

## **Plastic Free July worldwide uptake – Ipsos Global Advisor Survey**

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### **Executive Summary**

Plastic Free July recently commissioned the Melbourne office of Ipsos, a global research company, to undertake a global survey. The aim was to find out how aware and engaged people around the world were regarding the Plastic Free July challenge.

Between 21 September and 5 October 2018, 19,295 respondents from 26 countries around the globe participated in the online survey. Of those people:

- 29% were aware of the Plastic Free July challenge
- Of that 29%, 45% took part in 2018 (which is a 30% jump from 2017)
- Awareness amongst Australians was the same as the global average (29%) but more Aussies got involved in 2018 (49%) compared to the global average (45%)

Plastic Free July participation in each surveyed country was estimated using Ipsos Global Advisor Survey results (1) combined with World Bank population data (2-3) and an estimation of the percentage of the adult population that was sampled by Ipsos in each country (4).

The Ipsos data, combined with World Bank data shows that an estimated 120 million adults participated in Plastic Free July 2018 across 26 surveyed countries, including 2 million participants in Australia, 10 million in the USA, 3 million in the UK and 20 million in India.

Although only 26 countries were surveyed, it's important to note that Plastic Free July had participants from 177 countries in 2018 (5).

## Methodology

### Ipsos Global Advisor Survey

Ipsos was commissioned to undertake this survey for Plastic Free July. Interviews were conducted between September 21 and October 5, 2018 through the Ipsos Global Advisor survey. Surveys included the following questions:

Q1. Before today, had you heard about a challenge called Plastic Free July, which encourages people to refuse and reduce single-use plastics? (Yes/No)

If Q1 = Yes Q2a. Did you take part in Plastic Free July in 2018? (Yes/No)

If Q1 = Yes Q2b. Did you take part in Plastic Free July in 2017? (Yes/No)

The Ipsos Global Advisor survey instrument is conducted monthly in 27 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America. Serbia is not included in these results.

The 19,295 participants were all aged between 18 and 64 in the US and Canada, and between 16-64 in all other countries. Most countries had more than 1,000 participants, except Argentina, Belgium, Chile, Hungary, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey. Those countries had approximately 500+ participants each.

For more information on the precision of online polls and how Ipsos uses credibility intervals, you can [visit the Ipsos website](#).

15 of the 26 countries surveyed online generate nationally representative samples in their countries (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and United States).

Brazil, China, Chile, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey produce a national sample that is more urban & educated, and with higher incomes than their fellow citizens. Ipsos refers to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.

### Interpretation of Survey by Plastic Free July

Professional services to interpret the Ipsos survey were provided by consulting Behavioural Economist Colin Ashton-Graham.

You'll find in Table 1 the results of the Ipsos Global Advisor Survey (1) combined with World Bank population data (2-3) and estimates of middle class ('upper deck') population (4) used to estimate Plastic Free July participation for each surveyed country.

To work out the estimated percentage of the adult population that participated in Plastic Free July in each country, responses to Question 1 and Question 2a were multiplied (Table 1, label d). For each country, the estimated percentage population of adult age (15-64 years) (Table 1, label f) was taken from World Bank population data (4).

The % of adult population covered by the Ipsos sample in each country was estimated from World Bank Regions data (Table 1, label k). In the 11 countries where respondents referred to by Ipsos as "Upper Deck Consumer Citizens" (and not nationally representative of their country), regional and developing country data from a World Bank Review (5) was used to provide an estimated percentage adult "middle class" population. World Bank education performance (5) was used to assign an Ipsos sample reach of between 80 and 90% to each of the 15 high income countries surveyed (the assumption being that an online survey instrument can reach and represent a majority, but not all of the population). These figures were then combined with the adult population count (Table 1, label g) to calculate relevant estimated population counts covered by the Ipsos sample in each country (Table 1, label l).

The best realistic estimation of Plastic Free July participants within each surveyed country were found by multiplying the estimate percentage of the adult population and the relevant estimated population count.

Plastic Free July participation estimates are based on the World Bank population estimates for persons aged 15 to 64 and the Ipsos samples of persons aged 16 to 64 (or 18 to 64 in US and Canada). This method assumes that the Ipsos survey results would be unchanged had persons aged 15 been included in the 'adult sample' (and persons aged 15 to 17 in US and Canada).

### **Estimating future participation based on registration data**

Participants are encouraged to [officially register for the challenge](#) at the Plastic Free July website. Widespread sharing of the campaign online globally, through the media and social media, and through individuals and organisations has seen more and more people take on the challenge, without necessarily officially registering online for the Plastic Free July challenge (especially in countries outside Australia).

In other words, knowing how many people participate in Plastic Free July each year isn't as simple as checking who is registered. This was reflected in a baseline survey of the general Western Australian population conducted in February 2017. It found that for every person registered to do the Plastic Free July challenge, 64 unregistered participants were also doing it. This ratio has developed significantly since then.

The number of Plastic Free July registrations within the countries surveyed (Table 1, label a), combined with the estimated participation of adult persons (Table 1, label m) shows us what that ratio looks like now. It can also help with future tracking to understand and



estimate what actual participation in Plastic Free July looks like around the world (even without everyone registering online).

## Data sources

1. Ipsos Global Advisor Results – October 2018
2. World Bank data: total population count (all ages)  
<https://data.worldbank.org/indicator/SP.POP.TOTL>
3. World Bank data: estimated percentage population adult age (15-64 years)  
<https://data.worldbank.org/indicator/SP.POP.1564.TO.ZS?view=chart>
4. World bank data: estimated percentage of middle class ('upper deck') population (pages 4 & 6) <http://www.worldbank.org/content/dam/Worldbank/document/MIC-Forum-Rise-of-the-Middle-Class-SM13.pdf>
5. Plastic Free July registrations came from 177 countries and reported events in schools and workplaces. Plastic Free July database of sign-ups (accessed 31/07/2018)

**TABLE 1 - Ipsos Global Advisor Survey**

	PFJ data	IPSOS Global survey 2018 (persons aged 16 to 64, except US and Canada sample aged 18 to 64)				World Bank Data			Calculations with data		NOTES on IPSOS sample	Best estimate of PFJ Participating count		
LABELS	a	b	c	d	e	f	g	h	i	j	k	l	m	
<b>Country *</b>	<b>PFJ Signups as at 31 July 2018 **</b>	<b>Q1 % of adult opn aware of PFJ</b>	<b>Q2 % of aware who participated in 2018</b>	<b>Estimated % of adult popn participating (b x c)</b>	<b>Total popn count all ages</b>	<b>% popn adult age (15 to 64 yrs)</b>	<b>adult popn count (e x f)</b>	<b>Estimated PFJ participation count (d x g)</b>	<b>Ratio of estimated participation per PFJ registration (h / a)</b>	<b>19,295 adults across 26 countries, but some country samples are only from educated urban (upper deck) populations</b>	<b>Estimated % of adult population covered by the IPSOS sample (using World Bank data) ***</b>	<b>Relevant estimated popn count (eg 'upper deck') (g x k)</b>	<b>Realistic estimated PFJ Participation count (d x l) ****</b>	<b>realistic Ratio of estimated participation per PFJ registration (m / a)</b>
Argentina	51	14%	30%	4.2%	44,271,041	64%	28,333,466	1,190,006	23,333		80%	22,666,773	952,004	18,667
Australia	22,884	29%	49%	14.2%	24,598,933	65%	15,989,306	2,272,080	99		90%	14,390,376	2,044,872	89
Belgium	273	30%	33%	9.9%	11,372,068	64%	7,278,124	720,534	2,639		90%	6,550,311	648,481	2,375
Brazil	257	20%	34%	6.8%	209,288,278	70%	146,501,795	9,962,122	38,763	Upper deck' sample	40%	58,600,718	3,984,849	15,505
Canada	1,871	15%	50%	7.5%	36,708,083	67%	24,594,416	1,844,581	986		90%	22,134,974	1,660,123	887
China	52	51%	49%	25.0%	1,386,395,000	72%	998,204,400	249,451,280	4,797,140	Upper deck' sample	20%	199,640,880	49,890,256	959,428
Chile	91	26%	56%	14.6%	18,054,726	69%	12,457,761	1,813,850	19,932	Upper deck' sample	30%	3,737,328	544,155	5,980
France	413	15%	28%	4.2%	67,118,648	62%	41,613,562	1,747,770	4,232		90%	37,452,206	1,572,993	3,809
United Kingdom	5,463	24%	38%	9.1%	66,022,273	64%	42,254,255	3,853,588	705	IPSOs surveyed Great E	90%	38,028,829	3,468,229	635
Germany	937	10%	21%	2.1%	82,695,000	65%	53,751,750	1,128,787	1,205		90%	48,376,575	1,015,908	1,084
Hungary	172	44%	27%	11.9%	9,781,127	67%	6,553,355	778,539	4,526		80%	5,242,684	622,831	3,621
India	520	64%	70%	44.8%	1,339,180,127	66%	883,858,884	395,968,780	761,478	Upper deck' sample	5%	44,192,944	19,798,439	38,074
Italy	303	22%	18%	4.0%	60,551,416	63%	38,147,392	1,510,637	4,986		80%	30,517,914	1,208,509	3,988
Japan	69	30%	5%	1.5%	126,785,797	60%	76,071,478	1,141,072	16,537		90%	68,464,330	1,026,965	14,884
Malaysia	77	69%	71%	49.0%	31,624,264	69%	21,820,742	10,689,982	138,831	Upper deck' sample	20%	4,364,148	2,137,996	27,766
Mexico	316	33%	55%	18.2%	129,163,276	66%	85,247,762	15,472,469	48,964	Upper deck' sample	20%	17,049,552	3,094,494	9,793
Peru	43	32%	39%	12.5%	32,165,485	65%	20,907,565	2,609,264	60,681	Upper deck' sample	10%	2,090,757	260,926	6,068
Poland	74	22%	42%	9.2%	37,975,841	68%	25,823,572	2,386,098	32,245		80%	20,658,858	1,908,878	25,796
Russia	56	12%	34%	4.1%	144,495,044	68%	98,256,630	4,008,871	71,587	Upper deck' sample	20%	19,651,326	801,774	14,317
Saudi Arabia	8	27%	57%	15.4%	32,938,213	62%	20,421,692	3,142,898	392,862	Upper deck' sample	60%	12,253,015	1,885,739	235,717
South Africa	923	35%	57%	20.0%	56,717,156	66%	37,433,323	7,467,948	8,091	Upper deck' sample	20%	7,486,665	1,493,590	1,618
South Korea	76	56%	43%	24.1%	51,466,201	73%	37,570,327	9,046,935	119,039		80%	30,056,261	7,237,548	95,231
Spain	409	18%	35%	6.3%	46,572,028	66%	30,737,538	1,936,465	4,735		80%	24,590,031	1,549,172	3,788
Sweden	116	19%	45%	8.6%	10,067,744	62%	6,242,001	533,691	4,601		90%	5,617,801	480,322	4,141
Turkey	68	21%	27%	5.7%	80,745,020	67%	54,099,163	3,067,423	45,109	Upper deck' sample	30%	16,229,749	920,227	13,533
United States of America	10,365	14%	44%	6.2%	325,719,178	66%	214,974,657	13,242,439	1,278		80%	171,979,726	10,593,951	1,022
<b>TOTALS/ All countries</b>	<b>45,887</b>	<b>29%</b>	<b>45%</b>	<b>13.1%</b>	<b>4,462,471,967</b>		<b>3,029,144,917</b>	<b>746,988,106</b>					<b>120,803,232</b>	

\* Countries marked in orange indicate respondents who are "Upper Deck Consumer Citizens" who are not nationally representative of their country

\*\* From a total of 55,627 signups with countries identified as at 31.07.18. Total database was approximately 60,000 signups at that stage - the remainder don't include country of sign-up as it wasn't a required field until 2016.

\*\*\* In the 12 countries where respondents were referred to by Ipsos as "Upper Deck Consumer Citizens" (and therefore not nationally representative of their country), regional and developing country data from a World Bank Review was used to provide an estimated percentage "middle class" population. World Bank education performance was used to assign an Ipsos sample reach of between 80 and 90% to each of the 15 high income countries surveyed (the assumption being that an online survey instrument can reach and represent a majority, but not all of the population)

\*\*\*\* The PFJ Participation estimates are based on the World Bank population estimates for persons aged 15 to 64 and the IPSOS samples of persons aged 16 to 64 (or 18 to 64 in US and Canada). This method assumes that the IPSOS survey results would be unchanged had persons aged 15 been included in the 'adult sample' (and persons aged 15 to 17 in US and Canada)

Best PFJ participation estimate in number of adult persons

Best ratio for future tracking of sign ups as a sample of true participation (use if IPSOS survey not repeated in 2019)