

Packaging & Recycling Survey 2022

Prepared for
The Packaging Forum
March 2022

1. METHODOLOGY

Horizon Research surveyed 1,152 respondents nationwide between 2nd and 14th March 2022.

Respondents are members of the HorizonPoll national adult panel, the Horizon Research Māori panel online panel and two third-party research panels, representing the New Zealand population aged 18+ at the 2018 census, used for source diversity.

The survey is weighted by age, gender, educational qualification, ethnicity, personal income, and region 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 +/- 2.9%.

Results were compared with data from similar surveys conducted since 2011.

SUMMARY REPORT

Consumer Behaviours

90% of respondents put their recycling out for collection at kerbside, compared to 84% in 2018. Of those who do not have a kerbside collection, 30% put their recyclables in the rubbish bin.

The most recycled items at kerbside are plastic bottles (95%); paper & cardboard (92%); glass bottles and jars (85%) and aluminium cans (82%).

17% say they put their soft plastics in the household recycling bin. Those aged between 18 and 24 are more likely to do this.

52% respondents say the ability to recycle packaging is important in their decision to buy products (59% in 2018) 48% say it is important that packaging is made from recycled materials (56% in 2018). 61% say it is important that packaging can be recycled in New Zealand (67% in 2018).

69% respondents check the label on pack most or all of the time before putting in the recycling bin. 66% say it is easy or very easy to understand what can be recycled.

52% recognize the Australasian Recycling Label (ARL).

Public Place Recycling & Litter

42% of respondents said they had public place recycling bins in their area – down from 66% in 2021. This result indicates that **about 1.66 million adults** have public place recycling in their area.

New colour-coded bins

50% of respondents, equivalent to around **1.97 million adults**, have seen the new Colour Coded Recycling and Rubbish Bins – consistent with 2021. **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: Dunedin (65%); Gisborne (82%) Rotorua (72%); New Plymouth (86%) Tauranga (67%).

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

Compared with the overall result of 50%, 70% of 18-24-year-olds had seen the bins and 66% of those aged 25-34 years.

Brand Awareness

The “*Be a Tidy Kiwi*” brand was recognised by **76%** or around three million adults – (83% in 2020; 92% in 2019; 87% in 2018; 84% in 2017. Awareness is greatest amongst those aged between 45 and 54 (83% and 55-64 (81%)

This compared to 70% awareness of Keep New Zealand Beautiful; 41% awareness of Love NZ (up from 34% in 2021) and 22% had heard of Sustainable Coastlines.

Perspective on Litter

79% now say there is little or no problem with litter where they live and the number of people saying there is a problem has reduced continually since 2018. **21% of respondents** said there was a problem with litter which shows a significant reduction from 34% in 2021; 44% in 2019 and previous results in 2017 and 2018.

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

16% of people said they would not walk more than 10 metres to find a rubbish or recycling bin (23% in 2021 and 30% in 2017).

38% of people said they would walk more than 40 metres, up from 29% in 2021 and significantly up from 23% in 2018 (826,969 adults).

24% said they would tell someone to pick it up if they saw someone drop litter in the street (38% in 2019) while **32%** said they would pick litter up themselves (36% in 2019).

Women were more likely to pick up the litter themselves (37%) than men (27%).

Home Composting

51% of respondents said they have a compost bin at home for their garden waste and food scraps (50% in 2021; 51% in 2020). Of these **30%** said that they put compostable products, like compostable packaging, in their home compost bin (60% in 2020).

By household type, the likelihood of having a home compost bin is highest among two parent families with three or more children at home (64%) and couples with no children at home (57%). Lowest use is by one parent families with three or more children (27%).

Possession of a home compost bin is consistent across all household income groups except only 34% households earning more than \$200,000 per year.

Soft Plastics Recycling

Nationwide **55%** of respondents have heard that they can recycle their soft plastic bags and packaging at supermarkets and other stores. **Awareness has increased from 38% in 2021 and is back to 2018 awareness levels. Awareness is highest amongst people aged between 18 and 44.**

Seen and used soft plastic recycling bin

47% of respondents have seen a soft plastic recycling bin. This equates to around 1.86 million adults. This compares with 44% in 2021 and 44% in 2020.

23% of all respondents say they have recycled their soft plastic bags at participating stores. This has remained consistent since 2020.

In the regions where soft plastic collections are available, recognition is as follows:

- **Auckland, 66%** of respondents said they had heard of the programme and 62% said they have seen one of the soft plastic recycling bins in stores. 38% say they have used the service (29% in 2020).
- **Christchurch, 61%** of respondents said they had heard of the programme and 59% said they have seen one of the soft plastic recycling bins in stores. 25% say they have used the service which restarted in February 2021.
- **Hamilton, 65%** of respondents said they had heard of the programme and 60% said they have seen one of the soft plastic recycling bins in stores. 33% have used the service (30% in 2020).
- **Wellington, 64%** of respondents said they had heard of the programme and 73% said they have seen one of the soft plastic recycling bins in stores. 26% have used the service (21% in 2021)

Awareness about Recycling

Glass bottles & Containers: 79% respondents recycle their glass bottles or jars at the kerbside. 20% say they were aware that 75% of glass is recycled in New Zealand

Paper & Cardboard: 67% people think that paper and cardboard can be reused in NZ with some exported. 20% people were aware that the paper recycling rate is between 61% and 70%. 56% thought less than 60% of all paper and cardboard is recycled. There is 78% support for a collection scheme for all liquid paperboard milk and juice cartons.

Metal Packaging: Only 26% of respondents have ever taken aluminium cans or metal packaging to a metal recycler. This rises to 31% for those with a household income between \$30,000 and \$50,000 per year and is lowest for those with a household income between \$100,000 and \$150,000 (20%).

Awareness of Industry Funded Services

Only **11%** of respondents know that manufacturers and retailers fund the soft plastic recycling service. 69% don't know and 19% think councils pay for it.

14% are aware that there is an industry funded glass recovery scheme.

Funding the Recovery of Packaging

34% respondents would prefer to fund recovery and recycling through rates paid to local councils (33% in 2017; 35% in 2016; 29% in 2015, 35% in 2014; 37.1% in 2013; 45.3% in 2012; 38% in 2011; 29.7% in 2010).

26% believe that the Government should fund this through tax (22.5% in 2017; 24% in 2015, 23% in 2014; 19.9% in 2013; 20.6% in 2012; 16.2% in 2011 and 33.1% in 2010).

Those saying there should be an extra price on all goods to cover the cost of recovering packaging has stayed consistent at **20%** (21% in 2017; 23% in 2015, 21% in 2014; 29.9% in 2013).

73% respondents say that kerbside collection suits them best (up from 65% in 2018 when we last asked this question) with **13%** saying they would pay an extra charge for every container purchased and drop them off at a collection point for a refund (16% in 2018).

If a charge were made on containers like bottles at the point of purchase to help fund recovery **73% of people** said they would not be willing to pay more than 10 cents per container.

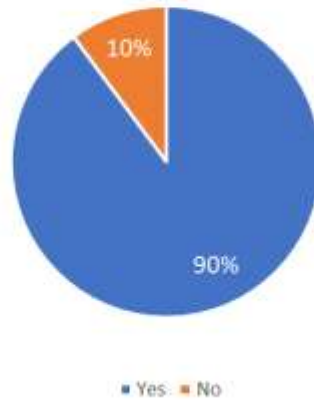
70% of people say they think a CRS is a good idea. This reduces to **37%** when they hear that the CRS would increase the cost to by a 24 pack of drinks by almost \$4 per pack.

92% of people say they would prefer to have a kerbside solution which is funded by industry.

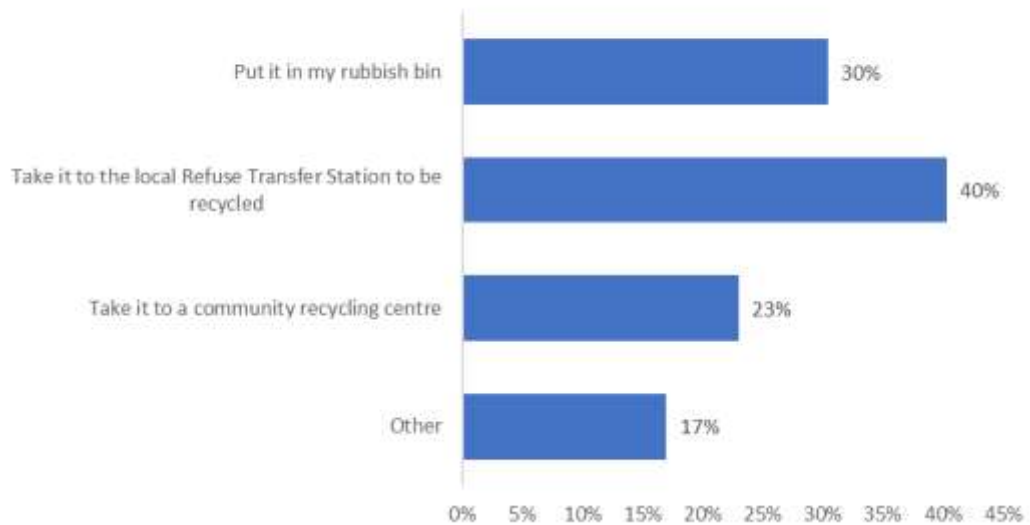
Results

Consumer Behaviours

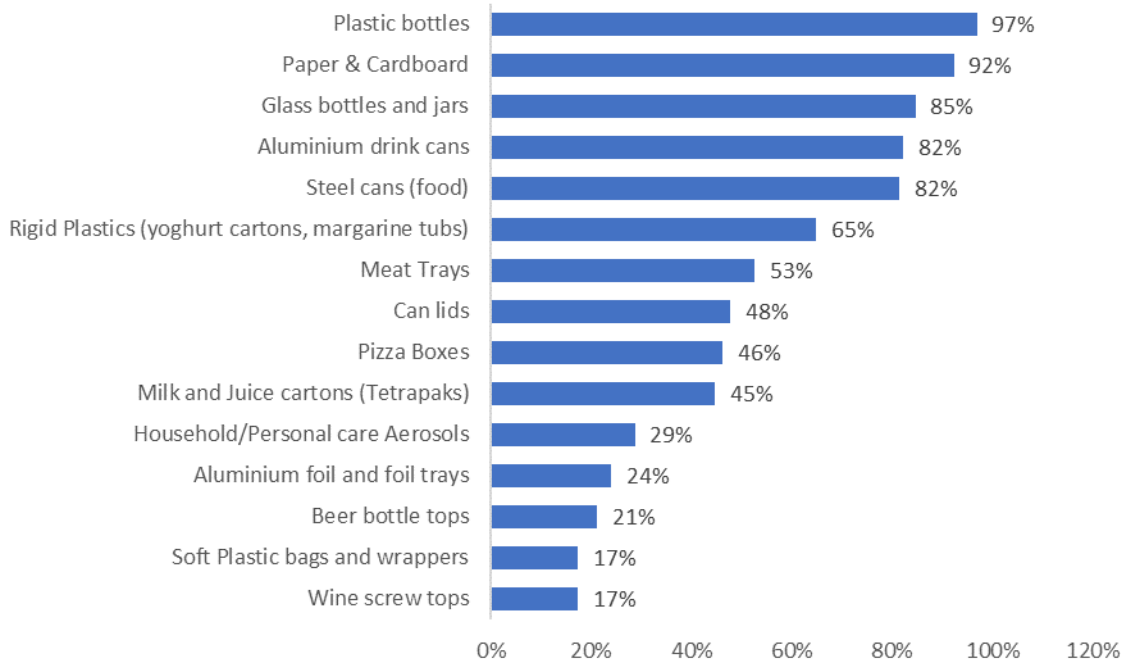
Do you put your recycling out for collection at kerbside?



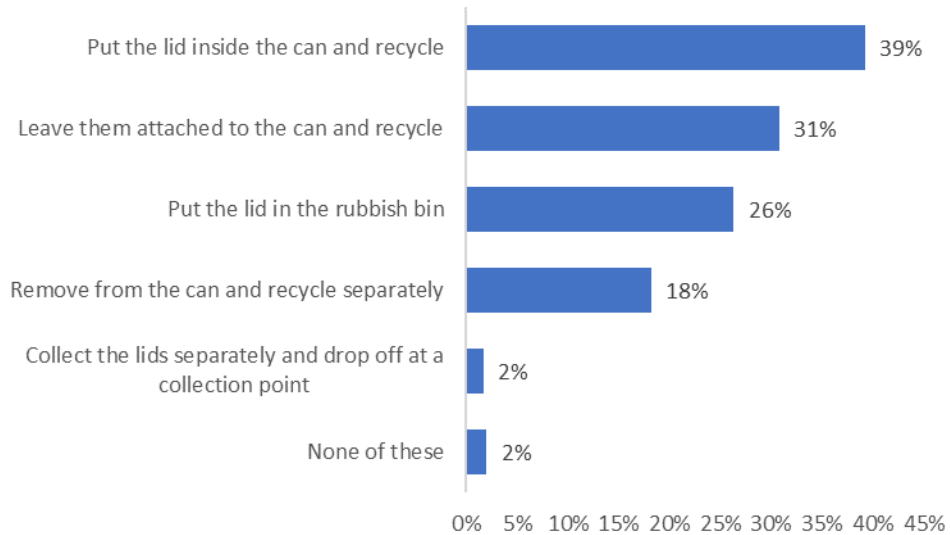
You said you did not have a kerbside collection for your recycling. What do you do with your recycling?



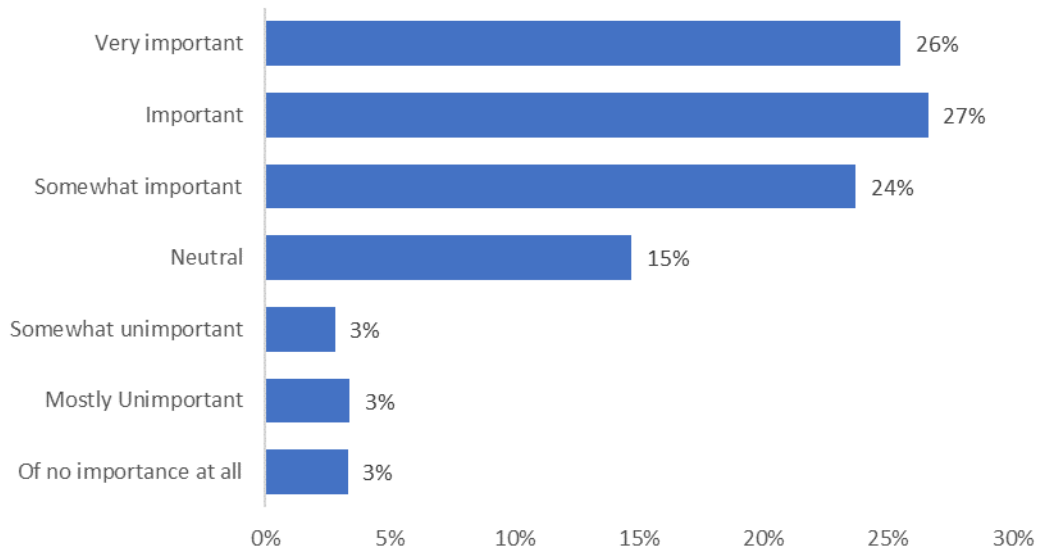
What do you put in your recycling bin at kerbside?



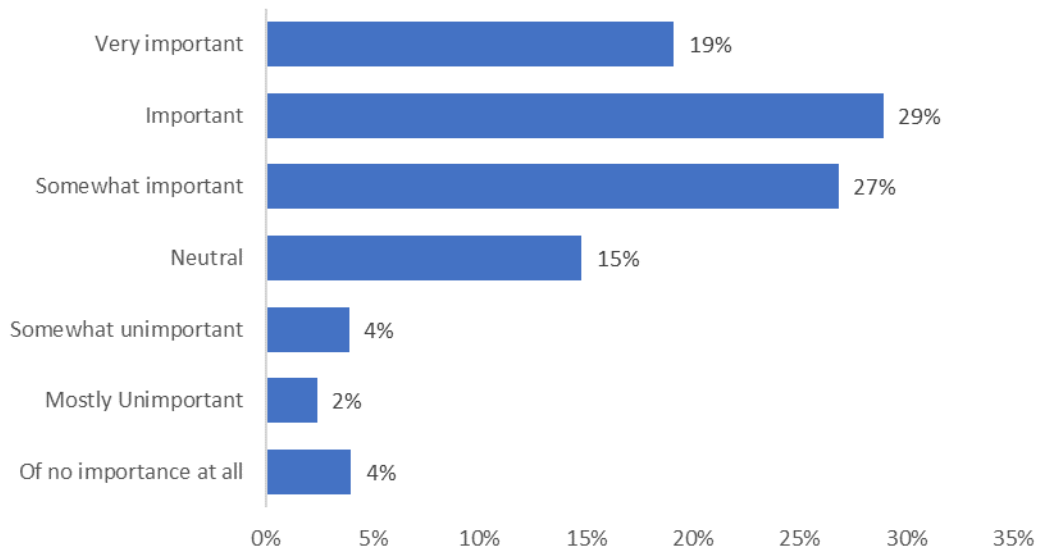
What do you do with the metal lids from cans?



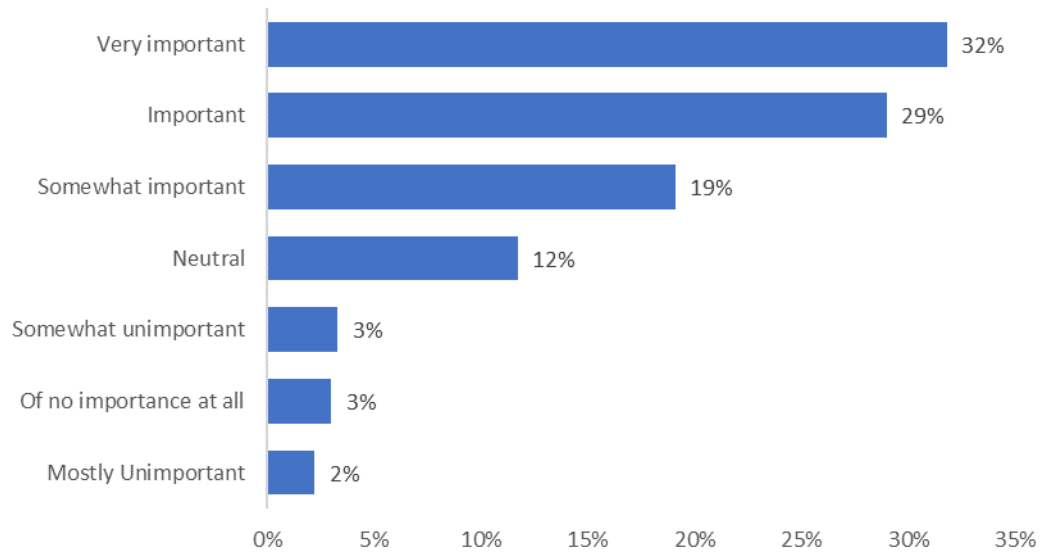
How important is being able to recycle packaging in your decision to buy products?



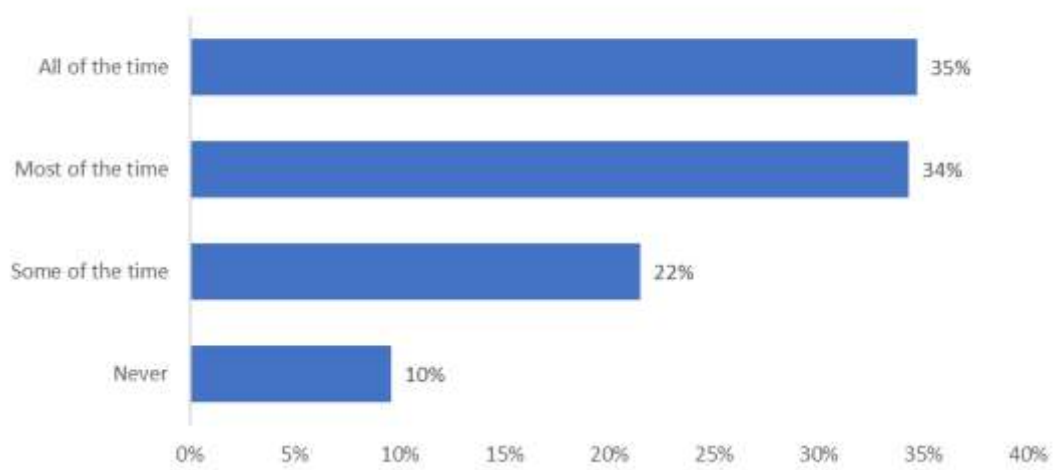
How important is it to you to buy packaging which is made from recycled materials?



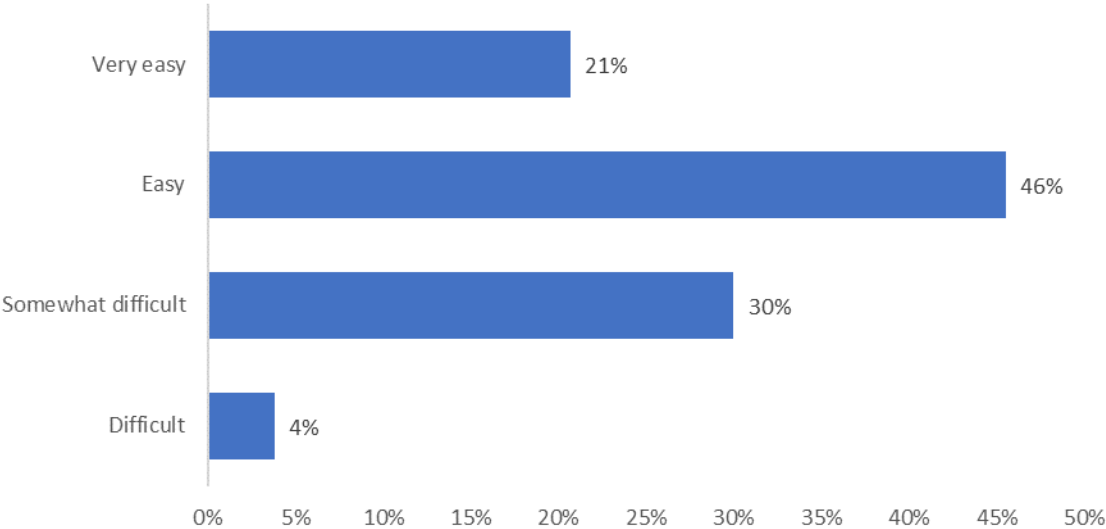
How important is being able to buy packaging that can be recycled in New Zealand?



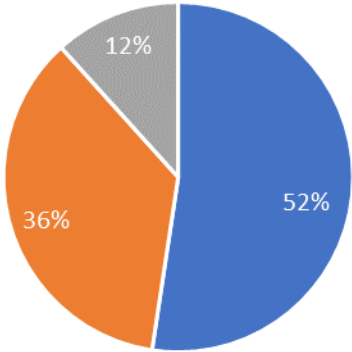
Before you put it in a recycling bin, do you check the label on packaging before putting in the recycling bin?



How easy is it to understand what items can be recycled?



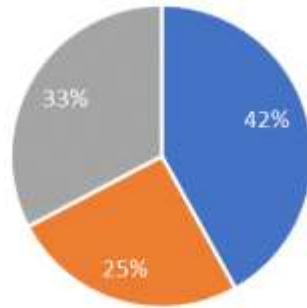
Have you seen this type of label on packaging?



■ Yes ■ No ■ Don't know

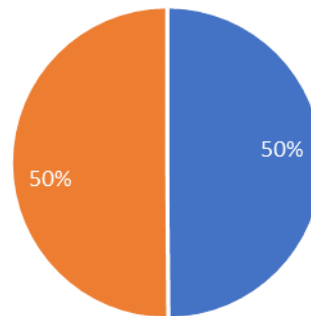
Public Place Recycling & Litter Bins

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



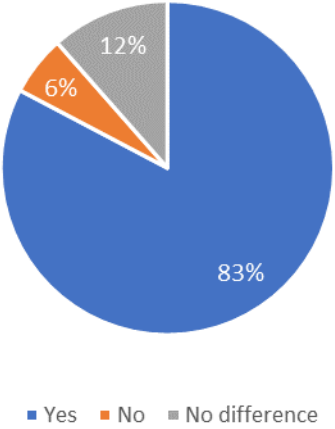
■ Yes ■ No ■ I really don't know

Have you seen these Colour Coded Recycling
and Rubbish Bins?



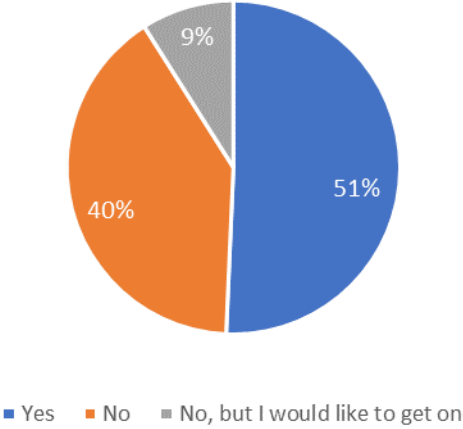
■ Yes ■ No

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

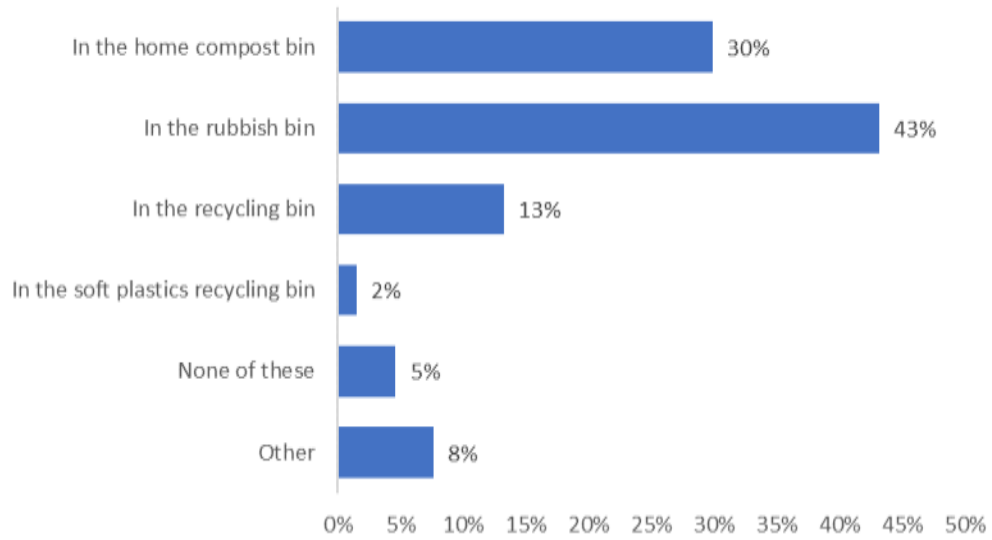


Composting

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

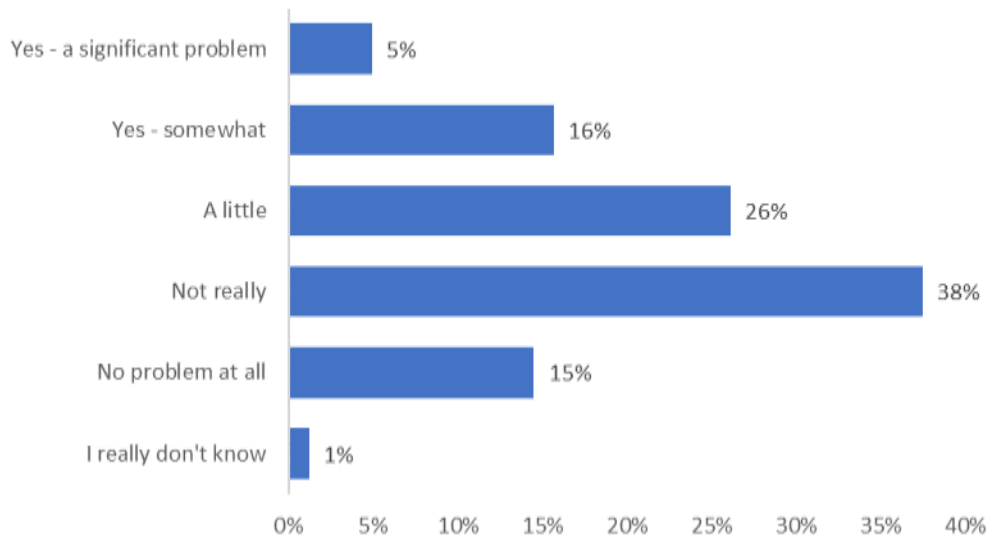


How do you dispose of compostable packaging?

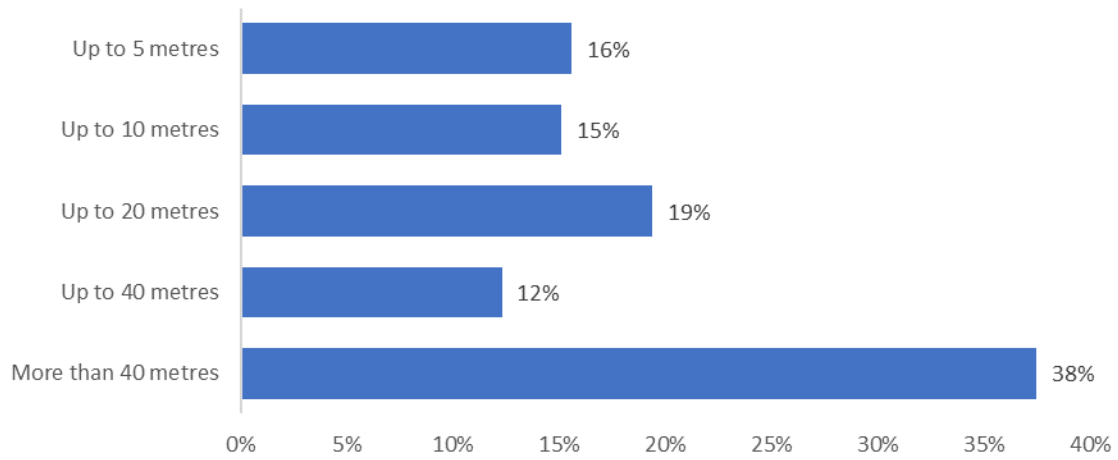


Litter in your area

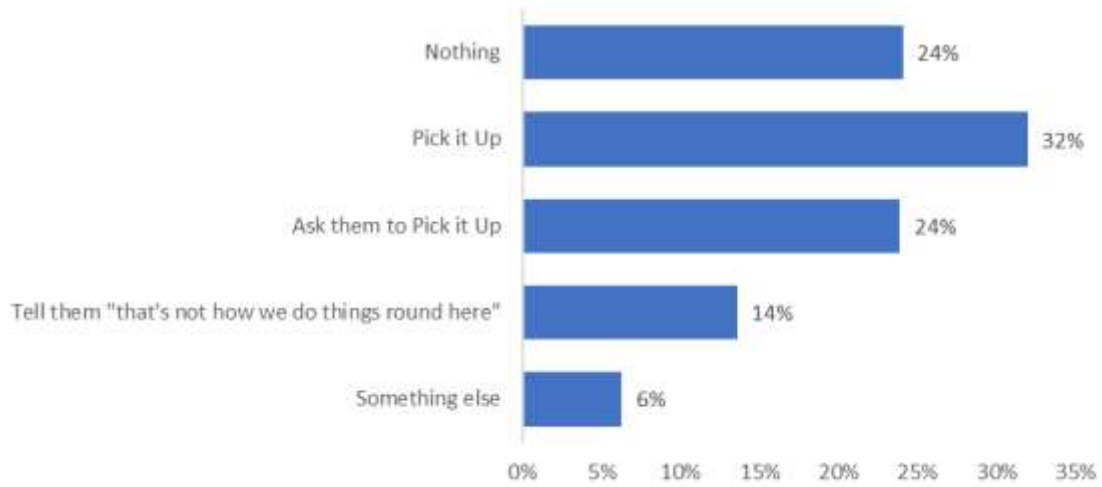
Is there a problem with litter in your neighborhood?



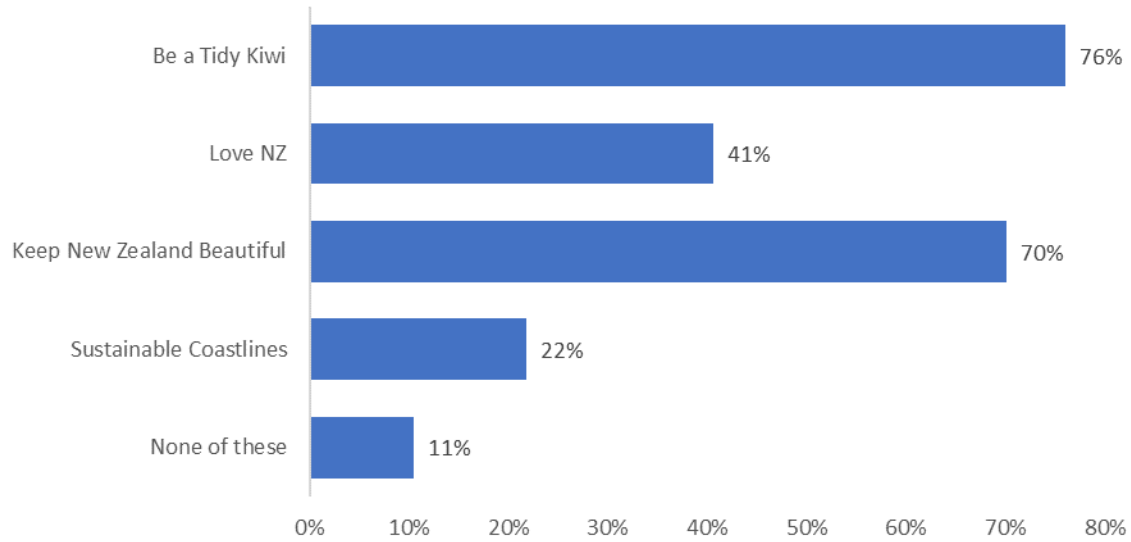
In general, how far would you walk to find a rubbish bin or a recycling bin?



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

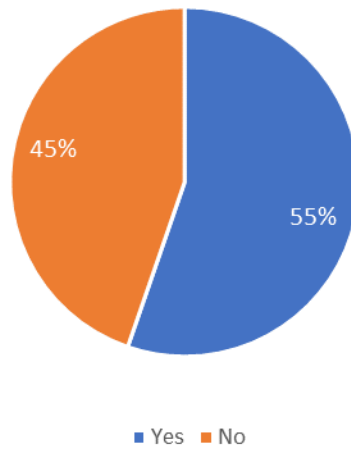


Which of the following brands have you heard of, if any?

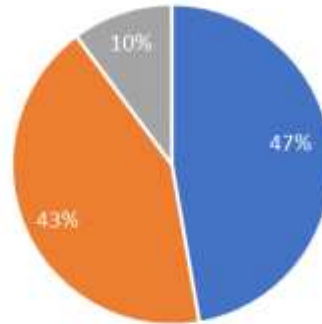


Soft Plastic Recycling

Have you heard that you can recycle soft plastic bags and packaging at supermarkets and other stores in New Zealand?

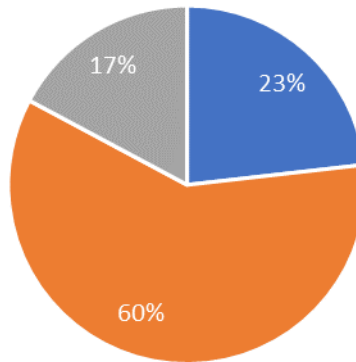


Have you seen one of the soft plastic recycling bins at supermarkets and The Warehouse stores?



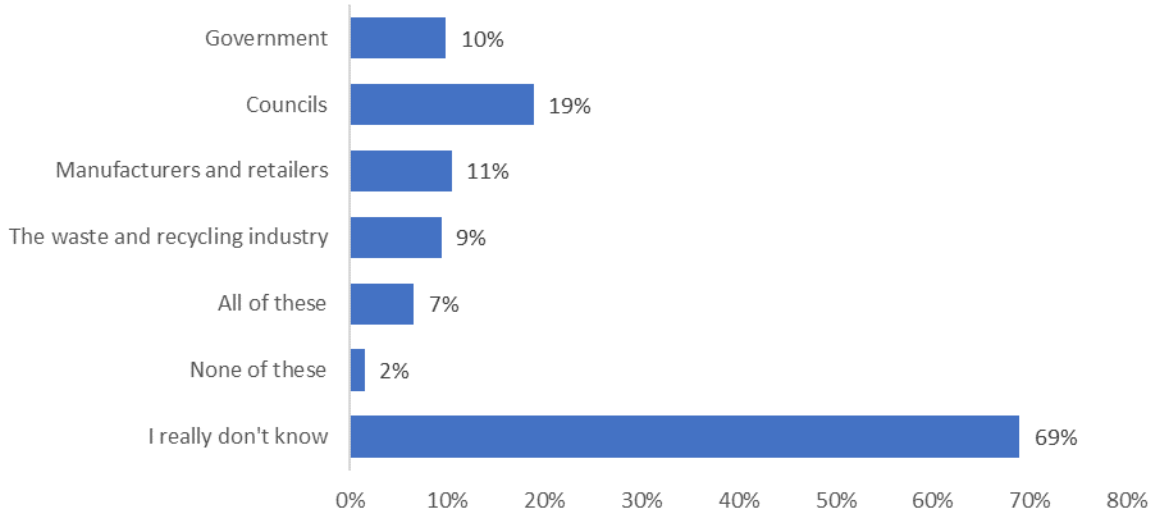
■ Yes ■ No ■ I'm really not sure

Have you recycled your soft plastics bags at your local store?



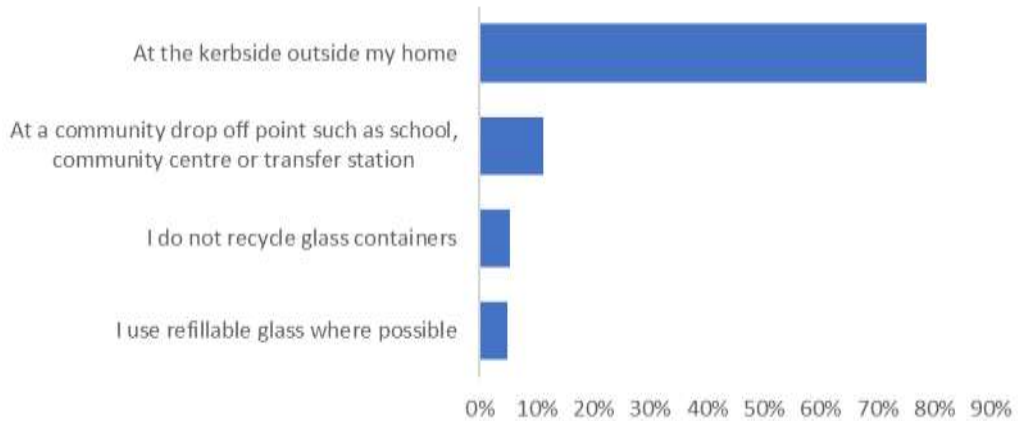
■ Yes ■ No ■ There is no soft plastic recycling bin at my local store

Which of these, if any, fund the soft plastic recycling service?

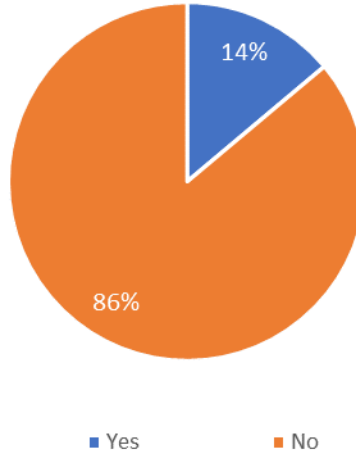


Glass Recycling

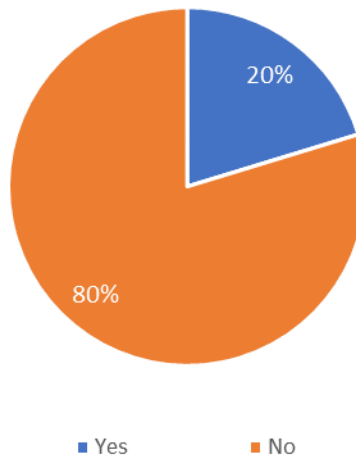
How do you recycle your glass bottles or containers which you use at home?



Are you aware there is an industry funded glass recovery scheme in NZ?

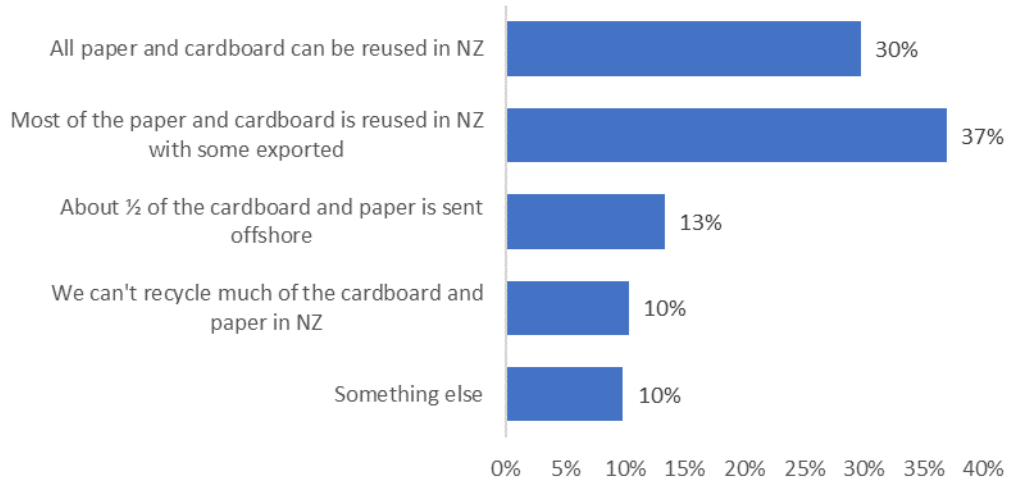


Are you aware New Zealand recovers 75% of glass and this is recycled in New Zealand?

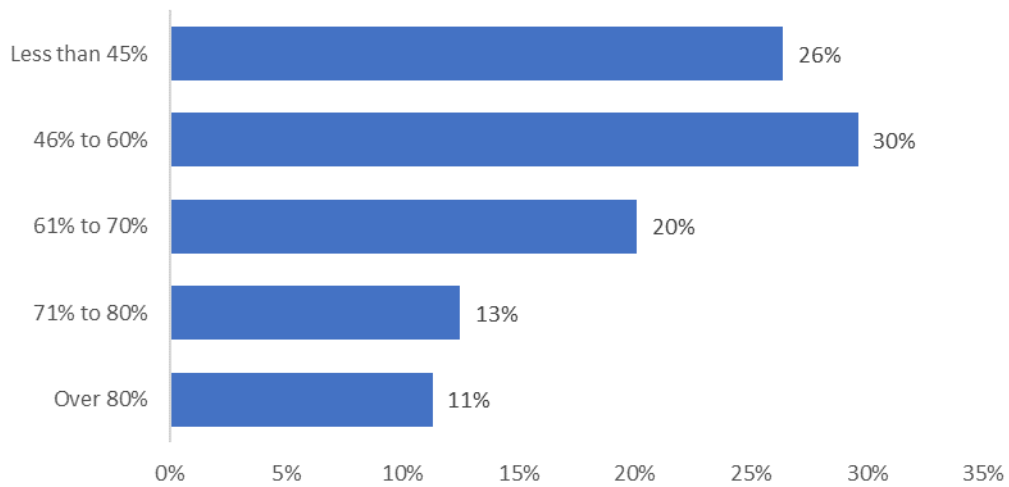


Cardboard and Paper Packaging

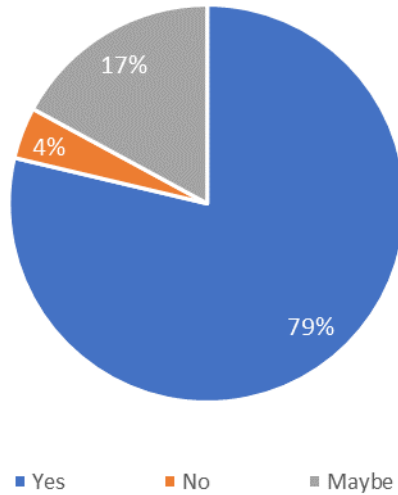
What do you understand about paper recovery in New Zealand?



How much of the paper and cardboard in New Zealand is recycled?

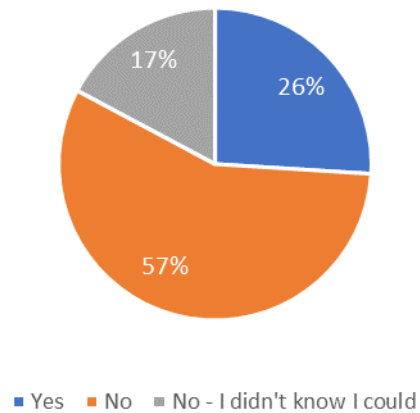


If there was a collection scheme for all milk and juice cartons, so that all this material was recycled rather than going to landfill, would you support such a scheme?



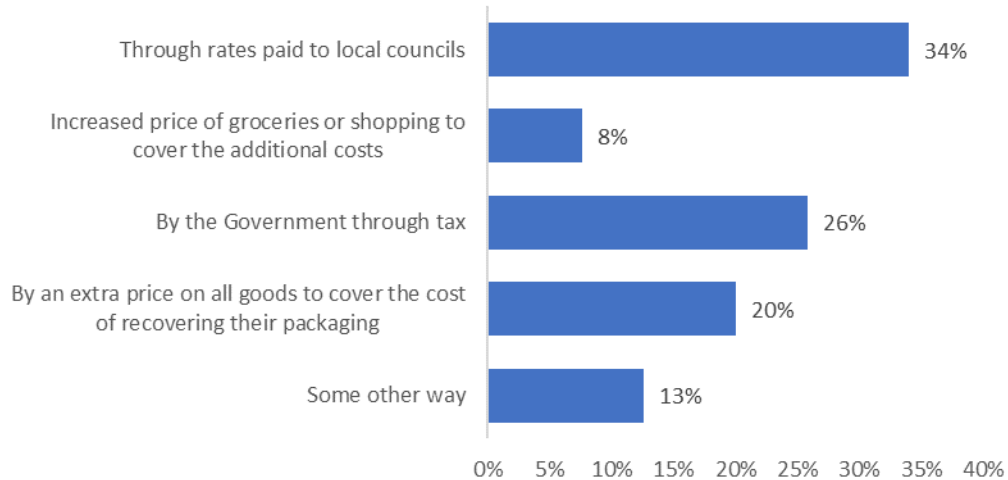
Metal Packaging

Have you ever taken your aluminum cans or other metal packaging to a metal recycler for recycling?

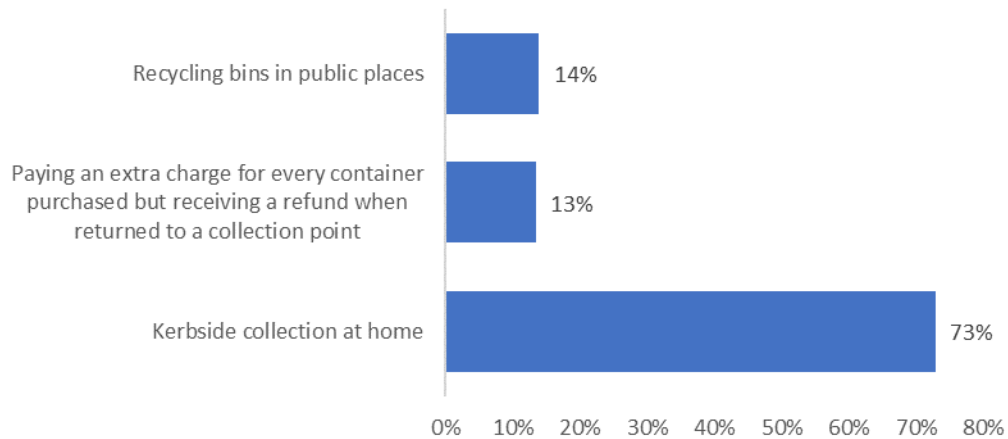


Funding the recovery of packaging

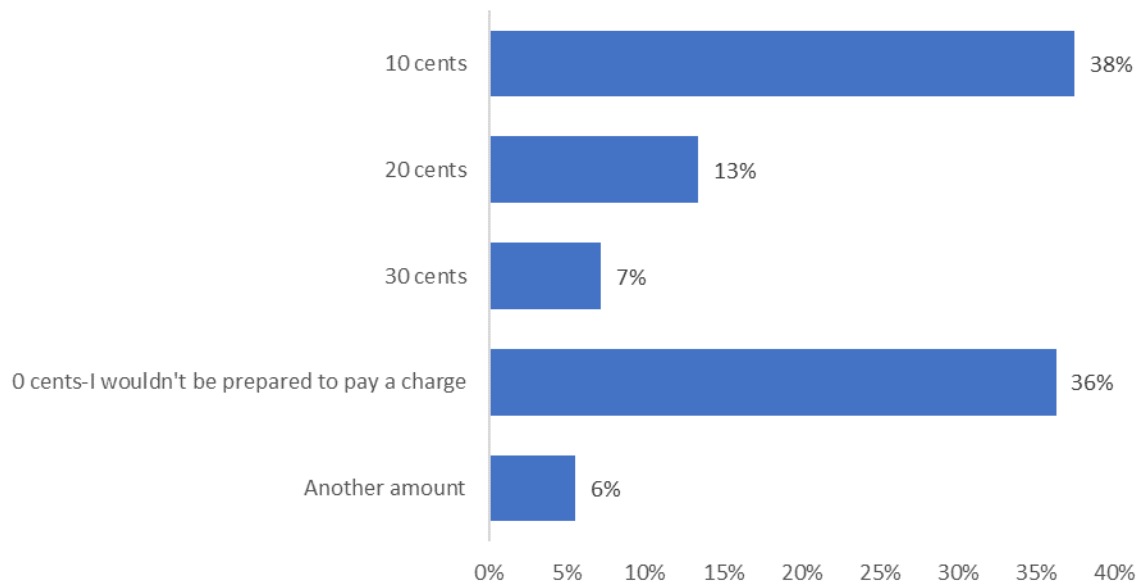
How do you think recycling of packaging should be funded in New Zealand?



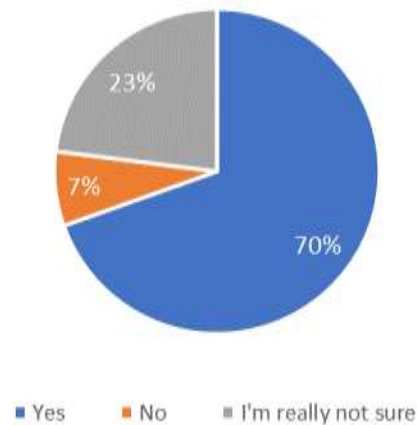
If they were available for you, which of these ways of recycling food and beverage containers would suit you best?



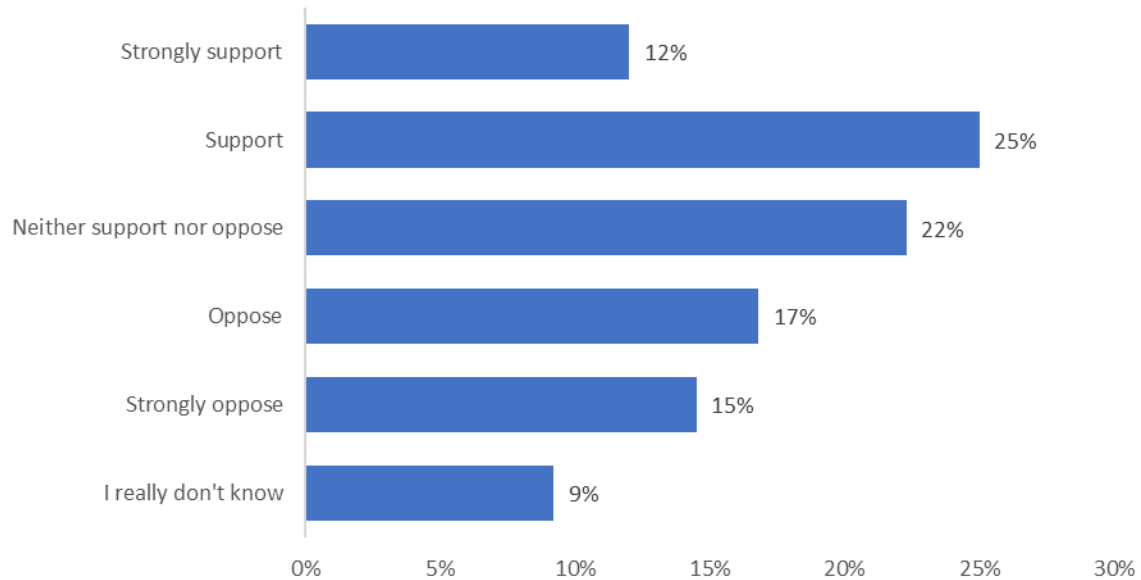
Suppose a charge was made on containers at the point of purchase to help fund recovery. Which of the following charges per container at point of sale would be acceptable to you?



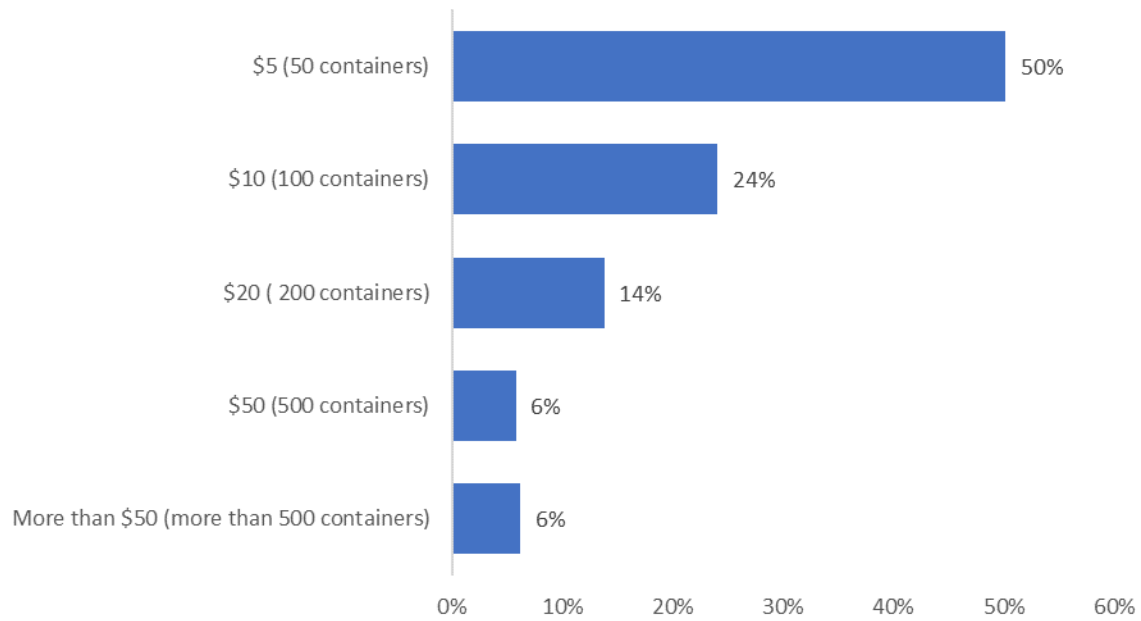
The Government Is considering a Container Return Scheme for NZ which will capture all beverage containers. Do you think this is a good Idea?



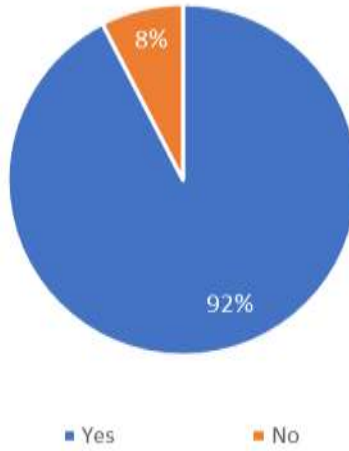
The cost of the Container Return Scheme will increase the cost to buy a 24 pack of drinks by almost \$4 per pack. Knowing this, would you support or oppose a container return scheme?



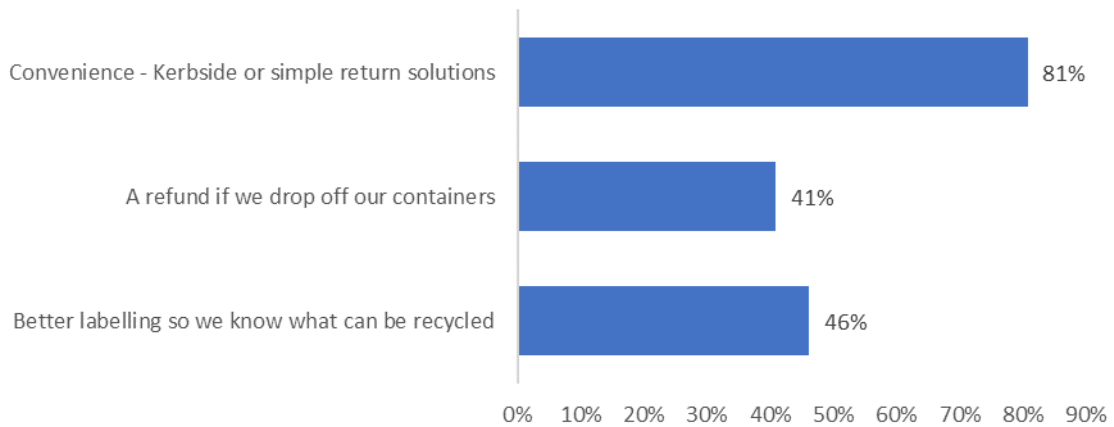
It is proposed that the return deposit would be 10 cents: What value would you consider it worth taking your containers to a collection centre?



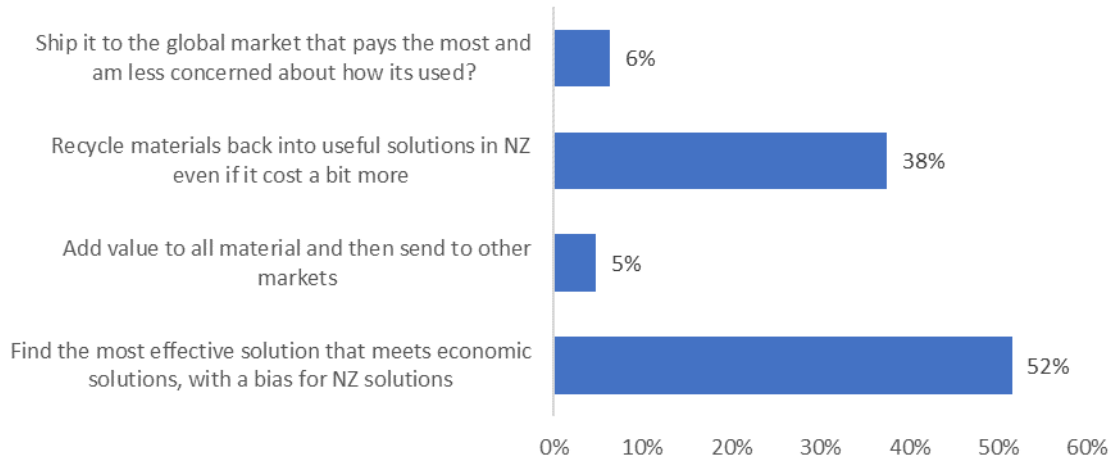
If a kerbside solution collected materials separately at kerbside and is funded by industry, meaning the goods could be fully recovered and reused, at a lower cost to you, would you prefer this approach?



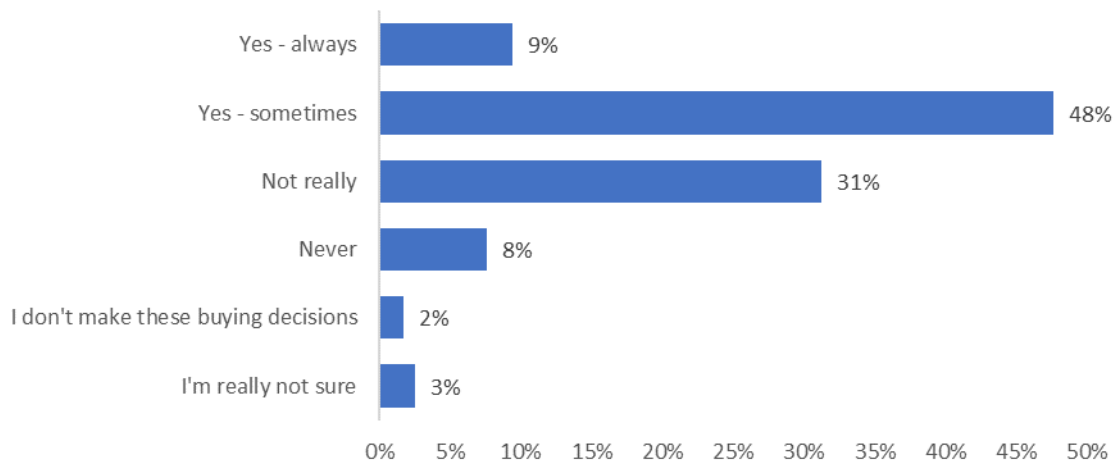
Which of these would most help you make the right decisions to improve recycling in NZ?



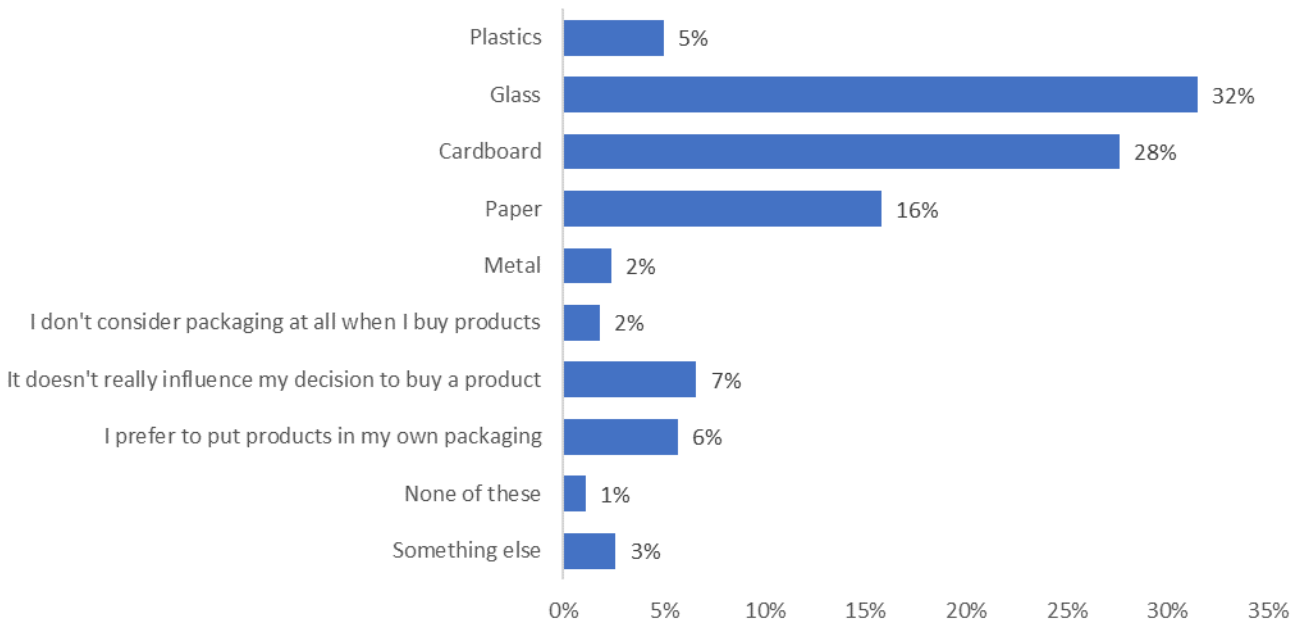
Which of these is most important to you with recycling solutions for NZ?



Does the material a product comes in affect your decision to buy it?



When you're buying which of these packaging materials do you most prefer?



Contact

This report was prepared by Lyn Mayes for the Packaging Forum with assistance from Horizon Research.

To discuss this research with Horizon please contact Graeme Colman, principal, email gcolman@horizonresearch.co.nz, telephone 021 848 576.

Appendices

Demographic tables results for all 41 questions asked in this survey are appended to this report, along with the full questionnaire.