

Horizon Research

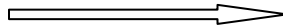
Plastics Recycling Survey

March 2012

This Survey has been commissioned by:-



as part of a Feasibility Study : Installing a RPET (recycled polyethylene terephthalate) plant in Greater Wellington region



Financial support for this Feasibility Study has been received from **“the Waste Minimisation Fund, which is administered by the Ministry for the Environment.”**

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1. METHODOLOGY

Horizon Research surveyed 1,138 respondents nationwide between 20th March and 31st March 2012

Respondents are members of the HorizonPoll online panel, recruited to match the New Zealand population aged 18+ weighted by age, gender, personal income, ethnicity, region and employment status. Maximum margin of error at a 95% confidence level +/- 3.1%.

Qualitative responses and table results are available on the Horizon online results system.

2. EXECUTIVE SUMMARY

The survey was conducted to investigate the attitudes of New Zealanders to the recovery and recycling of plastic packaging but included questions relating to packaging in general.

From the number and nature of comments by respondents, packaging is a topic which generates much discussion specifically around concerns about:

- over-packaging;
- sending packaging off shore and resulting “recycling miles”;
- the need for manufacturers to be more responsible;
- preference for packaging which can be recycled into new packaging (e.g. glass) and;
- for local recycling options where cost effective.

Top-line Results

Consumer Recycling Attitudes

- 71% say they are recycling at home and away from home
- Soft drinks containers (80%) and milk containers (89%) are the most common types of plastics we recycle
- Less than one third (32%) look at labels most or all of the time to check information about the product

Recycling Preferences

There is

- 83% support for New Zealand-based recycling;
- 91% support for local councils' plastics going to supply a New Zealand based company;
- 55% support for councils investing in the New Zealand based company;

- 94% (rate packaging which can be recycled as somewhat to very important although only 60% people consider this in making a purchasing decision;
- A 78% importance rating for buying packaging which is made from recycled materials; and
- A 10 to 20 cent maximum price increase tolerance to increase recycling by manufacturers using packaging made from recycled materials.

Brands

- Around 30% people believe the supermarket brands (Countdown and Pams) use packaging which contains recycled materials. These two retail brands rate higher than manufacturers' brands including Coke, Pepsi and Fonterra which polled around 20% each.

Regional Preferences

When asked if a company established an operation in NZ to process recycled plastic whether they would want their local council to supply the plant 91% want their Councils to send the plastic packaging collected from kerbside to a New Zealand based recycling operation. This can be further broken down by regional responses:-





Local Government Area	Want Council to send plastic to on shore plant
Auckland	88.70%
Christchurch	88.10%
Dunedin	92.70%
Hamilton	89%
Hutt	100%
Wellington	87.40%

SURVEY QUESTION AND ANSWERS

1. Firstly, how many plastic bottles or containers do you put in your recycling bin each week?











A. None		3.5%
B. 1-5		39.4%
C. 6-10		33.7%
D. 10 or more		23.4%

2. How would you rate your own recycling performance?

A. Excellent (recycle home, work, public)		29.2%
B. Very Good (recycle home, work)		42.1%
C. Good recycle home		25.1%
D. Poor (don't recycle)		3.5%




3. Which of the following plastic containers do you recycle at home, if any?

Please select all that apply

A. Soft Drinks containers		80.4%
B. Milk bottles		89.9%
C. Fruit and vegetable punnets		64.4%
D. Sauces and salad dressing bottles		79.1%
E. Ice cream containers		71.9%
F. Margarine tubs		68%
G. Shampoo bottles		78.9%
H. Washing up liquid bottles		79.7%
I. Other		35.2%
J. None of these		3%







4. What do you think happens to the plastic containers after they have been collected from your kerbside?

Please select one of the following:

A. They get recycled in New Zealand		37.8%
B. They get sent overseas to be recycled		35%
C. I don't know		27.3%

5. Which of the following do you think are made from recycled plastic containers?

A. New plastic drinks bottles		49.7%
B. New food packaging		47.2%

C. Clothing		27.4%
D. Carpets		33.5%
E. Recycling bins		71.8%
F. Plastic pallets		78.7%
G. Car parts		23.1%
H. Other things (please tell what they are)		7.5%

Council collections

A significant proportion of the plastic recycled in New Zealand is collected by local Councils.

6. Does your Council prefer to recycle packaging in New Zealand or overseas?

A. New Zealand		19.5%
B. Overseas		5.1%
C. Don't know		75.4%

7. Would you like your council to choose New Zealand based recycling options if these exist?

A. Yes		82.7%
B. No		0.6%
C. Have no preference		11.3%
D. Not sure		5.4%

Recycling

Most of the plastic collected in New Zealand for recycling is sent overseas to be processed and remade into products.

If a company established an operation in New Zealand to process recycled plastic, which of these would you generally support?

8. My local council plastic recycling collection going to supply the New Zealand based company

1. Yes		91.3%
2. No		1.5%
3. Not sure		7.3%

8.1. My local council investing in the company?

1. Yes		55.4%
2. No		18.6%
3. Not sure		26%

8.2. Continued processing of my plastic waste overseas

1. Yes		8.4%
2. No		62%
3. Not sure		29.6%









8.5. Why do you say that?

(Text responses not included in this report)

People have told us some of the things that they believe are important about the way things are packaged. How important are each of these things to you?


9.1. Packaging protects the product

Please select an answer for each statement.









A. Very important		42.7%
B. Important		30.4%
C. Somewhat important		16.2%
D. Neither important nor unimportant		4.4%
E. Somewhat unimportant		1.8%
F. Mostly unimportant		2.3%
G. Not important at all		1.1%
H. Not sure		1.2%

9.2. Packaging preserves shelf life









A. Very important		28.4%
B. Important		33.7%
C. Somewhat important		20.8%

D. Neither important nor unimportant		8.1%
E. Somewhat unimportant		1.9%
F. Mostly unimportant		3.1%
G. Not important at all		1.7%
H. Not sure		2.2%









9.3. Products are not over packaged

A. Very important		52.8%
B. Important		27%
C. Somewhat important		10.2%
D. Neither important nor unimportant		5.4%
E. Somewhat unimportant		1.1%
F. Mostly unimportant		0.8%
G. Not important at all		0.3%
H. Not sure		2.4%







9.4. Packaging can be recycled

A. Very important		63.9%
B. Important		22.9%
C. Somewhat important		7.4%
D. Neither important nor unimportant		3.2%
E. Somewhat unimportant		0.6%
F. Mostly unimportant		0.2%
G. Not important at all		0.6%
H. Not sure		1.2%

9.5. Packaging is made from recycled materials

A. Very important		42.6%
B. Important		28.8%
C. Somewhat important		15.6%
D. Neither important nor unimportant		8.2%
E. Somewhat unimportant		1.7%
F. Mostly unimportant		0.3%
G. Not important at all		0.9%
H. Not sure		2%

9.6. Packaging can be reused (e.g. water bottles)

A. Very important		49.3%
B. Important		31%
C. Somewhat important		10.3%
D. Neither important nor unimportant		5.4%
E. Somewhat unimportant		0.7%
F. Mostly unimportant		0.6%

- | | | |
|-------------------------|--|------|
| G. Not important at all | | 0.4% |
| H. Not sure | | 2.3% |

10. Is there anything else which is important to you about the way things are packaged?

(Text responses not included in this report)

11. When you are shopping do you look at labels to see if products can be recycled?

- | | | |
|---------------------|---|-------|
| A. All of the time | ■ | 6.7% |
| B. Most of the time | ■ | 25.2% |
| C. Sometimes | ■ | 41.1% |
| D. Never | ■ | 27% |

12. How would you rate the importance of being able to recycle a product's packaging to your decision to buy it?

- | | | |
|----------------------------|---|-------|
| A. Very important | ■ | 12.6% |
| B. Important | ■ | 22.5% |
| C. Somewhat important | ■ | 25.6% |
| D. Neutral | ■ | 20.8% |
| E. Somewhat unimportant | ■ | 3.3% |
| F. Mostly unimportant | ■ | 4.8% |
| G. Of no importance at all | ■ | 8.3% |
| H. Not sure | | 2.2% |

13. How would you rate the importance of packaging being made from recycled materials?

- | | | |
|----------------------------|---|-------|
| A. Very important | ■ | 24.3% |
| B. Important | ■ | 30.2% |
| C. Somewhat important | ■ | 24.2% |
| D. Neutral | ■ | 11.5% |
| E. Somewhat unimportant | | 1.8% |
| F. Mostly unimportant | | 2.6% |
| G. Of no importance at all | ■ | 4% |
| H. Not sure | | 1.3% |

Which of the following brands do you think use recycled plastic in their packaging?

14.1. Coca Cola

Please select an answer for each brand

- | | | |
|-----------------|---|-------|
| A. Yes | ■ | 25.1% |
| B. No | ■ | 11.4% |
| C. I don't know | ■ | 63.5% |

14.2. Countdown - Signature Range

- | | | |
|-----------------|---|-------|
| A. Yes | ■ | 31.6% |
| B. No | ■ | 6.8% |
| C. I don't know | ■ | 61.6% |

14.3. Fonterra

A. Yes		26.3%
B. No		10.8%
C. I don't know		62.9%

14.4. Pepsi

A. Yes		20.1%
B. No		11.1%
C. I don't know		68.8%

14.5. Pams - New World

A. Yes		30.2%
B. No		7.1%
C. I don't know		62.7%

14.6. Pump

A. Yes		24.9%
B. No		10%
C. I don't know		65.1%

14.7. Schweppes

A. Yes		21.2%
B. No		10.7%
C. I don't know		68.1%

15. Are there any other brands that you think use recycled plastic in their packaging?

(Text responses not included in this report)

16. Would you encourage brands to include some food grade recycled plastic in their new drinks and food containers?

A. Yes		80.7%
B. No		4.5%
C. I don't have an opinion		14.8%

Please tell us whether you agree or disagree with the following statements:






17.1. I expect the packaging on the products I buy to be recyclable

Please select an answer for each statement





A. Strongly agree		32.7%
B. Agree		38.8%
C. Neutral		21.1%
D. Disagree		5%
E. Strongly disagree		1.9%

F. Don't know | 0.6%


17.2. The price of a product is more important than whether its packaging is recyclable

A. Strongly agree		13.4%
B. Agree		34%
C. Neutral		30.5%
D. Disagree		16.6%
E. Strongly disagree		4.7%
F. Don't know		0.8%

17.3. All packaging should be recyclable

A. Strongly agree		43.4%
B. Agree		37.8%
C. Neutral		13.7%
D. Disagree		3%
E. Strongly disagree		1.3%
F. Don't know		0.6%

17.4. Recycling is too difficult

A. Strongly agree		2.1%
B. Agree		3.2%
C. Neutral		9.1%
D. Disagree		33.3%
E. Strongly disagree		48.8%
F. Don't know		3.5%

Costs

The use of recycled plastic in products could have an impact on the prices consumers pay. Please imagine you were going to buy an everyday grocery item that usually cost \$5. You have the choice of the same product packaged in two ways - one in plastic containing recycled plastic and the other in plastic packaging that was made from new plastic materials.

For each price difference we have listed, please tell us whether you would prefer to buy the product packaged in recycled plastic or the product packaged in plastic that was not recycled.

Use of recycled plastic means that a grocery item would be:

18.1. 30 cents cheaper

A. Prefer recycled		86.8%
B. Prefer not recycled		2.6%

C. Makes no difference  10.6%

18.2. 20 cents cheaper

A. Prefer recycled  86%
 B. Prefer not recycled  3.1%
 C. Makes no difference  10.9%

18.3. 10 cents cheaper

A. Prefer recycled  85%
 B. Prefer not recycled  3.3%
 C. Makes no difference  11.7%

18.4. The same price

A. Prefer recycled  74.1%
 B. Prefer not recycled  4.8%
 C. Makes no difference  21.1%

18.5. 10 cents dearer

A. Prefer recycled  59%
 B. Prefer not recycled  23.4%
 C. Makes no difference  17.6%

18.6. 20 cents dearer

A. Prefer recycled  48%
 B. Prefer not recycled  34.6%
 C. Makes no difference  17.3%

18.7. 30 cents dearer

A. Prefer recycled  35.1%
 B. Prefer not recycled  47%
 C. Makes no difference  18%

18.8. 40 cents dearer

A. Prefer recycled  31.2%
 B. Prefer not recycled  52.6%
 C. Makes no difference  16.2%

18.9. 50 cents dearer

A. Prefer recycled  29.2%
 B. Prefer not recycled  54.6%
 C. Makes no difference  16.2%

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APPENDIX

Support for local council supplying New Zealand based company by primary household shopper and main cities

<p>If a company established an operation in New Zealand to process recycled plastic, which of these would you generally support?</p> <p>Q8. My local council plastic recycling collection going to supply the New Zealand based company</p> <p>1. Yes 2. No 3. Not sure</p>				
	Total	Yes	No	Not sure
ALL	1111	91.30%	1.50%	7.30%
HOUSEHOLD DECISION TYPE				
Equal	56%	92.80%	1.20%	6%
None	6%	78.30%		21.70%
Primary	36%	92.40%	1.50%	6.20%
LOCAL GOVERNMENT AREA				
Auckland Council	34%	88.70%	3.70%	7.50%

Christchurch City	9%	88.10%	0.40%	11.50%
Dunedin City	3%	92.70%		7.30%
Hamilton City	2%	89.10%		10.90%
Hutt City	3%	100%		
Wellington City	7%	87.40%	1%	11.60%

Price sensitivity – by household decision maker type

Your plastic waste Survey Results Table (Weighted)

COSTS

The use of recycled plastic in products could have an impact on the prices consumers pay. Please imagine you were going to buy an everyday grocery item that usually cost \$5. You have the choice of the same product packaged in two ways - one in plastic containing recycled plastic and the other in plastic packaging that was made from new plastic materials.. For each price difference we have listed, please tell us whether you would prefer to buy the product packaged in recycled plastic or the product packaged in plastic that was not recycled.

Use of recycled plastic means that a grocery item would be:

Q18.1. 30 cents cheaper

Multichoice Grid - Single Answer Only

- A. Prefer recycled
- B. Prefer not recycled
- C. Makes no difference

	Total	A	B	C
ALL	1067	86.8%	2.6%	10.6%

HOUSEHOLD DECISION TYPE

Equal	56%	86.9%	3.1%	9.9%
None	6%	90.4%		9.6%
Primary	36%	85.6%	2%	12.3%

Q18.2. 20 cents cheaper

Multichoice Grid - Single Answer Only

- A. Prefer recycled
- B. Prefer not recycled
- C. Makes no difference

	Total	A	B	C
ALL	1056	86%	3.1%	10.9%

HOUSEHOLD DECISION TYPE

Equal	55%	86.5%	3.3%	10.2%
None	6%	90.4%		9.6%
Primary	37%	84.3%	3%	12.7%

Q18.3. 10 cents cheaper

Multichoice Grid - Single Answer Only

- A. Prefer recycled
- B. Prefer not recycled
- C. Makes no difference

	Total	A	B	C
ALL	1056	85%	3.3%	11.7%

HOUSEHOLD DECISION TYPE

Equal	55%	86.9%	2.3%	10.8%
-------	-----	-------	------	-------

None	6%	82.2%	8.2%	9.6%
Primary	36%	82.3%	3.7%	14%
Q18.4. The same price				
Multichoice Grid - Single Answer Only				
A. Prefer recycled B. Prefer not recycled C. Makes no difference				
	Total	A	B	C
ALL	1067	74.1%	4.8%	21.1%
HOUSEHOLD DECISION TYPE				
Equal	56%	76.2%	3.9%	19.9%
None	6%	65.1%	8.2%	26.8%
Primary	36%	73.1%	4.6%	22.4%
Q18.5. 10 cents dearer				
Multichoice Grid - Single Answer Only				
A. Prefer recycled B. Prefer not recycled C. Makes no difference				
	Total	A	B	C
ALL	1056	59%	23.4%	17.6%
HOUSEHOLD DECISION TYPE				
Equal	55%	61.3%	21.6%	17.1%
None	6%	51.3%	29.4%	19.3%
Primary	36%	57.3%	24.2%	18.5%
Q18.6. 20 cents dearer				
Multichoice Grid - Single Answer Only				
A. Prefer recycled B. Prefer not recycled C. Makes no difference				
	Total	A	B	C
ALL	1054	48%	34.6%	17.3%
HOUSEHOLD DECISION TYPE				
Equal	55%	50.4%	33.1%	16.5%
None	6%	50.4%	31.5%	18%
Primary	36%	44.4%	37%	18.6%
Q18.7. 30 cents dearer				
Multichoice Grid - Single Answer Only				
A. Prefer recycled B. Prefer not recycled C. Makes no difference				
	Total	A	B	C
ALL	1052	35.1%	47%	18%
HOUSEHOLD DECISION TYPE				
Equal	56%	36.2%	47.5%	16.3%
None	6%	42.3%	33.2%	24.6%
Primary	36%	33.1%	47%	19.8%