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Consumer attitudes to plastic packaging recycling

MAY 2023



Research commissioned by the Plastic Packaging Product Stewardship (PPPS) co-design project led by The Packaging Forum and the NZ Food & Grocery Council.

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Executive Summary

Understanding NZ consumers' behaviours, knowledge and attitudes around plastics recycling

Recycling Behaviours

Plastic bottles/containers are regularly recycled through kerbside recycling

The main barriers are mixed material parts and the impact of food residue. Confusion is also a key barrier e.g. plastic numbering system, along with the effort required, and some lack of trust in the system

Awareness of the Soft Plastics recycling scheme is reasonable, however usage is a lot lower reflecting the limited access and lack of convenience / extra effort required

On-pack labelling is a critical source of information for consumers (the ARL label is most informative), with councils recognised as a source of information as well

Knowledge / Beliefs

Plastics are believed to have the greatest negative impact on the environment – well ahead of metal and liquid paper board

Few have a clear idea of what happens to their plastics recycling (and even lower for soft plastics), although those using the scheme have a better understanding. The majority believe (hope) most of it is recycled in NZ with some going to landfill

'Carbon off-setting' and 'container return schemes' are reasonably well understood, and while they have heard of 'net zero' most would struggle to explain it

Response

Half of NZ'ers say they would recycle a lot more if they knew and trusted what happens with recycling

'Soft plastic packaging' and 'plastic containers' are the terms consumers most associate with different plastic types

The bottle return scheme is very appealing in principle – ideally through a local collection centre or able to recycle at home (with digital refund); further exploration of this topic is needed to understand how best to activate

Guidelines for PPPS

Needs to engage consumers emotively and empower/enable them to make a difference

Functionally the scheme must deliver:

- National approach
- Clear guidelines and labelling
- Ease / convenience – little extra effort required
- Little/no cost / additional benefits
- Knowledge and understanding of what happens to recycling (for those who want to know more)

Messaging will differ by target group and needs to be tested

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01

Research Context

RESEARCH BACKGROUND:

Research objectives

To effectively and confidently gauge NZ consumers' knowledge, attitudes and behaviours around plastic packaging recycling to help shape the co-design of an effective Plastic Packaging Product Stewardship scheme (PPPS)

Sampling details:



SAMPLE

All NZ'ers aged 18+ years

Sample Size:
n=1002



GEOGRAPHY

Nationally representative of New Zealand



FIELDWORK

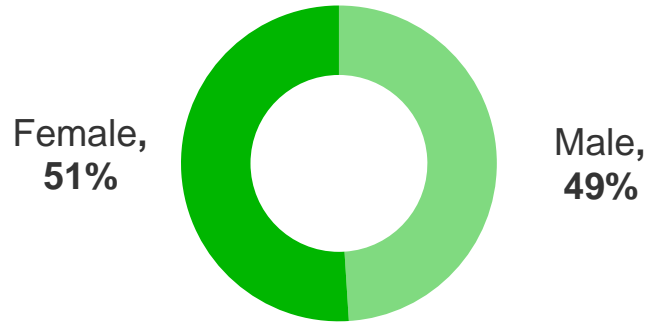
Methodology:
12min online survey

Fieldwork conducted from 3rd - 12th May, 2023

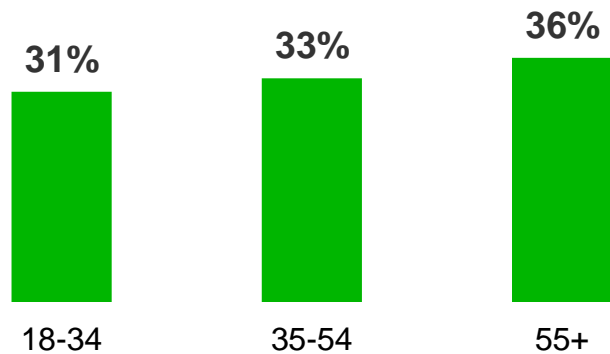


Who did we talk to ...

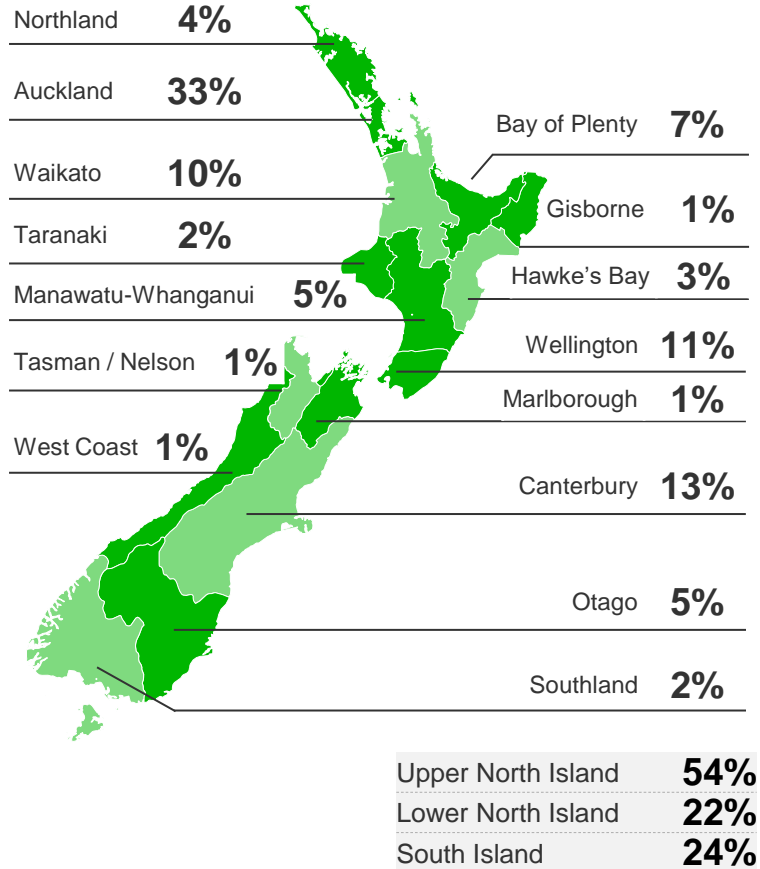
GENDER



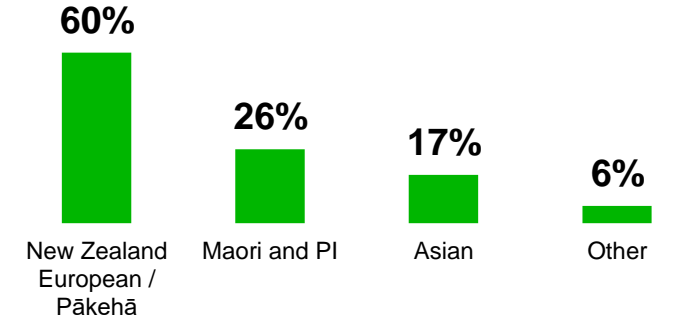
AGE



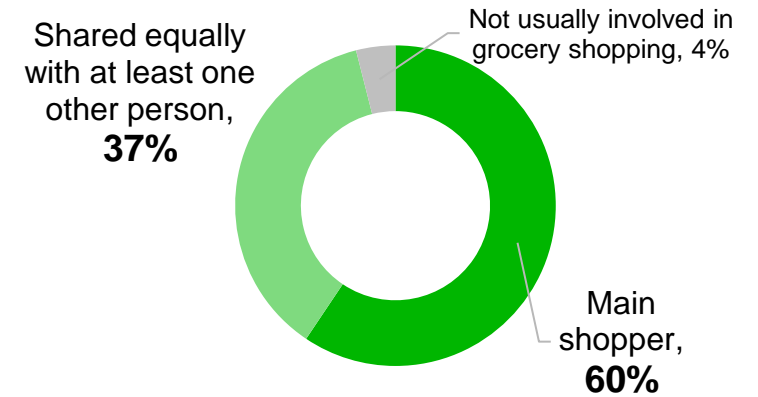
REGION



ETHNICITY

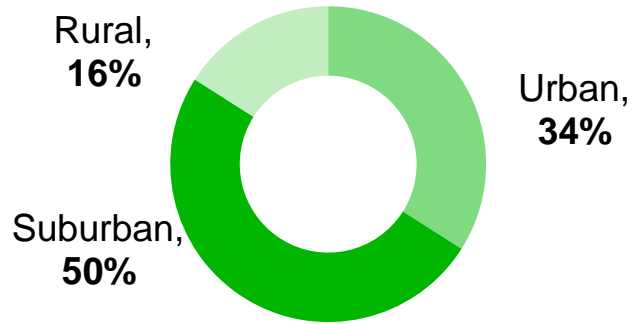


HOUSEHOLD SHOPPER

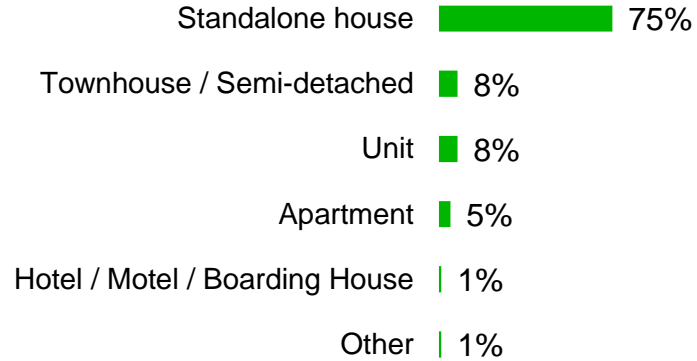


What is their household like?

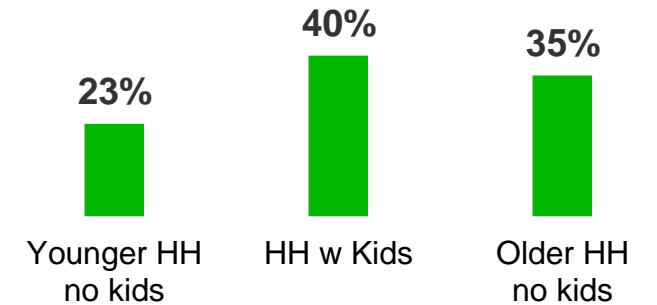
LOCATION



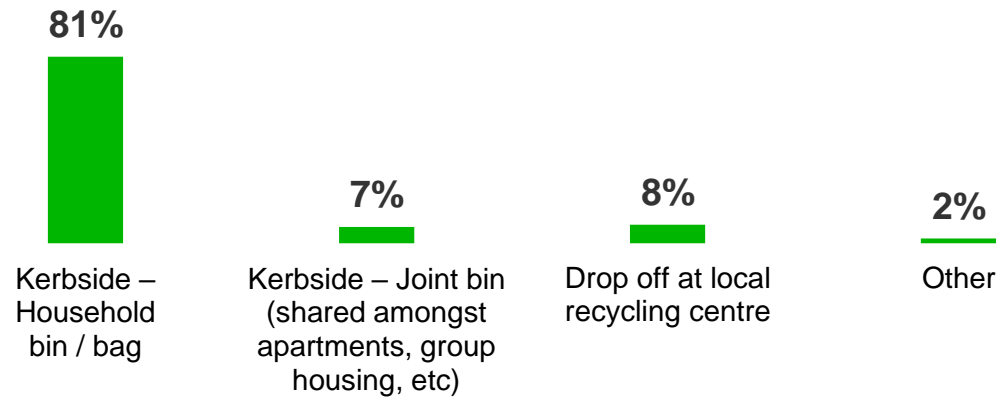
DWELLING SITUATION



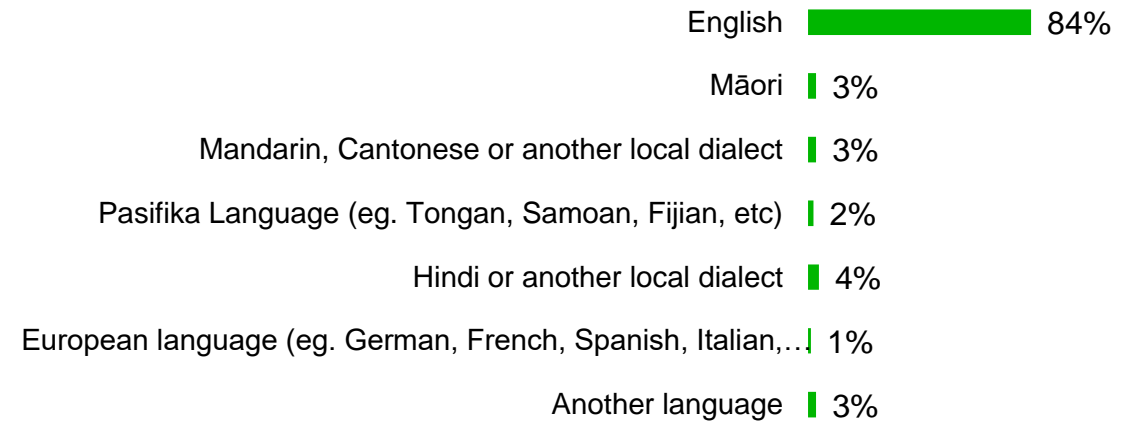
HOUSEHOLD



RECYCLING TYPE



MAIN LANGUAGE SPOKEN AT HOME



We use Kantar's global model to identify four sustainability segments in New Zealand based on a combination of their values and their actions

Kantar Sustainability Consumer Segmentation



Actives

Strong sustainability beliefs, taking sustainable action



Believers

Strong sustainability beliefs, but little sustainable action



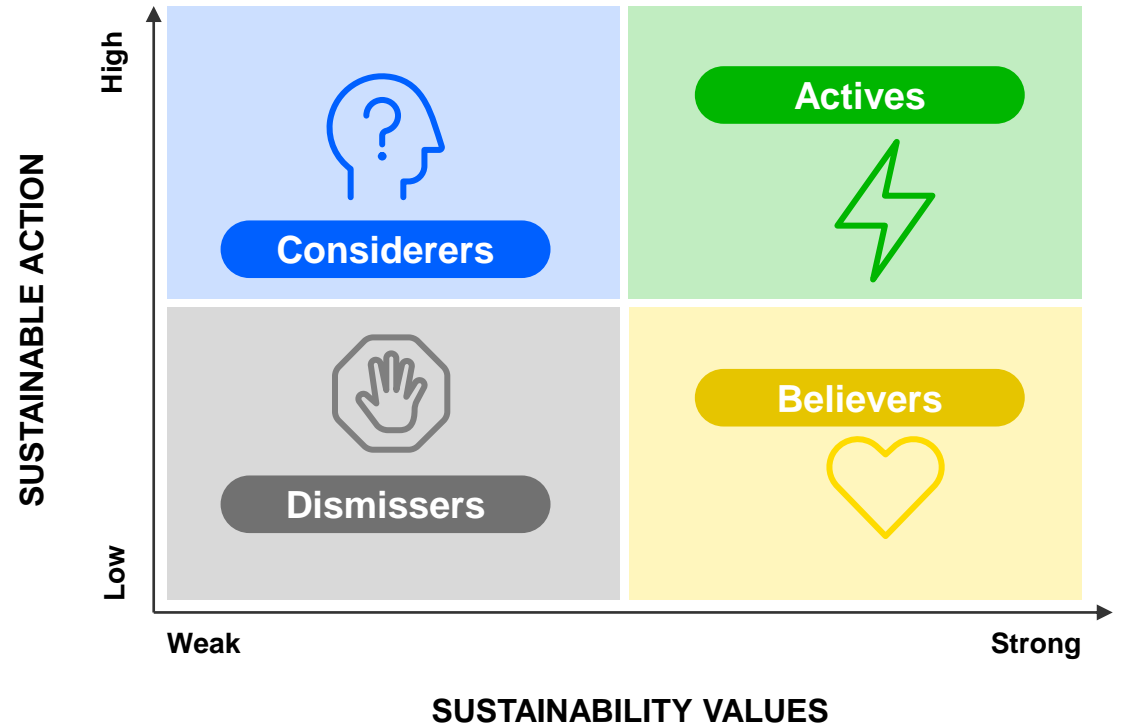
Considerers

Weak sustainability beliefs, some sustainable action

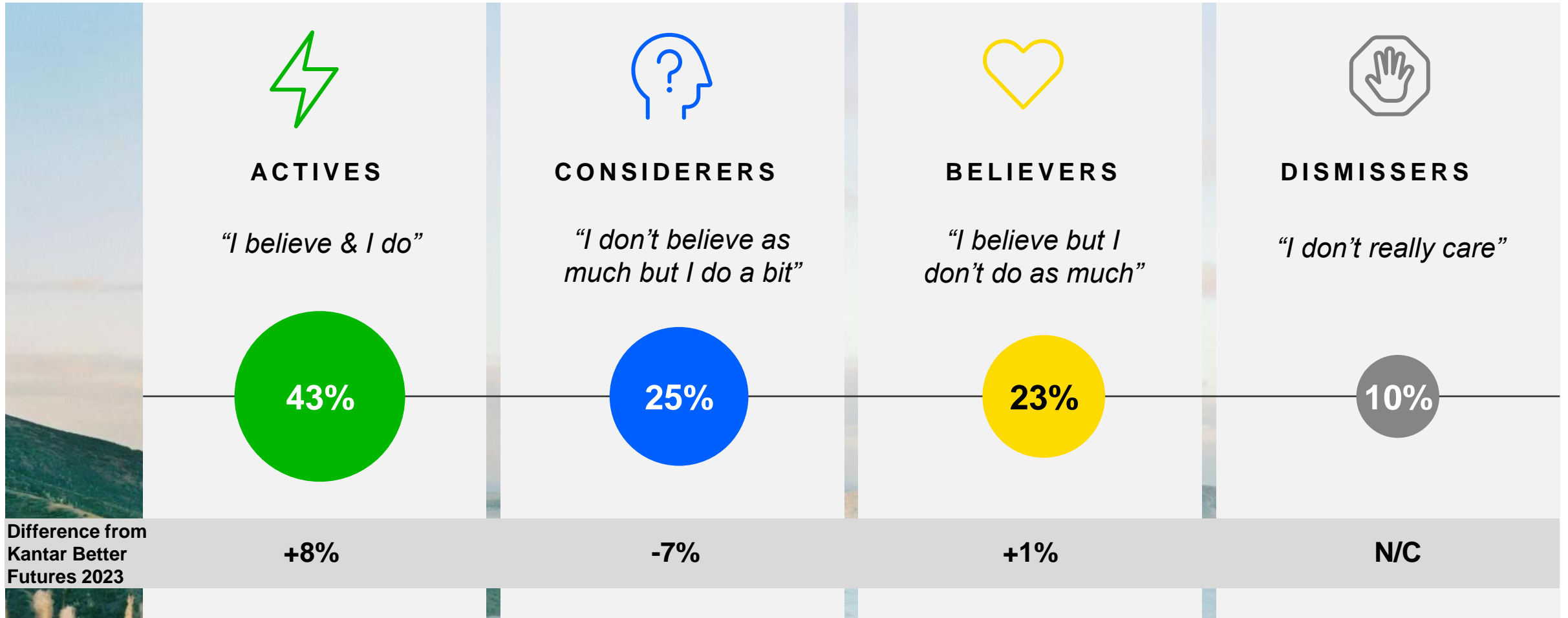


Dismissers

Virtually no sustainability beliefs or action



Our study sample has a more engaged profile than our recent Kantar Better Futures study (higher proportion of EcoActives and fewer EcoConsiderers)



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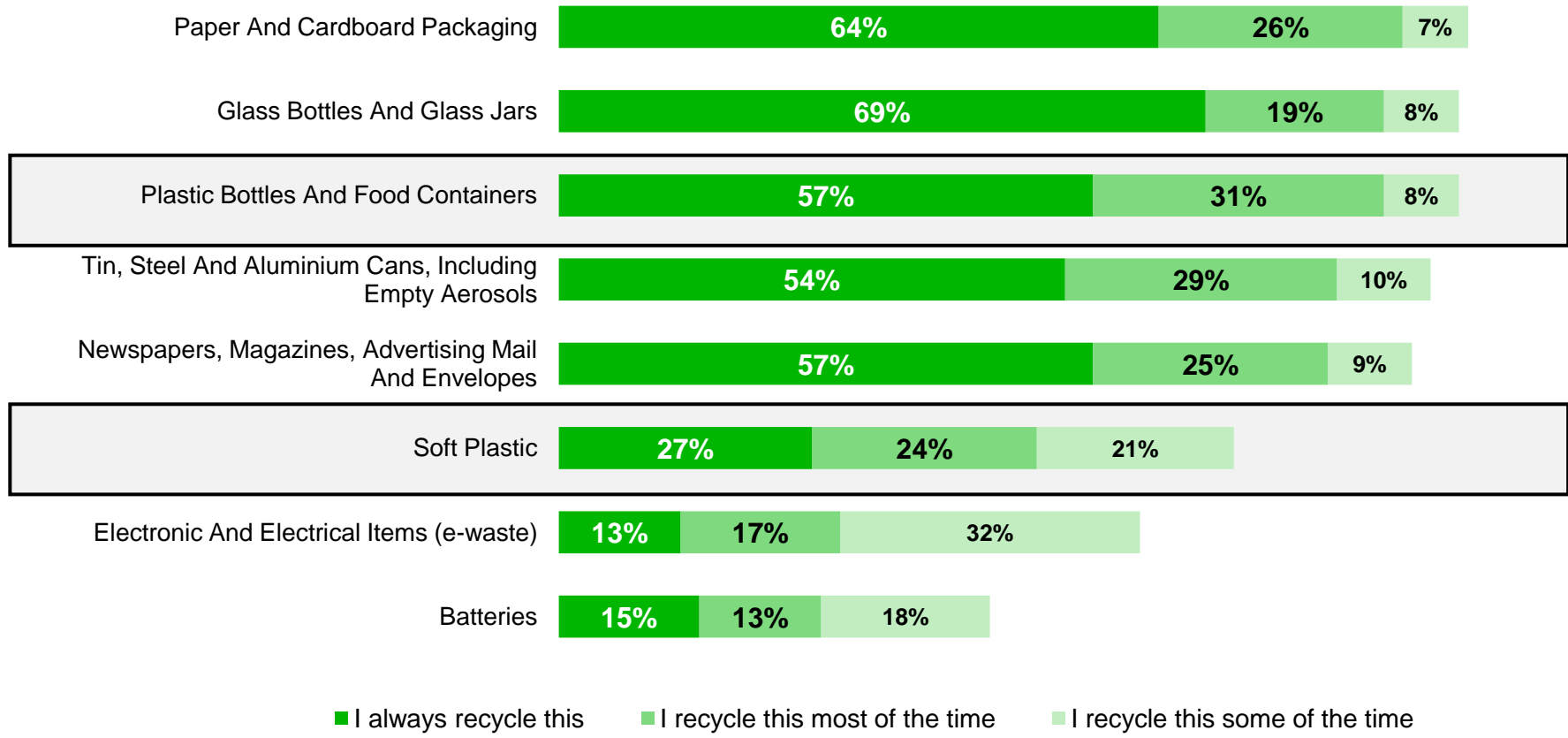
Recycling
Behaviour



 **PLASTIC PACKAGING
PRODUCT STEWARDSHIP**

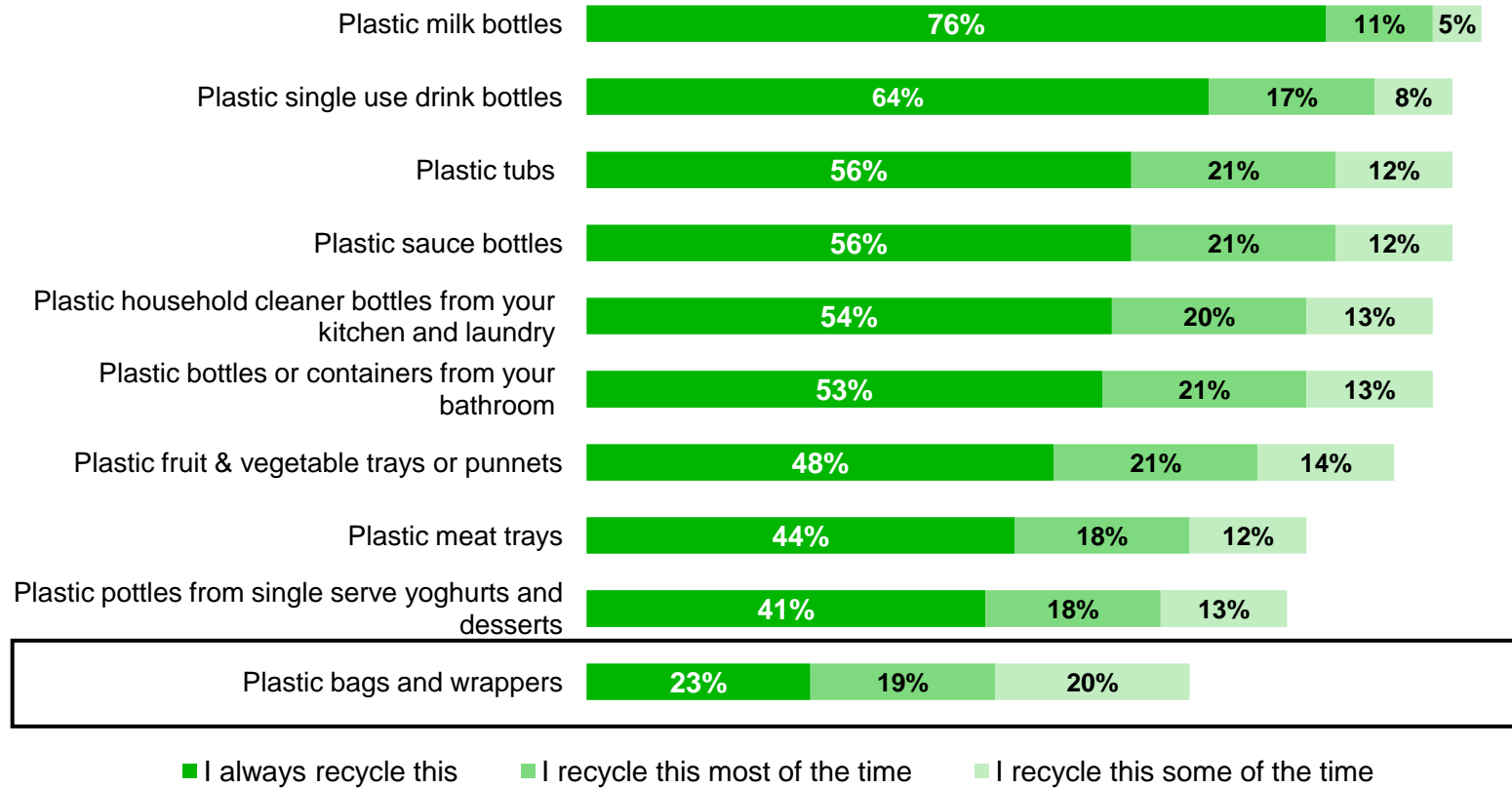
Plastic bottles/containers are recycled equally with other kerbside recycling materials; soft plastics are less frequently recycled (although ahead of other non-kerbside materials)

General Recycling Behaviour



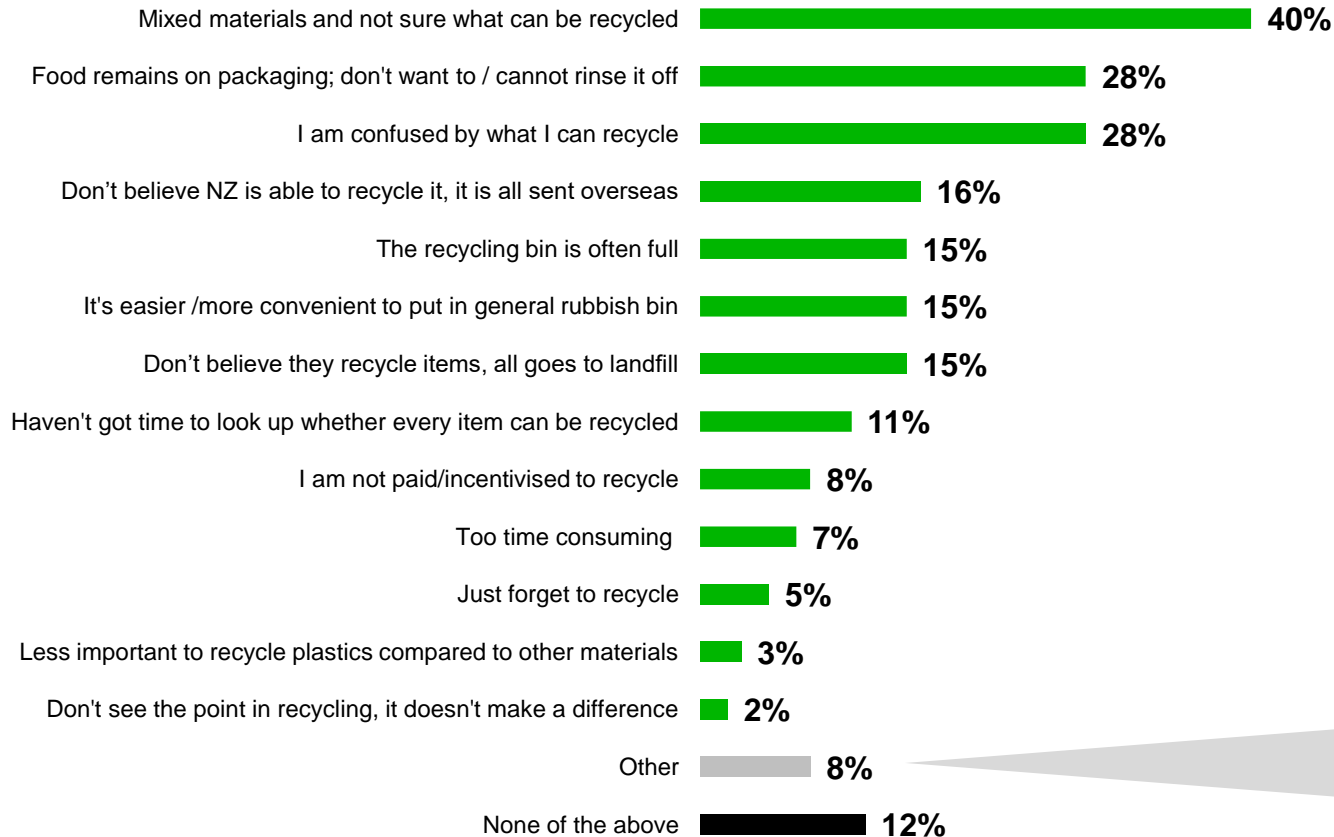
Plastic bags and wrappers are less likely to be recycled than plastic containers – reflecting the understanding that these items cannot simply be put in kerbside recycling

Plastic Recycling Behaviour



The key barrier to recycling plastics is the presence of mixed materials and impact of food residue. Confusion is also a barrier, with inconvenience and trust in the system also apparent

Reasons for not recycling plastic packaging at home...



OTHER REASONS:

Recycling is not available in our area.

I pay excess water bills now don't want to use more water to wash stuff to recycle it.

If in doubt only then does it go into general waste bin.

If they are not 1,2 or 5 I am unsure where to recycle them and put in bin.

Local councils simply do not allow most recyclables to be recycled, and will refuse your bin if you put the wrong things in.

My council only supplies containers for glass and plastic. I'm not prepared to sort the other things and sort something to put them in.

Environmental cost of recycling exceeds cost of disposal.

I recycle what I can but I have real trouble reading the numbers as they are so SMALL.

I live rurally and recycling hours for my nearest town is when I work, I simply cannot get there. No recycling on our street.





*I think recycling **needs to be easier** - have recycling bins in public places, make it easy for people to recycle (soft plastic recycling logo on products or the one that shows what parts can and can't be recycled). (18-24, Female, EcoActive)*

*I understand we are trying to save the environment but it is **very confusing** and **not always easily accessible** to everyone. I would like to recycle more but the time consumption and confusion stops me. (35-44, Female, EcoActive)*

*We all need to recycle more but it needs to be made **easier to identify** what can be and should be recycled. Numbering system works well for me but we don't currently recycle all numbers as some items I believe go to the tip. NZ needs to have the **infrastructure** to recycle more. (65+, Female, EcoBeliever)*

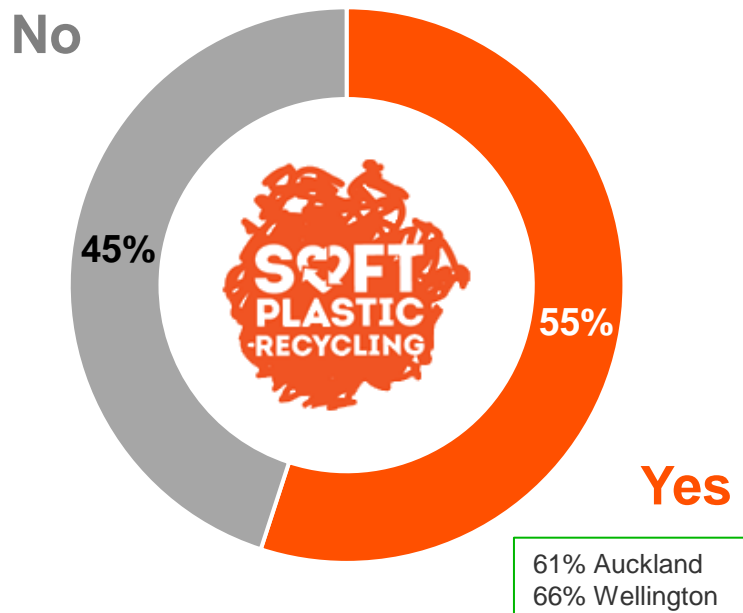
***Confusion** has almost led to us giving up on what we recycle. (45-54, Male, EcoActive)*

*The whole topic is **so confusing** that it is **overwhelming** to have to think about it. Different towns have different recycling systems which end up in different processes / sites. We travel a lot and trying to work out how to recycle in different places is difficult. Need a national system so we understand it all. (55-64, Female, EcoBeliever)*

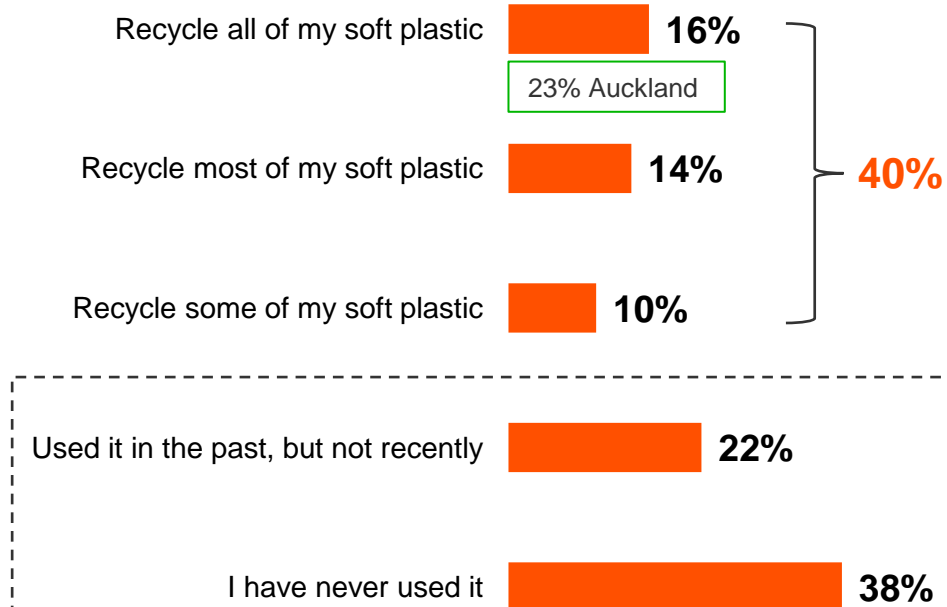


Awareness of a recycling scheme is the first hurdle, but while over half of NZ'ers are aware of the soft plastic recycling programme, usage is low (only 40% of those aware of it, use it)

Awareness of Soft Plastic Recycling

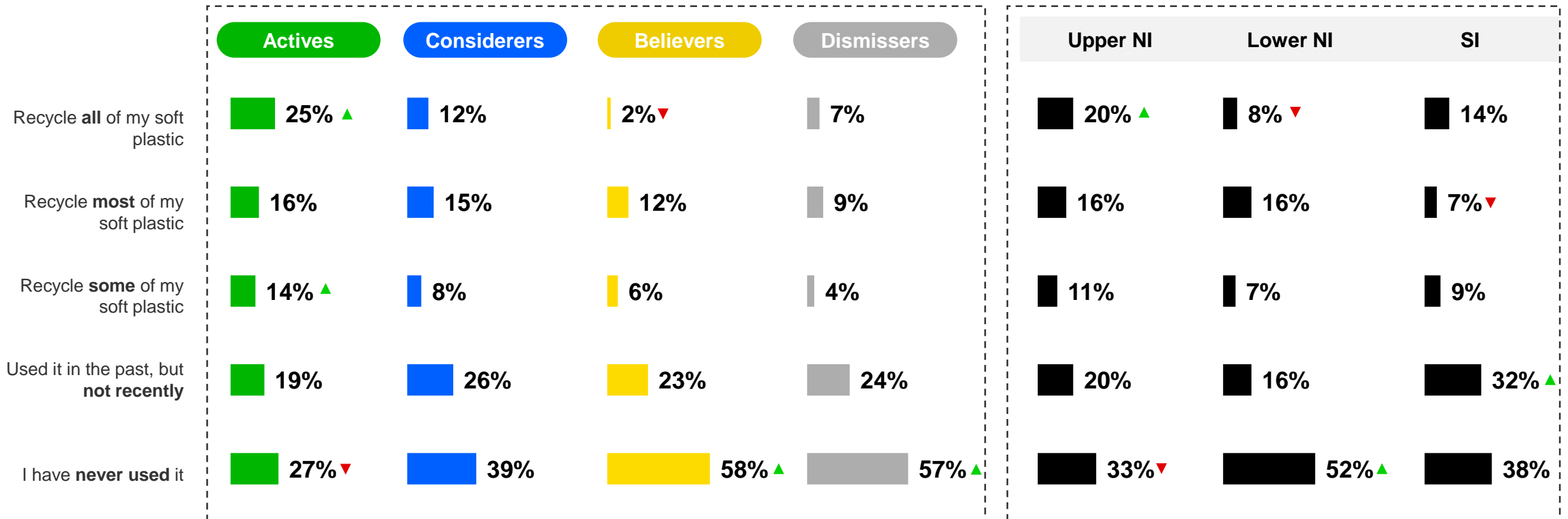


Usage of the Soft Plastic Recycling programme



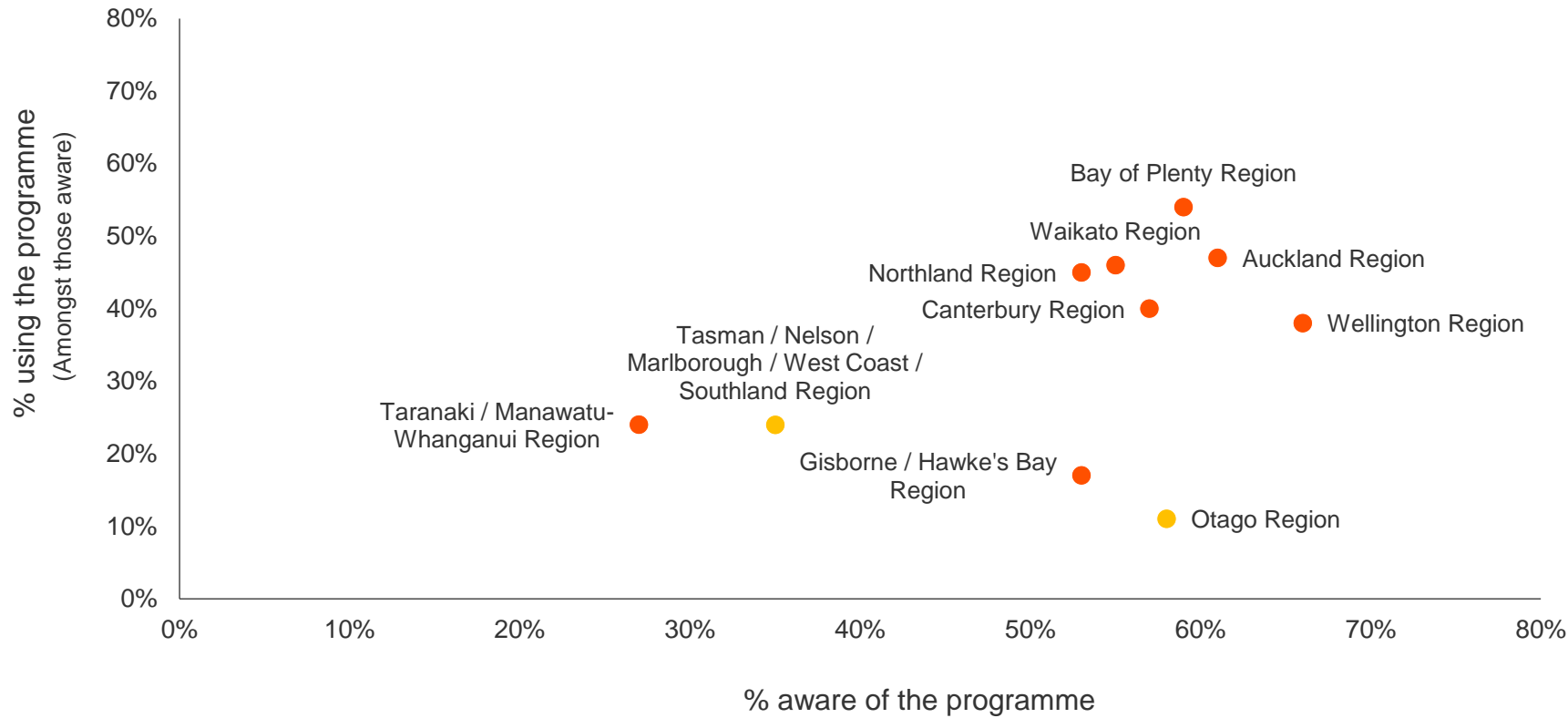
Clear differences in usage across the Eco-segments. Regionally, non-users are higher in the lower North Island (potentially less accessibility), while putting the programme on hold in Otago means we have lost participation in the South Island

Usage of the Soft Plastic Recycling programme

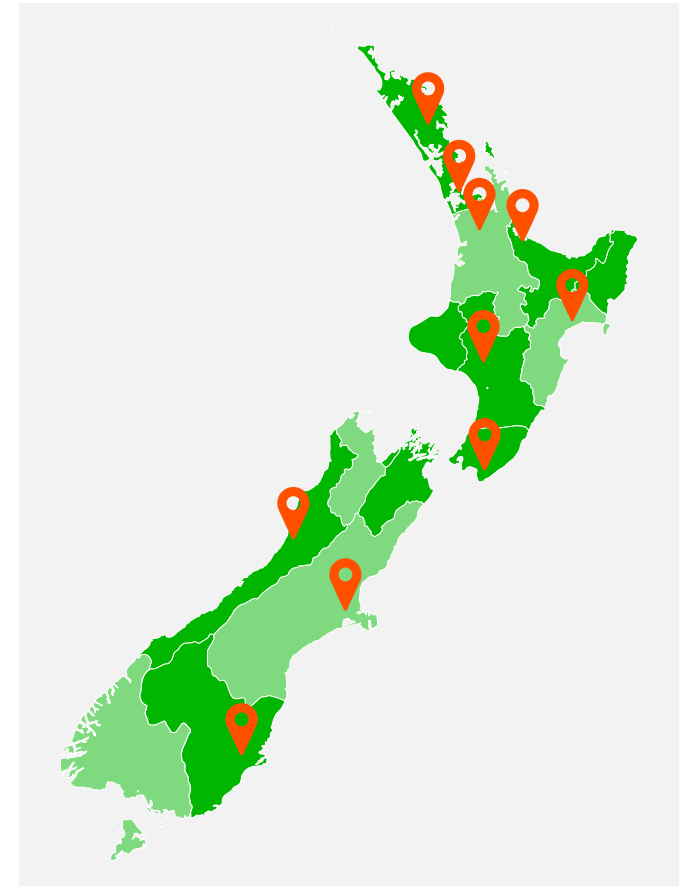


Usage of the scheme is correlated with awareness – outliers include Otago (where the programme is currently on hold), while the East Coast has awareness and accessibility to the programme but low usage

Soft Plastics Recycling programme awareness vs engagement



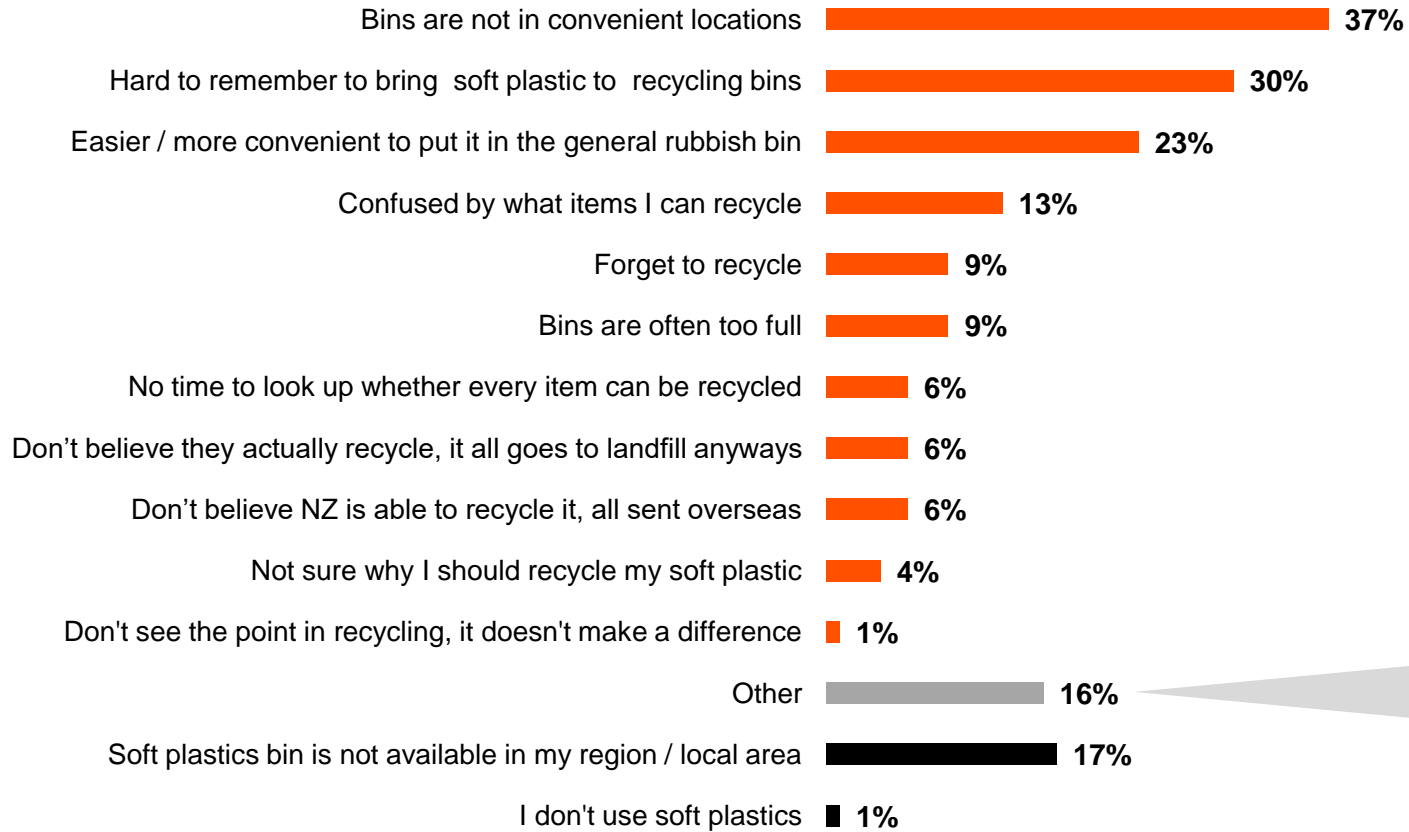
Collection locations



■ Has soft plastic collection point currently in the region

Practical barriers are key, with half not having easy / any access to collection locations while the extra effort required and confusion about the scheme are also limiting participation

Reasons why people are not using the Soft Plastic Recycling Programme



OTHER REASONS:

I find soft plastic e.g. glad wrap and bread bag, confusing as to recycling.

I saw a supermarket employee put the big bag of soft plastics straight into the landfill skip.

Haven't had the need to at this stage as I keep my recycled plastics at home until I need to re-use them .

In Australia you get paid to recycle if that is introduced here it would definitely make a difference.

Can't be bothered.

The thought of taking my rubbish to the supermarket to recycle is embarrassing to me.

Carbon emissions in taking these to location would exceed benefit.



The soft plastic bin nearest to me is bursting at the seams. This tells me the **interest in this is high but the systems in place are not fully up to speed with the community's interest in this action.** (Suburban, Bay of Plenty Region)

There needs to be **more soft plastic collection points.** More focus on companies that are using recyclable packaging. (Suburban, Bay of Plenty Region)

I would love to see soft plastics more easily recycled in my area. (Suburban, Manawatu-Whanganui Region)

More needs to be done regarding soft plastics recycling/reuse. (Suburban, Manawatu-Whanganui Region)

Soft plastic is harder to recycle since you need to find a place / centre that collects it. Thus, it **almost always end at the general waste bin.** (Suburban, Wellington Region)

The only plastic recycling I am not doing is the soft plastics - this is because **I don't have access to a bin** that I can recycle this into. If there was an option for this soft plastic and also for food waste, I would be close to 0% going to land fill. (Suburban, Auckland Region)

Soft plastic recycling is **not accessible.** So we often can't recycle despite wanting to. (Suburban, Waikato Region)

I only read about it on a bread bag, and I have **never seen any of the recycling bins.** (Suburban, Tasman Region)

They keep changing recycling locations, often closing down more than they open up, **recycling should be getting easier, not harder.** (Urban, Wellington Region)

There is **no longer anywhere to recycle soft plastics** which is why we don't anymore, anyway who wouldn't want to recycle? It's free instead of paying to use the rubbish bin. (Suburban, Auckland Region)



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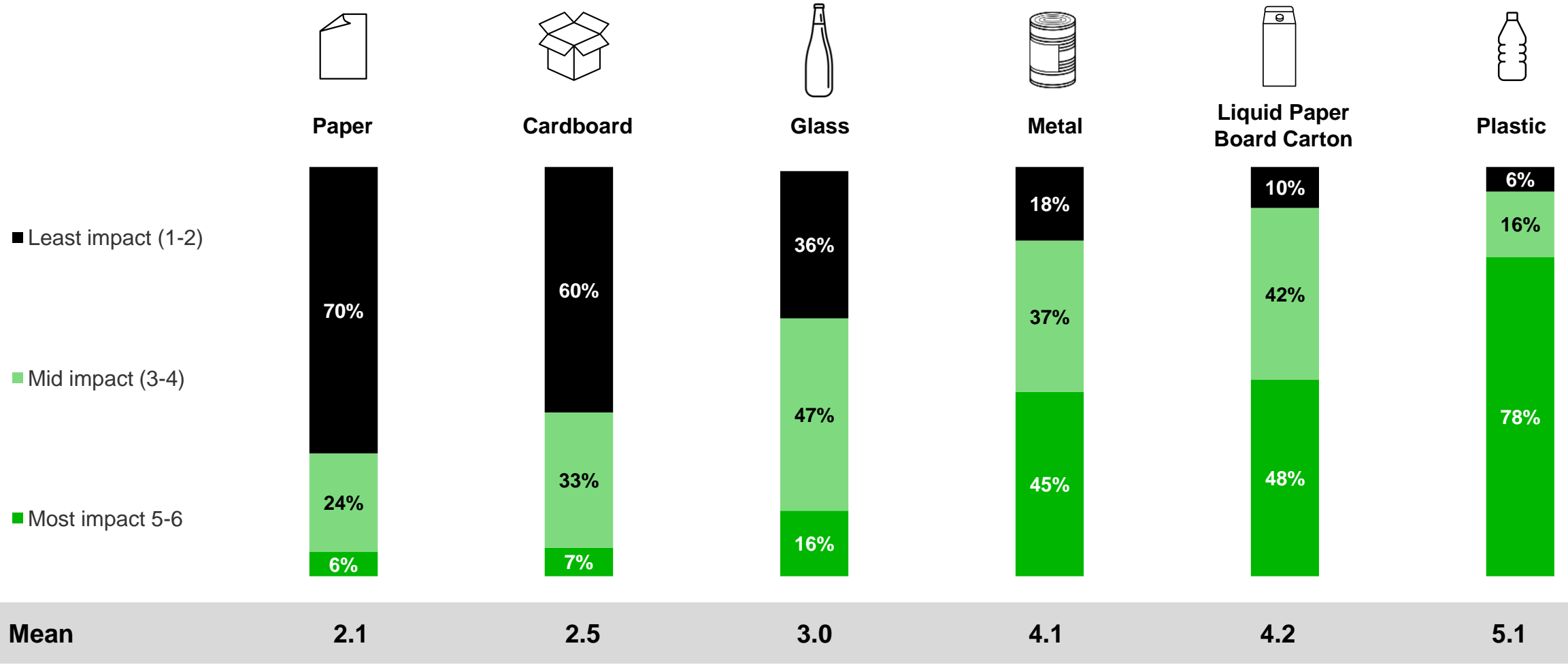
03

Perceived
Knowledge &
Understanding



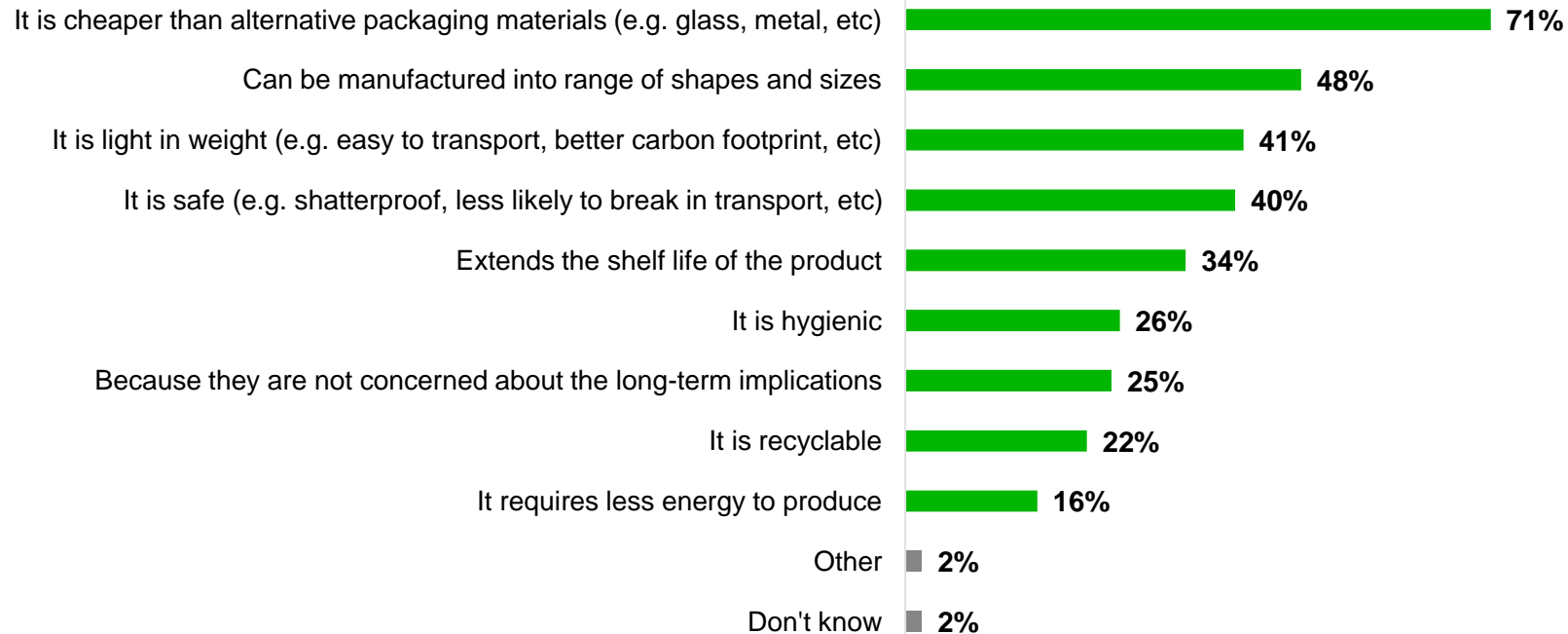
Over three quarters of consumers believe that plastic has the most impact on the environment, despite this not being the case (likely due to the governmental focus of reducing plastic)

Packaging materials impact on the environment



Consumers believe the main reason for plastic usage is that it is cheaper for manufacturers than alternative packaging options, along with functional benefits

Why manufacturers use plastic



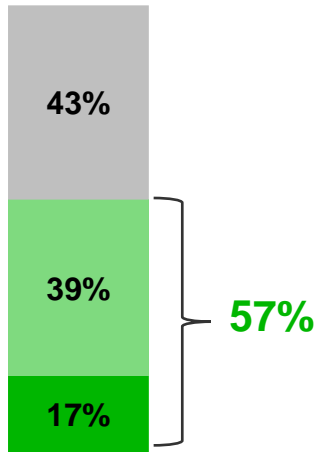
Change is hard, when plastic was the desired product, companies adapted to a cheaper product and now it's harder to adapt processes and accept lower margins. (EcoConsiderer)



Consumers are most unfamiliar with what happens to soft plastic recycling; the outcome of even regular kerbside recycling is not well understood

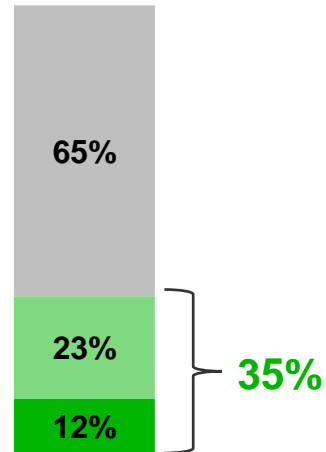
Familiarity with what happens to plastic after collection

Plastic packaging collected by Councils



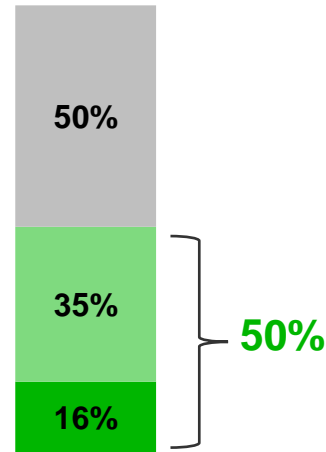
■ A pretty good idea

Soft plastic packaging collection

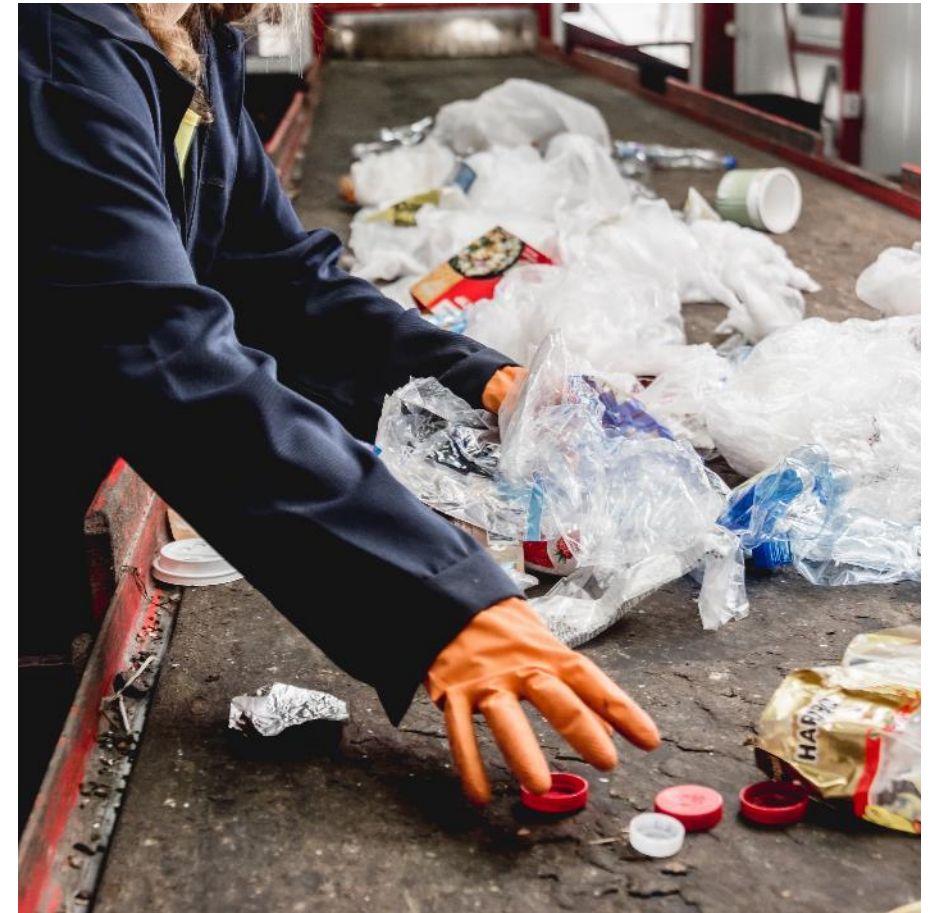


■ I have a basic understanding

Plastic packaging from public recycling

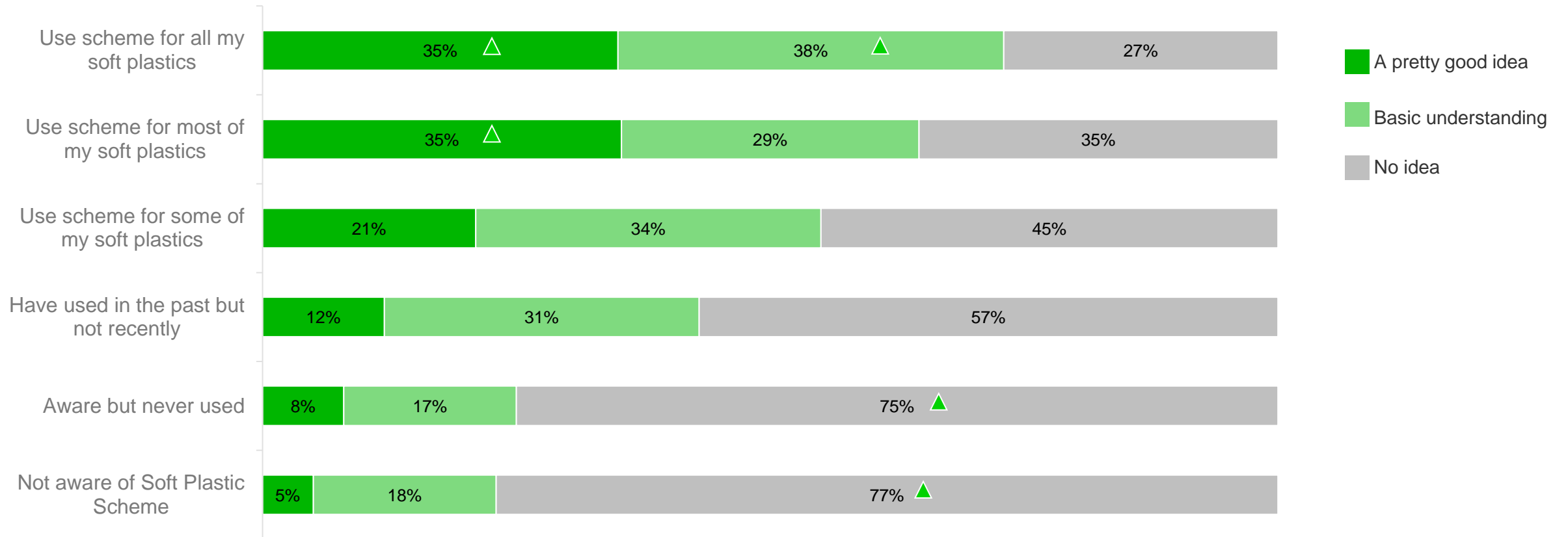


■ No idea



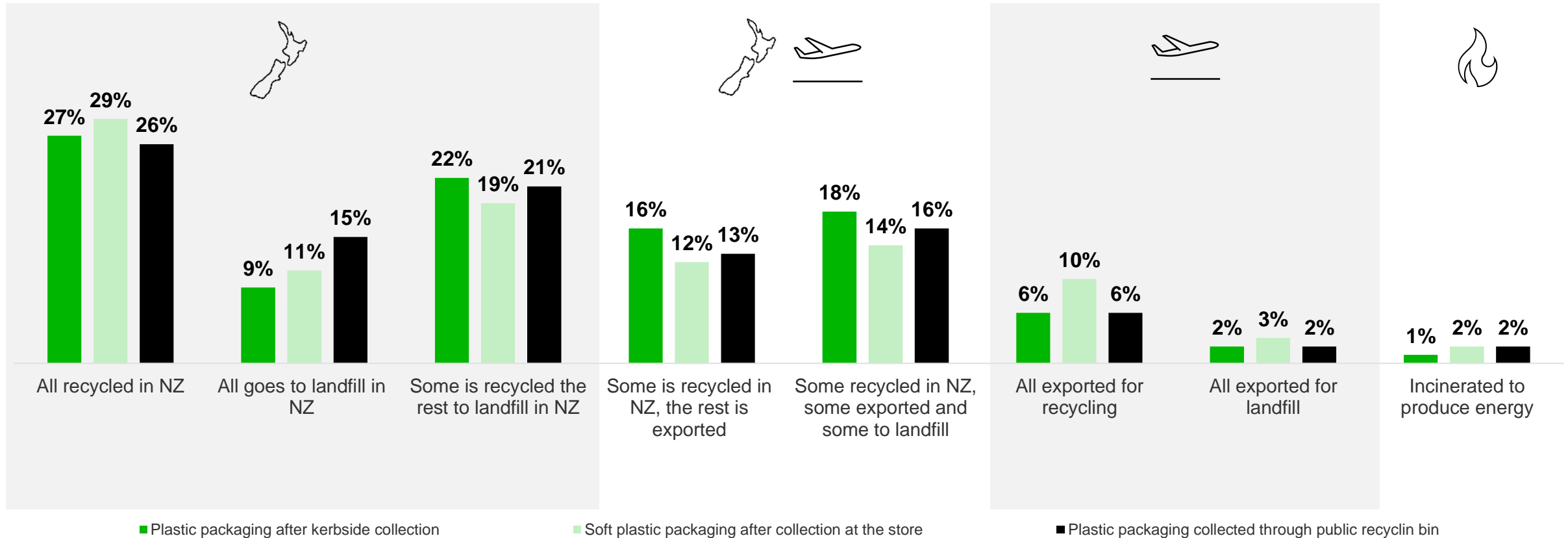
Awareness of what happens with soft plastic packaging after collection is much higher amongst those who are current users of the scheme

Familiarity with what happens to soft plastic packaging after collection



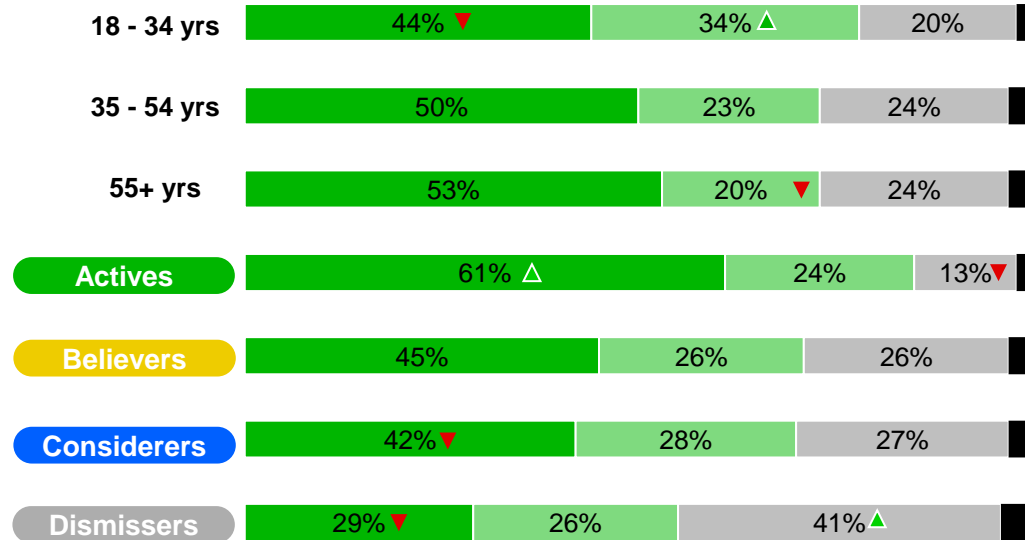
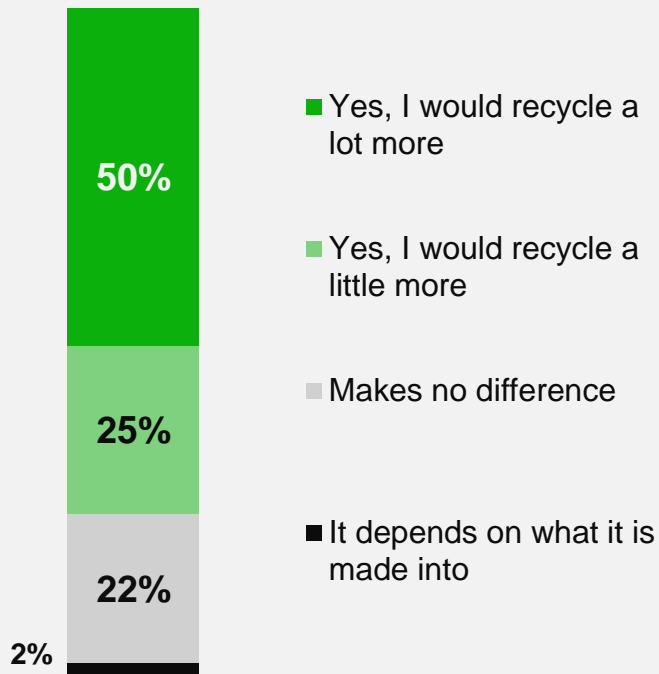
Majority of consumers believe all or majority of plastic and soft plastic packaging is recycled in NZ, with some going to landfill in NZ

Knowledge of what happens to plastic recycling after collection



Half of New Zealanders believe they would recycle a lot more if they knew / trusted the outcomes of recycling; less compelling for younger ages and the less engaged segments

Trust and knowledge in recycling



Providing information to the general public about the recycling scheme and **what happens to it after drop off** (and, critically, why it is important we recycle) will **encourage more people to recycle**. (18-24, Male, EcoBeliever)

It would be good if we could **find out more about what happens to plastics and glass after they're recycled**. (45-54, Male, EcoActive)



*I **don't trust** Marlborough depot are actually recycling what we put in our bins. (25-34, Male, EcoActive)*

***Very concerned** by Fair Go TV article stating so much **recycling goes to landfill**. I continue to recycle and **HOPE** it actually is recycled. (55-64, Female, EcoActive)*

*I recycle consistently however globally the major polluters don't, so **sometimes I wonder why I bother**. (45-54, Male, Eco Considerer)*

*I know Auckland **DOES NOT** recycle its recycle bin waste - **it all goes in the landfill**. (65+, Female, EcoActive)*

*I try to recycle as much as possible. Sometimes containers are contaminated and can't be recycled. I do not want our recycling to go to third world countries to be sorted. **It's hard to ignore what people say about sending recycling to landfill** when they send contaminated recycling and it all has to dumped. (65+, Female, EcoBeliever)*

*We chuck it all in the recycle bin, Auckland CC has stated that **it all goes to the tip anyway**. (65+, Male, EcoConsiderer)*

All these packets have been proven to not be recycled in Auckland - it all goes to the TIP because a lot of it is not recyclable. (65+, Female, EcoActive)





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04

Recycling Material Terminology

Unprompted, consumers commonly described these images as 'soft plastics', but also high mentions of being non-recyclable

How would you describe these materials?



However, some confusion in perceived recyclability between left and right soft plastics images, suggesting further education or clarity is needed on different soft plastic materials



Left photo, soft clean plastic we can take to a soft plastics recycling bin, ours is at New World. The left one is plastic - disaster to the environment, the right one is not much better

Left photo, soft clean plastic we can take to a soft plastics recycling bin, ours is at New World.

Soft plastic on left. All looks recyclable

Left image is recyclable, right image is not

But as to the left I am unsure ... these items pictured are the most confusing items to decide on

Left photo soft plastic only recyclable at supermarket drop off container



Right photo, packaging contaminated with food, can't be recycled

I would put the right one in the actual rubbish

Right photo, packaging contaminated with food, can't be recycled

Rubbish on right. Some maybe recyclable

Right photo rubbish has to go in rubbish tin as not recyclable

These are tricky, I think most of the items in the right photo are recyclable

Depending on plastics, right side items may not be able to be recycled.

When prompted, 'Soft plastic packaging' is the most common consumer description for this material

“

Soft plastic, able to be crunched. Can't be recycled at home, can be at the supermarket.

These will need to be taken to the special recycling stations located at some supermarkets.

Can be recycled at soft plastic drop off points.

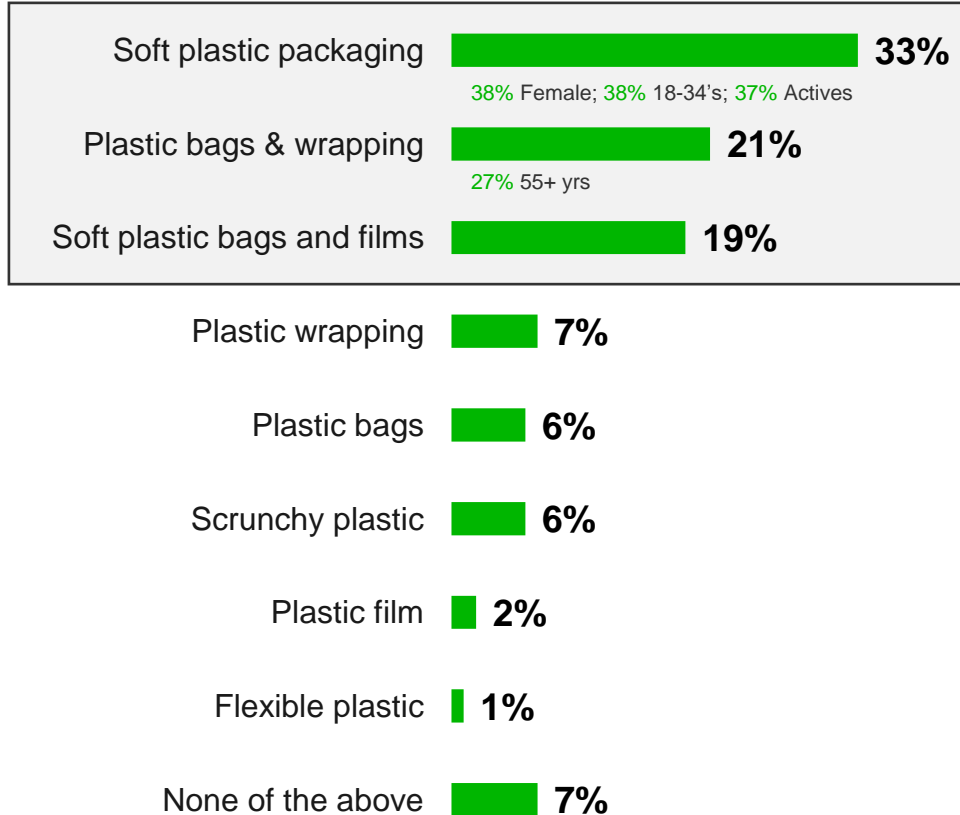
Bread bags vs other plastic bags.

This is mostly soft plastics. Can be recycled.

Plastic bags.

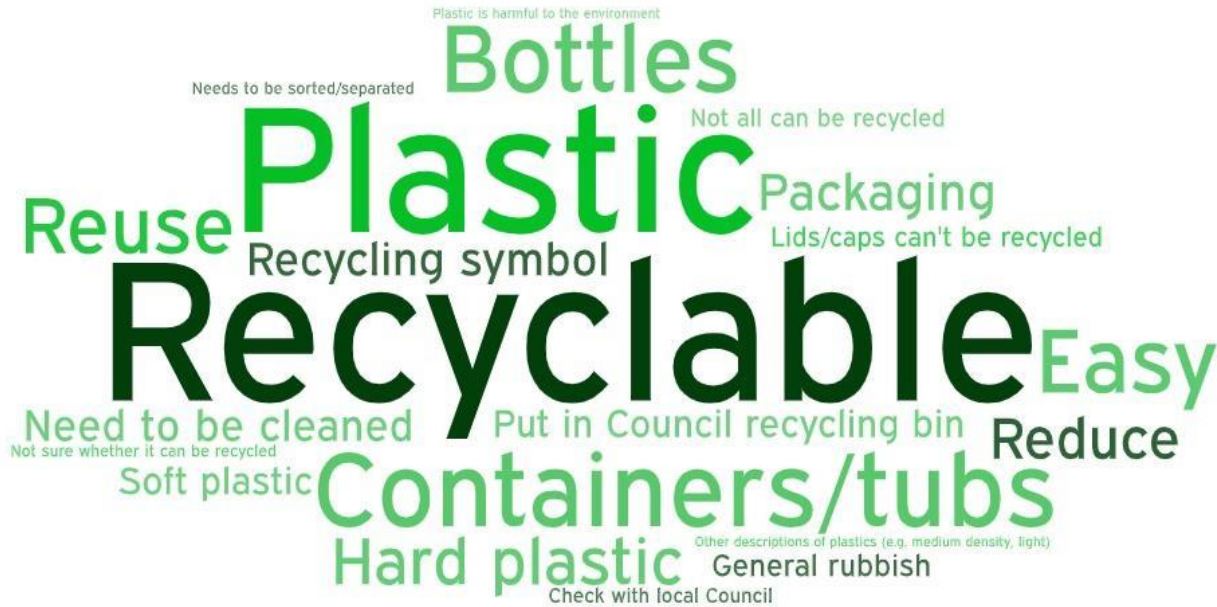
These items are made of soft plastic which cannot go in the recycling bin. You have to take it somewhere that accepts soft plastic.

Soft plastic packaging



Unprompted, consumers used a short-cut description of 'Recyclable plastics', or simply 'plastics'

How would you describe these materials?



‘Plastic containers’ is the most common term selected when prompted, although ‘mixed plastics’ is also used, particularly amongst older consumers



Plastic containers

Plastics. Need to remove lids, rinse and put in your yellow council recycling bin

Hard plastic 100% recyclable

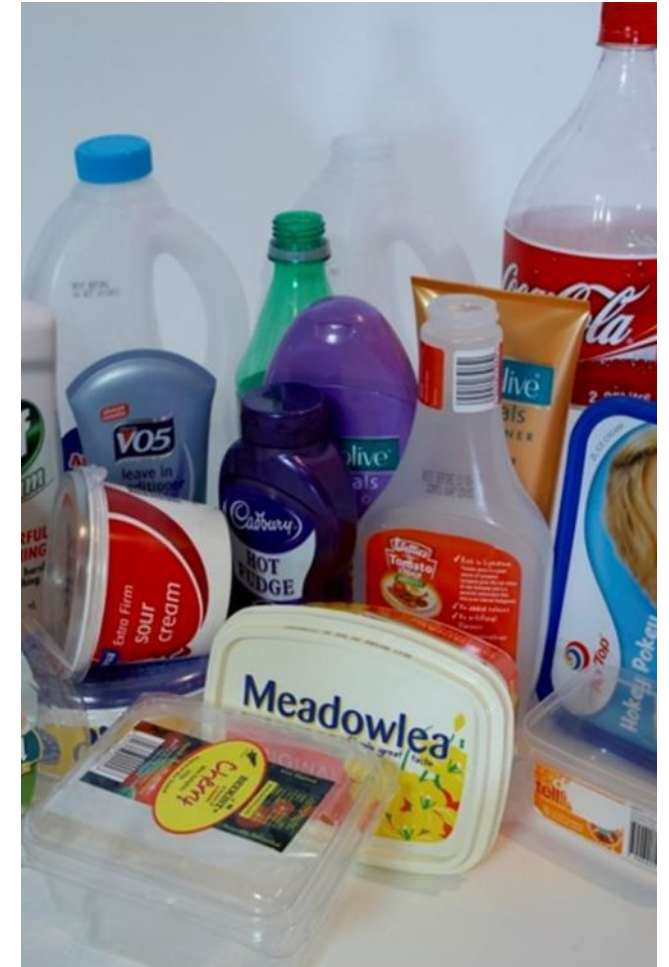
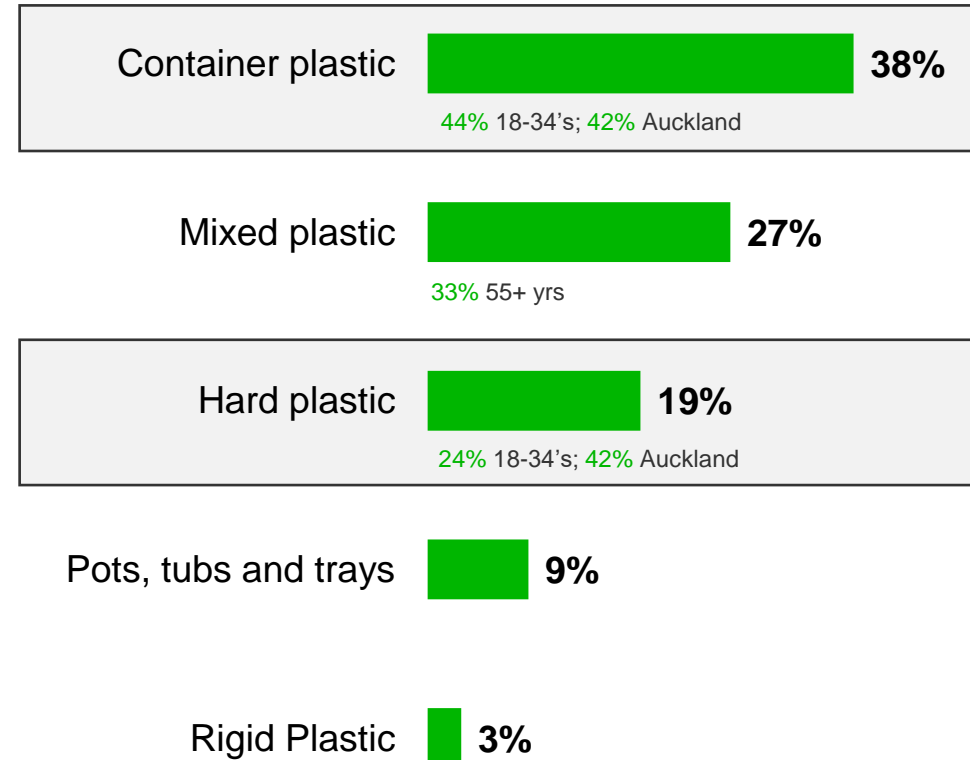
Hard plastic food and liquid containers

Plastic bottles and containers

Plastic bottles and containers can be recycled. Check the underside for confirmation

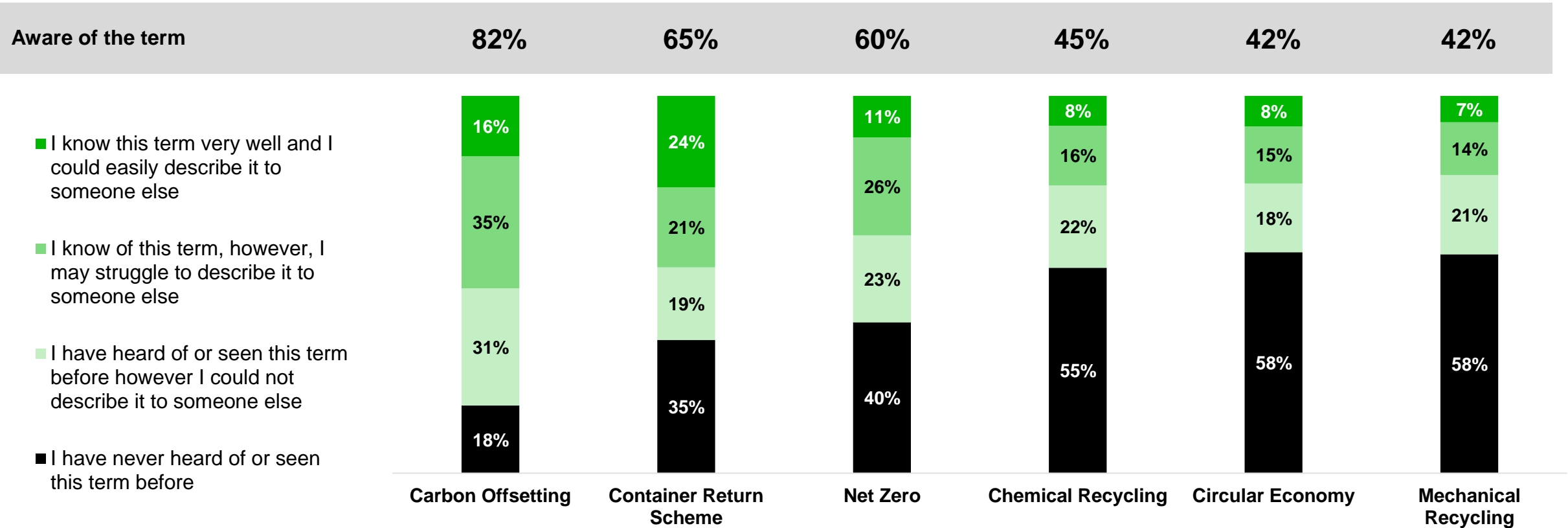
Recyclable containers

Hard plastic, Easy to clean to put in recycle bin



While Carbon Offsetting, Container Return Scheme and Net Zero are reasonably well-recognised terms, most would struggle to easily describe any of these concepts

Awareness of sustainability and recycling terminology



We asked them to explain these terms, most were able to explain these reasonably well....



Net Zero

"It's a climate change response act which sets a target on what green house emissions are allowed"

"The carbon emitted into the atmosphere from production of a product when compared to the carbon used by carbon consumers e.g.: trees, is equal."

"Net Zero would mean that carbon emissions were zero across the lifetime of a product or service, either because they didn't produce any carbon or were captured, stored or offset."

"Governmental vision/goal for NZ to reach a point where carbon emissions are net zero i.e. for any carbon emissions created are reduced as much as possible and then off set by carbon absorption like planting trees"



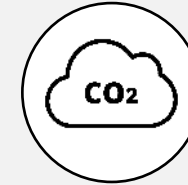
Container return scheme

"You return a used glass bottle for example, to a collection point and get a credit or refund on the bottle"

"A refund or credit is given on the return of this container to the retailer. The cost of these refunds are generally covered at times of initial purchase, or by the manufacturer. Returned items are then reused or recycled."

"Something like a plastic fizzy drink bottle has a sign on bottle saying money back upon return. You take it to a machine or a retailer that takes part and you get a small amount of money given to you for returning item."

"You pay a slight charge when you purchase your certain grocery items which you receive back when you recycle your containers ."



Carbon offsetting

"It is when a company buys carbon credit to make up for greenhouse gas it has emitted"

"When you take one action to reduce carbon of another activity."

"By actively giving or doing something to offset (balance out) the carbon you have just created or contributed to."

"The attempt to balance carbon emissions through actions that would ideally neutralise the effects"

It is the idea that when the carbon emission known of a certain activity or item of use e.g. an aeroplane flight. Then you can purchase a carbon offset that will ensure that enough trees or sustainable activities occur through that financial offset to counter balance that carbon produces from that thing."

However, these elements were less easily described



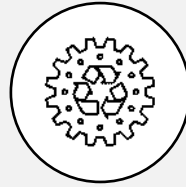
Circular economy

“That things that I don't need anymore goes back to somebody that needs it or makes it into something else”

“An economy where items produced are made once and through consistent maintenance of the original item it lasts a lot longer instead of ending up being sent to landfill”

“The idea of moving away from a linear system that is take, make, waste to a circular system that encourages products to be reused and be regenerative. The idea that a product should have a full lifecycle and not just be thrown in a landfill. Take, make and regenerate”

“The idea that the economy is a cycle, all the different aspects, consumers, producers, government, etc are all connected and there are always flow on implications of actions “



Mechanical recycling

“Broken down by a machine.”

“In mechanical recycling, plastic waste (sorted by material type) is milled and washed, passes a flotation separation, and is dried. The plastic flakes are then either used directly to produce new plastic materials or they are processed into granulates beforehand.”

“Turning plastic into something else”

“The material is ground up and then bound together to make a new product e.g. plastic seating”

“End of life goods are disassembled into new raw materials for manufacturing.”

“The material is ground up and then bound together to make a new product eg plastic seating”



Chemical recycling

“Using chemicals to break down plastics”

“Process of converting polymeric waste by changing the chemical structure and turning it back into substances that can be used as new materials”

“Put it in certain chemicals and then get raw material to make new product”

“Recycling of chemicals that are not biodegradable or harmful to environment”

“Melting the plastic”

“The use of heat/ chemicals to break down old plastics into new one ones I think.”

“Oil and other chemicals cannot be disposed off as other liquids and need to be done properly.”

05

Sources of Information



COLOURS AND FLAVOURS • VEGETARIAN
Milk, Cream (29%), Sugar, Australian Roasted **Macadamia**
Nuts, Salt, Water, Skimmed **Milk** Powder,
Free Range **Egg** Yolk, Vegetable Gums (412, 410,
1300).

Contains minimum 13% milk fat.
WARNING: CONTAINS EGG, MILK AND TREE NUTS
MAY CONTAIN CEREALS CONTAINING
OTHER TREE NUTS AND PEANUTS.

PER 100g

Quantity Per serving	Quantity Per 100g
1110kJ (266Cal)	1110kJ (266Cal)
2.8g	4.0g
13.6g	19.4g
6.7g	9.6g
13.4g	19.1g
13.1g	18.7g
LESS THAN 1g	LESS THAN 1g
54mg	77mg

INFORMATION
Made in Australia from Australian and imported ingredients
Coles Local and the cl. logo are trade marks of Coles Supermarkets Australia Pty Ltd. 800 Toorak Road, Hawthorn East, Vic 3123. Call 1800 061 562 www.coles.com.au

STORAGE
Keep Frozen. Store at or below minus 18°C.



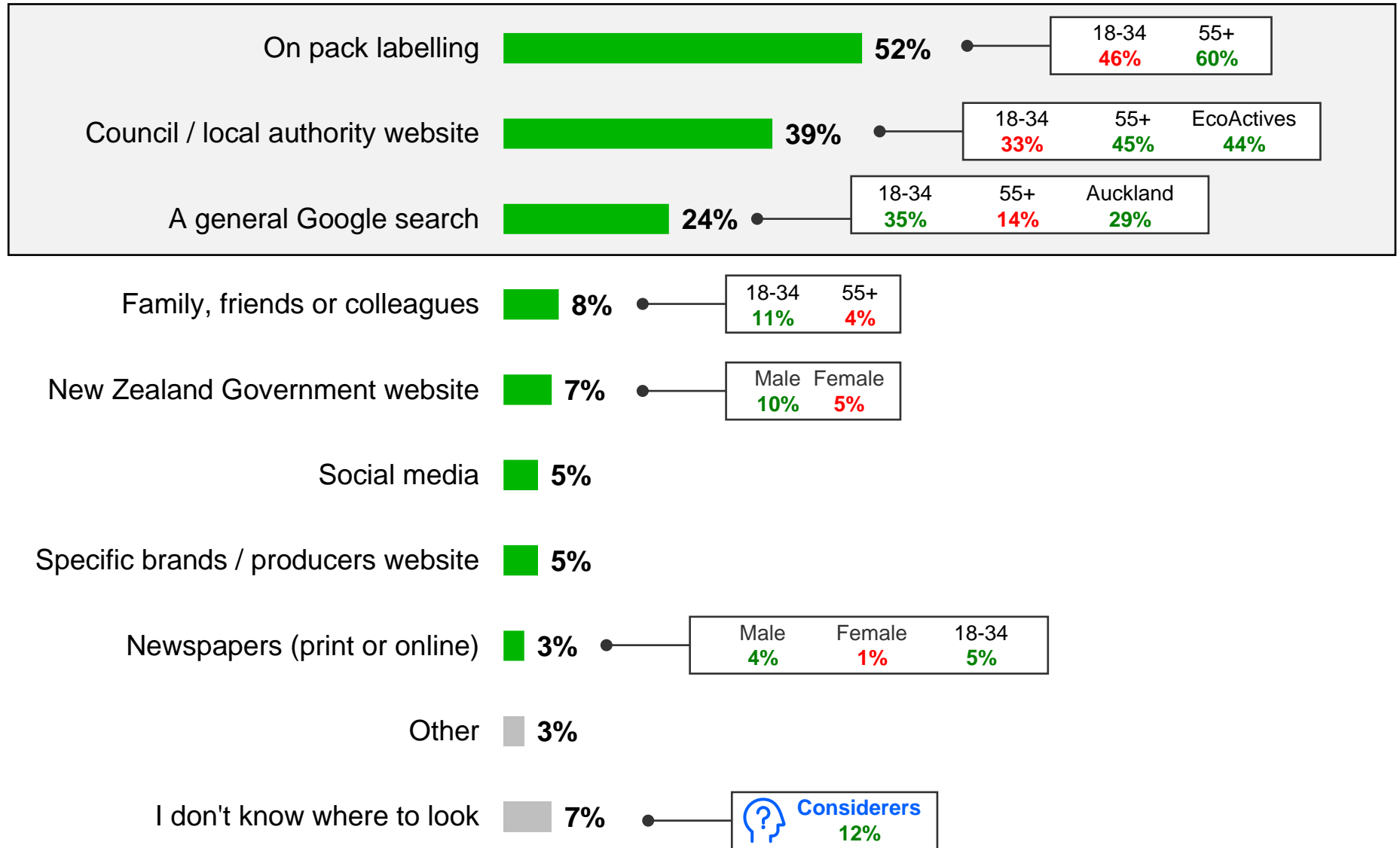
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Source of information

When looking for information on whether a plastic item can be recycled consumers are largely turning to on-pack labelling followed by local council websites and then a general Google search.

The younger generation are more likely to get their information from a general Google search or family/friends.

EcoConsiderers who are on the fence about making eco-choices, are significantly more likely to say they don't know where to look.





*It would be good if there was more info in a **digestible format** on what plastics can be recycled and where. (25-34, Female, EcoConsiderer)*

*There is a lack of **publicly available** information on recycling. It is accessible but would be good if it was public knowledge. (18-24, Male, EcoDismitter)*

*It is especially important to recycle and that I would really like to do more if I could be **educated a little bit more** of how I could do that more effectively, so it becomes second nature/ instinctive. I would like to think that my kids and future generation of kids could live in a cleaner and more sustainable world. (45-54, Female, EcoActive)*

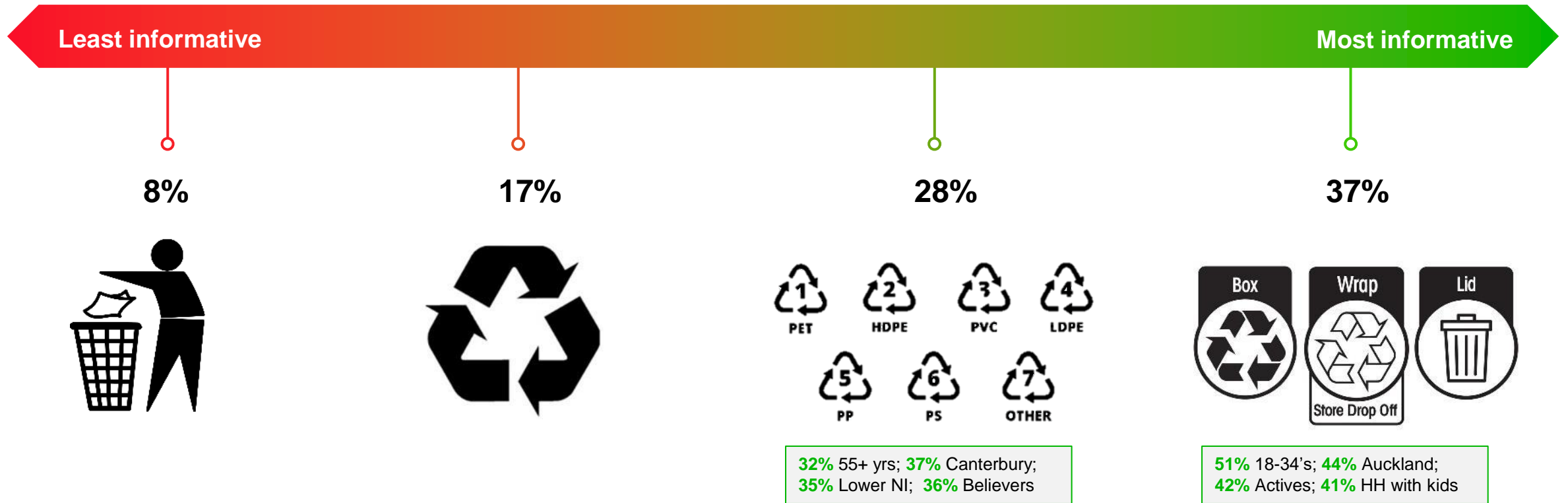
*More information to **older citizens**. More encouragement to younger persons. (65+, Female, EcoBeliever)*

*Perhaps there could be some **free training** provided to improve the outcomes. (65+, Male, EcoConsiderer)*

*I think that **more education regarding recycling** is very important. I struggled to know some of the terms in this survey and needed to look them up on Google. That means that most people do not have a clue what happens after the kerbside pickup of their recycling. (65+, Female, EcoActive)*



Consumers find the detailed (ARL) label the most informative on-pack information, reflecting the biggest barrier in recycling - being unsure which mixed parts of an item can be recycled



“

*It is quite troublesome to recycle plastic here. You have to **check** whether the **number** is **1,2 and 5** only. (Wellington Region)*

*We all need to recycle more but it needs to be made easier to identify what can be and should be recycled. **Numbering system works well** for me but we don't currently recycle all numbers as some items I believe go to the tip. NZ needs to have the infrastructure to recycle more. (Wellington region)*

*I love recycling but it needs to be **easier to understand** i.e. same things recycled everywhere in NZ, the recycling numbers to be larger / or in a contrast colour. (Canterbury Region)*

*Recycling is so confusing, what you can or can't recycle. People with **poorer eyesight** can't read the labels or they aren't easily understood. (Northland Region)*

*It should be **easily recognisable** as a recycled product to sighted and blind people. (Wellington Region)*



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06

Container Return Scheme



The Container Return Scheme was introduced to survey participants:

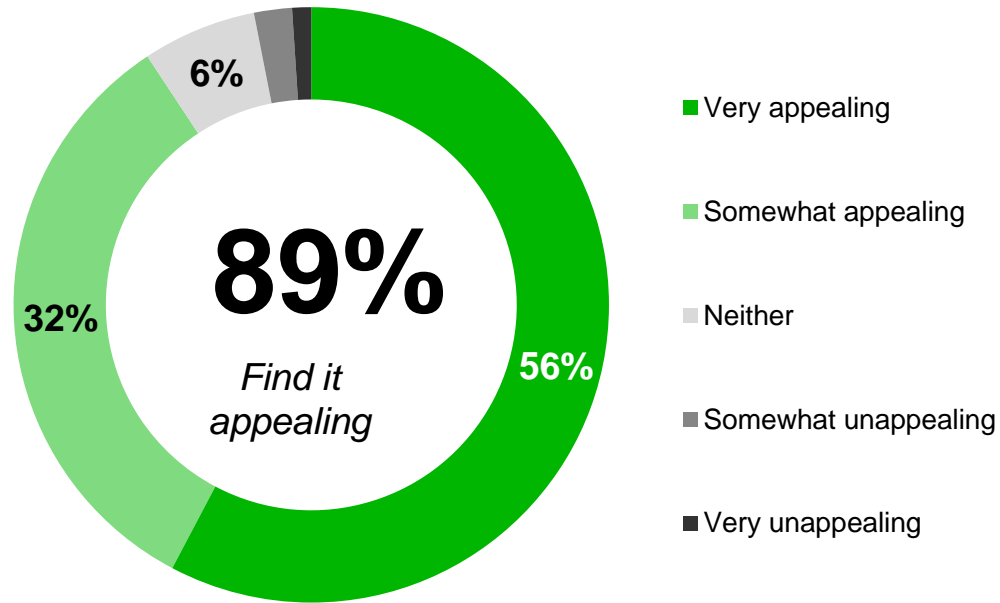
In countries overseas (like Australia) they have what is called a **container return scheme**

Container return schemes encourage consumers and businesses to return beverage containers (e.g. bottles, cans etc.) for recycling and/or re-use. They do this by **including a refundable deposit (e.g. 20 cents) in the price of purchase**

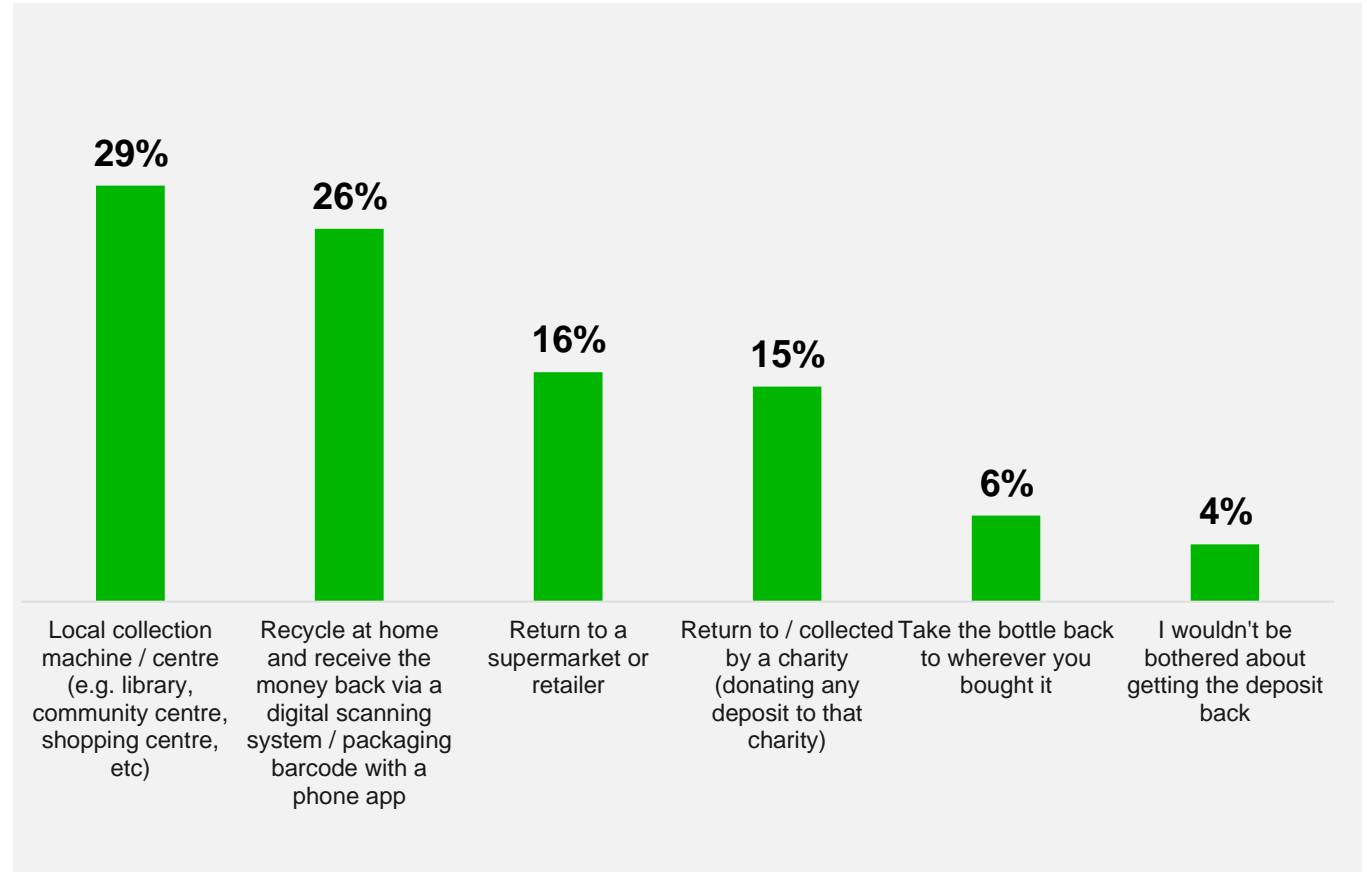


A container return scheme is very appealing to New Zealand consumers, with a local community collection or home-based digital claiming system the most preferred

Appeal of Container Return Scheme



Preference for return location



Even before prompting with a description of the Container Return Scheme, most of those aware of the scheme understood there is an upfront cost



Understanding of a cost involved with a Container Return Scheme

You purchase at an increased price then return it to the point/ company which it came from for \$

You pay a slight charge when you purchase your certain grocery items which you receive back when you recycle your containers .

When you purchase a product your first purchase includes a surcharge for "rental" of the container. When you purchase a new product you return your container and get a new one back for a reduced price.

Pay an amount for the container and when you return your container for recycling you get your money back

The selling price of the item includes a "deposit" which is refunded when the empty container is returned.

You pay a small fee when you buy items in certain containers (as part of purchase price). When you return the container to a specified location you receive a small sum of money back

You pay extra eg 10c for the item and get a refund if you return of empty container

You buy a product in the container. You pay a small fee for the container. You can return the container to the store and have it filled. This time you only pay for the product.





We need this system in NZ NOW. (55-64, Female, EcoConsiderer)

The sooner the bottle refund scheme comes to New Zealand the better. Have done it in Australia. It was fun and people were using it. (Female, EcoActive)

Some of us made our first money by bottle returns, 50yrs ago I would bike around town looking for beer bottles, got 1 cent for each one. Will be good if this comes in for plastic bottles too. (55-64, Male, EcoBeliever)

A system like they have in Brisbane for cans and bottles etc would work well, as its makes the consumer responsible and gives them incentive to return the empty cans etc. (55-64, Male, EcoBeliever)

The get paid to recycle is a great initiative. It's a shame it has never been introduced in NZ. Australia has it and it has encouraged my nephew from as young as 2 to start recycling. (25-54, Male, EcoConsiderer)

Big believer in deposit refund when returned to store or collection point as a good idea. (65+, Male, EcoActive)

I would like to have the option to donate my refund to a charity or keep it for myself, also love the idea of having drop off areas accessible to everyone, nearby supermarket, shopping centres, food malls etc. (45-54, Female, EcoConsiderer)



Final general comments around recycling



*I think a really big push should be made on **recycling/retaining plastic** to prevent it reaching our oceans. (65+, Male, EcoActive)*

*Recycling is getting bad because we are **not doing our duty** to help with the environment by not recycling correctly, that is put just what needs to be recycled in bins provided. (65+, Female, EcoActive)*

*New Zealand needs to recycle way more, and **invest in recycling plants in NZ** where we can make products in our country more, rather an importing or exporting. We also need **better initiatives to recycle**. (25-34, Female, EcoConsiderer)*

*We should also look to change our systems so that more people reuse and **companies create circular schemes** that can be used to stop producing so much waste into the environment. We **need action now** to secure a sustainable future for the next generations. (18-24, Female, EcoActive)*

*It seems like we have such a **complicated concept district to district**. So NZ should increase its capacity to recycle more and have a standard system across the country. The young are really good at taking responsibilities for the earth once they know why and how, so the process of recycling should be made more aware and what the products get turned into could be encouraging for people to recycle. (35-44, Female, EcoActive)*

***Encouraging businesses to use alternatives to plastic** is a lot more important than reducing carbon emissions. I don't believe carbon emissions are a problem but plastic rubbish definitely is. If the government and council really cared about the environment they would do something about plastic rather than carbon emissions, which makes me think they have a hidden agenda... (18-24, Male, EcoBeliever)*

*More needs to be done to **incentivise recycling**. There was a time when you could cash in on cans, glass bottles. There was a time when instead of buying "alcoholic" bottles they had a swap-a-crate deal, or even a reuse gallon bottle deals. (65+, Female, EcoActive)*



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07

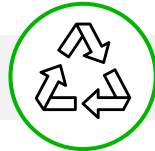
Final conclusions and
recommendations



Summary of key results

Understanding NZ consumers' behaviours, knowledge and attitudes around plastics recycling

Recycling Behaviours



Plastic bottles/containers are regularly recycled through kerbside recycling

The main barriers are mixed material parts and the impact of food residue. Confusion is also a key barrier e.g. plastic numbering system, along with the effort required, and some lack of trust in the system

Awareness of the Soft Plastics recycling scheme is reasonable, however usage is a lot lower reflecting the limited access and lack of convenience / extra effort required

On-pack labelling is a critical source of information for consumers (the ARL label is most informative), with councils recognised as a source of information as well

Knowledge / Beliefs



Plastics are believed to have the greatest negative impact on the environment – well ahead of metal and liquid paper board

Few have a clear idea of what happens to their plastics recycling (and even lower for soft plastics), although those using the scheme have a better understanding. The majority believe (hope) most of it is recycled in NZ with some going to landfill

'Carbon off-setting' and 'container return schemes' are reasonably well understood, and while they have heard of 'net zero' most would struggle to explain it

Response



Half of NZ'ers say they would recycle a lot more if they knew and trusted what happens with recycling

'Soft plastic packaging' and 'plastic containers' are the terms consumers most associate with different plastic types

The bottle return scheme is very appealing in principle – ideally through a local collection centre or able to recycle at home (with digital refund); further exploration of this topic is needed to understand how best to activate

Recommendations for the design of the Plastic Packaging Product Stewardship Scheme

Ultimately it will be about **engaging** consumers emotively and **empowering /enabling** them to make a difference, but functionally the scheme needs to deliver...

Consistency

Need for a fully national approach, to allow for clear communication of messaging and national activation

Clarity / Simplicity

Currently consumers are confused by all the different terminology, systems, labelling approaches etc

They need clarity on what can be recycled and where / how. On pack labelling is key to this

Ease / Convenience

We need to make the scheme part of their everyday lives, without the need for extra effort.

Kerbside recycling in main centres is an established behaviour, but if a separate scheme consider local collection centres in easily accessible and regularly visited locations e.g. supermarket carparks

Cost / Benefit

Aim for no extra cost to consumers – or even more compelling if there is an incentive/reward attached (beyond the altruistic motive)

Knowledge

Those who are interested, want to know more about what happens to the recycling after collection

e.g. how much actually gets recycled (and how it is used) and if we need to use overseas centres what are we doing to minimise this in the future

A range of different messages will be needed to target different consumer groups – need to test these for consumer appeal, relevance and persuasive ability



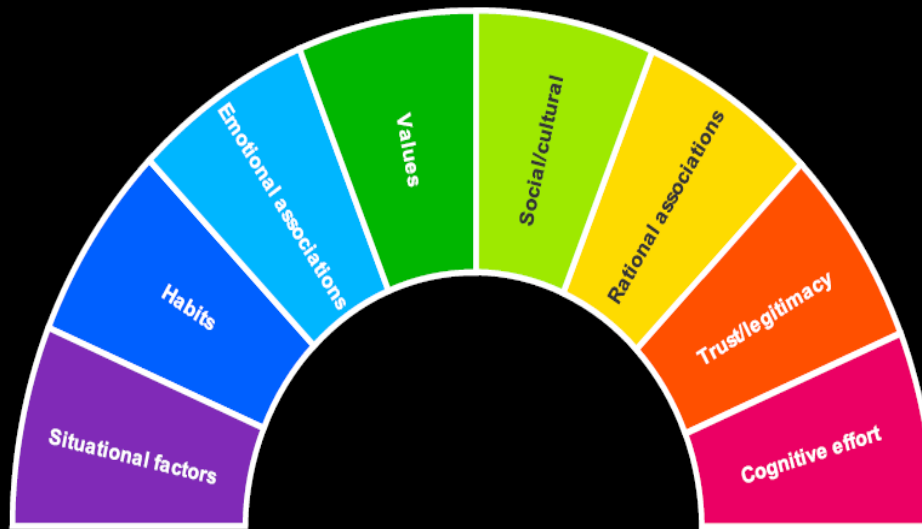
It is especially important to recycle and I would really like to do more - if I could be educated a little bit more about how I could do that more effectively, so it becomes second nature/instinctive.

I would like to think that my kids and future generation of kids could live in a cleaner and more sustainable world



Understanding the fuels and frictions of recycling behaviour can help us identify the key consumer messages to close the 'Value-Action' gap and overcome barriers

Introducing the Fuels and Frictions model

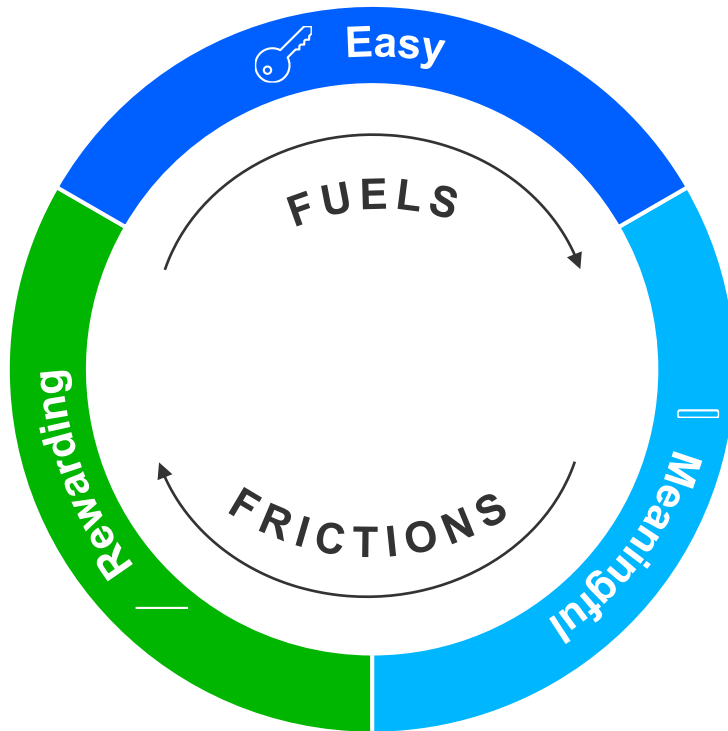


The Fuels and Frictions model summarises 8 factors, as identified in research and academic literature, that influence our behaviour.

Each of these factors can either be a 'fuel' (i.e. drive a behaviour) or a friction (i.e. stand in the way of behaviour).

By uncovering fuels and frictions to a specific behaviour we want to change, we can help create a frictionless experience to adopting new behaviours.

This knowledge will provide guidance on the three key criteria to help consumers to overcome these gaps



To become a new habit or ritual, make it...



Easy



Meaningful



Rewarding

Remove the FRICTIONS:

- Situational factors
- Effort
- Limiting beliefs
- Availability

Motivate to FUEL the change:

- Deliver a superior benefit
- Align to beliefs and values
- Socially desirable
- Build positive associations with the scheme

To cement the new behaviour:

- Deliver on the promise
- Reinforce the behaviour

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Thank you

MAY 2023



 **PLASTIC PACKAGING**
PRODUCT STEWARDSHIP



FOR FURTHER INFORMATION PLEASE CONTACT

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PO Box 6621, Victoria Street West Auckland 1142
Phone (09) 919 9200

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APPENDIX

Further information



Globally, we know there are some consistent observations that can be made on each segment



Actives

The Actives are much more likely to believe that they can **make a real difference** through their actions and think they are personally **affected by social and environmental issues**.

Their actions match their values, they want to do more, and they are willing to invest their time and money to support companies that try to do good like offsetting their impact



Considerers

Considerers **are on the fence about if they can make a difference** through their choices.

They have taken action to try to make a difference – they have stopped buying certain products/services because of their impact on the environment or society.



Believers

Believers are **heavily influenced by social factors**, thinking their choices show others who they are and what they believe in.

Similar to the Actives, this group **believe they can make a difference**.

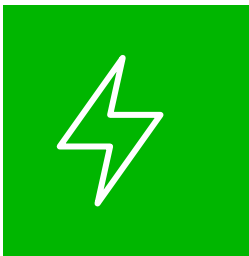
However, their **actions don't match their beliefs** – they aren't seeking out brands that offset their impact, and haven't stopped using brands because of their impact on the environment or society.



Dismissers

Dismissers are characterised by their **apathy to all things sustainable**.

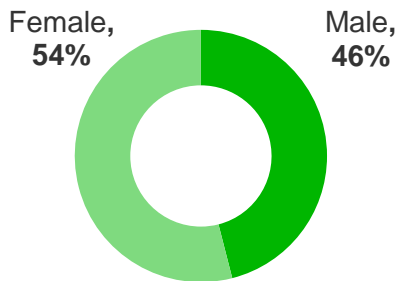
Whilst some Dismissers do engage on the basics, want to do more, and try to buy products packaged more sustainably, they aren't interested in investing their time or money to actually change their behaviours.



Getting to know your segments – ACTIVES

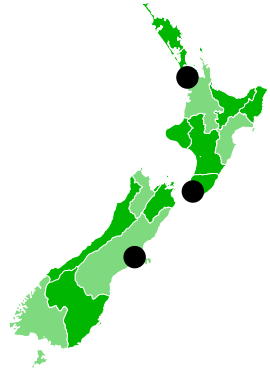
The Actives are **much more likely to believe that they can make a real difference** through their actions and think they are personally **affected by social and environmental issue**

GENDER

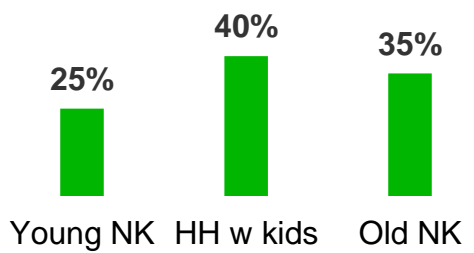


REGION

Auckland	36%
Wellington	11%
Canterbury	11%
Upper NI	57%
Lower NI	22%
SI	21%



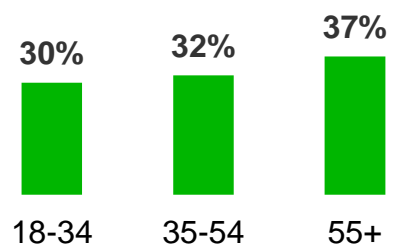
HOUSEHOLD



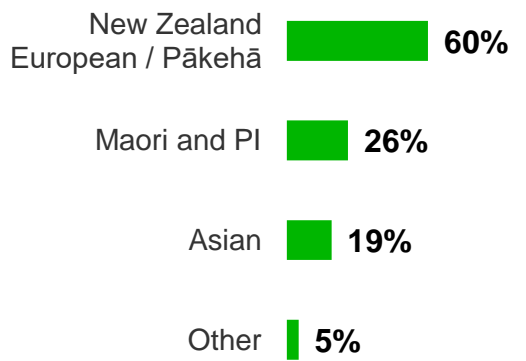
HOUSEHOLD SHOPPER



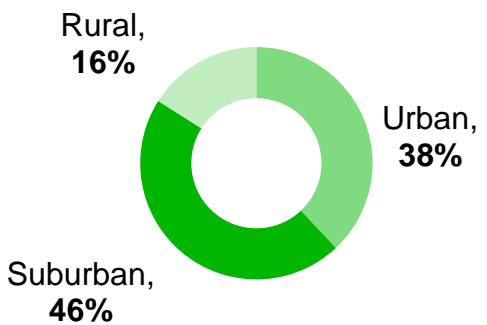
AGE



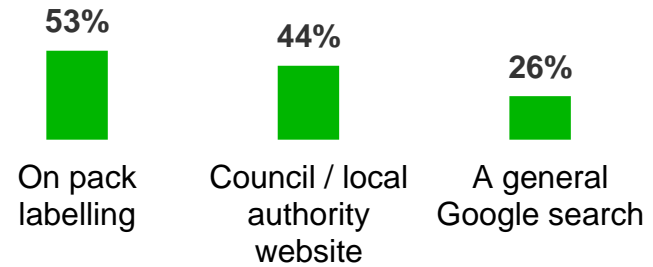
ETHNICITY



RURAILITY



WHERE THEY LOOK FOR PLASTIC RECYCLING INFO

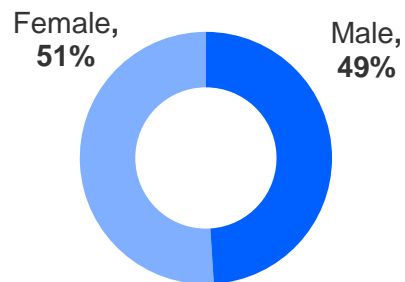




Getting to know your segments – CONSIDERERS

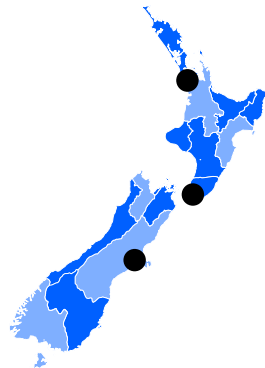
Considerers **are on the fence about if they can make a difference** through their choices

GENDER

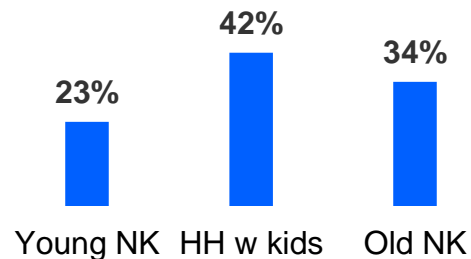


REGION

Auckland	32%
Wellington	10%
Canterbury	14%
Upper NI	49%
Lower NI	24%
SI	26%



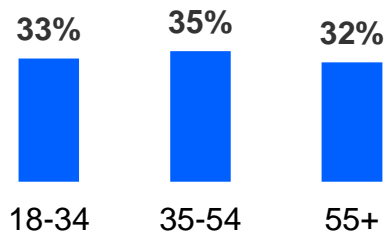
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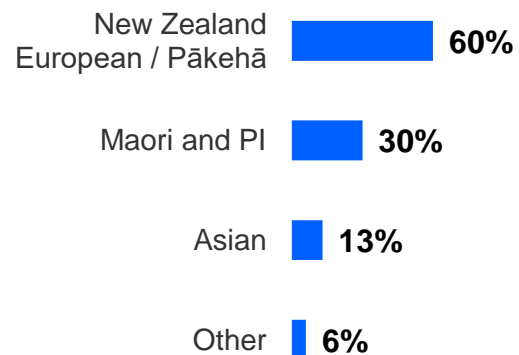
HOUSEHOLD SHOPPER



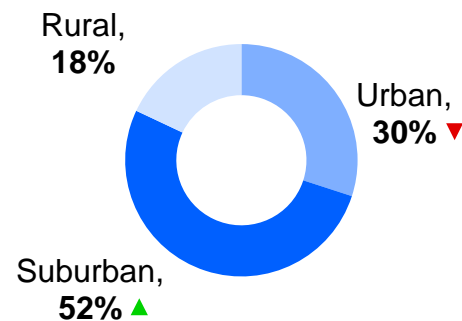
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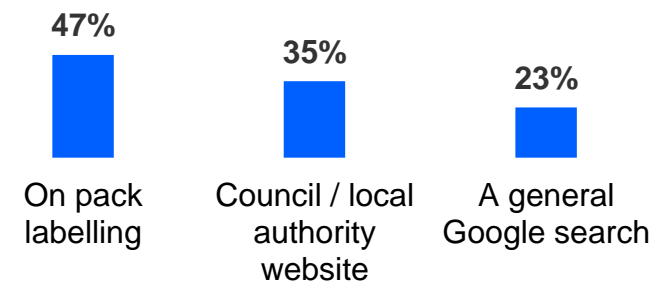
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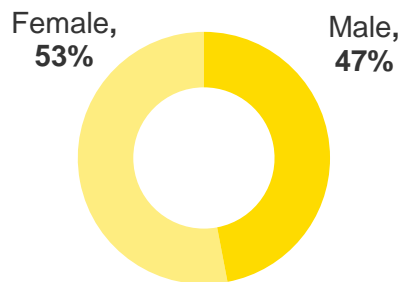




Getting to know your segments – BELIEVERS

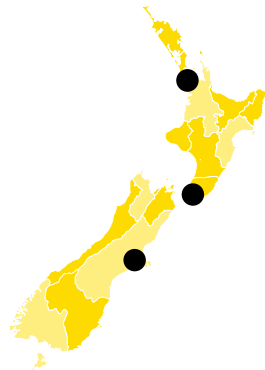
Believers are **heavily influenced by social factors**, thinking their choices show others who they are and what they believe in.

GENDER

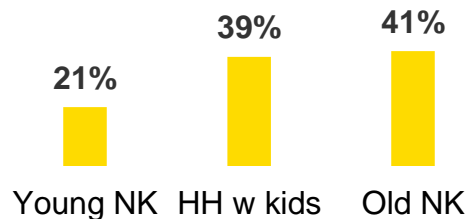


REGION

Auckland	30%
Wellington	10%
Canterbury	13%
Upper NI	55%
Lower NI	19%
SI	26%



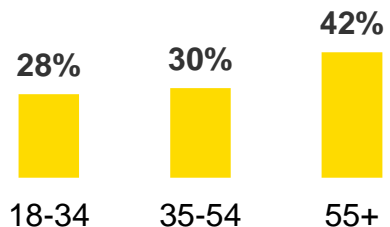
HOUSEHOLD



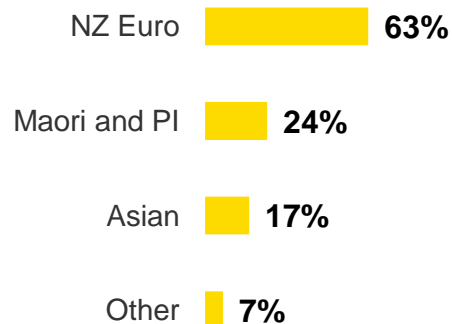
HOUSEHOLD SHOPPER



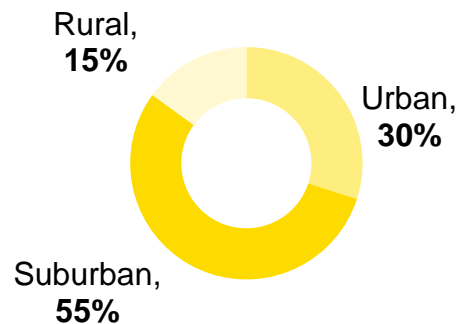
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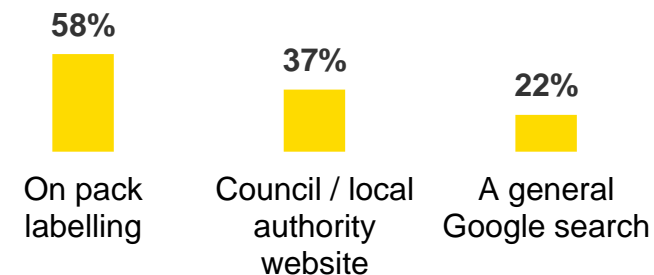
ETHNICITY



RURAILITY



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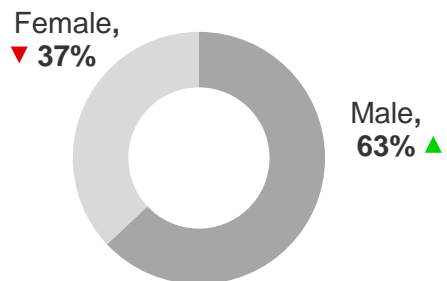




Getting to know your segments – DISMISSERS

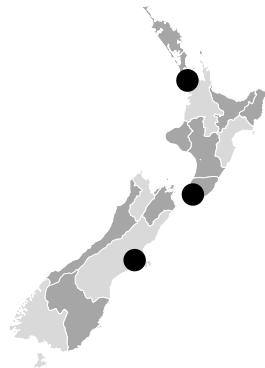
Dismissers are characterised by their apathy to all things sustainable

GENDER

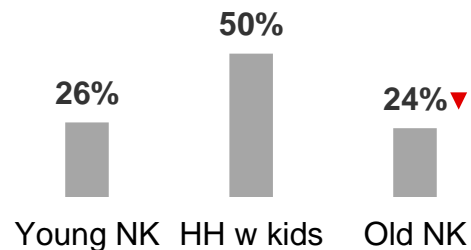


REGION

Auckland	34%
Wellington	11%
Canterbury	15%
Upper NI	54%
Lower NI	23%
SI	24%



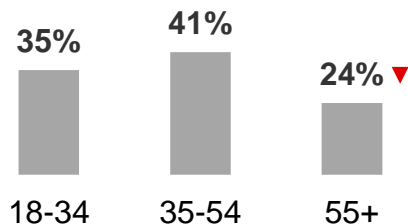
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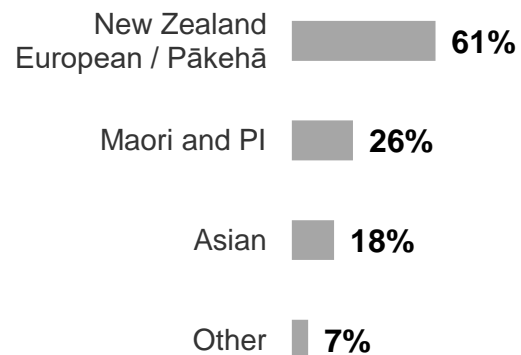
HOUSEHOLD SHOPPER



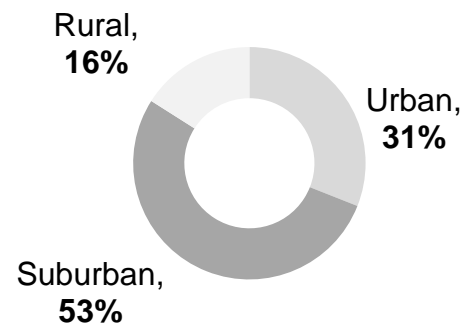
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