

Public Place Recycling and Litter Survey 2020

**Prepared for
The Packaging Forum
APRIL 2020**

1. METHODOLOGY

Horizon Research surveyed 1,076 respondents nationwide between 30th March and 2 April 2020.

Respondents are members of the HorizonPoll online panel and a third party research panel which are representative of the New Zealand population aged 18+ at the 2018 census.

The survey is weighted by age, gender, educational qualification, personal income, region and employment status to provide a representative sample of the New Zealand adult population at the most recent census. At a 95% confidence level, the maximum margin of error is +/- 3%.

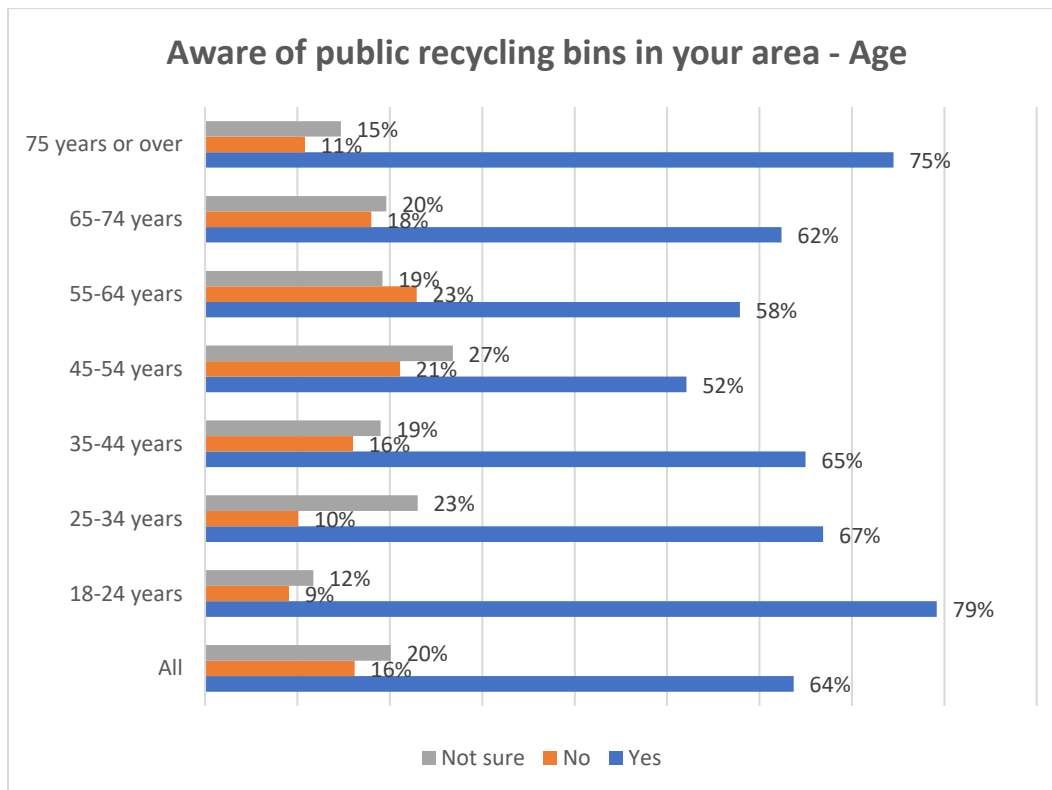
Results were compared with data from similar surveys conducted in March 2019, March 2018, April 2017, May 2016, June 2015, April 2014, April 2013, July 2012 and November 2011.

REPORT

Public Place Recycling Bins and the Love NZ brand

64% of respondents said they had public place recycling bins in their area – up from 59% in 2019. This result indicates that **about 2.3 million adults** have public place recycling in their area. **23%** say they have Love NZ branded recycling bins in their area (up slightly on 22% in 2019 and an increase from 10% in 2015).

There is little difference in awareness by personal income and household type, but awareness falls below the overall average of 64% to 52% among those aged 45 to 54 years. It is highest among those aged 18-24 (79%) and 75+ (75%).



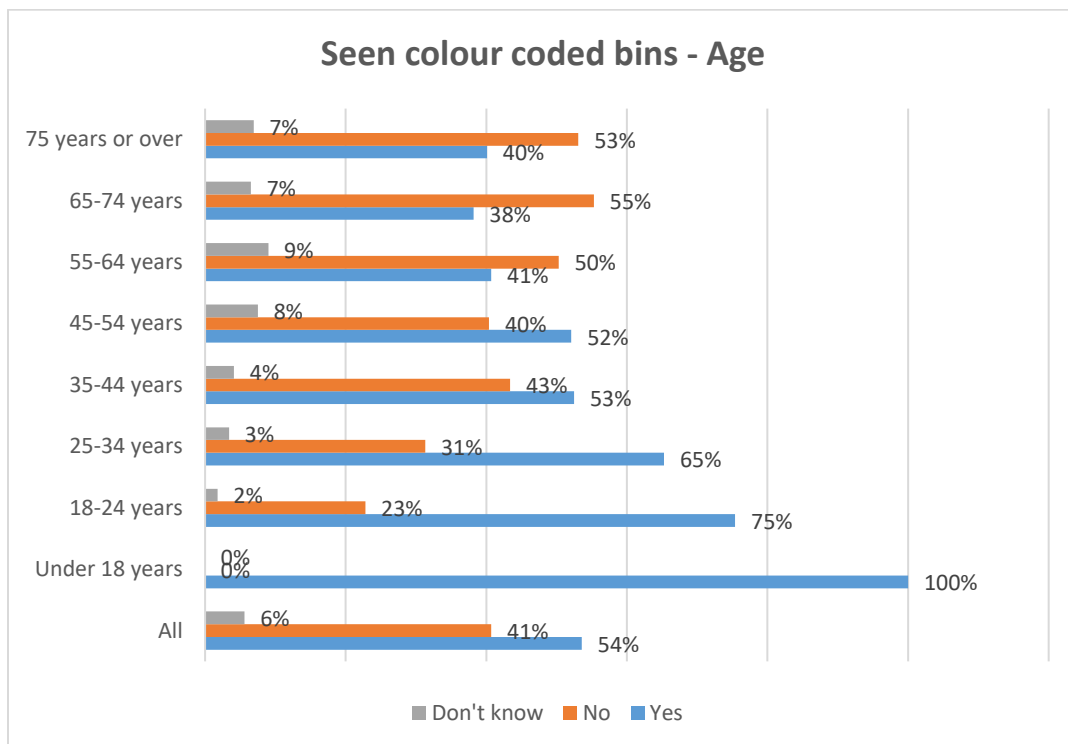
New colour-coded bins

54% of respondents, equivalent to around **1.94 million adults**, have seen the new Colour Coded Recycling and Rubbish Bins – up significantly from 37% in 2019. **83%** said that the colours and signage make the bins easier to use. Recognition in places where the bins have been installed for over 12 months is as follows: Marlborough District (80%); New Plymouth (61%) Clutha District (100%); Tauranga (66%); Wellington (77%) Queenstown Lakes (100%). *Note the Clutha District and Queenstown Lakes result is from a small respondent sample and is highly indicative only.*

The number who had seen the colour coded bins varied significantly by age.

Compared with the overall result of 54%, 79% of 18-24-year-olds had seen the bins and 65% of those aged 25-34 years.

The number who had not seen the bins peaked at 43% among those aged 55+ (53%).

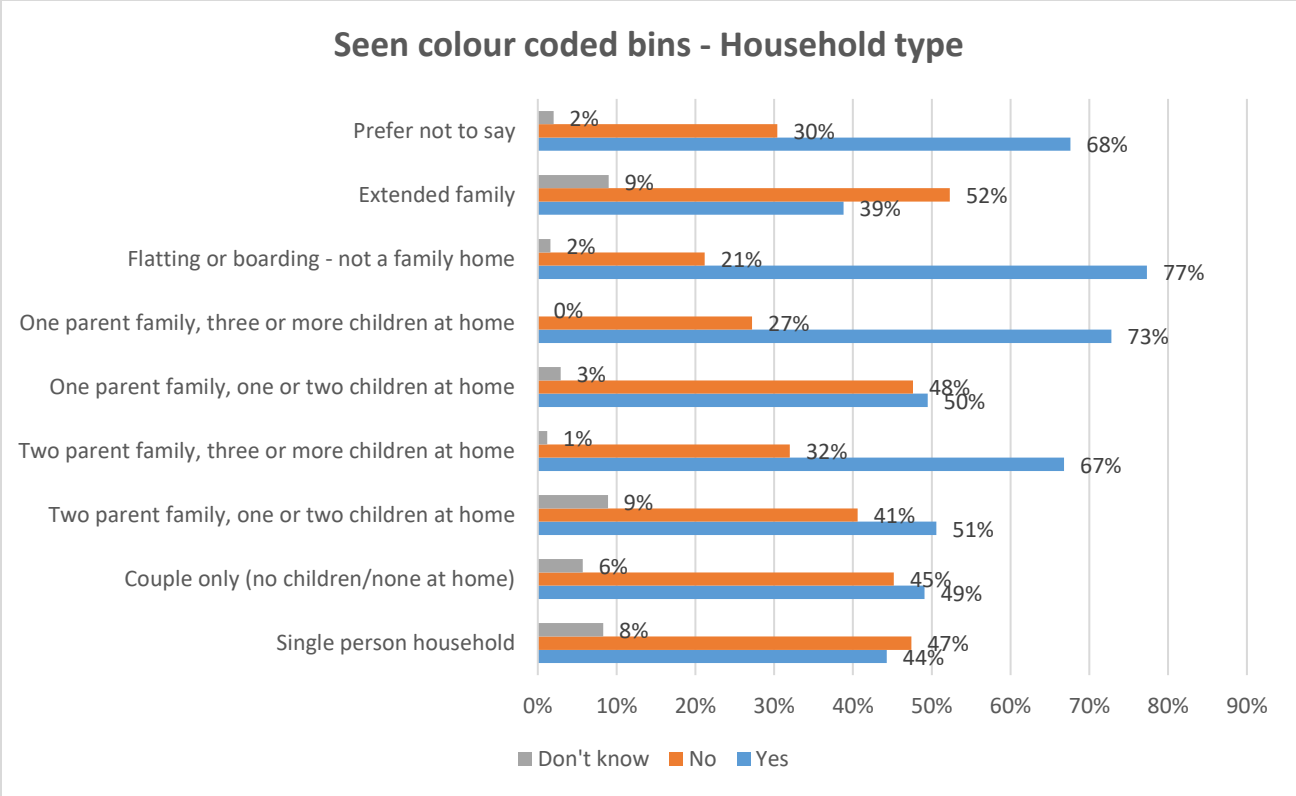


Seen bins – by household type:

There were significant variations in the number of who seen colour coded bins according to their household type.

Single parent households with one or two children at home were most likely to say they had not seen a colour coded bin (48%). 50% had seen a bin.

Among the predominant household type, two parent families with one or two children at home, 67% had seen the bins, 32% had not.



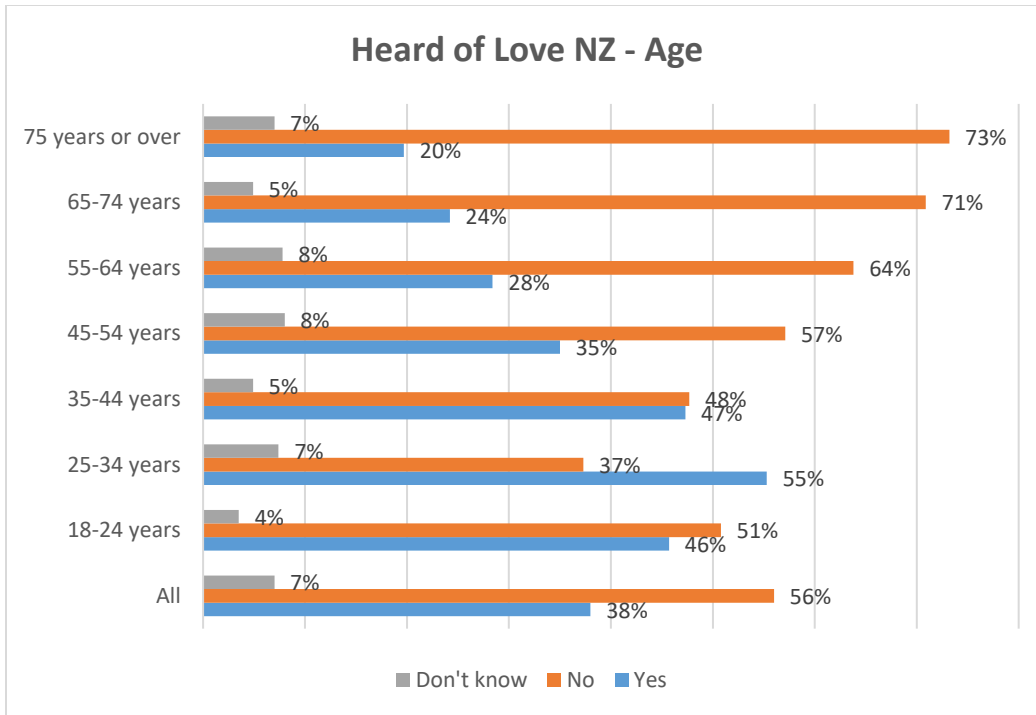
Love NZ brand

38% of respondents said they were aware of the Love NZ brand before the survey (compared to 27% in 2019; 40% in 2018, 35% in 2017; 29% in 2016). This indicates that around **1.36 million adults** are currently aware of the Love NZ brand. The variation between awareness in 2018 and 2020 is not statistically significant.

There was a marked difference in awareness of the brand by age.

The older people are the less likely they are to have heard of it. This includes 73% of those aged 75+, 71% of 65-74-year-olds and 64% of 55-64-year-olds.

The highest number to have heard of Love NZ before the survey was 55%, of 25-34-year-olds.



Perspective on Litter

29% of respondents (equivalent to around 1,042,000 adults) said there was a problem with litter where they live – which shows a significant reduction from 44% in 2019 and previous results in 2017 and 2018.

The number who will make an extra effort to walk to bins has remained constant.

21% of people said they would not walk more than 10 metres to find a rubbish or recycling bin (21% in 2019 and 30% in 2017).

37% of people said they would walk more than 40 metres, equivalent to around 1.33 million adults -29% in 2019 and significantly up from 23% in 2018 (826,969 adults).

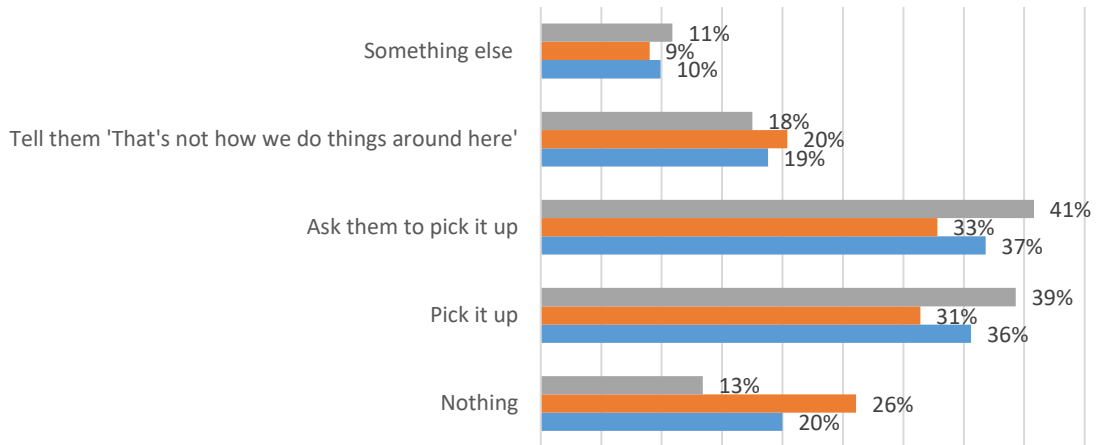
Willingness to walk each distance measured does not appear to be influenced by age or gender.

37% said they would tell someone to pick it up if they saw someone drop litter in the street (38% in 2019) while **36%** said they would pick litter up themselves (36% in 2019).

Women were more likely to ask someone dropping litter to pick it up: 41%, compared with men 33%.

Women were also more likely to pick up the litter themselves (39%) than men (31%).

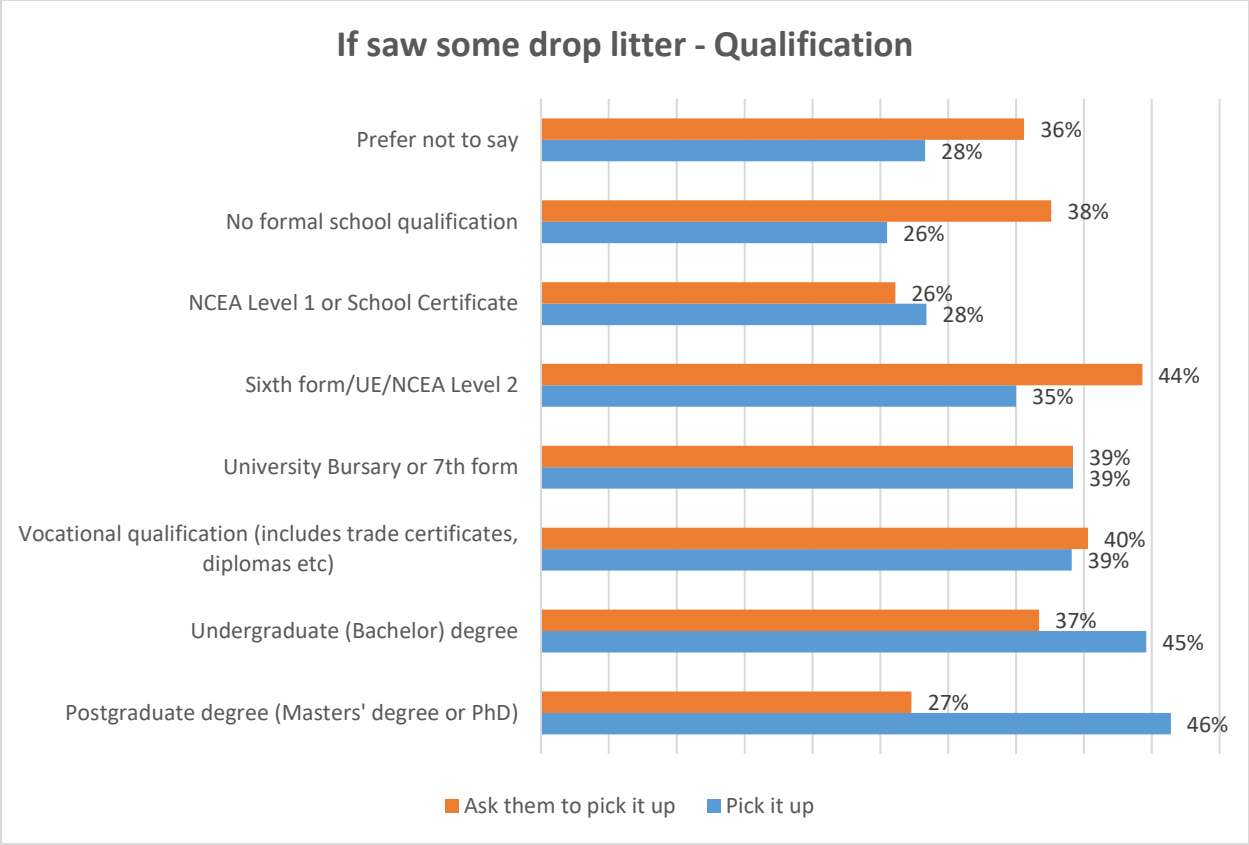
Reaction if saw someone dropping litter - Gender



	Nothing	Pick it up	Ask them to pick it up	Tell them 'That's not how we do things around here'	Something else
■ Female	13%	39%	41%	18%	11%
■ Male	26%	31%	33%	20%	9%
■ All	20%	36%	37%	19%	10%

■ Female ■ Male ■ All

Educational qualification levels also appear to have an influence on directly asking others to pick up litter or pick it up themselves. Those with degrees or post graduate degrees were more likely than average to pick it up themselves.

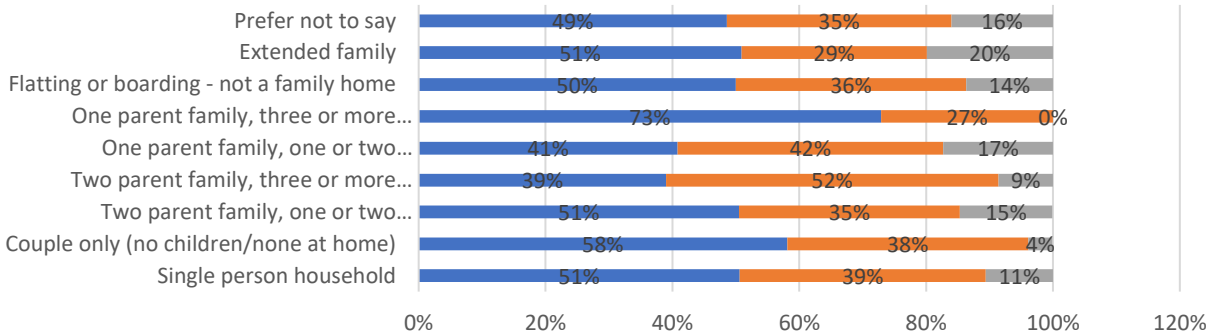


Home Composting

51% of respondents said they have a compost bin at home for their garden waste and food scraps. Of these 60% said that they put compostable products, like compostable packaging, in their home compost bin.

By household type, the likelihood of having a home compost bin is highest among couples with no children at home which is also the most predominant household type. The result for one parent families with more than 3 children at home, while higher (73%) is based on a small sample size. Lowest use is by two parent families with more than 3 children at home (39%).

Have a compost bin - Household type



	Single person household	Couple only (no children/none at home)	Two parent family, one or two children at home	Two parent family, three or more children at home	One parent family, one or two children at home	One parent family, three or more children at home	Flatting or boarding - not a family home	Extended family	Prefer not to say
■ Yes 51%	51%	58%	51%	39%	41%	73%	50%	51%	49%
■ No 39%	39%	38%	35%	52%	42%	27%	36%	29%	35%
■ No, but I would like to get one 11%	11%	4%	15%	9%	17%	0%	14%	20%	16%

■ Yes 51% ■ No 39% ■ No, but I would like to get one 11%

Possession of a home compost bin is consistent across all household income groups, except

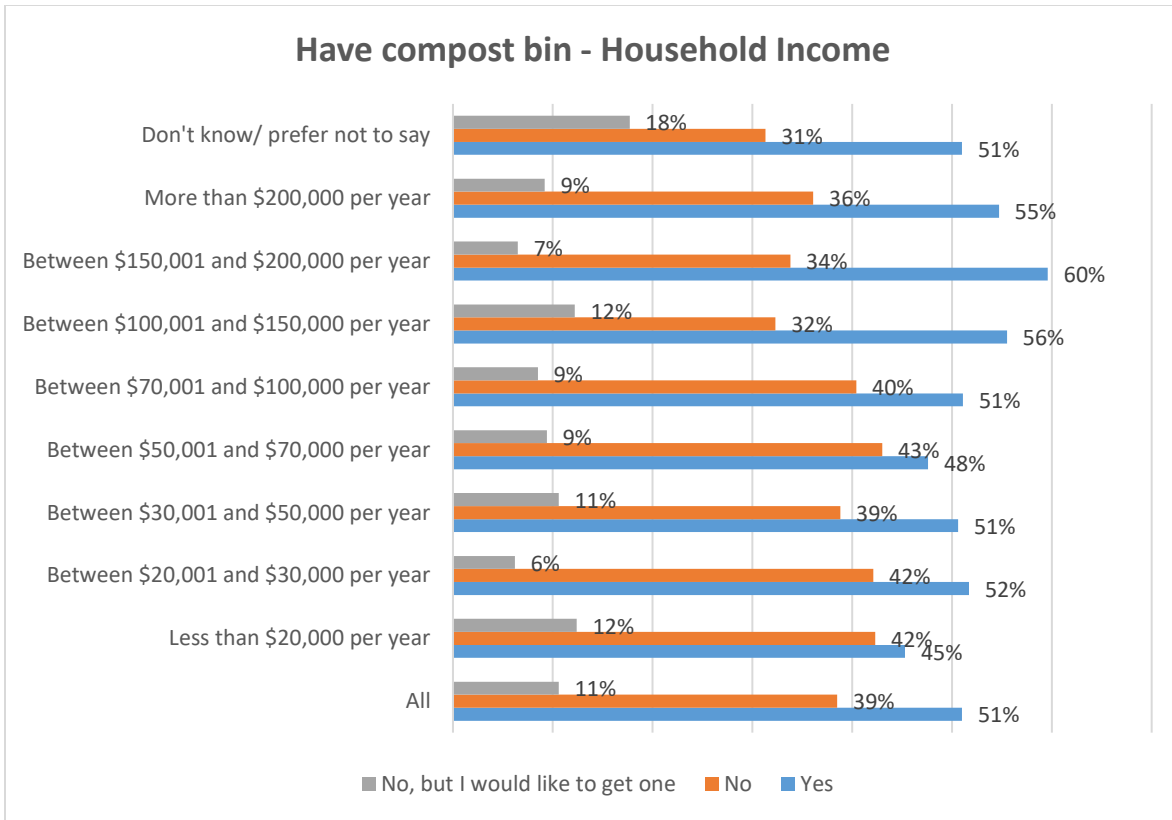
Do you have a compost bin at home for your garden waste and food scraps	All	Couple no children at home	Extended Family	Flatting	One parent family, 1 or 2 children at home	One parent family, 3+children at home	Prefer not to say	Single person	Two parent family, 1 or 2 children at home	Two parent family, 3+children at home
Yes	51.0%	58.1%	50.9%	50.0%	40.8%	72.9%	48.6%	50.6%	50.5%	39.0%
No	38.5%	38.0%	29.2%	36.3%	41.9%	27.1%	35.4%	34.8%	34.8%	52.4%
Not sure	10.6%	3.8%	19.9%	13.7%	17.3%	0.0%	16.0%	14.6%	14.6%	8.6%

Households with incomes of \$20,000 or less a year are least likely to have a bin (45%), compared with 51% overall.

Households with incomes of \$150,001 to \$200,000 per year are most likely to have a compost bin (60%).

56% of households with incomes of \$100,001 to \$150,000 and 56% of households with incomes of more than \$200,000 a year have bins.

48% of middle-income households (\$50,001 to \$70,000 per year) have bins. 11% overall would like to get a household bin and this is fairly consistent across household income groups.

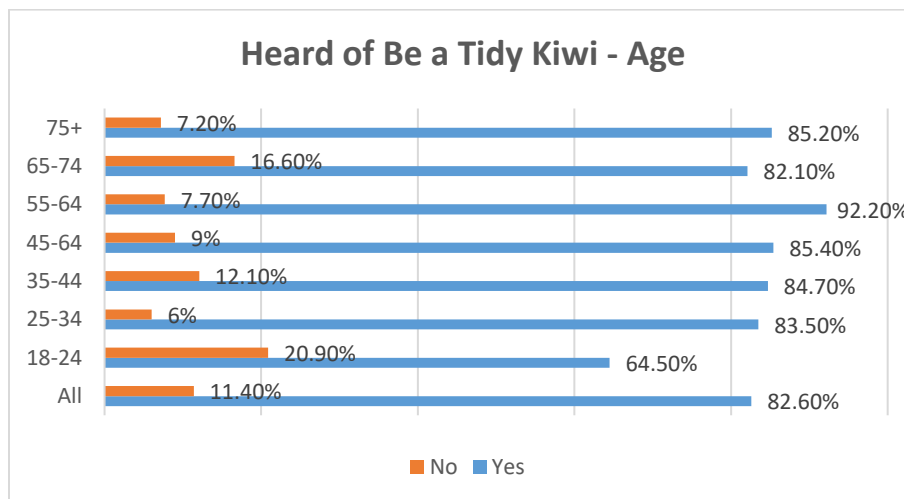


Brand Awareness

Awareness of Love NZ has remained constant at **38%** (37% in 2019; 40% in 2018; 37% in 2017).

The *“Be a Tidy Kiwi”* brand was recognised by 83% or around 2.98 million adults – (**92%** in 2019; 87% in 2018; 84% in 2017).

Awareness increases with age but is still high at 84% among 25-34-year-olds. It is 92% among those aged 55-64.

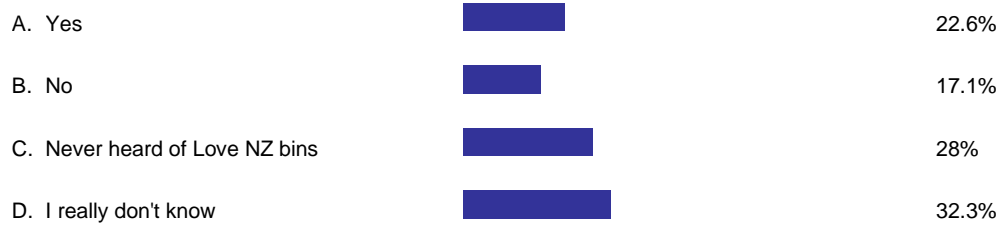


Top line results

Do you have public recycling bins in your area (local town / city)?



Do you have Love NZ branded recycling bins in public places in your area (local town/city)?



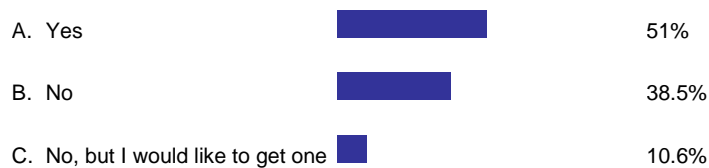
Have you seen the new Colour Coded Recycling and Rubbish Bins?



Did the colours and signage make the bins easier to use?



Do you have a compost bin at home for your garden waste and food scraps?

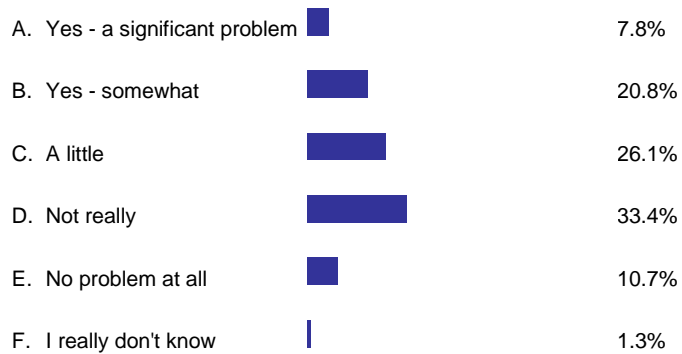


Do you put compostable products such as compostable packaging in your home compost bin?

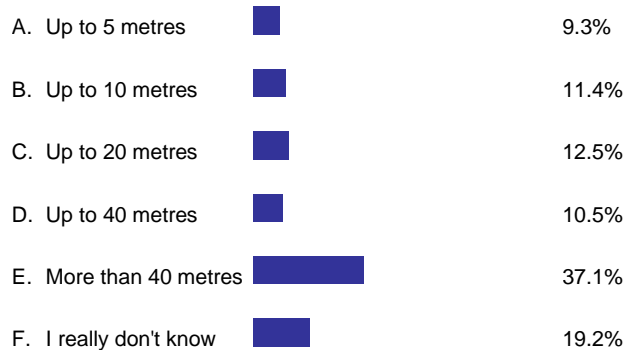


Litter in your area

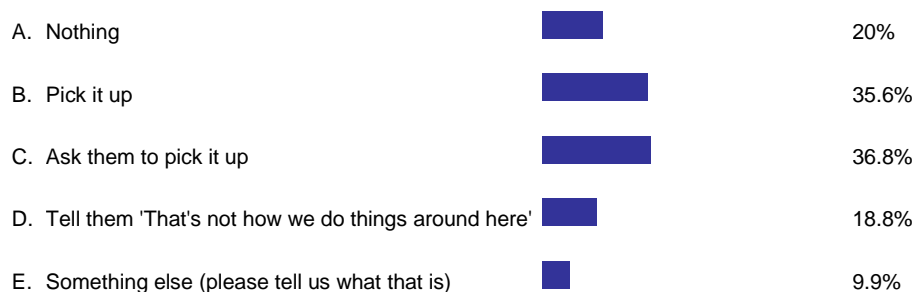
Do you think there is a problem with litter in your neighbourhood?



In general, how far would you walk to find a rubbish bin or a recycling bin?



What would be your reaction if you saw someone drop litter on the street?



In comments, people expressed concern about violent reactions, including in the current COVID-19 climate, to picking up litter. Some suggested a contact number for councils so that offenders could be reported.

A number of people have also asked for a consistent approach to what can be recycled: "The rules keep on changing on what is acceptable and what is not!". Others said that they are concerned that "recycling is a con I can't be sure that what I put in the recycling bin actually gets recycled. There were also requests for better labelling on packaging.

Several respondents would like to see kerbside compost collections.

As the survey was conducted soon after the start of the COVID-19 lockdown, there were numerous comments about why recycling had stopped during this period.

Before this survey, had you heard of Love NZ?



Have you heard of 'Be a Tidy Kiwi'?

