



Media Coverage Evaluation for



July 2008 - June 2009

IMPACT EVALUATION SERVICES LTD

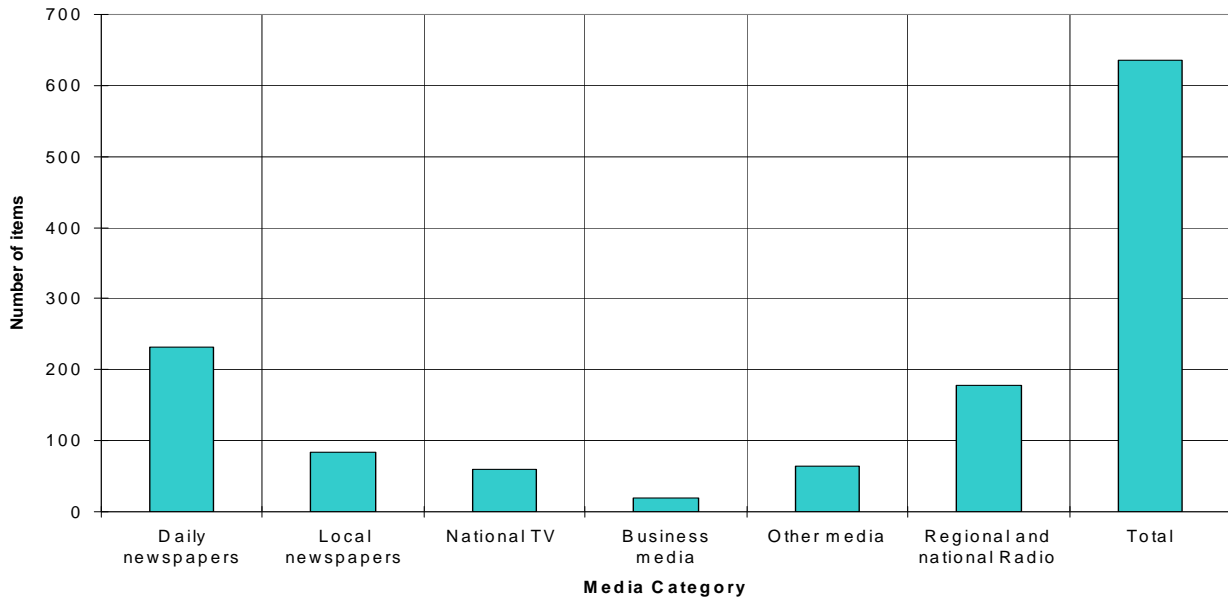
E-mail: info@impactwise.co.uk Web: www.impact-wise.co.uk

IMPACT report for New Zealand Packaging Accord

In this IMPACT report, we outline the media profile for New Zealand Packaging Accord in July 2008 - June 2009.

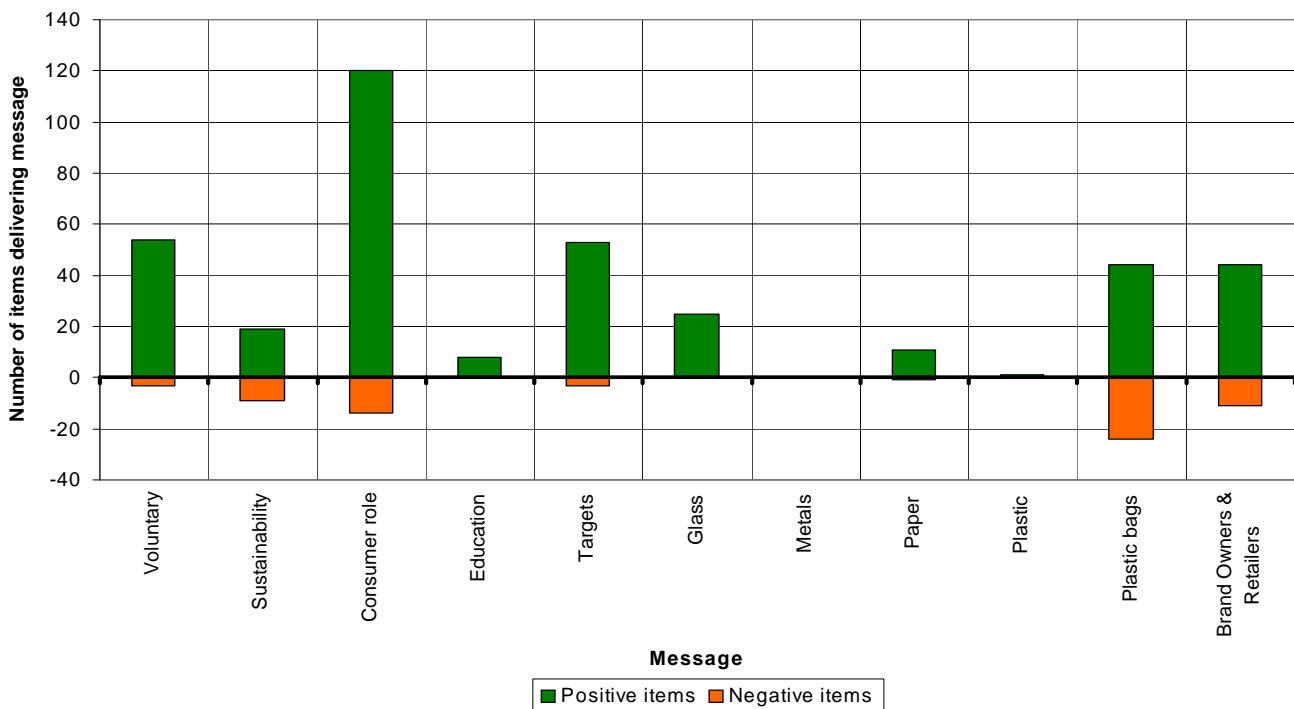
Your IMPACT Charts - Items

Chart 1a: Number of items by media category



Your IMPACT Charts – Messages

Chart 2: Message Delivery (Positive and Negative)



Your IMPACT Charts – Messages

Chart 3: Message Delivery (Net)

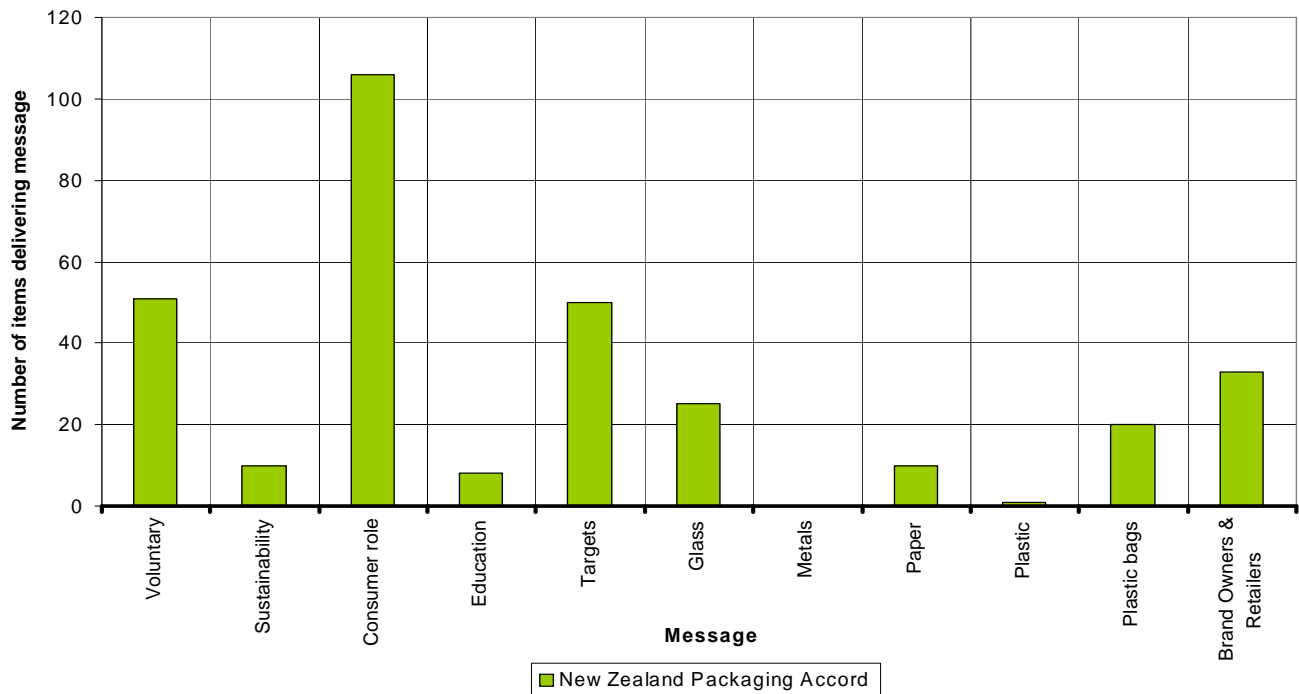
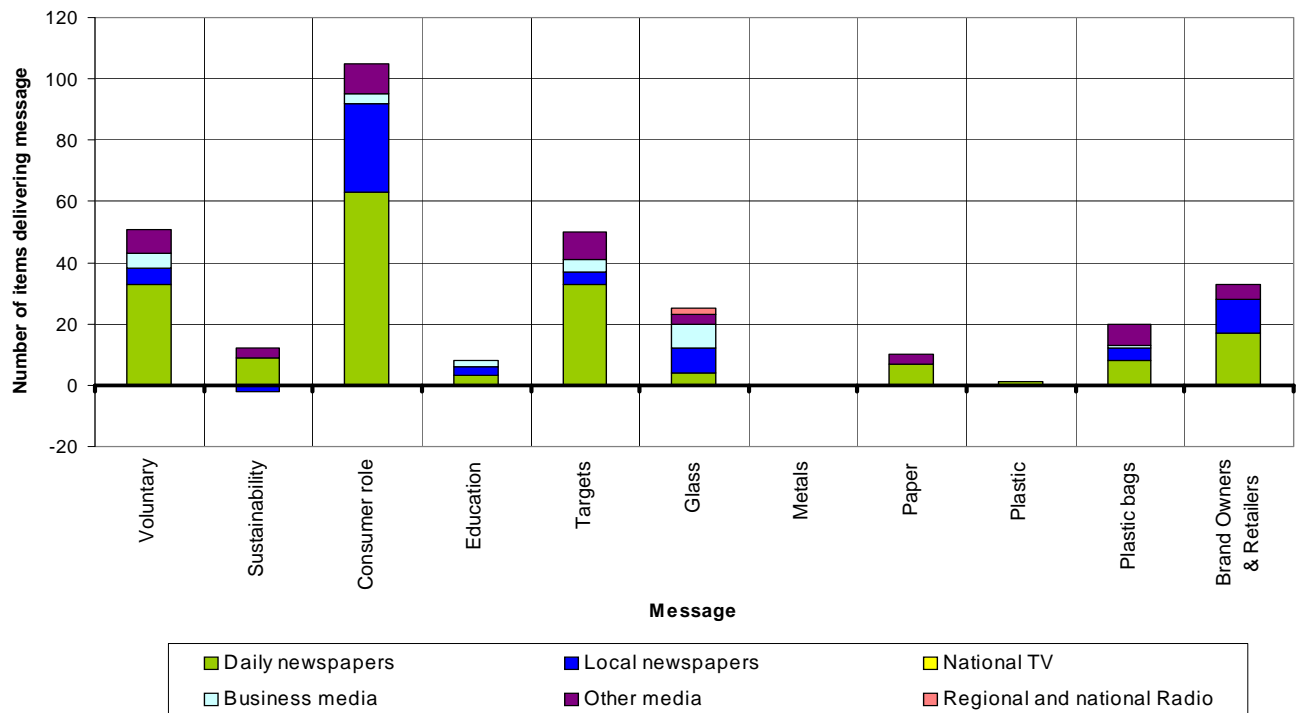
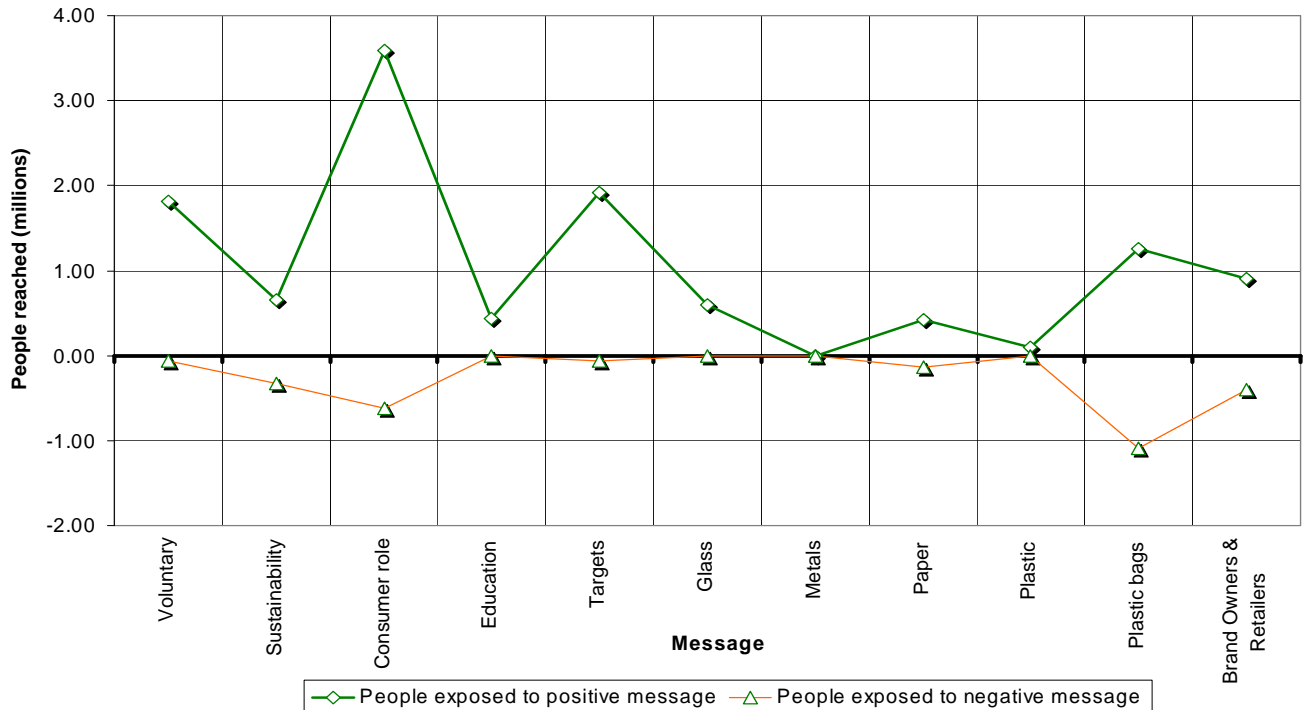


Chart 4: Messages by Media Category



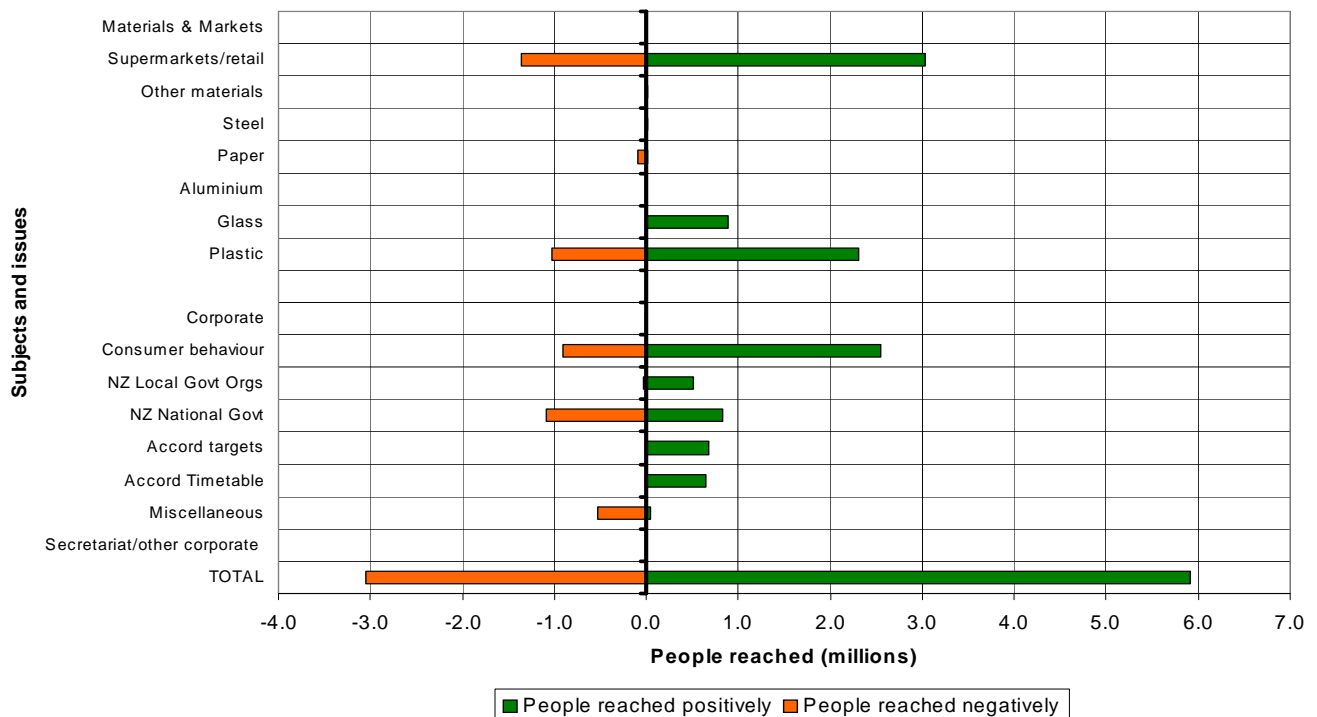
Your IMPACT Charts – Messages

Chart 5: People who were potentially exposed to the message



Your IMPACT Charts – Favourability

Chart 6: Favourability by Subject



Note the plastic favourability score incorporates some of plastic bags media where message was around plastic material.

OVERVIEW COMMENTARY

In this IMPACT report, we outline the media profile for New Zealand Packaging Accord in July 2008 - June 2009.

Volume and namechecks

There were over 600 items this year, a three-fold increase in the item levels of the previous year. This was due to packaging becoming a current consumer and citizen issue for debate, and thus a mainstream news item. This was reflected by a boost in the coverage from regional and national radio in particular, and also, increases in national TV and daily newspaper coverage.

Daily newspaper coverage contributed most items over the year, followed by regional and national radio, then local newspapers, other media (including online), and finally business media.

Favourability

Gross favourability for 2008/09 at nearly 6 million OTS, was higher than the previous year, but negative coverage, at just over 3 million, was almost double that of 2007/08.

High-scoring favourable pieces included:

- A piece on the important initiatives emerging from the Accord ('Storing up bags of trouble for the planet', Wanganui Chronicle – 2/4/09)
- A piece by Rachel Pinder (Waikato Times – 28/1/09) which reviewed progress towards the Accord, with lots of positive scores due to quotes from the NZ Retailers Association
- A raft of news coverage, from a news release, on the fact that all the individual targets for every type of packaging are being met (e.g. NZ Marketing – 07/08; Otago Daily Times, Oamaru Mail – 15/10/08)
- Coverage on glass recycling and subsequent applications was very positive

The news focus on plastic bags over the entire period also generated favourable coverage, particularly due to voluntary efforts being mentioned in connection with a possible plastic bag levy (e.g. Gisborne Herald – 22/01/09; Newport News – 17/04/09). The Accord was also mentioned in coverage on the Warehouse's introduction of a 10-cent plastic bag charge (e.g. Food Industry Week; Bay of Plenty Times – 20/3/09). Some news coverage of the rejection by the Prime Minister of a compulsory plastic bag charge noted that the Packaging Council says that the voluntary Packaging Accord has taken 100 m bags out of circulation (e.g. NZPA Newswire – 30/3/09).

Broadcast coverage was generally neutral.

A number of stories about landfill were negative in tone. For instance, dump fees were increasing (e.g. Hastings Mail – 11/3/09) and recyclables piling up due to a reduction in demand caused by the economic downturn (e.g. Otago Daily Times – 12/1/09).

Finally, towards the end of the period, Environment Minister Nick Smith's comments that the Government would 'not be renewing the Packaging Accord when it expires this year because it is not a particularly useful instrument and the new Act has the potential to beef up agreements with industry around reducing packaging' (NZPA Newswire – 14/05/09).

Message delivery

Overview

All messages were returned positively, save *metals*, which was not delivered. *Consumer role* was the most frequently occurring message in coverage, followed by *voluntary and targets*, then *brand owners & retailers*. Despite some negative coverage, *plastic bags and glass* were delivered quite positively. *Sustainability and paper* were also delivered modestly, with *education* and *plastic* returning trace positive scores.

Compared to 2007/08, the *consumer role*, *voluntary*, and *targets* messages were delivered more frequently, but *sustainability*, *brand owners & retailers*, and *plastic bags* were delivered less frequently.

Voluntary

There continued to be a significant amount of upbeat coverage noting success in meeting recycling targets and the voluntary, industry-led nature of the Accord. For instance, the continued debate on plastic bag levies noted the Accord's success in reducing the number of plastic bags in circulation (e.g. Otago Daily Times – 15/10/08; Timaru Herald – 30/3/09).

The Prime Minister rejects plastic bag levies: The Packaging Council says that the voluntary Packaging Accord has taken 100 m bags out of circulation (e.g. Daily News, Manawatu Standard, NZ Herald – 31/3/09).

The NZ Retailers Association position that the industry was on track to reach targets voluntarily, so a ban or tax was not required was gotten across in what might otherwise be viewed as a pro environmentalist piece (Westport News – 30/3/09).

However, the voluntary target of 20% reduction over five years for plastic bag use 'is pathetic' says campaigners (Otago Daily Times – 4/4/09)

Sustainability

The message was delivered strongly at the beginning of the period, through upbeat announcements on recycling targets being met (e.g. 'Kiwis get behind recycling efforts', - Nelson Mail, NZ Herald – 15/10/08; 'NZ reach world class high in recycling', Daily Post – 15/08/09).

Message delivery was reduced by news coverage of a proposed bailout for the NZ recycling industry, in the doldrums due to reduced demand caused by the economic downturn (e.g. Press, Dominion Post – 6/1/09), and the subsequent announcement that landfill levy will rise by a third (e.g. Hastings Mail, Napier Mail – 11/3/09). However, there were a couple of more positive pieces about the recycling business ('well sorted recyclables can sell', NZPA Newswire – 21/1/09).

Consumer role

The message was strongly delivered this year.

Most of the consumer messages were generated from news and comment on plastic bag use, especially in March and April 2009, when there was public debate on a potential government charge on plastic bags.

Opinion pieces and letters to the editor generated the message most effectively.

- 'Surely its up to us to think about what we put in bins and stop using liners?' noted a reader asked for their opinion on the great plastic bag debate (Bay of Plenty Times – 24/4/09)
- A suggestion that everyone should remove litter - other peoples' as well as their own - from public places ('Solution is in our own (gloved) hands', Otago Daily Times – 20/4/09)
- We need to get people onside to make Waitakere plastic bag free noted a Western Leader reader (26/3/09)

More generally, the plastic bag debate provided opportunities for 'vox pop' pieces:

- 'Plastic bag charge thrills green teens' headlined the Nelson Mail (18/4/09)
- People surveyed on plastic bag charges was generally in favour (Daily News – 21/4/09)
- 'A levy is the easiest way to break the habit of automatically taking 6 or 7 bags home when you go shopping' says local sustainability manager (Southland Times – 30/3/09)

There were some negative messages. A writer questioned the integrity of bag charges – they wanted lower costs not environmental protection ('A gigantic con', Nelson Mail – 24/4/09). And an opinion piece noted the writer 'sees through' the bag charge as marketing (Listener – 2/5/09).

Education

A piece on the 2009 Environmental Packaging Awards coincided with the final year of the NZ Packaging Accord, and showed how the industry is taking a complete supply chain approach to new product development (Management magazine – 04/09). Educating the public on glass recycling was seen as a significant success in several items of coverage. This was also reflected in several positive scores for the *consumer role* and *targets*.

Targets

Targets was delivered well through the following:

- A raft of new coverage in Spring 2008 that all Accord targets were being met (e.g. Oamaru Mail, NZ Herald, Nelson Mail – 15/10/08)
- Some of the news coverage on the plastic bag levy campaign delivered the message by providing the context that the levy was in addition to the Accord targets being met (e.g. Timaru Herald – 21/4/09)
- In news coverage of the Prime Minister rejecting a plastic bag charge, the Packaging Council says that the voluntary Packaging Accord has taken 100 million bags out of circulation (e.g. Daily News, Dominion Post, NZ Herald – 31/3/09)

Glass

Glass achieved good positive results in both the national/local news and in the business and trade press. Kiwis recycle three out of five glass containers (e.g. FMCG – 10/08). Despite the crash in some recycling markets, the bottle recycling market is still strong (Drinks Biz – 05/09). The good scores for glass recycling were also reflected in some of the other messages.

Metals

There was no message delivery over the period.

Paper

Upbeat news coverage in October 2008 that Kiwis have reached a 'world class high' in recycling, including meeting paper targets, and recycling 60% of packaging, generated the score (e.g. NZ Herald, Oamaru Mail, Otago Daily Times – 15/10/08).

At the beginning of 2009, a news story that recycled paper prices had dropped by 90%, returned the one negative score (Dominion Post – 6/1/09).

Plastic

There was trace message delivery for outpacing consumption in one news piece focusing on plastic bag reduction (Daily Post 20/4/09), but otherwise the message was absent.

Plastic bags

This was a frequently delivered message in coverage, with a number of organisations helping to get the message across, particularly in article coverage:

- Supermarket initiatives such as trials of reusable shopping bags at The Warehouse, frequently mentioned the Accord target of reducing plastic bag consumption by 20% by June 2009 (e.g. Daily Post – 12/1/09)
- Progressive Enterprises MD puts the case for current success on 20% targets (Timaru Herald – 16/4/09)

- Progressive Enterprises and Foodstuffs signed the Packaging Accord it was noted in a piece about their commitment and what is being achieved (Northern Advocate – 30/3/09)
- Rachel Pinder reviews progress towards the Accord, with lots of positive scores due to quotes from the NZ Retailers Association (e.g. Waikato Times - 28/1/09)
- Whilst the voluntary accord has helped reduce plastic bag use over three years, the levy is necessary to give an extra jolt (Otago Daily Times – 22/04/09)

The Accord is on track for a 20% reduction in plastic bags (e.g. Dominion Post – 30/3/09; Oamaru Mail – 27/12/08). Later on, plastic bag shopping reduction is on target to hit 20% reduction by July (FMCG – 04/09).

Negative delivery was generated by:

- News coverage that the Government was looking at a levy on plastic bag charges (e.g. Daily News, NZ Herald, Nelson Mail – 30/3/09) and subsequent comment by the Environment Minister that the current plastic bag use is 'excessive' (e.g. Dannevirke News – 3/4/09; The Press – 6/4/09)
- The 'Get Real' plastic bag campaign (e.g. Northern Advocate – 3/4/09; Otago Daily Times – 4/4/09).

Brand owners and retailers

This message was relatively frequently delivered over the period, although there was some negative delivery.

News coverage of the plastic bag levy campaign launch generated the message (e.g. Gisborne Herald, Hokitika Guardian, Northern Advocate – 30/3/09). The Wastebusters lobby group takes issue with packaging, and are lobbying for product stewardship schemes (e.g. Lakes District & Central Otago News – 7/5/09).

Some coverage of the powers of the Waste Minimisation Bill returned the message:

- Charges for plastic bags could be brought under product stewardship in the Waste Minimisation Bill ('Over use puts plastic bags fee in Government's sights', Lakes District & Central Otago news – 7/5/09)
- An opinion piece by a lawyer on the impact of the new Waste Minimisation Act, mentioned product stewardship responsibilities, focusing on IT industry (Reseller news – 20/3/09).

There were some positive mentions of individual brand owner action with regard to product stewardship:

- Holcim's used oil programme is the first to receive accreditation as a product stewardship scheme (Waitaki Herald – 3/6/09)
- BASF is the world's most admired chemical company, according to Fortune magazine. Its New Zealand manager mentions product stewardship (Grower – 04/09)

On the other hand, letters to the editor complaining that plastic bag levies would not solve the packaging problem generated a raft of negative message scores (e.g. Nelson Mail – 2/4/09; Listener – 2/5/09; Otago Daily Times – 25/4/09).

Your IMPACT Charts – Trends

Chart 7: Visibility – comparison with previous years

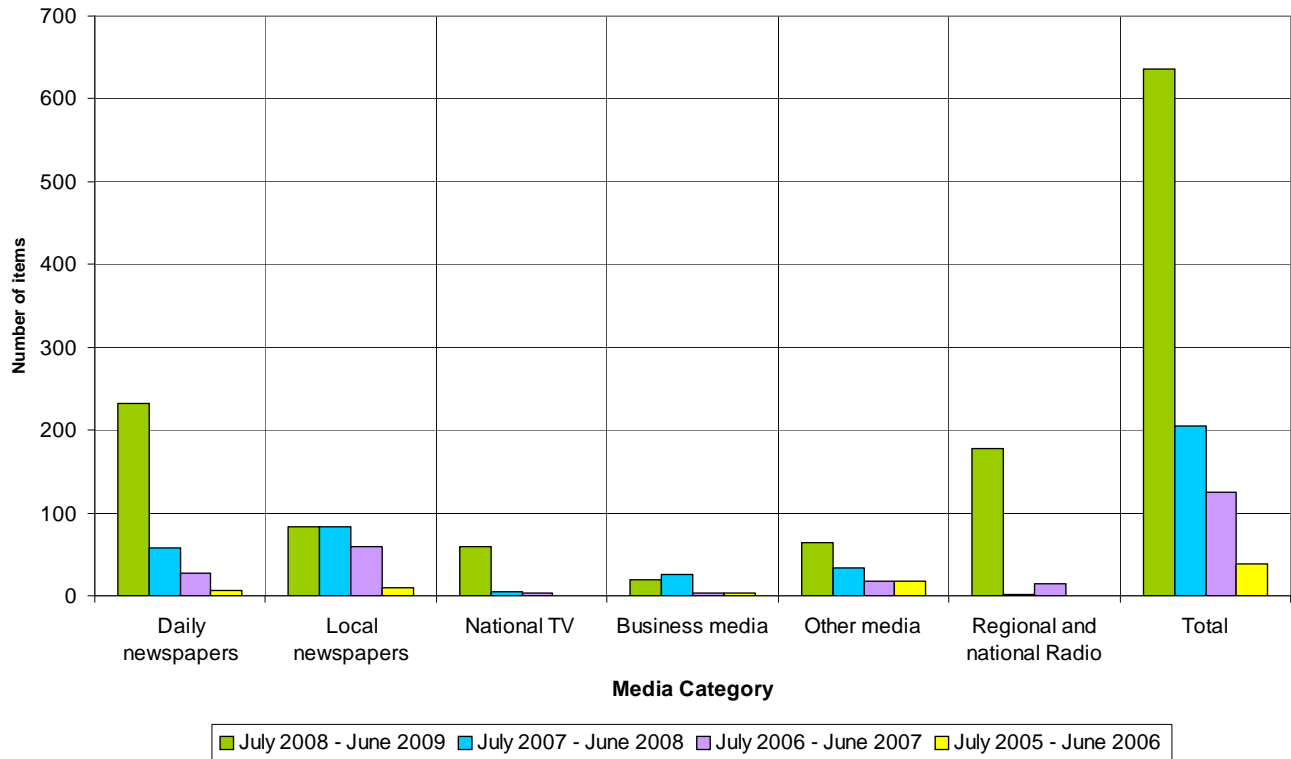
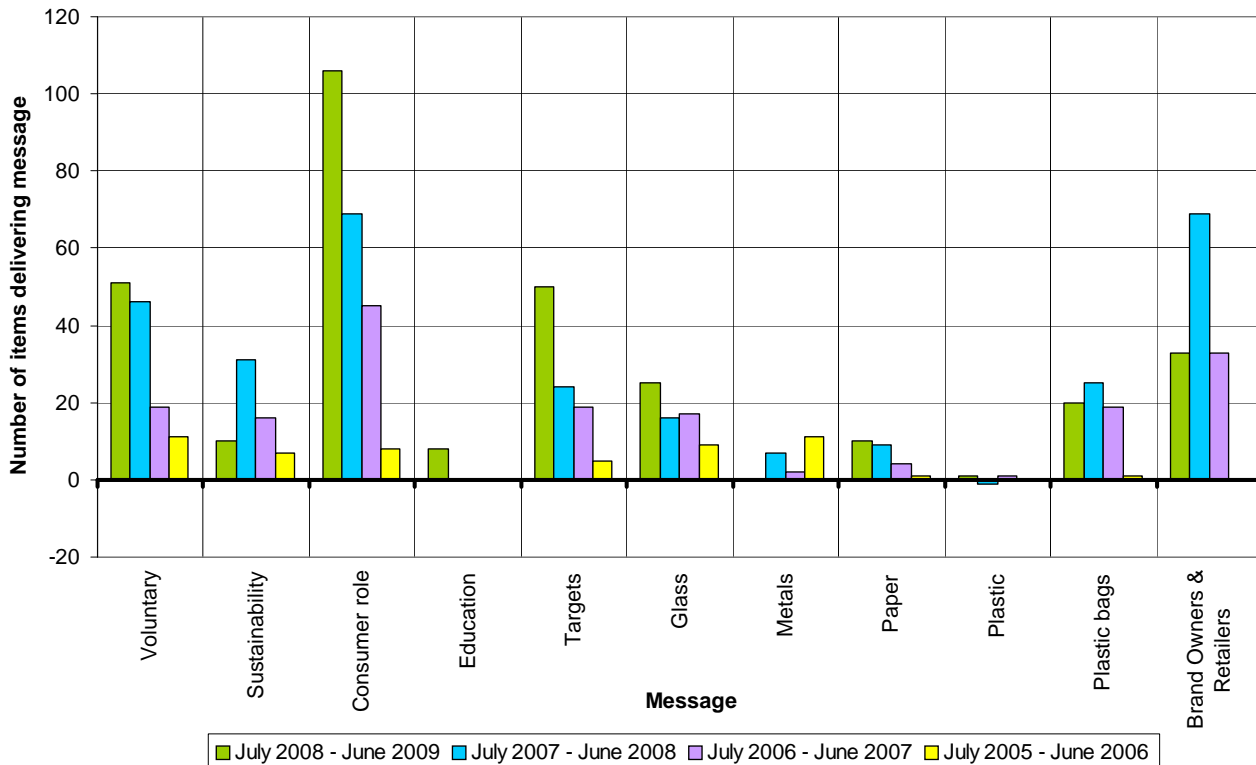
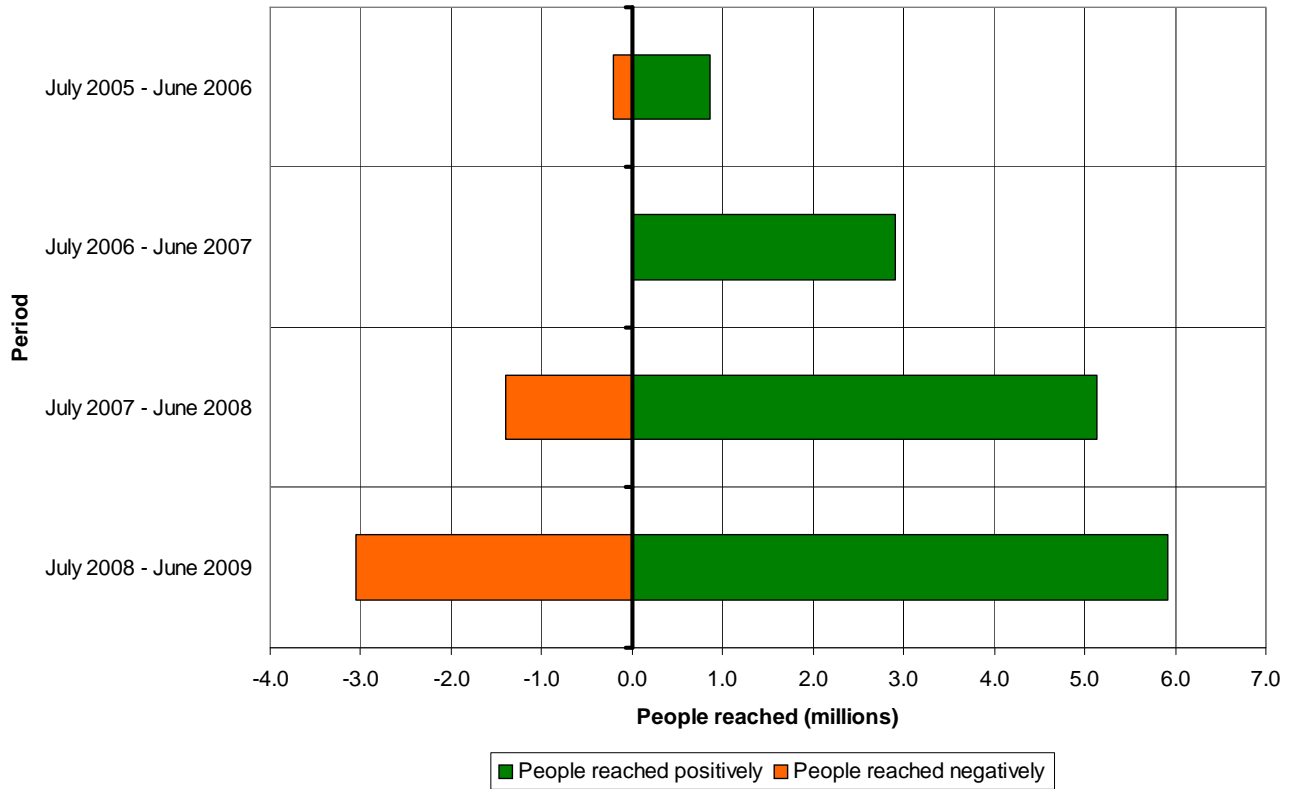


Chart 8: Message delivery - comparison with previous years



Your IMPACT Charts – Trends

Chart 9: Favourability – comparison with previous years



Your IMPACT Data Tables

Data table 1: Volume and namechecks

Media category	Number of namechecks	Number of items
Daily newspapers	144	232
Local newspapers	34	84
National TV	1	60
Business media	13	19
Other media	35	64
Regional and national Radio	3	178
Total	230	637

Data table 2: messages

Message	Positive items	Negative items	Net items
Voluntary	54	-3	51
Sustainability	19	-9	10
Consumer role	120	-14	106
Education	8	0	8
Targets	53	-3	50
Glass	25	0	25
Metals	0	0	0
Paper	11	-1	10
Plastic	1	0	1
Plastic bags	44	-24	20
Brand	44	-11	33

Data table 3: Subjects

People reached (OTS – millions)	Positive	Neutral	Negative
Corporate			
Secretariat/other corporate	0.00	0.00	0.00
Miscellaneous	0.05	22.20	-0.53
Accord Timetable	0.64	0.00	0.00
Accord targets	0.67	0.01	0.00
NZ National Govt	0.82	1.00	-1.09
NZ Local Govt Orgs	0.52	0.18	-0.04
Consumer behaviour	2.55	1.01	-0.90
Materials & Markets			
Plastic	2.31	3.20	-1.02
Glass	0.88	0.43	0.00
Aluminium	0.00	0.00	0.00
Paper	0.01	0.20	-0.09
Steel	0.01	0.00	0.00
Other materials	0.01	0.00	0.00
Supermarkets/retail	3.03	2.00	-1.36
TOTAL	5.92	27.03	-3.05

Data table 4: Performance indicators	
Average score per item	%
Message:	
Voluntary	10.5
Sustainability	5.4
Consumer role	8.8
Education	10.0
Targets	12.5
Glass	12.4
Metals	0.0
Paper	9.2
Plastic	30.0
Plastic bags	4.6
Brand	5.8
Favourability	4.5

Measurement parameters

The following tables list the various parameters measured during the analysis that form the basis of this report.

Table 1: Organisations

New Zealand Packaging Accord

Table 2: Target Media

Daily newspapers	Local newspapers	National TV	Business media	Other media
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Regional and national Radio

Table 3: Messages

<i>Voluntary</i>	The Accord is a voluntary, industry-led initiative
<i>Sustainability</i>	The Accord is there to improve the sustainability of New Zealand's packaging and reduce waste to landfill
<i>Consumer role</i>	Consumers have decisions to make about packaging – when they buy and how to discard
<i>Education</i>	The Accord has delivered educational programmes to promote recycling
<i>Targets</i>	The Accord has set targets for recovery & recycling of key materials & plastic shopping bags and these targets are being met
<i>Glass</i>	Success in finding alternative recycling uses (i.e. in addition to making glass containers) for recovered glass has resulted in higher recycling rates
<i>Metals</i>	Steel and aluminium are 100 per cent recyclable.
<i>Paper</i>	New Zealand's paper recovery rate is one of the highest in the world
<i>Plastic</i>	Plastic recycling is outpacing consumption rates with new market opening up
<i>Plastic bags</i>	Accord wants a 20% reduction in plastic bag use by retailers.
<i>Brand Owners & Retailers</i>	Manufacturers of brands and retailers are playing a key role in product stewardship

Table 4: Subjects and Issues

Corporate				
Secretariat/other corporate	Miscellaneous	Accord Timetable	Accord targets	NZ National Govt
NZ Local Govt Orgs	Consumer behaviour			
Materials & Markets				
Plastic	Glass	Aluminium	Paper	Steel
Other materials	Supermarkets/retail			

Methodology

This IMPACT analysis was carried out in the following way. First, the IMPACT team prepares a written brief. This document is used to instruct the analysts unambiguously on the messages being communicated, and the media in which exposure was desired.

The analysts then read the cuttings and transcripts and measure volumes of coverage and the number of namechecks. The analysts also mark the individual cuttings for message delivery and overall favourability. Depending on the brief, a number of subjects, issues and other variables may be associated with each cutting or transcript.

Finally, the analysts prepare a unique numbered form for each cutting and return it to IMPACT - by email - where the data is consolidated and specific publication data added. This consolidated data forms the basis of these charts and tables.

For any further questions on the data in this report, please contact Dr Rob Walker on 020 7837 0400 and for new projects contact James Davies on 07799 404547.



Media evaluation – Audience Research – Comms ROI