

RETHINKING RECYCLING IN NELSON AND TASMAN

FINAL REPORT
JUNE 2021



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01



SUMMARY INSIGHTS



1

Nelson / Tasman residents are becoming more sceptical about the regions' recycling systems.

Compared to 2020, fewer residents believe that it is worth taking the time to recycle correctly (79% vs. 87%).

There is evidence that the changes to the recycling systems made as a result of the COVID-19 lockdown have caused this. 40% of Nelson / Tasman residents now believe that all recycling ends up in landfill (vs. 27% in 2020).

This perception needs to be challenged so that residents are encouraged to continue to recycle correctly.

2

Recent changes to the recycling systems appear to be confusing residents.

Following the changes made as a result of COVID-19, Nelson / Tasman residents are becoming more hesitant around recycling.

More residents find knowing what can and can't be recycled confusing (52%, vs. 41% in 2020).

In addition, residents are losing confidence in their ability to recycle correctly. In 2021, just under half (49%) are very / extremely confident in their recycling ability. This compares to 64% in 2020.

3

Recycling knowledge remains consistent with 2020, indicating continued scope for improvement.

In 2021, Nelson / Tasman residents correctly identified 72% of the tested items as being recyclable or not (a mean of 15.1 out of 21 items). This compares to 70% in 2020 (a mean of 21 out of 30 items).

On average residents are still getting one in three items incorrect, resulting a in higher potential for contamination.

The key items that residents get incorrect tend to be ones that are not recyclable (compostables, plastic cutlery etc.), meaning that these items are getting wish-cycled.

4

Knowledge of recycling symbols is largely consistent with 2020.

A lack of knowledge of recycling symbols can result in items being incorrectly sorted.

Most Nelson / Tasman residents continue to be aware that Number 1 (75%) and Number 5 (73%) plastics are recyclable.

There is evidence that residents are paying more attention to recycling symbols. 61% correctly identified Number 8 plastic as being fake (up from 44% in 2020). In addition, only 38% said that the international recycling symbol means an item can be recycled. While this is generally true, it suggests that recycling symbols aren't being used as a heuristic to the extent that they once were.

5

Residents largely put the onus for waste reduction on the councils – but are unaware as to what the plan is.

Three-quarters (75%) of Tasman residents feel that Tasman District Council is highly responsible for reducing waste, and 68% of Nelson residents feel the same for Nelson City Council. This compares to 71% who feel that they personally have a high level of responsibility.

However, despite the responsibility they place on their councils, residents are largely unaware of what the waste minimisation plan is. When asked, 50% of residents said 'don't know.'

To get buy-in, efforts should be made to increase awareness of these plans.

6

There is evidence the circular economy is building. Residents are performing more waste reduction and recycling behaviours than in 2020.

The average Nelson / Tasman resident claims to have performed 9.6 out of 15 of the waste reduction and recycling behaviours over the past 12 months. This compares to a mean of 7.3 for Nelson residents in 2019.

Significantly more residents in 2021 are opting to repair items, rather than buy new ones (77% vs. 67%), or hire items (31% vs. 21%).

Residents perceive a lack of alternatives to plastic as the biggest barrier to them further reducing waste.

02



BACKGROUND & METHODOLOGY





150
online interviews

*Respondents were sourced from Colmar
Brunton's online panel*



Nelson and Tasman residents
18+, weighted by age within
gender, and region

*Data has been post weighted to align it with
Stats NZ population counts from the 2018
census*



Fieldwork
12 April– 23 April



Maximum margin of error
+/-7.9%
(at the 95% confidence interval)

This study comes off the back of two previous pieces of work – the Environmental Attitudes study, conducted for Nelson City Council in 2019, and the Rethinking Rubbish & Recycling study, conducted for WasteMINZ in 2020 (fieldwork was conducted prior to Lockdown). Nelson City Council and Tasman District Council commissioned a regional report for this study.

This report provides updated figures on some of the questions asked in these previous bodies of work. It explores Nelson and Tasman residents' awareness and understanding of the recycling system and how to recycle correctly, as well as their attitudes towards waste reduction, and waste reduction behaviours.

The information will be used to help inform the Councils' performance indicator, relating to waste minimisation attitudes, and participation in waste minimisation activities by constituents.

Comparisons to previous work

Where possible, comparisons are made to both of the previous bodies of work. Please note that whenever the report refers to 'the average', this is the average figure from the current wave (2021). All differences are statistically significant at the 90% confidence level, unless otherwise stated.

It should be noted that although comparisons are made to both the previous Nelson study and the Nelson / Tasman WasteMINZ study, these should be treated with some caution. The previous Nelson study did not include Tasman residents, and the Nelson / Tasman sample from the WasteMINZ study had a lower sample size and quotas were not set to control for balance of residents between Nelson and Tasman.

03

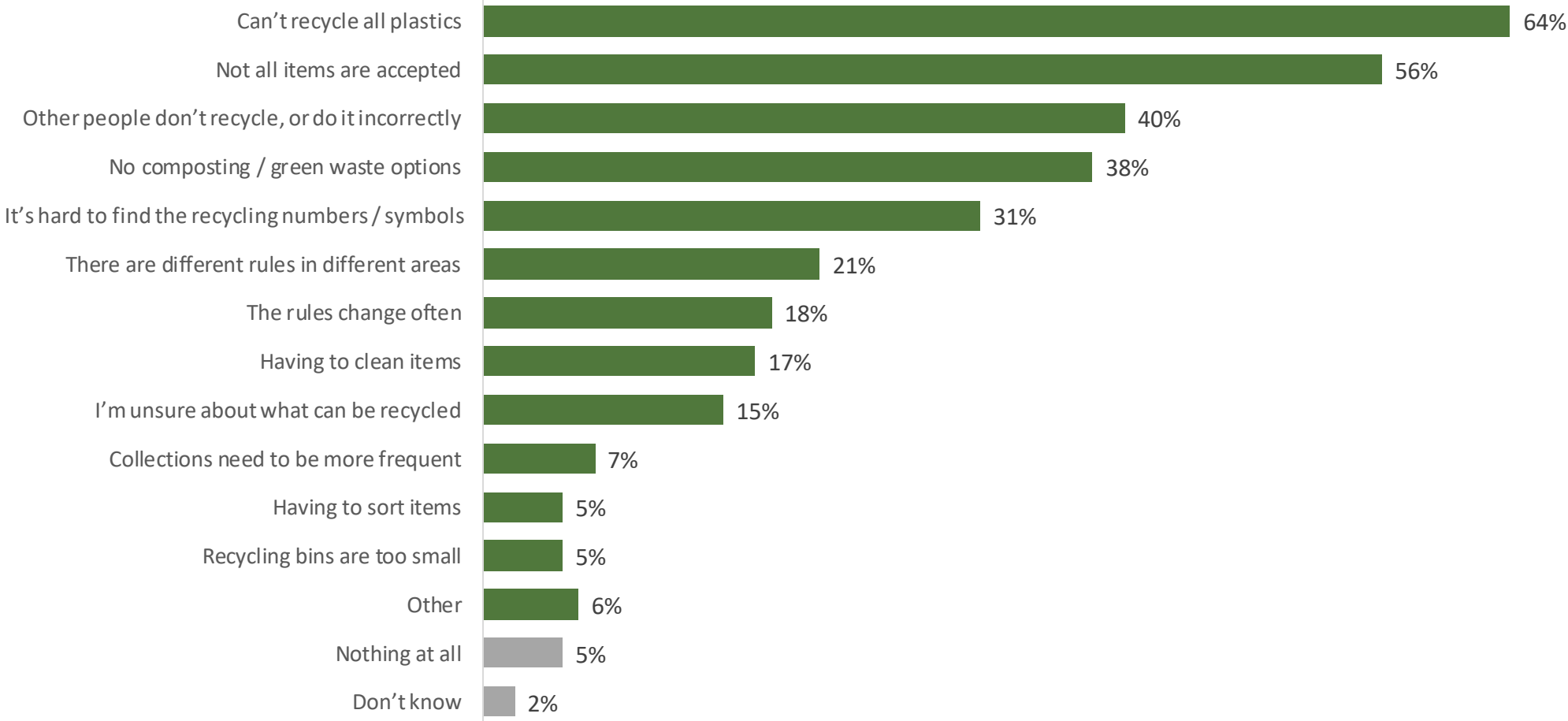


RECYCLING ATTITUDES



RECYCLING PAIN POINTS: Nelson / Tasman residents are more annoyed by not being able to recycle certain items, rather than the effort they have to put in to recycle correctly. Over half of Nelson / Tasman residents are annoyed that they are unable to recycle all plastics (64%), and that not all items are accepted for recycling (56%), while only 17% mention having to clean items, and 5% mention sorting, as pain points.

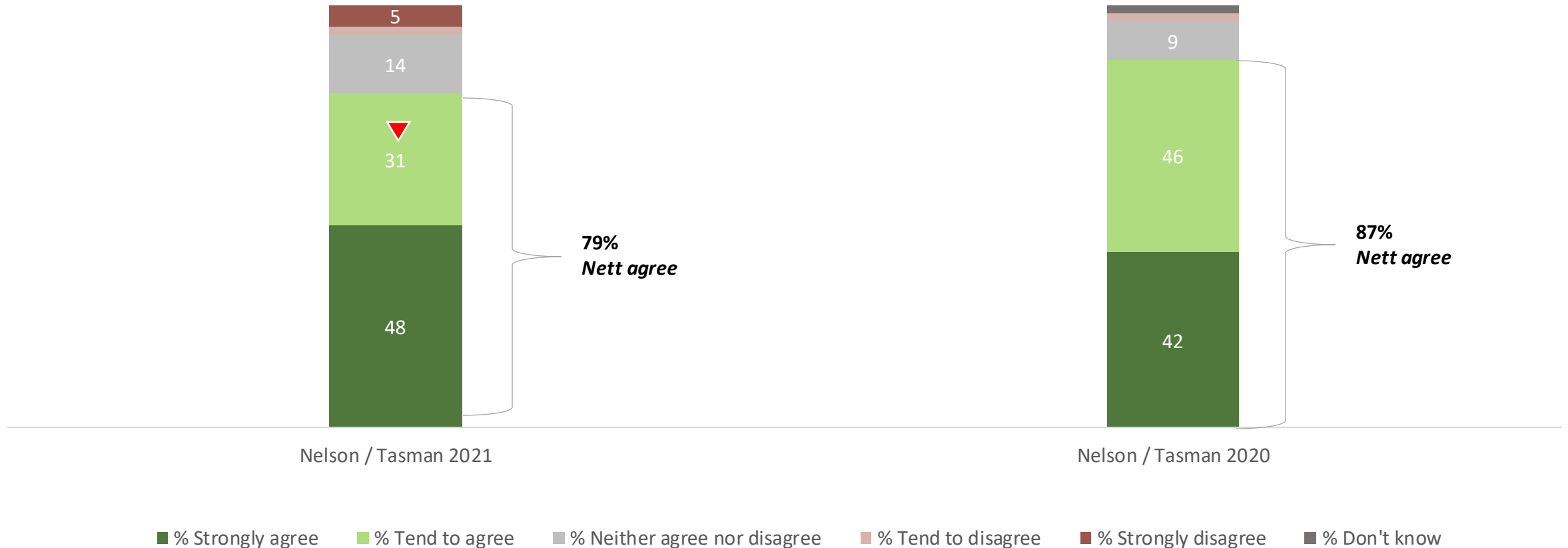
What, if anything, annoys you the most about recycling?¹



Source: C4 – What, if anything, annoys you about recycling?
 Base: Total (n=150)
 1 | Respondents had the option to select multiple responses from the list charted.

BELIEF THAT RECYCLING IS WORTH THE TIME: Eight in ten residents (79%) believe that it is worth taking the time to recycle correctly, down from 87% in 2020. That being said, there has been a slight lift in the proportion who strongly agree with the statement. 7% also now actively disagree with this statement, compared to 2% in 2020. One explanation is that the changes in what the Councils accept since lockdown have made residents feel more sceptical about the recycling system.

“I believe it’s worth taking the time to recycle right”



EASE AND CONFIDENCE IN RECYCLING: Nelson / Tasman residents' confidence in their ability to recycle correctly has declined since 2020. There is also evidence that residents are encountering increased friction in the recycling system, with an increase in the proportion who disagree that recycling is easy (16% compared to 10%, albeit this is not statistically significant).

Confidence in recycling ability

"I find recycling easy"

% Very / extremely Confident

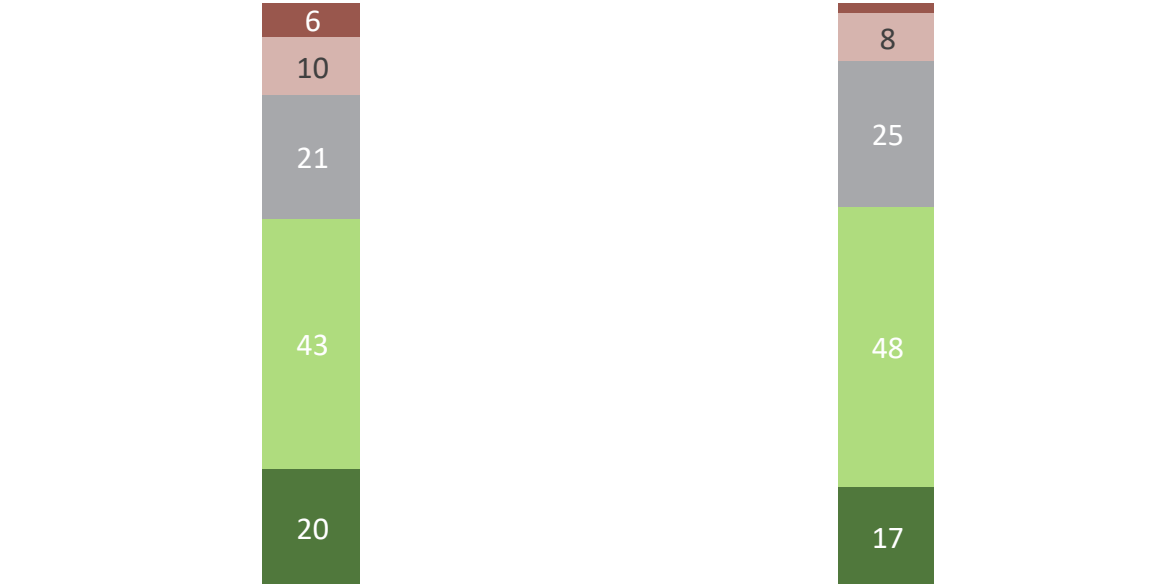
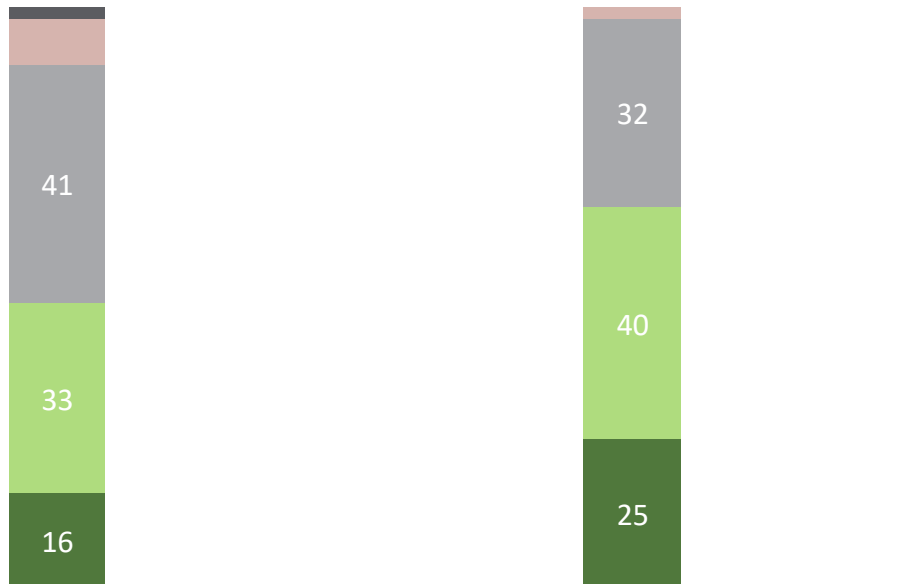
49 ▼

64

% Nett Agree

63

65



Nelson / Tasman 2021

Nelson / Tasman (n=100)

Nelson / Tasman 2021

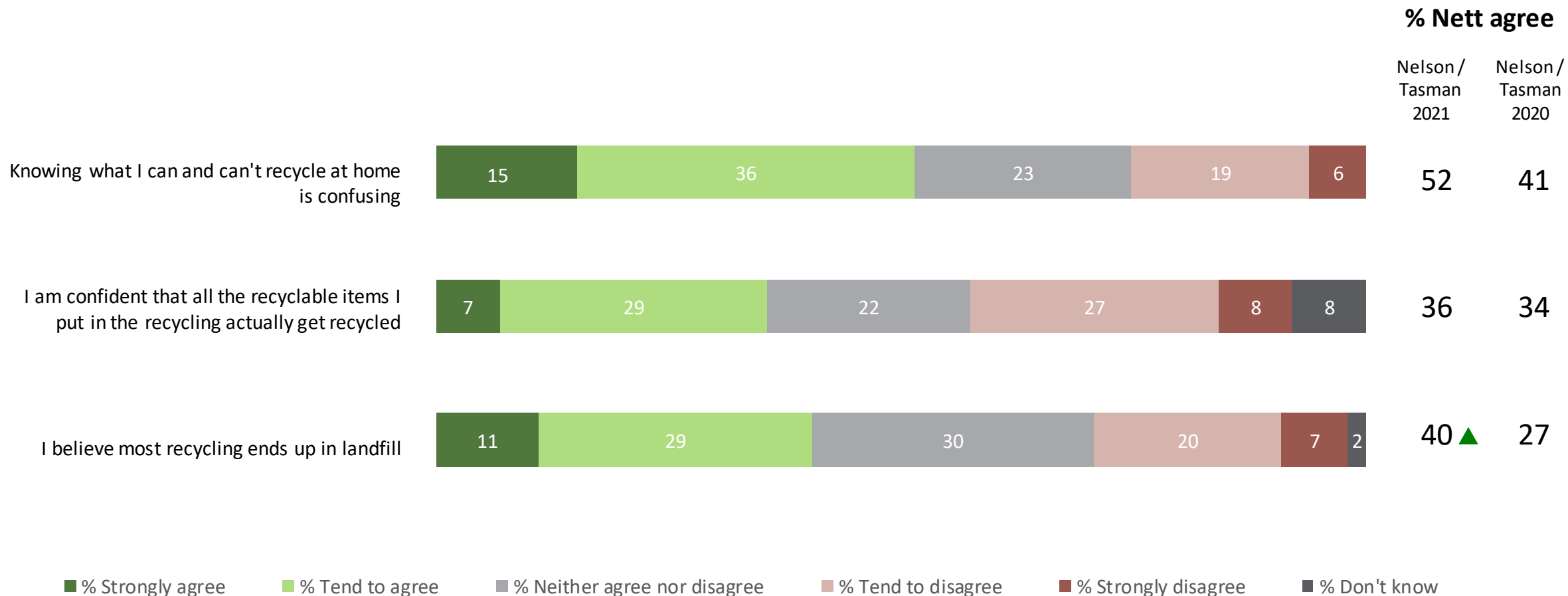
Nelson / Tasman (n=100)

- % Extremely confident
- % Very confident
- % Fairly confident
- % Not very confident
- % Not at all confident
- % Don't know

- % Strongly agree
- % Tend to agree
- % Neither agree nor disagree
- % Tend to disagree
- % Strongly disagree
- % Don't know

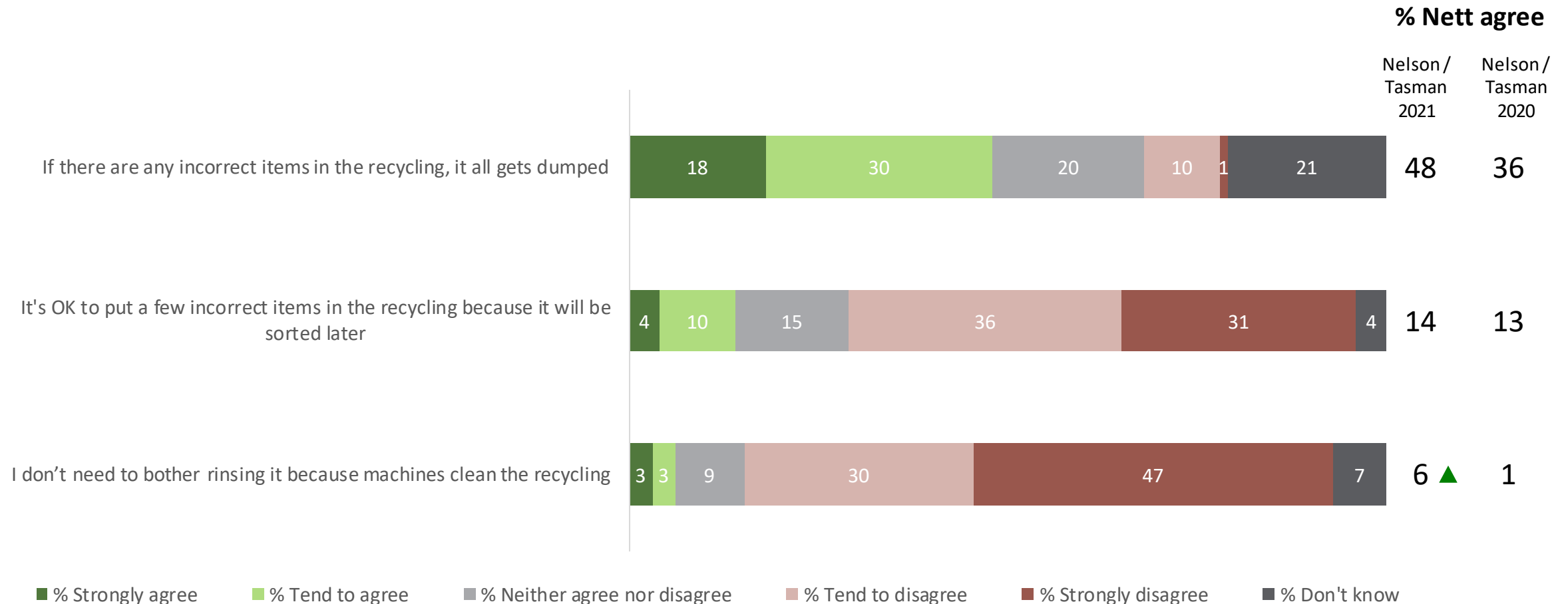
BARRIERS TO RECYCLING: As found in the previous research, confusion in the recycling system and a lack of confidence in it can deter commitment to recycling correctly. 52% of Nelson / Tasman residents now say that knowing what they can and cannot recycle at home is confusing – up from 41% in 2020. Additionally, 40% now believe that most recycling ends up in landfill – likely as a result of the changes introduced over Lockdown.

Barriers to recycling – How much do you agree or disagree with the following statements?



MISPERCEPTIONS AROUND THE RECYCLING SYSTEM: The proportion of residents that believe that recycling gets dumped if there are any incorrect items in it has increased notably since 2020. Almost half of residents now believe this. An increasing proportion of residents are also pushing responsibility onto the recycling system, with 6% thinking that they don't need to rinse items, and 14% thinking that they don't need to sort items.

*Misperceptions around contamination and automation in the recycling system:
How much do you agree or disagree with the following statements?*



04



RECYCLING KNOWLEDGE



INTUITIVE ASSOCIATION: The next few slides break down the results of the intuitive association exercise. Respondents were provided with a series of items and asked to select if they would typically recycle them. Their response was timed so we could measure the strength of their response. In other words, is this something they intuitively believed (i.e. it's hard-wired in their brain), or did they take more time to deliberate over their answer? Below is a breakdown of each category.

FAST CORRECT

The proportion of respondents who provided a fast correct response. 'Fast' means that the response was quicker than their average response time across all of the items. The average was calculated at a respondent-level.

SLOW CORRECT

The proportion of respondents who provided a slow correct response. 'Slow' means that the response was slower than their average response time across all of the items.

NETT CORRECT

All who gave a correct response. Trends are shown with the 2020 research.



SLOW INCORRECT

As with slow correct, but when an incorrect response was provided

FAST INCORRECT

As with fast correct, but when an incorrect response was provided

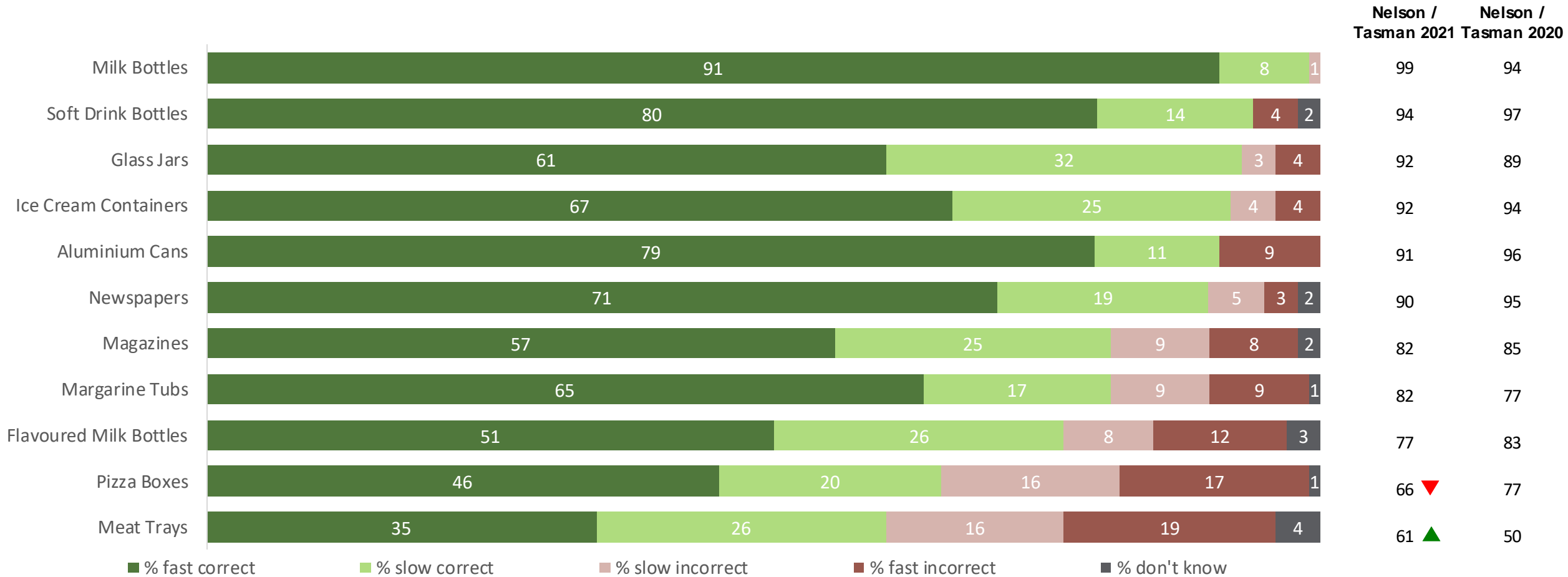
DON'T KNOW

Respondents were coded to a 'don't know' when no response was provided for an item in the allotted time

■ % fast correct
 ■ % slow correct
 ■ % slow incorrect
 ■ % fast incorrect
 ■ % don't know

RECYCLABLE ITEMS: This slide shows the results for those items accepted for recycling by both councils. The following slide shows responses to items that are not accepted by the councils. As in 2020, most residents say they would correctly sort items that are recyclable. The key items to focus on are pizza boxes (which has seen a decline in the proportion of residents correctly identifying them as recyclable), and meat trays (however the proportion correctly identifying these as recyclable has increased from 2020.).

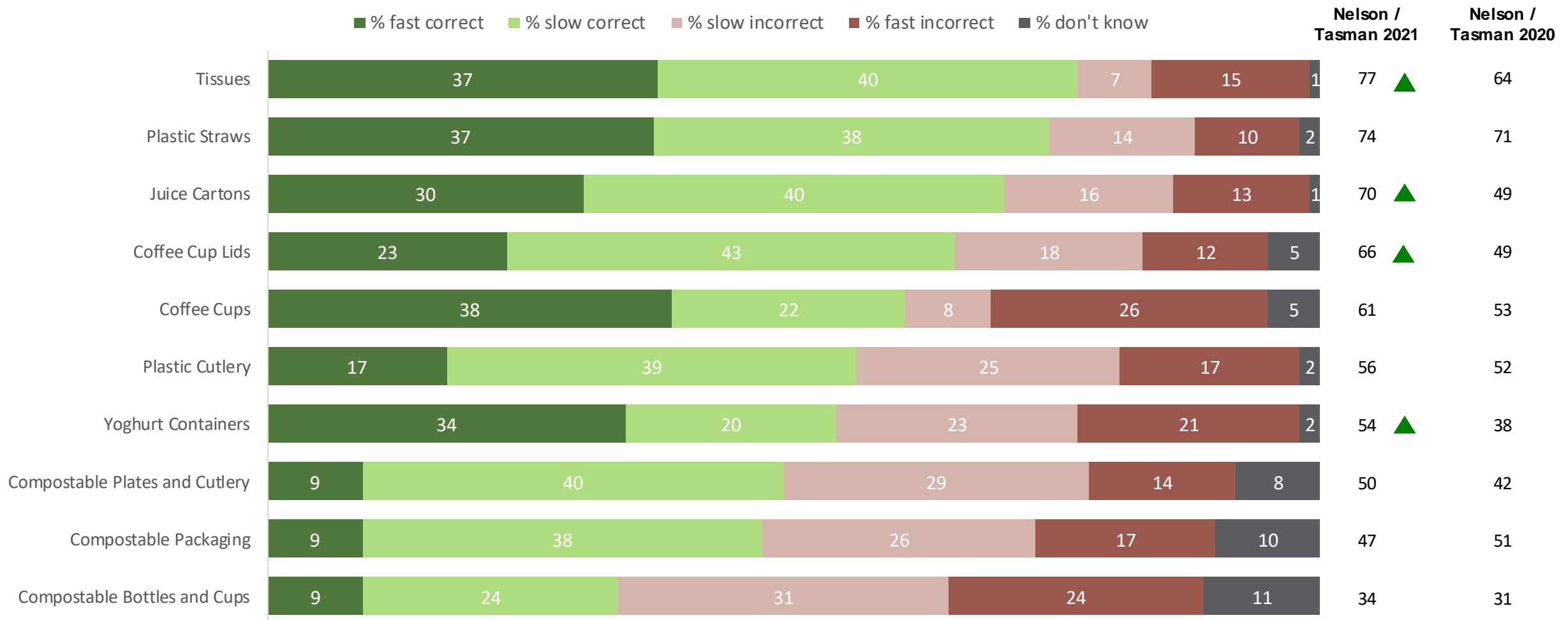
*Would you typically put these items in your recycling?
(Accepted by both Nelson and Tasman Council)*



NON-RECYCLABLE ITEMS: For the most part, residents sort non-recyclable items correctly, and there have been notable improvements since 2020. A greater proportion of residents are correctly not recycling tissues, tetrapaks, coffee cup lids, and yoghurt containers in 2021. The increase in people getting yoghurt containers correct can likely be attributed to them no longer being recyclable by Tasman District Council (last year residents said they could not recycle them, when they could). Compostable materials remain the key items of concern, with the highest levels of wish-cycling.



*Would you typically put these items in your recycling?
(Not accepted by Nelson and Tasman Council)*

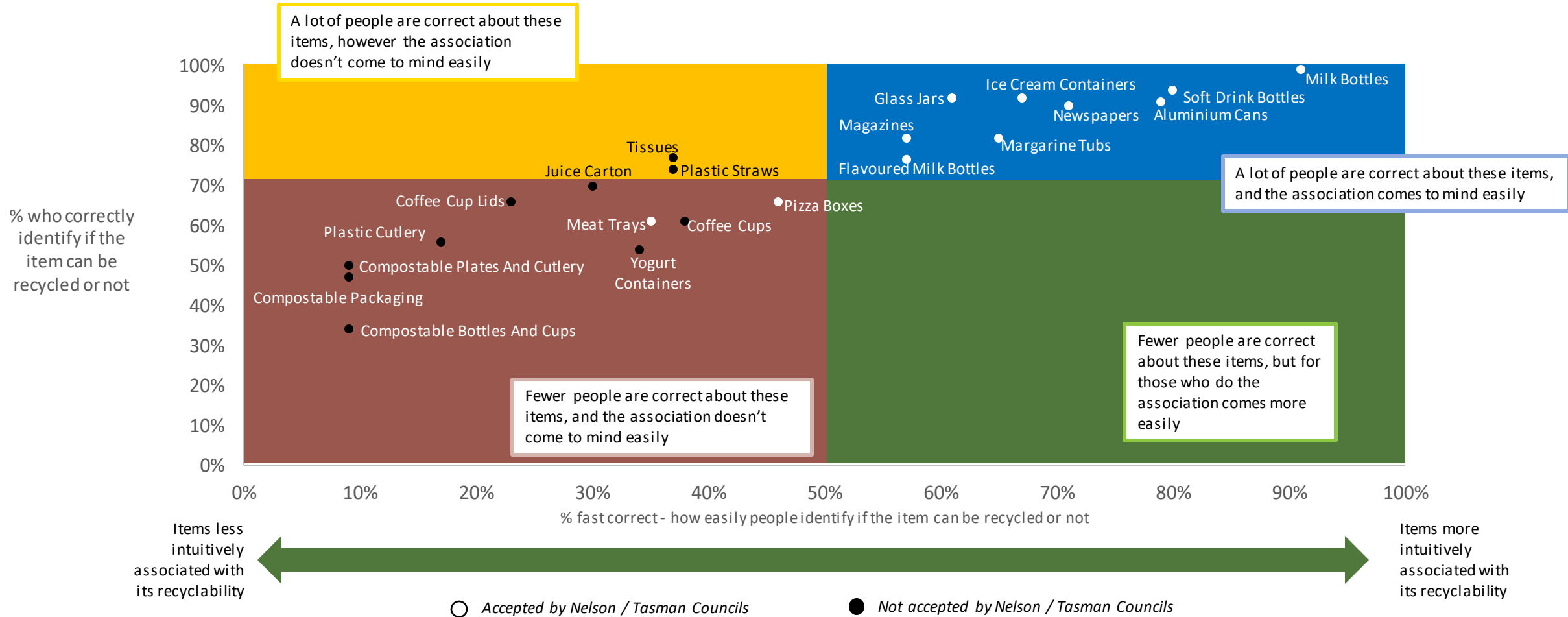


Source: C3
Base: All respondents with a kerbside collection [Nelson / Tasman (2021 n=150, 2020 n=94), New Zealand (n=1,628)]

▲ ▼ Significantly higher / lower than 2020

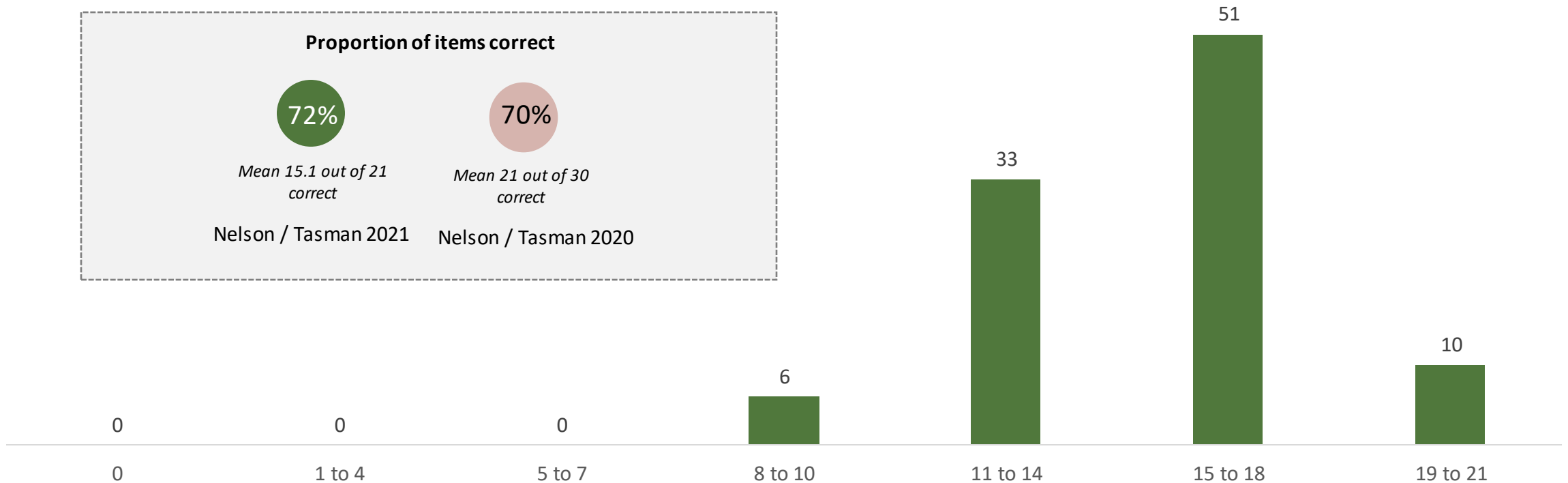
NELSON / TASMAN INTUITIVE ASSOCIATION: This slide provides another way to map the data from the sorting exercise. The yellow quadrant represents items which respondents are more likely to sort correctly but the association could be much stronger. The red quadrant represents items that are more likely to be sorted incorrectly and where residents need support. Overall, residents intuitively know those items they can recycle, with the exception of meat trays. It is the items they can't recycle which tend to trip them up, with clear evidence of wish-cycling.

Nelson / Tasman - Intuitive association with recyclability



NUMBER OF ITEMS CORRECT: A count of correct responses was generated for each respondent. In 2021, Nelson / Tasman residents got an average of 15.1 items correct (out of the 21 items tested). This equates to a score of 72%, which is in line with the 70% seen in 2020.

Number of items correctly identified as being recyclable or not



PERCEPTIONS OF COMPOSTABLE PACKAGING: Compostable packaging appears to have lost some of its shine amongst Nelson / Tasman residents. Fewer now agree that it is better for the environment than plastic packaging (65% vs. 82% in 2020). Additionally, slightly fewer agree that compostable packaging will compost in a landfill with no negative impacts than did in 2020 (albeit this is not statistically significant).

Perceptions of compostable packaging

% Nett Agree

65 ▼

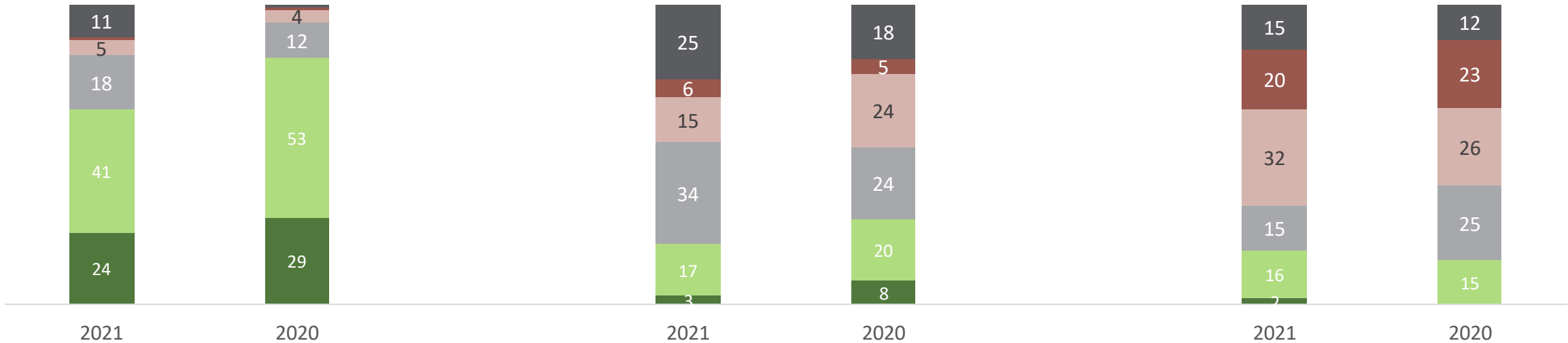
82

20

29

19

15



Compostable packaging is better for the environment than plastic packaging

Compostable packaging will compost in a landfill with no negative impacts

Compostable packaging will break down quickly if littered

■ % Strongly agree ■ % Tend to agree ■ % Neither agree nor disagree ■ % Tend to disagree ■ % Strongly disagree ■ % Don't know

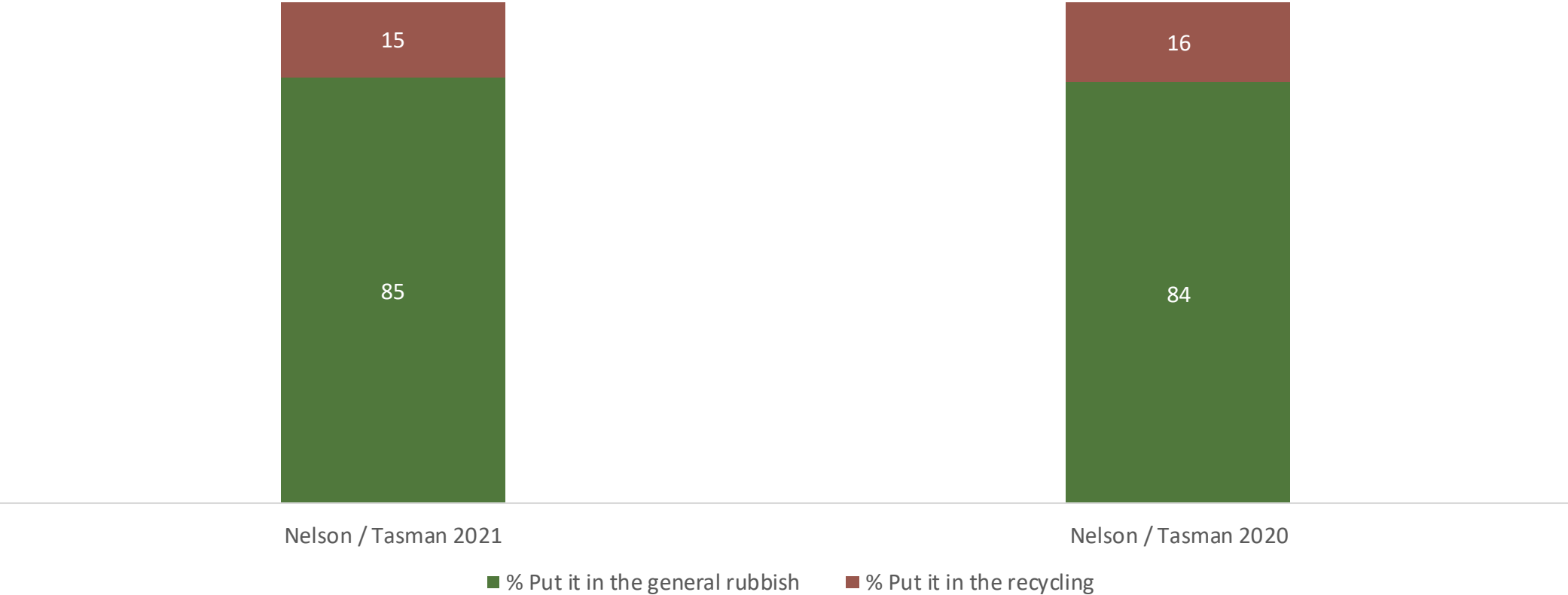
05



SELF-REPORTED RECYCLING BEHAVIOURS

BEHAVIOUR IF UNSURE: Residents continue to err on the side of caution when they are unsure of an item’s recyclability. 85% say they would typically put such an item in the general rubbish, rather than take a chance and put it in the recycling. This is in line with the Nelson / Tasman scores in 2020.

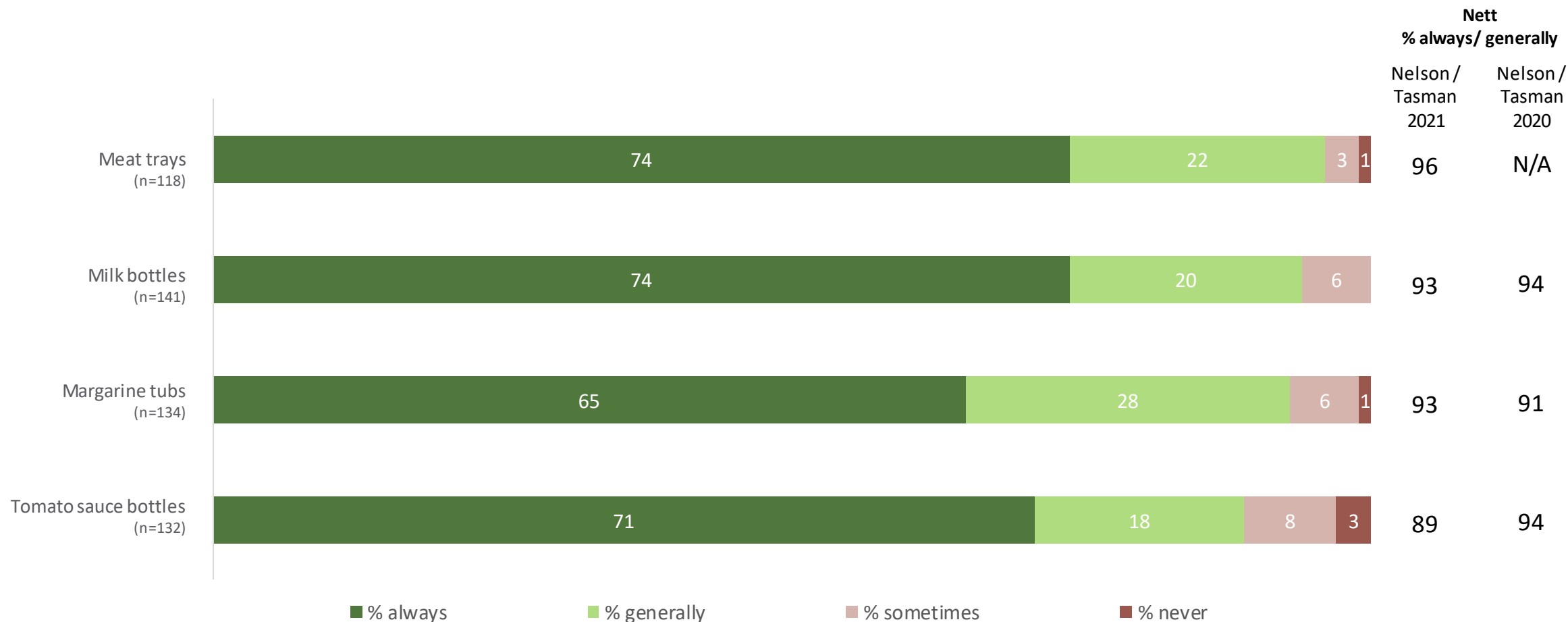
If you are unsure whether an item can be recycled or not, what do you typically do?



Source: D2
Base: All respondents [Nelson / Tasman residents (2021 n=150, 2020 n=100)]

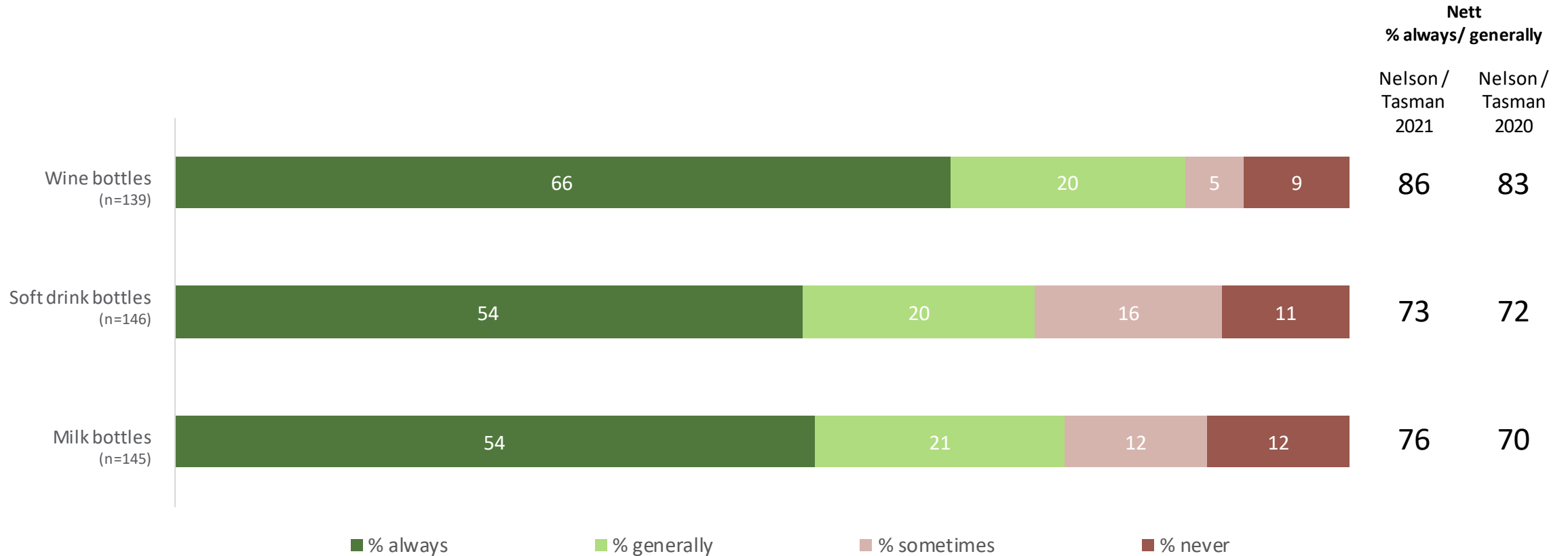
RINSING OF RECYCLABLES: We asked residents how often they perform various recycling behaviours. At least nine in ten Nelson / Tasman residents say that they generally / always rinse the items listed. This is largely in line with 2020.

Do you wash or rinse the following items before you recycle them?



REMOVING LIDS FROM RECYCLABLES: Removing lids continues to be a less common behaviour than rinsing amongst Nelson / Tasman residents, however there are indicative signs of improvement.

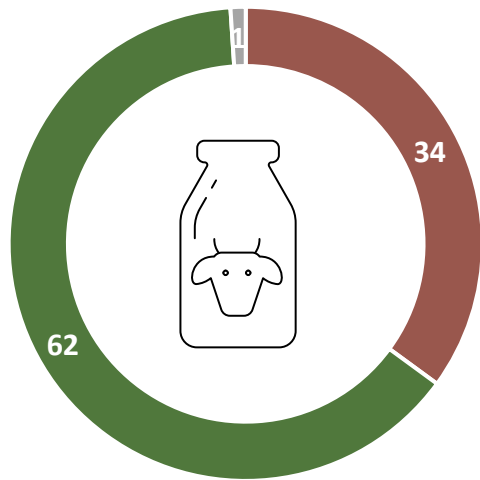
Do you remove the lid from the following items before putting them in your recycling?



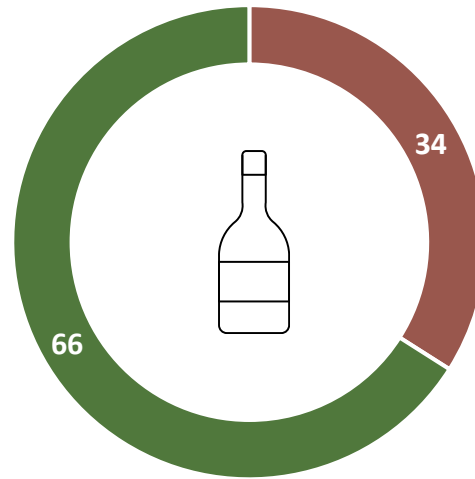
WHERE LIDS ARE PUT ONCE REMOVED: Residents who claimed to remove lids before recycling were asked what they did with the lids. The majority of residents put these lids in the general rubbish, while around one-third put them in the recycling. A small minority (who said 'other') collect the lids for various purposes (e.g. for school projects).

And where do you put the lids of each of these items once you remove them?

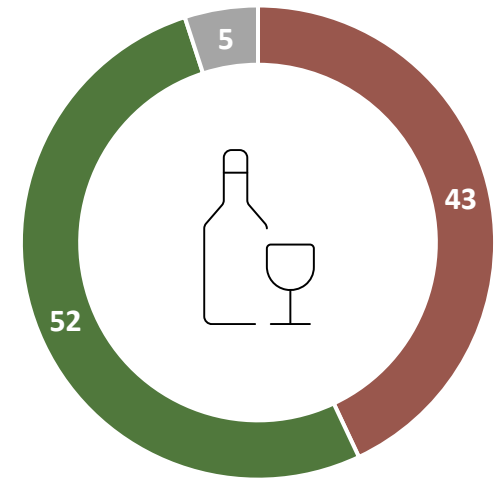
Milk bottles
(n=128)



Soft drink bottles
(n=130)



Wine bottles
(n=129)



■ Recycling Bin ■ General Rubbish ■ Other

06



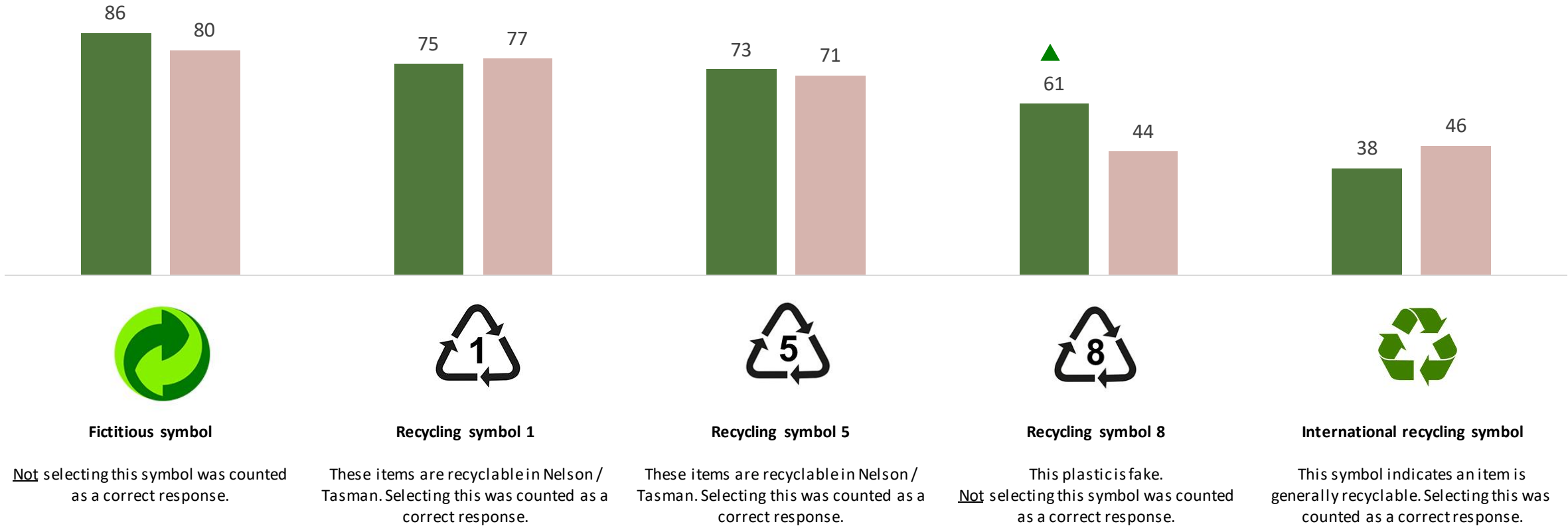
RECYCLING SYMBOLS



RECYCLING SYMBOLS KNOWLEDGE: We asked residents to identify which symbols indicated that an item could be recycled. Most residents correctly identify that the fictitious symbol is fake, or that Number 1 or Number 5 plastics can be recycled. Residents are less likely to get Number 8 correct (which was a ‘red herring’) than either Number 1 or 5, but the proportion has increased since 2020. Only 38% of residents get the international recycling symbol ‘correct’. This is even lower than 2020, albeit the difference is not statistically significant. Of course, this symbol is largely indicative, and does not always mean the item can be recycled in every jurisdiction. Therefore, the slight decline is not necessarily a ‘bad’ result, but perhaps indicates that residents are paying more attention.

Which of these symbols or numbers tell you that a plastic container is recyclable?

■ % correct Nelson / Tasman 2021 ■ % correct Nelson / Tasman 2020



Not selecting this symbol was counted as a correct response.

These items are recyclable in Nelson / Tasman. Selecting this was counted as a correct response.

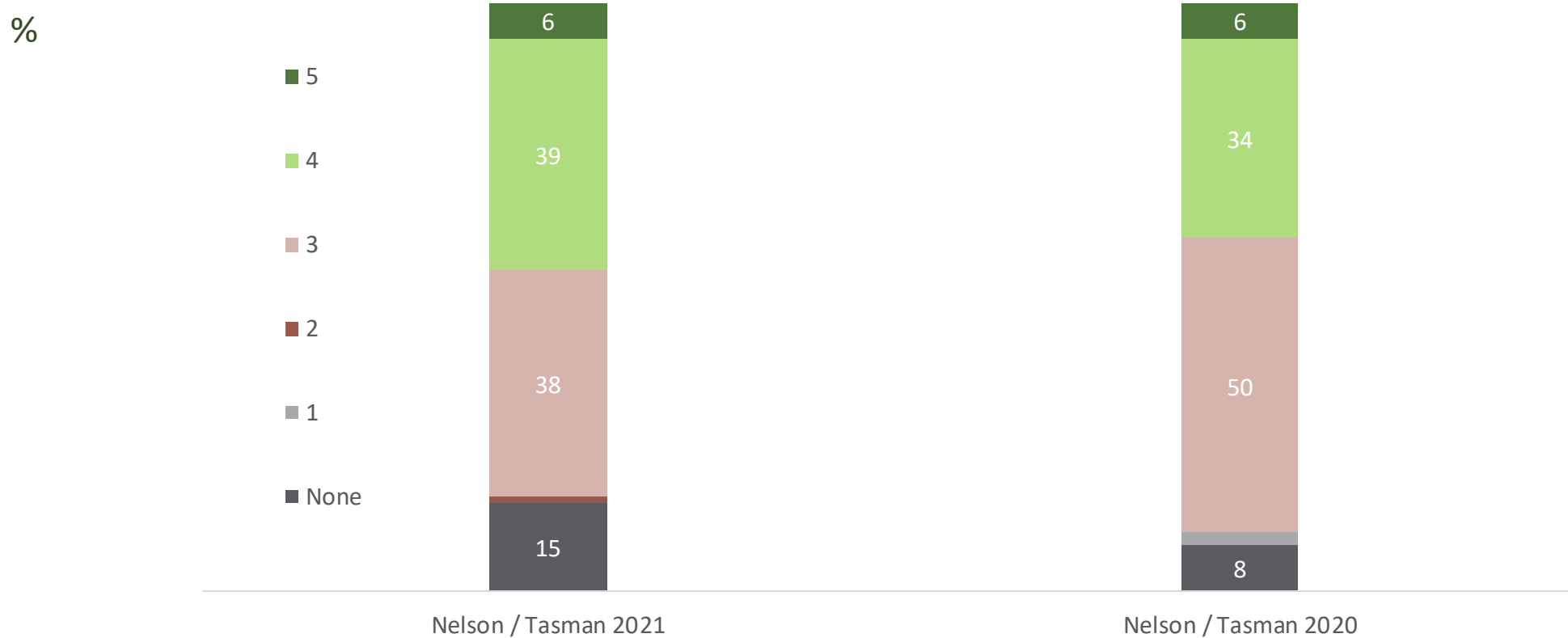
These items are recyclable in Nelson / Tasman. Selecting this was counted as a correct response.

This plastic is fake. Not selecting this symbol was counted as a correct response.

This symbol indicates an item is generally recyclable. Selecting this was counted as a correct response.

NUMBER OF RECYCLING SYMBOLS CORRECT: The mean number of symbols that residents got correct in 2021 is 3.02. This is in line with the 2020 findings. There is, however, a greater spread of the results – while more residents got four of the five symbols correct, the proportion who got none correct has almost doubled. Residents with greater confidence in their recycling ability got more symbols correct (3.39) than average.

Number of recycling symbols correct (out of five)



Mean number of correct responses

3.02
2021
VS.

3.18
Nelson / Tasman
2020

07

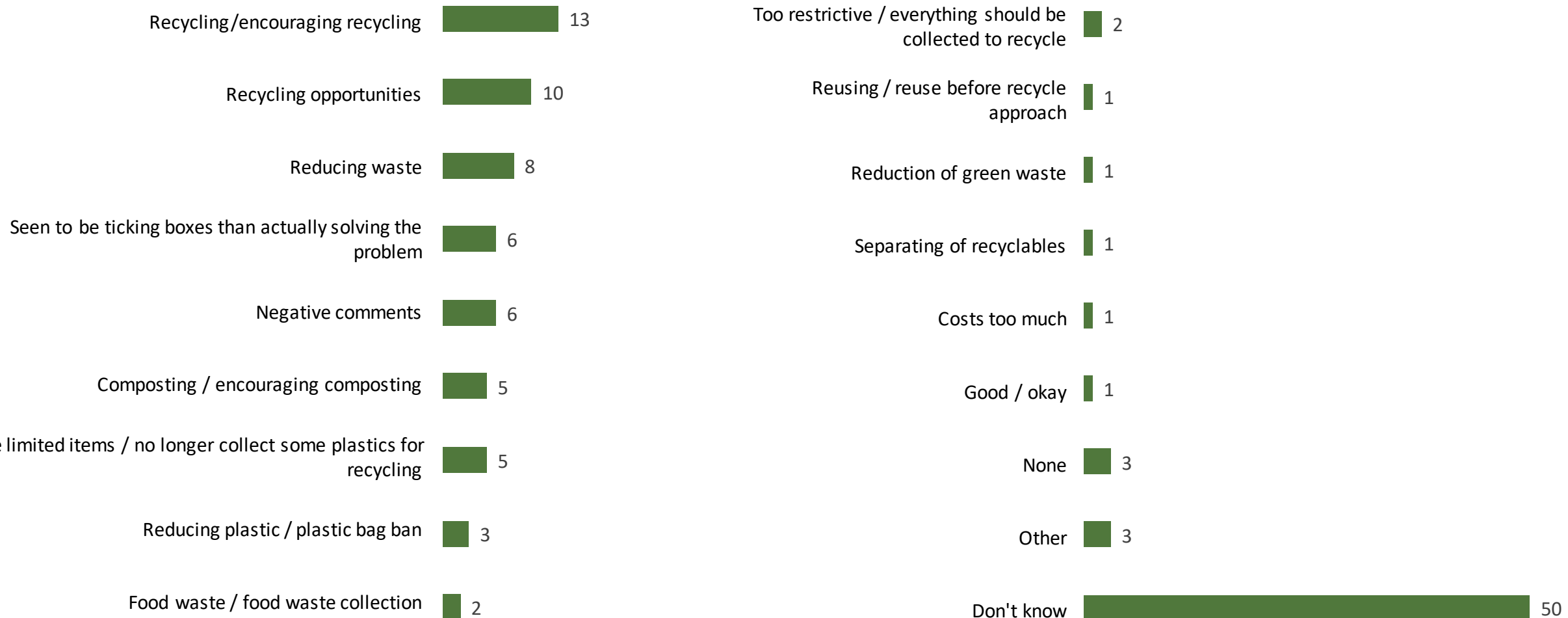


THE PATH TO REDUCING WASTE



UNDERSTANDING OF COUNCIL PLANS: There appears to be limited awareness and understanding of the councils' plans for reducing waste in the Nelson and Tasman regions, with half of respondents saying 'don't know.' Of those that were able to provide a response, the main responses referenced recycling – either encouraging residents to do so, or providing opportunities for further recycling. 8% of residents also mention 'reducing waste' – including minimising what goes to landfill, as well as reducing the amount of waste produced by businesses and at things like public events.

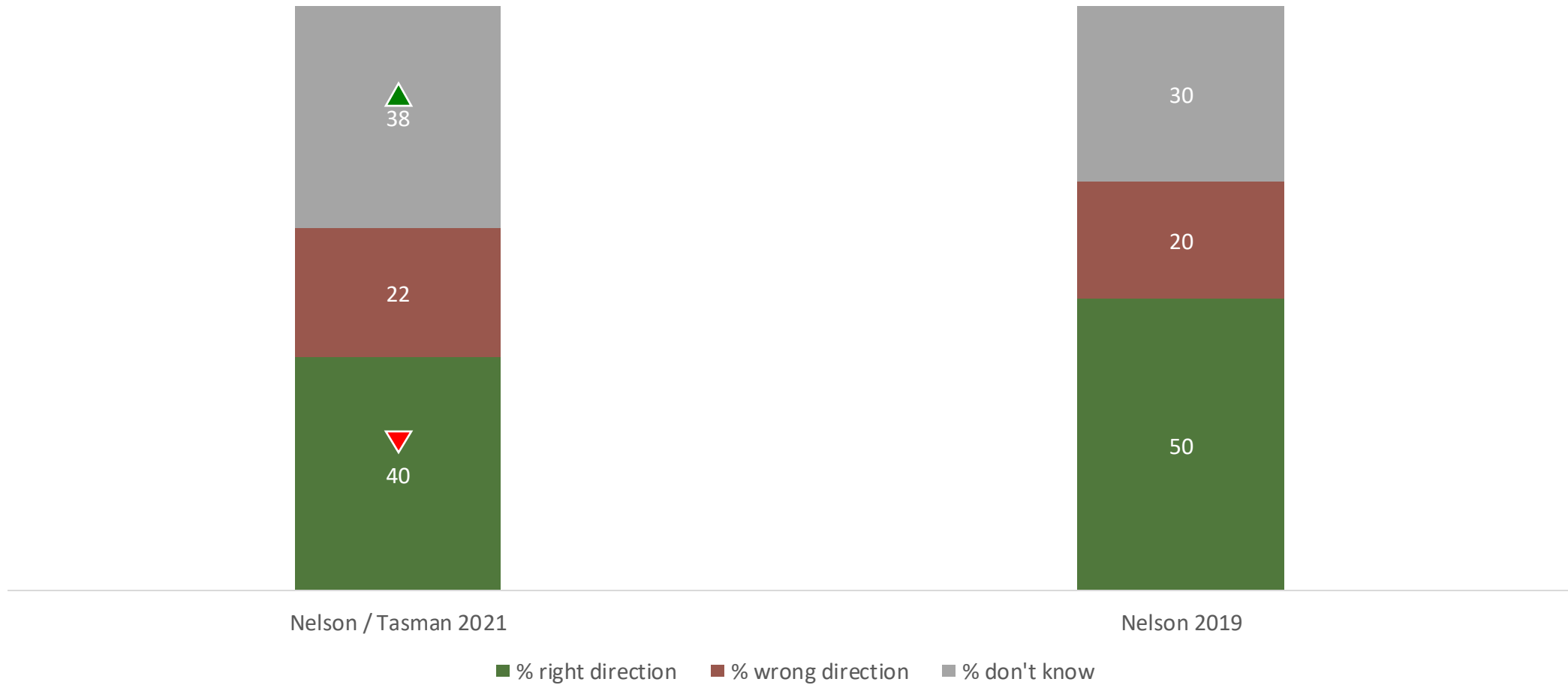
What residents think their local council's plan for reducing waste in their region is¹



Source: B3
 Base: All residents [Nelson / Tasman 2021 n=150]
 1 | Question was asked open-ended

REGIONAL DIRECTION: Residents are less likely to feel that the respective regions are moving in the right direction on waste reduction when compared to Nelson residents views in 2019. They are more likely to take a neutral position as opposed to feel the regions are heading in the wrong direction.

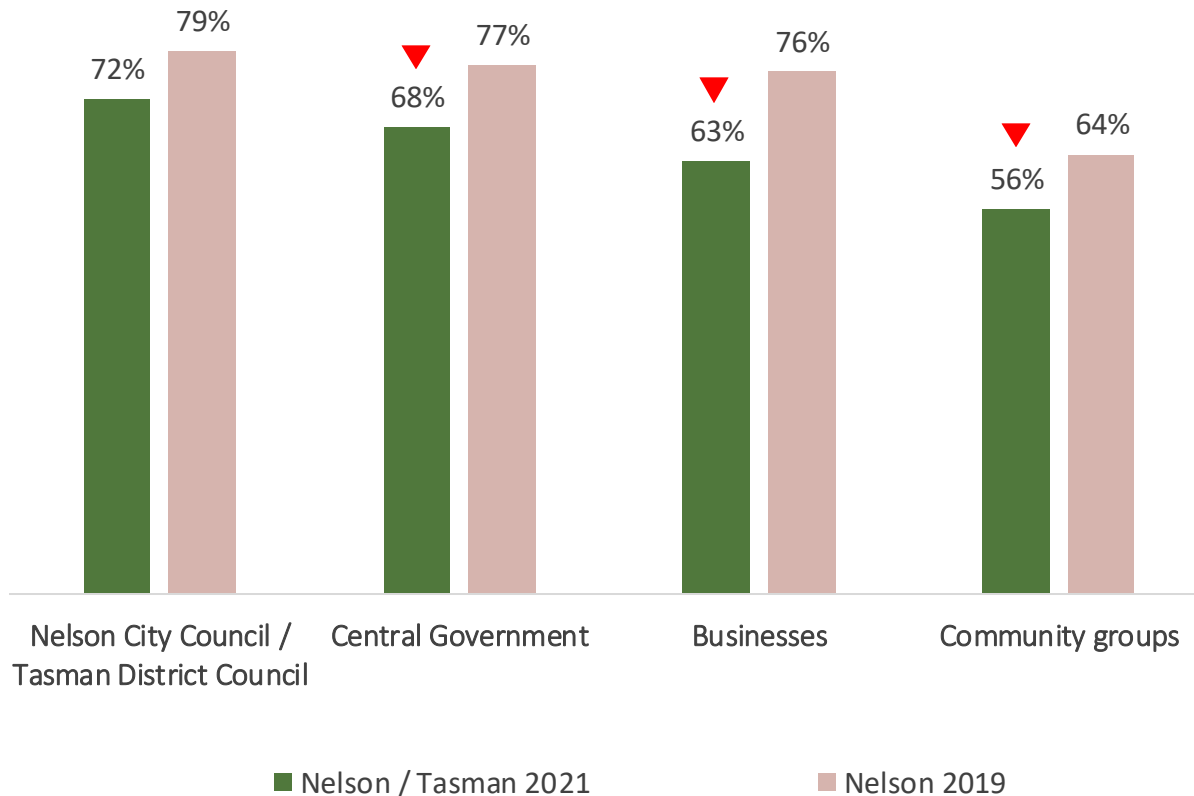
Is the [Nelson / Tasman] region heading in the right or wrong direction in how it approaches reducing the amount of waste we produce?



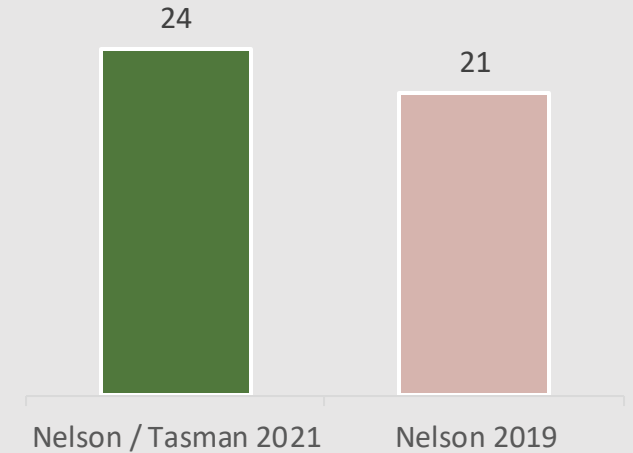
▲ ▼ Significantly higher / lower than Nelson 2019
Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

RESPONSIBILITY FOR REDUCING WASTE: Residents place less responsibility for reducing waste on central government, businesses, and community groups than they did in 2019, while still placing the onus on the councils. However, only a minority of residents feel that the councils are actually doing enough to reduce waste. The same is true for central government.

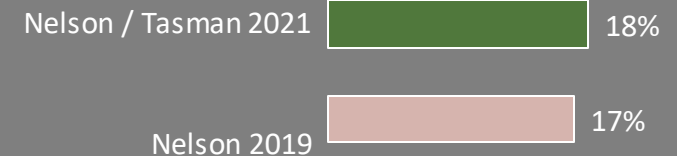
Proportion of people surveyed who agree that these groups have a high responsibility for reducing waste:



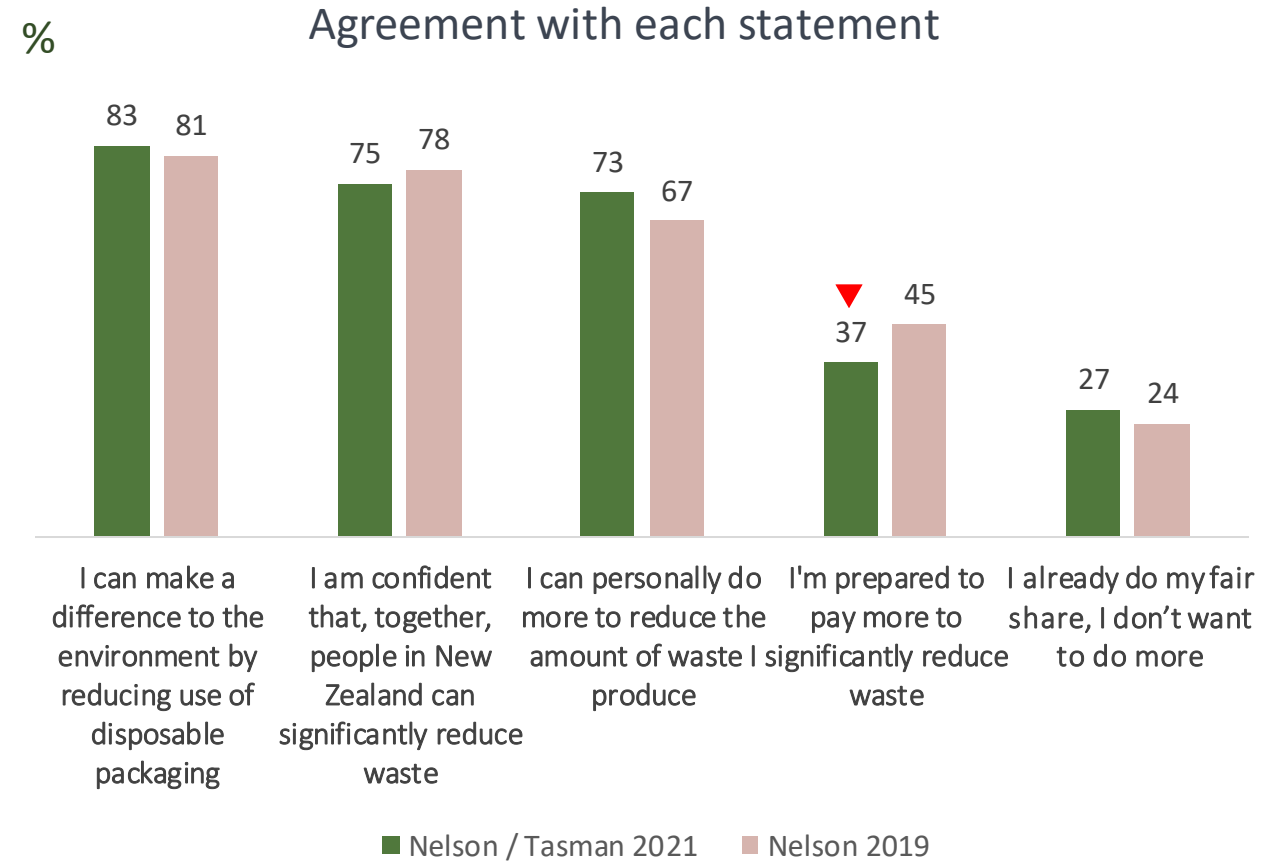
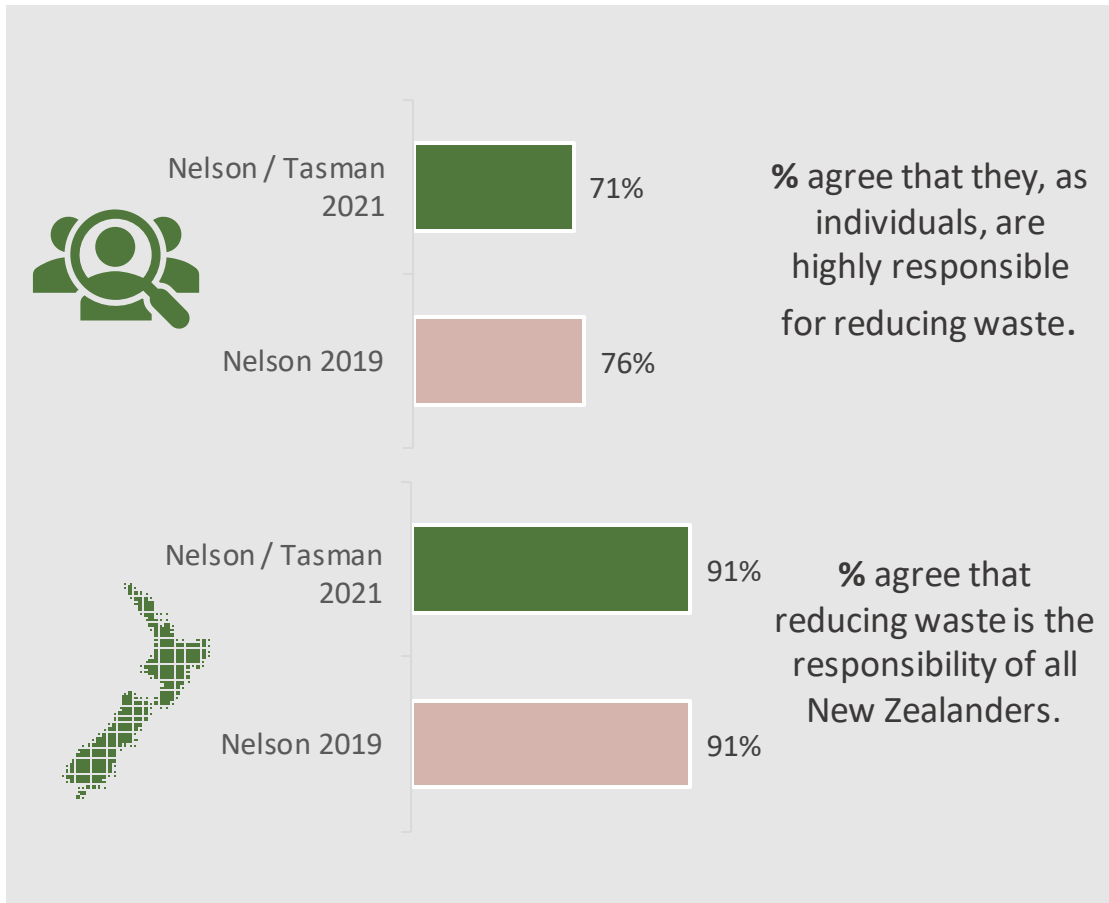
% agree that their council is doing enough to reduce waste



% agree that **Central Government** is doing enough to reduce waste



PERSONAL RESPONSIBILITY: There is a strong sense of personal responsibility for reducing waste, and this is in line with the 2019 Nelson research. That said, most residents continue to feel that reducing waste is everyone's responsibility. There is acknowledgement amongst residents that there is more than they personally can do, and that they can actually make a difference. However, there is less appetite for paying more to reduce waste than in 2019.



08



WASTE REDUCTION IN PRACTICE

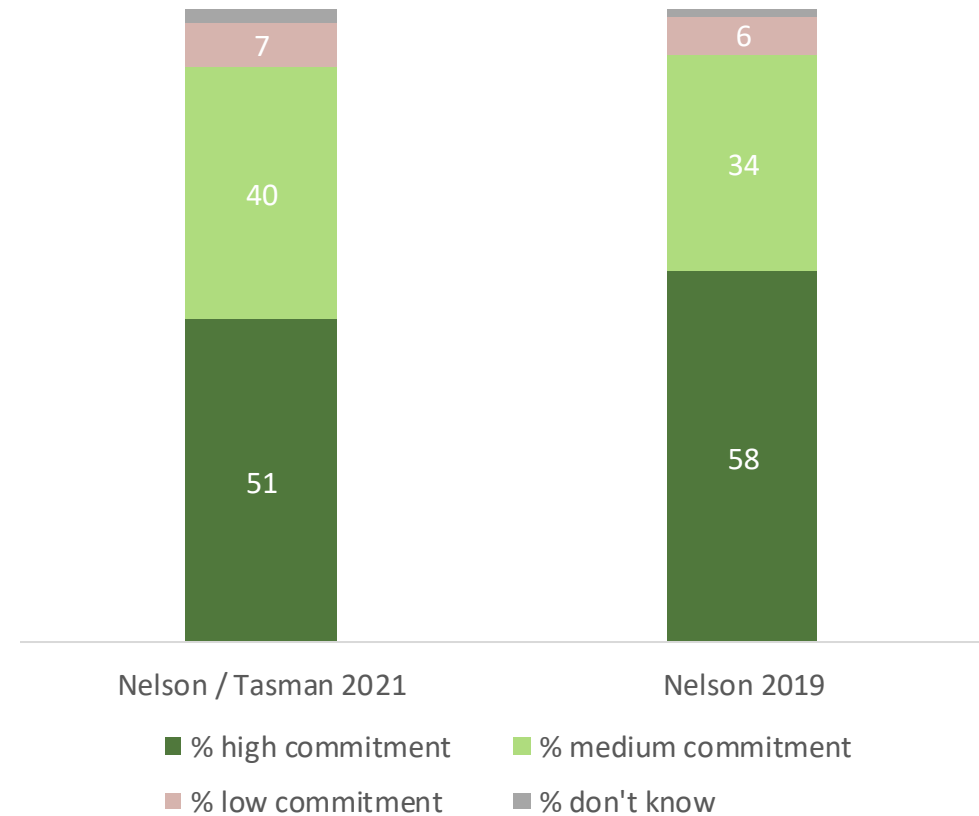
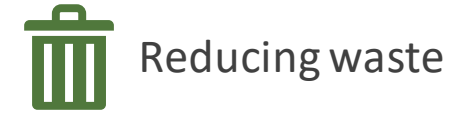
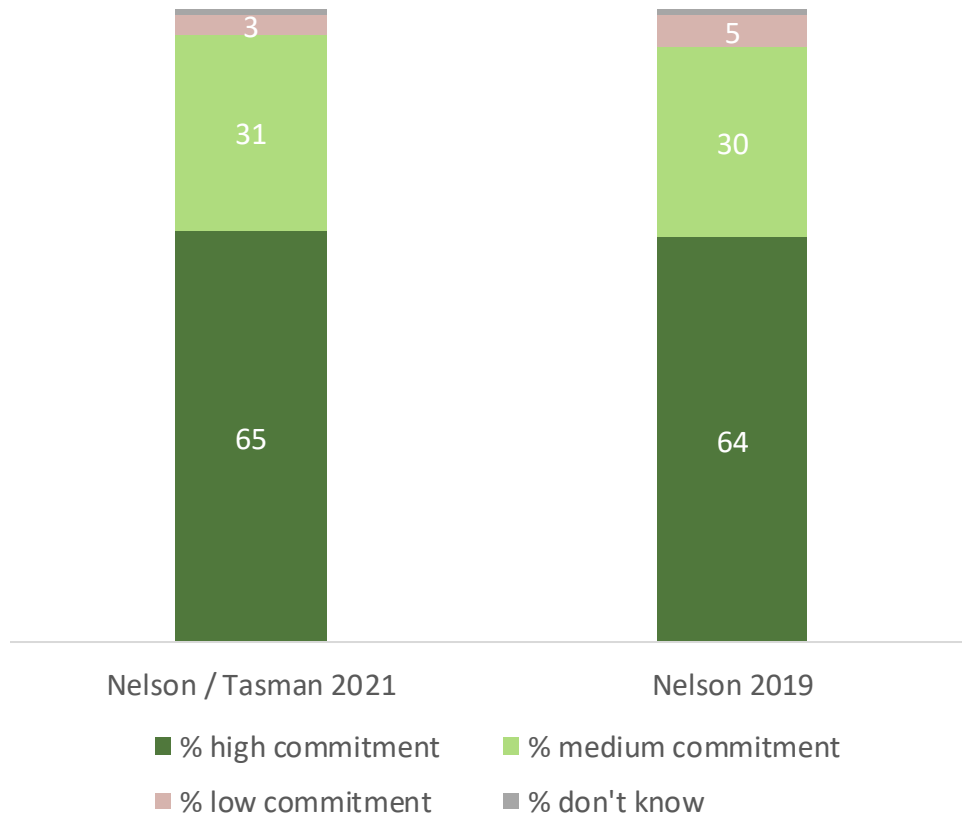


COMMITMENT TO RECYCLING AND REDUCING WASTE: Nelson and Tasman residents are broadly committed to both recycling and reducing waste. 65% say they are highly committed to recycling which is in line with 2019. In addition, 51% say they are highly committed to reducing waste. This compares to 58% in 2019, albeit the difference is not statistically significant.

How would you rate your personal commitment to the following?



%

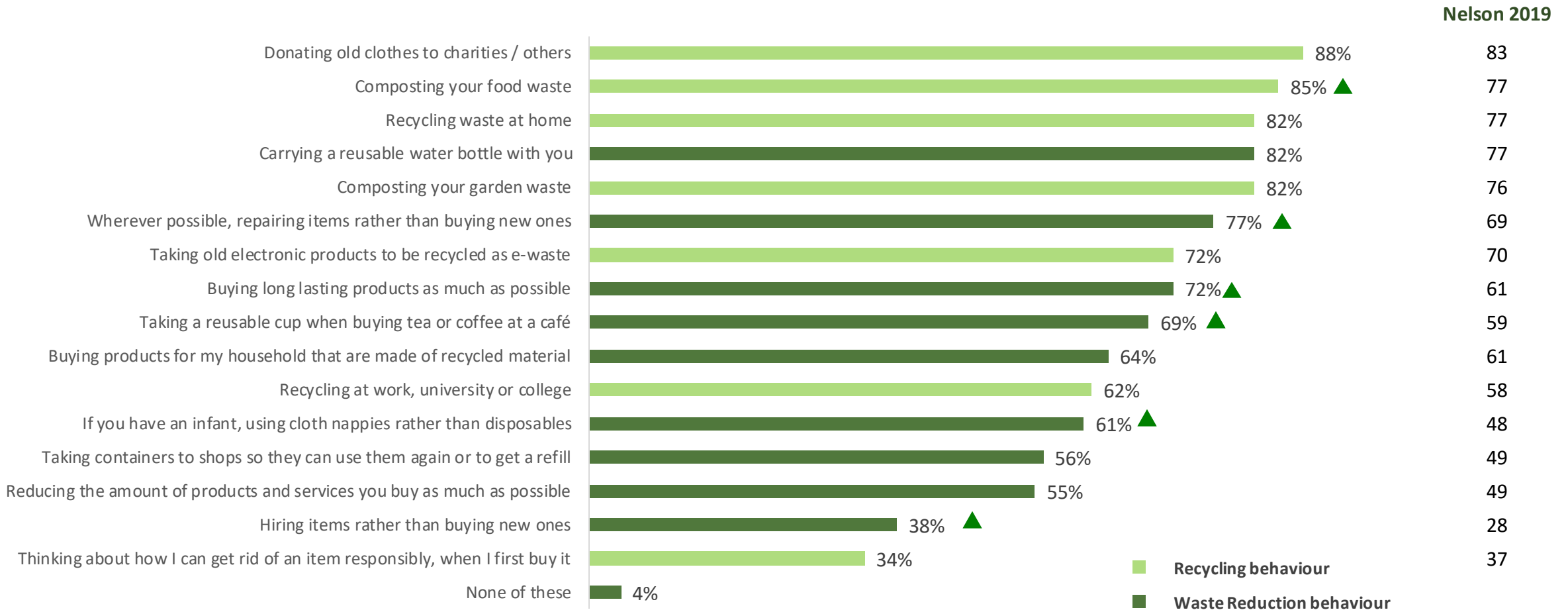


Source: F2
 Base: All residents [Nelson / Tasman 2021 n=150
 Nelson 2019 n=325]

▲ ▼ Significantly higher / lower than Nelson 2019
 Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

AWARENESS OF BEHAVIOURS: There is strong awareness of most of the waste reduction and recycling behaviours, with over half of Nelson / Tasman residents being aware of almost all behaviours. In addition, there have been small increases in awareness for most behaviours since the 2019 Nelson research. The key behaviours to raise awareness of are hiring, rather than buying items, and encouraging residents to think about how they will responsibly dispose of an item when they first purchase it. That said, there has been an increase in awareness of the idea of hiring items since 2019.

Which of the following did you realise was a way of reducing waste?

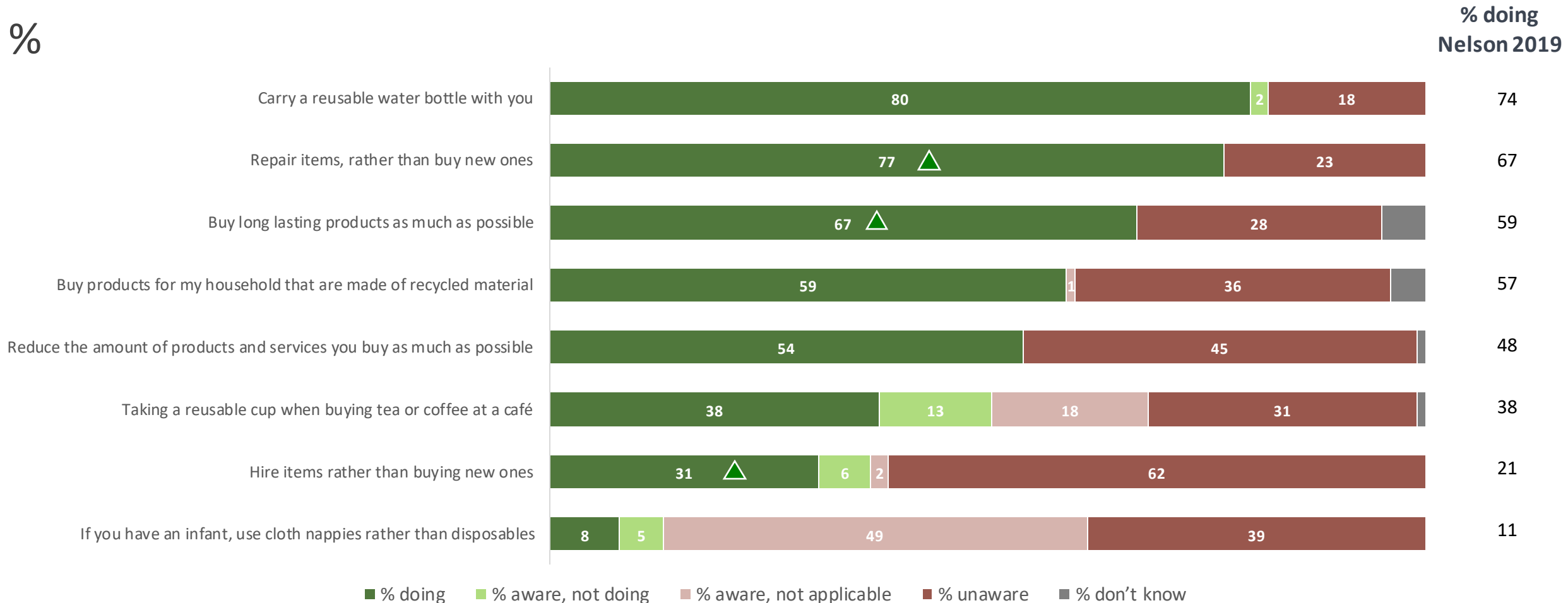


Source: F2
 Base: All residents [Nelson / Tasman 2021 n=150
 Nelson 2019 n=325]

▲ ▼ Significantly higher / lower than Nelson 2019
 Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

PERFORMANCE OF WASTE REDUCTION BEHAVIOURS: There is greater evidence of the circular economy in play in 2021. More residents are repairing or hiring items in 2021, compared to the 2019 Nelson research. There has been small increases in performance of all other behaviours, except for caregivers of infants using cloth nappies.

Performance of waste reduction behaviours



▲ ▼ Significantly higher / lower than Nelson 2019

Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

PERFORMANCE OF RECYCLING BEHAVIOURS: Over half of Nelson / Tasman residents are performing many of the recycling behaviours. There have been increases in the proportion donating old clothes, and composting food waste, compared to the 2019 Nelson research. Additionally, the mean number of waste reduction and recycling behaviours which residents perform has increased from 7.3 to 9.6 in 2021 (out of a possible 15).

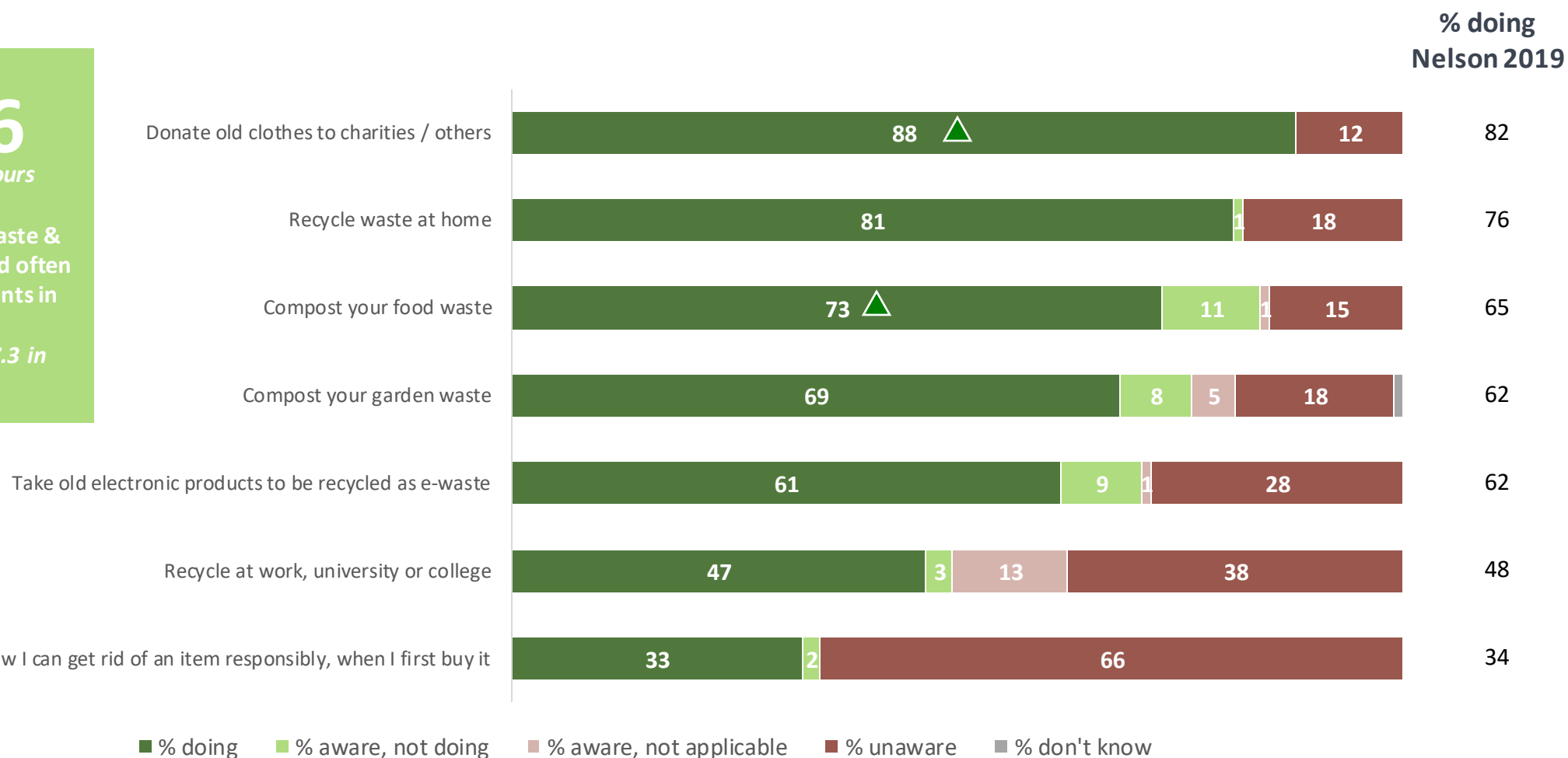
Performance of recycling behaviours

%



9.6
behaviours

The average number of waste & recycling actions performed often by Nelson / Tasman residents in the last 12 months*
Compares to a mean of 7.3 in 2019



Significantly higher / lower than Nelson 2019

Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

SUB-GROUP DIFFERENCES: There are a number of groups that are performing fewer waste reduction and recycling behaviours than the average Nelson / Tasman resident. These groups include men, Nelson residents, urban dwellers, and school leavers. Efforts should be made to increase engagement with these groups, in order to increase performance moving forwards.

Sub-group differences



GROUPS PERFORMING FEWER BEHAVIOURS THAN AVERAGE (9.6)



Men
(8.9)



Nelson residents
(8.9)



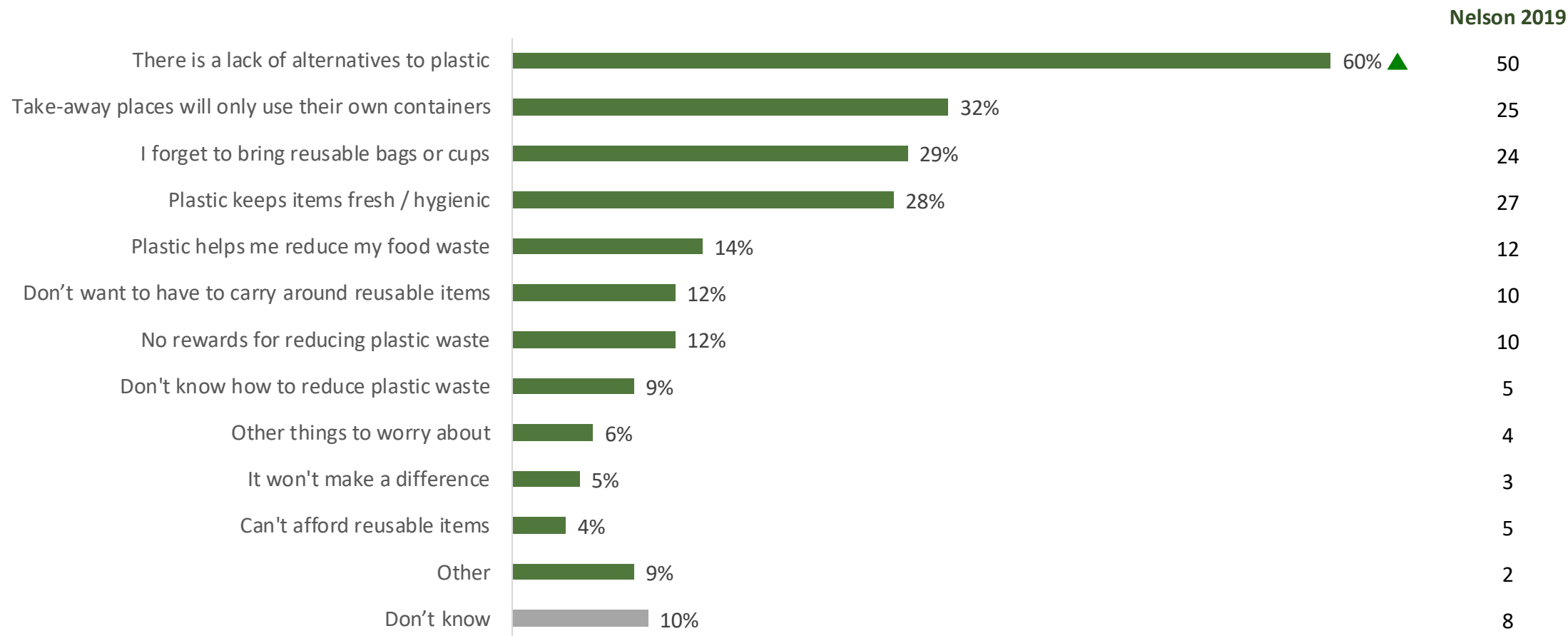
Urban dwellers
(8.9)



School leavers
(8.2)

BARRIERS TO REDUCING WASTE: Six in ten residents believe that a lack of alternative stops them from reducing their plastic use, and this has increased compared to the 2019 Nelson research. Around three in ten residents mention takeaway stores only using their own containers, forgetting reusable containers, and plastic keeping items fresh, as barriers to reducing the amount of plastic waste they generate.

What prevents you from reducing the amount of plastic waste you generate?



Source: F2
 Base: All residents [Nelson / Tasman 2021 n=150
 Nelson 2019 n=325]

▲ ▼ Significantly higher / lower than Nelson 2019
 Please note 2019 results did not include Tasman and so comparisons should be treated with caution.

FOR FURTHER INFORMATION PLEASE CONTACT

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