Plastics Recycling Consumer Insight Research

An International Comparison

PlasticsEurope
Association of Plastics Manufacturers

RECOUP
RECycling Of Used Plastics Limited

Contents

Research Undertaken By ICARO

Background and Approach

Consumers play a critical role in the success of any plastic packaging recycling system. The effective engagement of consumers is also recognised a key barrier to improving the quantity and quality of material collected for recycling, whether in or out of the home. It is also recognised that consumer recycling engagement often occurs across multiple platforms and sectors, and is not always co-ordinated or aligned. This work takes the first steps in developing an international picture of consumer recycling views with a focus on plastics.

The survey was designed by consumer engagement experts in agreement with the funding partners to cover a range of relevant issues. The data was collected using an online survey with nationally representative samples. A total of 4119 consumers were surveyed during March and April 2017. This followed protocols to ensure quotas were met on age, gender and region to ensure representative datasets were obtained and the country specific datasets are comparable.

A priority was to obtain up to date feedback from consumers on the key barriers to recycling their plastics. This includes reasons for not recycling plastics, and acceptability of plastic waste management options used.

Discovering whether consumers were aware of, and could explain some of the popular environmental terms was also a focus, alongside the willingness to pay extra for sustainable products, and consumer perception of what currently happens to their plastics once collected.

Wider questions were asked relating to plastic as a material with both positive and negative control statements provided.

Using the UK as a baseline, Poland was also selected given that it has emerging opportunities for plastic recycling but with more limited current infrastructure. Germany was also selected as a well developed system with established recycling and energy from waste infrastructure.

Key Findings

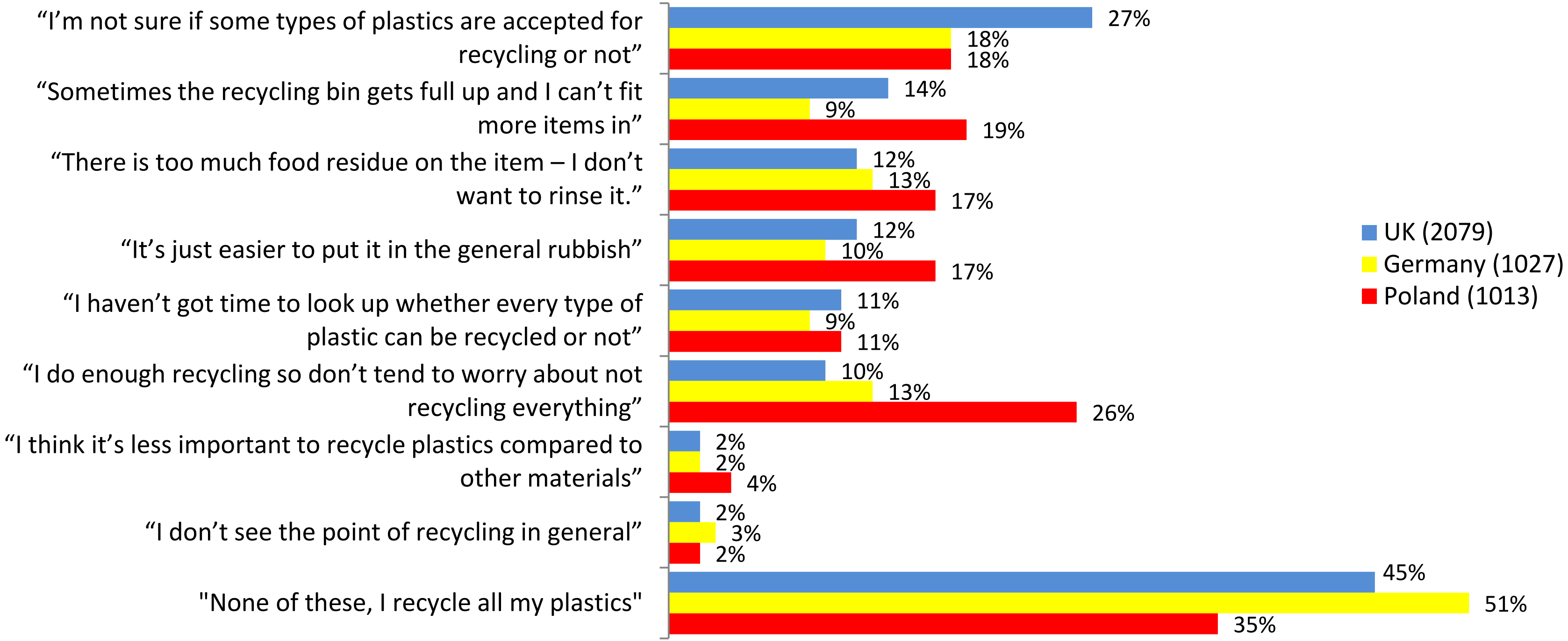
Barriers to recycling

Why Don’t People Always Recycle Their Plastics ?

Uncertainty about what types of plastics are accepted for recycling is a key barrier across all three countries, and the most commonly identified issue in Germany (18%) and the UK (27%). Poland also identified the same issue, but by contrast, consumers also commonly cited other barriers as well.

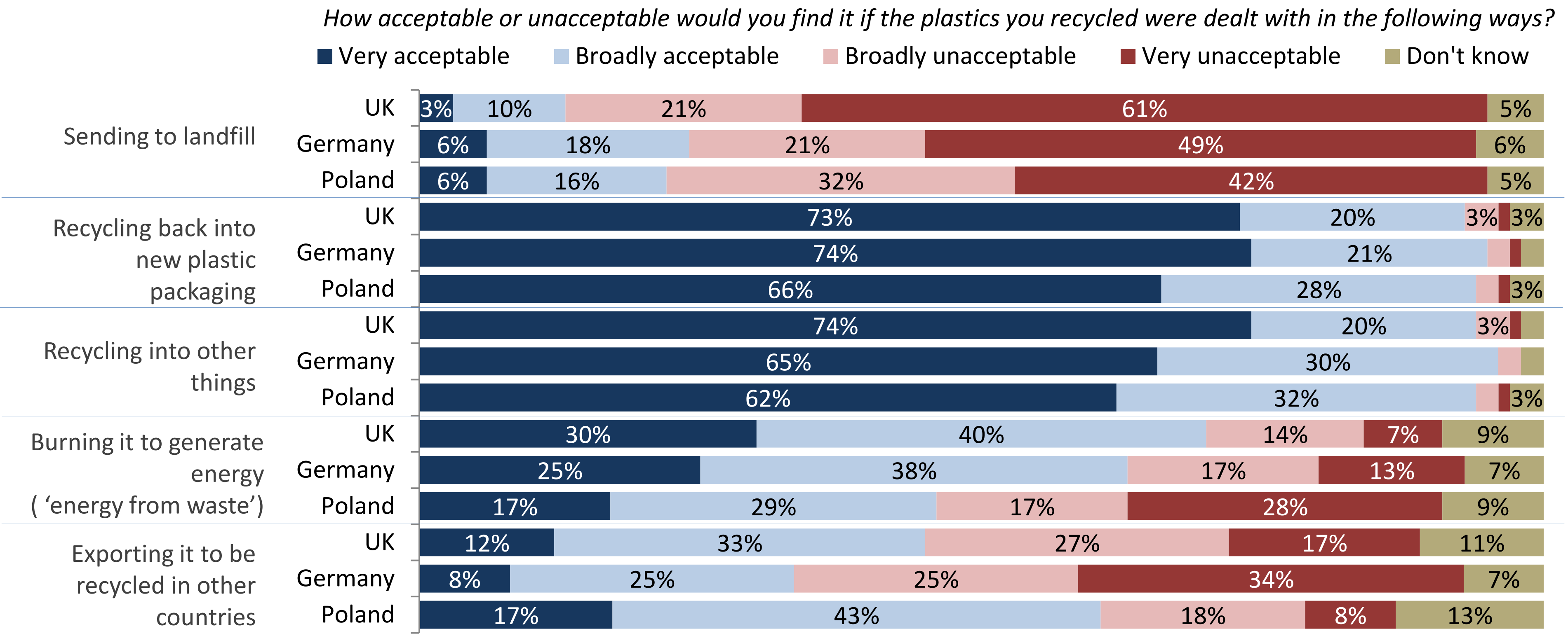
More significant differences can be observed when consumers responded with ‘none of these barriers apply as I recycle all my plastics’. 51% of households in Germany say that they recycle all their plastics - compared to 45% in the UK and 35% in Poland.

Across each country, less than 3% stated that they either didn’t see the point in recycling , or they viewed plastic as a less important material type to recycle.



In all three countries, the percentage of households who say they recycle all their plastics increases markedly with age. Consumers aged 65+ in Germany report they are the strongest performers – 68% say they recycle all their plastics. This contrasts with the 18-24 age group where less than one in three say they recycle all their plastics (29% in the UK, 24% in Germany and 18% in Poland). Even though older age groups in Poland claim to perform better than the younger households, over half still cite at least one barrier.

Acceptability of plastic waste management options



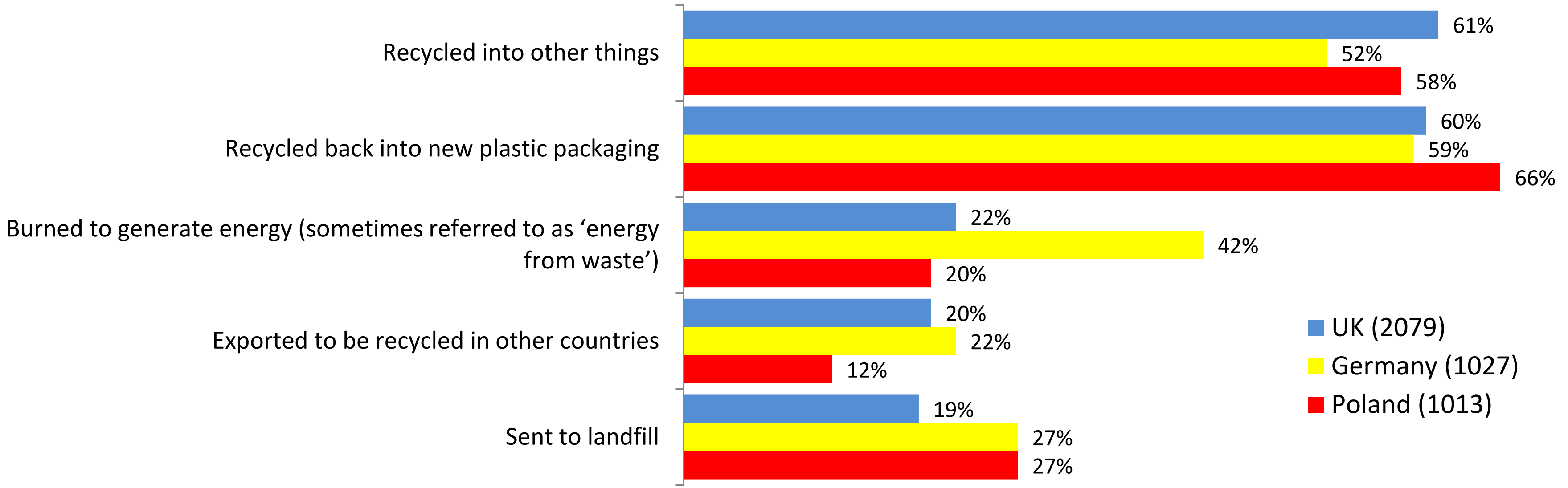
It is important to understand how consumers view the waste management options available for plastics packaging, and there are some interesting comparisons and trends in this study.

Landfill is generally viewed as unacceptable, and there is near universal acceptance of recycling whether back into packaging or into other items

In Germany and the UK, the acceptability of sending plastics to energy recovery is significantly higher than the acceptability of exporting plastics for recycling in other countries. In Poland, this preference is reversed which may be due to less recycling infrastructure leading to a higher acceptance that materials need to be exported.

Both energy recovery and export of plastics packaging for recycling are common practice despite being significantly less acceptable to consumers compared to recycling in the country of consumption.

Where do you think the plastics go once collected for recycling?



Households in Germany are around twice as likely as those in either the UK or Poland to think their plastics will get burned to create energy (42% vs. 22% and 20% respectively). This relates closely to the more developed energy recovery infrastructure in Germany. The UK is the least likely to expect plastics to go to landfill. Less than two thirds of consumers in all three countries believe the plastics collected for recycling will be recycled, irrespective of whether it is kept within the country or exported.

Interest in knowing more about what happens to plastics

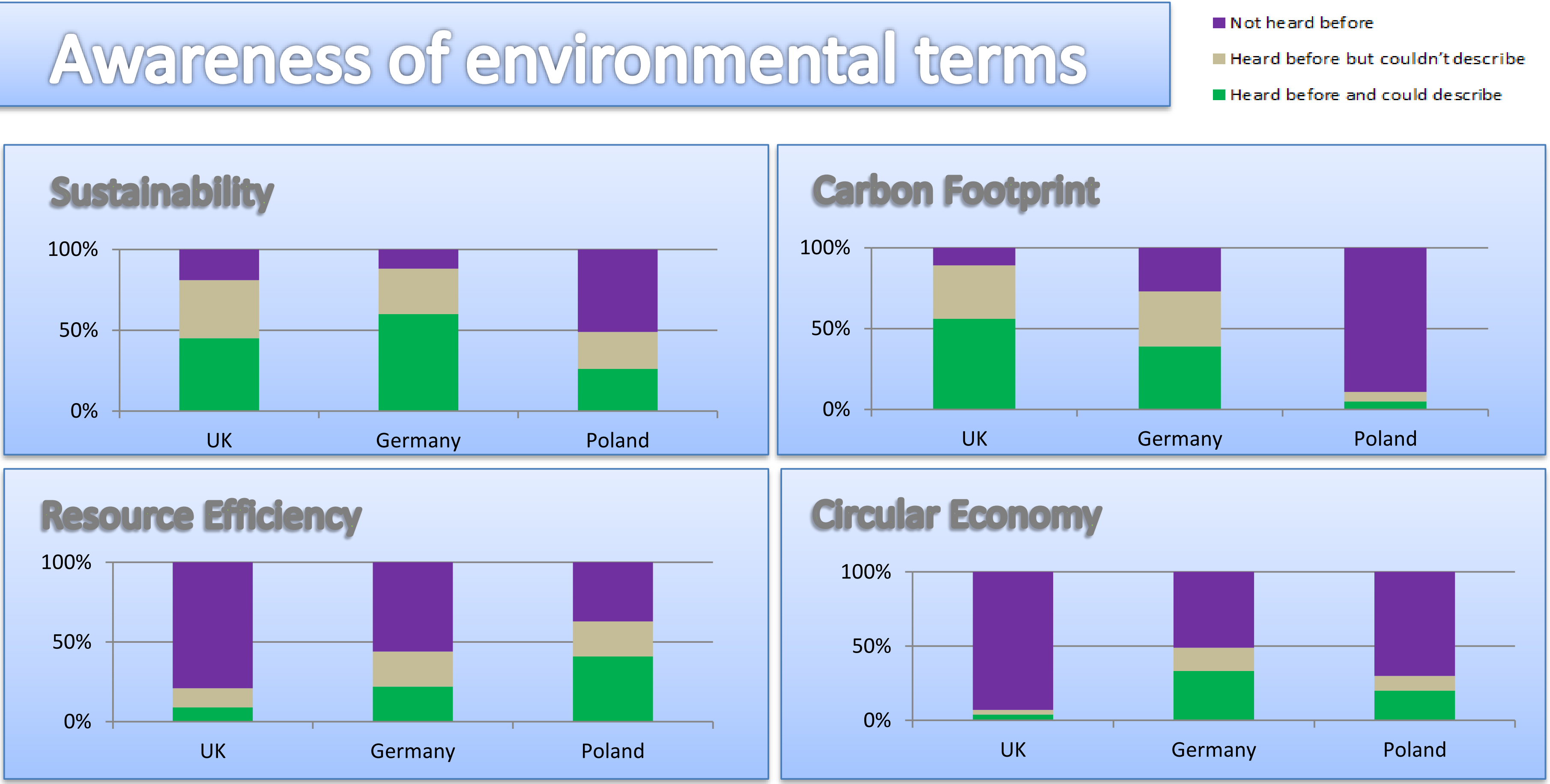
Unsurprisingly, over half of consumers in each country are interested to know more about what happens to plastics once they are collected. This ranges from almost three quarters (74%) in Germany to two in three (67%) in the UK and 54% in Poland.

This study has not incorporated recycling communications and consumer engagement methods, but this will inevitably play a key role in the consumer responses at a national, regional and local level.

Bottle end products

Pot, tub and tray end products

Awareness of environmental terms



Not aware of any of these terms : UK = 3%; Germany = 5%; Poland = 19%

Respondents were asked if they were aware of and could describe terms relating to environmental issues and the use of natural resources. There was some significant differences between the responses from each country.

In the UK, there was a high level of claimed awareness and understanding of sustainability (81%) and carbon footprint (88%). Only a small fraction of respondents had heard of resource efficiency (21%) or circular economy (7%).

Sustainability (88%)and carbon footprint (73%) were also the most commonly heard of terms from German respondents. However, there was also significantly higher recognition of circular economy (50%) and resource efficiency (44%) terms.

The Polish consumers provided very different results with the highest awareness relating to resource efficiency (63%). Sustainability (49%) and circular economy (30%) were the next most heard of, but carbon footprint had a much lower recognition rate (11%).

With the increasing use of new environmental terms, these need to be communicated effectively if used as part of consumer engagement. Again these results may relate to how these terms are used in individual countries and regions which is beyond the scope of this study.

Willingness to pay for sustainability

- Respondents were asked if they were willing to pay 5% more for a product that was manufactured in a resource efficient way (that is, efficient use of energy / water, using recycled material and designed to be recycled at the end of its life). Households in Germany are significantly more likely than those in either Poland or the UK to be 'very willing' to pay extra (23% vs. 15% and 7% respectively).
- The UK is the least likely to be prepared to pay extra – 43% are 'not very' or 'not at all' willing (vs 28% in Germany and 30% in Poland).
- 18-34s in the UK are more likely than older age groups to be willing to pay more (53% vs. 42% and 41%, respectively). This broad trend is repeated in Germany, although the 35-54s are as willing as the 18-34s to pay more. Poland shows no such variation by age.

	Germany	UK	Poland
Very willing	29%	19%	27%
Fairly willing	43%	38%	43%
Not very willing	17%	27%	22%
Not willing at all	11%	16%	8%

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