



Consumer Awareness Study: Canada



presented by

POLARIS[®]
MARKETING RESEARCH

Your Compass for the Marketplace.

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- ❖ Hoarding Behavior
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Rechargeable Battery Current Usage State



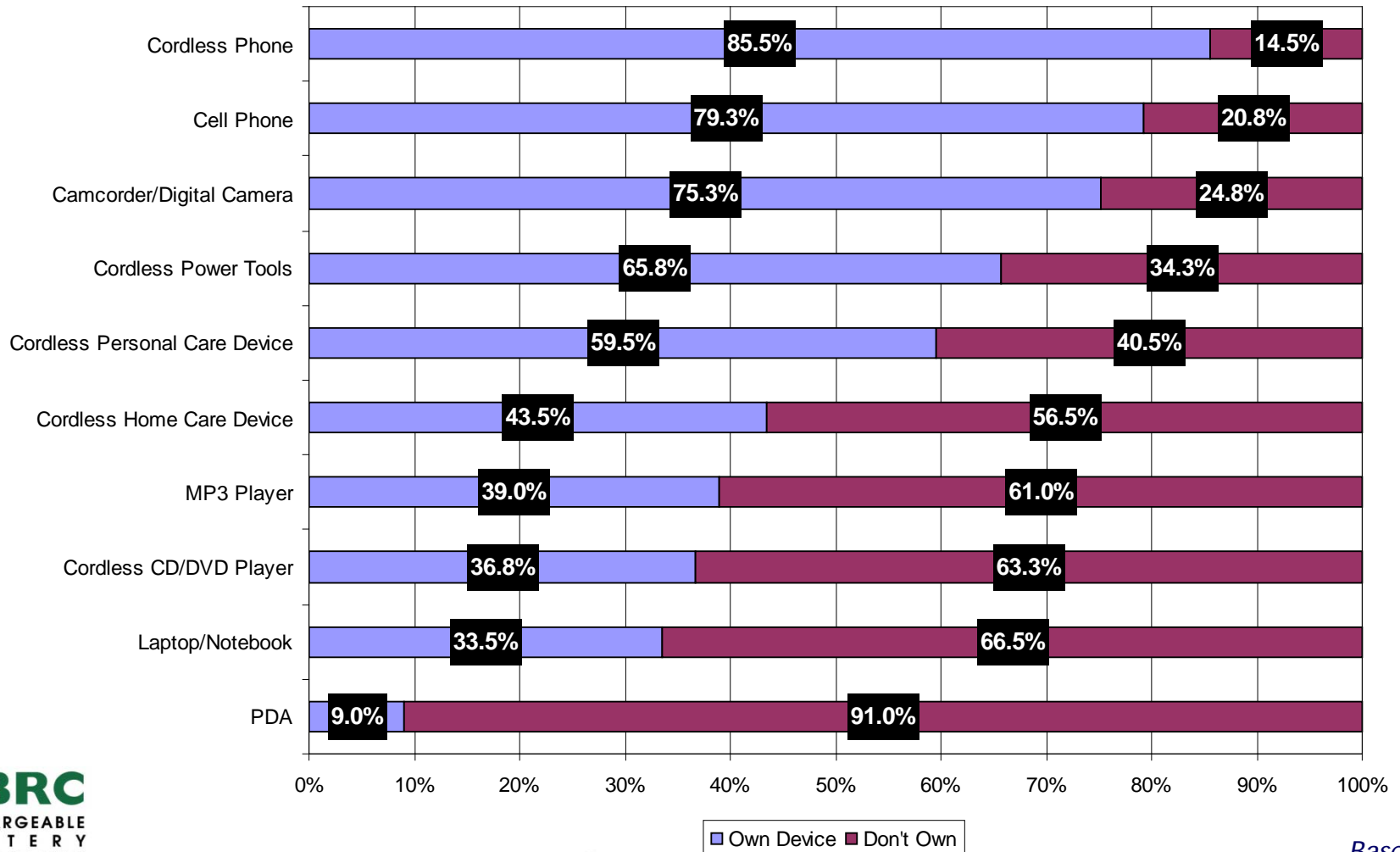
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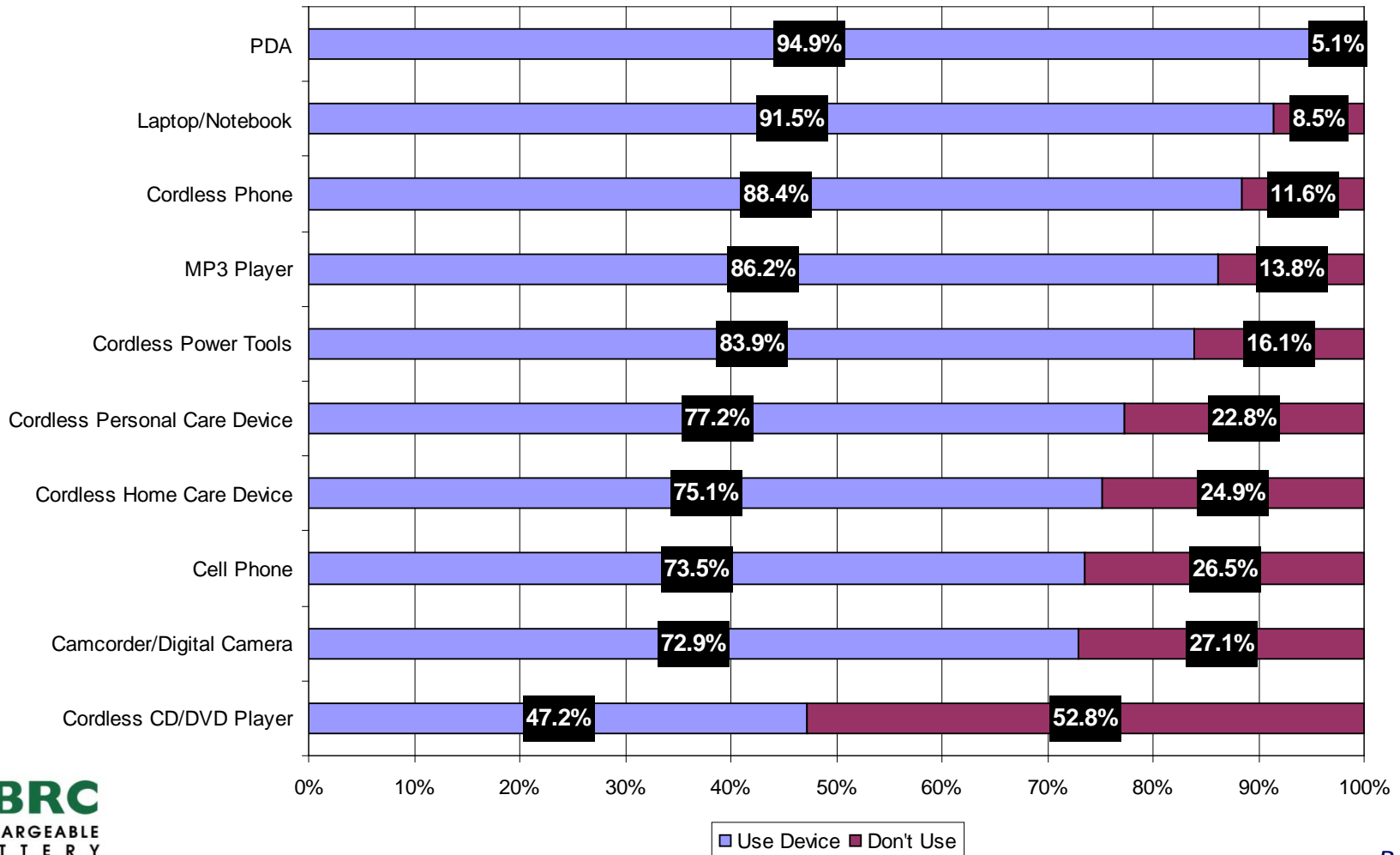
Current Ownership

Percent Owning Types of Cordless Devices

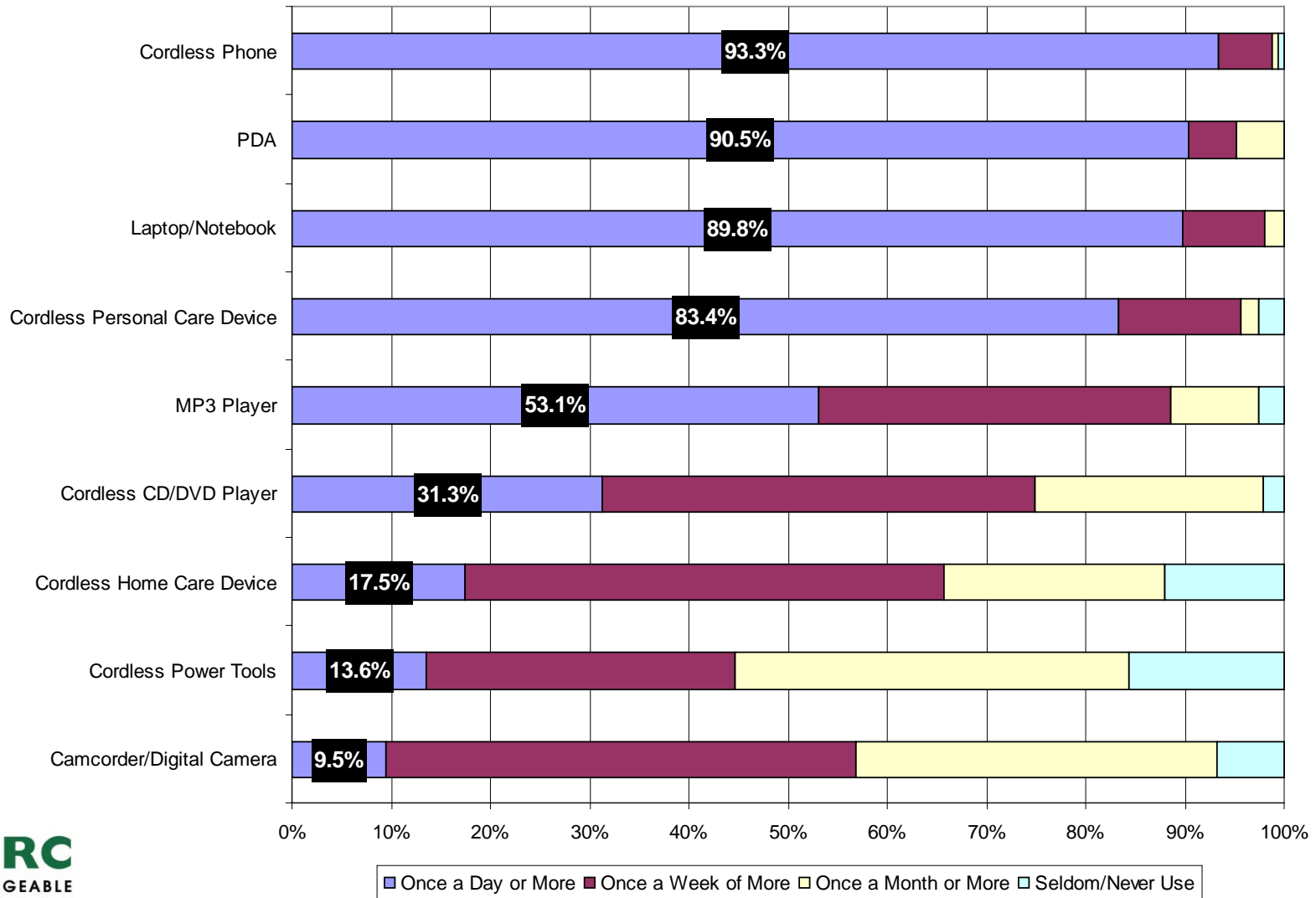


Current Usage

Percent of Devices Still Being Used

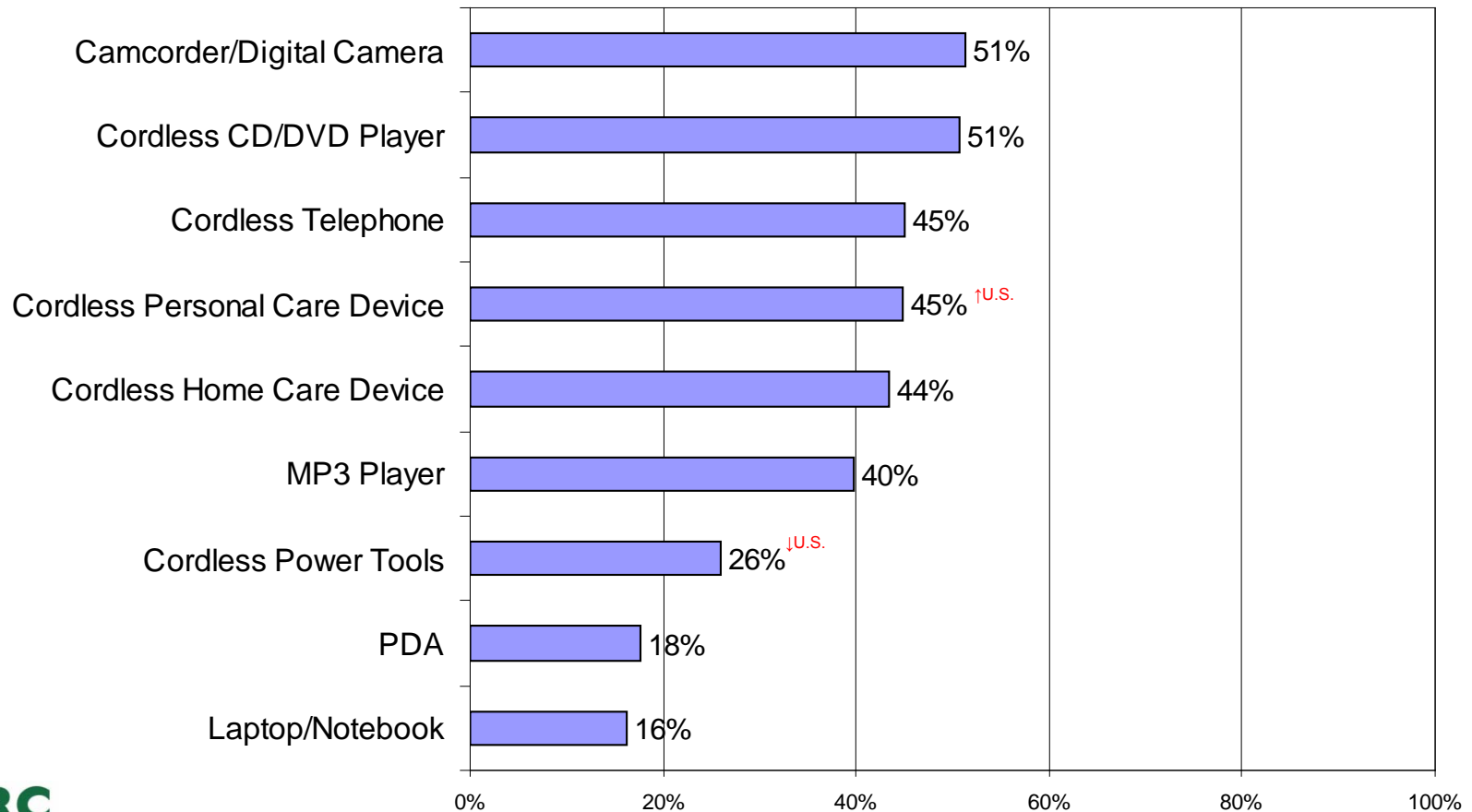


Frequency of Use



Battery Change/Replacement

Have you ever changed or replaced the battery for...?



Symbols:

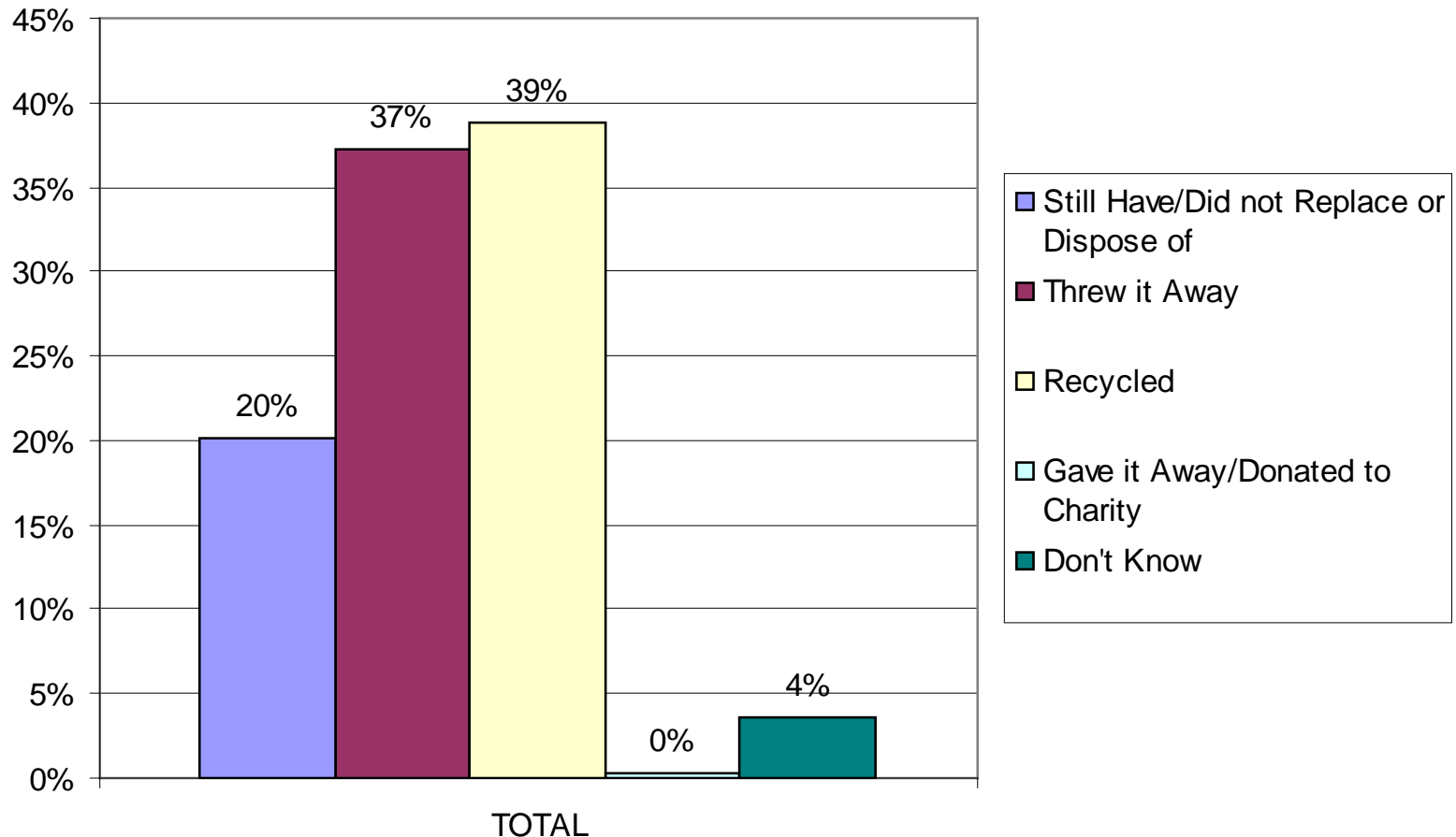
↑U.S. = Score is significantly higher than U.S.

↓U.S. = Score is significantly lower than U.S.

Percentage = those answering "Yes"

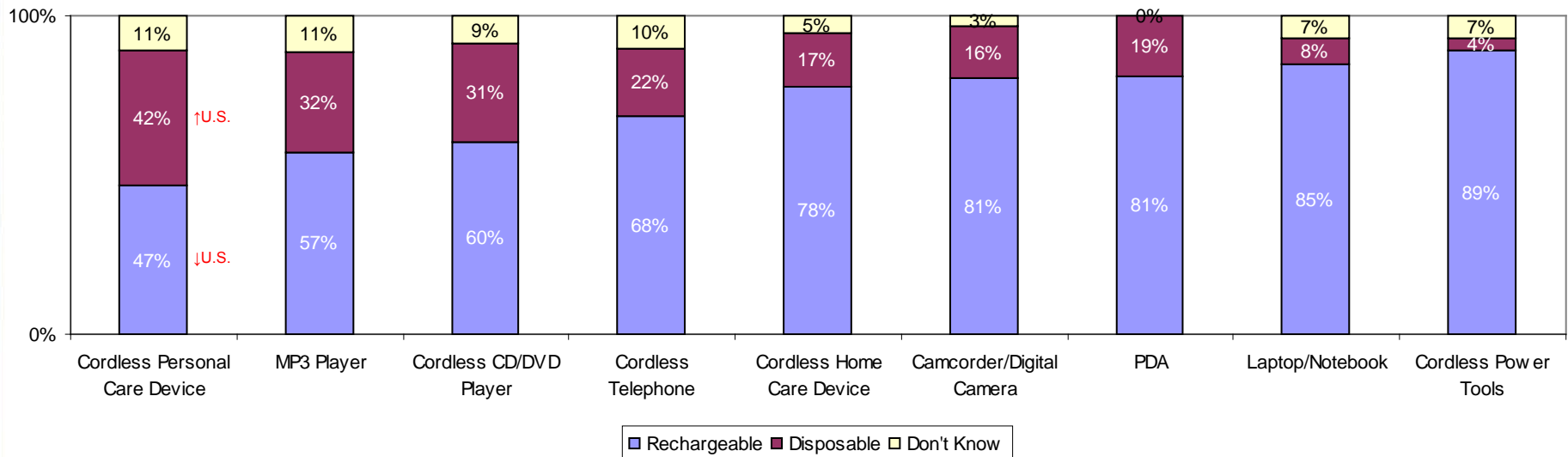
What Happened to Device's Original Battery?

Base= Those answering "Yes," changed or replaced the battery for...?" for all devices combined

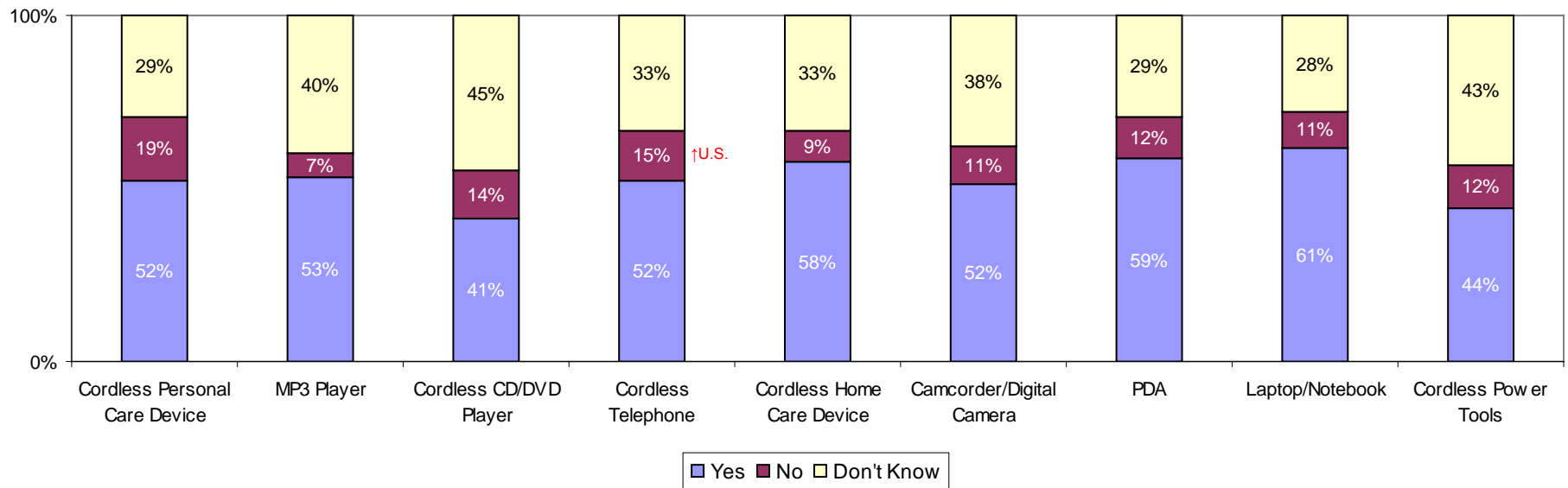


"Recycled" includes: Put it in curbside Recycling, Took it to a Recycling Center, Put it in Retail Store Dropoff Box, Left it with a Retail Store Employee, Sent it to Manufacturer

Are Batteries Disposable or Rechargeable?



Are Your Rechargeable Batteries Recyclable?



Respondents who answered "Rechargeable" to "Are the batteries contained within the unit Disposable (Single Use) or Rechargeable?" were then asked: "Do you think the rechargeable battery in the device can be recycled?"

Hoarding Behavior

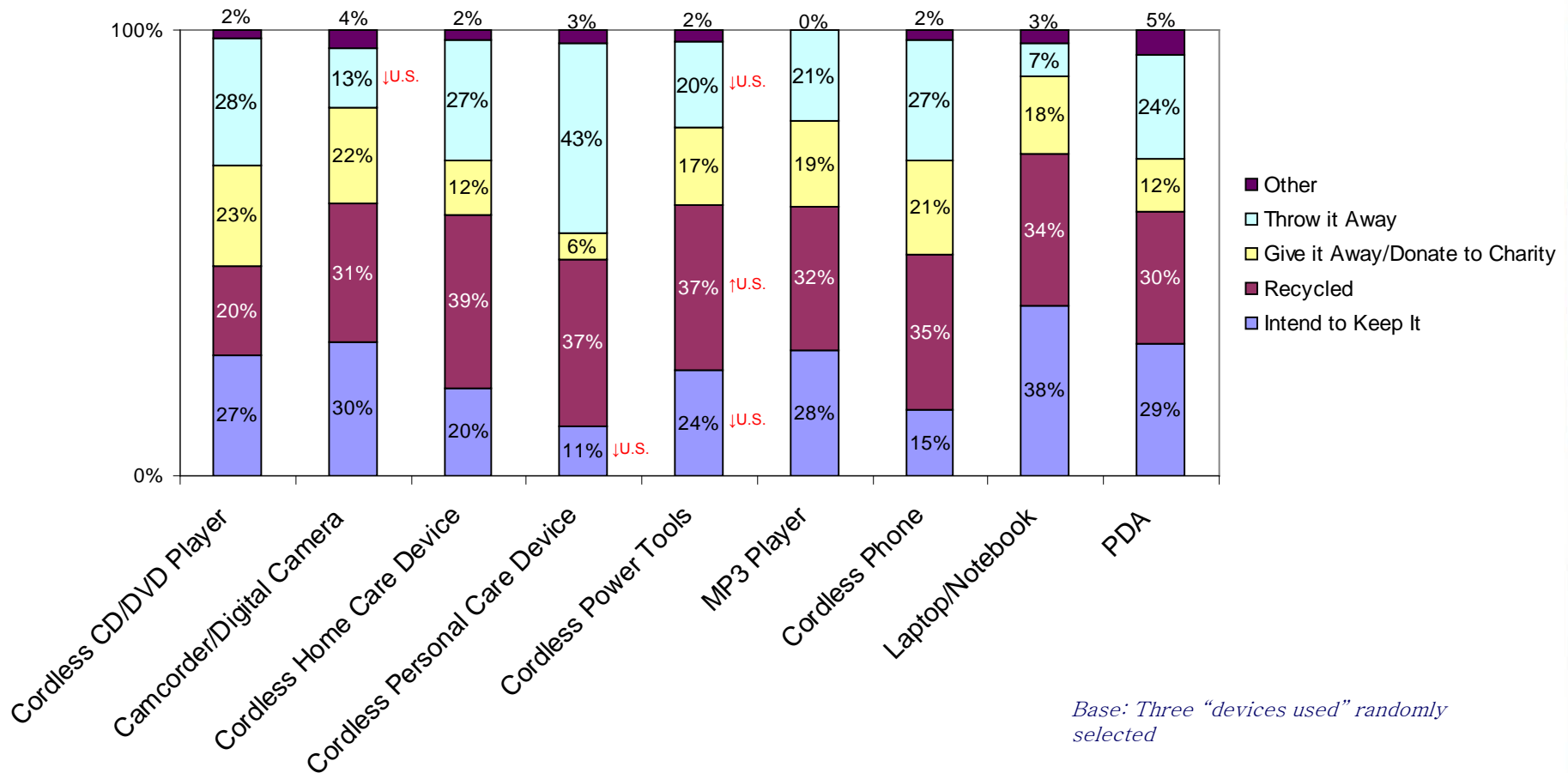


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How Do You Intend to Dispose of Device?

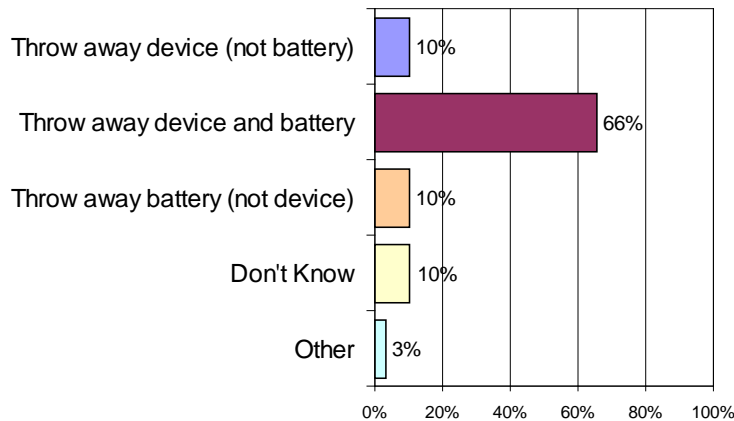


"Recycled" includes: 1) Put it in curbside Recycling, 2) Took it to a Recycling Center, 3) Put it in Retail Store Dropoff Box, 4) Left it with a Retail Store Employee, and 5) Sent it to Manufacturer

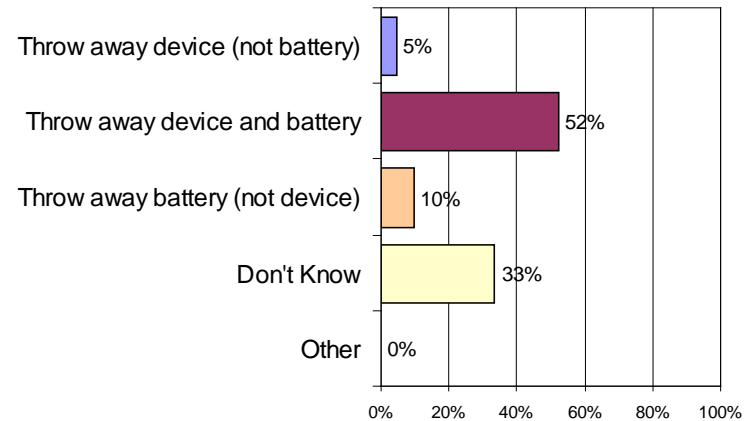
Did You Throw Away Battery and/or Device?

"For the following device you threw away or intend to throw away, which of the following best describes the situation?"

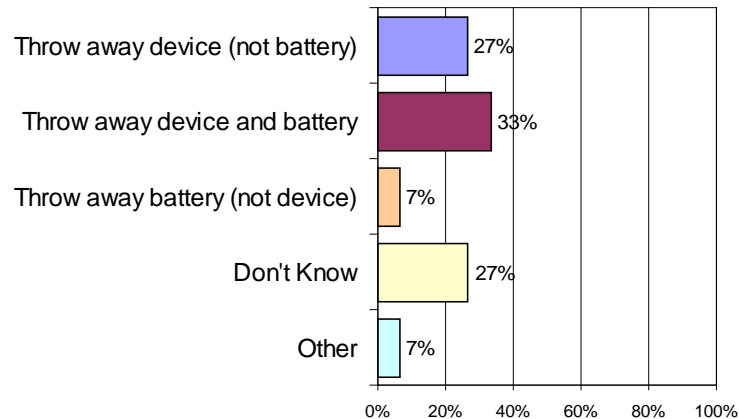
Cordless Personal Care Device (n=29)



Cordless Phone (n=21)



Cordless Home Care Device (n=15)

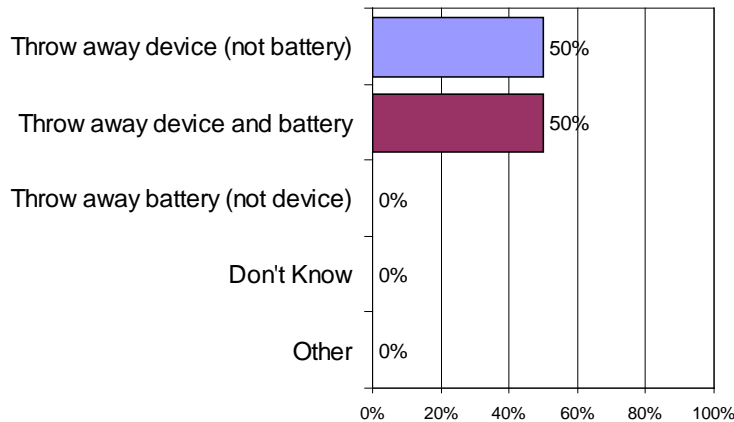


Note: Extremely small base sizes

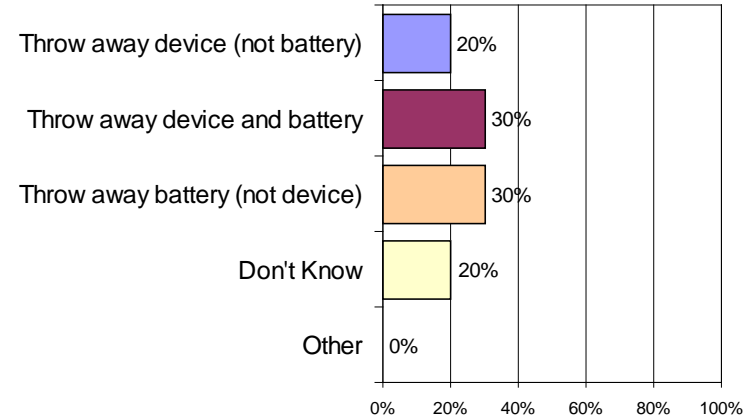
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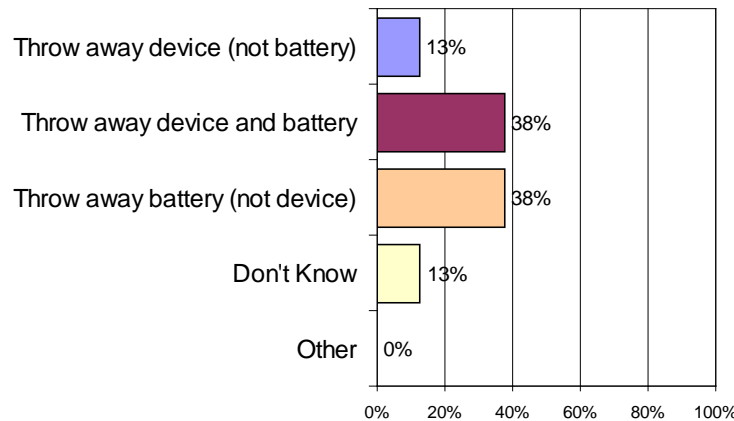
PDA (n=2)



Cordless Power Tools (n=20)



MP3 Player (n=8)

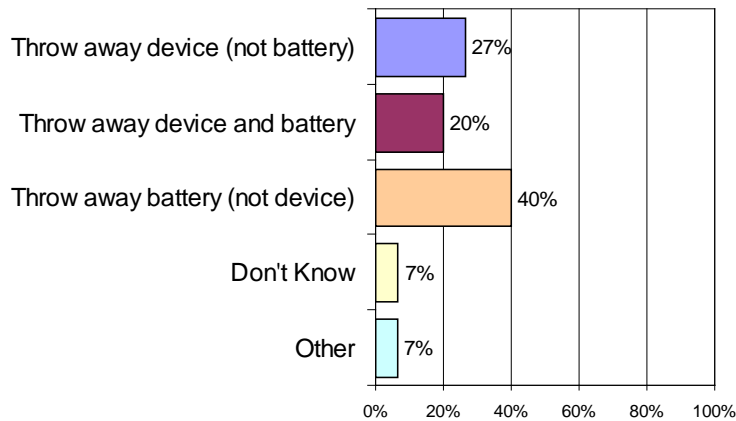


Note: Extremely small base sizes

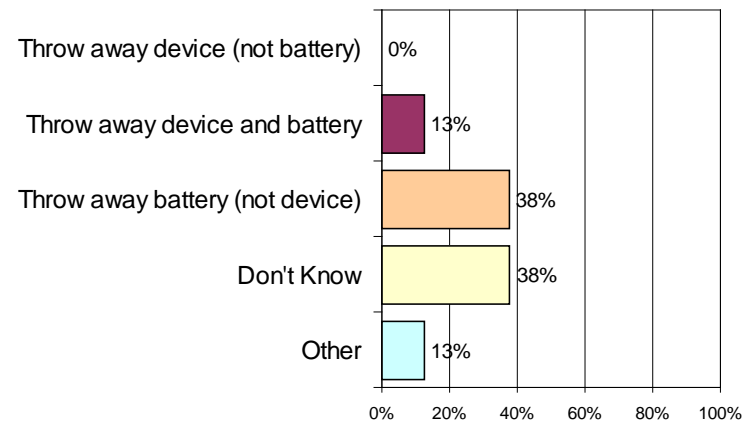
Did You Throw Away Battery and/or Device?

"For the following device you threw away or intend to throw away, which of the following best describes the situation?"

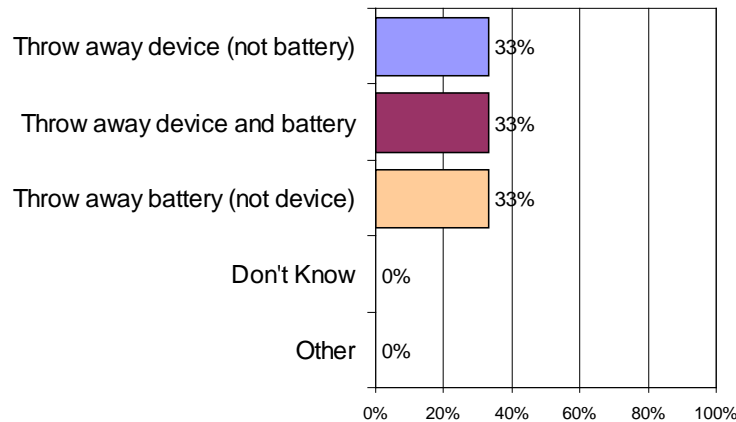
Cordless CD/DVD Player (n=15)



Camcorder/Digital Camera (n=8)

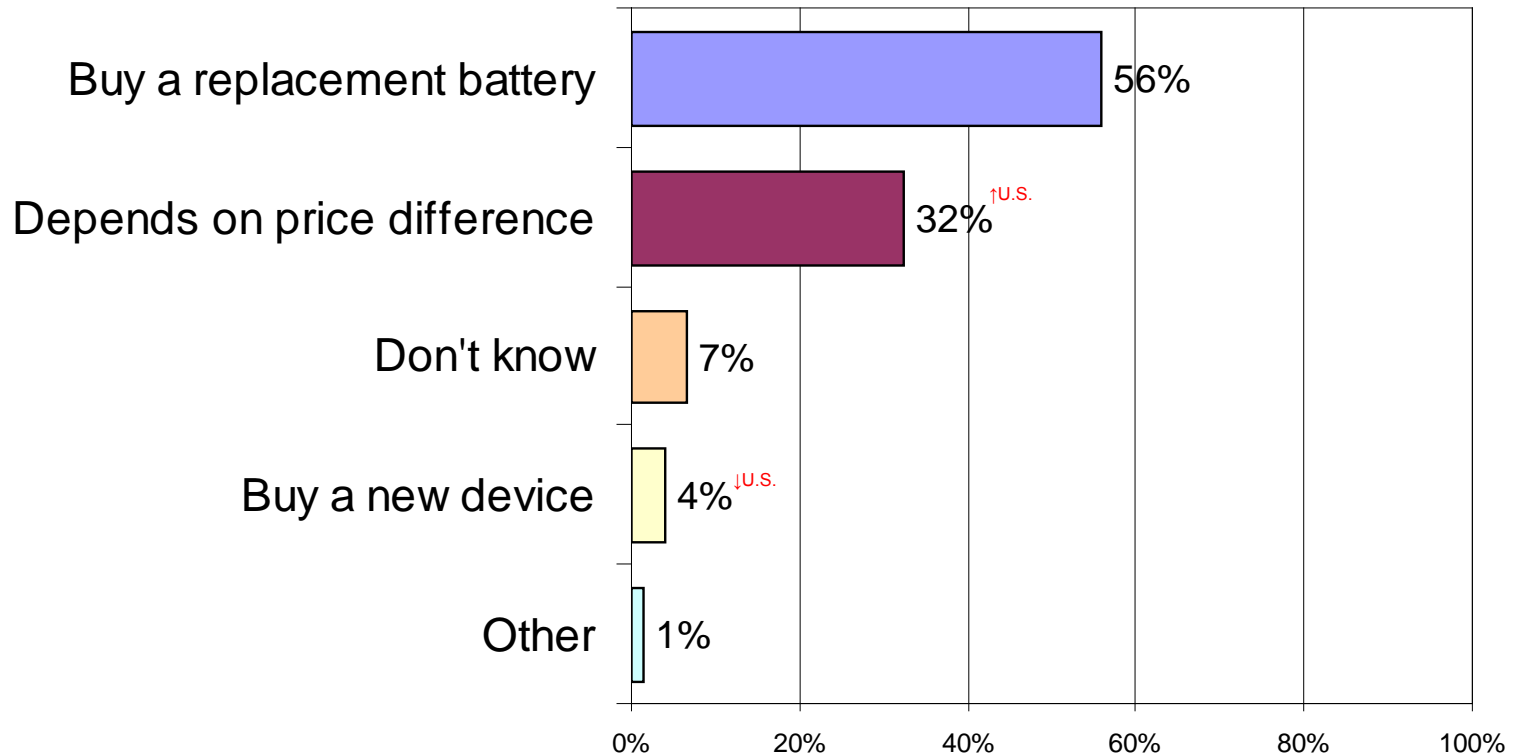


Laptop/Notebook Computer (n=3)



Note: Extremely small base sizes

When Battery Can No Longer Be Recharged...



Attitudes & Awareness of Recycling



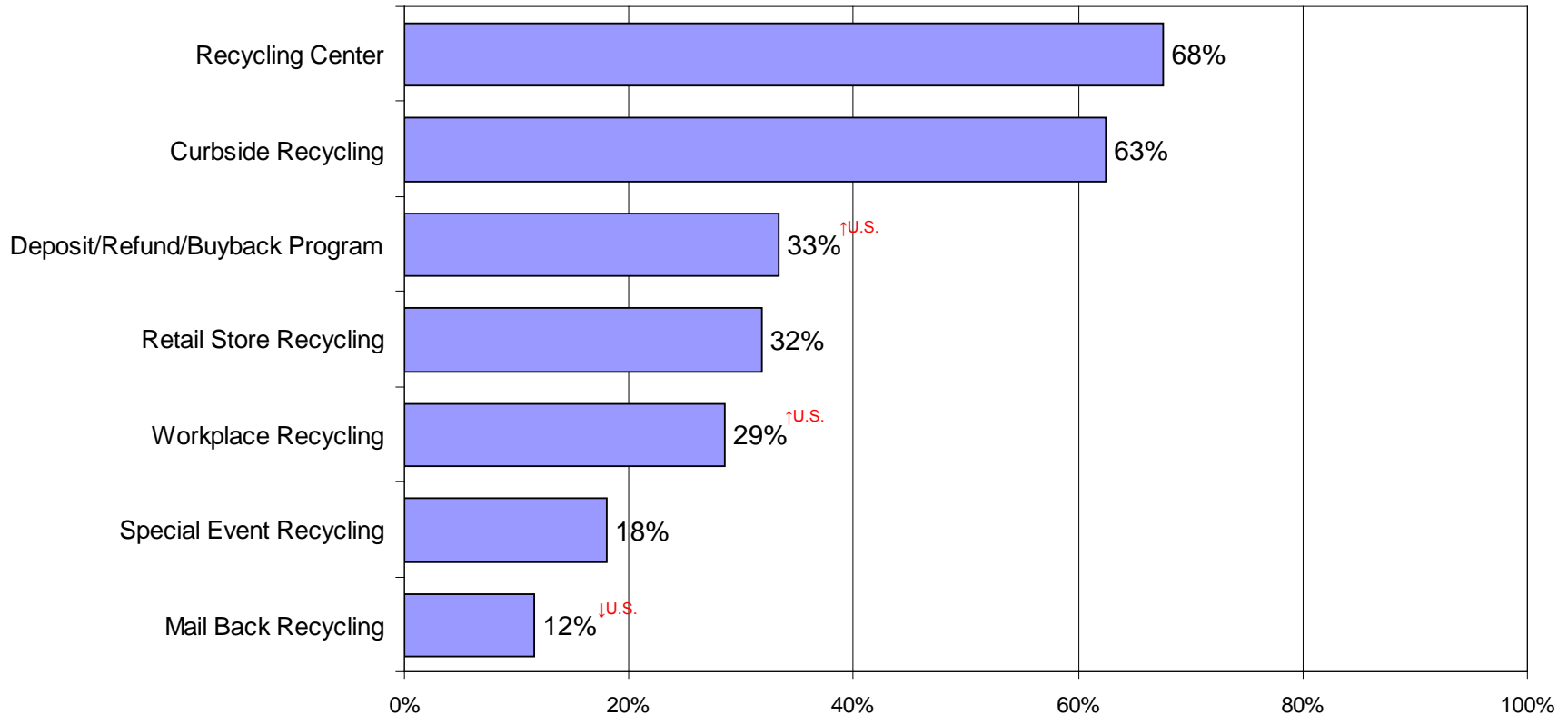
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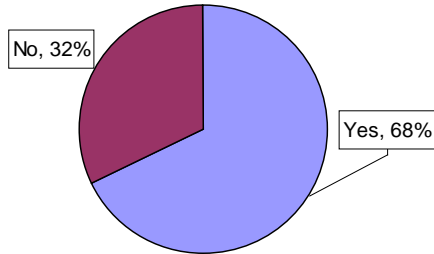
Recycling Program Awareness

“Which of the following recycling programs are you aware of?”

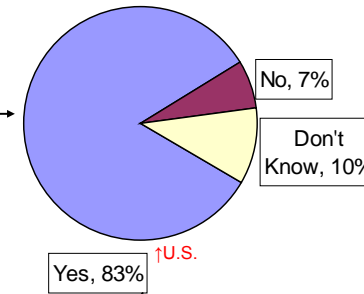


Recycling Programs- Recycling Center

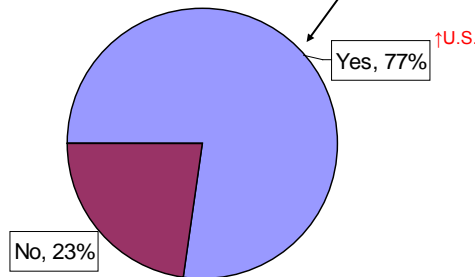
Aware of Recycling Center Recycling?



Is Program Offered in Your Area?

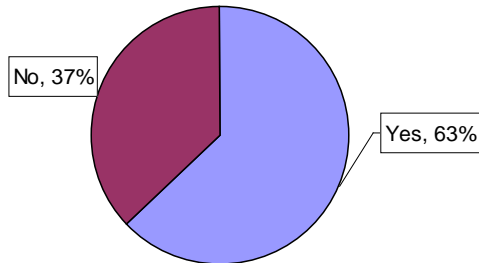


Are You Currently Participating in Program?

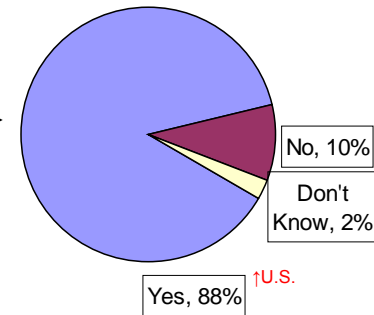


Recycling Programs- Curbside

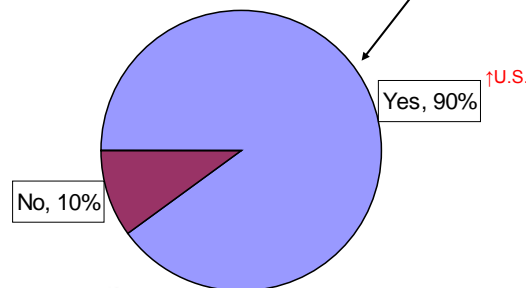
Aware of Curbside Recycling?



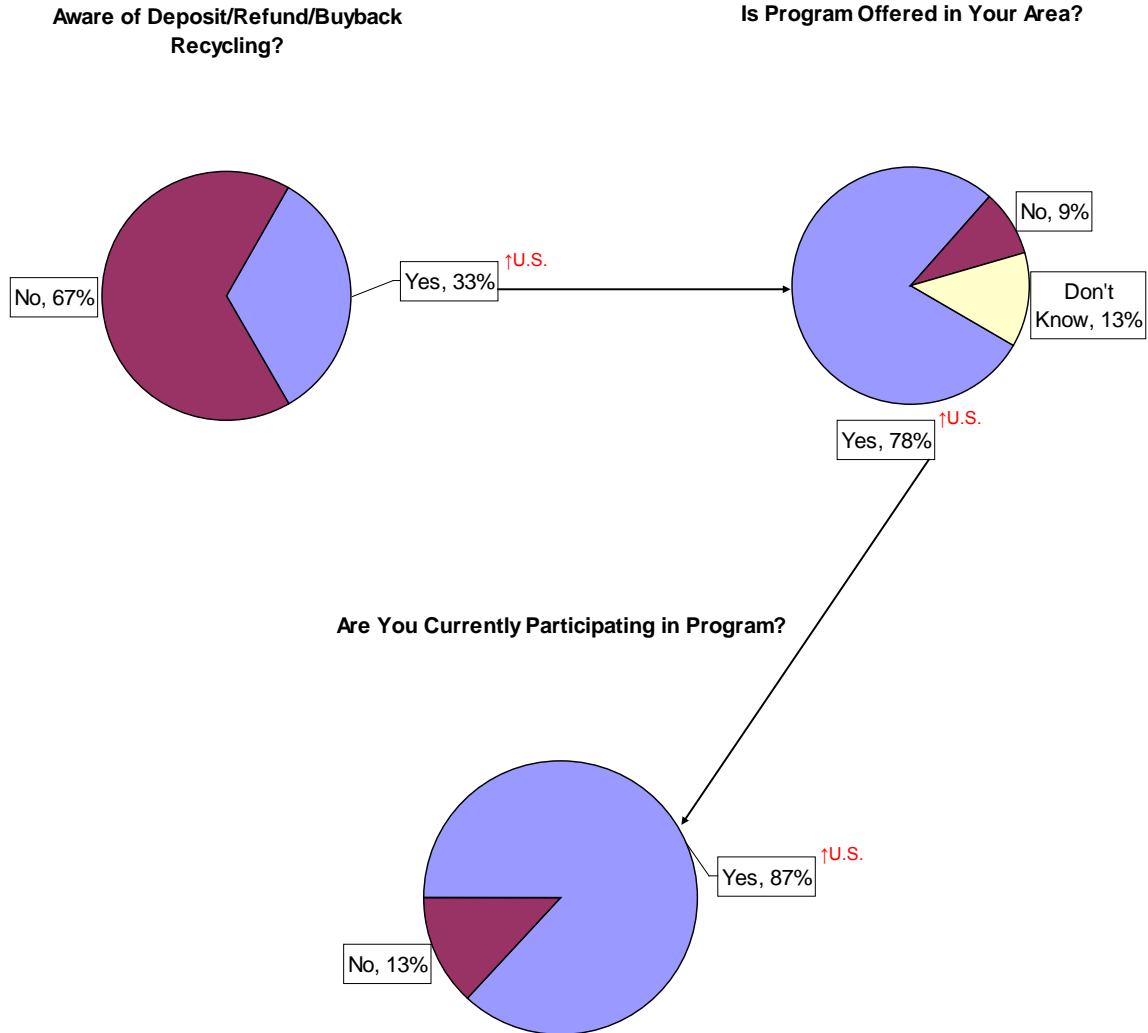
Is Program Offered in Your Area?



Are You Currently Participating in Program?

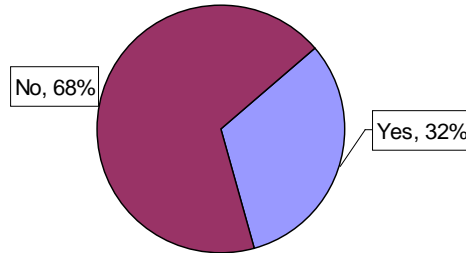


Recycling Programs- Deposit/Refund/Buyback

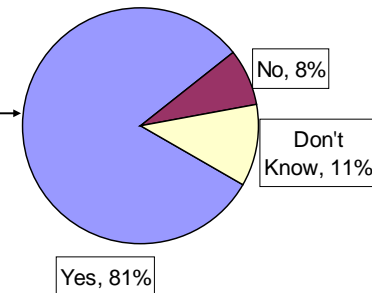


Recycling Programs- Retail Store

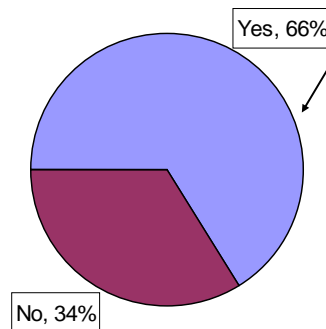
Aware of Retail Store Recycling?



Is Program Offered in Your Area?

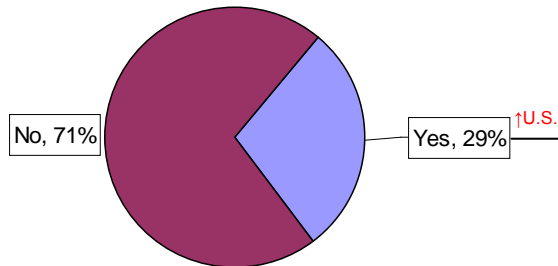


Are You Currently Participating in Program?

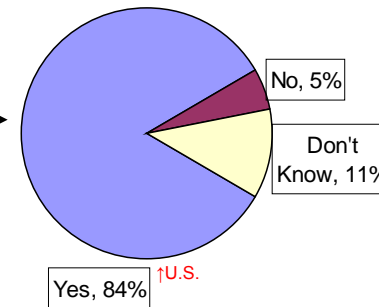


Recycling Programs- Workplace

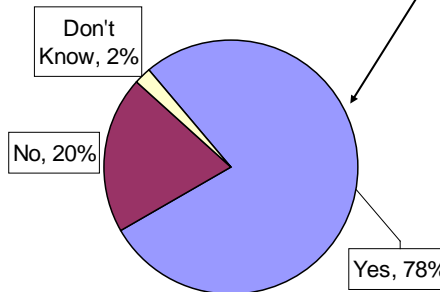
Aware of Workplace Recycling?



Is Program Offered in Your Area?

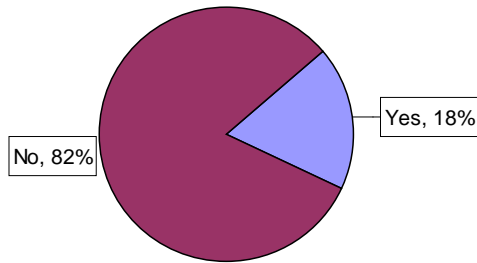


Are You Currently Participating in Program?

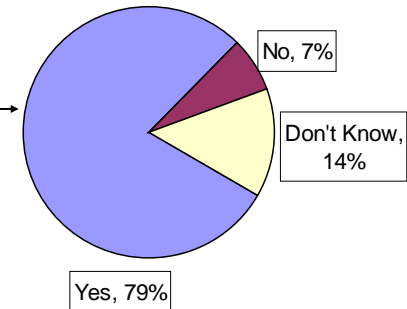


Recycling Programs- Special Event

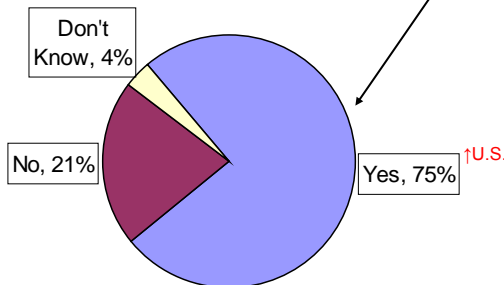
Aware of Special Event Recycling?



Is Program Offered in Your Area?

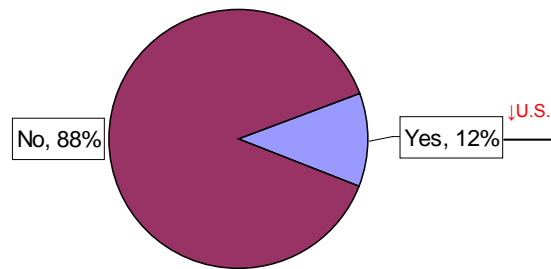


Are You Currently Participating in Program?

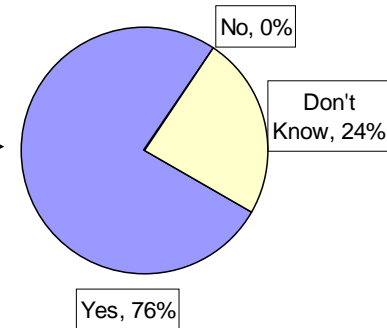


Recycling Programs- Mail Back

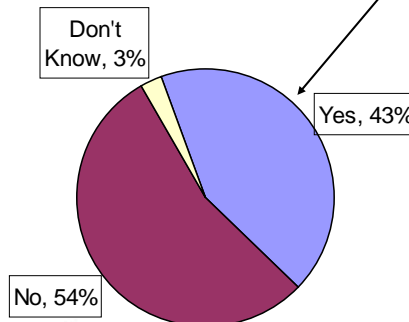
Aware of Mail Back Recycling?



Is Program Offered in Your Area?



Are You Currently Participating in Program?



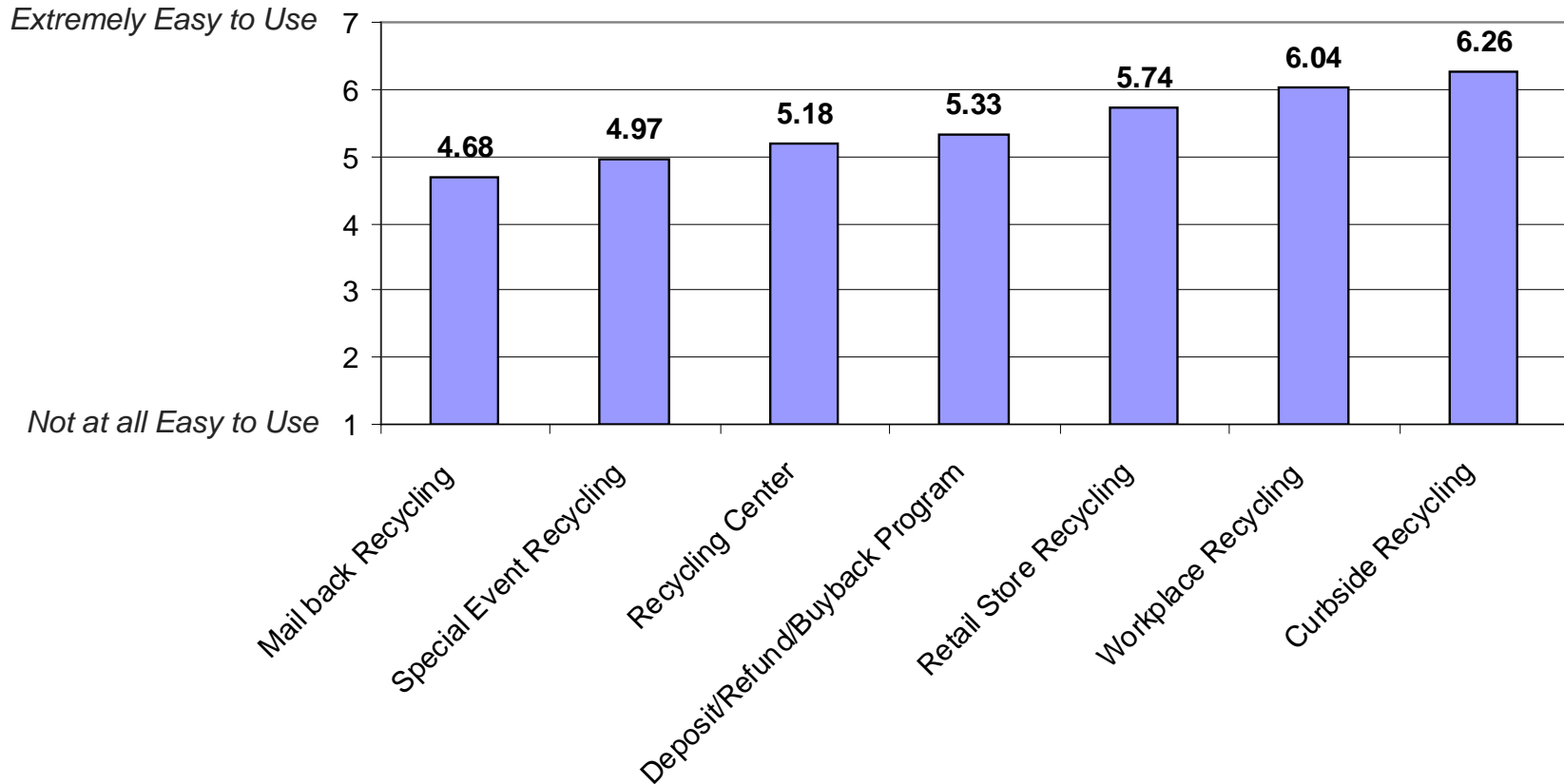
Recycling Option Effectiveness Index

The Recycling Option Effectiveness Index illustrates the relationship between current program availability and actual use (Program Availability x Program Participation).

	Aware?	Available?	Participate?	Effectiveness Index
Curbside Recycling	63%	88% ^{↑U.S.}	90% ^{↑U.S.}	0.79
Deposit/Refund/Buyback Program	33% ^{↑U.S.}	78% ^{↑U.S.}	87% ^{↑U.S.}	0.68
Workplace Recycling	29% ^{↑U.S.}	84% ^{↑U.S.}	78%	0.66
Recycling Center	68%	83% ^{↑U.S.}	77% ^{↑U.S.}	0.64
Special Event Recycling	18%	79%	75% ^{↑U.S.}	0.59
Retail Store Recycling	32%	81%	66%	0.53
Mail Back Recycling	12% ^{↓U.S.}	76%	43%	0.33

Program Ease of Use

*"How would you rate the overall ease of use of this program?
(asked of those aware of each program)"*

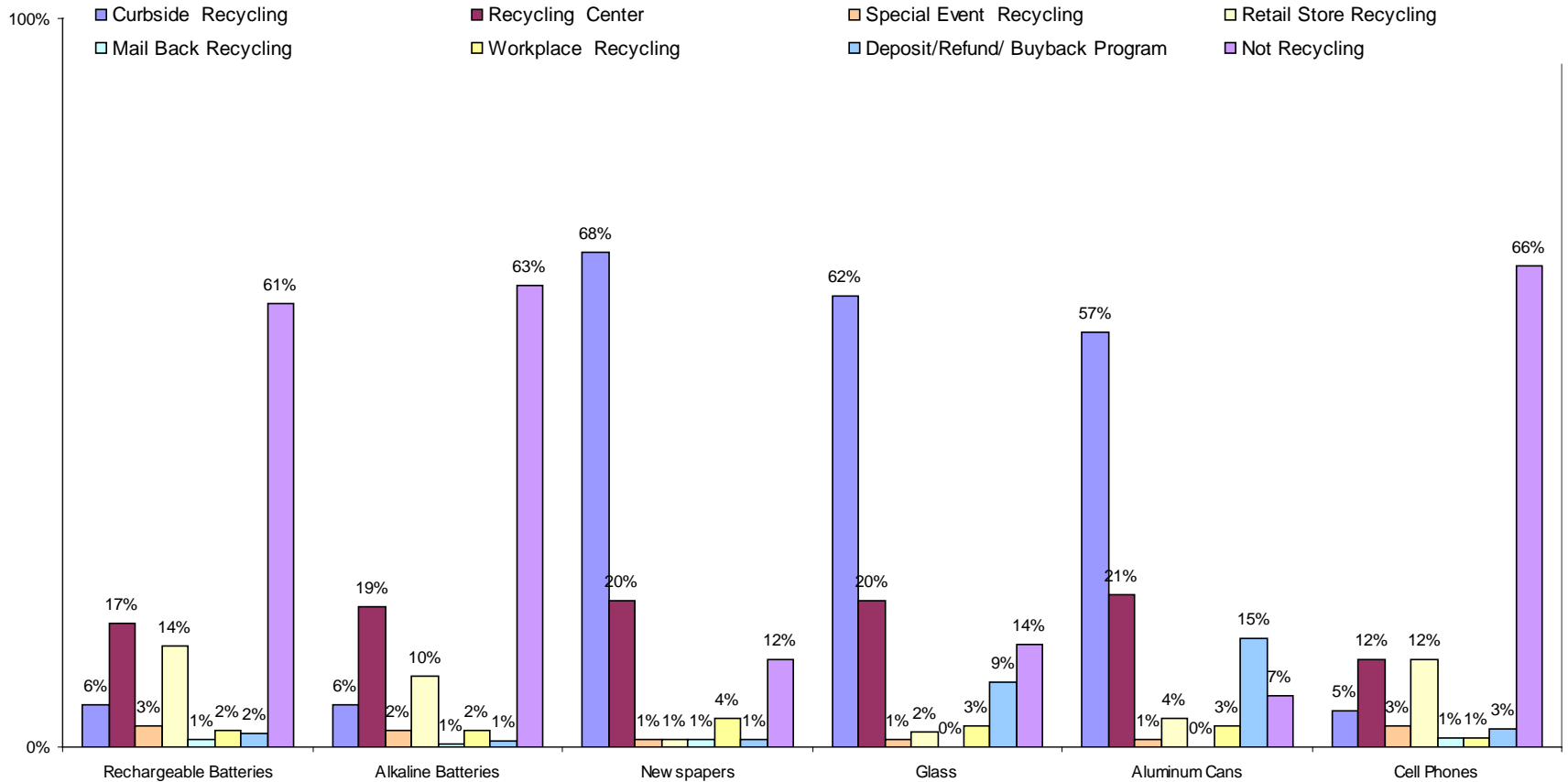


Items Think Can Be Recycled at Various Locations

"Which of these recycling programs...can be used to dispose/recycle each of these items?"

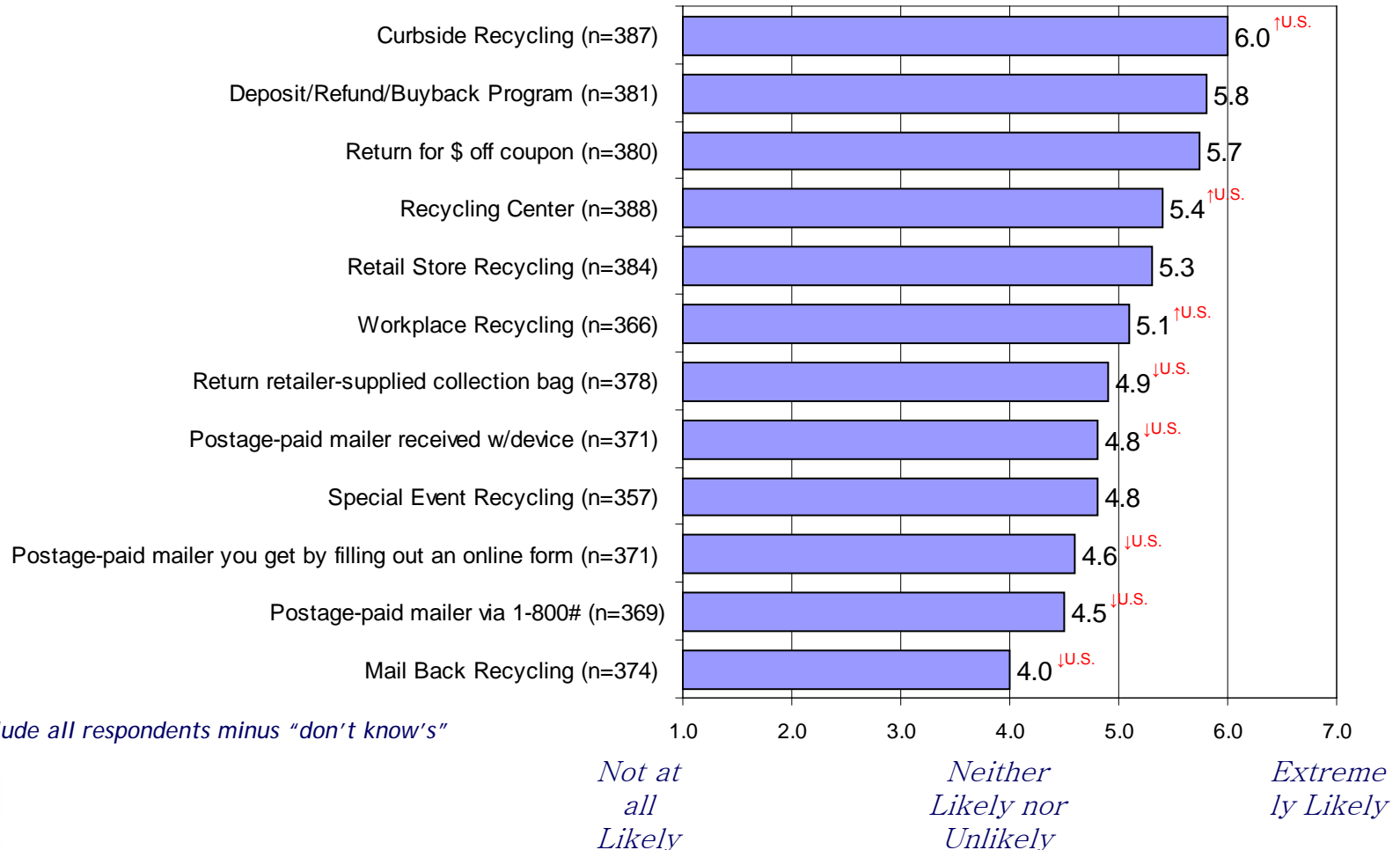
	Curbside Recycling	Recycling Center	Special Event Recycling	Retail Store Recycling	Mail-Back Recycling	Workplace/ Onsite Recycling	Deposit/ Refund Buy-Back Program	Don't Know	None of These
Rechargeable Batteries	10.3%	43.5% ^{↑U.S.}	14.5% ^{↓U.S.}	32.8%	9.5% ^{↓U.S.}	8.8%	8.3%	26.8%	2.0%
Newspapers	81.0% ^{↑U.S.}	45.0% ^{↑U.S.}	6.3% ^{↓U.S.}	4.0%	1.8%	16.0%	2.5%	4.0%	0.8%
Glass	74.8% ^{↑U.S.}	44.3% ^{↑U.S.}	7.3% ^{↓U.S.}	5.5%	0.8%	12.5% ^{↑U.S.}	15.0% ^{↑U.S.}	5.0% ^{↓U.S.}	0.0%
Aluminum Cans	70.8% ^{↑U.S.}	46.0% ^{↑U.S.}	7.5% ^{↓U.S.}	7.8%	1.0%	13.3%	21.0% ^{↑U.S.}	3.8%	0.0%
Cell Phones	5.8%	29.8% ^{↑U.S.}	15.8% ^{↓U.S.}	32.5%	7.8% ^{↓U.S.}	5.0%	9.8% ^{↓U.S.}	35.0%	32.8% ^{↑U.S.}
Alkaline Batteries	8.5% ^{↓U.S.}	39.0% ^{↑U.S.}	13.8% ^{↓U.S.}	21.3%	3.5% ^{↓U.S.}	7.0%	5.3%	32.8%	4.5%

Items Currently Recycling



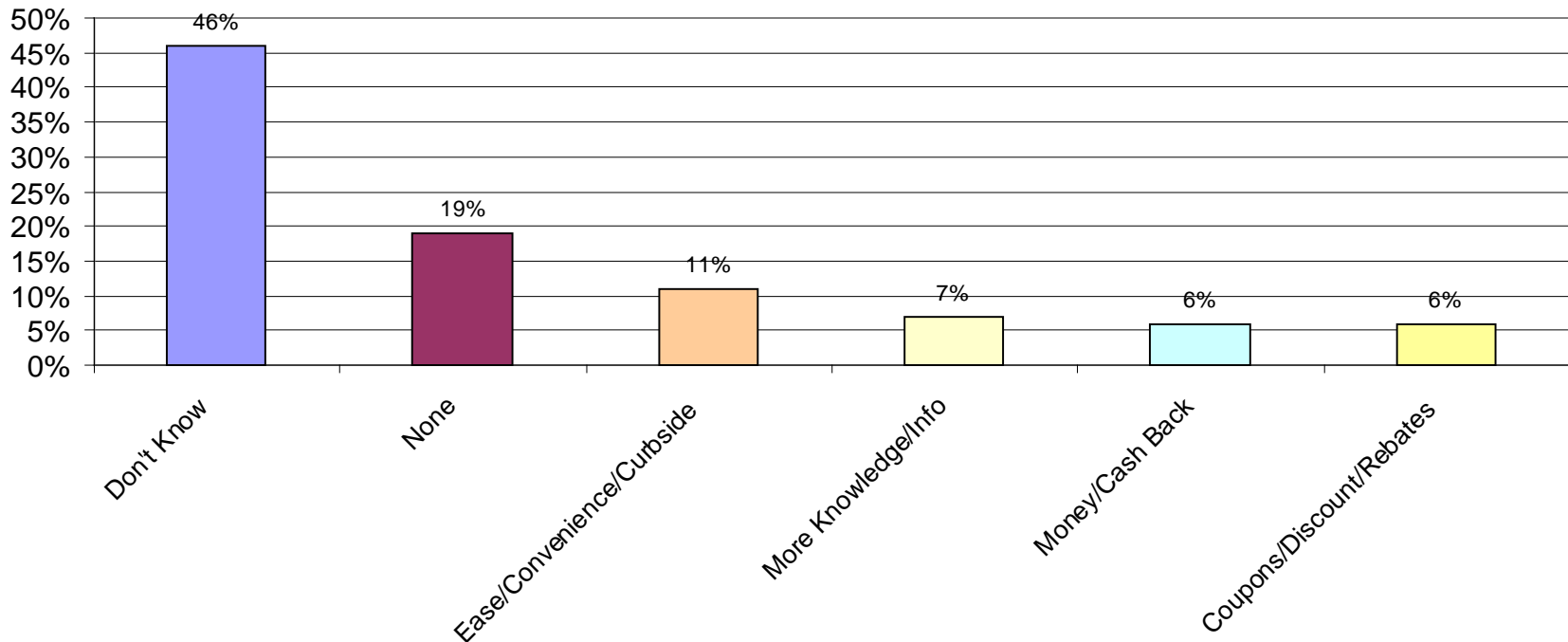
Likelihood to Recycle if Program is Available

(Thinking ONLY about rechargeable batteries that won't hold a charge anymore)

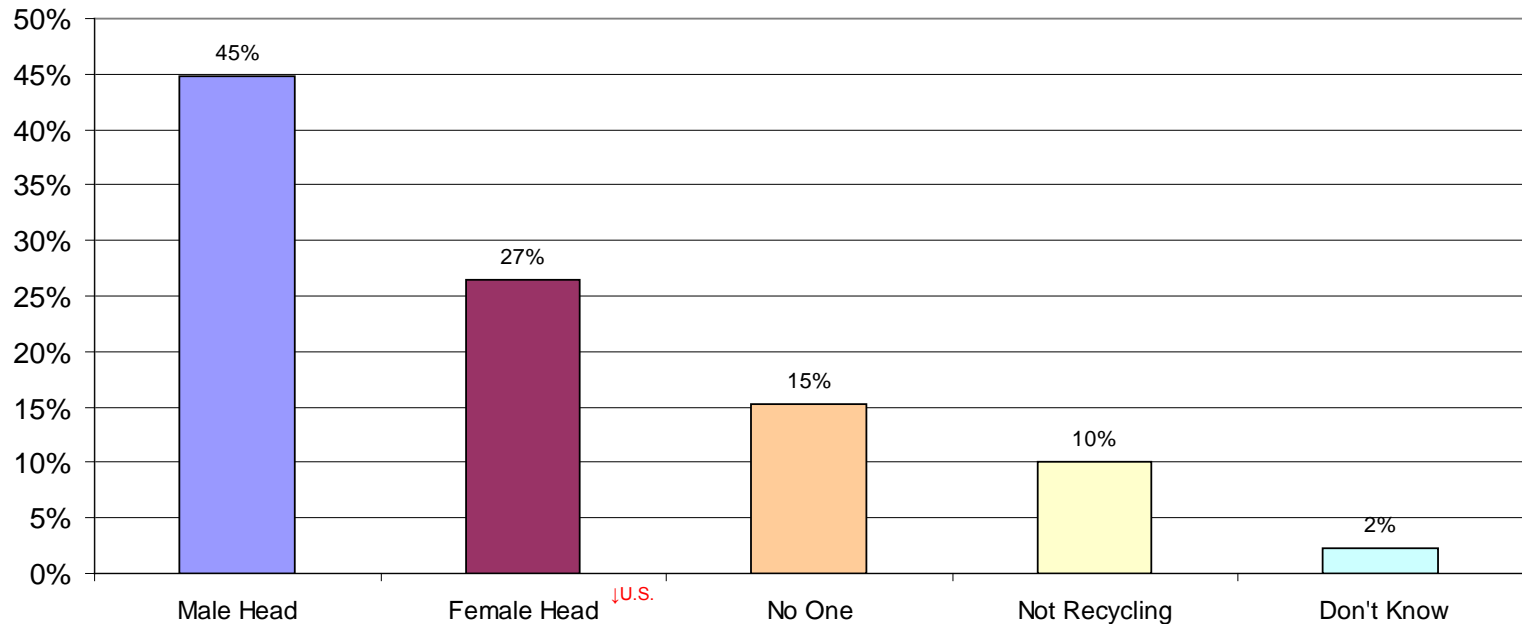


Recycling Incentives

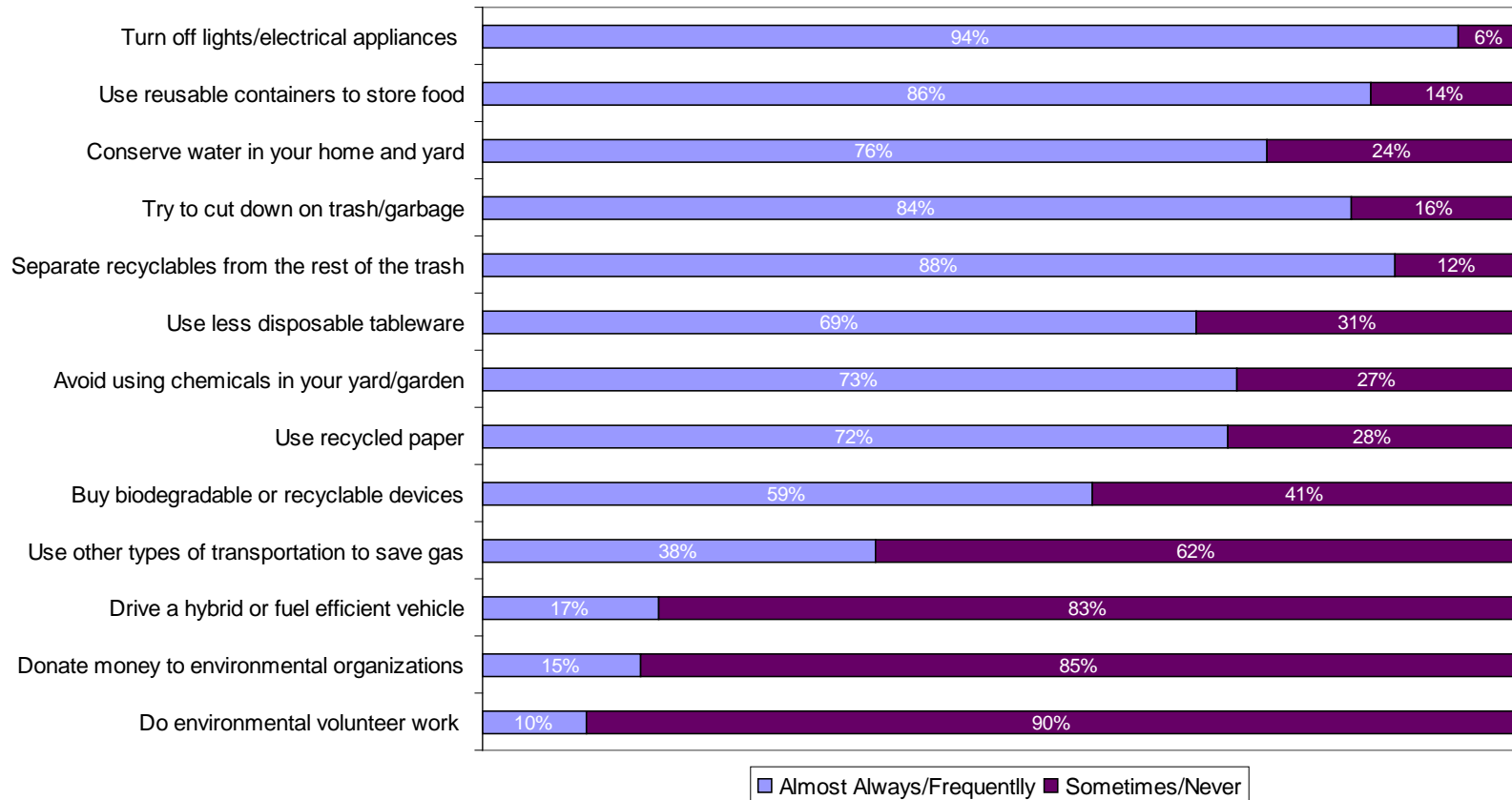
“What other incentives would prompt you to recycle rechargeable batteries?”



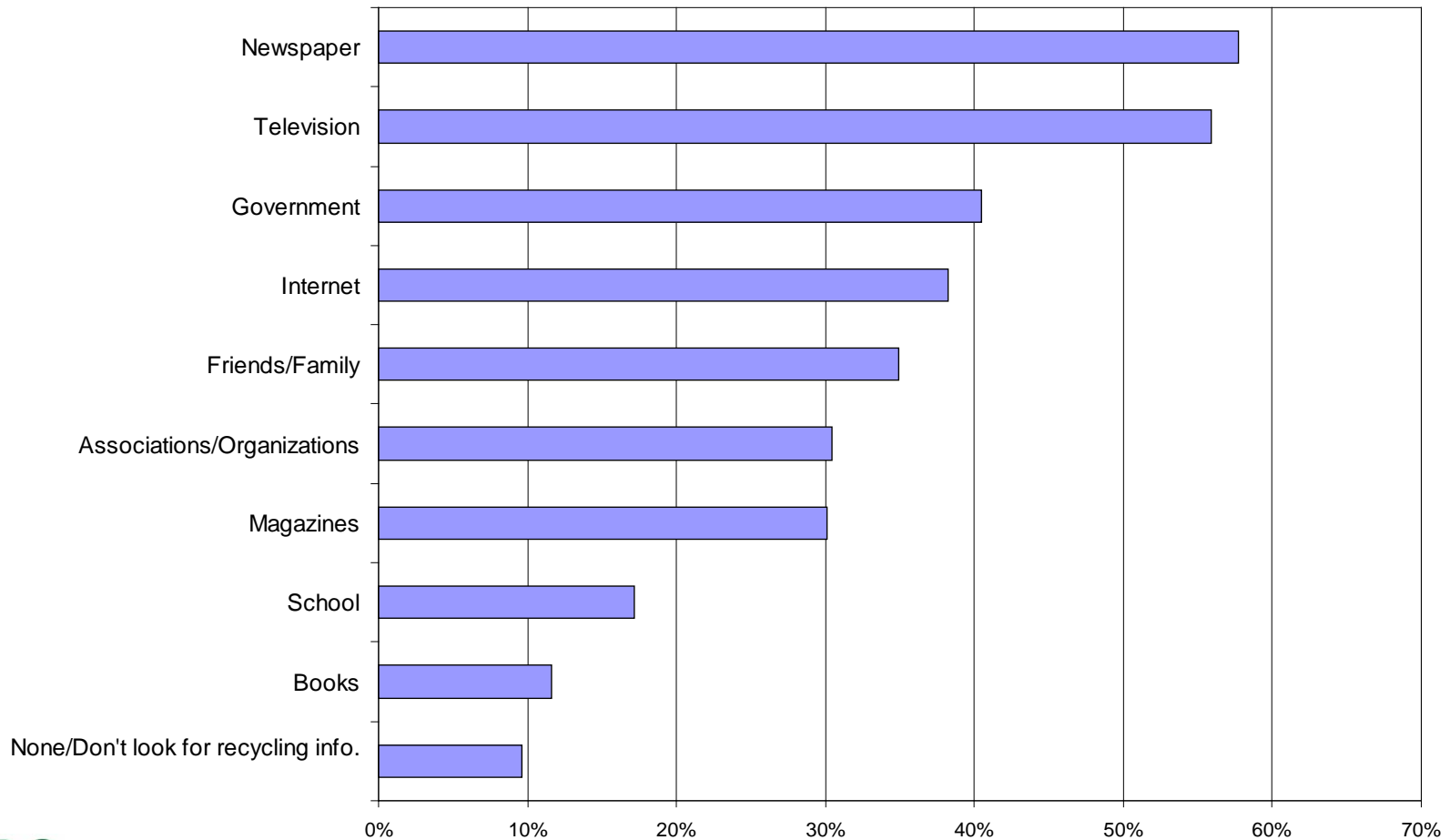
Household Member in Charge of Recycling



Day-to-Day Activity



Information Resources for Recycling



Lifestyles & Demographics



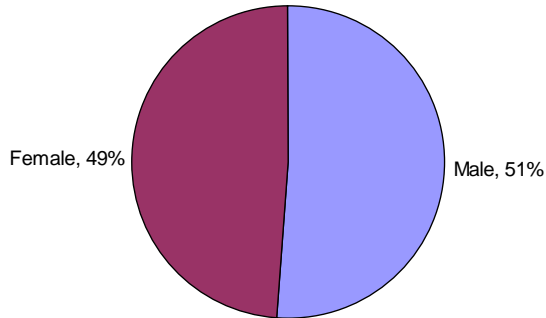
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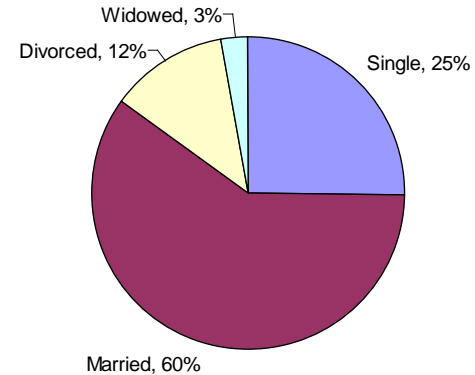
Your Compass for the Marketplace.

General Demographics

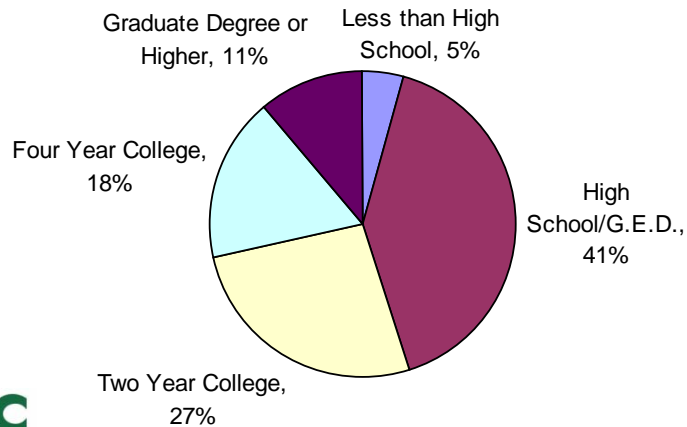
Gender



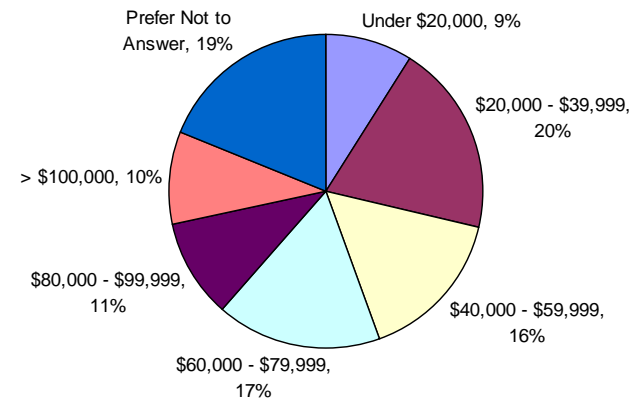
Marital Status



Education

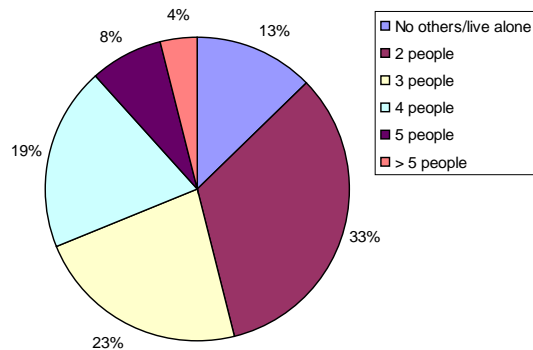


Income

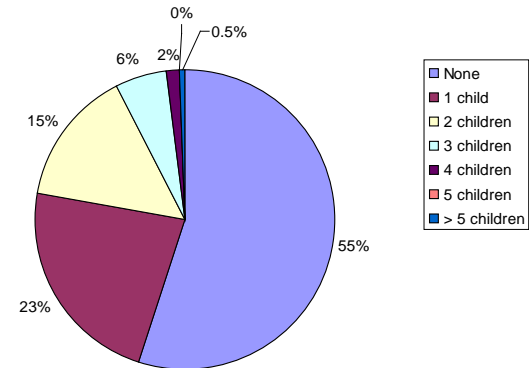


General Demographics

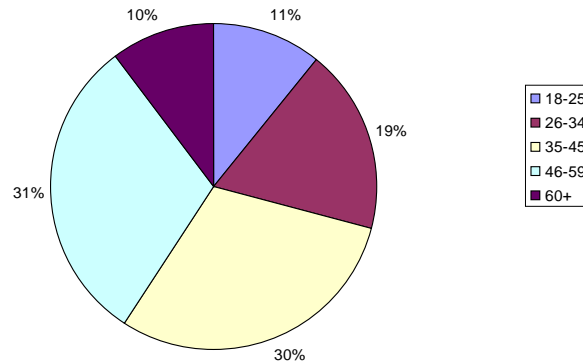
People Regularly Living in Household



Children Under 18 Living in Household



Age



RBRC

RECHARGEABLE
B A T T E R Y
R E C Y C L I N G
C O R P O R A T I O N

Builder Awareness Study

November 21, 2006



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- ❖ **Attitudes & Awareness of Recycling**
- ❖ **Logo/Collection Box Recognition**
- ❖ **Lifestyles & Demographics**

Executive Summary



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Introduction

RBRC contracted with Polaris Marketing Research, Inc. to conduct custom survey research to identify:

- recycling habits, attitudes and rates,
- hoarding practices,
- level of knowledge of recyclable, rechargeable batteries,
- awareness of rechargeable battery recycling and
- preferred recycling methods.

Research Goal: Help RBRC meet their ultimate objective of increasing battery recycling collections by identifying and understanding how to motivate potential recyclers.

Methodology

To measure the current state of the rechargeable battery market, the project was designed with the following specifications:

- ❖ Respondents randomly recruited from an Internet panel and Internet-based surveys were conducted.
- ❖ 400 total surveys were completed
- ❖ Margin of Error at 95% confidence level
 - Sample size of 400 = $\pm 4.9\%$

Overall Results

35% of builders have recycling programs.

- Most builders have not found the trend towards “green” or environmentally friendly building practices as having an impact on their business.
 - 23% of builders rated the impact a 6 or 7 on a 7-point scale, with 7 being “Extremely Impactful.”
 - 64% of builders rated the impact a 3,4 or 5 on a 7-point scale, with 4 being “Neither Impactful nor Unimpactful.”
- Most builders (47%) estimate the percentage of materials on their worksite that are recycled to be well under half of all materials used.

Recommendations

General

- As with consumers, education is key:
 - The message “rechargeable batteries are recyclable” needs to be emphasized. Regardless of device, awareness of what can be recycled was relatively low.
- Builders are very similar to consumers in their awareness and participation in recycling programs. The greatest opportunity for RBRC to increase recycling with this group is to promote builder worksite recycling programs. By making it easy and available, builders may be more likely to participate.
- Builders stated they would be most likely to recycle if an incentive was offered. Possible incentives selected were coupons or deposit/refund/buyback programs. If such incentives can be arranged with retail stores or device manufacturers, builders may be more likely to recycle.

Recommendations

- RBRC should target large and medium builders (perhaps with revenue over \$500K) for developing recycling programs.
 - Builders who are most likely to have recycling programs tend to do commercial work, where recycling is a project requirement. They also tend to be larger organizations, with revenue over \$1M.
- Additionally, if RBRC can persuade developers to require contractor participation in the recycling program, it is even more likely to be successful.
- Participation with relevant developers and contractor trade associations could be a good vehicle for targeting messages to this segment.

Recommendations

Logo/Box Recognition

- While recognition of the logos and collection boxes was higher among builders, it was still relatively low at around 20%
- Ensure boxes are placed in key areas of retail stores (e.g. contractor section of home improvement stores) and
- Consider using only one logo for RBRC's identity -
 - Multiple logos can send mixed messages and be confusing --consider creating one brand identity so RBRC (and its message) is easily recognizable.
 - Include the phone number in any new logo -- potential recyclers need look no further for recycling information.
 - Display the single logo prominently on all RBRC promotional materials and any other key points of contact (i.e. website, newspaper bags, etc).

Rechargeable Battery Current Usage State



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Current Ownership

➤ The three devices owned* the most were:

- 1) Two-Way Radio
- 2) Cordless Drill/Hammer
- 3) Cordless Flashlight

➤ The three devices used* the most were:

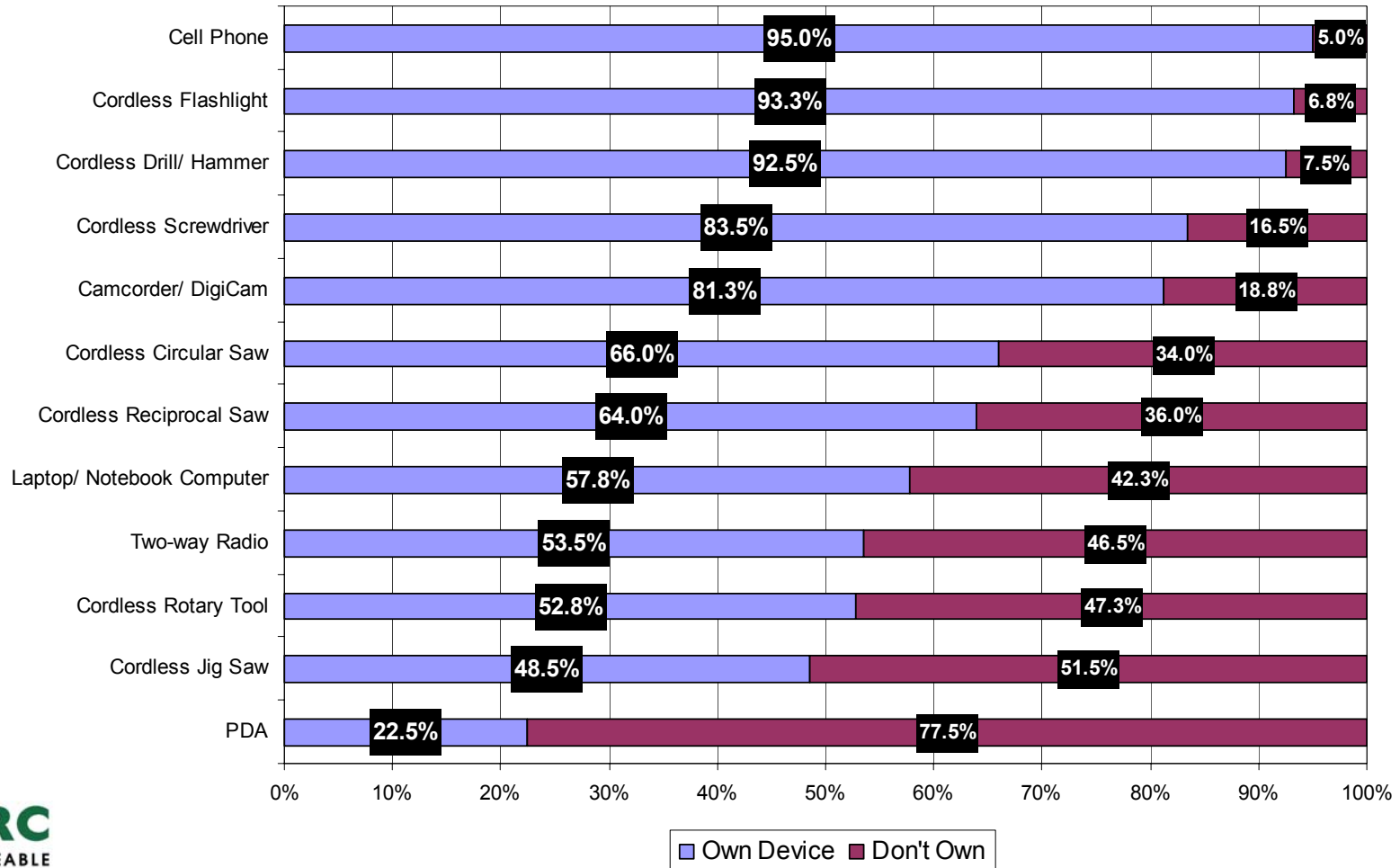
(Cordless Flashlight, Cellular Phone, PDA, Laptop/Notebook Computer, and Camcorder/Digital Camera excluded)

- 1) Cordless Drill/Hammer
- 2) Cordless Circular Saw
- 3) Cordless Screwdriver

* Reported without “Outliers.” More than 30 devices owned were categorized as Outliers and removed to stabilize data. No more than 8 respondents were removed per category.

Current Ownership

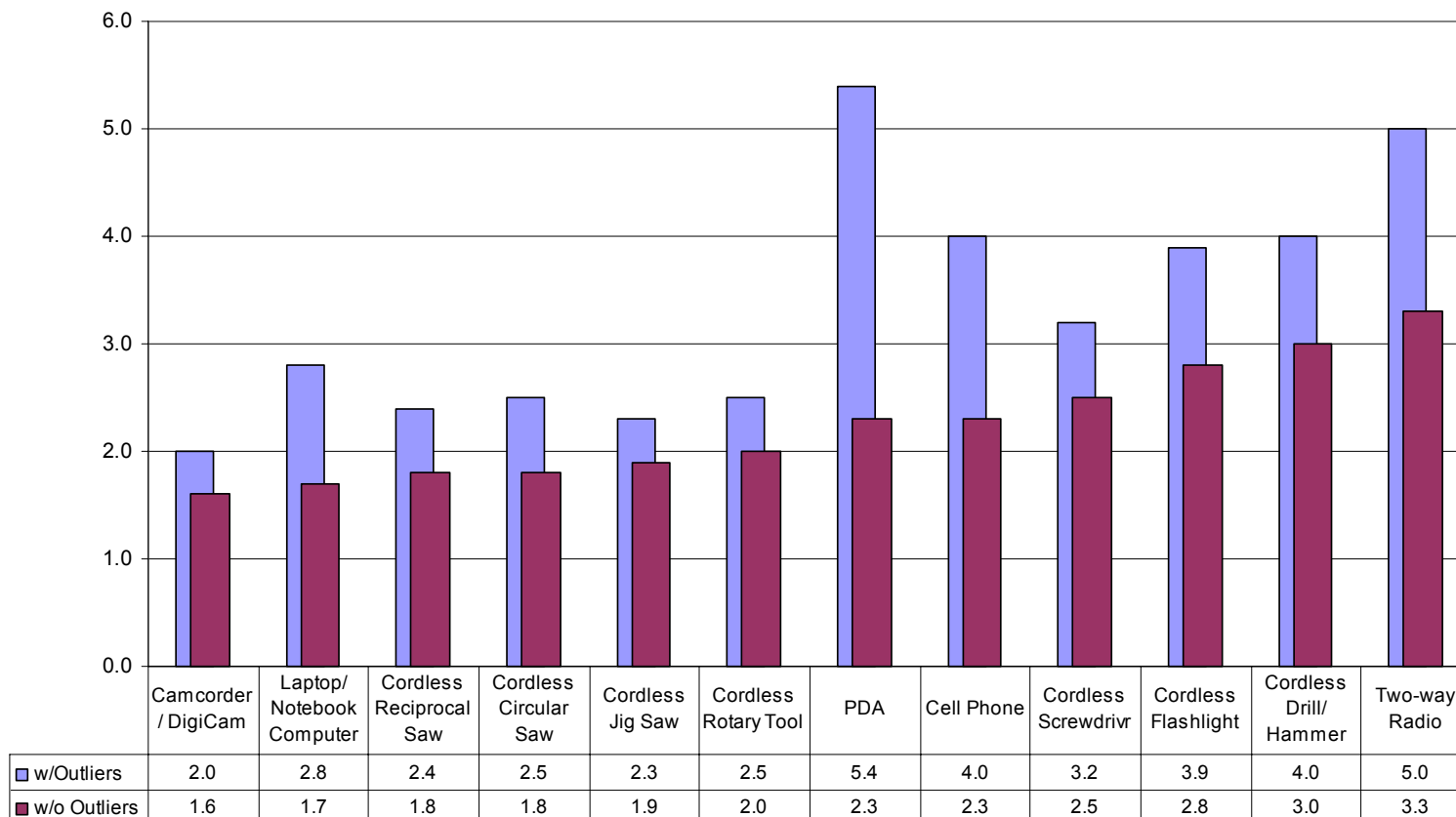
Percent Owning One or More Devices



Base=400

Current Ownership

Mean Number of Devices Owned



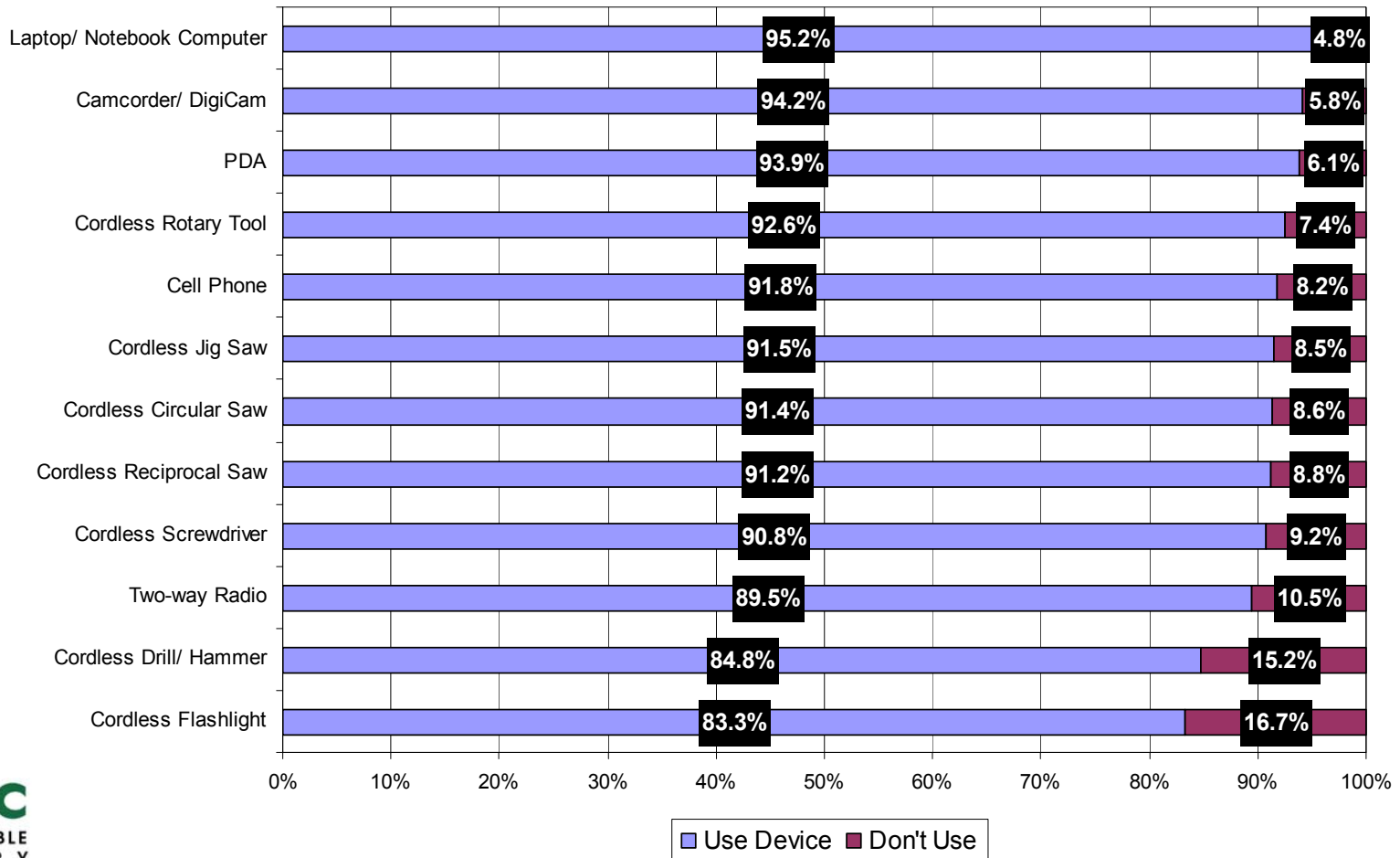
■ w/Outliers ■ w/o Outliers

Outliers = more than 30 devices owned. No more than 8 respondents removed per category.

Base=400

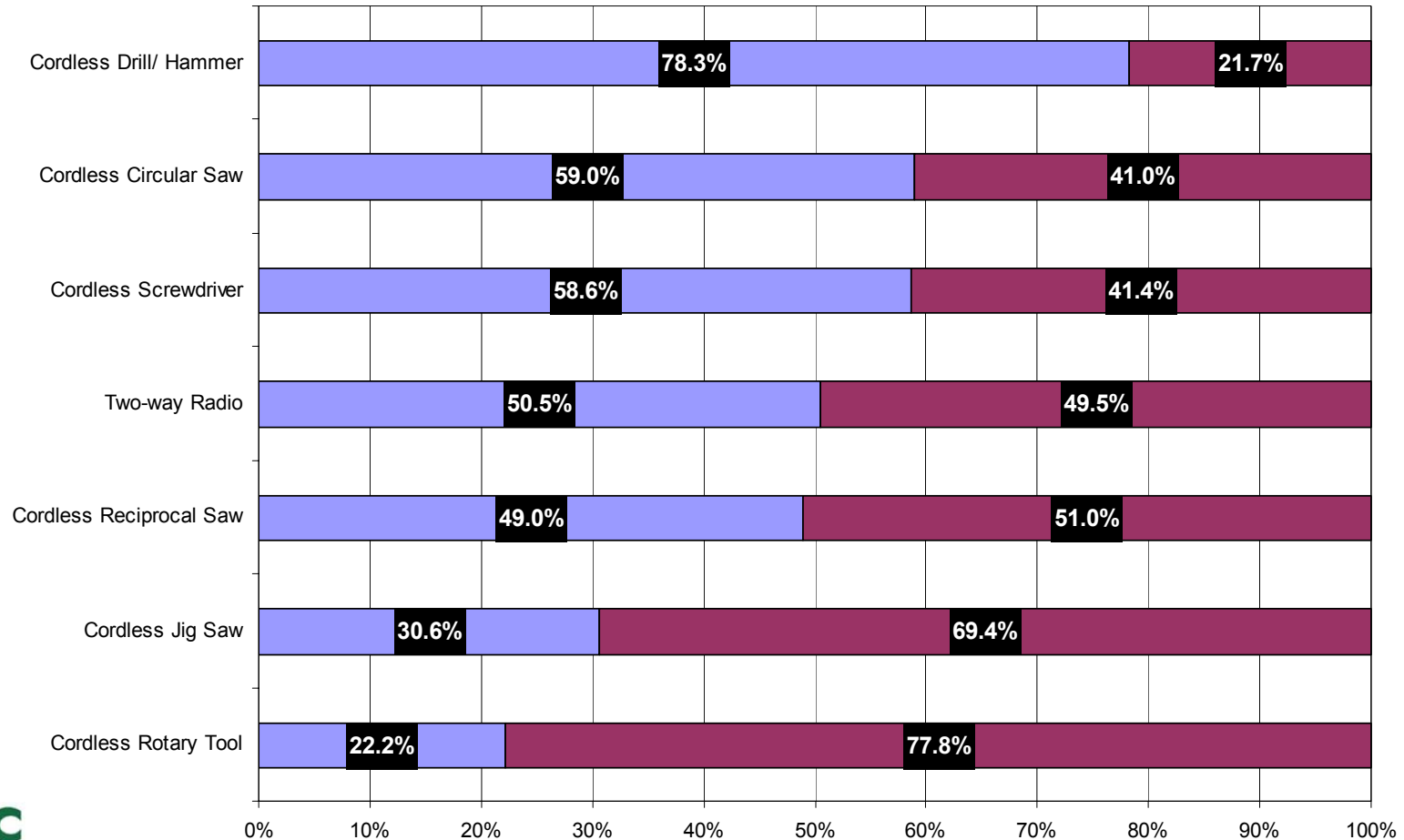
Current Usage

Percent of Devices Still Being Used



Current Usage

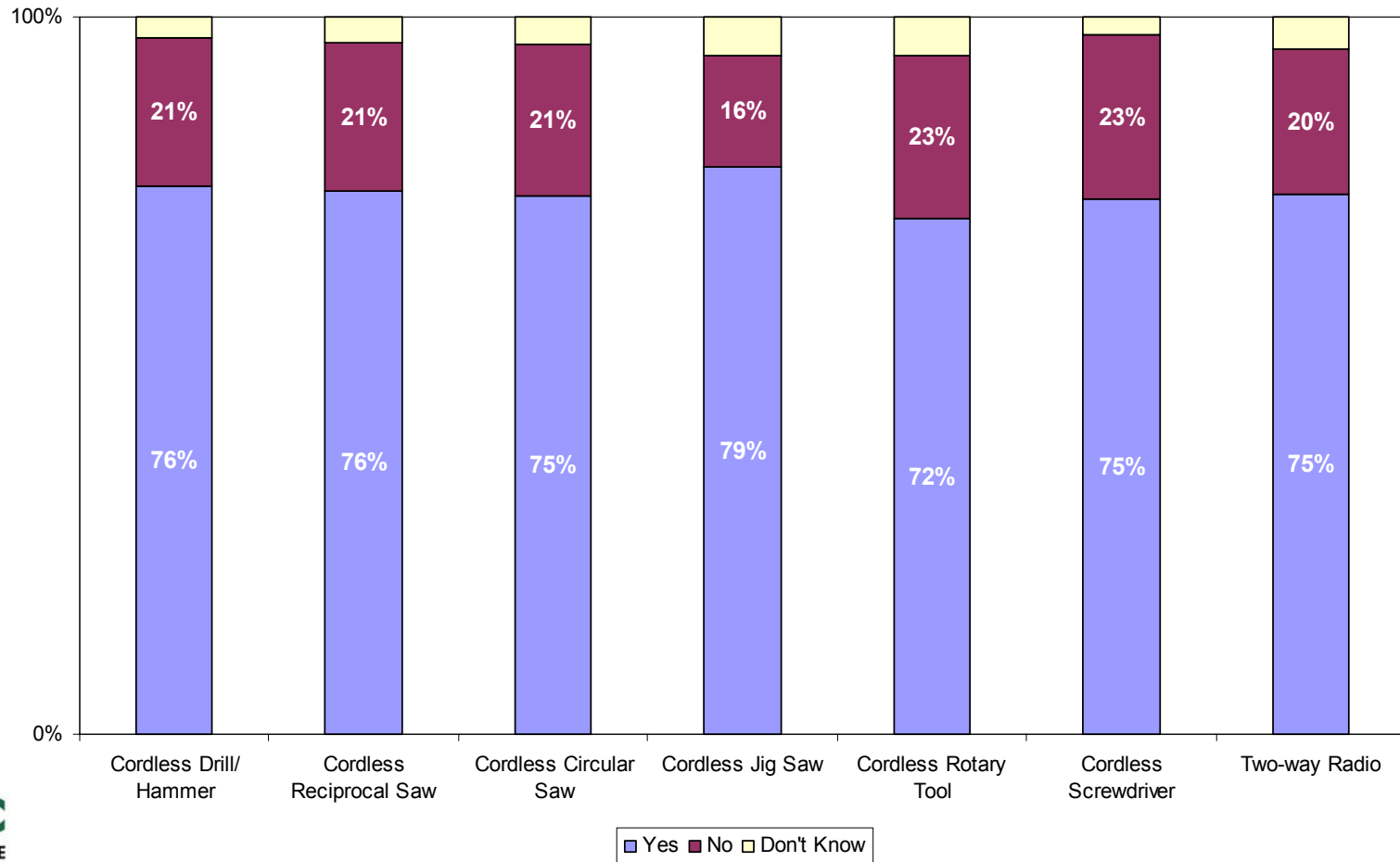
Top 3 Most Used Cordless Tools



Base=400

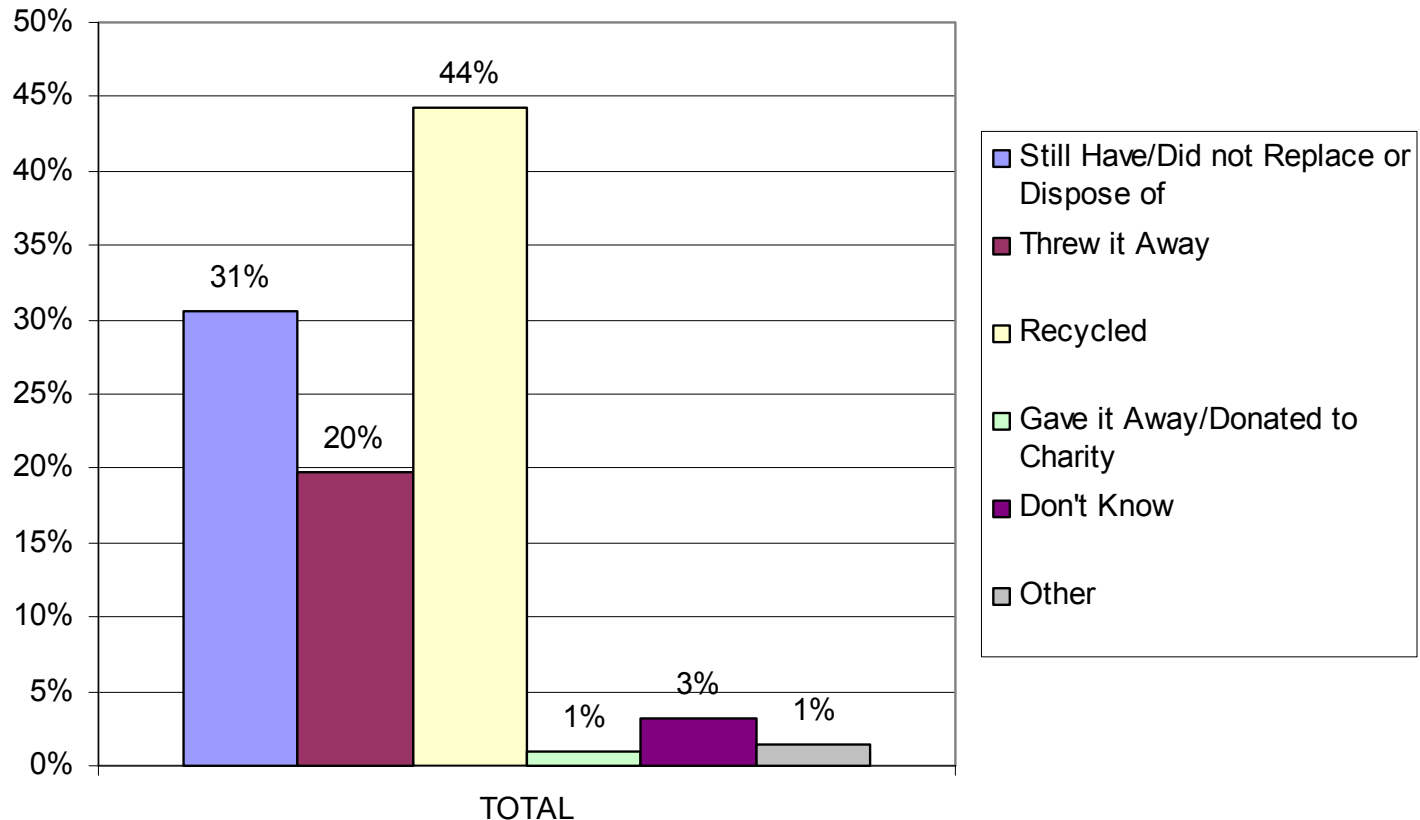
Battery Change/Replacement

Percent That Have Changed/Replaced a Battery



What Happened to Device's Original Battery?

Base= Yes, changed or replaced the battery for...?" for all devices combined



"Recycled" includes: Put it in curbside Recycling, Took it to a Recycling Center, Put it in Retail Store Dropoff Box, Left it with a Retail Store Employee, Sent it to Manufacturer

What Happened to Device's Original Battery? (continued)

- ❖ Most either recycled (44%) or still have (31%) the battery they replaced (recycle rates higher among builder than consumers- 44% vs. 34%, respectively)
 - Products w/higher battery Throw-away rates:
 - two-way radio
 - cordless screwdriver
 - Products w/lower battery Throw-away rates:
 - cordless jig saw
 - cordless circular saw
 - Products w/higher battery Recycle rates:
 - cordless cut-out/rotary tools
 - cordless jig saw
 - Products w/lower battery Recycle rates:
 - cordless drill/hammer/driver
 - Products w/higher battery Retention rates:
 - cordless drill/hammer/driver
 - cordless circular saw
 - Products w/lower battery Retention rates:
 - two-way radio

Base= 1347 or Those answering "Yes" to "Have you ever changed or replaced the battery for...?" for all devices combined

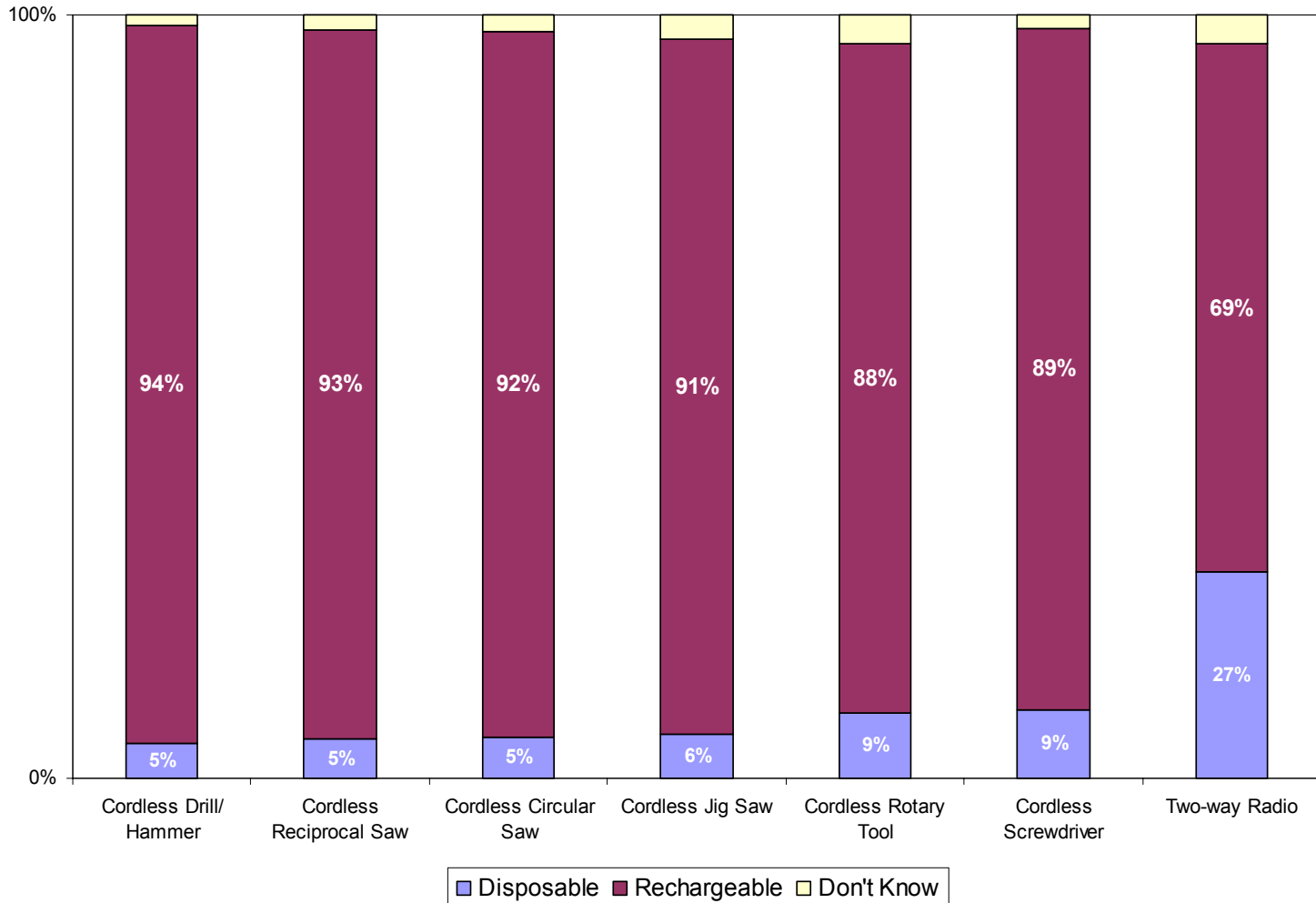
"Recycled" includes: Put it in curbside Recycling, Took it to a Recycling Center, Put it in Retail Store Dropoff Box, Left it with a Retail Store Employee, Sent it to Manufacturer

What Happened to Device's Original Battery? (continued)

Products by Recycling Method:

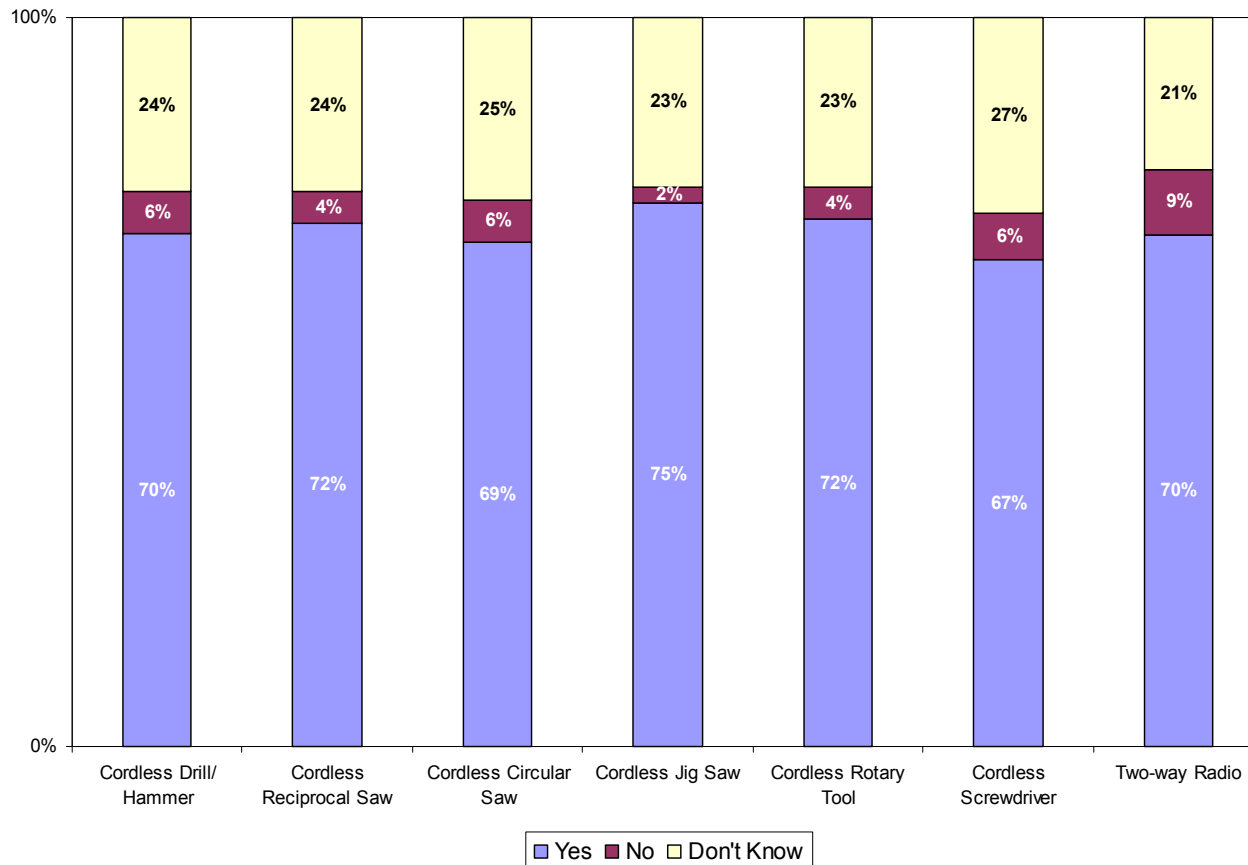
- ✓ Cordless cut-out/rotary tool batteries were more likely to be taken to a recycling center than other devices.
- ✓ Cordless circular saw and two-way radio batteries were more likely to be left with a retail store employee than other devices.
- ✓ Cordless jig saw and cordless cut-out/rotary tool batteries were more likely to be put in a retail store recycling box than other devices.

Are Batteries Disposable or Rechargeable?



Are Your Rechargeable Batteries Recyclable?

As seen with consumers, regardless of device, many people do not know rechargeable batteries are recyclable...



Respondents who answered "Rechargeable" to "Are the batteries contained within the unit Disposable (Single Use) or Rechargeable?" were then asked:
"Do you think the rechargeable battery in the device can be recycled?"

Recycling Practices



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Recycling Practices Among Builders

Most builders have not found the trend towards “green” or environmentally friendly building practices has had an impact on their business.

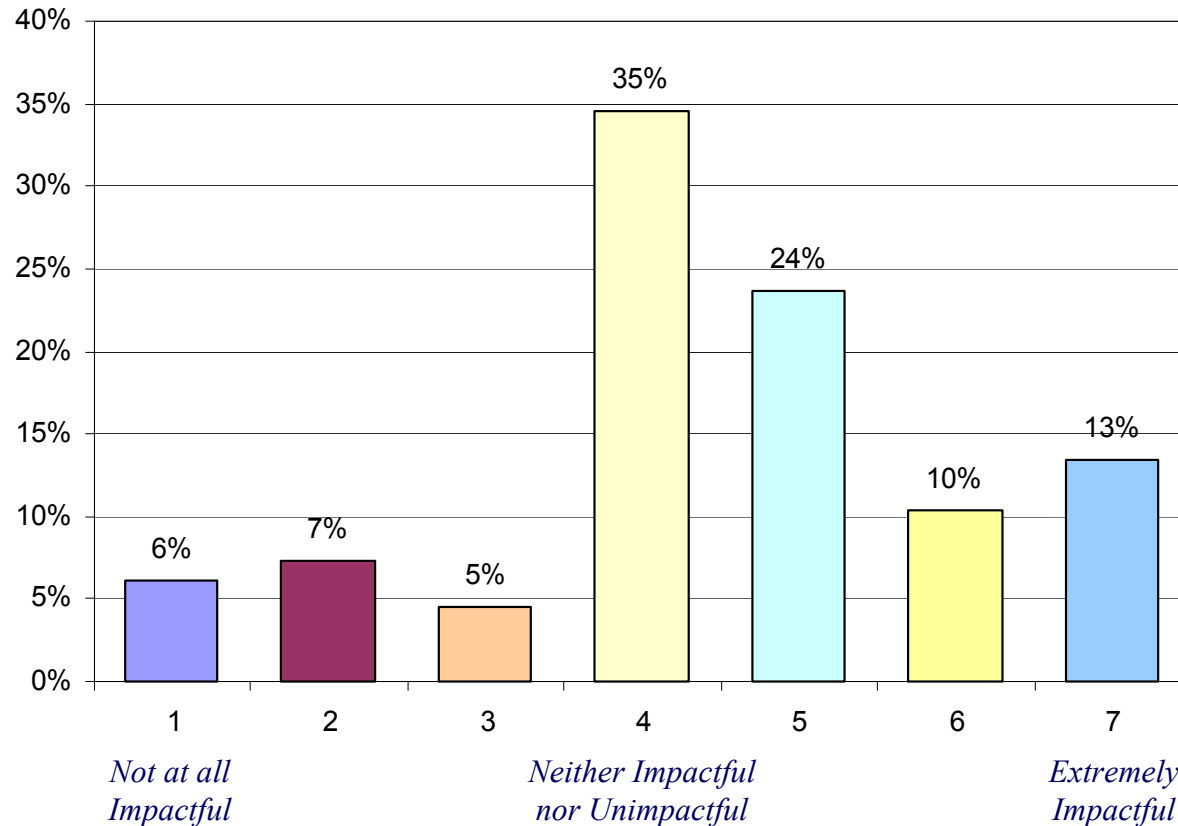
- ❖ 23% of builders rated the impact a 6 or 7 on a 7-point scale, with 7 being “Extremely Impactful.”
- ❖ 64% of builders rated the impact a 3, 4 or 5 on the 7-point scale, with 4 being “Neither Impactful nor Unimpactful.”

Similar, builders do not widely have recycling programs

- ❖ 35% of all builders reported having a recycling program.
- ❖ 60% of builders do not have a recycling program.

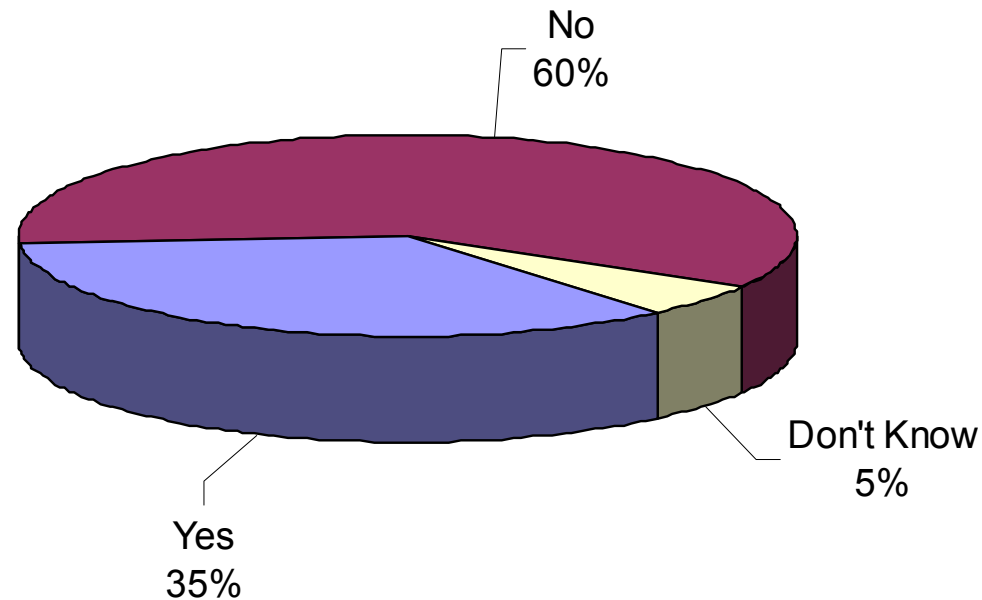
Impact of Green Construction on Business

“How much of an impact has the trend towards “green” or environmentally friendly construction had on your business?”



n = 400

Does Your Company Have a Recycling Program?



n = 281 (Business Owner/General Contractor with employees or Business Owner/General Contractor, sole proprietor, or Business Employee

Estimates of Recycling on the Worksite

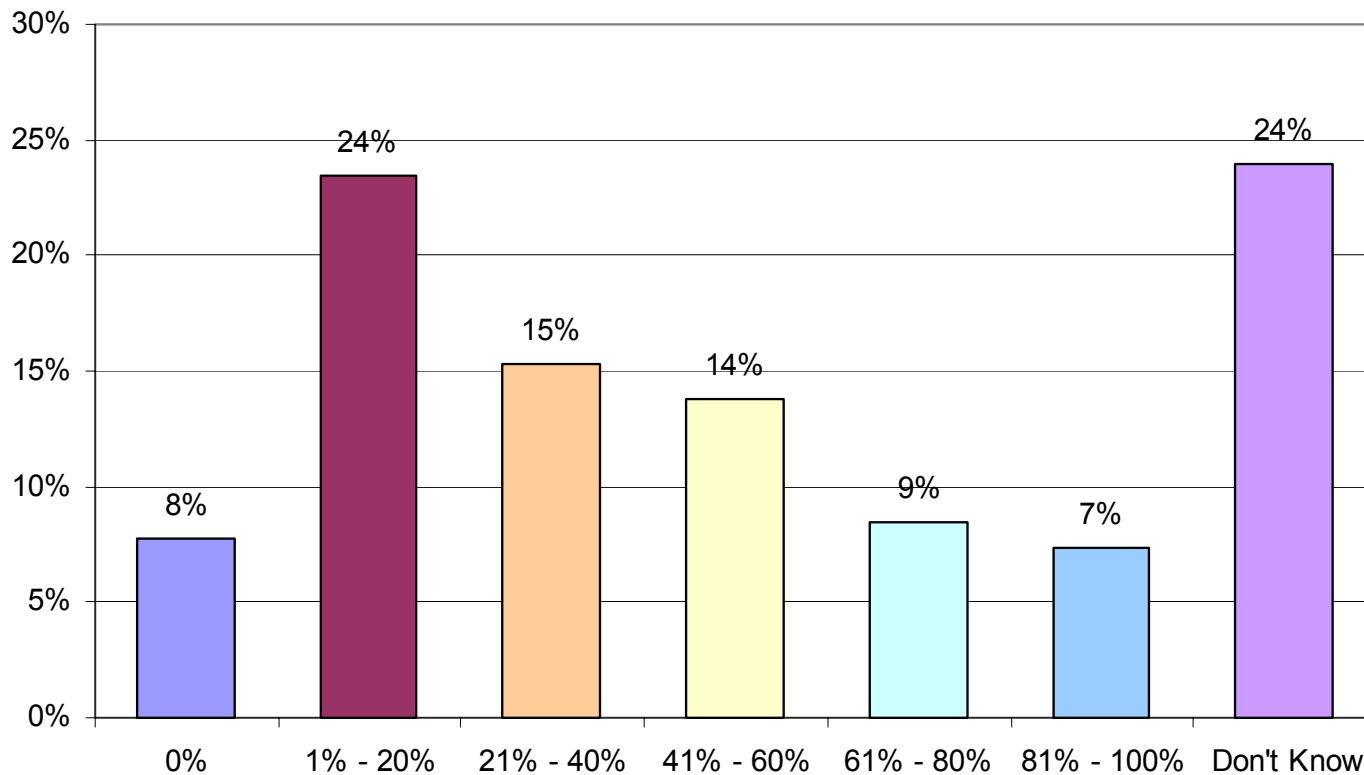
Most builders (47%) estimate the percentage of materials on their worksite that are recycled to be well under half of all materials used.

- ❖ Only 16% of all builders estimate the percentage of materials on their worksite that are recycled to be between 61 and 100%.
- ❖ 24% say they “don’t know” how much of the materials on their worksite are recycled.
- ❖ 8% of builders say that “None” of the materials on their worksite are recycled.

What Percentage of Building Materials Do You Think Are Recycled?

“Of the building materials you consume on your worksite, about what percentage would you say are recycled?”

n=400



Builder Recycling Programs

Among builders who do have recycling programs, the most frequent (49%) program description focused on recycling a single item (paper, metal, lumber, cans, plastic or oil)

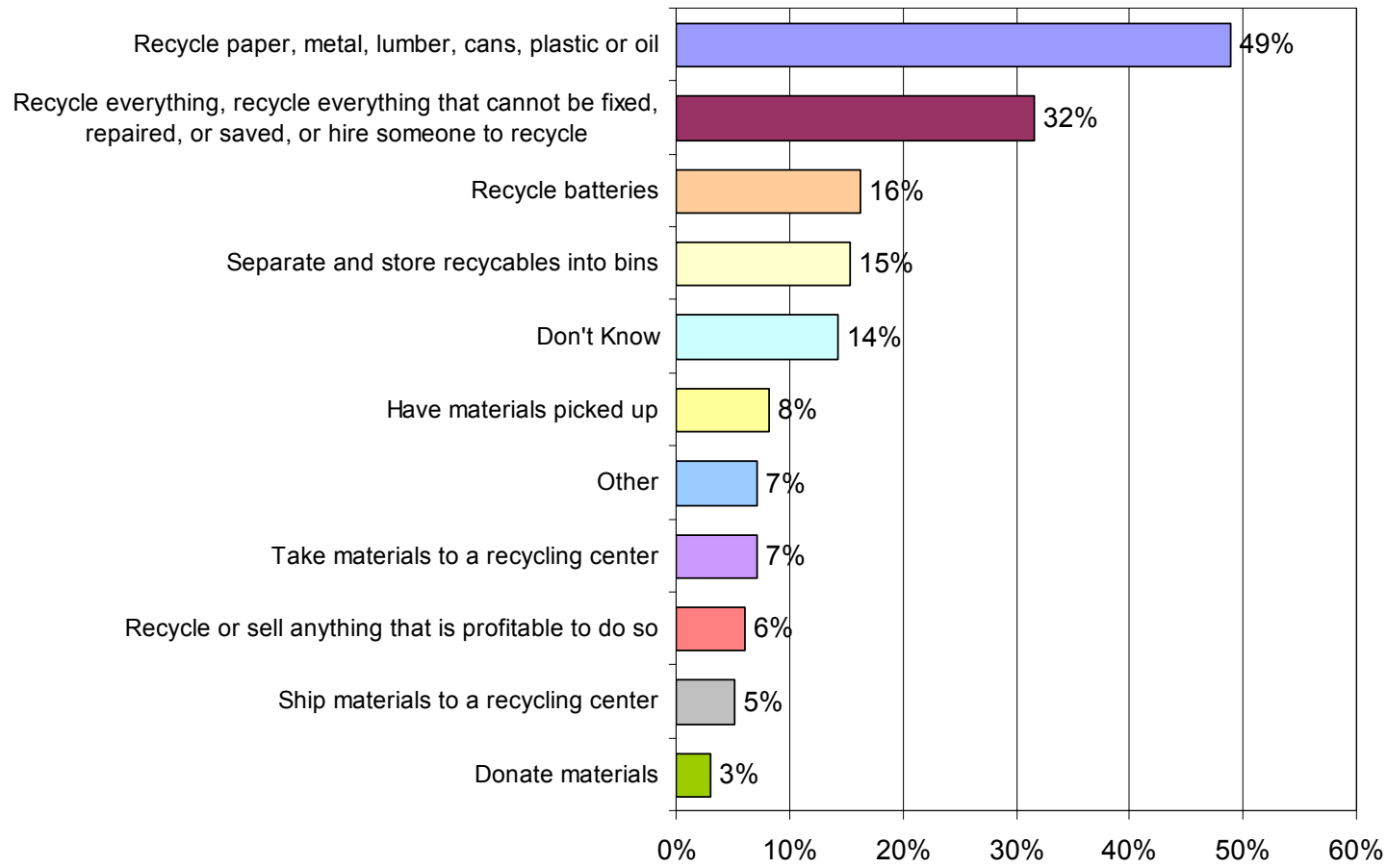
- ❖ 16% of builders who have recycling programs recycle batteries
- ❖ 32% of builders with recycling programs recycle “everything” or “everything that cannot be fixed, repaired, saved or given to someone else”
- ❖ 15% separate and store recyclables in bins

Most builders with recycling programs are satisfied with their program.

- ❖ 64% rate their program a 6 or a 7 on a 7-point scale where 7 is “Extremely Successful.”

Describe Your Company's Recycling Program

n=98



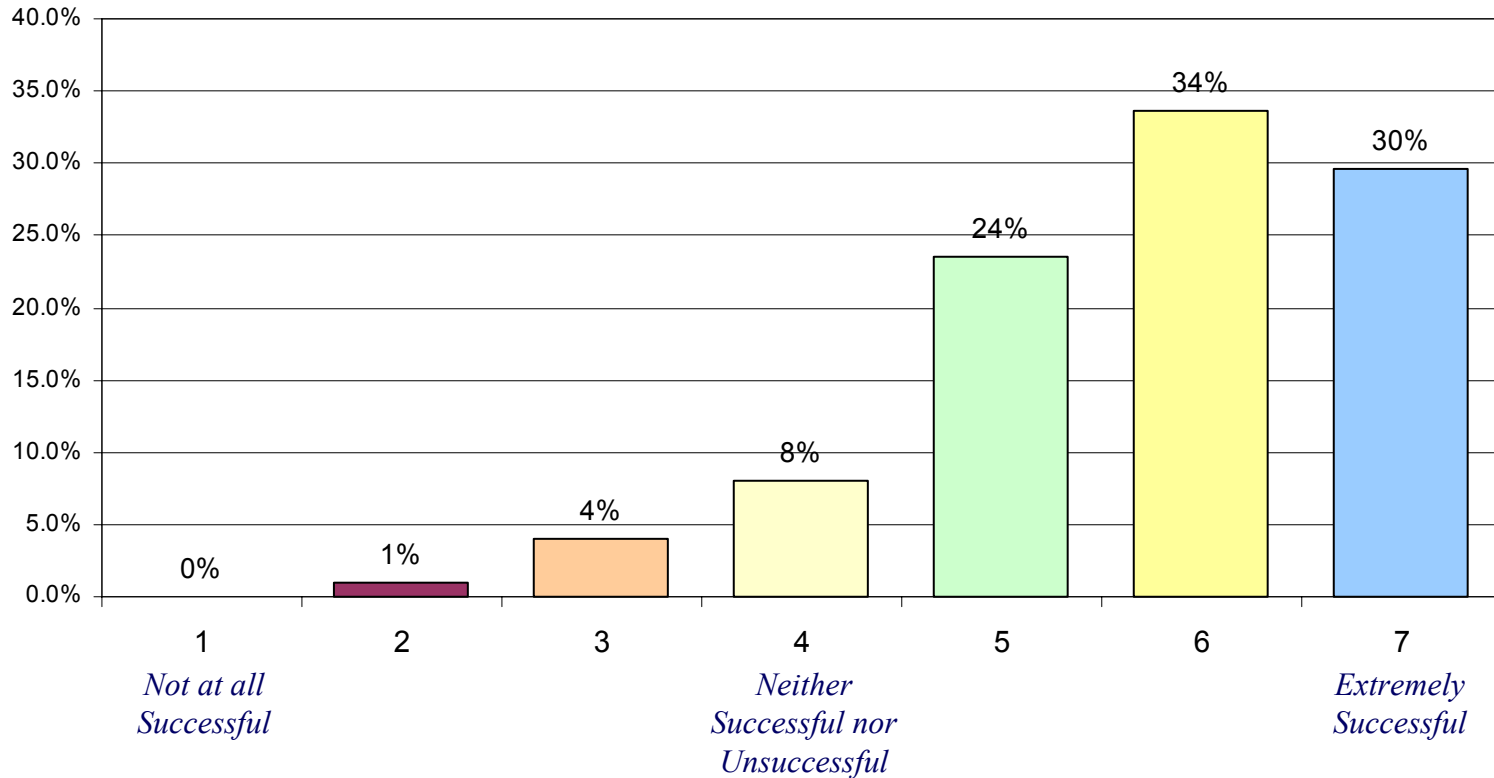
Base = Business Owner/General Contractor with employees or Business Owner/General Contractor, sole proprietor, or Business Employee answering "yes" to "Does your company currently have a recycling policy/program?"



Success of Recycling Program

“How would you rate the success of your current recycling program?”

n=98



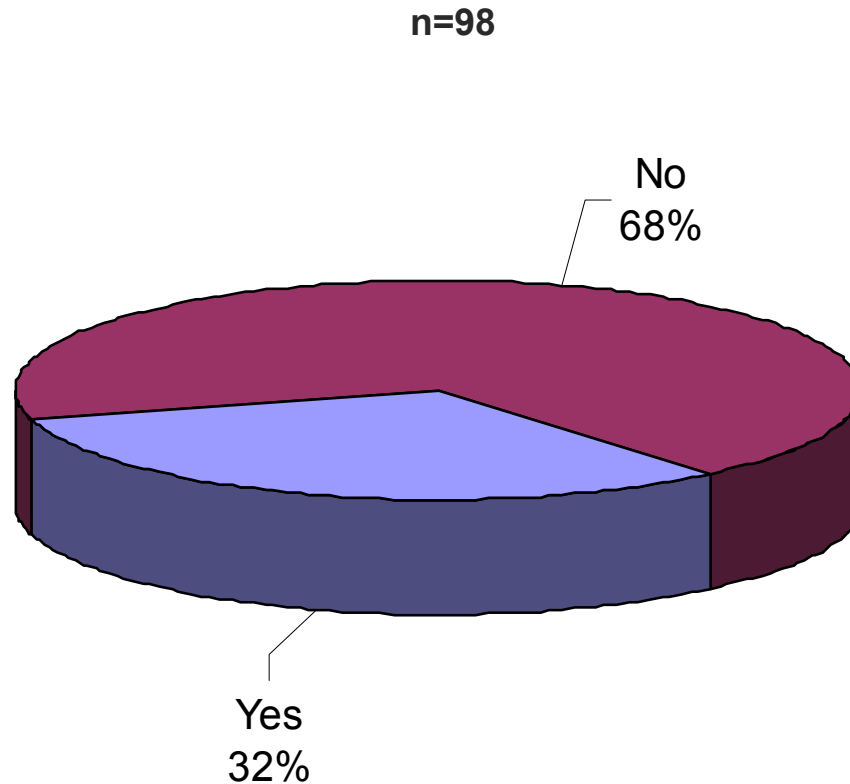
Employees and Recycling

Most builders (68%) with recycling programs do not offer employees an incentive for recycling materials on the job site.

Builders who do not have a recycling program believe employees would be likely to recycle if a program were in place.

- ❖ 35% of builders without a recycling program gave a 6 or a 7 on a 7-point scale (where 7 is “Extremely Likely”) to the likelihood that employees would recycle if they offered a program.
- ❖ 59% of builders without a recycling program gave a 3,4 or 5 on a 7-point scale (where 4 is “Neither Likely Nor Unlikely”) to the likelihood that employees would recycle if they offered a program.
- ❖ Only 7% of builders without a recycling program gave a 1 or a 2 (on a 7-point scale where 1 is “Extremely Unlikely”) to the likelihood that employees would recycle if they offered a program.

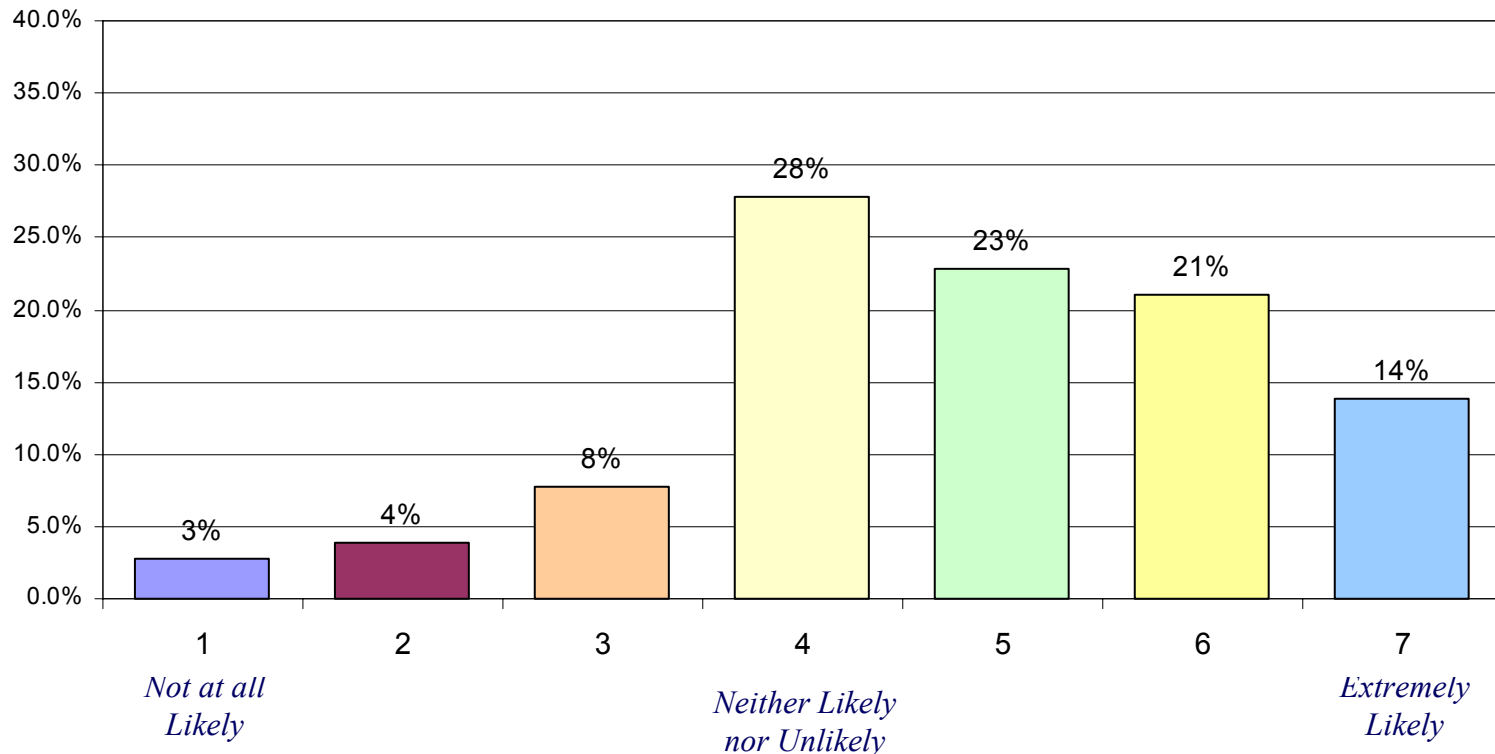
Are Employees Offered Incentives for Recycling?



Base = Business Owner/General Contractor with employees or Business Owner/General Contractor, sole proprietor, or Business Employee answering "yes" to "Does your company currently have a recycling policy/program?"

How Likely Are Employees to Recycle if Recycling Program was in Place?

n=180



Hoarding Behavior



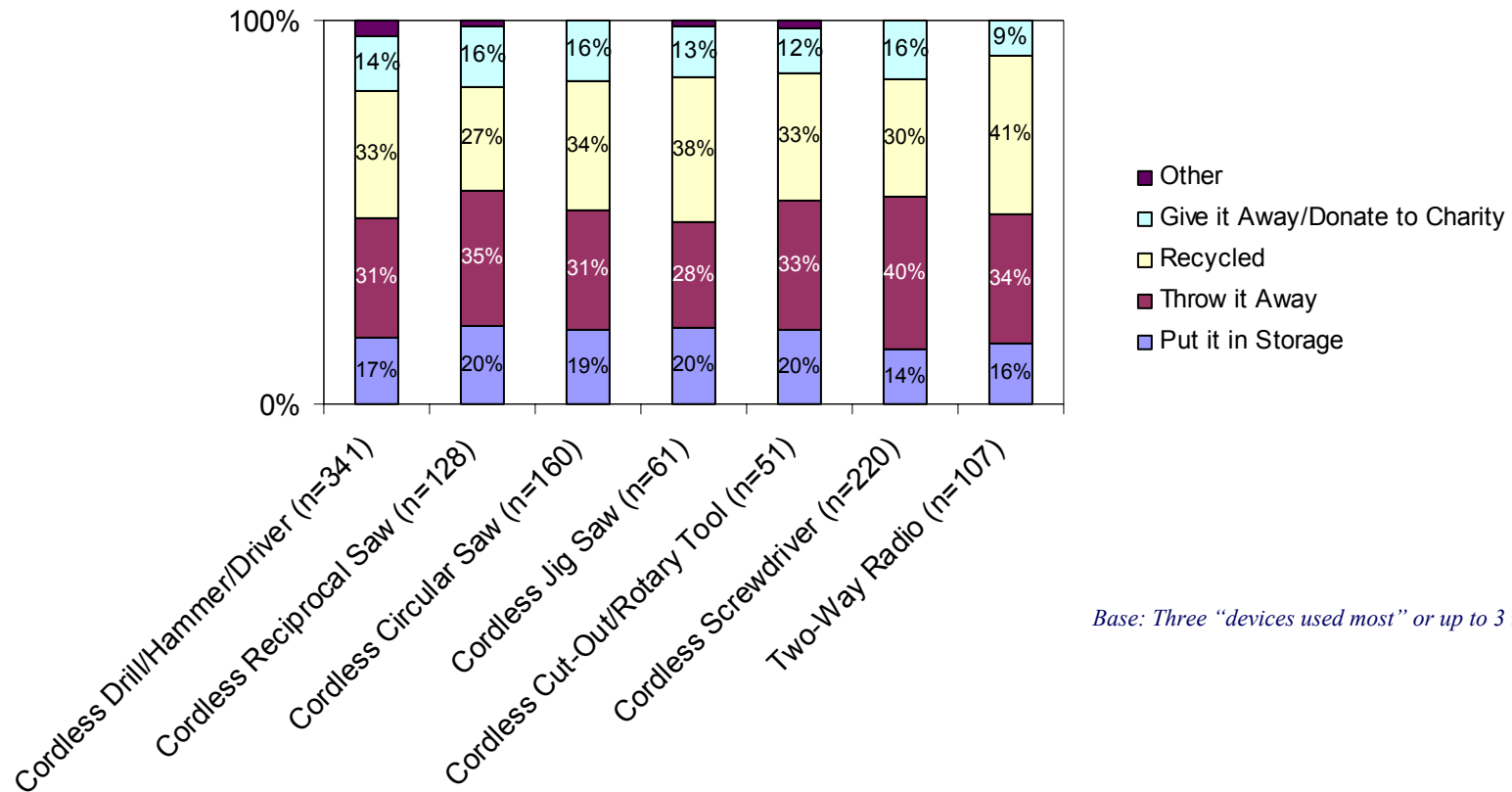
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Disposing of Devices No Longer Usable

“What do you typically do with devices when they are no longer usable in your business?”

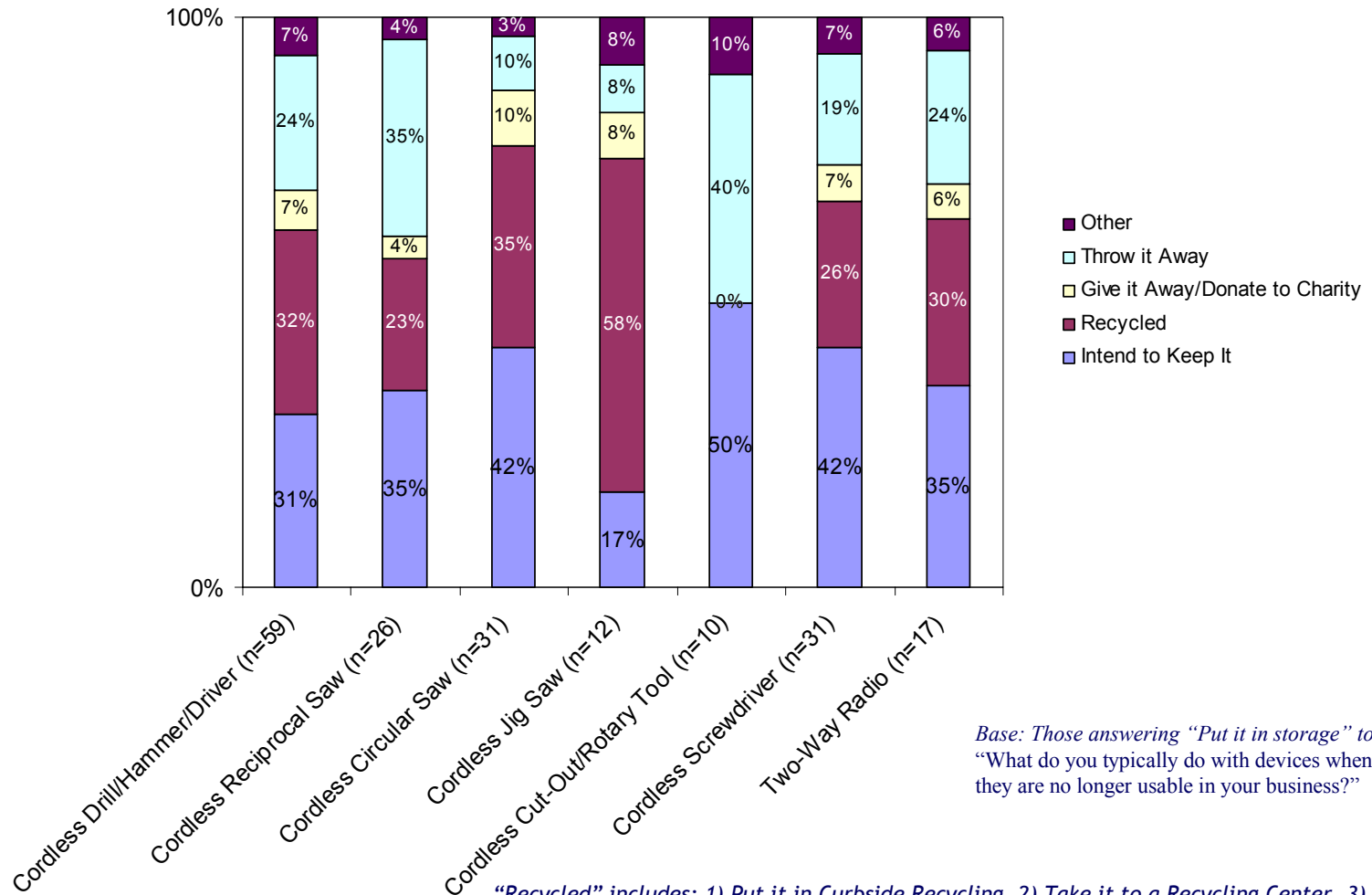


Base: Three “devices used most” or up to 3 used

“Recycled” includes: 1) Put it in Curbside Recycling, 2) Take it to a Recycling Center, 3) Put it in Retail Store Dropoff Box, 4) Leave it with a Retail Store Employee, and 5) Send it to Manufacturer

Intentions of Disposing of Stored Devices

“For the following device you put in storage, how do you intend to eventually dispose of it, if at all?”



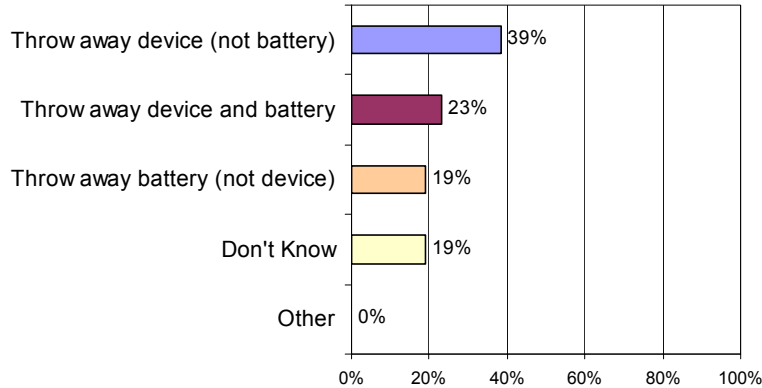
Base: Those answering “Put it in storage” to “What do you typically do with devices when they are no longer usable in your business?”

“Recycled” includes: 1) Put it in Curbside Recycling, 2) Take it to a Recycling Center, 3) Put it in Retail Store Dropoff Box, 4) Leave it with a Retail Store Employee, and 5) Send it to Manufacturer

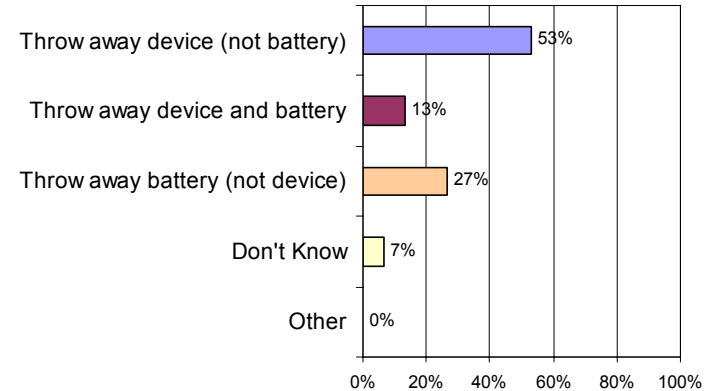
Did You Throw Away Battery and/or Device?

"For the following device you threw away or intend to throw away, which of the following best describes the situation?"

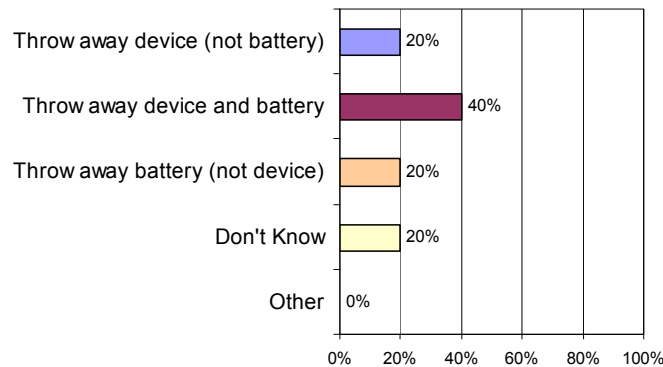
Cordless Drill/Hammer/Driver



Cordless Reciprocal Saw



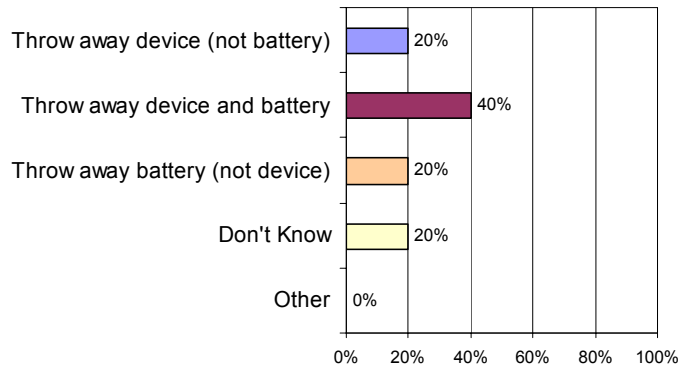
Cordless Circular Saw



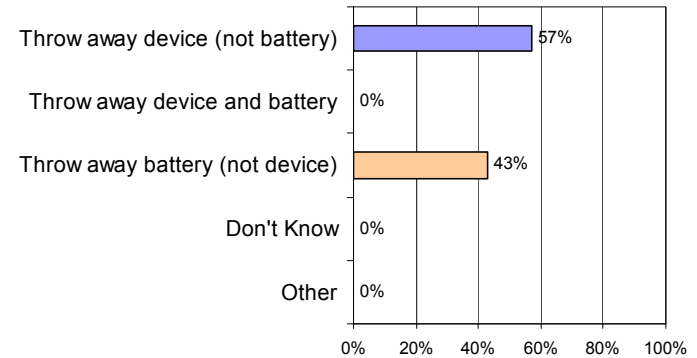
Did You Throw Away Battery and/or Device?

"For the following device you threw away or intend to throw away, which of the following best describes the situation?"

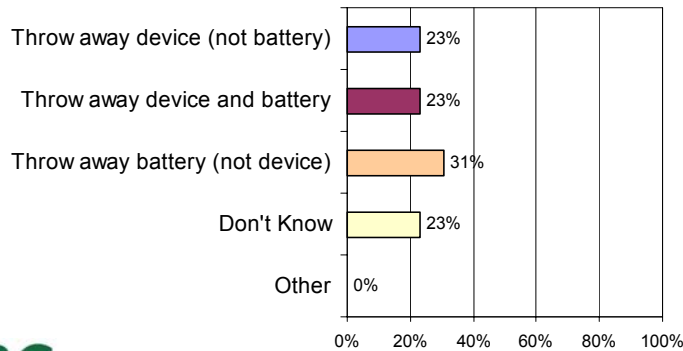
Cordless Jig Saw



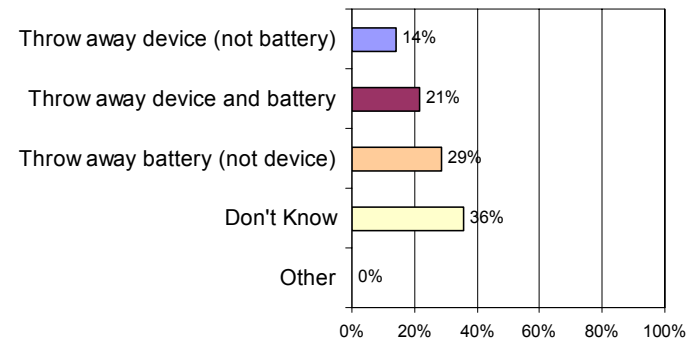
Cordless Cut-Out/Rotary Tool



Cordless Screwdriver

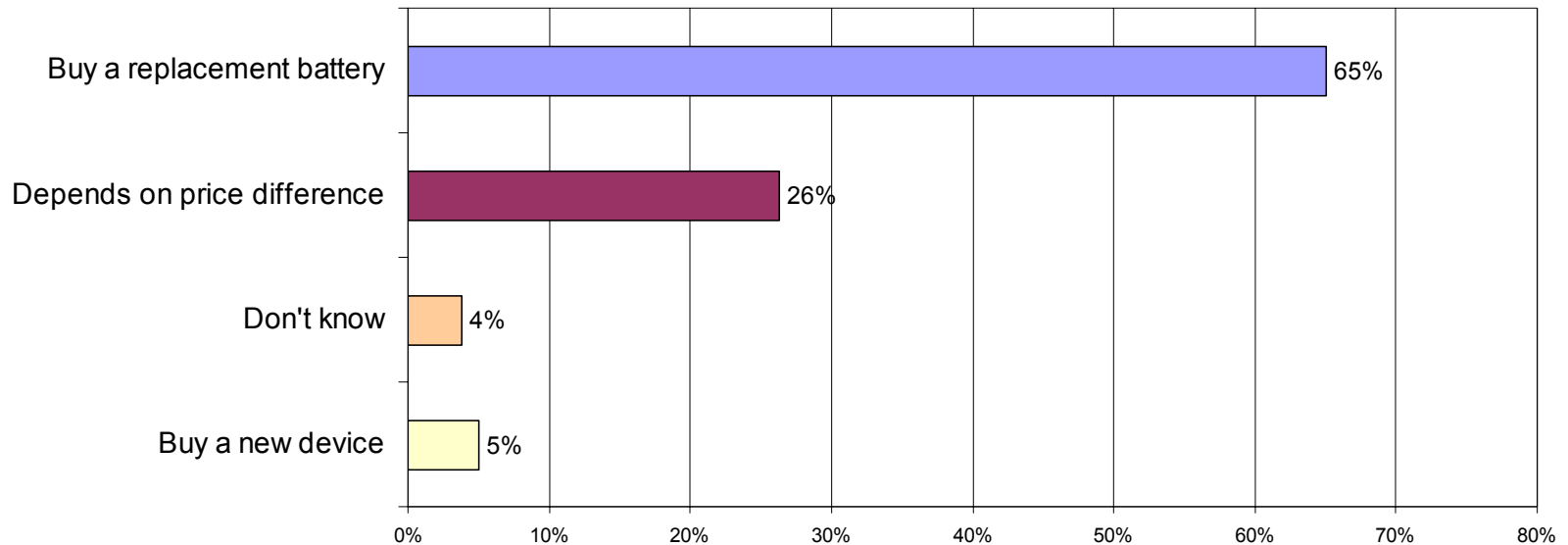


Two-Way Radio



Note: base sizes less than 10% of sample

When Battery Can No Longer Be Recharged...



Attitudes & Awareness of Recycling



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Attitudes and Awareness of Recycling

Builder's awareness and participation in recycling programs is comparable to consumers. Builders have a slightly higher tendency to participate in Deposit/Refund/Buyback programs (where available) and consumers have a slightly higher tendency to participate in Curbside Recycling.

- ❖ Curbside Recycling and Recycling Center had the highest awareness among builders (70% and 64%, respectively).
- ❖ Among those with programs available, Workplace Recycling had the highest participation rate (94%).

Recycling Batteries

Builders were most likely to recycle batteries that will no longer hold a charge if they got a dollar-off coupon or if there was a Deposit/Refund/Buyback program available.

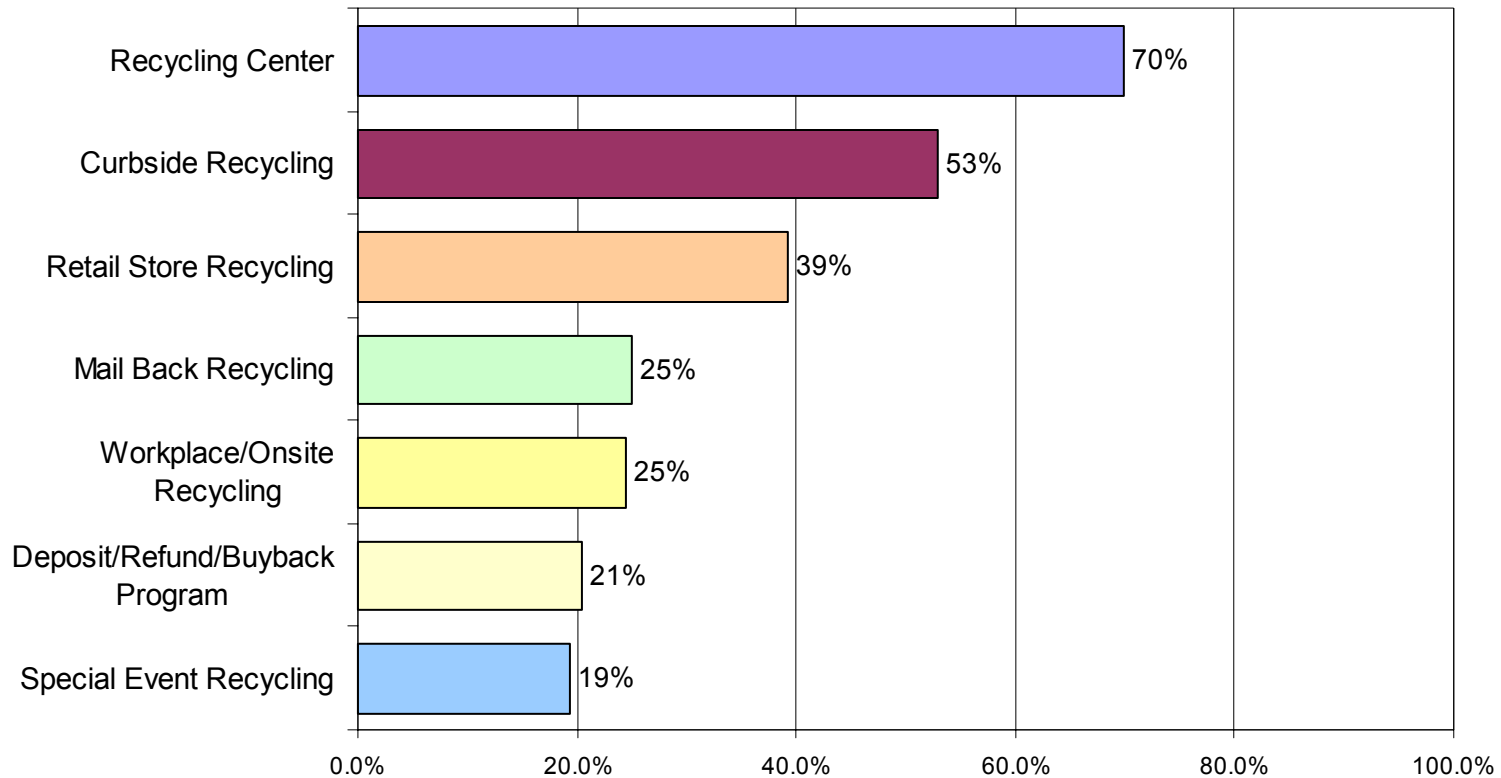
- ❖ Consumers were much less likely to say they would recycle at their workplace than builders (4.7 for consumers vs. 5.4 for builders on a 7-point scale).

Builder suggestions as to other incentives that might increase their recycling were also very similar to consumers.

- ❖ 65% of builders said “Don’t Know” or “None.”
- ❖ Other responses included: money/cash back, ease/convenience/curbside, coupons/discounts/rebates and more knowledge/information.

Recycling Program Awareness

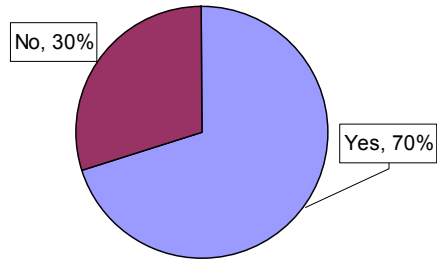
“Which of the following recycling programs are you aware of?”



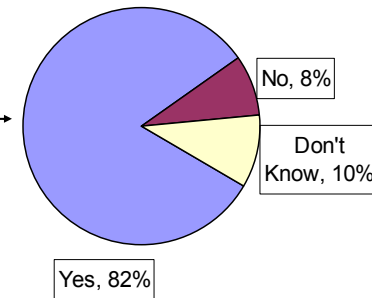
Base = 400

Recycling Programs- Recycling Center

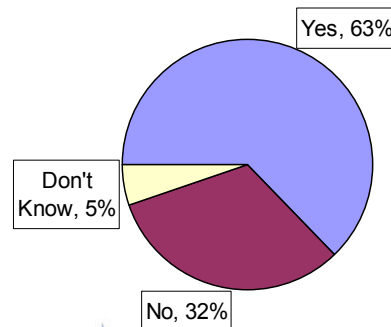
Aware of Recycling Center Recycling?



Is Program Offered in Your Area?

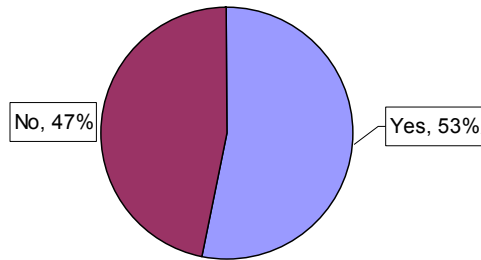


Are You Currently Participating in Program?

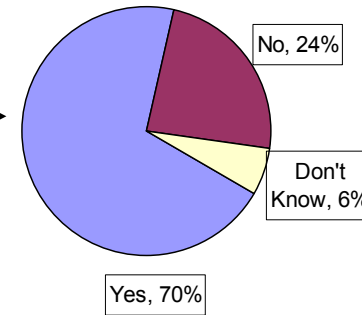


Recycling Programs- Curbside

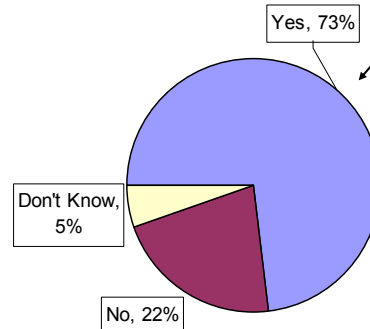
Aware of Curbside Recycling?



Is Program Offered in Your Area?



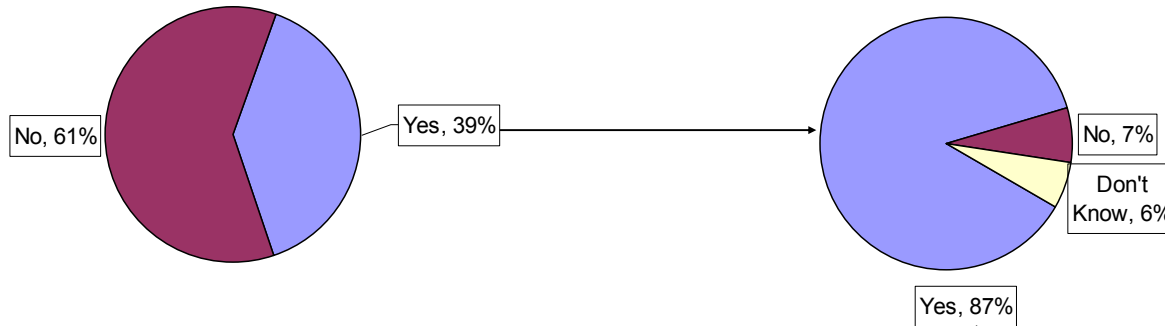
Are You Currently Participating in Program?



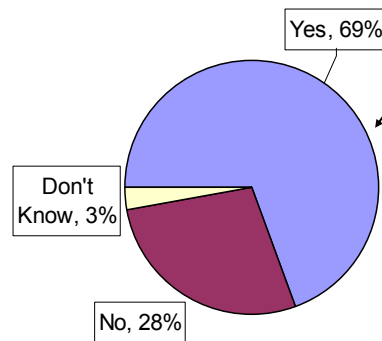
Recycling Programs- Retail Store

Aware of Retail Store Recycling?

Is Program Offered in Your Area?

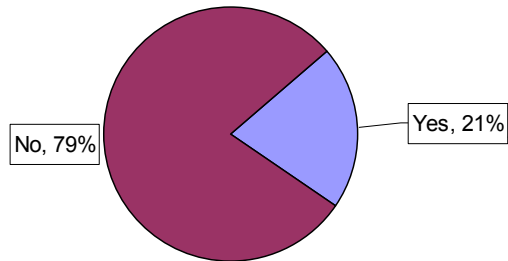


Are You Currently Participating in Program?

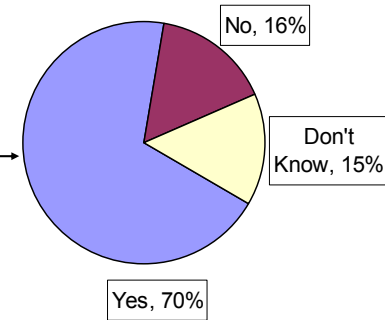


Recycling Programs- Deposit/Refund/Buyback

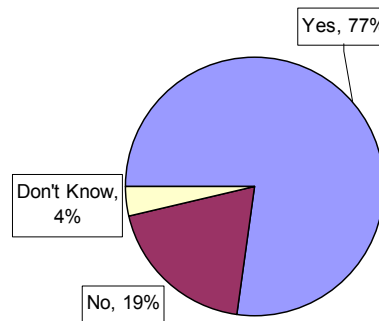
Aware of Deposit/Refund/Buyback Recycling?



Is Program Offered in Your Area?

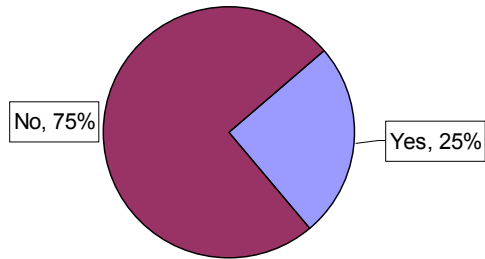


Are You Currently Participating in Program?

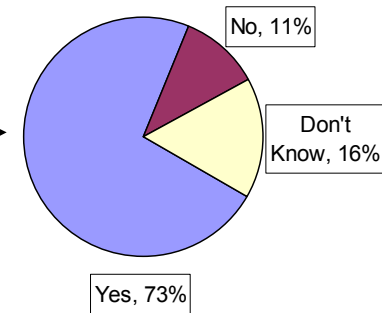


Recycling Programs- Mail Back

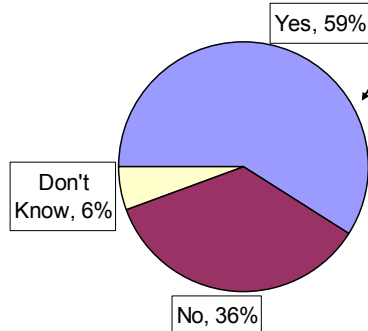
Aware of Mail Back Recycling?



Is Program Offered in Your Area?

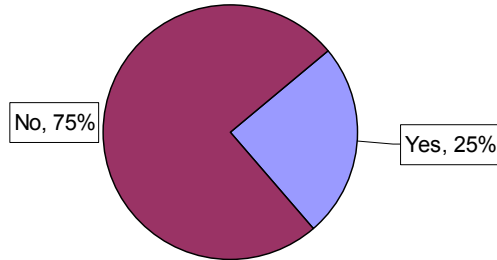


Are You Currently Participating in Program?

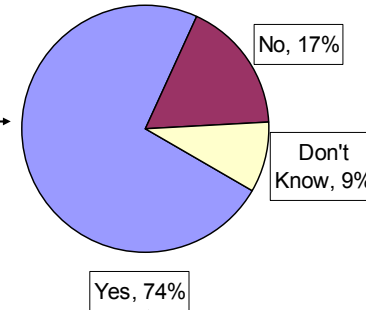


Recycling Programs- Workplace

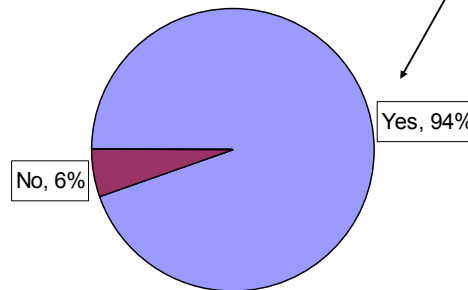
Aware of Workplace/Onsite Recycling?



Is Program Offered in Your Area?

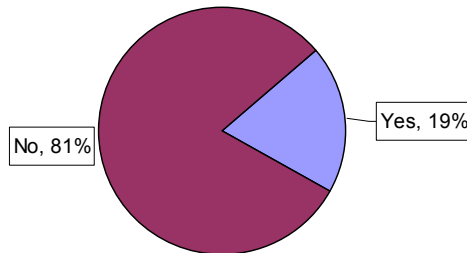


Are You Currently Participating in Program?

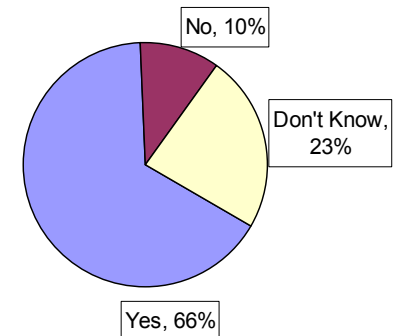


Recycling Programs- Special Event

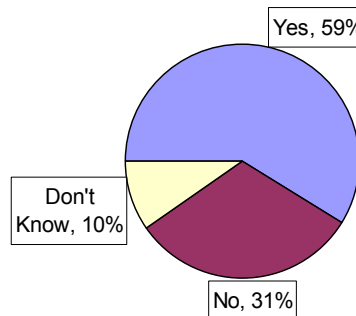
Aware of Special Event Recycling?



Is Program Offered in Your Area?



Are You Currently Participating in Program?



Items Think Can Be Recycled at Various Locations

“Which of these recycling programs do you think can be used to dispose of or recycle each of the items?”

- ❖ The top two locations chosen for rechargeable battery recycling were: recycling centers (47%) and retail stores (39%).
- ❖ Awareness of the recyclability of newspapers, aluminum cans and glass using curbside recycling was highest.
- ❖ Awareness was high for using recycling centers for all items except cell phones.
- ❖ Awareness of retail store recycling was high for both rechargeable batteries and cell phones.
- ❖ Awareness of the recyclability of alkaline batteries at various locations was lowest.

Items Think Can Be Recycled at Various Locations

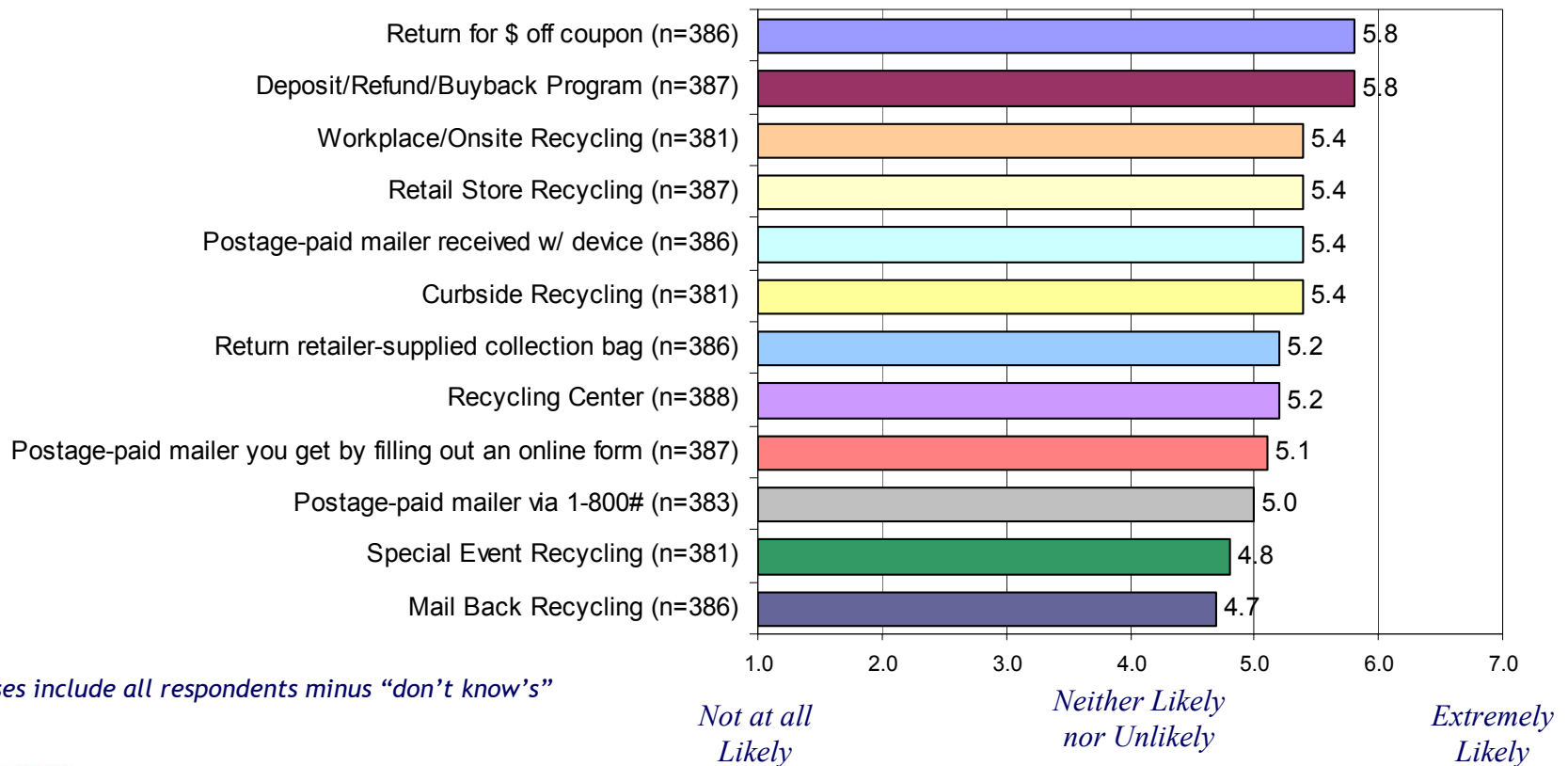
“Which of these recycling programs...can be used to dispose/recycle each of these items?”

	Curbside Recycling	Recycling Center	Special Event Recycling	Retail Store Recycling	Mail-Back Recycling	Workplace/ Onsite Recycling	Deposit/ Refund Buy-Back Program	Don't Know	None of These
Rechargeable Batteries	14.0%	46.5%	19.5%	39.3%	22.0%	15.8%	13.8%	15.8%	2.3%
Newspapers	67.5%	58.3%	15.0%	9.5%	2.8%	13.0%	3.8%	6.8%	2.0%
Glass	63.0%	56.0%	14.3%	8.3%	2.5%	11.5%	9.0%	7.0%	2.5%
Aluminum Cans	60.8%	61.8%	13.8%	10.8%	3.0%	12.3%	15.3%	5.8%	2.0%
Cell Phones	8.5%	31.8%	25.8%	40.0%	25.5%	10.0%	14.3%	18.0%	4.0%
Alkaline Batteries	12.3%	41.0%	18.5%	22.3%	13.3%	11.0%	7.3%	25.5%	7.0%

- Rechargeable Batteries are associated most with Recycling Centers & Retail Store Recycling (with 16% “Don’t Know”)
- Newspapers, Glass and Aluminum Cans are by far associated with Curbside Recycling and Recycling Centers
- Cell Phones are associated with Retail Store Recycling
- Alkaline Batteries are associated with Recycling Centers or “Don’t Know”

Likelihood to Recycle if Program is Available

(Thinking ONLY about rechargeable batteries that won't hold a charge anymore)



Note: Workplace mean score went from 4.7 on consumer to 5.4 on builder

Recycling Option Effectiveness Index

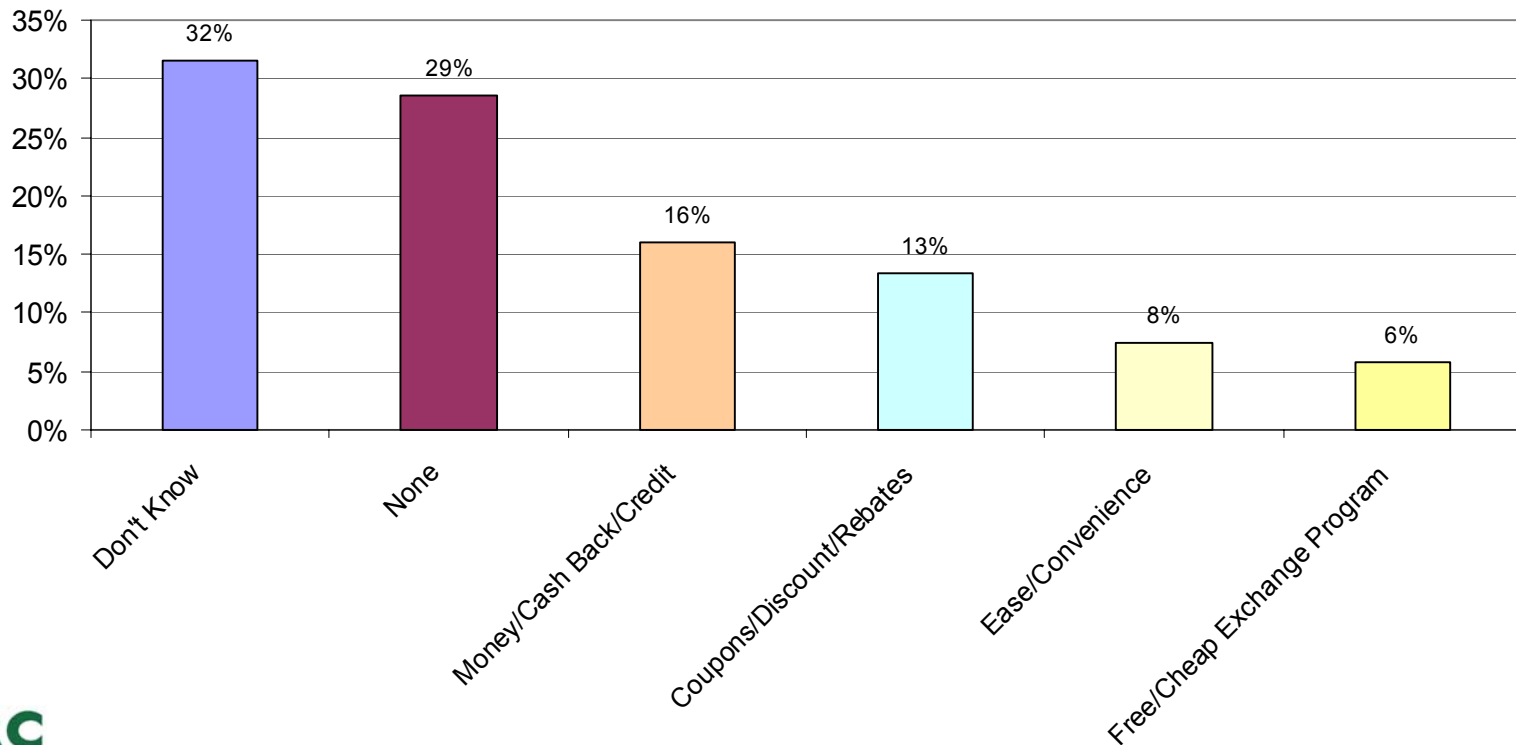
The Recycling Option Effectiveness Index illustrates the relationship between current program availability and actual use (Program Availability x Program Participation).

	Aware?	Available?	Participate?	Effectiveness Index
Workplace/Onsite Recycling	25%	74%	94%	0.69
Retail Store Recycling	39%	87%	69%	0.60
Deposit/Refund/Buyback Program	21%	70%	77%	0.54
Recycling Center	70%	82%	63%	0.52
Curbside Recycling	53%	70%	73%	0.51
Mail Back Recycling	25%	73%	59%	0.43
Special Event Recycling	19%	66%	59%	0.39

Recycling Incentives

“What other incentives would prompt you to recycle rechargeable batteries?”

- ❖ 61% of the audience said “Don’t know” or “None”
- ❖ Also noted were: Money/cash back/credit, coupons/discounts/rebates, ease/convenience and free/cheap exchange program.

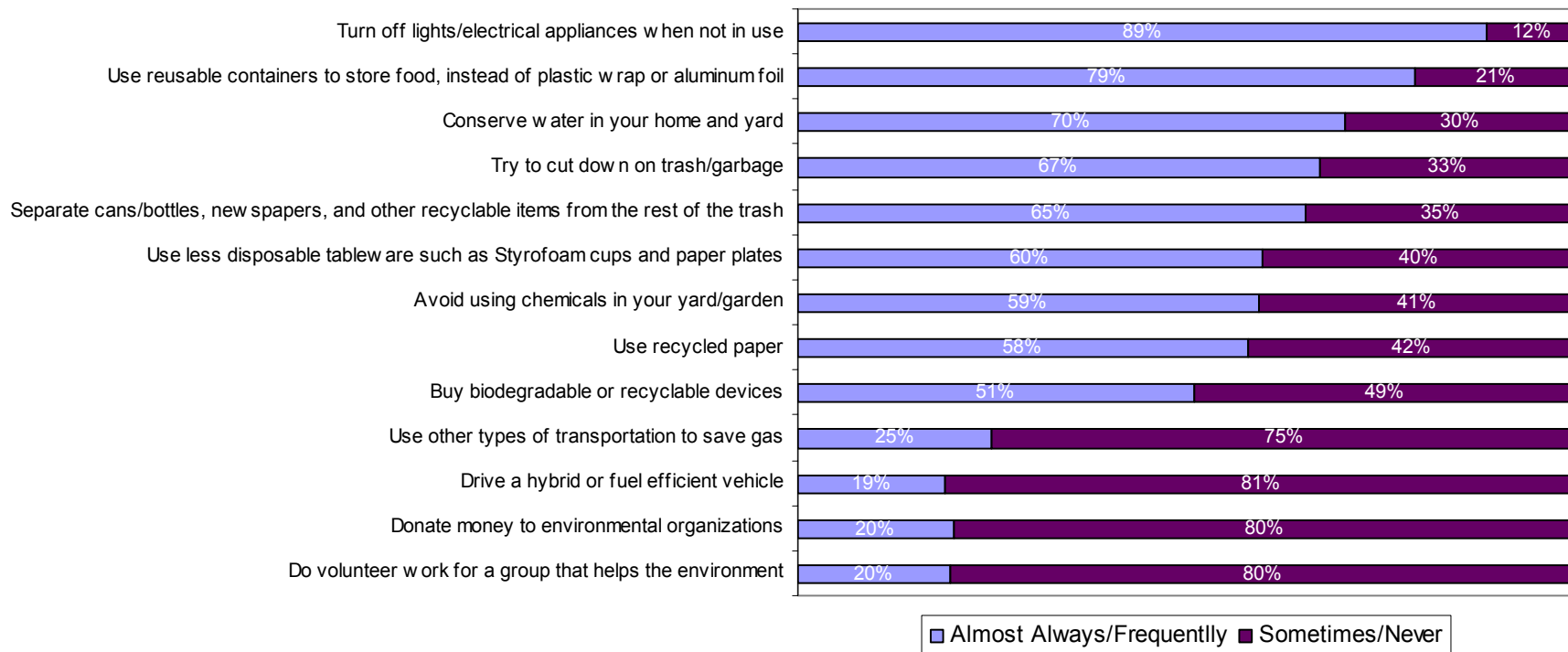


Day-to-Day Activity

Builders' day-to-day participation in recycling and other environment-friendly activities mirror consumers' participation levels.

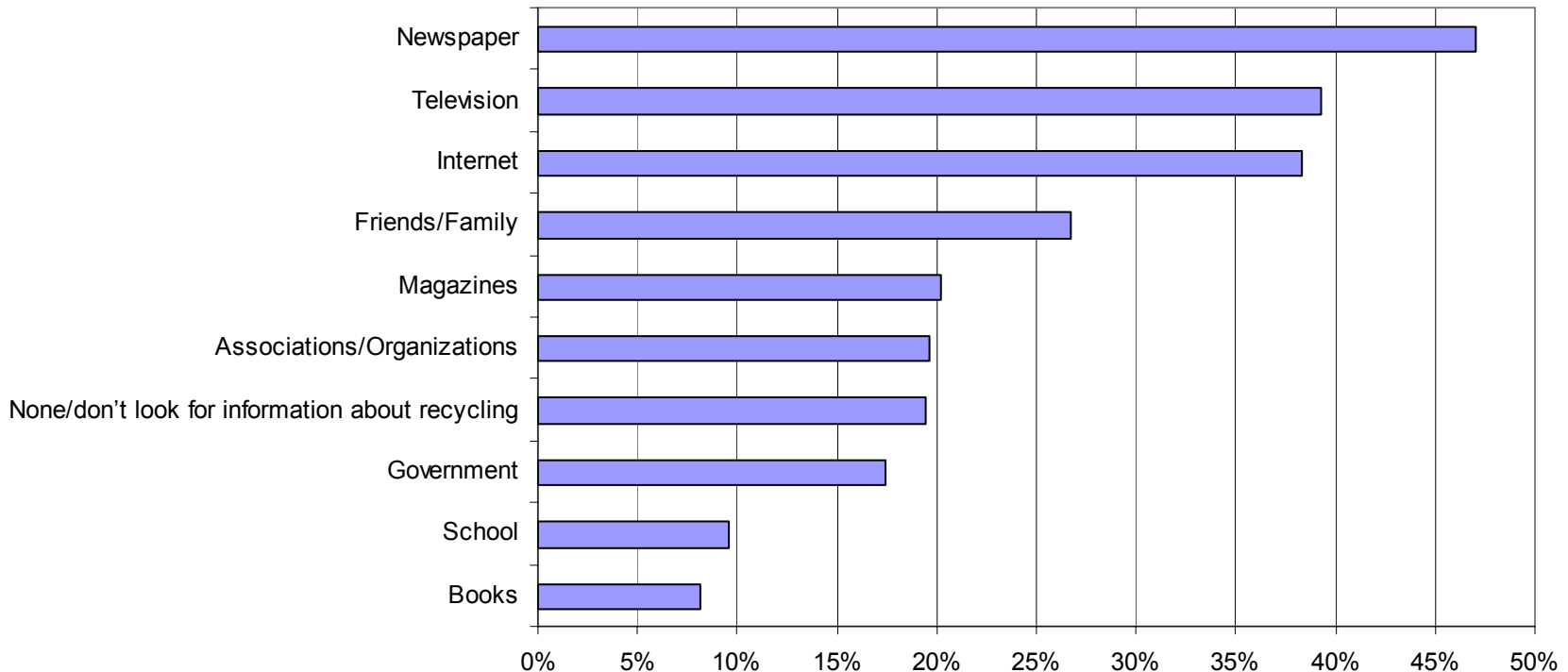
- ❖ Builders are more likely to participate in those activities that are easier and require less change to current behaviors, such as turning off lights (89% almost always do) and using reusable containers to store food (79%).
- ❖ Like consumers, builders are less likely to participate in behaviors that require more effort, investment or behavior change, such as using alternative transportation to save gas (25%), driving a hybrid or fuel-efficient car (1%), donating money (20%) and volunteering (20%).

Day-to-Day Activity



Information Resources for Recycling

Builders are most likely to use newspapers, television and the Internet for information about recycling. These information sources are the same ones used mostly by consumers.



Logo/ Collection Box Recognition



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RBRC 1-800 Seal



- ❖ The seal has been seen by 19% of the respondents, 65% have not seen it and 16% were not sure.
- ❖ Recognition among builders was higher than consumers (19% vs. 8%).
- ❖ For those who have seen the logo, it was most frequently seen on batteries, device packaging/user manuals and in-store displays.
- ❖ 63% stated they would be “Extremely,” “Very” or “Somewhat” Likely to use the toll-free number to get information on how to recycle rechargeable batteries.

Recycling Collection Boxes



- ❖ 20% of respondents reported having seen the recycling collection boxes, 72% have not seen them and 8% were not sure.
- ❖ Recognition among builders was higher (20% vs. 9%).
- ❖ For those who have seen the recycling collection boxes, they were most frequently seen in retail stores and recycling centers.
 - Also cited were: community centers and business/workplace.
 - Very few respondents cited fire/police station.
 - 7% had seen the boxes, but could not remember where they saw them.
- ❖ 74% of those that recognized the boxes used the box;
 - More builders have used the boxes (74% vs. 37%)
 - 52% of those had used them at retail stores.
 - Recycling centers and Business/workplace were cited at a lesser rate.
 - Community centers were cited with very little frequency.
 - No one had used the boxes at fire/police stations.

Recycling Collection Bins



- ❖ 18% reported having seen the recycling collection bins, 71% have not seen them, and 12% were not sure.
- ❖ Recognition among builders was higher (18% vs. 11%).
- ❖ For those who have seen the collection bins, they were most frequently seen at Home Depot, followed by Lowe's.
- ❖ Only 13% of respondents who saw the bins saw them at Circuit City.
- ❖ When those who recognized the bins were asked if they had used them to recycle rechargeable batteries, 57% (35% of consumers used) had and 59% of those had used them at retail stores.

Overall Recognition/Awareness



Recycling Collection Boxes

20%



1-800 Seal

19%



Recycling Collection Bins

18%

0%

10%

20%

30%

RBRC
RECHARGEABLE
BATTERY
RECYCLING
CORPORATION

 **POLARIS**
MARKETING RESEARCH

November 21, 2006
Slide #64

Lifestyles & Demographics



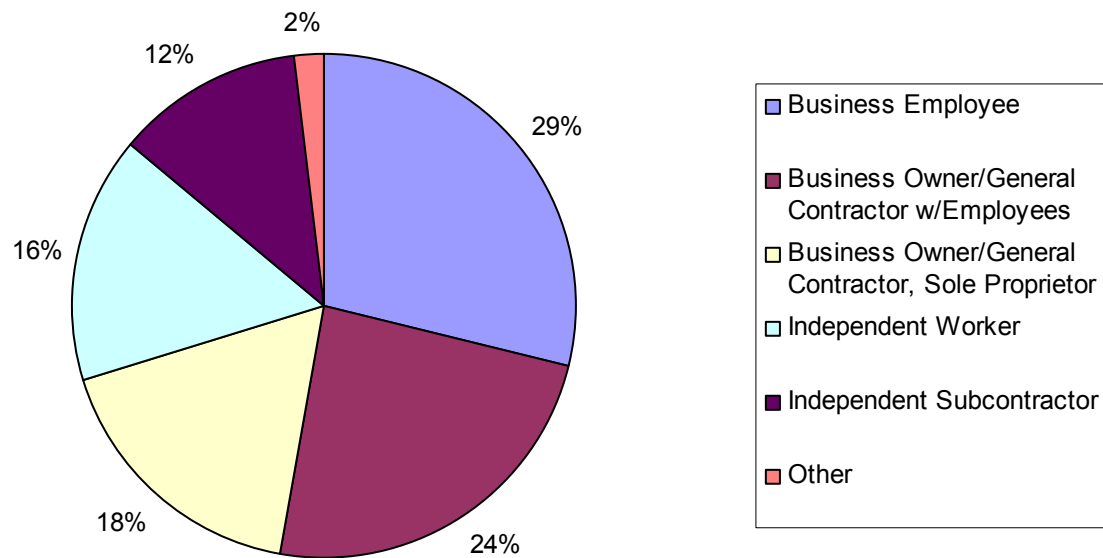
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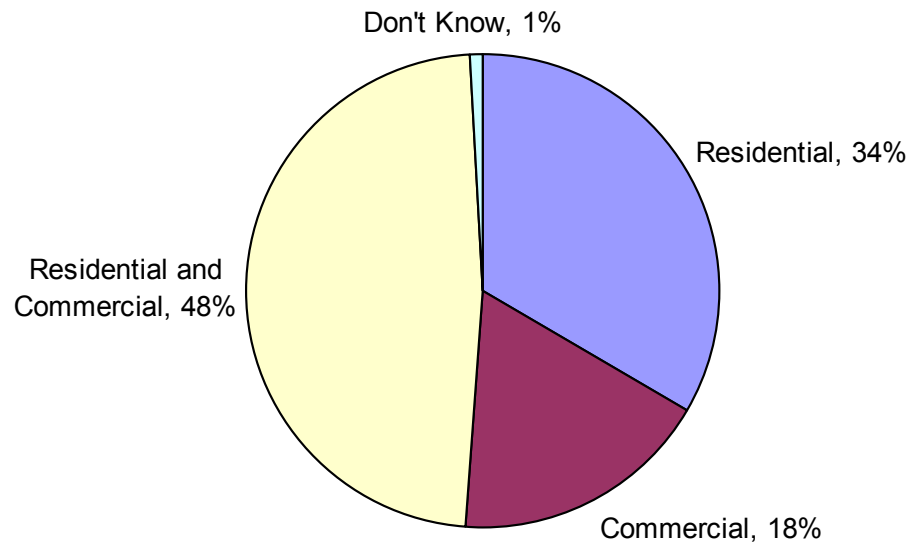
General Demographics

Position Description



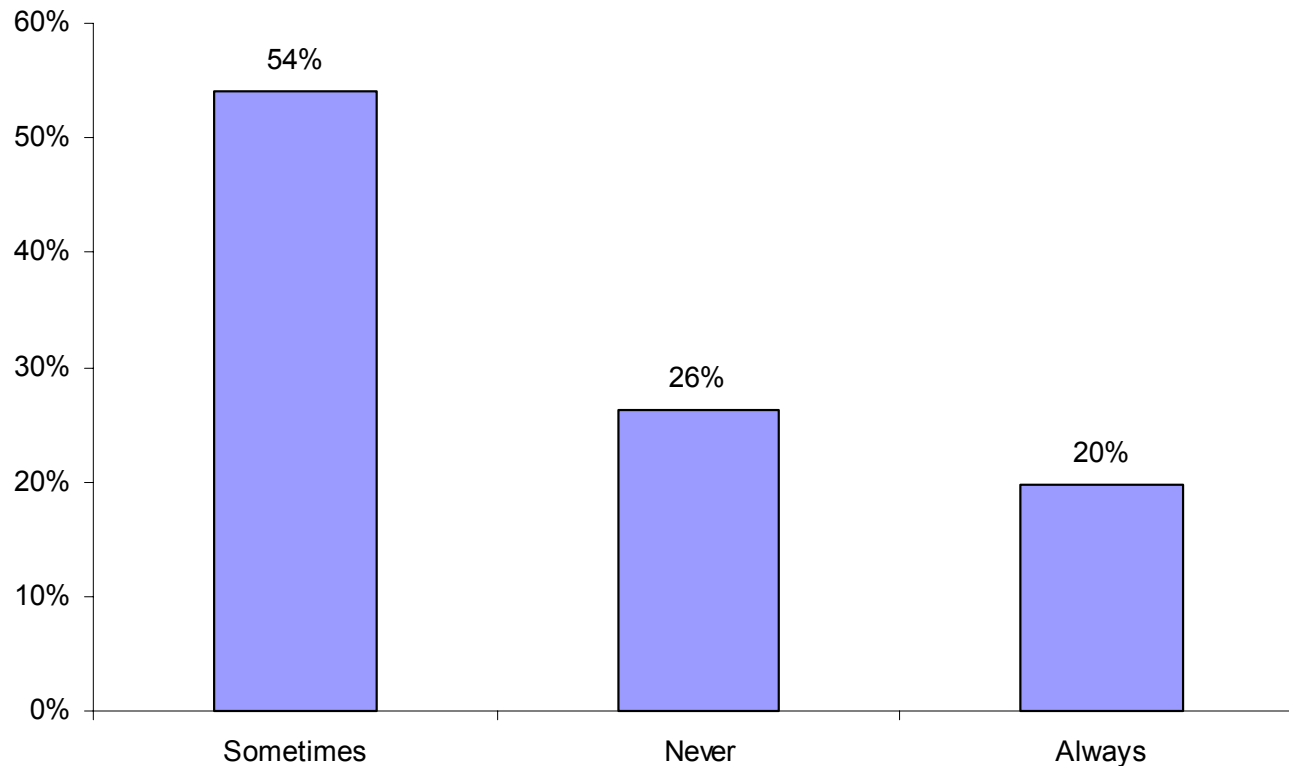
General Demographics

Projects Typically Worked On



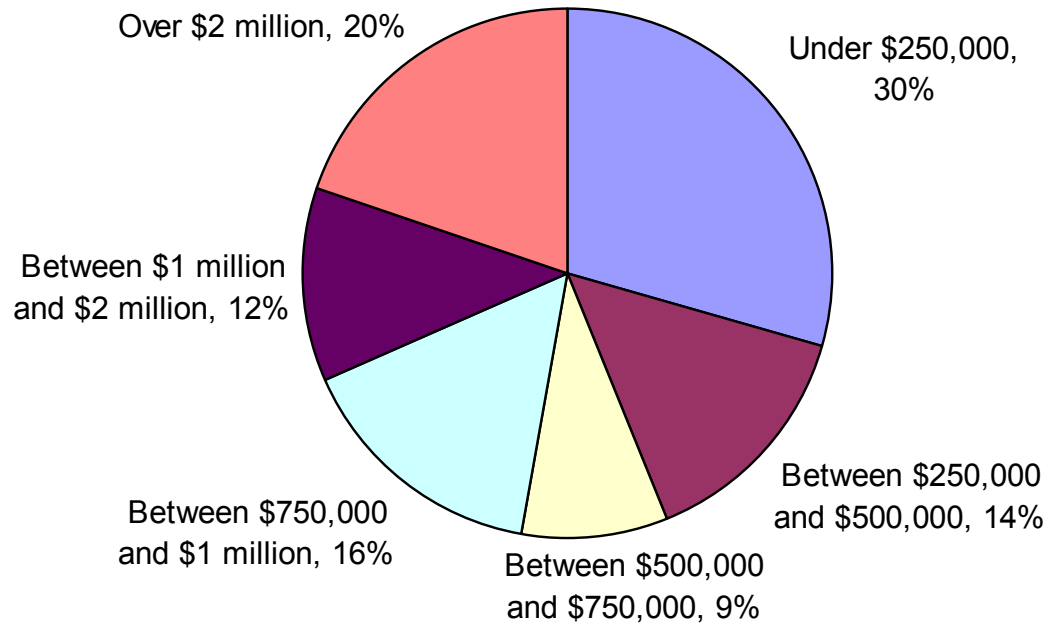
General Demographics

How Often is Recycling Required on Projects?



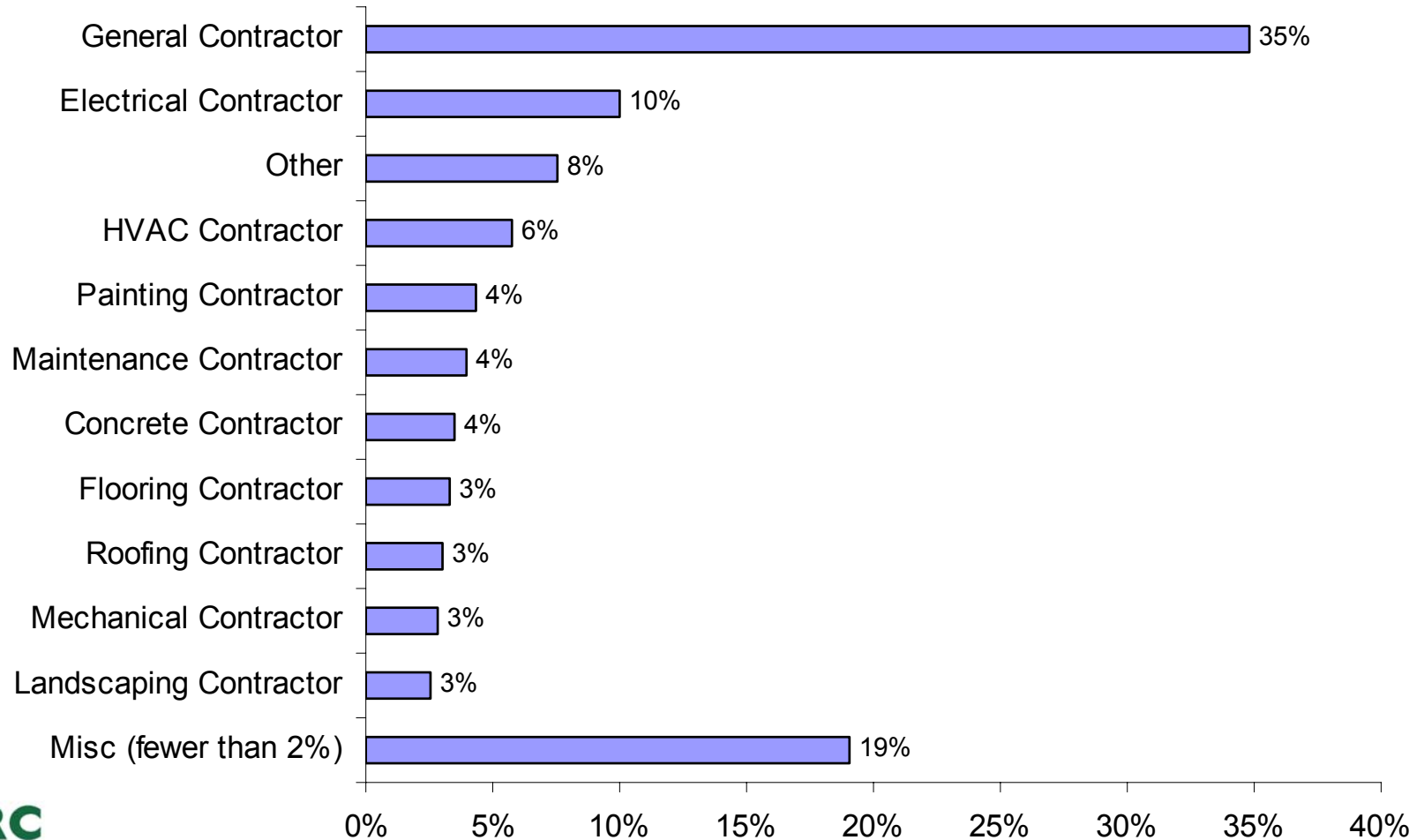
General Demographics

Total Gross Revenue for Last Fiscal Year



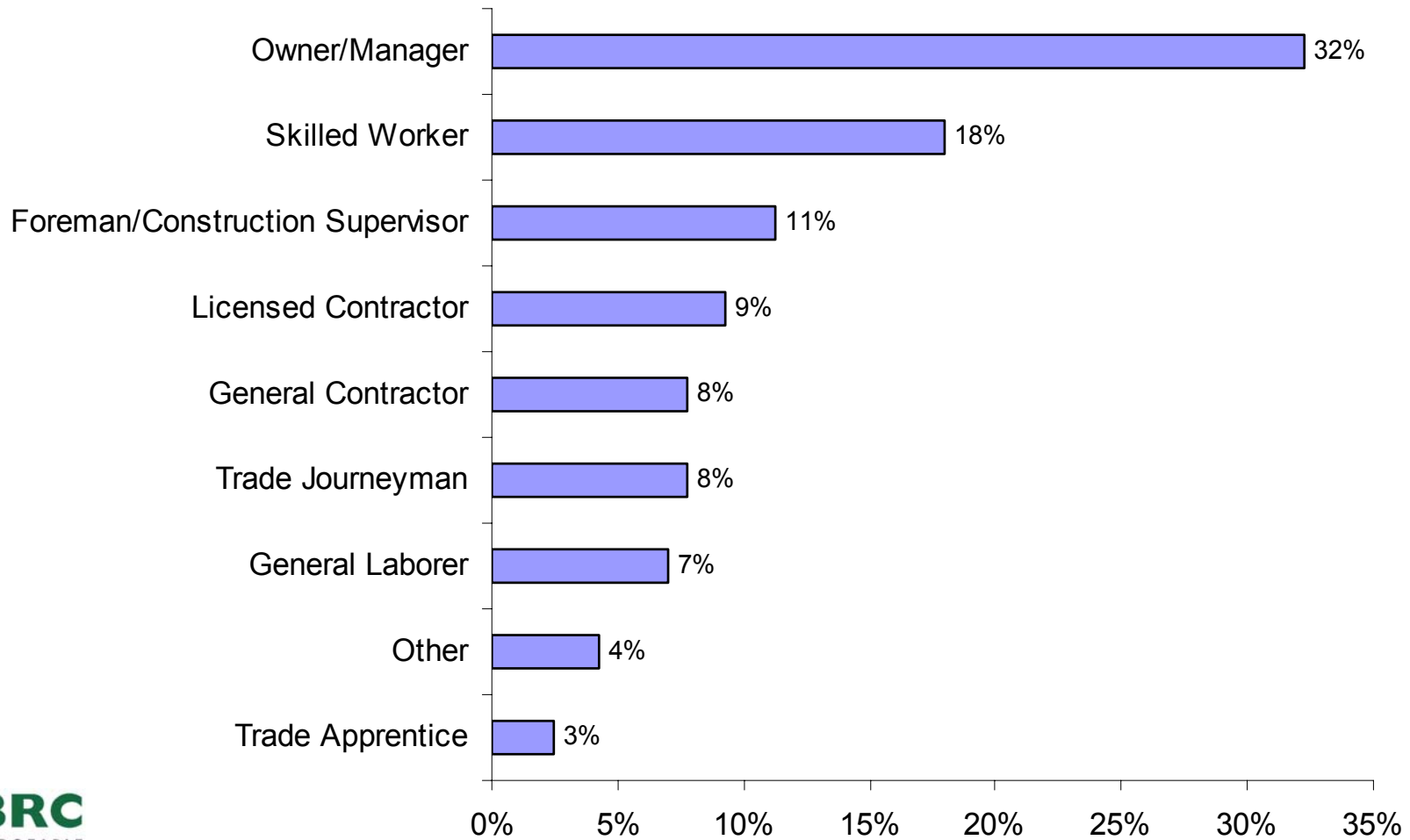
General Demographics

Company Trade



General Demographics

Position Within Trade



Magazine Readership

Builders were asked to name the three magazines they read most frequently. While “Don’t Know” was most frequently mentioned (39%) and 4% said “none,” several magazines received multiple mentions:

Time	7%
Sports Illustrated	5%
Handy Man	4%
Reader’s Digest	4%
People	4%
Newsweek	3%
Popular Science	3%
Playboy	3%

Magazine Readership by Type

The three types of magazines read most by builders are: Builder/Contractor, Sports & Outdoors and General Interest.

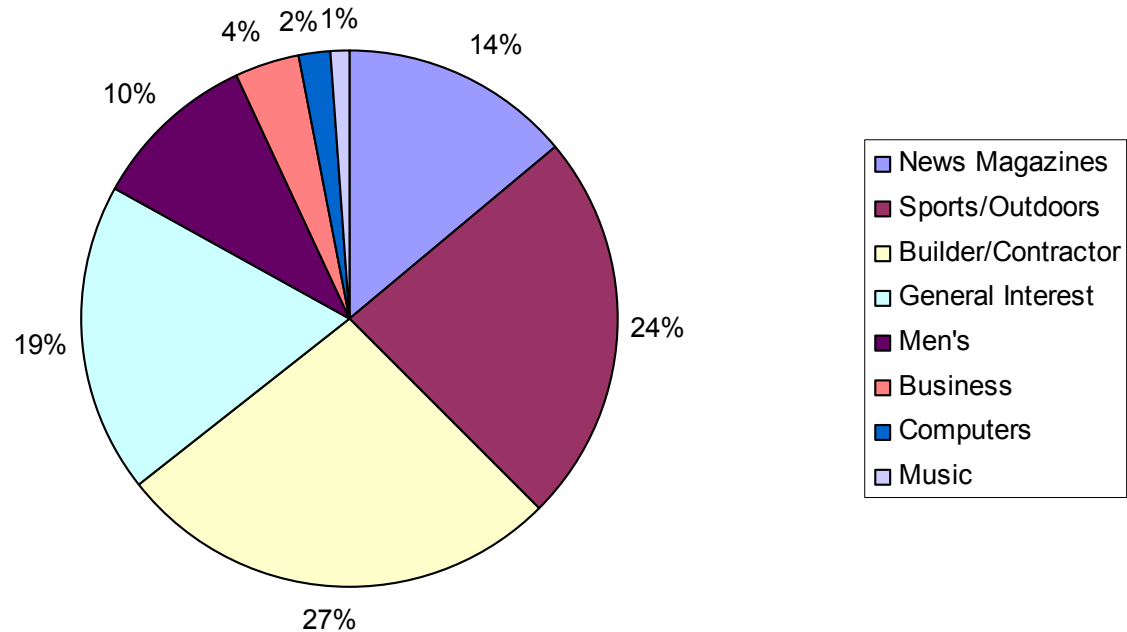
Magazines Broken Down by Type

Builder/Contractor	
Handy Man	15%
Popular Science	12%
This Old House	8%
Architectural Digest	6%
Engineering News Record (ENR)	5%
Miscellaneous (5 or fewer)	54%
Total	100%

Sports/Outdoors	
Sports Illustrated	22%
Field & Stream	10%
Outdoor Life	8%
National Geographic	7%
ESPN	6%
Miscellaneous (5 or fewer)	47%
Total	100%

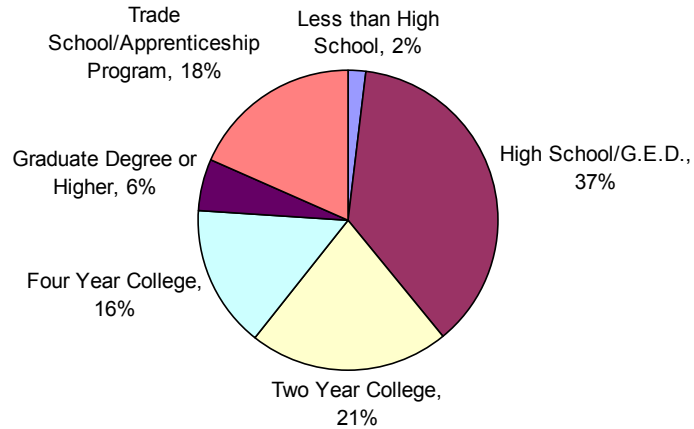
General Interest	
Reader's Digest	21%
People	20%
Better Homes and Gardens	11%
Consumer Reports	9%
Miscellaneous (5 or fewer)	39%
Total	100%

Magazine Readership by Type

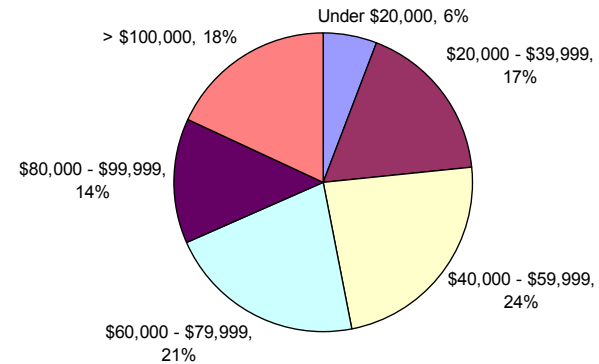


General Demographics

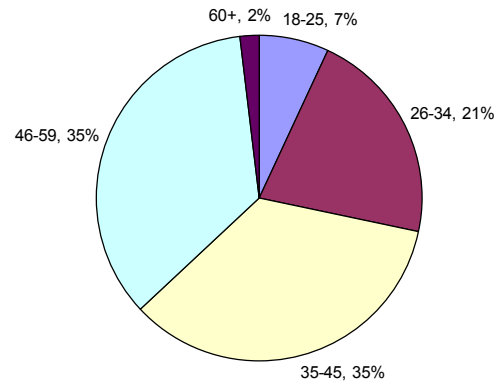
Education



Income



Age



Segmentation Analysis

BACKGROUND:

RBRC consulted with Polaris Marketing to apply segmentation analysis to our consumer awareness survey. Segmentation analysis partitions consumers into segments with similar recycling characteristics to improve dissemination of RBRC’s recycling message. Segmentation analysis enables RBRC to target different groups by adapting our message and marketing mix to best suit each targeted segment.

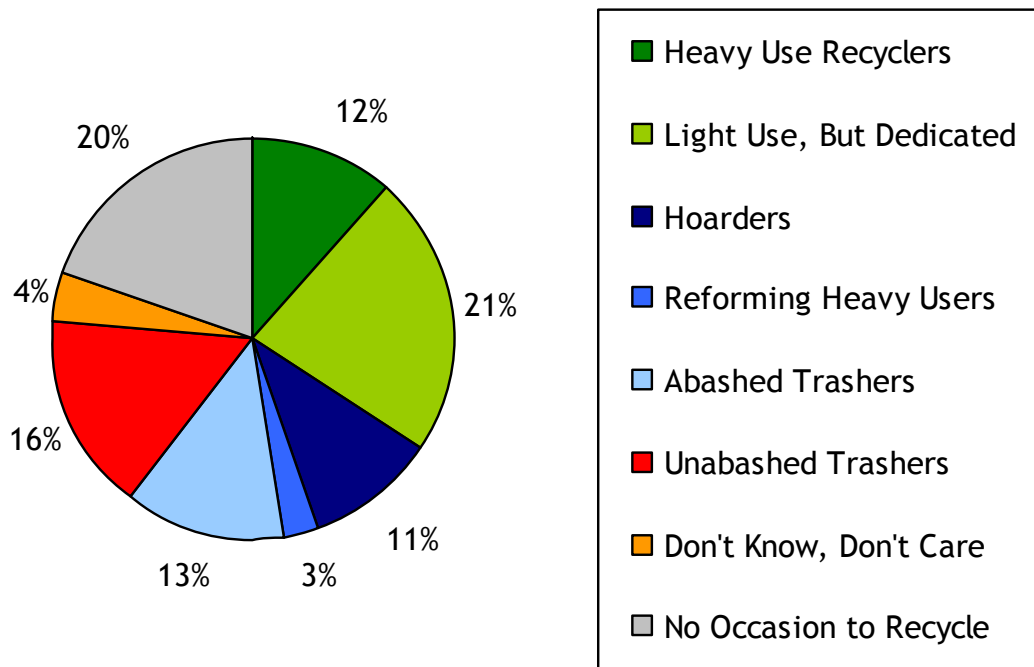
GOALS:

1. Identify distinct consumer behaviors based on recycling behaviors
2. Identify each segment members’ likelihood of performing certain recycling-related actions
3. Provide input for increasing key segment’s recycling behaviors

SEGMENTATION ANALYSIS:

Membership in each of the resulting segments was driven by recycling behavior, the number of devices owned, and the opportunity to increase their recycling habits. By classifying the respondents into these segments, we can ask ourselves “How does the potential audience relate to RBRC and rechargeable battery and cell phone recycling?”

Colors correspond to each segment’s tendency to recycle - greens for pro-recycling, blues for neutral, and reds for anti-recycling.



Segmentation Analysis Breakdown



Targeting Segments

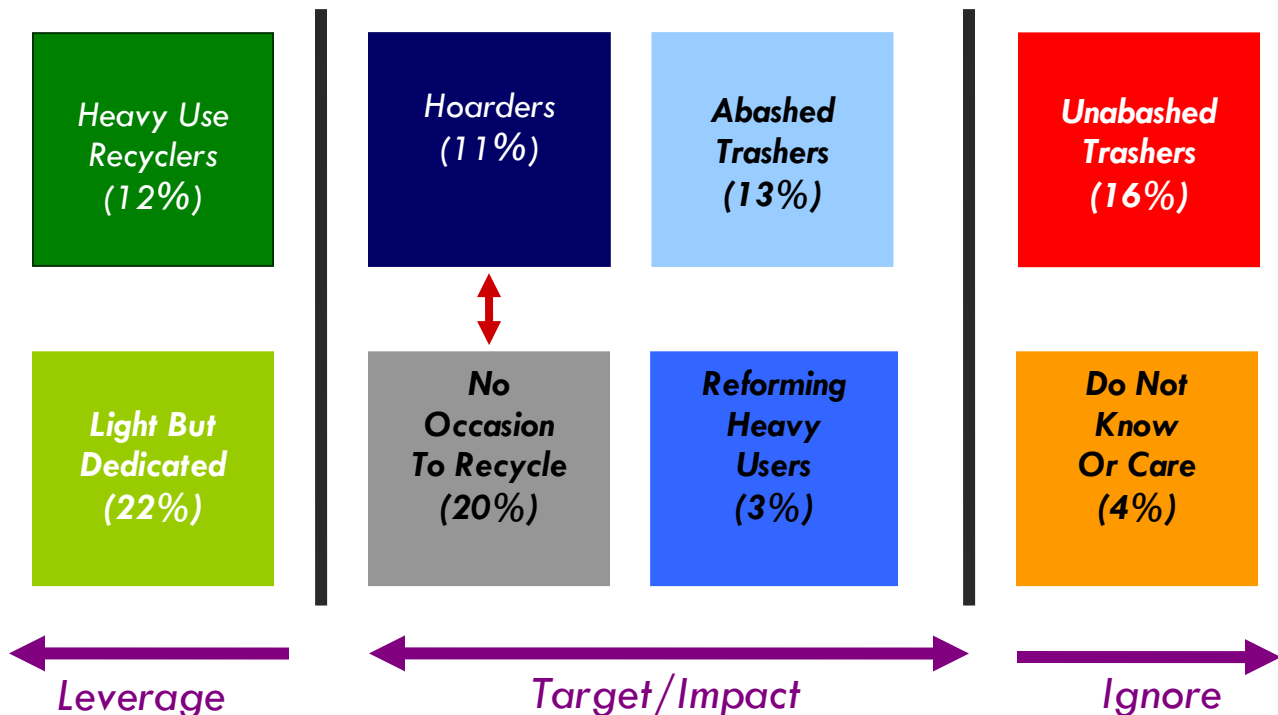
SELECTION OF TARGET MARKETS:

For RBRC, all segments except for the “Pro-Recyclers” (Heavy-Use Recyclers and Light But Dedicated) who are already performing recycling actions, and the “Non-Recyclers” (Unabashed Trashers and Don’t Know, Don’t Care) who are not likely to act, were considered potential target markets. However, given that the first criteria for selecting the target market was recycling behavior, second was recycling knowledge and third was likelihood to perform recycling-related actions, the target markets most likely to get results are the following:

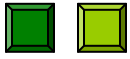
1. Hoarders (11%)
2. No Occasion to Recycle (20%)
3. Abashed Trashers (13%)
4. Reforming Heavy Users (3%)

These four high-potential consumer segments are relatively inexperienced with recycling but have an interest in improving their efforts.

Targeting the right segments can make our marketing efforts more efficient.

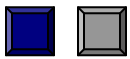


Marketing to Targeted Segments

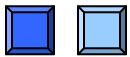


Leverage (Influence Others): Heavy User Recyclers + Light But Dedicated (total = 34%)

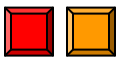
- ❖ These are “the choir,” so we don’t need to convince them
- ❖ We can use them to create word-of-mouth
- ❖ Use newsletters, website, etc to give them the tools, tips and techniques to get others to recycle rechargeable batteries
 - Materials to share
 - Ideas about how to persuade others
 - Buddy-system - recycle with your friends and families



Impact (Get Results): Hoarders + No Occasion to Recycle + Reforming Heavy Users + Abashed Trashers (total = 47%)



- ❖ Marketing resources should focus on the segments with the highest probability to reform
 - Increase awareness and educate segments about what and where to recycle
 - Selectively target pro-environment messages



Ignore (Not Worth the Effort): Unabashed Trashers + Don’t Know, Don’t Care (total = 19.9%)

- ❖ Negative attitudes and behaviors towards recycling & environmental issues

Market Segment.....	Perception of Rechargeable Battery/Cell Phone Recycling
Heavy-Use Recyclers.....	Recycling is important to me
Light But Dedicated.....	Recycling is important to me, but I don’t own/use many devices
Hoarders*	Recycling is important to me, but I like to keep my old batteries/cell phones
Reforming Heavy Users*...I didn’t know you could recycle batteries/cell phones, but now I’ll recycle	
Abashed Trashers*	I usually throw out my rechargeable batteries, but now I’ll recycle
Unabashed Trashers.....	Recycling isn’t important to me; I’ll keep throwing away my batteries
Don’t Know, Don’t Care	I don’t know about recycling, and I really don’t care about recycling
No Occasion to Recycle* ...I don’t change the batteries in my devices very often, so I don’t really think about recycling	

* Indicates Target Segments