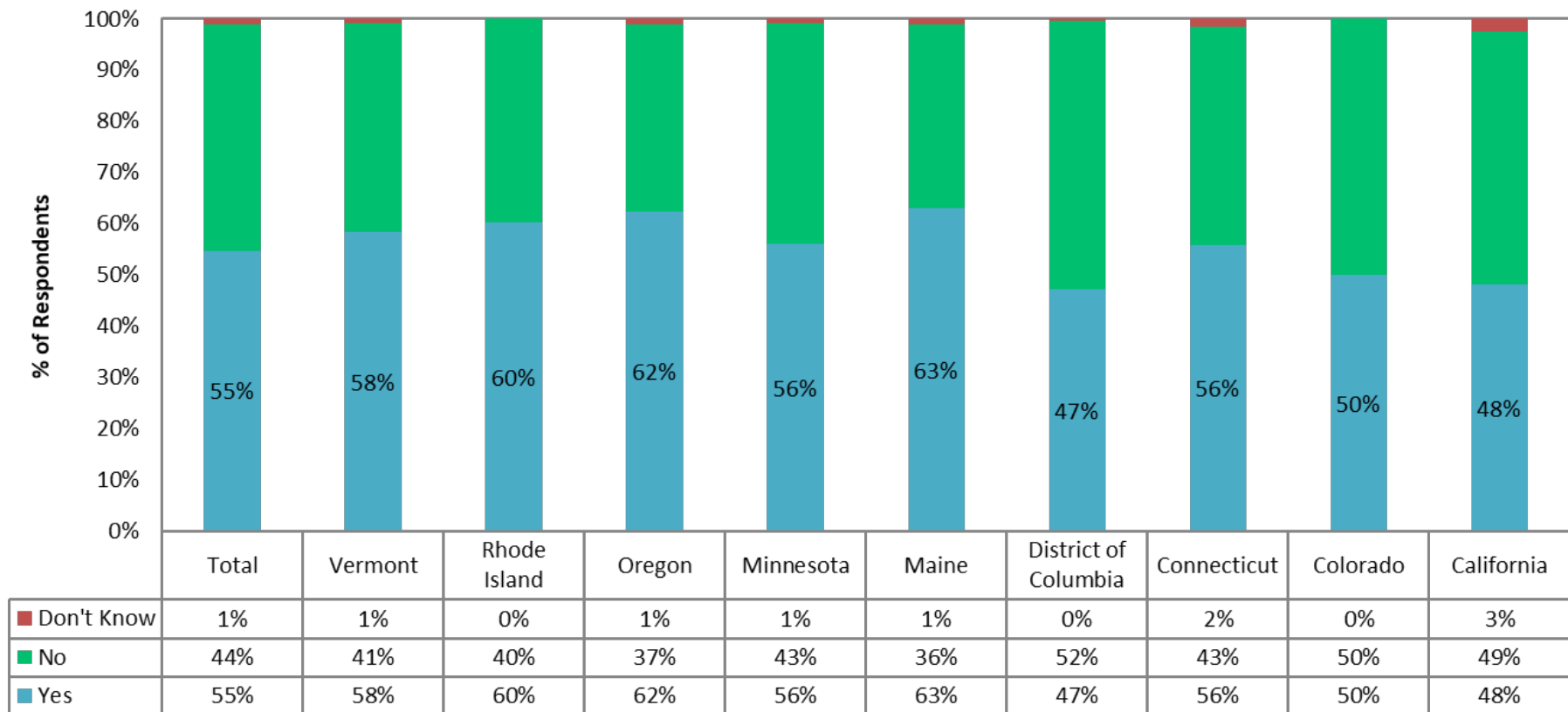
# CONSUMER BEHAVIOR PAINT PURCHASING AND DISPOSAL

## Recency of Paint Purchases

- ❖ Slightly over half of respondents bought paint in the last year.
- ❖ Results varied slightly by state. The fewest purchased paint in the last year in D.C.; the most, in Maine and Oregon.

### Have you purchased paint in the last year\*?

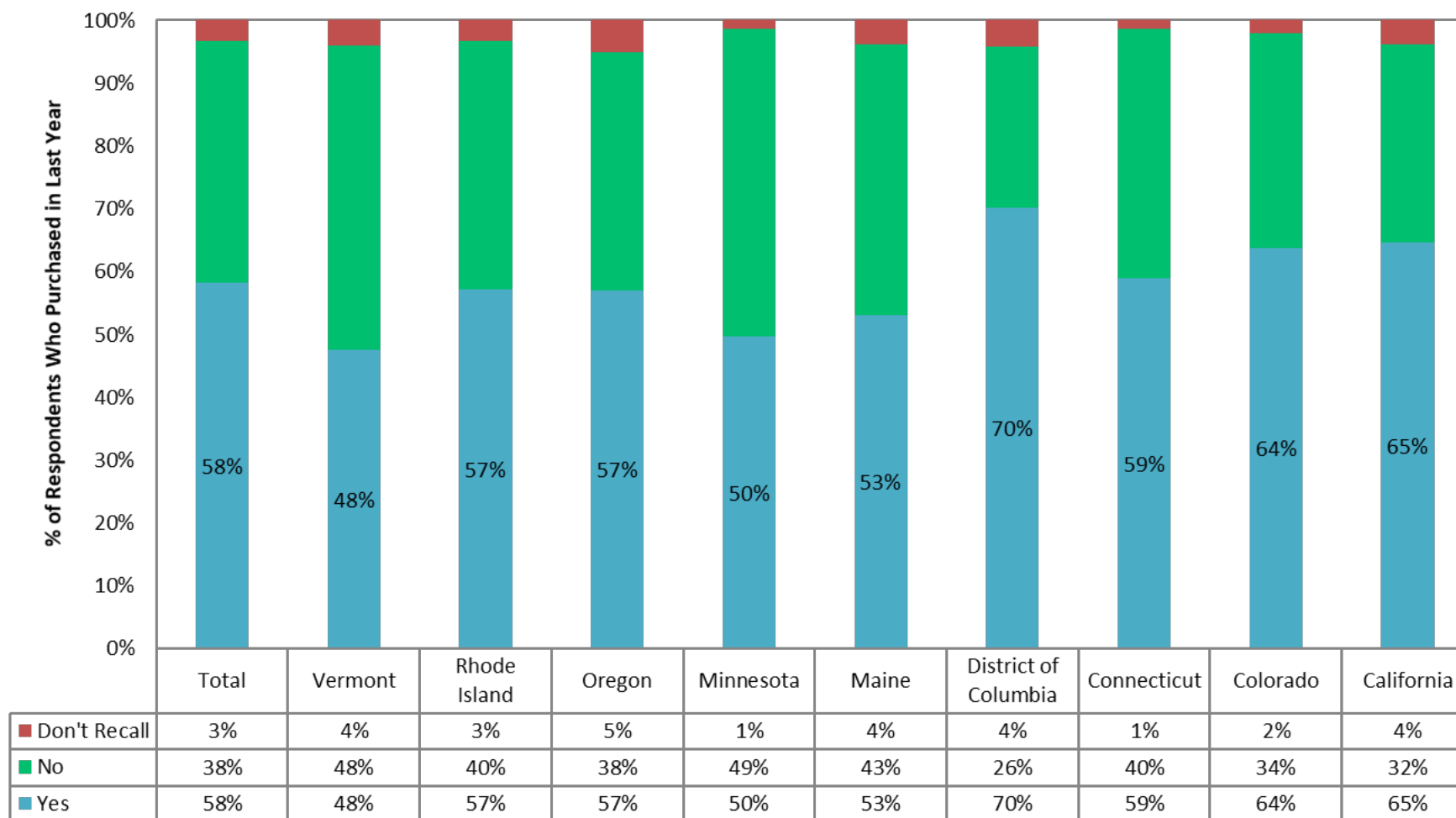
*\*For the purposes of this question, "paint" includes primer, interior or exterior house paint, stain, deck sealer, and clear finishes like varnish.*



## Measurements Prior to Paint Purchases

- ❖ 58% of respondents measured ahead of time to determine paint needs.
- ❖ The highest level of preparation occurred in D.C.; the lowest, in Vermont.

***Before purchasing, did you take any measurements of the area to be painted to figure out how much paint was needed for the project?***



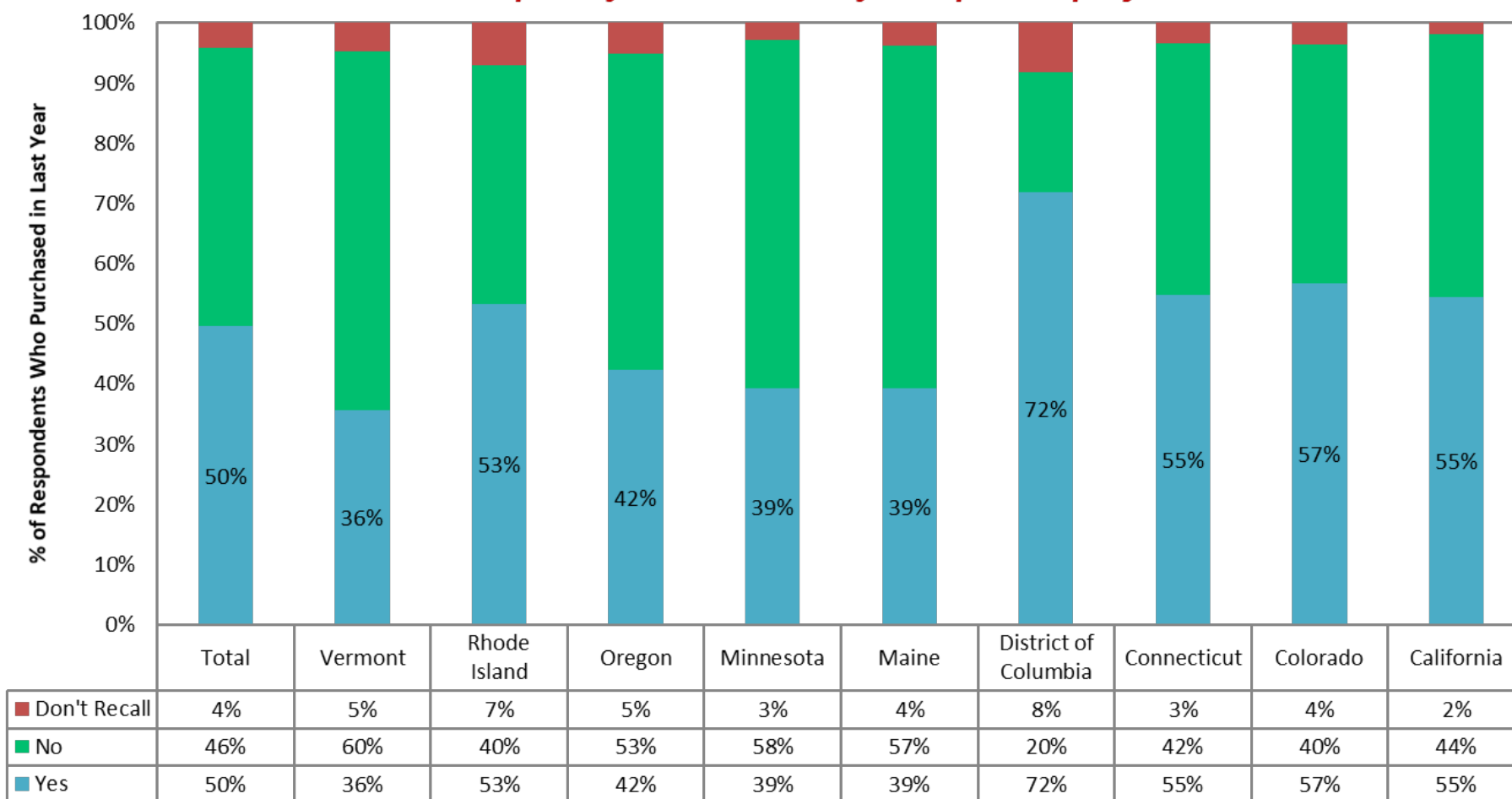
N=1434

KB Insights

## Paint Store Assistance

- ❖ About half the time, respondents said the paint store assisted them with determining paint needs.
- ❖ D.C. retailers are most involved in this process; Vermont, Maine and Minnesota retailers, the least involved.

***Did the staff of the paint retail store assist you with figuring out exactly how much paint you needed for your specific project?***

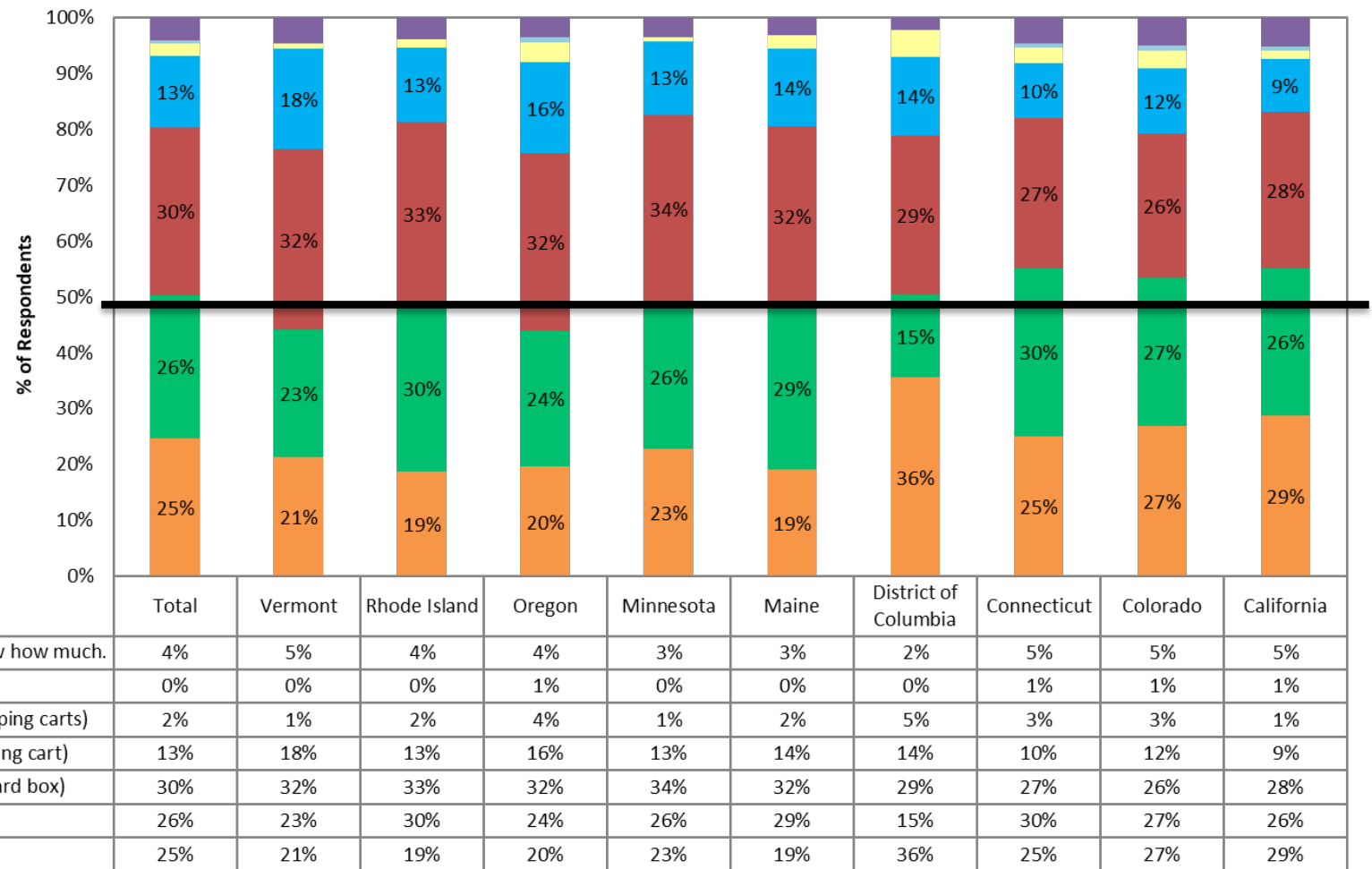


N=2626

# Leftover Paint

- ❖ The amount of paint stored at home varied considerably, from less than a gallon to a shopping cart full.
- ❖ The median response by state was either “less than 1 gallon” or “1 to 5 gallons.”
- ❖ Very few said they stored more than 15 gallons (two shopping carts full).

*How much leftover or unwanted paint do you have in your home or business at this time (e.g., primer, interior or exterior house paint, stain, deck sealer, or clear finishes like varnish)?*



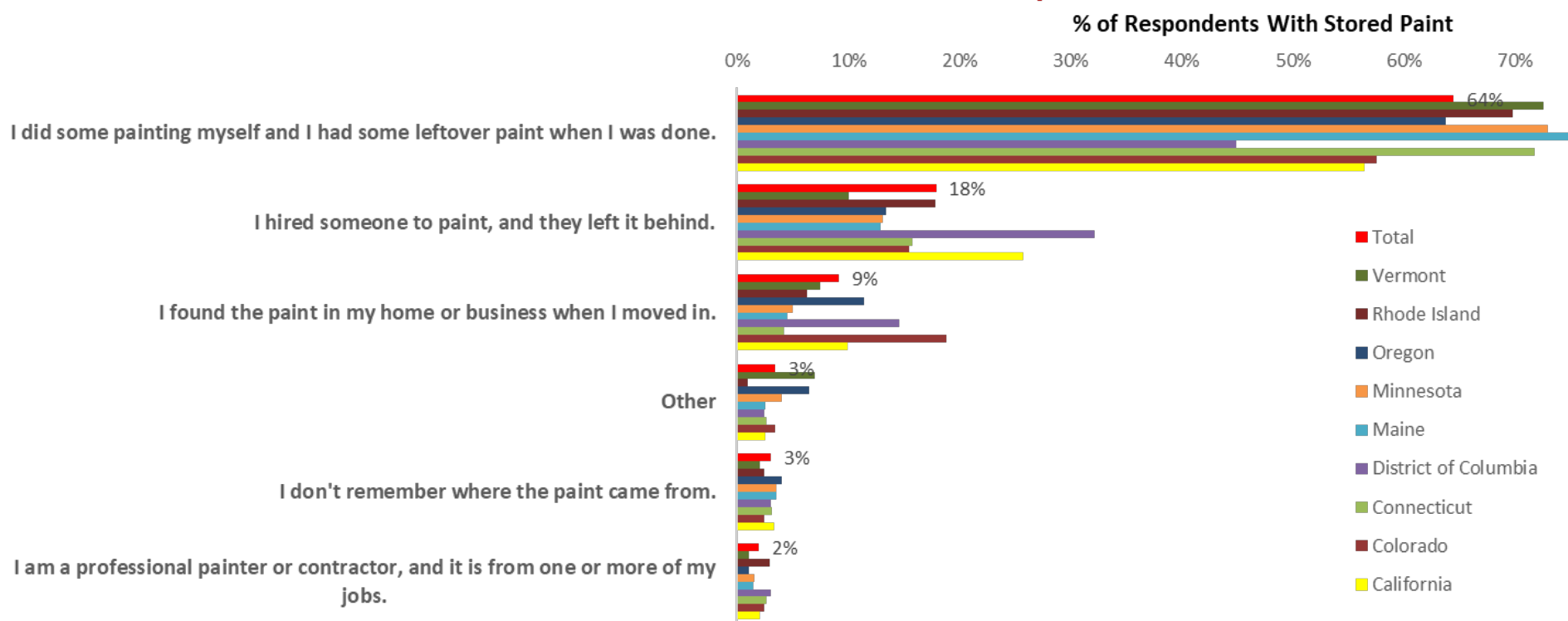
N=2615

KB Insights

# Reasons for Paint Storage

- ❖ The top 3 reasons that consumers store paint is the same in all states: leftovers from their own paint job, from a contractor's paint job, or left at move-in.

## Where did most of the paint come from?



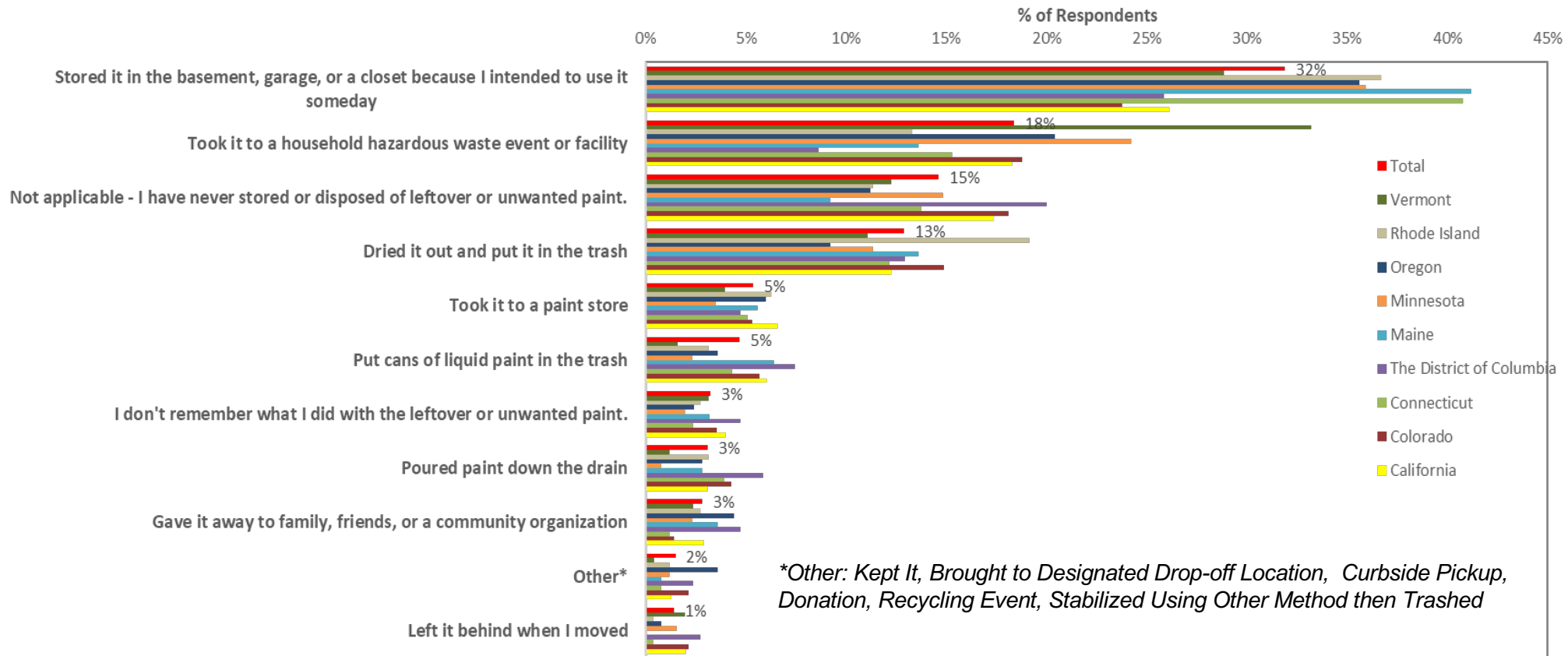
	Total	Vermont	Rhode Island	Oregon	Minnesota	Maine	District of Columbia	Connecticut	Colorado	California
I did some painting myself and I had some leftover paint when I was done.	64%	73%	70%	64%	73%	75%	45%	72%	57%	56%
I hired someone to paint, and they left it behind.	18%	10%	18%	13%	13%	13%	32%	16%	15%	26%
I found the paint in my home or business when I moved in.	9%	8%	6%	11%	5%	4%	15%	4%	19%	10%
Other	3%	7%	1%	6%	4%	2%	2%	3%	3%	3%
I don't remember where the paint came from.	3%	2%	2%	4%	4%	3%	3%	3%	2%	3%
I am a professional painter or contractor, and it is from one or more of my jobs.	2%	1%	3%	1%	2%	1%	3%	3%	2%	2%
Sample Size	1965	200	208	201	199	202	165	191	207	392

\*Other responses: Bought paint at retailer, brought from another dwelling, gifted by friend/relative

# Past Paint Disposal Methods

- ❖ Most people who keep paint intend to use it someday. Disposing at HHW facility & dry/trash method common.

*In the past, which has been your preferred method to dispose of leftover or unwanted paint?*

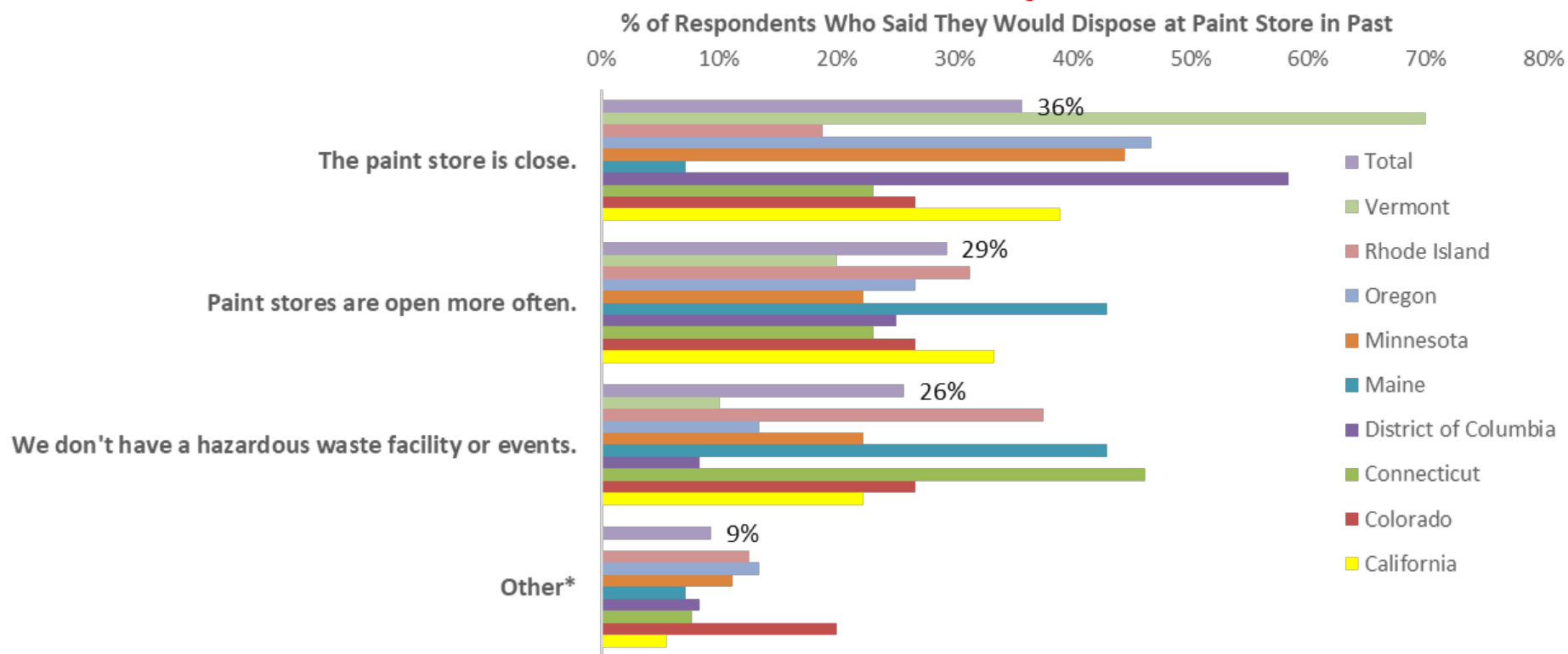


	Total	Vermont	RI	Oregon	Minnesota	Maine	DC	Connecticut	Colorado	California
Stored it in the basement, garage, or a closet because I intended to use it someday	32%	29%	37%	36%	36%	41%	26%	41%	24%	26%
Took it to a household hazardous waste event or facility	18%	33%	13%	20%	24%	14%	9%	15%	19%	18%
Not applicable - I have never stored or disposed of leftover or unwanted paint.	15%	12%	11%	11%	15%	9%	20%	14%	18%	17%
Dried it out and put it in the trash	13%	11%	19%	9%	11%	14%	13%	12%	15%	12%
Took it to a paint store	5%	4%	6%	6%	4%	6%	5%	5%	5%	7%
Put cans of liquid paint in the trash	5%	2%	3%	4%	2%	6%	7%	4%	6%	6%
I don't remember what I did with the leftover or unwanted paint.	3%	3%	3%	2%	2%	3%	5%	2%	4%	4%
Poured paint down the drain	3%	1%	3%	3%	1%	3%	6%	4%	4%	3%
Gave it away to family, friends, or a community organization	3%	2%	3%	4%	2%	4%	5%	1%	1%	3%
Other	2%	0%	1%	4%	1%	1%	2%	1%	2%	1%
Left it behind when I moved	1%	2%	0%	1%	2%	0%	3%	0%	2%	2%
Sample Size	2604	253	256	250	256	250	255	255	282	547

## Past Paint Store Disposal Preference

- ❖ Three reasons for disposing at a paint store are prevalent: location, hours and lack of HHW facility.

***What is the main reason you would take paint to a paint store instead of a household hazardous waste facility or event?***



	Total	Vermont	Rhode Island	Oregon	Minnesota	Maine	District of Columbia	Connecticut	Colorado	California
The paint store is close.	36%	70%	19%	47%	44%	7%	58%	23%	27%	39%
Paint stores are open more often.	29%	20%	31%	27%	22%	43%	25%	23%	27%	33%
We don't have a hazardous waste facility or events.	26%	10%	38%	13%	22%	43%	8%	46%	27%	22%
Other*	9%	0%	13%	13%	11%	7%	8%	8%	20%	6%
Sample Size	140	10	16	15	9	14	12	13	15	36

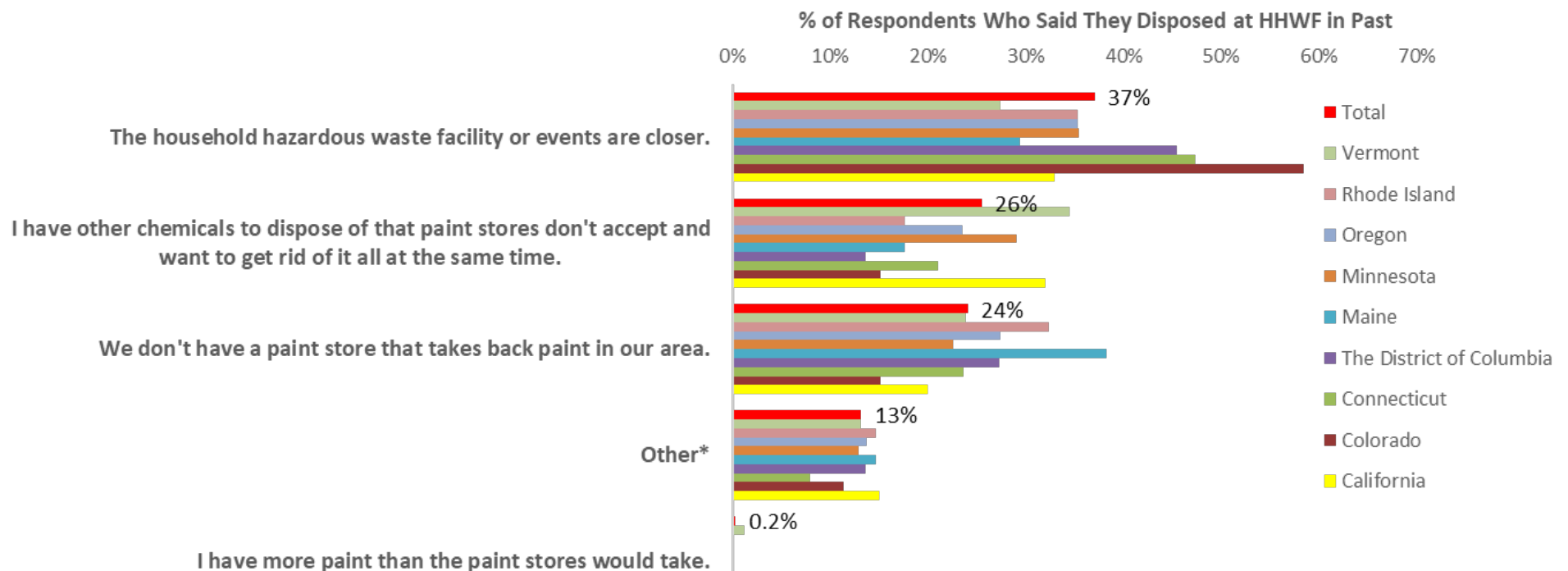
\*Other: Store Decides How to Dispose, Regular Hours, Charitable Giving, They Recycle, Refund



# Household Hazardous Waste Facility Disposal Preference

- ❖ In most states, the fact that the HHW facility/event is closer drives consumer preference.
- ❖ However, in Maine, many said there wasn't a paint store that takes back paint; in Vermont, the ability to handle "other" chemical disposal needs made a difference.
- ❖ Note: results should be interpreted directionally only as sample sizes are low.

## *What is the main reason you would take paint to a household hazardous waste facility instead of a paint store?*

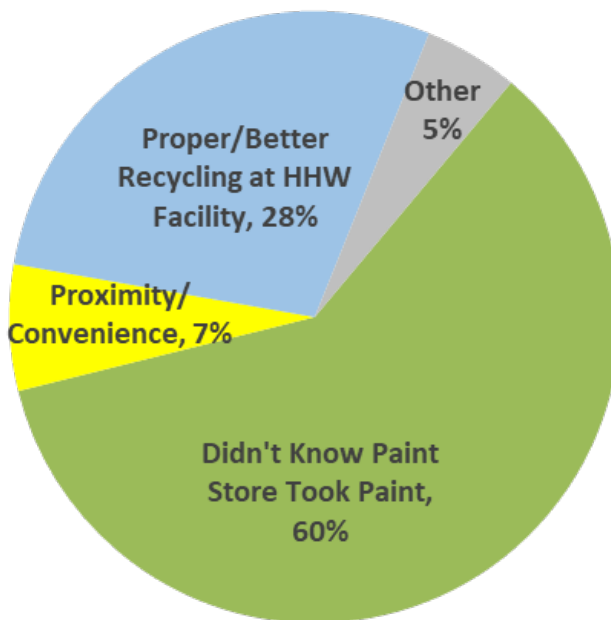


	Total	Vermont	Rhode Island	Oregon	Minnesota	Maine	District of Columbia	Connecticut	Colorado	California
The household hazardous waste facility or events are closer.	37%	27%	35%	35%	35%	29%	45%	47%	58%	33%
I have other chemicals to dispose of that paint stores don't accept and want to get rid of it all at the same time.	26%	35%	18%	24%	29%	18%	14%	21%	15%	32%
We don't have a paint store that takes back paint in our area.	24%	24%	32%	27%	23%	38%	27%	24%	15%	20%
Other*	13%	13%	15%	14%	13%	15%	14%	8%	11%	15%
I have more paint than the paint stores would take.	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Sample Size	478	84	34	51	62	34	22	38	53	100

## Household Hazardous Waste Facility Event Preference (continued)

- ❖ Comment categorization shows that many respondents simply were unaware that paint stores took paint for recycling.
- ❖ Others felt the HHW facility would use better recycling procedures.
- ❖ Note that these reasons should be added to the survey in 2019.

**Comment Categorization: Other Reasons  
Household Hazardous Waste Facilities are  
Preferred over Paint Stores**



*Sample Comments, Didn't Know*

Did not know paint store would take paint
didn't know paint stores took old paint
Didn't know they took old paint
I did not know paint stores would take it.
I didn't know that a paint store would take it
I didn't know a paint store would take back old paint
I didn't know paint stores accepted left over paint.
I didn't know that paint stores would take unused paint back.

*Sample Comments, Proper Recycling*

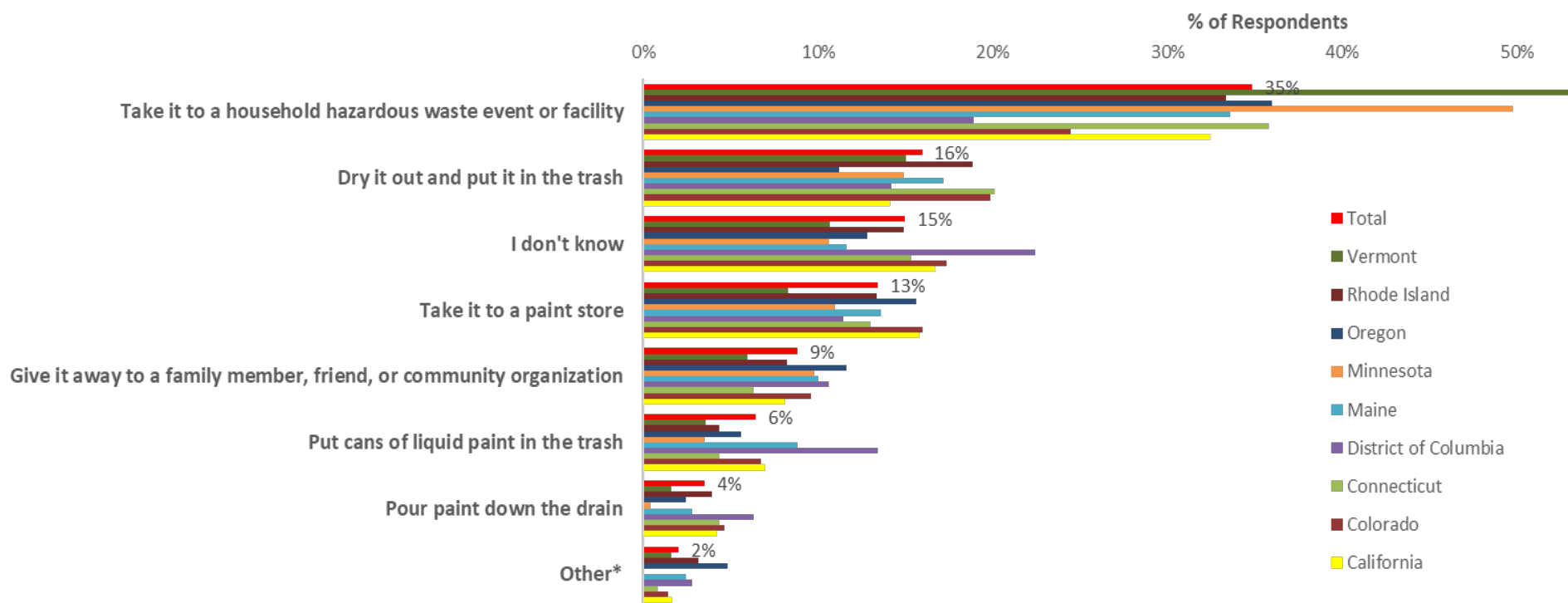
Proper disposal of hazardous material
I believe that is the best place to take the paint
this seems like the most responsible thing to do
its the best way to safely dispose of it
So that it will be disposed of properly.
I wanted it disposed of properly
It's the right thing to do!

N=60

# Future Paint Disposal Intentions

- ❖ The top method for future disposal in all states is taking it to a HHW event or facility.
- ❖ In most states, the dry it out/throw it away method is also prevalent.
- ❖ The three states where taking it to a paint store is cited most often: OR, CO and CA.

*If you wanted to get rid of unwanted paint in the near future, what would you most likely do with it?*

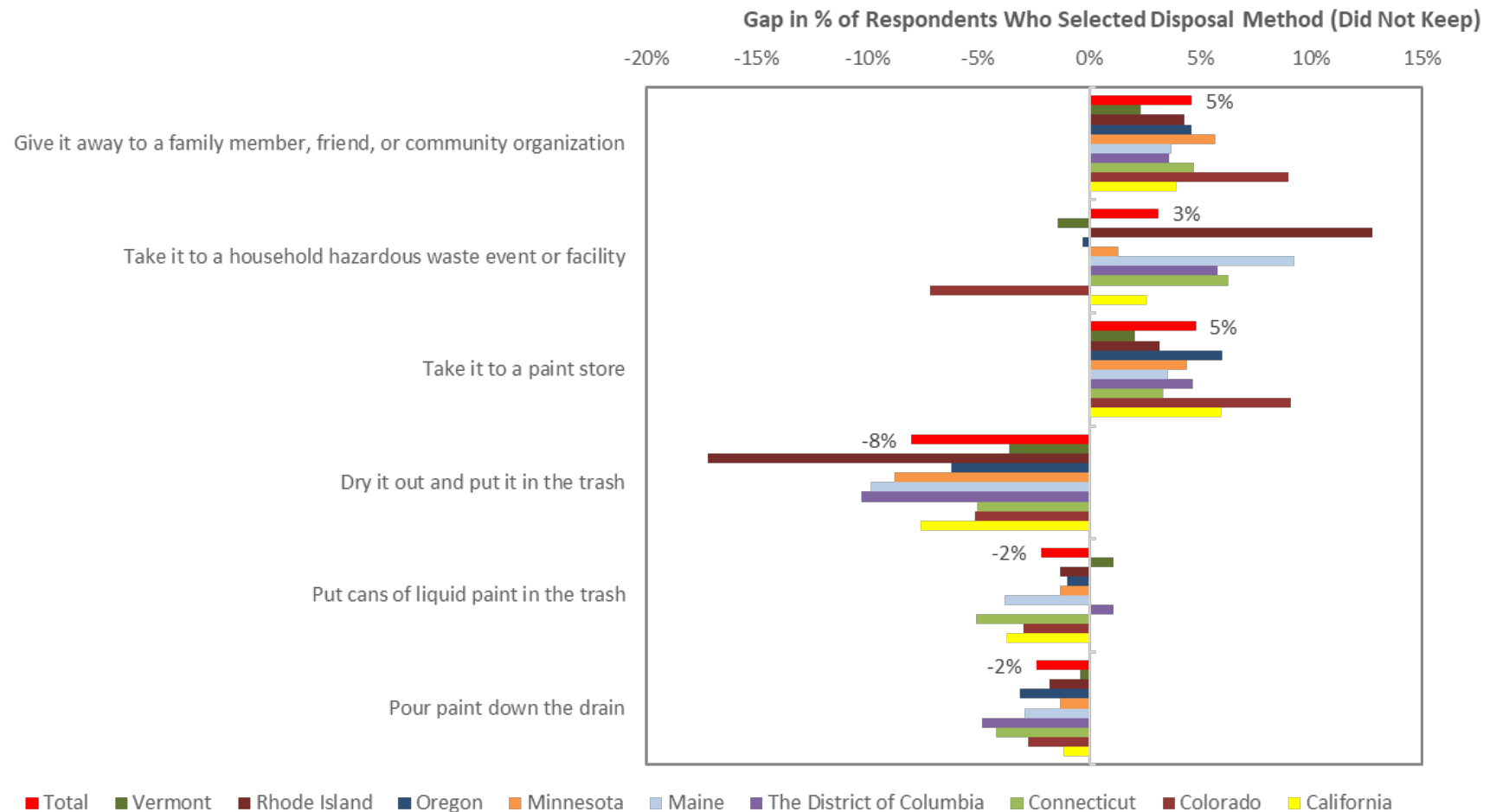


	Total	Vermont	RI	Oregon	Minnesota	Maine	DC	Connecticut	Colorado	California
Take it to a household hazardous waste event or facility	35%	53%	33%	36%	50%	34%	19%	36%	24%	32%
Dry it out and put it in the trash	16%	15%	19%	11%	15%	17%	14%	20%	20%	14%
I don't know	15%	11%	15%	13%	11%	12%	22%	15%	17%	17%
Take it to a paint store	13%	8%	13%	16%	11%	14%	11%	13%	16%	16%
Give it away to a family member, friend, or community organization	9%	6%	8%	12%	10%	10%	11%	6%	10%	8%
Put cans of liquid paint in the trash	6%	4%	4%	6%	4%	9%	13%	4%	7%	7%
Pour paint down the drain	4%	2%	4%	2%	0%	3%	6%	4%	5%	4%
Other*	2%	2%	3%	5%	0%	2%	3%	1%	1%	2%
Sample Size	2598	253	255	250	255	250	254	254	282	545

## Trend: Past Disposal Behaviors to Future Disposal Intentions

- ❖ All indicators show that there is a shift occurring to greener disposal methods.
- ❖ Fewer consumers will throw away or pour paint down the drain in the future.
- ❖ More consumers will repurpose or recycle old paint in the future.

### Gap Analysis: Past vs. Future Paint Disposal Methods

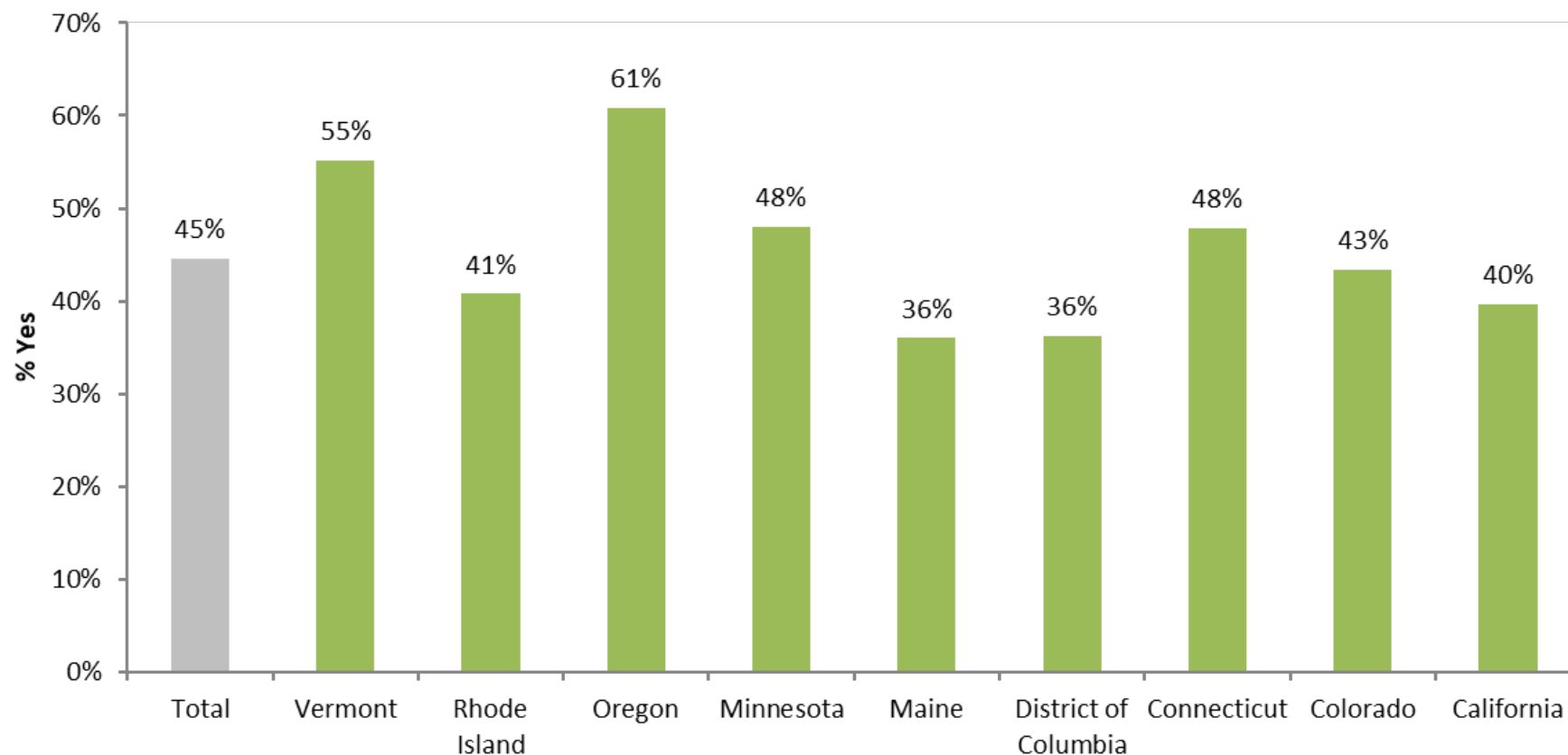


# PAINT RECYCLING AWARENESS/ENGAGEMENT

## Awareness of Paint Recycling

- ❖ Surprisingly, less than half of respondents knew that paint could be recycled.
- ❖ There are some states where knowledge is greater, such as Oregon and Vermont.
- ❖ The areas where knowledge is lowest are Maine and the District of Columbia.

***Prior to this survey, did you know that paint can be recycled?***

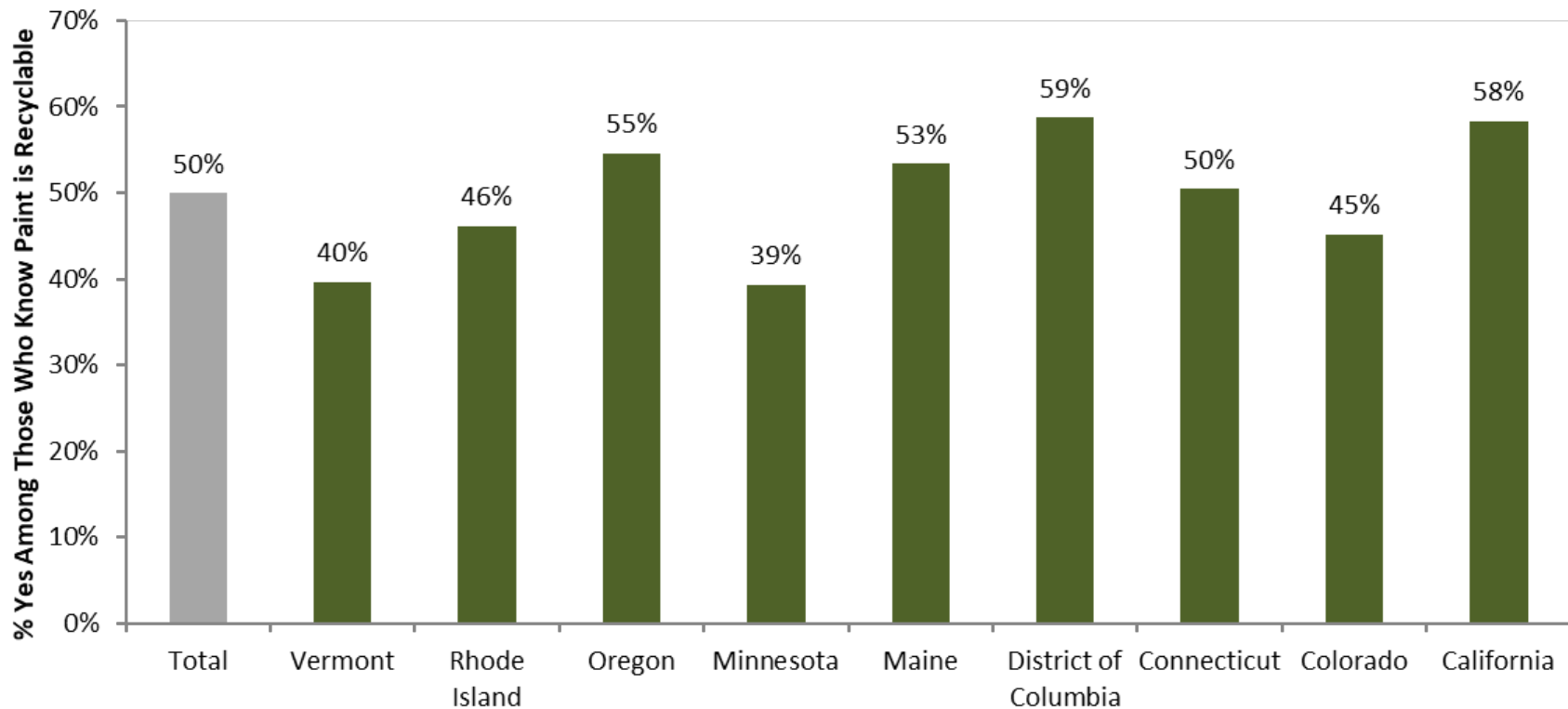


N=2594

## Awareness of Fee Among Those Who Knew About Recycling

- ❖ Those who are aware that paint can be recycled are not necessarily aware of the nuances of how it works. Only half of these respondents knew that there was a recycling fee added to paint purchases.
- ❖ Some states showed greater than average awareness, such as California and D.C.

***Are you aware that when you buy paint in (STATE), there is a small fee added to the price to pay for a program to recycle any leftover paint you have?***

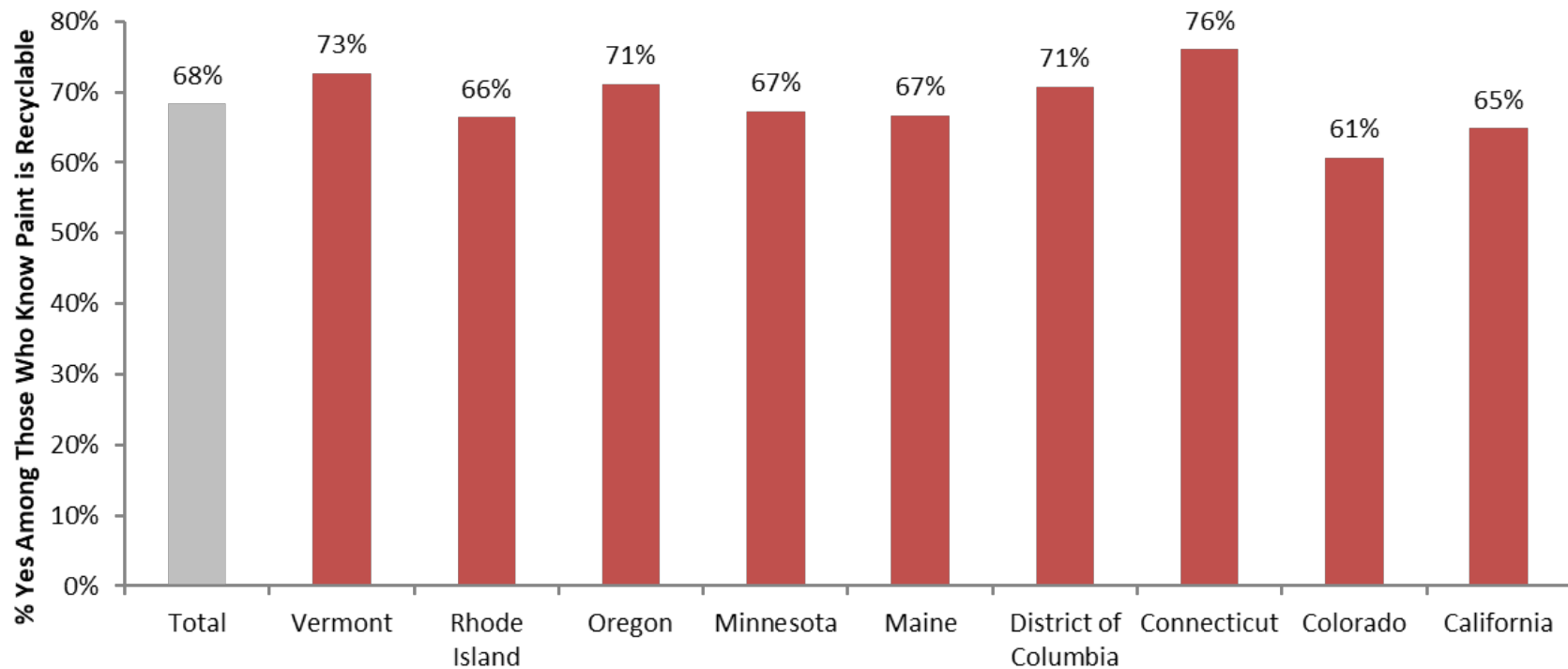


N=1158

## Awareness of Places for Recycling Among Those Who Knew

- ❖ More than two thirds of respondents who were aware of paint recycling said they knew where to take old paint to be recycled.
- ❖ The strongest results were in Connecticut and Vermont.

*If you wanted to take paint somewhere to be recycled,  
do you know where to take it?*



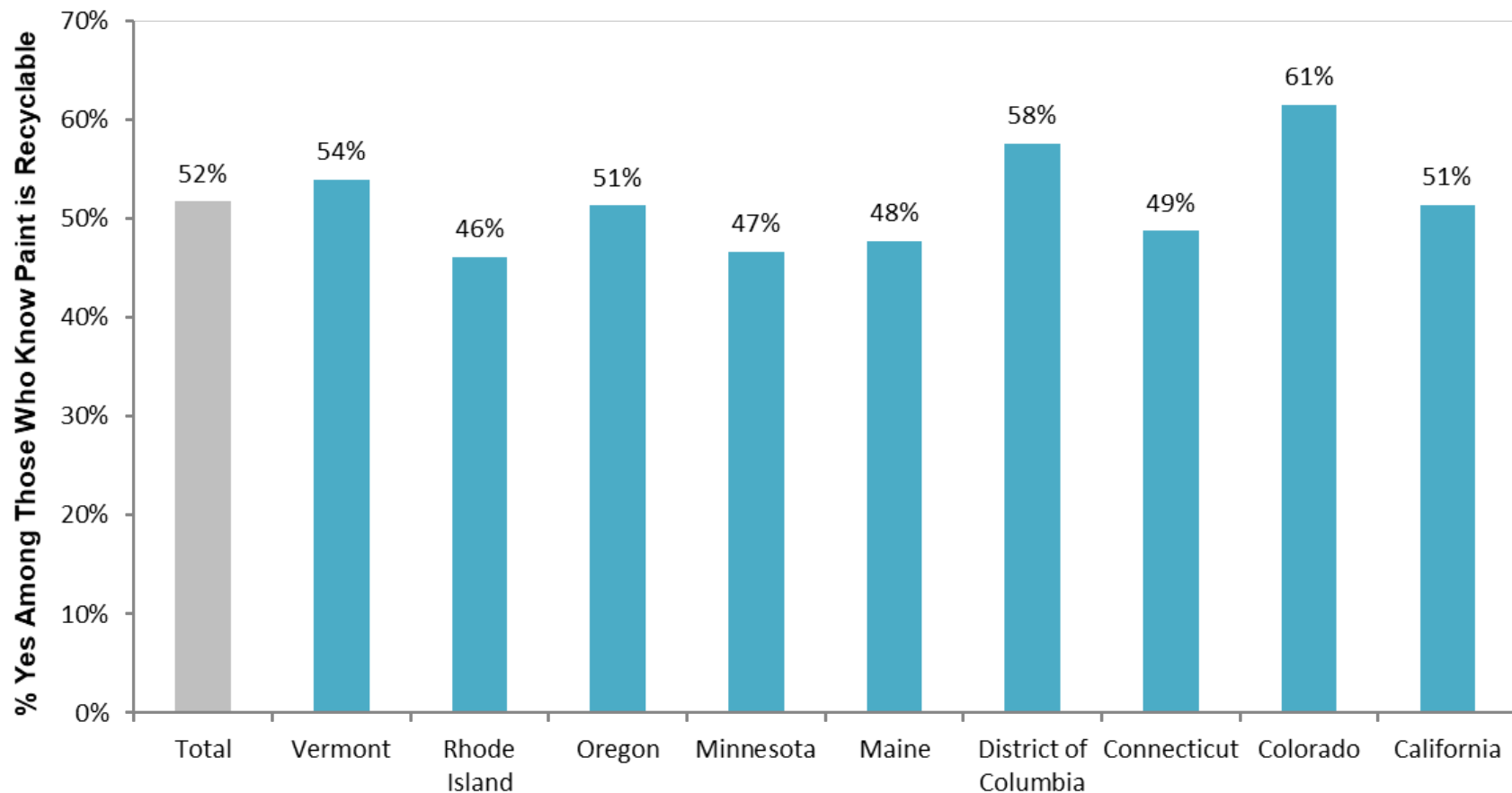
N=1158



## Past Recycling Behaviors Among Those Who Knew

- ❖ About half of those who said they were aware that paint can be recycled said they had done so in the past.
- ❖ The strongest recycling behaviors are in Colorado and DC.

*Have you ever taken paint somewhere to be recycled?*

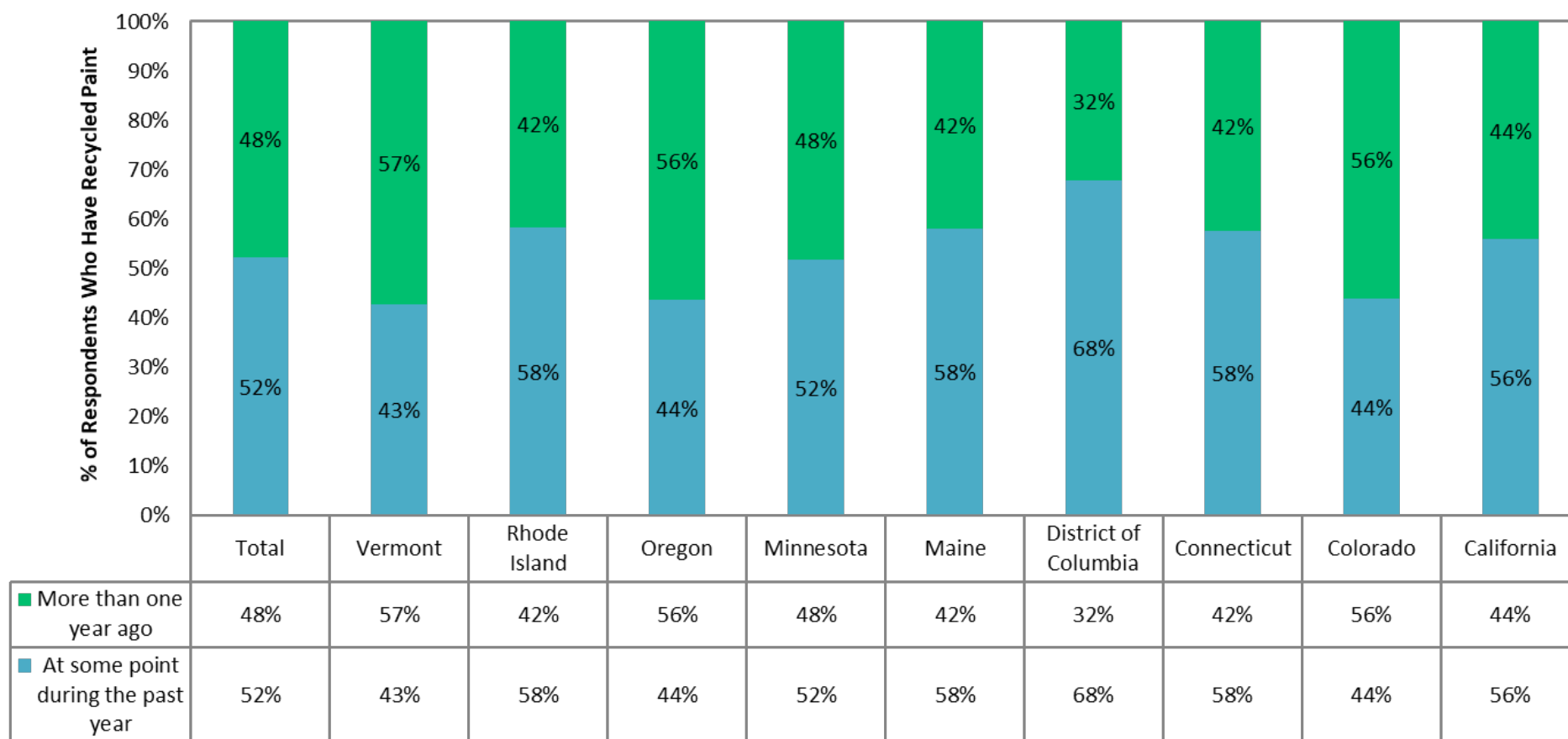


N=1158

## Recency of Paint Recycling

- ❖ About half of those who said they had recycled paint in the past said they had done so in the last year.

*When was the most recent time you have taken paint somewhere to be recycled?*

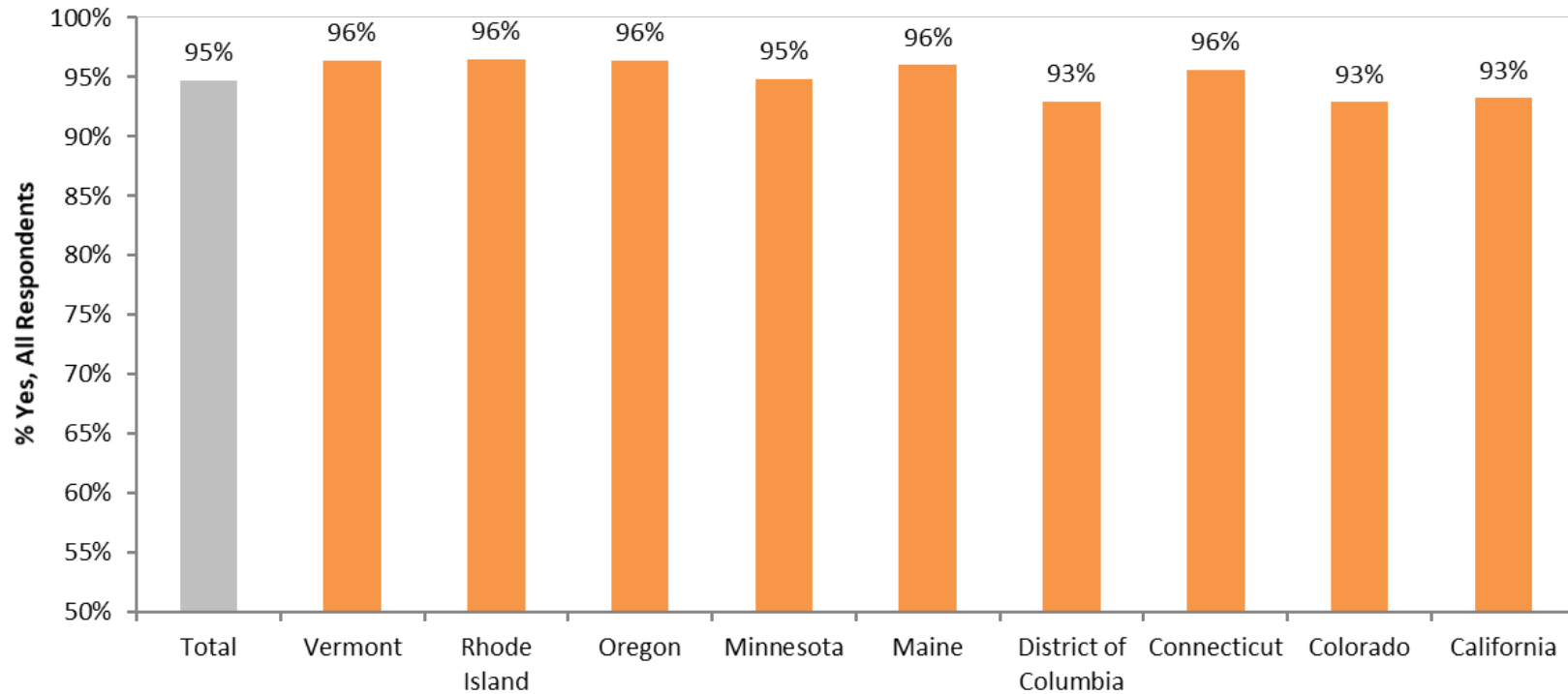


N=598

## Opportunity for Future Paint Recycling

- ❖ Almost everyone surveyed said they would consider recycling leftover paint in the future.

### *Would you consider recycling leftover paint in the future?*



N=2592

## Open-Ended Commentary: Recycling Motivations

Q18 What would be your personal motivation for recycling your leftover paint in the future?

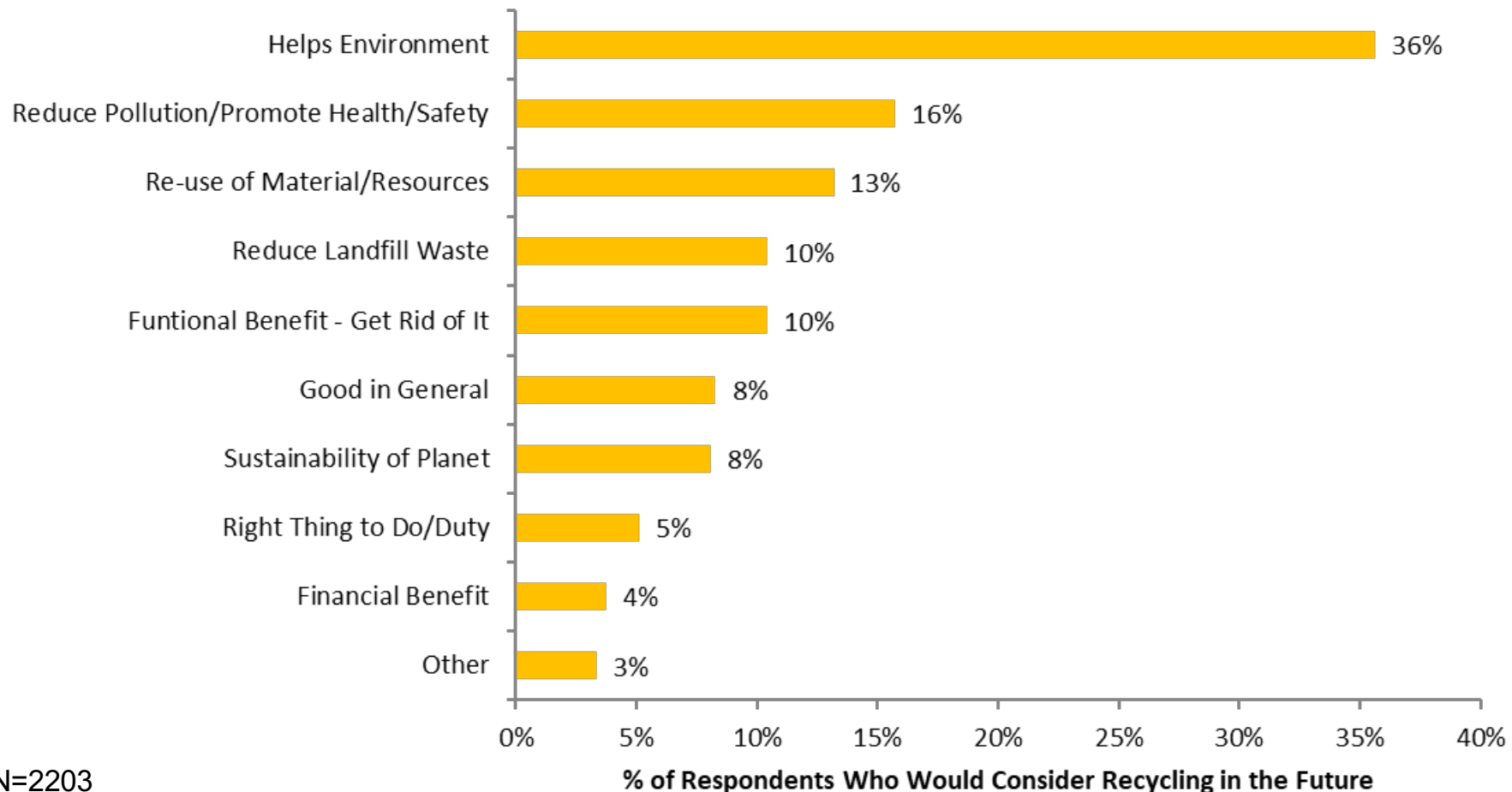
A word cloud of responses to the question 'What would be your personal motivation for recycling your leftover paint in the future?'. The words are arranged in a roughly rectangular shape, with larger words indicating higher frequency. The colors are various shades of blue and teal. The words include:

recycle everything put will basement pollute one dispose properly way rid  
reduce waste possible save planet might recycling paint space  
enviroment disposal house recycle much way world don t throwing  
landfill NA save hazardous waste Save environment  
believe recycling need future reuse seems clean think help  
Environmental concerns know try recycle right thing way dispose  
rid money help environment save earth waste  
place recycle go better environment  
harm environment environment's good wasteful  
use throwing away paint Keep landfill Environmental  
protect  
safe way environment best safe sure want  
trash keep green thing right None s better dispose left earth water  
someone use help someone planet garage easy care environment  
make Reduce Safety feel keep environment much possible go waste  
protect someone better enviroment Less waste yes take hazardous less  
environmentally conscious anything environmentally friendly

## Comment Categorization: Recycling Motivations

- ❖ The top motivation to recycle is to help the environment.
- ❖ Other important motivations include the reduction of pollution, promotion of health, conservation of resources, reduction of waste, and simply getting rid of unwanted clutter in the home.

### ***Comment Categorization: What would be your personal motivation for recycling your leftover paint in the future?***



N=2203

KB Insights

## Sample Comments: Reasons to Recycle

### Helps Environment

Be environmentally responsible

feel better about not hurting the environment

i like to protect the enviroment

I try to recycle as much as possible for environmental reasons

Less strain on environment

Recycling is good for the environment.

well, I usually combine my leftovers and use all of it; however, if I wasn't going to do that, I would recycle for the environment's sake

I re cycle aluminum cans,plastic bottles,glass,cardboard so I do recycle some items. I care about the environment especially wildlife.

better for the environment than disposing of it

if it's the more environmentally friendly option

In order to maintain a safe environment for my family, myself, the community and future generations.

### Reduce Pollution/Promote Health

I want to keep as many toxic chemicals out of the environment as possible to avoid harm to animal and plant life.

I worry about the environmental impact that residual paint could have if I didn't recycle.

It's bad for the environment so would want it to be destroyed properly

Safe for the environment

to do the right thing and not pollute

To have a smaller imprint on the earth.

There are many chemicals in paint and I would want to be responsible to the environment

To keep it out of the water stream.

help to not contaminat the enviornment

to make us helathier

Because it is good to do and healthy and conservative

## Sample Comments: Reasons to Recycle

### Reuse of Materials/Resources

It would help someone else

My personal motivation for recycling paint would be to have the earth have less trash and make the paint into something useful.

Safe. No waste. Helps someone else.

so it can be used again instead of going in the trash

reuse, purpose, recycle is my mantra. Giving to the hazard material disposal site is last resort

I care about the environment and use of resources, also my children's future.

Because I recycle everything that I know can be recycled and if paint is possible to be recycled then I'd love to do my part for our planet.

hopefully it gets used a second time instead of wasting it

I like to recycle everything that I can. I don't feel that we respect our Earth enough and we need to do everything that we can do to protect it

Knowing someone else can put it to use

saves making new paint.

try and save on natural resources

### Reduce Landfill/Waste

It wouldn't go to a landfill and hurt the environment

Avoiding adding toxic material to land fill

Its poison in the ground

It's poison and we can't put it in the trash or landfills.

Less of a garbage foot print in the world

There is enough trash already.

To be less wasteful

To help minimize how much waste is put into our landfills.

Helps with the waste & keep things clean

Pouring it down the drain would ruin my septic system. I think it's wrong to put it in the trash

## Sample Comments: Reasons to Recycle

<b>Funtional Benefit - Ged Rid of It</b>
I would love to get rid of it knowing it didn't damage the environment!
For a better environment and a better way to get rid of paint
Decluttering my house, being environmentally friendly
Environmentally safer and de-clutters my house
Clear out clutter in the basement and garage
dont need it anymore
GET RID OF CAN AND OLD PAINT
get rid of it
I would not have to store it
no personal motivation except to get rid of it
to be safe and not have anything toxic left in house
To get rid of it and do so responsibly

<b>Sustainability of the Planet</b>
save the environment
Better for the earth. Recycling is always a sustainable practice
I love to recycle and save the planet
I prefer green options so as to make the world a better place. I have to live in it, as do my children and grandchildren.
I really believe recycling benefits our planet!
Making our world clean again.
Recycling is useful for maintaining our planet
help for the world preservation
stop killing planet
Ease of recycling the paint and knowing I am helping the planet.



## Sample Comments: Reasons to Recycle

### Right Thing to Do/Duty

It is the right thing to do.

It's just the proper thing to do (as opposed to throwing it out)

Just seems like the right thing to do

Seems better than trashing it.

Responsible disposal

do my npart for recycling

Right thing to do

Not being a jerk

### Financial Benefit

If u can recycle it at no cost

It would be a little cheaper.

money back

some money back

that THEY Recycle it to make fresh paint that's cheaper in price .

Money back

Incentives

A Reward.

Someone could possibly get a discount for recycled goods.

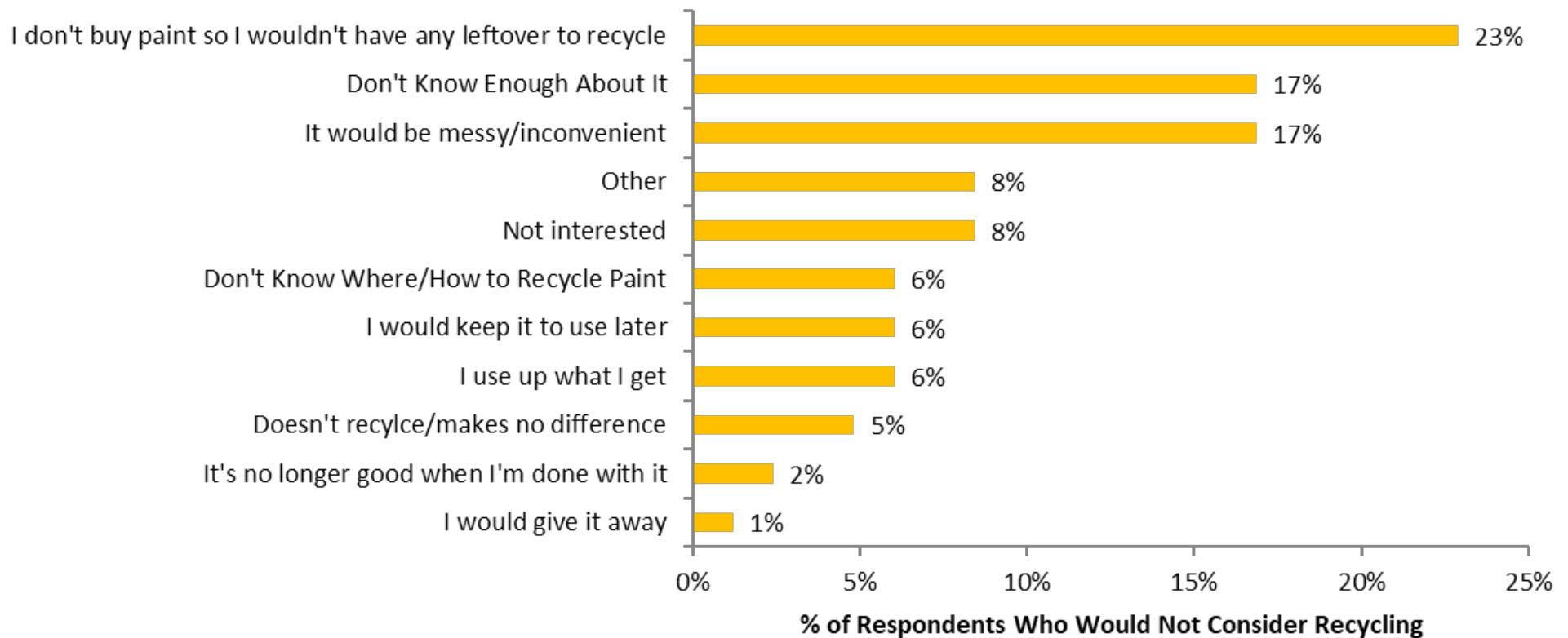
cost

Money

## Comment Categorization: Objections to Recycling Paint

- ❖ About a quarter of those who would not consider recycling simply don't buy paint.
- ❖ Interestingly, a significant percentage say they just don't know enough about it (opportunity).
- ❖ Others are concerned about the mess/trouble they'd have to go through to recycle.
- ❖ Still others say they would do something different with the leftovers.
- ❖ Note: low sample size.

### *Comment Categorization: Why wouldn't you consider recycling leftover paint in the future?*



N=83

KB Insights

## Sample Comments: Reasons NOT to Recycle

### Do Not Buy Paint

don't have any to recycle

Because I don't buy paint

don't do any painting so no paint

I do not plan on using paint to recycle

I don't anticipate buying paint - I live in an apartment and see that continuing for the foreseeable future.

Por q en estos momentos no tengo ninguna pintura puede q en un futuro la pueda tener pero ahora no

### Don't Know Enough

Didn't know

don't know paint can be recycled

I did not know this service is available.

like in a recycling bin? that doesn't make sense. seems like the safest place for such chemicals is at the haz waste drop off location.

no idea

the paint recycling center that I know of is about 45 minutes away. However, from this survey, I wonder if I can bring it to a paint store? That would be great to know! I would recycle if it were that easy

### Messy/Inconvenient

It seems messy

Not worth the effort and mess

pain in the a\*\*

to much of a hassle

too much hassle to go drop it off

## Sample Comments: Reasons NOT to Recycle

### Not Interested/Doesn't Recycle

I don't care

I do not think most people would be interested in recycle paint.

Not interested

Because my husband doesn't believe in recycling

doesn't make any difference

dont like recycling

### Doesn't Know How/Where to Recycle

I don't know where.

I'd forget to actually do it, or how to do it

inconvenient locations

Not sure wheee to go

Not sure where to take it

### Would Keep and Reuse Later/Give Away

because I'd keep it to use later

I can always use it later

I ONLY THROW IT OUT ONCE IT HAS AGED BEYOND USE

I plan to use any leftover paint on another project

Save until walls dirty and stain then can be make up

I want to give it to my family.

### Use What I Get

Bc i use what i get

Because I will only purchase what I need, therefore there wouldn't be a need to recycle.

I will use it so I don't need to dispose of it.

# CROSS-TABULATIONS: CONSUMER BEHAVIOR, AWARENESS, AND ENGAGEMENT

## Cross-Tabulations for Better Understanding

- ❖ In order to understand how to better approach consumers of different profiles, it is important to look at behaviors/awareness by group...

Objective	Related KPI/Measurement
Increase knowledge of paint recycling	<i>Do you know that paint can be recycled?</i>
Impact paint recycling behaviors	<i>Have you ever taken paint somewhere to be recycled?</i>
Decrease storage of paint in home	<i>Do you currently have any leftover or unwanted paint in your home or business (e.g., primer, interior house paint, stain, deck sealer, or clear finishes like varnish)? If so, how much paint do you have?</i>
Increase knowledge of PaintCare	<i>Have you ever ever heard of PaintCare, the program that sets up sites that take paint for recycling?</i>
Execute memorable ads	<i>Do you recall seeing an advertisement for PaintCare in the last several months?</i>
Stimulate word of mouth and other communications	<i>Do you recall hearing about PaintCare in any of the following other ways?</i>

*Gender*

*Age*

*Ethnicity*

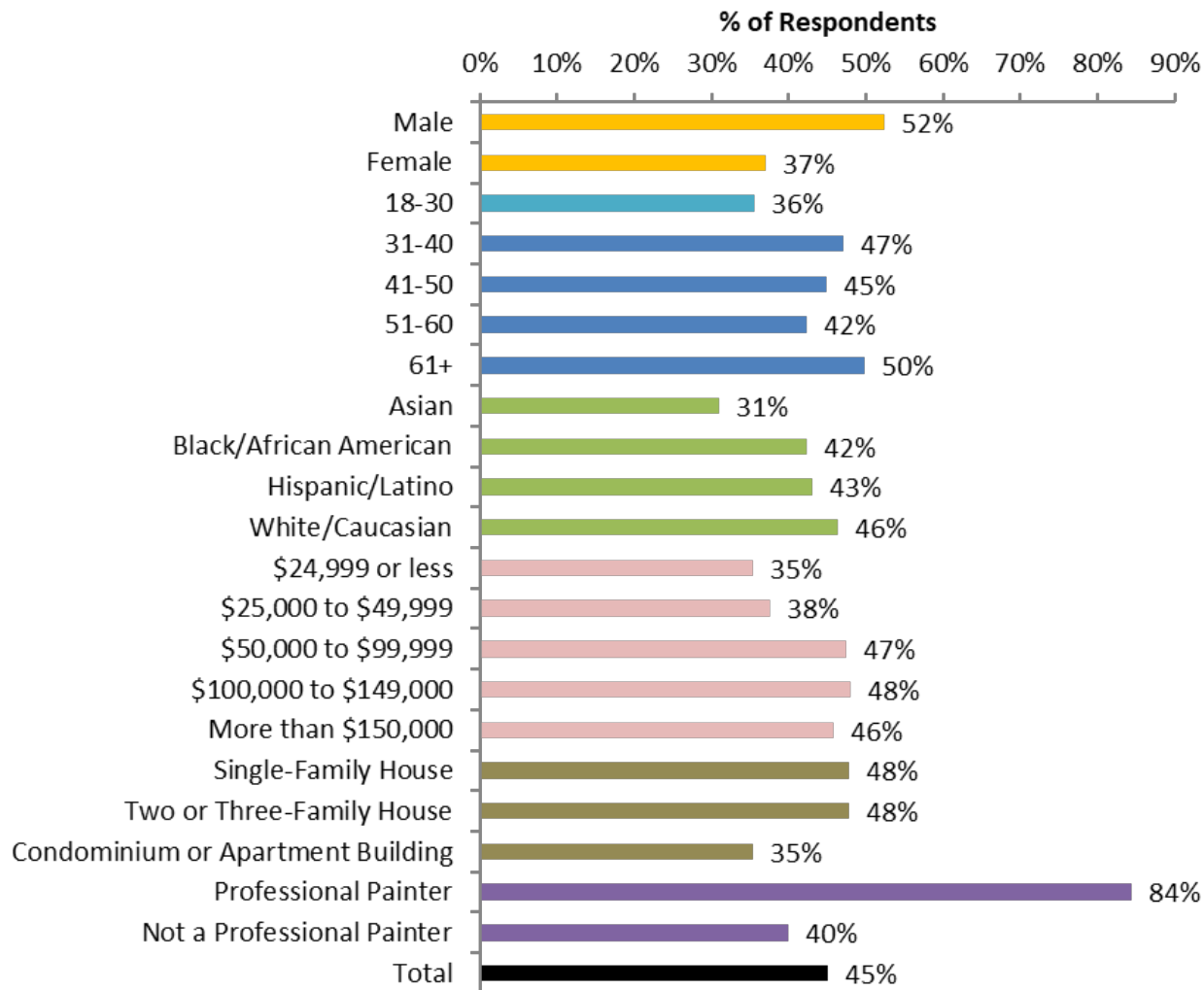
*Income*

*Dwelling Type*

*Profession*

# Cross-Tabulations on Key Performance Indices

## Knew Paint Was Recyclable

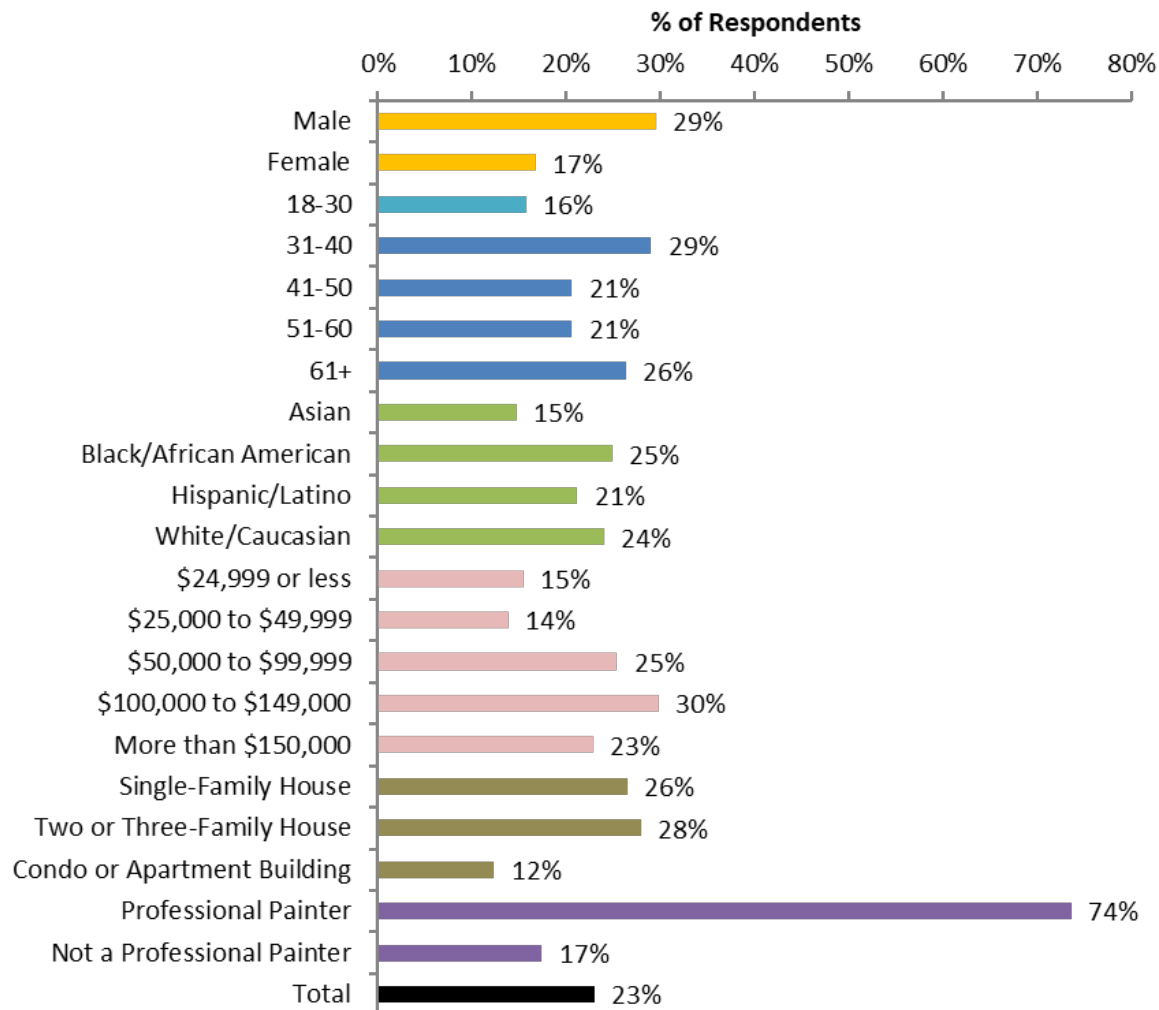


- ❖ Significantly fewer women know that paint can be recycled than men.
- ❖ The youngest respondents were least knowledgeable; differences were not significant over 30.
- ❖ Asians were least familiar with paint recycling; all other ethnicities were similar.
- ❖ Those with incomes \$50K or higher were most knowledgeable about paint recycling (likely corresponds with home ownership).
- ❖ Those living in condos were least familiar.
- ❖ The majority of professional painters are aware that paint can be recycled; more than twice the percentage of the general public.

*N=range from 136 to 2318 by category*

# Cross-Tabulations on Key Performance Indices

## Has Recycled Paint Before (adjusted)



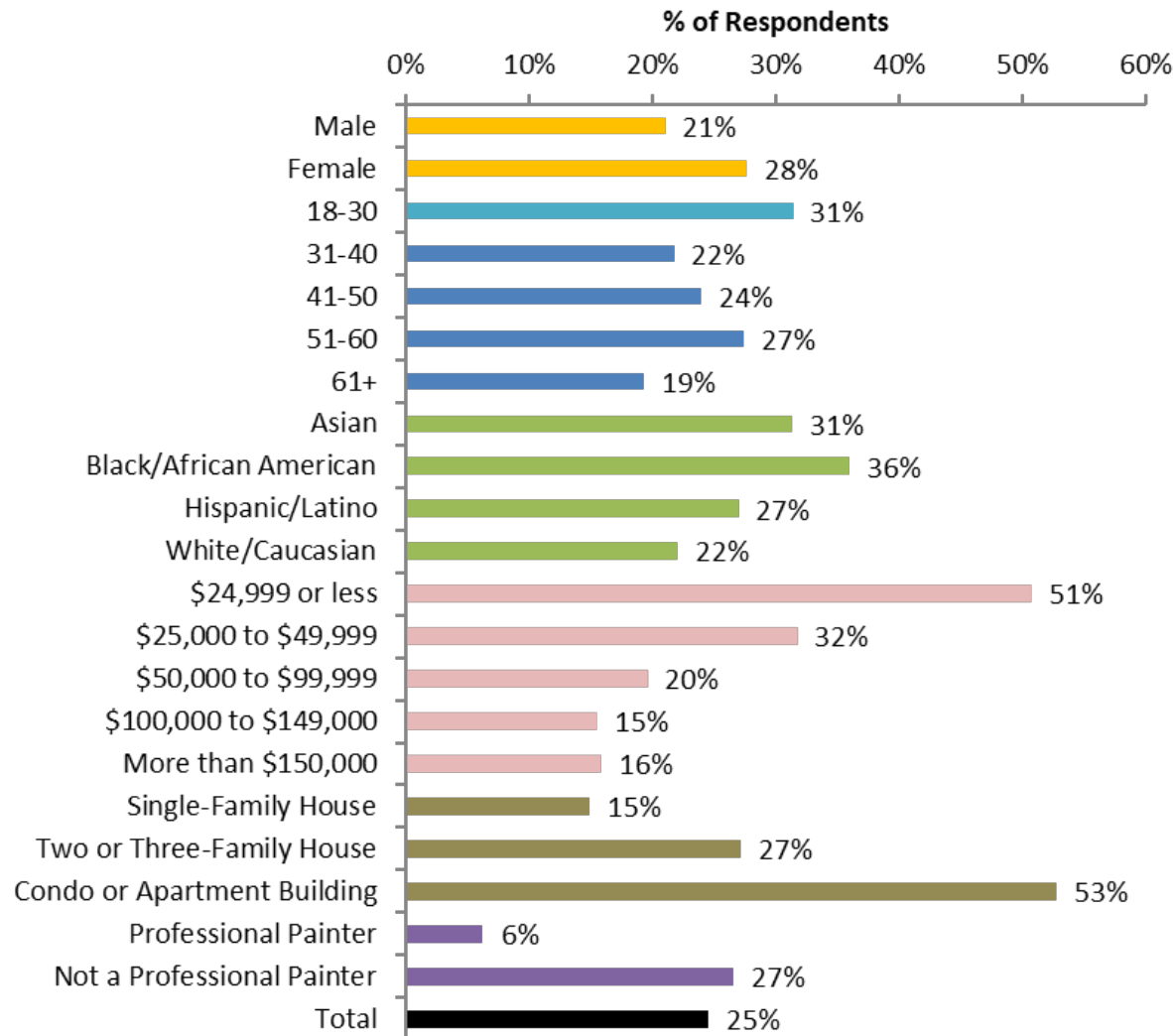
- ❖ Women recycle at a much lower rate than men.
- ❖ Senior citizens and those between 31-40 have recycled paint more often than in other age ranges.
- ❖ Asians recycle less often than in other ethnic groups.
- ❖ Generally, those with greater than \$50K annual income recycle paint more often than those in less affluent income ranges.
- ❖ As expected, those in condos recycle least often.
- ❖ Professional painters recycle more than any other group at 74%.

*N=range from 136 to 2318 by category*



# Cross-Tabulations on Key Performance Indices

## Free of Stored Paint at Home/Work



- ❖ Women are free from stored paint more often than men.
- ❖ Senior citizens store paint most often; those 30 or younger, the least often.
- ❖ Caucasian respondents store paint more often than other ethnic groups.
- ❖ The greater the income, the more often paint is stored.
- ❖ As expected, those in condos store paint least often; single family homes, most often.
- ❖ Professional painters are free from stored paint only 6% of the time; non-professionals, 27% of the time.

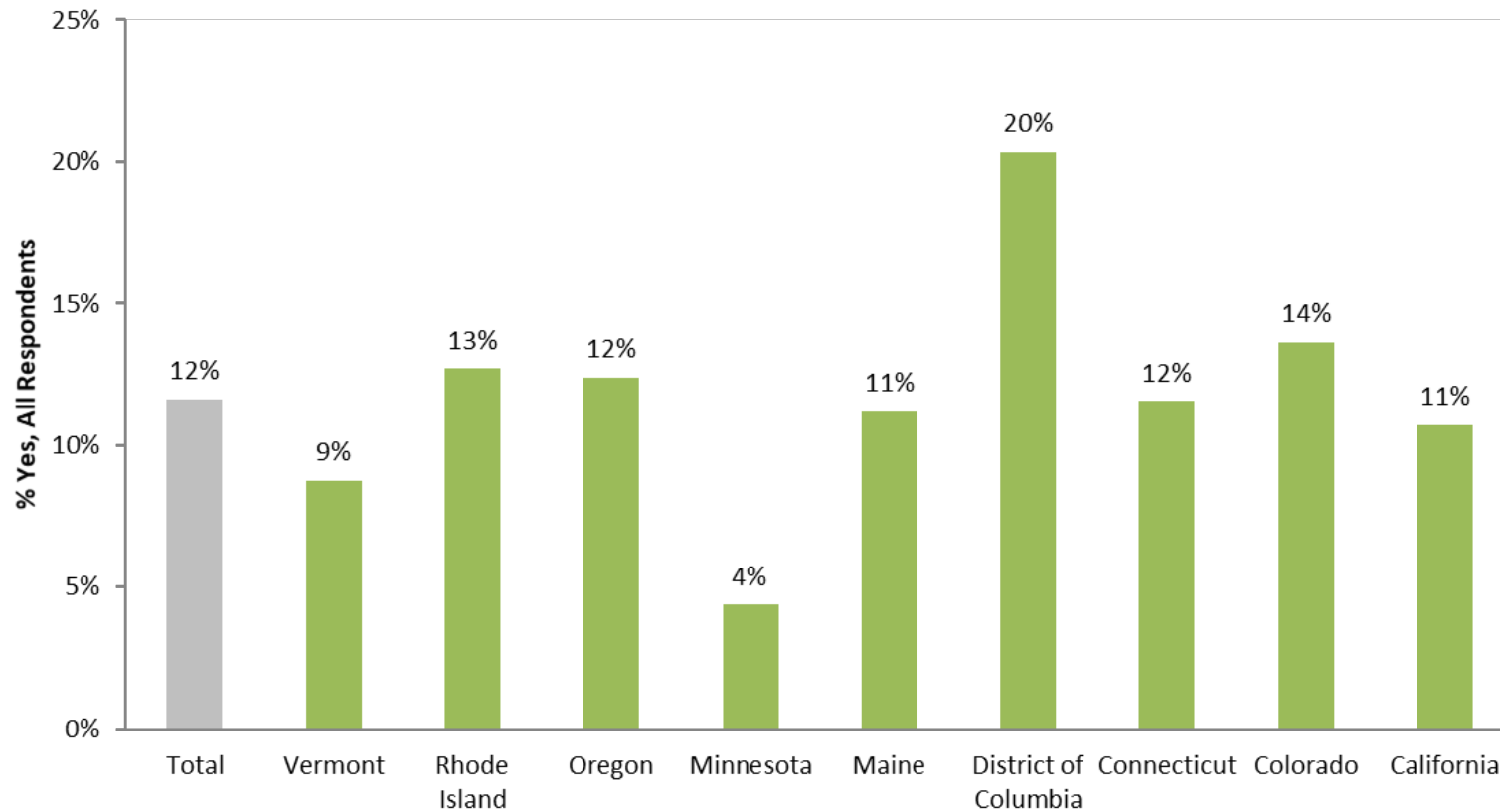
*N=range from 136 to 2318 by category*

# PaintCare ADVERTISING/MARKETING CONSIDERATIONS

## PaintCare Awareness

- ❖ 12% of respondents said they had heard of PaintCare before.
- ❖ Results differed by state/area. D.C. residents are most aware; Minnesota, least aware.

### *Have you ever heard of PaintCare before?*

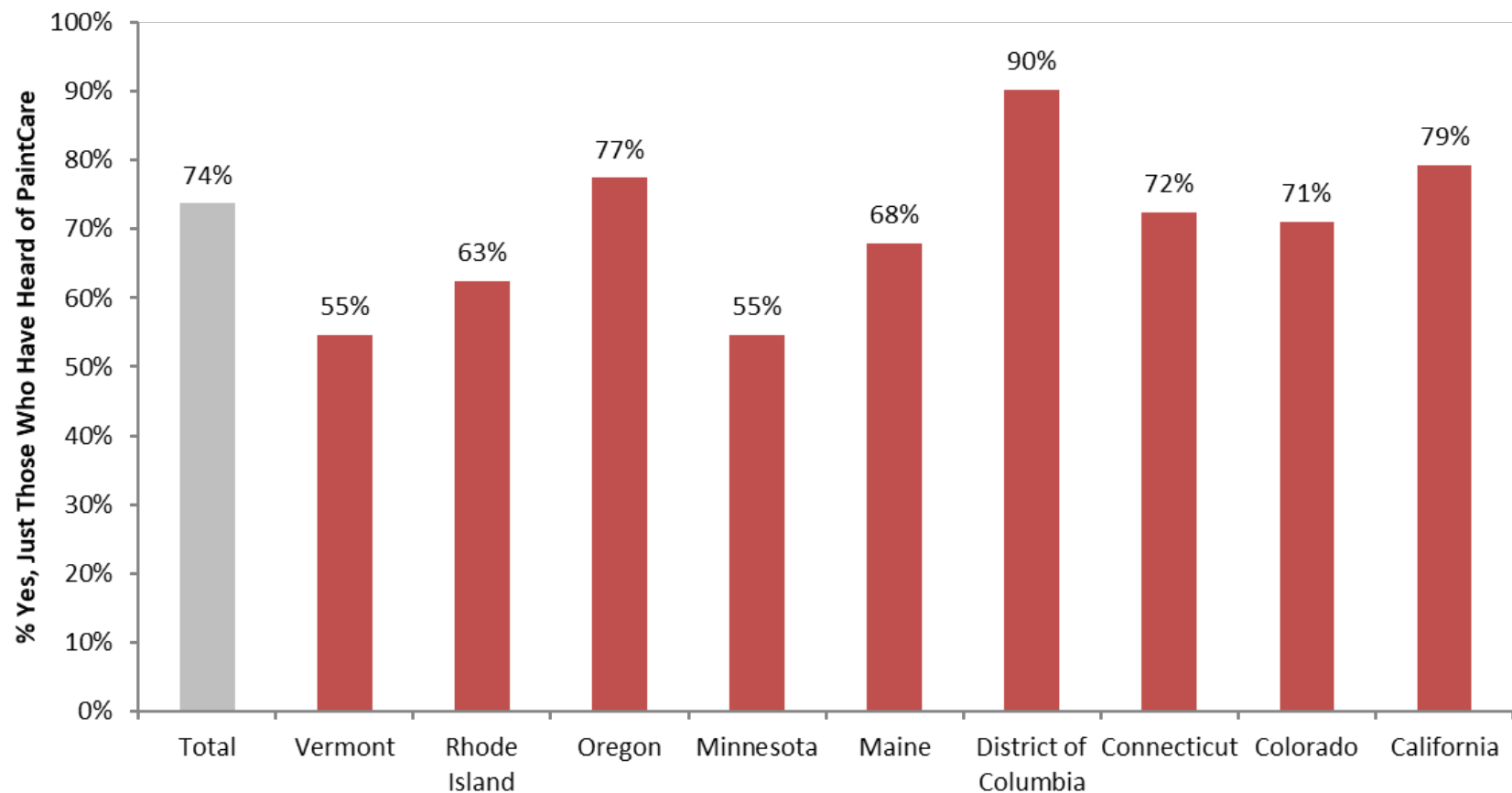


N=2578

## Ad Recall Among Those Who Knew of PaintCare

- ❖ About three quarters of those who had heard of PaintCare before said they had seen an ad in the last several months.
- ❖ However, this varied greatly by state. Minnesota and Vermont had the lowest ad recall; D.C., the highest.

***Do you recall seeing an advertisement for PaintCare in the last several months?***

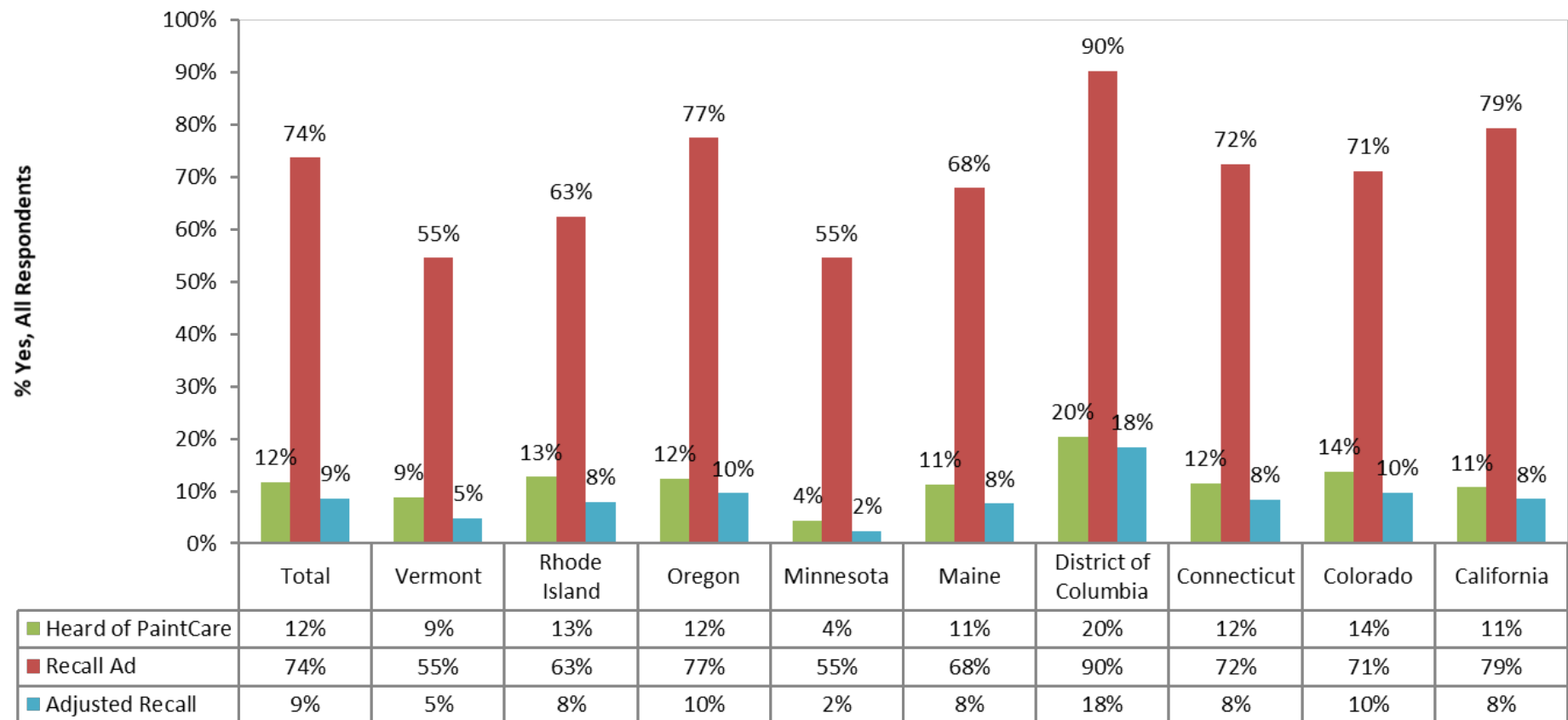


N=300

## Adjusted Recall for Entire Population

- ❖ By multiplying the percentage who were familiar with PaintCare by the percentage who recalled an ad, we can evaluate what percentage of the population recalled an ad.
- ❖ The highest performing states/areas are D.C., Colorado and Oregon.

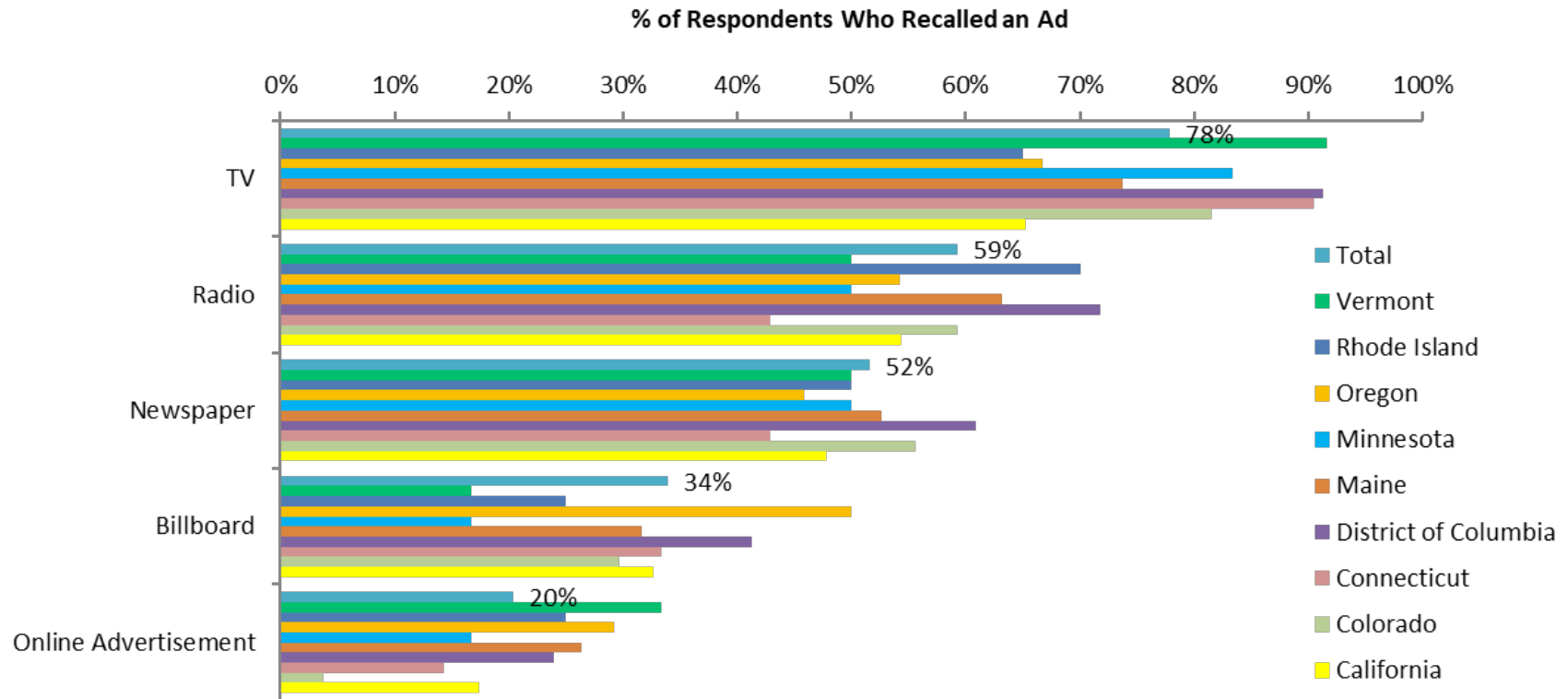
**Adjusted Ad Recall Rate**



# Ad Recall Types

- ❖ TV is most frequently cited in all states except Rhode Island, where radio is most prevalent.
- ❖ Notes: sample sizes are small by state; as such, results should be considered directionally.

## What type(s) of ad(s) do you recall?

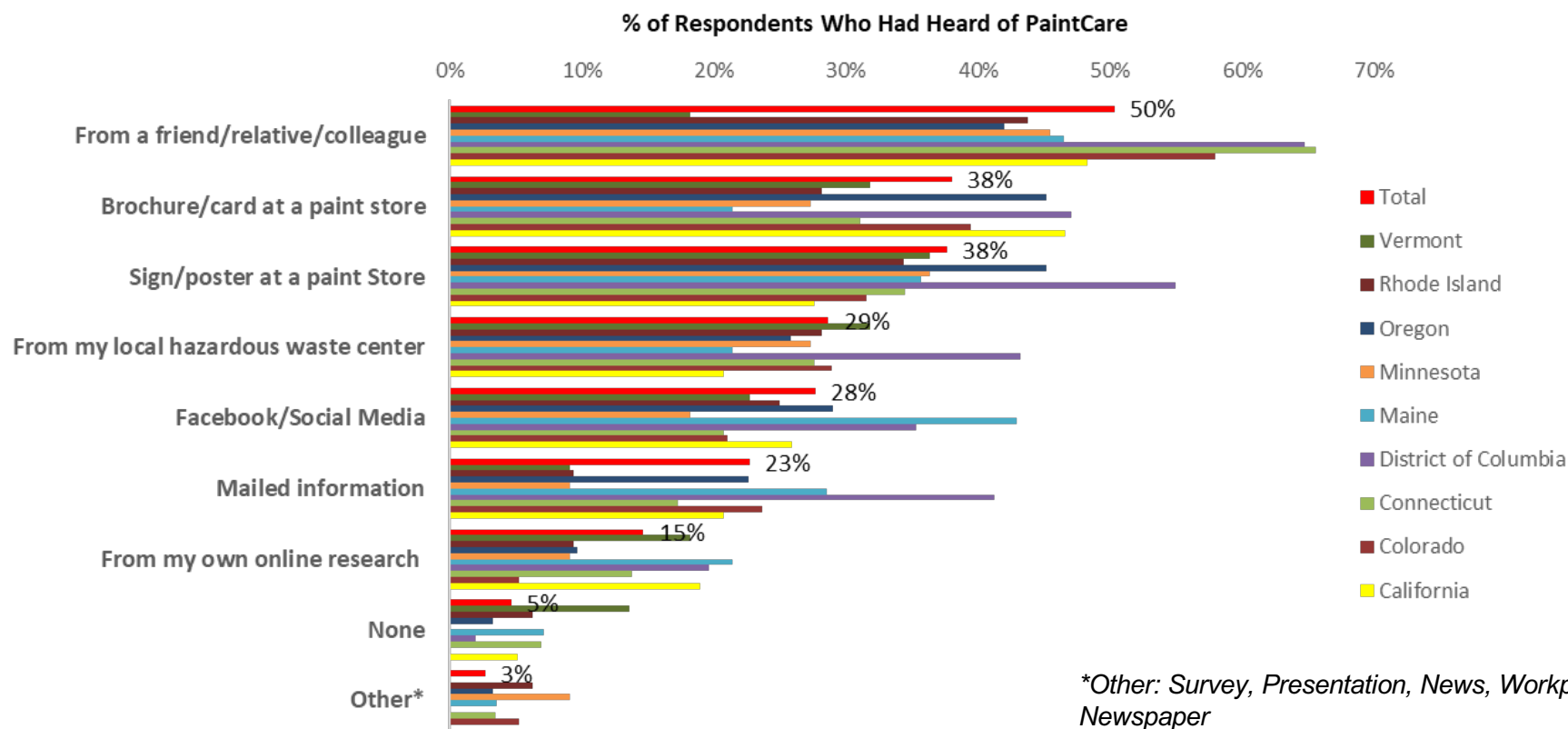


Sources	Total	Vermont	Rhode Island	Oregon	Minnesota	Maine	District of Columbia	Connecticut	Colorado	California
TV	78%	92%	65%	67%	83%	74%	91%	90%	81%	65%
Radio	59%	50%	70%	54%	50%	63%	72%	43%	59%	54%
Newspaper	52%	50%	50%	46%	50%	53%	61%	43%	56%	48%
Billboard	34%	17%	25%	50%	17%	32%	41%	33%	30%	33%
Online Advertisement	20%	33%	25%	29%	17%	26%	24%	14%	4%	17%
Sample Sizes	221	12	20	24	6	19	46	21	27	46

## Recall of Other Marketing Measures

- ❖ It is clear that word-of-mouth is extremely important in spreading the word about paint recycling.
- ❖ Other successful measures include brochures/cards/posters in-store, HHW center communications.

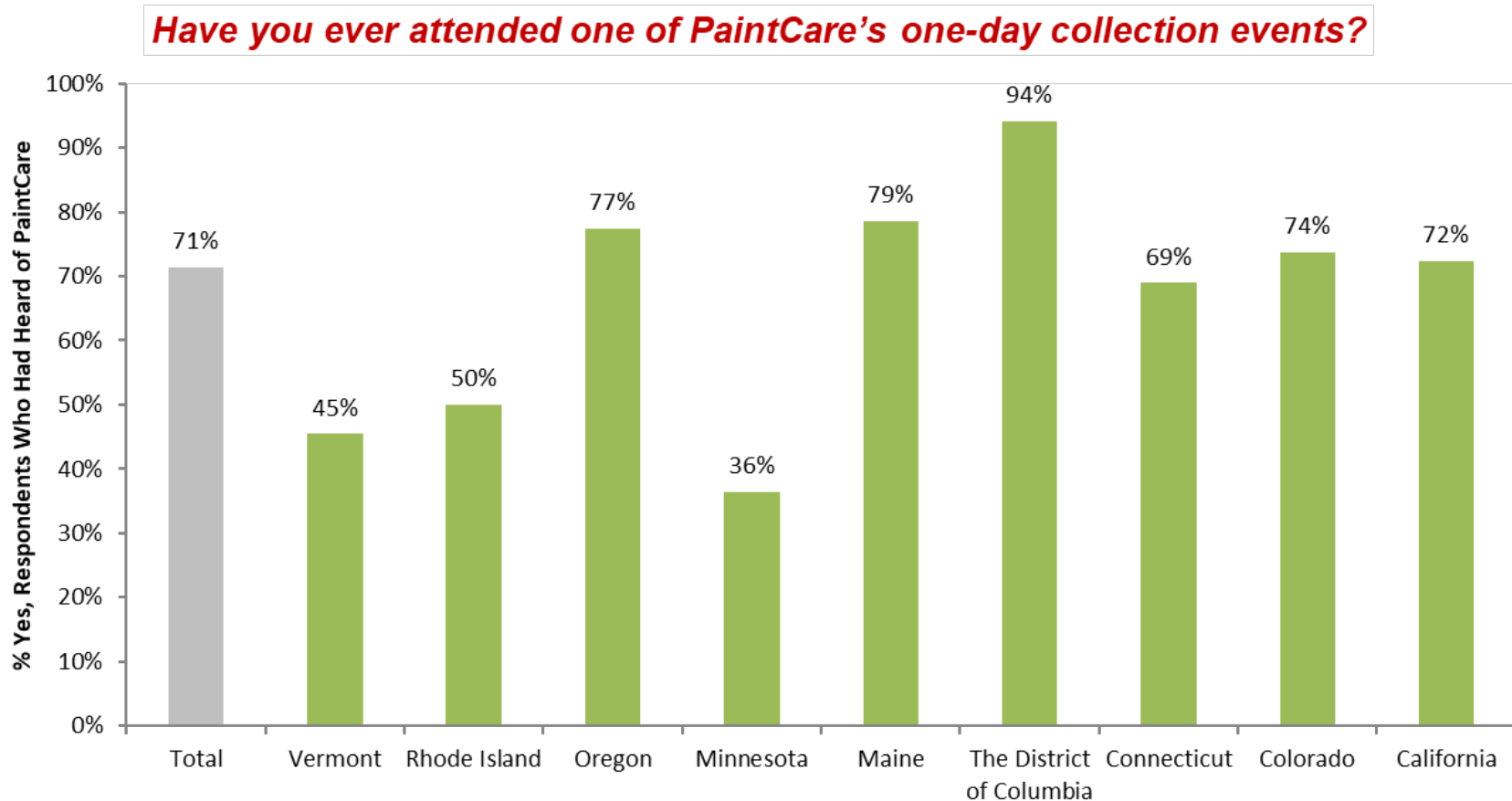
***Do you recall hearing about PaintCare in any of the following other ways?***



Sources	Total	Vermont	RI	Oregon	Minnesota	Maine	DC	Connecticut	Colorado	California
From a friend/relative/colleague	50%	18%	44%	42%	45%	46%	65%	66%	58%	48%
Brochure/card at a paint store	38%	32%	28%	45%	27%	21%	47%	31%	39%	47%
Sign/poster at a paint Store	38%	36%	34%	45%	36%	36%	55%	34%	32%	28%
From my local hazardous waste center	29%	32%	28%	26%	27%	21%	43%	28%	29%	21%
Facebook/Social Media	28%	23%	25%	29%	18%	43%	35%	21%	21%	26%
Mailed information	23%	9%	9%	23%	9%	29%	41%	17%	24%	21%
From my own online research	15%	18%	9%	10%	9%	21%	20%	14%	5%	19%
None	5%	14%	6%	3%	0%	7%	2%	7%	0%	5%
Other*	3%	0%	6%	3%	9%	4%	0%	3%	5%	0%
Sample Size	300	22	32	31	11	28	51	29	38	58

## PaintCare Event Attendance

- ❖ 71% of those who have heard of PaintCare say that they have attended a PaintCare collection event.
- ❖ District of Columbia appears to have high success rates; Minnesota, much lower.\*
- ❖ \*Note: sample sizes are low by state and should be considered directionally.



N=300

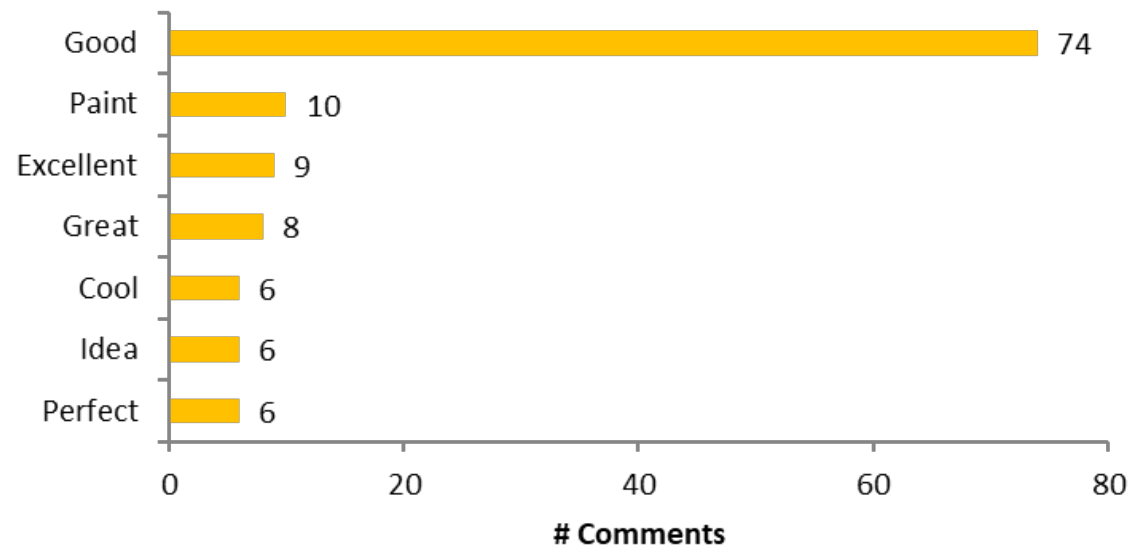


# Impressions of PaintCare

*In a word or phrase, what are your overall impressions of PaintCare?*



## Comment Coding: PaintCare Keywords



# Comments: Paint Care Impressions

In a word or phrase, PaintCare	good	Great idea	is very good	paint recycling made easy
A great way to dispose of old or unused paint	Good	Great idea	is very good perfect	paint to your hearts content.
A terrific idea.	good	Great idea.	is very good perfect	Plays an important role
all very good, my planet	Good	great program	is very good perfect	Positive
amazing	Good	Great program	It facilitates the recycling of unwanted paint residues	Positive
beauty	Good	great!	good way of recycling paint, donated to good causes as well	quality
because is good	Good	Held the planet for the recycling	viable alternative to bringing paint to my local hazard waste center.	quality
Better	good	Helpful	its a good idea	quality
Busy	Good	Helpful	It's a good option for left over paint.	SAFE
care for the environment	good	good for the environment	it's a very big motivation	SAVING THE WORLD
Clean	Good	i like	It's good	Seems like a good idea
contemporary	good	i like it	it's unique	The orange sister of a man
cool	good	i like this idea	it's very good	the PaintCare is the best
cool	Good	i like this method	like	they are the best
cool	Good	i love it	like	They do a good job at recycling paint
cool	Good	I think a good company. It looks to be so	like	They have used and new paint
Cost	good	without them, you would just be making more trash you	like	They refill the paint if needed
design	good	Impressive	like	Thought of well
DIY	good	innovation and progress	like	Under advertised, not widely known.
dope	good	Is a leader in the service they provide	Love	unique
Easy	good	is excellent	Love	Unique
Environmentally friendly.	good	is good	Love it	Vague
excelente	Good	is good	more2	very good
excellent	good company	is perfect	Nanny-state	very cool
excellent	Good company	is very good	Necessary	very cool
excellent	Good efforts, thank you.	is very good	No opinion	very good
excellent	good idea but should not be compulsory	is very good	No strong feelings	very good
excellent	Good idea!	is very good	no sure	very good
Excellent	Good Option	is very good	none	very good
Excellent and needed	Good program with good results	IS VERY GOOD	none	very good
fast speed	good service	is very good	none	very good
Fine	Good	is very good	None	very good
Genius!	great	is very good	not too much.	Very impressive paint product
Go for it	great	is very good	Nothing	very nice
good	Great	is very good	Ok	works well
good	great	is very good	Ok	wow
Good	Great	is very good	ok	WOW

# CROSS-TABULATIONS: ADVERTISING/MARKETING METRICS

## Cross-Tabulations for Better Understanding

- ❖ In order to understand how to better approach consumers of different profiles, it is important to look at behaviors/awareness by group...

Objective	Related KPI/Measurement
Increase knowledge of paint recycling	<i>Do you know that paint can be recycled?</i>
Impact paint recycling behaviors	<i>Have you ever taken paint somewhere to be recycled?</i>
Decrease storage of paint in home	<i>Do you currently have any leftover or unwanted paint in your home or business (e.g., primer, interior house paint, stain, deck sealer, or clear finishes like varnish)? If so, how much paint do you have?</i>
Increase knowledge of PaintCare	<i>Have you ever ever heard of PaintCare, the program that sets up sites that take paint for recycling?</i>
Execute memorable ads	<i>Do you recall seeing an advertisement for PaintCare in the last several months?</i>
Stimulate word of mouth and other communications	<i>Do you recall hearing about PaintCare in any of the following other ways?</i>

*Gender*

*Age*

*Ethnicity*

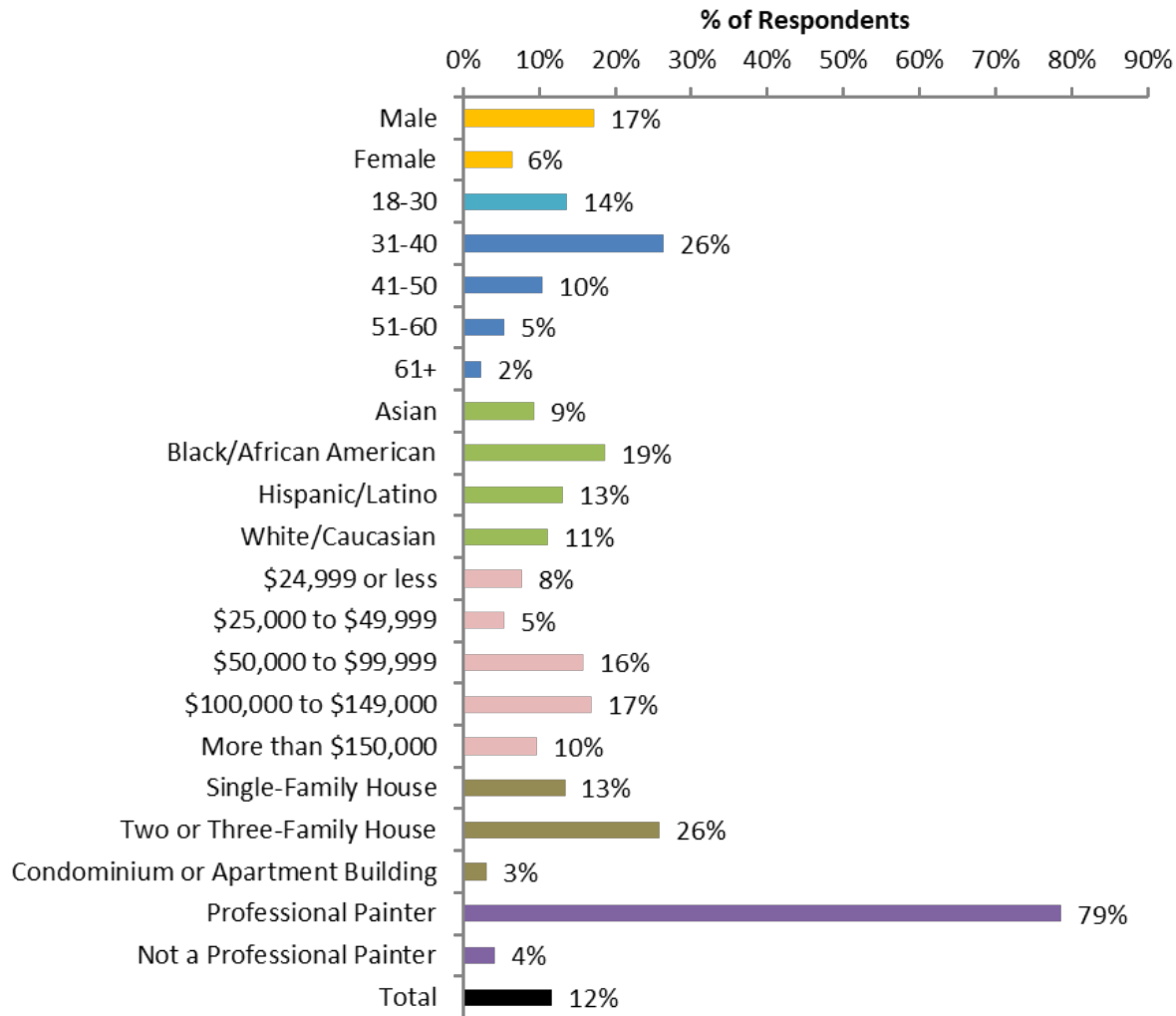
*Income*

*Dwelling Type*

*Profession*

# Cross-Tabulations on Key Performance Indices

## Heard of PaintCare Before

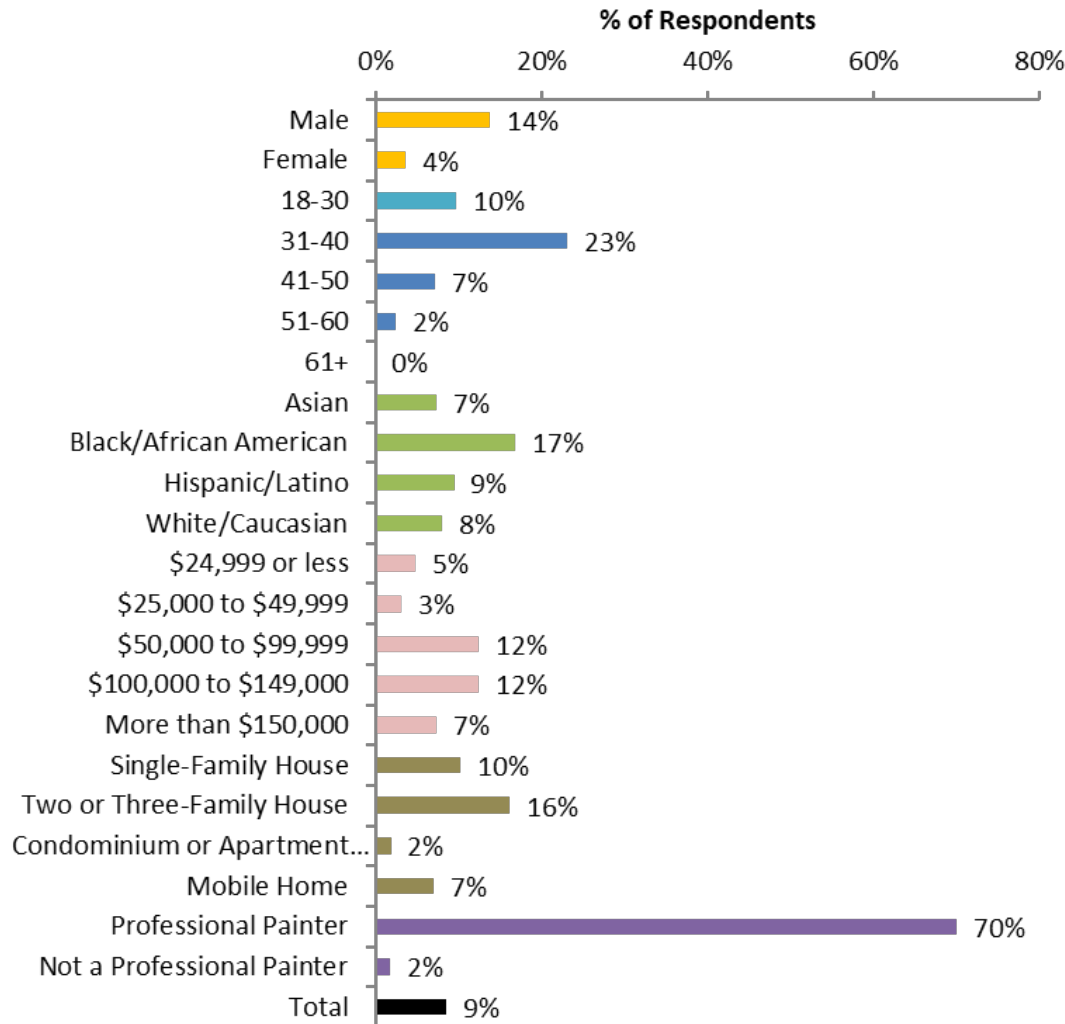


- ❖ Only 6% of women had heard of PaintCare before the survey, less than half the rate of men.
- ❖ Senior citizens had heard of PaintCare least often; those 31 - 40, the most often.
- ❖ African American respondents had heard of PaintCare more often than those in other ethnic groups.
- ❖ PaintCare awareness was highest among those with incomes \$50-\$150K.
- ❖ Those in multi-family homes are aware of PaintCare most often.
- ❖ Professional painters are far more aware of PaintCare than those that do not paint professionally.

*N=range from 136 to 2318 by category*

# Cross-Tabulations on Key Performance Indices

## Ad Recall (adjusted)

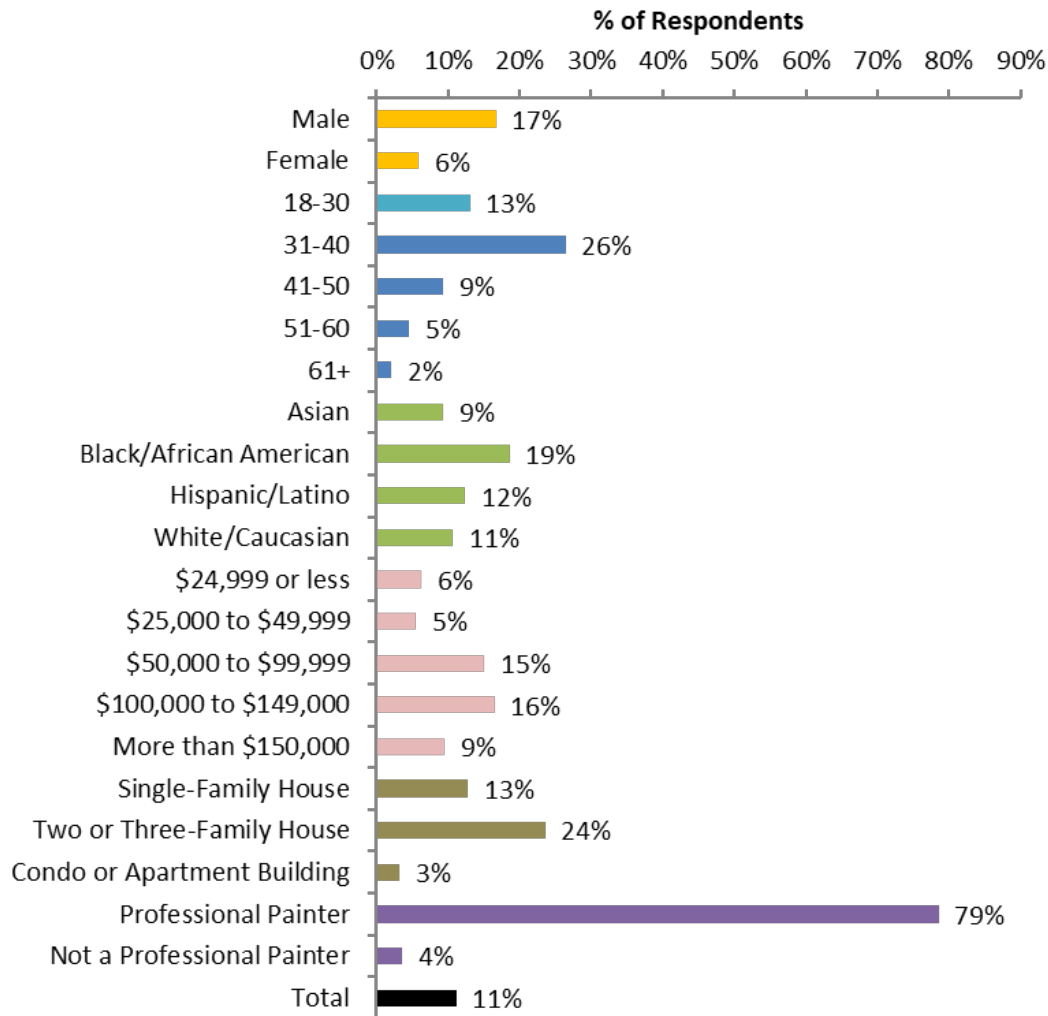


- ❖ Significantly fewer women recalled a PaintCare ad than men did.
- ❖ The highest recall was among 31-40 year olds.
- ❖ African Americans reported the highest ad recall (possibly not due to ethnicity, but concentration in high-performing areas).
- ❖ Those with incomes \$50K or higher had the highest ad recall.
- ❖ Those living in two to three family houses reported the highest recall.
- ❖ The majority of professional painters recalled an ad; only 2% of the general public remembered an ad.

*N=range from 136 to 2318 by category*

# Cross-Tabulations on Key Performance Indices

## Heard of PaintCare in Other Ways



*N=range from 136 to 2318 by category*

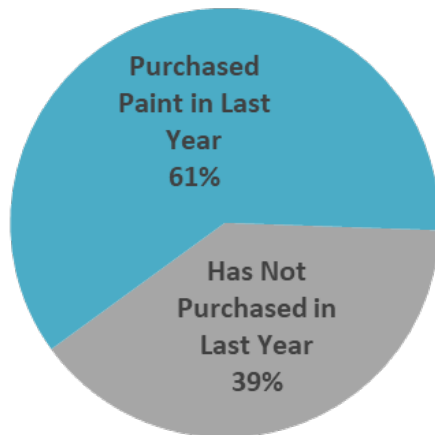
- ❖ More consumers hear of PaintCare in ways other than advertising, such as: referrals from a friend/relative/colleague, a brochure/card/sign/poster at a paint store, from my local hazardous waste center, mailed information, Facebook/social media, and their own online research.
- ❖ Women are still much lower than men in these channels as well.
- ❖ 31-40 are impacted through these channels the most.
- ❖ Generally, those with greater than \$50K annual income are impacted the most by non-ad channels.
- ❖ As expected, those in condos receive these messages least often.
- ❖ Professional painters are exposed more than any other group at 79%.

## Defining the Target Audience

- ❖ Since women are much less impacted than men by current PaintCare advertising/marketing efforts, it is prudent to examine whether we are missing an opportunity, or appropriately prioritizing men.
- ❖ Based on buying behavior, men *and* women are both substantially involved in decisions related to paint. Therefore, the former may be true.
- ❖ For future analysis: are those who purchase also the same as those who dispose?

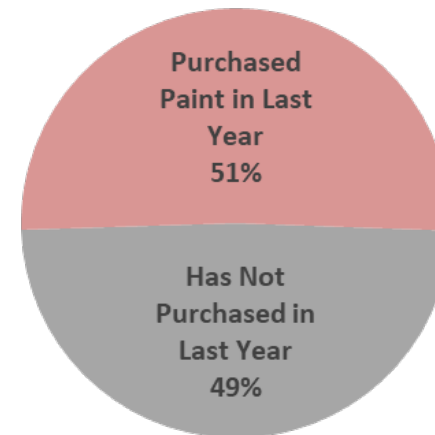
### Male Respondents:

*Have you purchased paint in the last year?*



### Female Respondents:

*Have you purchased paint in the last year?*



*N=1249 men and 1300 women*



## Defining the Target Audience (continued)

	Purchased in Last Year
<b>GENDER</b>	
Male	<b>61%</b>
Female	<b>51%</b>
<b>AGE</b>	
18-30	<b>52%</b>
31-40	<b>64%</b>
41-50	<b>55%</b>
51-60	<b>52%</b>
61+	<b>51%</b>
<b>ETHNICITY</b>	
Asian	<b>45%</b>
Black/African American	<b>52%</b>
Hispanic/Latino	<b>58%</b>
White/Caucasian	<b>57%</b>
<b>INCOME</b>	
\$24,999 or less	<b>38%</b>
\$25,000 to \$49,999	<b>48%</b>
\$50,000 to \$99,999	<b>62%</b>
\$100,000 to \$149,000	<b>64%</b>
More than \$150,000	<b>56%</b>
<b>DWELLING</b>	
Single-Family House	<b>63%</b>
Two or Three-Family House	<b>61%</b>
Condominium or Apartment Building	<b>31%</b>
Mobile Home	<b>44%</b>
<b>PROFESSION</b>	
Paint Professionally	<b>92%</b>
Do Not Paint Professionally	<b>51%</b>

- ❖ PaintCare might consider all audiences with at least 50% involvement in recent paint purchases as the general advertising target (highlighted in yellow).
- ❖ However, there are a few pockets where additional, specialized targeting might be appropriate (bolded).

# APPENDIX: STATE HIGHLIGHTS

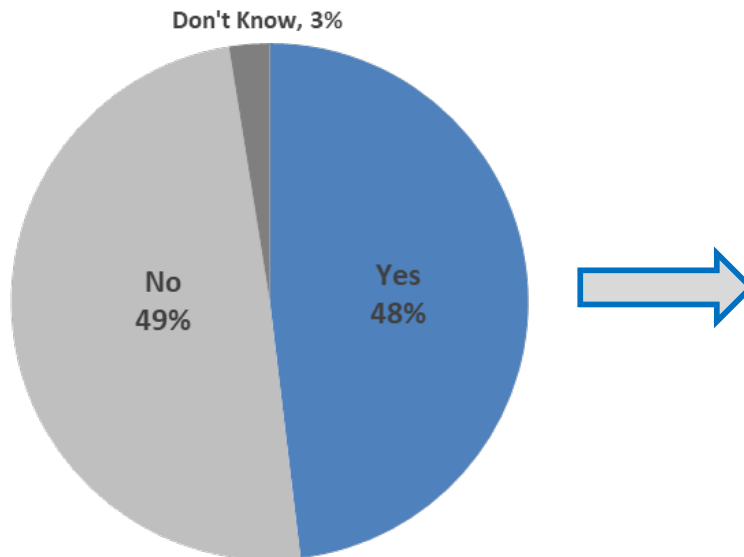


# California

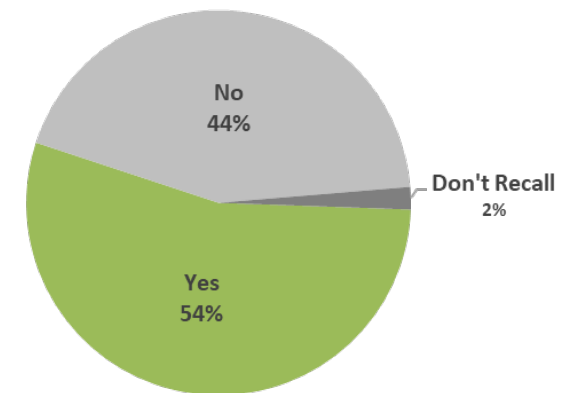
## California Highlights

- ❖ About half of those surveyed have purchased paint in the last year. Slightly more than half of them were helped by the store in determining needs. About two thirds took measurements themselves.

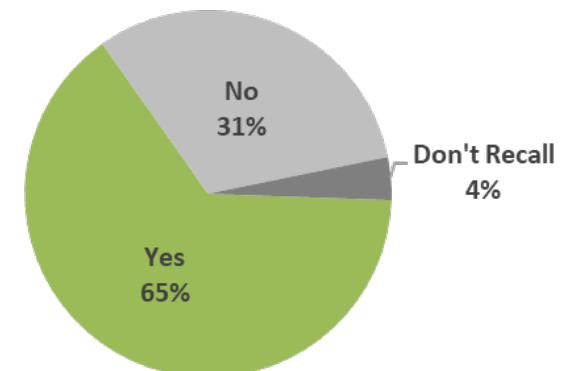
*Have you purchased paint in the last year?*



*Did the staff of the paint retail store assist you with figuring out exactly how much paint you needed for your specific project?*



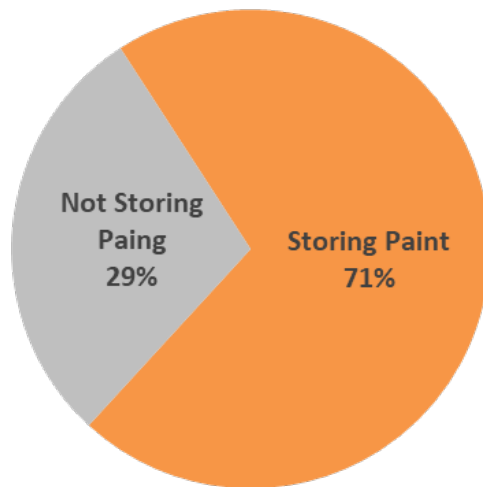
*Before purchasing, did you take any measurements of the area to be painted to figure out how much paint was needed?*



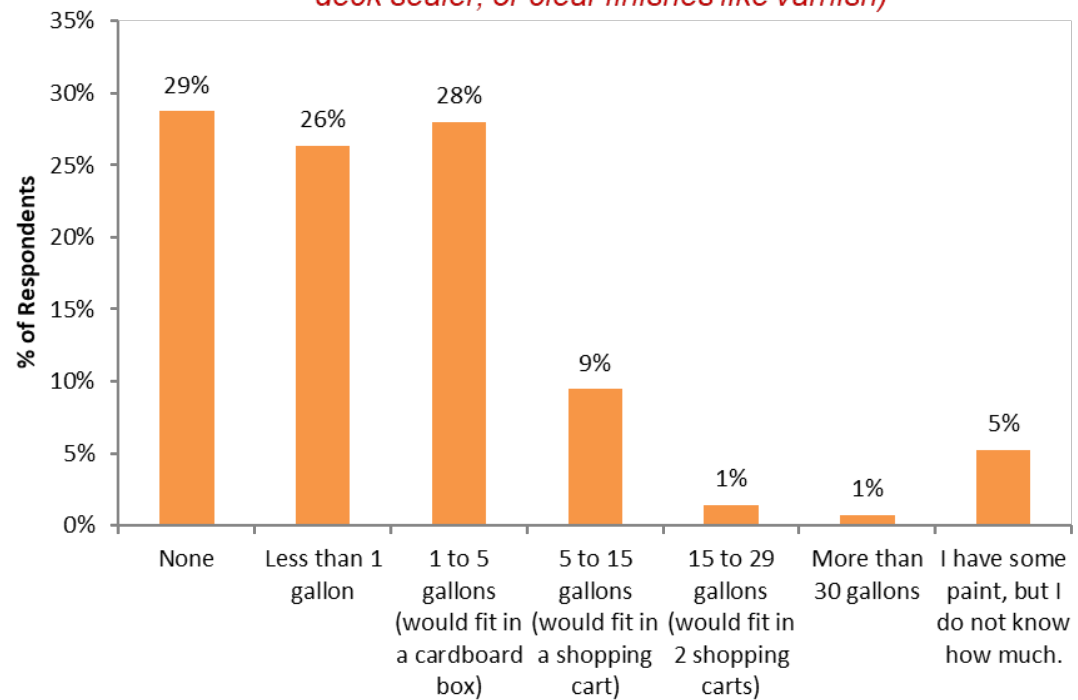
## California Highlights

- ❖ 29% of respondents are NOT storing paint at home or at their business. The median amount stored is “less than 1 gallon.”

**Paint Storage**



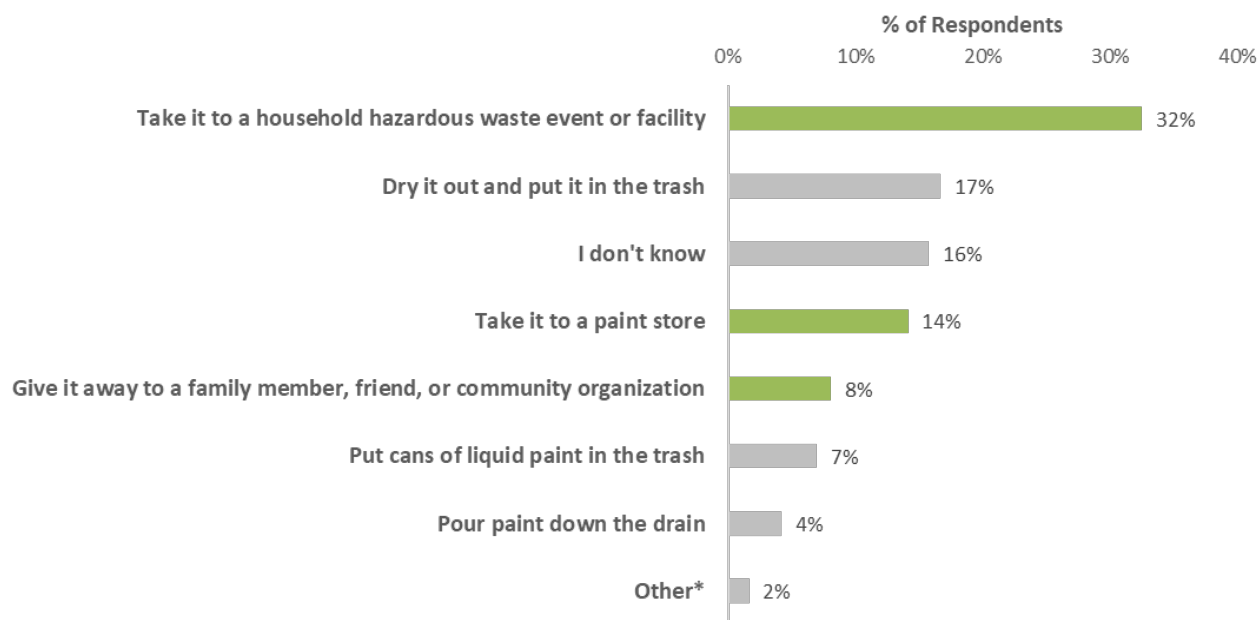
**How much leftover or unwanted paint do you have in your home or business at this time?**  
(e.g., primer, interior or exterior house paint, stain, deck sealer, or clear finishes like varnish)



# California Highlights

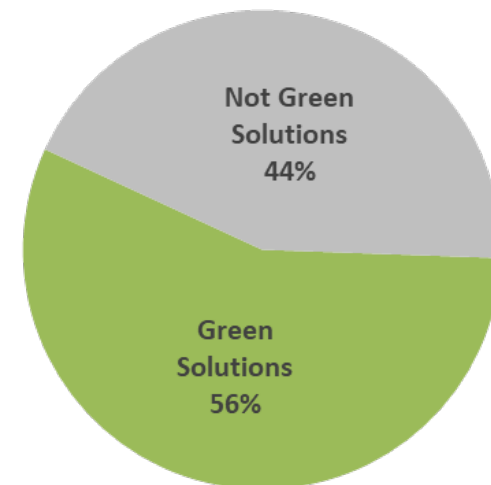
❖ 56% of respondents say they will use a “green” solution for getting rid of unwanted paint in the future.

*If you wanted to get rid of unwanted paint in the near future, what would you most likely do with it?*



*Other Future Disposal Methods
Call the scavenger company to pick up.
Contact my waste disposal service to see what they recommend
Hired painter, he took leftovers
I'll either give it to someone who will use it or take it to hazardous waster event/facility
Research how to dispose of properly
take it to our Ace hardware for paint recycling
take it to the city waste center
Take it to the dump
waste management

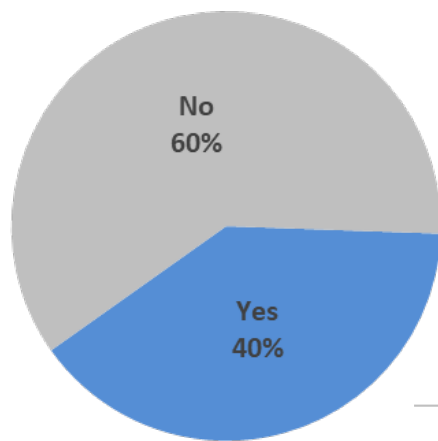
Green Solutions (Recycle, Reuse)



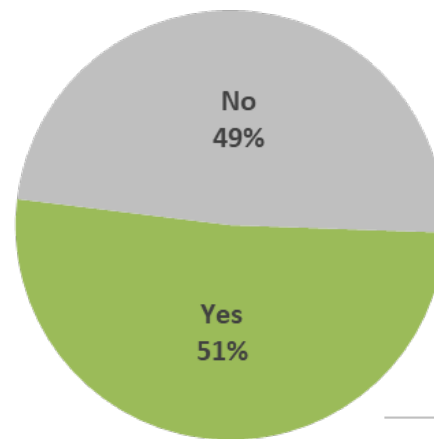
## California Highlights

- ❖ 40% of respondents knew that paint can be recycled.
- ❖ Of those, about half have taken paint somewhere to be recycled in the past.
- ❖ Of those, the grand majority, 93%, would consider recycling paint again.

*Prior to this survey, did you know that paint can be recycled?*



*Have you ever taken paint somewhere to be recycled?*



*Would you consider recycling leftover paint in the future?*

