



# **Horizon Research**

# **Recycling Scheme Proposals**

**April 2022 Survey**

**April 2022**

**Prepared for The Packaging Forum**



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## EXECUTIVE SUMMARY

This report gives the results of a survey on proposed Government recycling policies for The Packaging Forum.

Conducted online between April 7 and 18 2022, the survey has 984 respondents aged 18+. The sample was weighted to represent the New Zealand adult population at the most recent census.

The survey has an overall margin of error of  $\pm 3.1\%$ .

## **Background**

In March 2022, the Government announced it was consulting on:

- Improved kerbside recycling so New Zealanders can recycle the same materials all around the country and have access to a food scraps bin at kerbside.
- A scheme that incentivises people to return their empty drink containers for recycling, excluding white dairy milk and cream containers.
- Separation of businesses' food scraps from general waste to reduce greenhouse gasses and put the scraps to positive uses.

## SUMMARY OF FINDINGS

### **Container Return Scheme**

The Government is consulting on a Container Return Scheme which it expects will encourage people to return beverage containers (excluding for recycling or refilling in exchange for a refundable deposit).

The survey finds support for the idea of a scheme is high, but this falls dramatically when its costs per 24-pack of drinks is known. A quarter of adults are not prepared to travel to a container recycling depot and **44%** will not queue at one for any length of time.

- **71%** of people support the scheme. This equates to around **2,815,200** people aged 18+. **36%** oppose, **15%** are neutral and **6%** don't know.

The highest level of support is among couples without children at home and 18-24 year-olds and those aged 55+. The lowest level of support at **65%** is among 45-54 year olds.

- When presented with detail of possible extra cost, however, overall support falls to **44%** (around **1,736,700** people aged 18+ years) and **36% oppose**.

18-24 year olds and those without children at home continue to support the scheme. There is drop in support among 55-64 year olds, with **33%** saying they would support it with the costs (vs **44%** of all respondents).

- **34%** of people are prepared to travel up to 10 minutes to drop off containers for a refund. **21%** will travel up to 15 minutes. A quarter of adults are not prepared to travel.

Younger people are more prepared to travel, with **24%** saying they would travel up to 20 minutes. People aged 45+ years are the least likely to travel to drop off containers for a refund.

- Queueing is not popular, with 44% saying they would not queue for a container refund. For the people who would queue, 41% are prepared to wait 10 minutes.

Families with children and people aged 75+ years are the least likely to queue.

## Measuring Litter

- **30%** say that litter should be measured in cubic litres. But a quarter also say they “don’t know.”

Larger households (two parent families with 3 children) have more of a view on how litter should be measured with **47%** saying cubic litres and **6%** saying they “don’t know”.

## Pay extra in rates or taxes

- 47% say they will not pay extra in rates or taxes to reduce litter by 15%. The people least likely to want to pay extra are aged 45+ years, with 62% of 55-64 year olds saying they will not pay more. Larger households with children are also unwilling to pay extra.

Younger respondents are more willing to pay extra, with **23%** of 18-24 year olds prepared to pay \$50 vs **14%** of all respondents.

## Kerbside collections

- 26% are okay with the changes to kerbside collections and 26% also want the collections standardised to the “best councils”.

Among 18-24 year olds, there is more support with **47%** saying they are ok with it. While **32%** also say they want to continue recycling the amount they currently do.

At **20%**, larger households are the least likely to support the changes and are more likely to want to stick with the amount they currently recycle.

- **52%** of people want the convenience of one mixed recycling bin. The interest in having one bin is particularly high among larger families; 35-54 year olds and people who live in big cities.

Those in regional towns and cities are happy to have several bins for recycling materials.

## RESULTS

### 1. Measuring Litter

Litter is measured in different ways and **30%** of respondents say that it should be measured in cubic litres. However, a **quarter (25%)** also say they don't really know how litter should be measured.

There is little difference between cities and more rural areas. At **37%**, people living in rural, but not remote, areas have a higher preference to measure in cubic litres.

	All respondents	Large city	Regional City	Regional town	Rural, but not remote	Rural and remote
Number of items of litter	15%	15%	13%	14%	16%	32%
<b>Volume of litter in cubic litres</b>	<b>30%</b>	<b>30%</b>	<b>30%</b>	<b>28%</b>	<b>37%</b>	<b>23%</b>
Weight of litter in grams	8%	9%	9%	8%	6%	0%
Average of number of items, volume and weight	18%	17%	18%	19%	16%	12%
None of these	4%	5%	4%	5%	3%	10%
<b>I really don't know</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>	<b>26%</b>	<b>22%</b>	<b>22%</b>
N (unweighted)	984	531	179	163	98	12*

*\*Low sample size*

Larger households would prefer measuring in cubic litres - **47%** of two parent families with 3+ children select this as their top preference and only **6%** say they "Don't know" versus **25%** for all respondents.

## 2. Will people pay extra to reduce litter?

**47%** say they are not prepared to pay any extra in rates or taxes to reduce litter by 15%. The majority who are not prepared to pay extra are aged 45+ years, with **62%** of 55-64 year olds saying they would not pay any more.

Younger people are happier to pay extra, especially 18-24 year olds:

- **23%** are happy to pay extra \$50,
- **13%** an extra \$75, and
- **16%** say they would pay an extra \$100.

25-34 year olds are also prepared to pay extra, with **20%** saying they would pay \$50. Although lower than older age groups, **38%** are not prepared to pay any extra.

	All respondents	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75 years +
\$25	20%	19%	14%	20%	<b>25%</b>	16%	19%	25%
\$50	14%	<b>23%</b>	<b>20%</b>	15%	9%	10%	12%	16%
\$75	5%	<b>13%</b>	<b>8%</b>	6%	3%	1%	3%	3%
\$100	9%	<b>16%</b>	8%	11%	8%	6%	7%	6%
\$150 or more	5%	6%	<b>12%</b>	3%	6%	4%	4%	1%
Not prepared to pay extra	47%	24%	38%	46%	<b>51%</b>	<b>62%</b>	<b>55%</b>	<b>50%</b>

N (unweighted)	978	107	147	111	200	123	155	135
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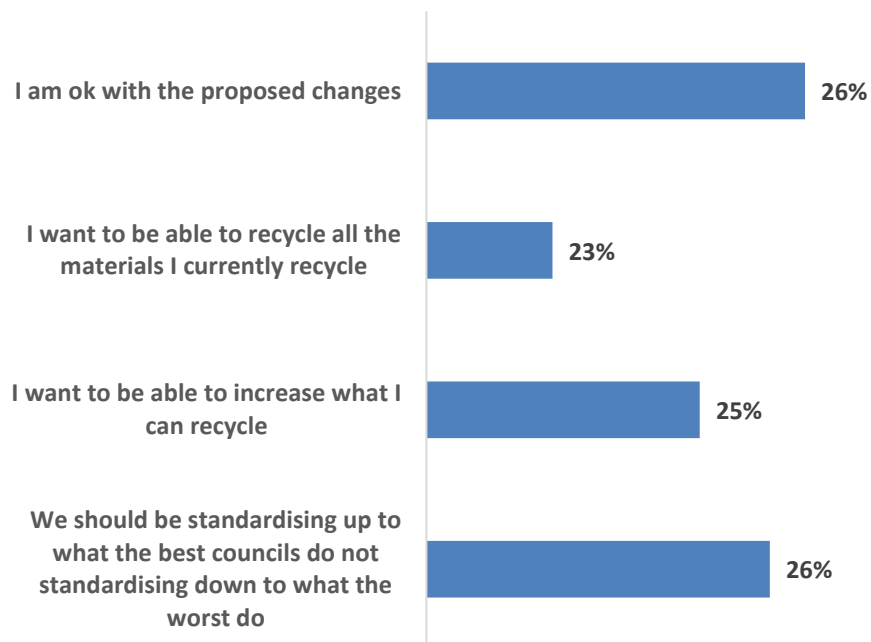
Household size has an influence on whether people are prepared to not pay extra to reduce litter:

- **46%** of two parent families with 1-2 children, and
- **45%** of two parent families with 3+ children are not prepared to pay extra in rates or taxes to reduce litter.

### 3. Changes to kerbside collections

The government is proposing changes to kerbside collections so that everyone in the country can recycle the same materials. **26%** say they are ok with the proposed changes and **26%** also saying that we should be standardising up to what the best councils are doing.

A quarter of respondents want to increase what they can recycle.



*All respondents = 976*

Younger age groups (18-34 year olds) say with the changes they still want to be able to recycle all the materials they currently recycle. Whereas **35%** of 35-54 year olds indicate that they would like to increase what they can recycle – this is significantly higher than **25%** of all respondents who would like to increase what they can recycle.

Older respondents believe that we should standardise recycling to what the “best councils” are doing.

Larger households are least likely to support the proposed changes, with **20%** saying they support it. These households are more likely to want to either stick with what they currently recycle or say they want to increase what they can recycle.



I am ok with the proposed changes	We should be standardising up to what the best councils do not standardising down to what the worst do
18-24 years 47% ↑	55-64 years 30%
25-34 years 31%	65-74 years 32%
Regional cities 21%	75+ years 34%
Two parent family, 3+ children 20%	Regional towns 32%
Want to be able to recycle all the materials I currently recycle	I want to be able to increase what I can recycle
18-24 years 32%	35-44 years 35% ↑
25-34 years 27%	45-54 years 29%
Regional cities 27%	Regional cities 30%
Regional towns 15%	Two parent family, 3+ children 31%
Two parent family, 3+ children 37%	

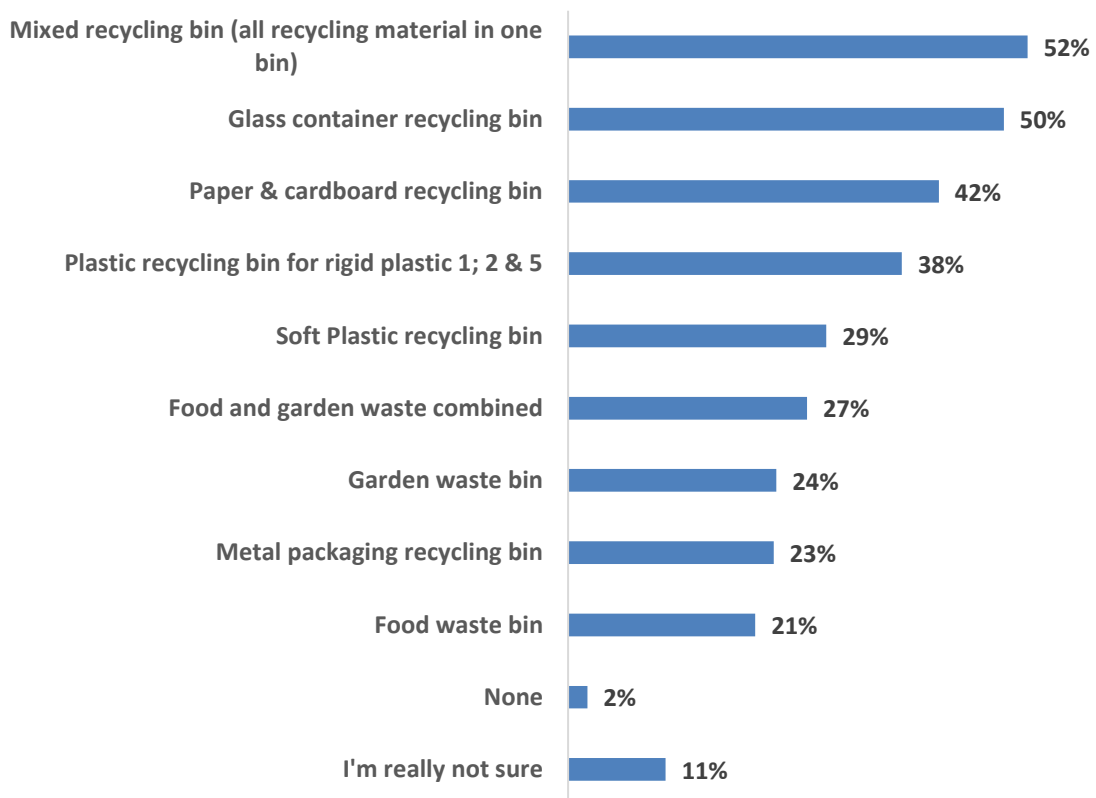
↑ = significantly higher than "all respondents"

#### 4. Kerbside Recycling bins at household

Just over half (**52%**) of respondents would like one mixed recycling bin taking all recycling materials. Half say they would also be happy with glass container bins. Other bin options start to become less popular, with **21%** saying they would be happy to have a food waste bin.

A food and garden waste bin would be more popular, with **27%** saying they would prefer it combined.

Although there is low interest overall for a food waste bin, it is a popular option among 35-44 year olds (**30%**) and 25-34 year olds (**32%**).



*All respondents = 983*

The interest in one recycling bin for all materials is higher among 35-54 year olds (**67%**) and larger families (**60%**).

**57%** of residents in larger cities would prefer one recycling bin. Rating second is **40%** saying they would be happy with a glass container bin. This is significantly lower than the **50%** of all respondents.

In Regional cities and towns people are happy to have more than one recycling bin and are less likely than people in big cities to want one bin for all recycling material.

	All respondents	Large city	Regional City	Regional town	Rural, but not remote	Rural and remote
Mixed recycling bin (all recycling material in one bin)	52%	57%	45%	51%	45%	36%
Plastic recycling bin for rigid plastic 1; 2 & 5	38%	31%	42%	50%	47%	47%
Paper & cardboard recycling bin	42%	35%	48%	52%	54%	45%
Glass container recycling bin	50%	40%	56%	66%	64%	57%
Metal packaging recycling bin	23%	17%	28%	27%	40%	40%
Food waste bin	21%	24%	18%	19%	19%	12%
Garden waste bin	24%	23%	26%	28%	20%	17%
Food and garden waste combined	27%	28%	23%	31%	23%	29%
Soft Plastic recycling bin	29%	24%	29%	38%	44%	31%
None	2%	1%	1%	4%	7%	10%
I'm really not sure	11%	14%	10%	5%	5%	33%

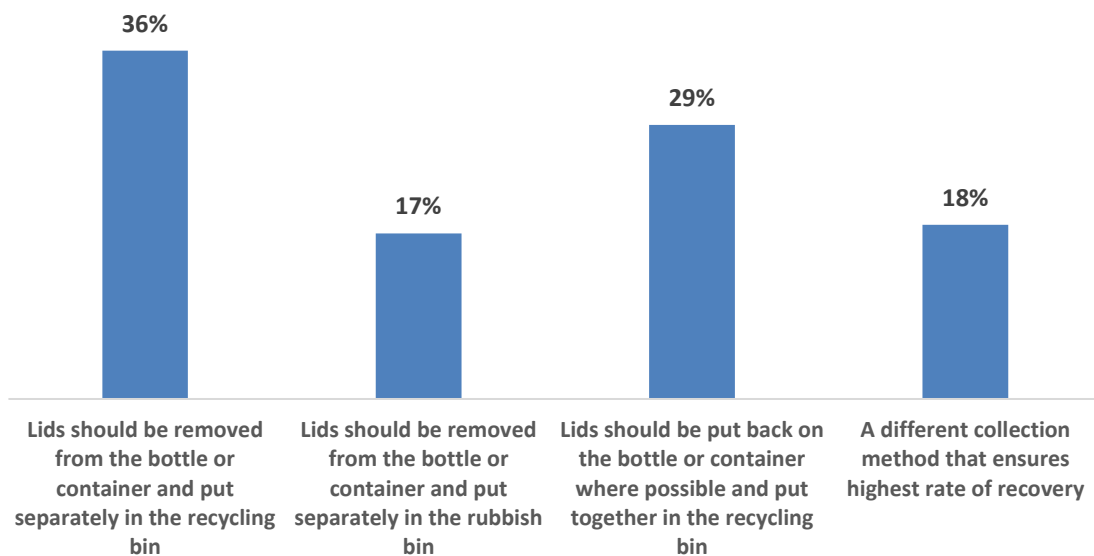
N (unweighted)	983	532	179	162	97	12*
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\*Low sample size

## 5. What should be done with lids?

There is mixed opinion about what to do with bottle/container lids. **36%** say they should be removed and put separately in the recycling bin. Whereas **29%** say they should be put back on the bottle/container and put together in the recycling bin.

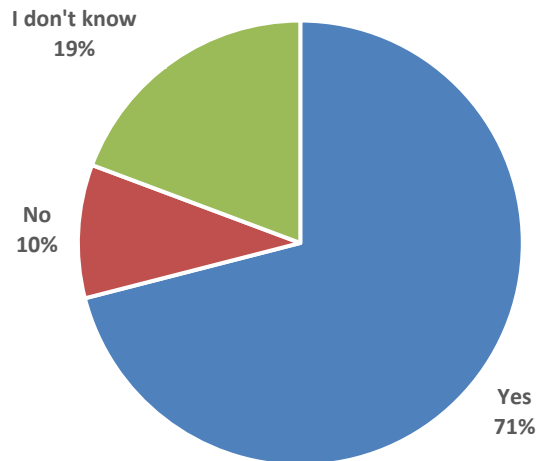
There is little difference across demographic groups in opinion on what should be done with lids.



*All respondents = 973*

## 6. Container Return Scheme

71% of respondents say they would support the Container Return Scheme. This equates to 2,815,200 people aged 18+ years.



All respondents = 977

Support is not as high among 25-54 year olds, with almost a quarter (24%) of 45-54 year olds saying they “don’t know” if they would support the scheme.

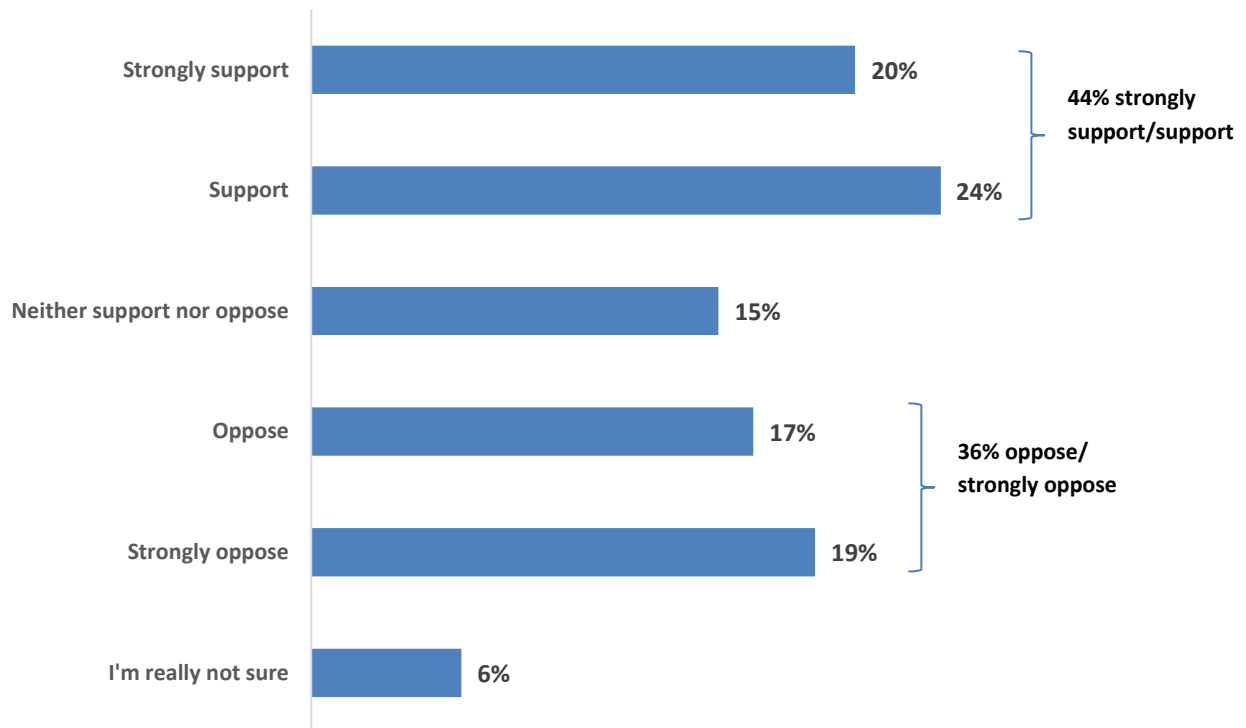
	All respondents	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75 years+
Yes	71%	75%	66%	69%	65%	76%	77%	73%
No	10%	9%	13%	9%	11%	7%	10%	8%
I don't know	19%	16%	22%	22%	24%	17%	13%	19%

N (unweighted)	977	107	145	112	200	124	155	134
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At 78%, support for the scheme is particularly high among couples who don’t have children at home.

## 7. Container Return Scheme – Supporting a cost increase

When told that the Container Return Scheme could increase the cost to buy a 24 pack of drinks by almost \$8, **44%** of respondents said they would strongly support/support it and **36%** would strongly oppose/oppose the scheme.



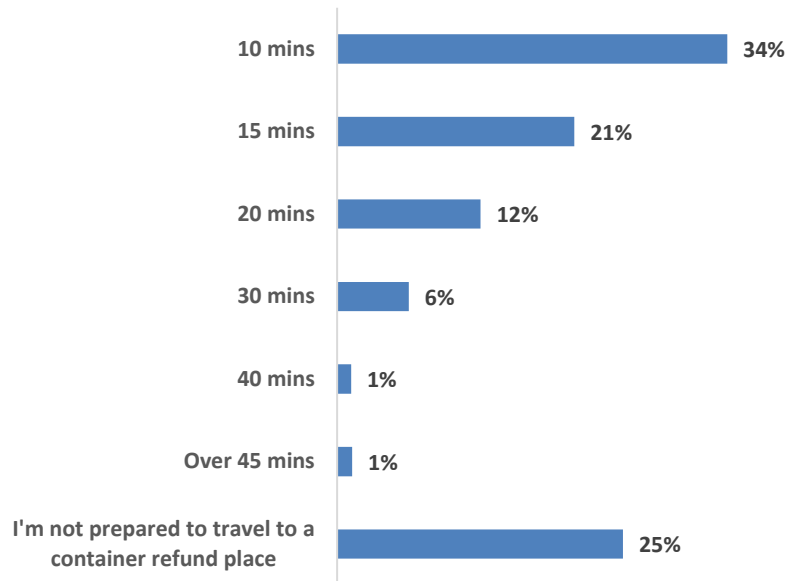
*All respondents = 977*

Support is particularly high among 18-24 year olds, with **59%** saying they strongly support/support the scheme. At **33%**, 55-64 year olds are the least likely to support the scheme.

Couples with no children at home are also more likely to support the scheme – **52%** strongly support/support it. Larger households with 3 or more children are less likely to support the scheme – **34%** strongly support/support.

## 8. How far will people travel to drop off beverage containers for a refund?

34% of respondents say they are prepared to travel up to 10 minutes to drop off containers for a refund. With 21% saying they would travel up to 15 minutes. 25% are not prepared to travel.



All respondents = 980

18-24 year olds are prepared to travel the furthest

- 25% will travel up to 10 minutes,
- 23% up to 15 minutes
- 24% up to 20 minutes

Older age groups are not as prepared to travel, with 30% of 45-54 year olds saying they will not travel.

	All respondents	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75 years +
10 mins	34%	25%	31%	37%	36%	35%	35%	36%
15 mins	21%	23%	23%	17%	17%	24%	24%	17%
20 mins	12%	24%	17%	15%	10%	7%	7%	10%
30 + mins	8%	14%	9%	14%	7%	6%	7%	7%
Not prepared to travel	25%	14%	20%	17%	30%	28%	27%	32%

N (unweighted)	980	107	147	111	201	124	155	135
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Across cities and in regional towns and cities, there is little difference in the number of people who are not prepared to travel.

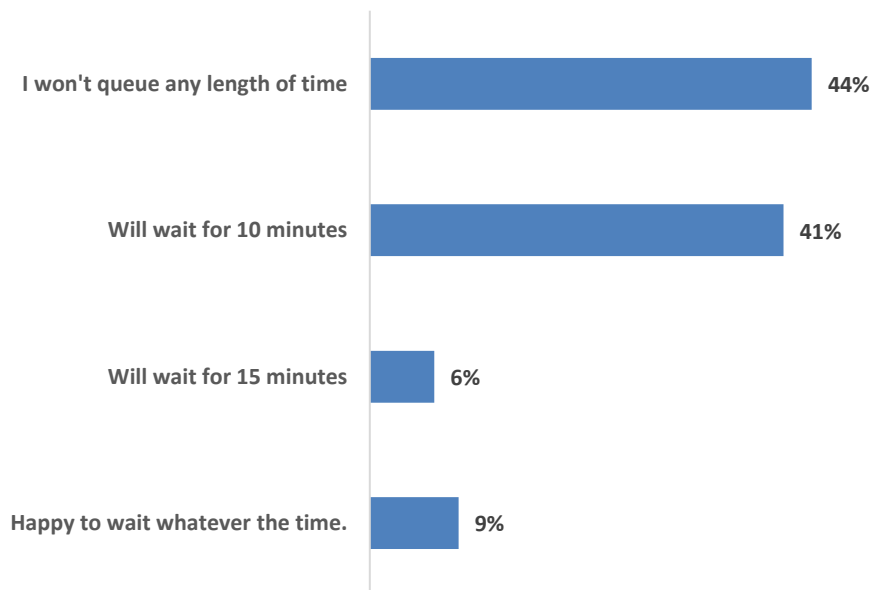
**40%** if people in regional towns are prepared to travel up to 10 minutes.

	All respondents	Large city	Regional City	Regional town	Rural, but not remote	Rural and remote
10 mins	34%	33%	35%	40%	31%	12%
15 mins	21%	20%	24%	19%	18%	5%
20 mins	12%	14%	12%	8%	12%	19%
30 mins	6%	7%	2%	4%	15%	0%
40 mins	1%	1%	2%	1%	0%	8%
Over 45 mins	1%	1%	0%	3%	2%	9%
I'm not prepared to travel to a container refund place	25%	25%	25%	25%	22%	48%
N (unweighted)	980	530	179	161	97	12*

*\*Low sample size*

## 9. How long will people queue to drop off beverage containers?

**44%** are not prepared to queue to drop off containers for a refund while **41%** will wait up to 10 minutes.



*All respondents = 977*

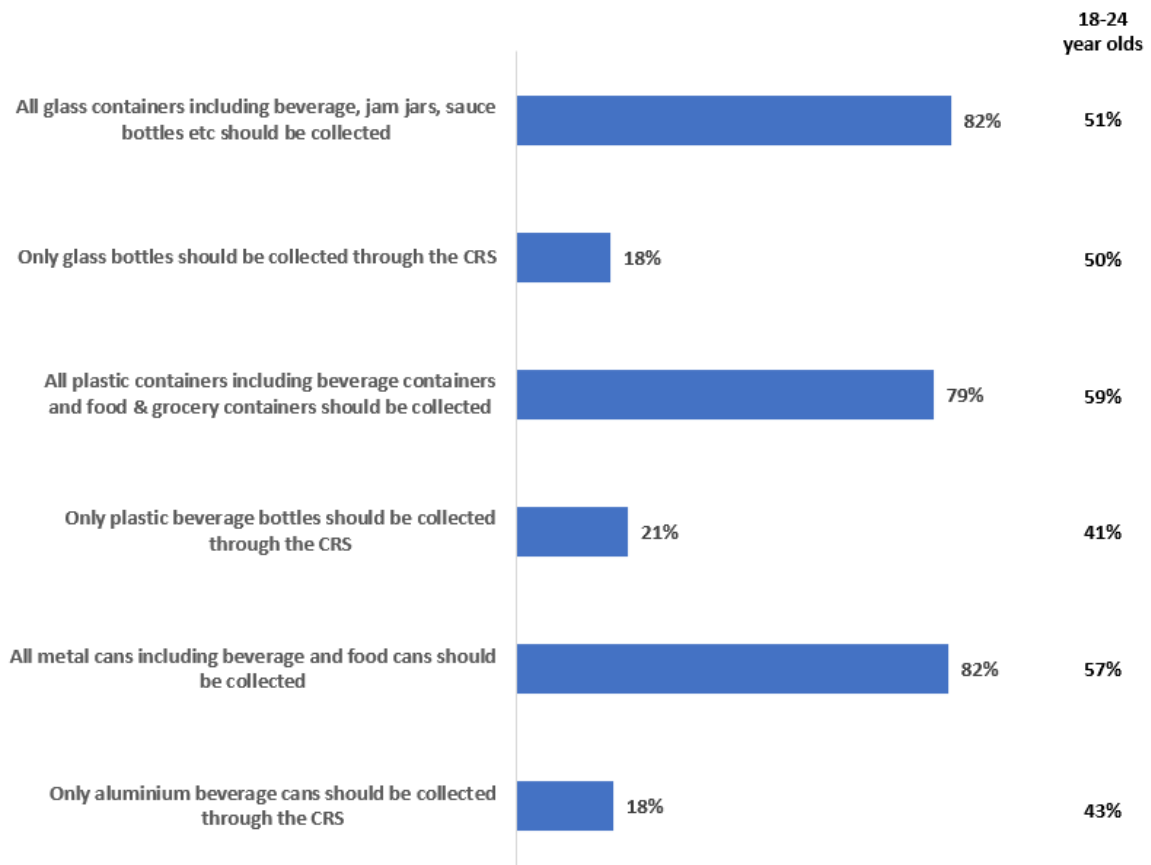


There is little difference across different demographics. Those who are less likely to queue are

- **52%** of 75+ year olds
- **51%** of families with 1-2 children.

## 10. How should different beverage containers be collected?

The overall feeling is that all containers (glass, plastic and metal) should be collected in the Container Recycling Scheme. The only group that shows a different viewpoint to this are 18-24 year olds.



## Appendix

### Sample

984 respondents from who are members of the Horizon's national adult panel and a third party panel, used for source diversity, responded to the survey between 7 April 2022 and 18 April 2022.

The sample is weighted on age, gender, personal income, ethnicity, employment and region and has a maximum margin of error at a 95% confidence level of  $\pm 3.1\%$  overall.

### Respondent comments

All comments from respondents are captured as entered by respondents and are available from the Horizon Research system.

### Contact

For more information about this survey or additional analysis, please contact Julia Ord on 027 706 8790, email [Julia.ord@horizonresearch.co.nz](mailto:Julia.ord@horizonresearch.co.nz).

### Appendix

A full set of data tables accompanies this report.

### Contact:

For further information in this report please contact Julia Ord, Manager, Horizon Research, email [julia.ord@horizonresearch.co.nz](mailto:julia.ord@horizonresearch.co.nz), telephone 027 706 8790.