



PaintCare™ Awareness Survey of Oregon Residents

July 2011

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## Overview

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*This was an online survey targeting residents of Oregon who have purchased paint in the last year (July 1, 2010 to June 30, 2011). In addition, however, respondents that have not purchase paint in the last year were still asked about basic awareness of the program. The following summary includes combined results from those who purchased paint (n=235), have not purchased paint (n=742), and those who paint for pay on either a part-time or full-time basis. (n=87). See Appendix 1 for individualized results.*

- With regard to seeing or hearing any advertisements about the PaintCare™ program, an average of 27% of all survey respondents (n=1,064) recall advertisements – or in other words, are aware of the program. There was no difference in program awareness between males and females. Respondents most likely to be aware:
  - Are aged over 65, (36% are aware)
  - Are residents of Portland Metro (35%), compared to residents of Eastern Oregon, who were least likely (12%).
  - Have an income over \$50,000 per year (29%)
  - Are college graduates or higher (37%)
- In terms of awareness of the PaintCare Recovery Fee, over 10% of all survey respondents (n=1,064) were aware of the fee. Females were slightly less aware (10%), compared to males at (13%). Residents most likely to be aware of fees:
  - Are residents of the Oregon Coast (17%), compared to residents of Southern Oregon who were least likely (8%).
  - Are those aged over 65, with an income over \$50,000 per year and are college graduates or higher.
- Out of those who are aware of the program (n=287), newspapers and television were the most often cited sources of information (48% and 37%, respectively). Retail posters were cited at 5% and retail rack cards were the lowest, at 1%. Note: amongst those who paint for pay, radios were cited more often than newspapers (46% and 42%, respectively).

*The following summary only includes respondents who purchased paint.*

- Respondents most frequently purchased their paint at:
  - home centers, 39%
  - paint stores, 20%
  - mass merchants, 19%
- The overwhelming majority (93%) of respondents answered that the fee did *not* have any impact on the quantity of paint they purchased most recently. Similarly, the vast majority (93%) of respondents said that the information they have seen or heard about the Oregon paint recycling program had no effect on the amount of paint they purchased or planned to purchase.
- About one third (31%) of respondents are aware of established drop off locations to collect leftover paint. The residents most likely to be aware live in Central Oregon and Portland Metro (47% and 41%, respectively). The least likely live on the Oregon Coast (16%).
  - 61% of residents who are aware of the program were also aware of a drop-off location.
- 45% of respondents live within 1-5 miles from the nearest drop-off location.
  - 63% of the respondents consider the drop-off locations to be convenient.
- 18% of respondents recall seeing a “paint calculator” during their most recent paint purchase.
  - Of that group, the vast majority (80%) did not use the “paint calculator” to help them decide how much paint they should purchase.
- Almost three quarters (72%) of respondents stored the paint from their most recent paint project for later projects or touch-ups. No one said that they recycled or donated paint from their paint purchase in the last year.

## Methodology

A total of 1064 surveys were conducted, providing a margin of error of +/- 3%, at 95% level of confidence. Interviews were conducted between July 7, 2011 and July 12, 2011.

Ages were monitored to ensure that no respondents were under the age of 18.

### Survey Demographics:

<b>Age</b>	Under 18 0%	18-24 4%	25-34 6%	35-44 14%	45-54 22%	55-65 30%	Over 65 23%
<b>Gender</b>	Male 32%	Female 68%					
<b>Region*</b>	Coast 8%	Portland Metro 41%	Central 7%	Willamette Valley 28%	Southern 12%	Eastern 3%	
<b>Income</b>	Under \$25,000 18%	\$25,000 - \$50,000 27%	\$50,000 - \$100,000 25%	Over \$100,000 8%			
<b>Education</b>	Less than High school 1%	High school graduate 15%	Some college or Associate's Degree 39%	College Graduate 17%	Post-graduate study/degree 10%		

\*Respondents were asked to select in which of the following Oregon regions they lived:

<b>Coast</b>	Astoria, Florence, etc
<b>Portland Metro</b>	Multnomah, Columbia, Clackamas, Washington, etc
<b>Central</b>	Columbia River Gorge, the Dalles, Bend, etc
<b>Willamette Valley</b>	Salem, Eugene, etc
<b>Southern</b>	Ashland, Medford, Klamath Falls, etc
<b>Eastern</b>	Pendleton, Ontario, etc

## Results: All respondents (who have and have not purchased paint, and those who paint for pay)

Note: Percentages are calculated based on demographic categories by columns.

### 11. During the past year, do you recall seeing or hearing any advertisements describing a program to collect leftover paint in Oregon?

		AGE						GENDER		REGION						INCOME				Pref no answr	Less Hgh Schl	Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post-grad	Pref no answr
	Total	18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	Metro	Centrl	Willmtt Valley	Sthrn	Eastn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k							
	1064	39	65	154	234	321	249	340	724	88	440	78	295	129	34	188	284	261	85	72	15	164	416	186	104	5
		4%	6%	14%	22%	30%	23%	32%	68%	8%	41%	7%	28%	12%	3%	18%	27%	25%	8%	7%	1%	15%	39%	17%	10%	0%
Yes	287	5	6	24	63	99	90	95	192	14	152	24	68	25	4	46	68	72	29	24	2	26	100	57	51	3
	27%	13%	9%	16%	27%	31%	36%	28%	27%	16%	35%	31%	23%	19%	12%	24%	24%	28%	34%	33%	13%	16%	24%	31%	49%	60%
No	777	34	59	130	171	222	159	245	532	74	288	54	227	104	30	142	216	189	56	48	13	138	316	129	53	2
	73%	87%	91%	84%	73%	69%	64%	72%	73%	84%	65%	69%	77%	81%	88%	76%	76%	72%	66%	67%	87%	84%	76%	69%	51%	40%

### 12. Where do you recall seeing advertisements or other information about the program to collect leftover paint in Oregon (select all that apply\*)?

		AGE						GENDER		REGION						INCOME				Pref no answr	Less Hgh Schl	Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post-grad	Pref no answr
	Total	18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	Metro	Centrl	Willmtt Valley	Sthrn	Eastn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k							
	287	5	6	24	63	99	90	95	192	14	152	24	68	25	4	46	68	72	29	24	2	26	100	57	51	3
		2%	2%	8%	22%	34%	31%	33%	67%	5%	53%	8%	24%	9%	1%	16%	24%	25%	10%	8%	1%	9%	35%	20%	18%	1%
Newspaper	137	2	2	3	24	48	58	44	93	9	69	13	28	16	2	18	29	40	21	9	2	12	41	36	25	1
	48%	40%	33%	13%	38%	48%	64%	46%	48%	64%	45%	54%	41%	64%	50%	39%	43%	56%	72%	38%	100%	46%	41%	63%	49%	33%
TV	107	1	2	10	17	41	36	41	66	4	52	11	26	13	1	23	25	23	8	12	2	7	41	21	20	0
	37%	20%	33%	42%	27%	41%	40%	43%	34%	29%	34%	46%	38%	52%	25%	50%	37%	32%	28%	50%	100%	27%	41%	37%	39%	0%
Radio	75	1	1	5	32	26	10	17	58	7	34	3	22	8	1	11	15	16	5	6	0	5	34	6	7	1
	26%	20%	17%	21%	51%	26%	11%	18%	30%	50%	22%	13%	32%	32%	25%	24%	22%	22%	17%	25%	0%	19%	34%	11%	14%	33%
Retail poster	15	0	0	0	4	8	3	6	9	0	8	0	5	1	1	3	2	7	0	1	0	2	6	3	2	0
	5%	0%	0%	0%	6%	8%	3%	6%	5%	0%	5%	0%	7%	4%	25%	7%	3%	10%	0%	4%	0%	8%	6%	5%	4%	0%
Retail Rack Card	4	0	0	0	0	3	1	3	1	0	4	0	0	0	0	1	0	0	1	0	0	0	0	1	1	0
	1%	0%	0%	0%	0%	3%	1%	3%	1%	0%	3%	0%	0%	0%	0%	2%	0%	0%	3%	0%	0%	0%	0%	2%	2%	0%
Internet	16	4	2	0	2	4	4	6	10	1	9	1	3	2	0	3	5	6	0	2	0	0	8	4	3	1
	6%	80%	33%	0%	3%	4%	4%	6%	5%	7%	6%	4%	4%	8%	0%	7%	7%	8%	0%	8%	0%	0%	8%	7%	6%	33%
Home Improvement Show	8	0	0	1	0	1	6	4	4	0	4	1	3	0	0	2	1	2	2	1	0	2	3	1	2	0
	3%	0%	0%	0%	0%	0%	2%	1%	1%	0%	1%	0%	1%	0%	0%	1%	0%	1%	1%	0%	0%	1%	0%	1%	0%	0%
Other, please specify	45	1	2	7	12	11	12	8	37	0	31	1	8	4	1	7	14	12	3	5	0	9	9	8	15	0
	16%	20%	33%	29%	19%	11%	13%	8%	19%	0%	20%	4%	12%	16%	25%	15%	21%	17%	10%	21%	0%	35%	9%	14%	29%	0%

\*Percentages may exceed 100% in some cases where respondents were permitted to select more than one response.

### 13. Recent Oregon legislation established a fee of between \$0.35 and \$1.60 (based on container size) and directed retailers to begin collecting this fee beginning in July 2010. Were you aware that such a fee is added to paint purchases?

		AGE						GENDER		REGION						INCOME				Pref no answr	Less Hgh Schl	Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post-grad	Pref no answr
	Total	18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	Metro	Centrl	Willmtt Valley	Sthrn	Eastn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k							
	1058	39	65	152	234	320	248	339	721	87	439	78	295	127	34	187	284	260	85	72	15	164	414	186	104	5
		4%	6%	14%	22%	30%	23%	32%	68%	8%	41%	7%	28%	12%	3%	18%	27%	25%	8%	7%	1%	16%	39%	18%	10%	0%
Yes	112	3	5	17	24	35	29	43	70	15	43	9	32	10	4	13	31	28	17	10	0	16	48	16	15	4
	11%	8%	8%	11%	10%	11%	12%	13%	10%	17%	10%	12%	11%	8%	12%	7%	11%	11%	20%	14%	0%	10%	12%	9%	14%	80%
No	944	36	60	135	210	285	219	296	651	72	396	69	263	117	30	174	253	232	68	62	15	148	366	170	89	1
	89%	92%	92%	89%	90%	89%	88%	87%	90%	83%	90%	88%	89%	92%	88%	93%	89%	89%	80%	86%	100%	90%	88%	91%	86%	20%

## Results: Respondents who have purchased paint only

### 10. At which retail outlet(s) have you purchased paint in the past year (select all that apply\*)?

Paint Store	48	20%
Home Center	91	39%
Lumber Yard/Building Supply Store	25	11%
Mass merchant	44	19%
Hardware Store	41	17%
Other, please specify	20	9%

\*Percentages may exceed 100% in some cases where respondents were permitted to select more than one response.

### 14. Thinking about your most recent paint purchase, did the fee have any impact on the quantity of paint you purchased?

		AGE						GENDER		REGION						INCOME					Pref no	EDUCATION						Pref no
	Total	18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	PrtInd	Metro	Centrl	Willmtt	Valley	Sthrn	Eastn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k	answr	Less Hgh Schl	Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post- grad	answr
	61	1	1	14	11	20	14	22	39	8	25	5	14	6	3			5	21	15	15	5	0	8	31	9	11	2
		2%	2%	23%	18%	33%	23%	36%	64%	13%	41%	8%	23%	10%	5%			8%	34%	25%	25%	8%	0%	13%	51%	15%	18%	3%
No, I purchased the same amount of paint.	57	1	1	13	10	18	14	19	38	8	23	4	13	6	3			5	19	14	14	5	0	8	28	9	11	1
	93%	100%	100%	93%	91%	90%	100%	86%	97%	100%	92%	80%	93%	100%	100%			100%	90%	93%	93%	100%	0%	100%	90%	100%	100%	50%
Yes, I purchased less paint.	4	0	0	1	1	2	0	3	1	0	2	1	1	0	0			0	2	1	1	0	0	0	3	0	0	1
	7%	0%	0%	8%	10%	11%	0%	16%	3%	0%	9%	25%	8%	0%	0%			0%	11%	7%	7%	0%	0%	0%	11%	0%	0%	100%
Yes, I traveled outside Oregon to purchase paint.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other, please specify.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

### 15. Based on your understanding of the information you have seen on the Oregon program, does the program cover the following types of paint products?

	Yes		No	Not sure
	Yes	No	Not sure	
Oil-based paint (cleans up with mineral spirits or paint thinner)	34	3	24	
	56%	5%	39%	
Latex (cleans up with water)	49	1	11	
	80%	2%	18%	
Paint thinner	15	8	37	
	25%	13%	62%	
Paints in containers of 5 gallons or larger	26	6	29	
	43%	10%	48%	

### 16. Are you aware of any drop-off locations that have been established to collect leftover paint?

	Total	AGE						GENDER		REGION						INCOME					Less Hgh Schl	EDUCATION				
		18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	PrtInd Metro	Centrl	Willmtt Valley	Sthrn	Eastn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k	Pref no answr		Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post- grad	Pref no answr
		235	4	17	36	52	72	54	85	150	25	90	15	63	35	7	30	69	79	36		21	1	34	114	49
		2%	7%	15%	22%	31%	23%	36%	64%	11%	38%	6%	27%	15%	3%	13%	29	34%	15%	9%	0	14%	49%	21%	15%	1%
Yes	73	1	2	5	17	27	21	31	42	4	37	7	15	8	2	10	17	27	15	4	1	7	34	14	15	2
	31%	25%	12%	14%	33%	38%	39%	36%	28%	16%	41%	47%	24%	23%	29%	33%	25%	34%	42%	19%	100%	21%	30%	29%	43%	100%
No	162	3	15	31	35	45	33	54	108	21	53	8	48	27	5	20	52	52	21	17	0	27	80	35	20	0
	69%	75%	88%	86%	67%	63%	61%	64%	72%	84%	59%	53%	76%	77%	71%	67%	75%	66%	58%	81%	0	79%	70%	71%	57%	0%

17. Thinking of the closest drop-off location, approximately how far is it located from your home or painting project?

Less than 1 mile	1	1%
1-5 miles	33	45%
5-10 miles	13	18%
10-25 miles	17	23%
Over 25 miles	4	5%
Not sure	5	7%
Total	73	100%

18. Do you consider that to be a convenient location for you to drop off leftover paint?

Yes	43	63%
No	25	37%
Total	68	100%

19. Thinking of your most recent paint purchase, do you recall seeing a “paint calculator” or other tool designed to help customers estimate the quantity of paint needed for their project?

Yes	15	18%
No	69	82%
Total	84	100%

20. Did you use the paint calculator or other tool help you decide how much paint to purchase for that project?

Yes	3	20%
No	12	80%
Total	15	100%

22. Did any information you may have seen or heard about the Oregon paint recycling program influence the amount of paint you purchased or planned to purchase?

	Total	AGE						GENDER		REGION						INCOME					Pref no answr	EDUCATION					
		18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	Metro	Centrl	Willmtt Valley	Sthrn	Eastrn	<\$25k	\$25k-\$50k	\$50k-\$100k	>\$100k	Less Hgh Schl		Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post-grad	Pref no answr	
		69	1	2	6	15	23	22	27	42	5	36	5	12	9	2	11	15	21	15		7	1	5	29	16	17
		1%	3%	9%	22%	33%	32%	39%	61%	7%	52%	7%	17%	13%	3%	16%	22%	30%	22%	10%	1%	7%	42%	23%	25%	1%	
Had no effect	64	1	1	6	14	22	20	25	39	5	35	5	11	6	2	11	12	20	15	6	1	5	26	15	16	1	
	93%	100%	50%	100%	93%	96%	91%	93%	93%	100%	97%	100%	92%	67%	100%	100%	80%	95%	100%	86%	100%	100%	90%	94%	94%	100%	
I purchased fewer containers of paint	2	0	0	0	1	1	0	1	1	0	0	0	1	1	0	0	1	0	0	1	0	0	1	1	0	0	
	3%	0%	0%	0%	7%	4%	0%	4%	2%	0%	0%	0%	8%	11%	0%	0%	7%	0%	0%	14%	0%	0%	3%	6%	0%	0%	
I purchased a smaller sized container	1	0	0	0	0	0	1	0	1	0	0	0	0	1	0	0	0	1	0	0	0	0	0	0	1	0	
	1%	0%	0%	0%	0%	0%	5%	0%	2%	0%	0%	0%	0%	11%	0%	0%	0%	5%	0%	0%	0%	0%	0%	6%	0%	0%	
Other, please specify	2	0	1	0	0	0	1	1	1	0	1	0	0	1	0	0	2	0	0	0	0	0	2	0	0	0	
	3%	0	50%	0%	0%	0%	5%	4%	2%	0%	3%	0%	0%	11%	0%	0%	13%	0%	0%	0%	0%	0%	7%	0%	0%	0%	



## 23. Thinking of your most recent painting project, what did you do with the leftover paint?

	Total	AGE						GENDER		REGION						INCOME					EDUCATION					
		18-24	25-34	35-44	45-54	55-65	>65	Male	Fem	Coast	Metro	Centrl	Willmtt Valley	Sthrn	Eastrn	<\$25k	\$25k- \$50k	\$50k- \$100k	>\$100k	Pref no answr	Less Hgh Schl	Hgh Schl Grad	Collg/ Assts Deg	Collg Grad	Post-grad	Pref no answr
	235	4	17	36	52	72	54	85	150	25	90	15	63	35	7	30	69	79	36	21	1	34	114	49	35	2
		2%	7%	15%	22%	31%	23%	36%	64%	11%	38%	6%	27%	15%	3%	13%	29%	34%	15%	9%	0%	14%	49%	21%	15%	1%
I didn't have any leftover paint/haven't completed the project.	45	0	2	8	13	12	10	18	27	11	14	4	8	7	1	1	12	19	7	6	0	6	21	9	9	0
	19%	0%	12%	22%	25%	17%	19%	21%	18%	44%	16%	27%	13%	20%	14%	3%	17%	24%	19%	29%	0%	18%	18%	18%	26%	0%
I used the leftover paint for another project.	17	1	1	2	3	5	5	5	12	1	7	1	5	2	1	5	3	7	2	0	0	3	6	6	2	0
	7%	25%	6%	6%	6%	7%	9%	6%	8%	4%	8%	7%	8%	6%	14%	17%	4%	9%	6%	0%	0%	9%	5%	12%	6%	0%
I disposed of the paint.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I stored the paint for later projects or touch-ups.	170	3	13	26	34	55	39	62	108	13	66	10	50	26	5	24	52	52	27	15	1	25	85	34	23	2
	72%	75%	76%	72%	65%	76%	72%	73%	72%	52%	73%	67%	79%	74%	71%	80%	75%	66%	75%	71%	100%	74%	75%	69%	66%	100%
I recycled or donated the paint.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't know/remember.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other, please specify	1	0	0	0	1	0	0	0	1	0	1	0	0	0	0	0	0	1	0	0	0	0	1	0	0	0
	0%	0%	0%	0%	2%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%

## Appendices

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### Appendix 1

#### **Q. 11. During the past year do you recall seeing or hearing any ads describing a program to collect leftover paint in Oregon?**

##### Amongst Individuals Who Purchased Paint:

36% of respondents recall seeing or hearing PaintCare ads (i.e. are *aware* of the program). There was no difference in awareness between male and female respondents. Portland Metro residents were most likely to be aware (50%). Oregon Coast residents were the least likely (20%).

##### Amongst Individuals Who Have Not Purchased Paint:

Around one quarter (25%) of respondents recall seeing or hearing PaintCare ads. There was no difference in awareness between male and female respondents. Portland Metro residents were most likely to be aware (30%). Oregon Coast residents were the least likely (8%).

##### Amongst Individuals Who Paint for Pay:

28% of paint for pay respondents recalled seeing or hearing PaintCare ads. Male paint for pay respondents were most likely to be aware of the program (32%), compared to females (25%).

#### **Q. 12. Where do you recall seeing ads or other information about the program to collect leftover paint in Oregon (select all that apply)?**

##### Amongst Individuals Who Purchased Paint:

Newspapers (56%) were the most frequently cited source of information, followed by television (37%). Retail posters received 7% and retail rack cards were the least cited source of information at 1%. Internet cited at 5%.

##### Amongst Individuals Who Have Not Purchased Paint:

Newspapers (45%) were the most frequently cited source of information, followed by television (38%). Retail posters received 5% and retail rack cards were the least cited source of information at 1%. Internet cited at 7%.

##### Amongst Individuals Who Paint for Pay:

Radios (46%) then newspapers (42%) were the most frequently cited sources of information. Both retail posters and rack cards were cited at 4% each. Internet cited at 0%.

Other sources of information cited: Metro Recycling Flyer, municipal newsletter.

**Q. 13. Recent Oregon legislation established a fee of between \$0.35 and \$1.60 (based on container size) and required paint manufacturers to begin adding this fee to the price of new paint beginning in July 2010. Are you aware that such a fee is added to the paint purchases?**

Amongst Individuals Who Purchased Paint: One quarter (26%) of respondents is aware that such a fee is added to paint purchases. There was no difference in awareness between male and female respondents.

Amongst Individuals Who Have Not Purchased Paint:

Only 6% of respondents are aware that such a fee is added to paint purchases. There was no difference in awareness between male and female respondents.

Amongst Individuals Who Paint for Pay:

Only 8% of respondents are aware that such a fee is added to paint purchases. Males were more likely to be aware (18%), compared to females (3%).